A Requisition is a formal request from a Department for a Purchase Order for goods or services. Requisitions are used for those purchases that cannot be made using other means such as a Purchasing Card (P-Card). A Purchase Order is based on a request (requisition) by a Department for goods/services, catalog number, price and quantity. When accepted by a supplier, a Purchase Order forms a binding contract.

Setting up Requestor Defaults

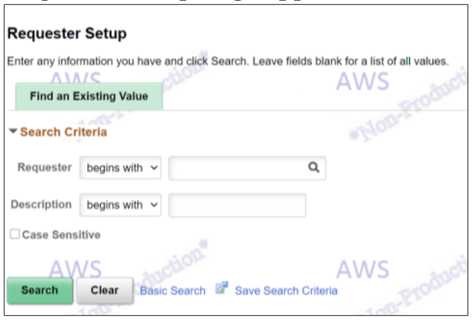
You can set Requestor Defaults for yourself or on behalf of a colleague for whom you make purchases so when you initiate a Requisition, the Shipping, Billing and Distribution (ChartString) information will automatically be entered.

1. In ARC, click the **Buying and Paying** tile and then click the **Update Requestor Defaults** tile.

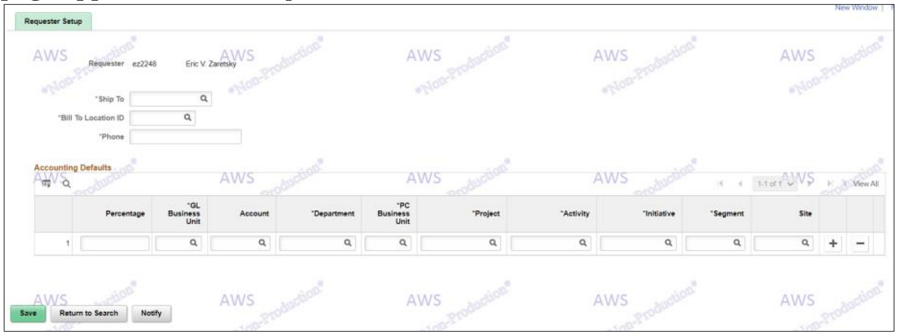
   

   You can also access the Requestor Setup Defaults by clicking **NavBar** > **Main Menu** > **eProcurement** > **Create Requisition** > **Update Requestor Defaults**.

2. Click the **Requestor Setup Page** link. You will be prompted to log into ARC, if you are not already. The Requestor Setup Page appears.

3. Enter the **UNI** of the Requestor you are setting up in the **Requester** field and click **Search**. The Requestor Setup page appears for the Requestor.

4. Enter the **Ship To** and **Bill To Location ID's**. Click the **Search** icon to search and select the Location Code associated with your shipping address.
   Columbia University addresses must already be available as Location Codes. If you cannot find a Columbia Address/Location Code, go to Service Now to submit a Location Setup Request.

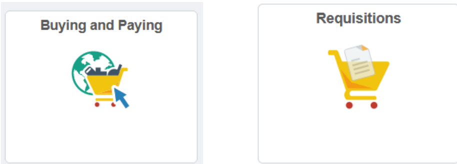
5. Enter a **Phone** number.

6. Type the **ChartField** data into the appropriate **Accounting Default** fields. You can click the **+** icon to add additional Distribution Lines, if any, and complete the ChartFields for the new Distribution Line and indicate the **Percentage** allocation for each. If you have only one line, indicate 100% for the Percentage.

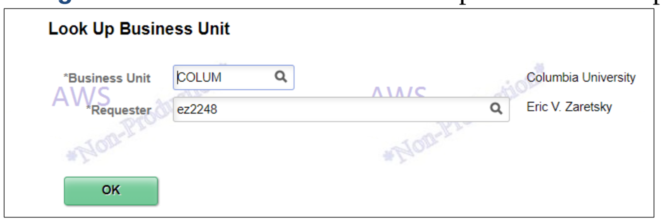
7. Click **Save**.

Creating a Requisition

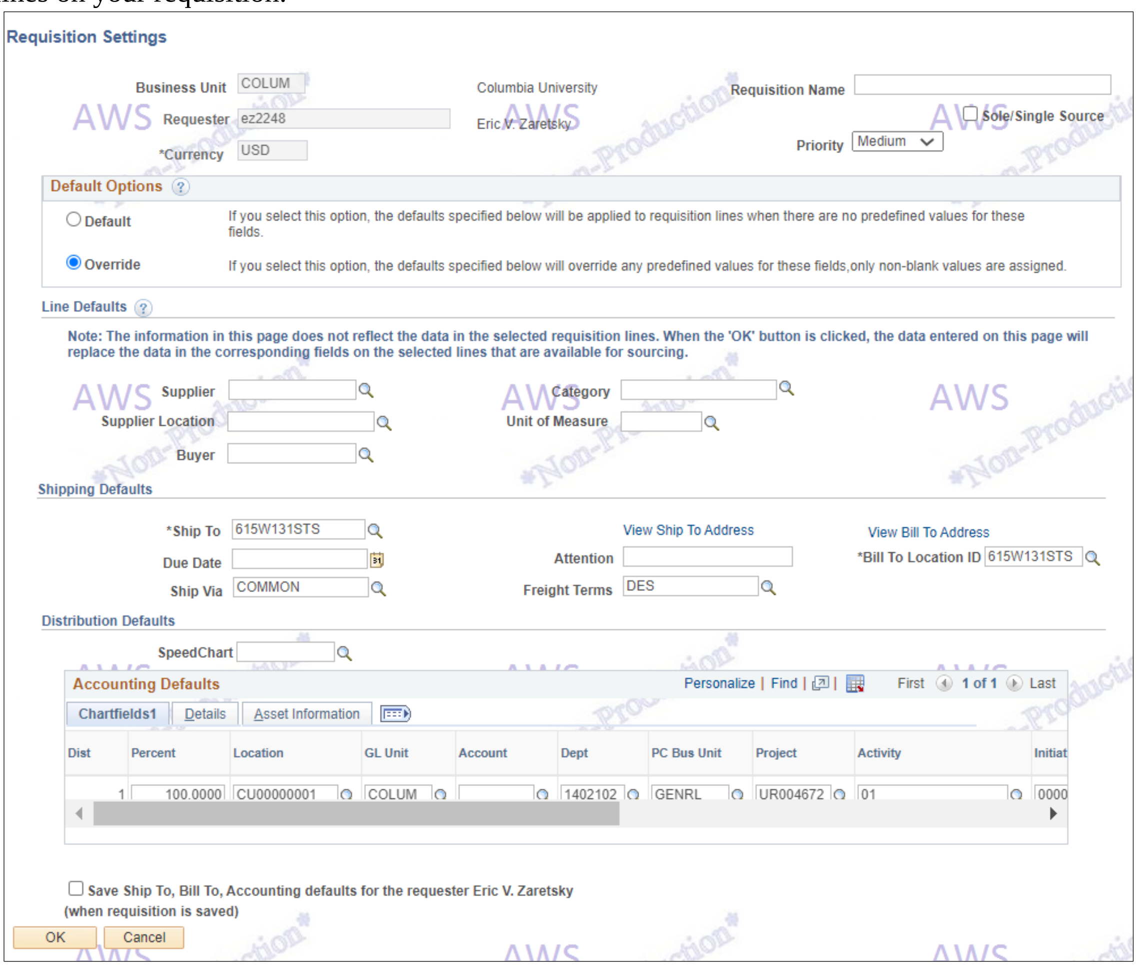
1. In ARC, click the **Buying and Paying** tile and then click the **Requisitions** tile.



You can also click **NavBar** > **Main Menu** > **eProcurement** > **Create Requisition** > **Requisition** or use the **Navigation Search**. The ARC Look Up Business Unit page appears with your UNI in the Requestor field.



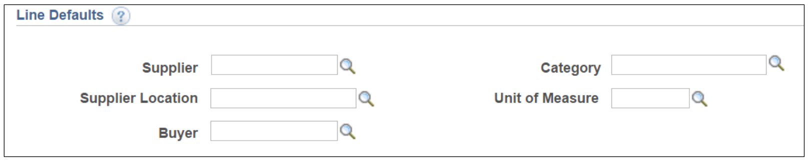
2. You can enter a colleague's UNI as a **Requestor**, if you are purchasing on behalf of that colleague. If you do so, their Requestor Defaults for Ship To/Bill To Address and ChartString information will be entered on the Requisition. Otherwise, your Requestor Defaults will be entered on the Requisition.
3. Click **OK**. The Requisition Setup screen appears with the Requestor defaults. Information entered here applies to all lines on your requisition.



Completing the Requisition Settings

Line Defaults

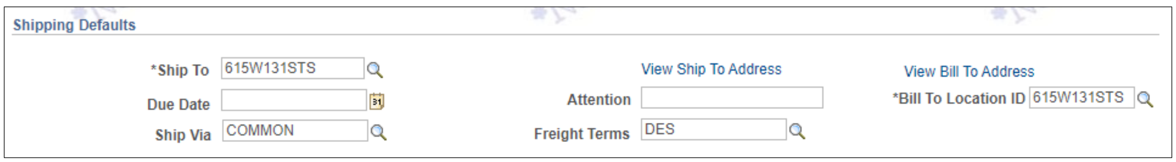
The Line Defaults you enter carry over to the individual lines that you add to the Requisition.



1. Enter the **Supplier**. You can click the Search icon to search and select the appropriate vendor.
2. Enter the product **Category**. You can click the Search icon to search and select the appropriate product Category Code.
3. Enter the **Unit of Measure**. You can click the Search icon to search and select the appropriate unit of measure.

Note: *If you are adding Staples, McKesson, or Fisher Scientific items to your Requisition, do not complete these fields. View the section on Adding Items from a Direct Connect Supplier for more details.*

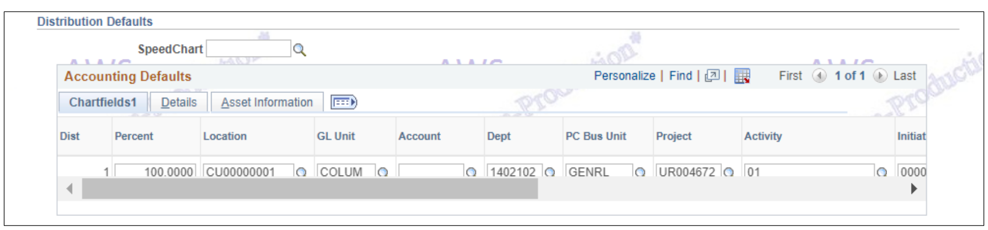
Shipping Details



If needed, you can change the **Ship To** and **Bill To** Locations to differ from the default for this purchase. If the **Ship To** and **Bill To** codes are not entered as defaults, you must enter the codes as these are required fields.

1. To change or enter the **Ship To** information. Click the Search icon to search and select the Location Code associated with your shipping address.
2. To change or enter the **Bill To Location ID** information. Click the Search icon to search and select the Location Code.

Distribution Defaults



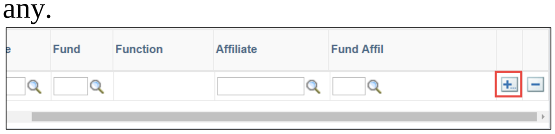
If needed, you can change the **Distribution Defaults** to differ from the default.

1. Type the **ChartField** data into the appropriate fields.

   OR

   Enter a **SpeedChart**. You can use the Search icon to search and select the matching SpeedChart. The SpeedChart automatically populates the ChartFields with matching data.
2. Be sure to enter the correct **Account** information for the type of product or service you are purchasing.

   You can scroll across the Accounting Defaults sections to click the **+** icon to add additional Distribution Lines, if any.



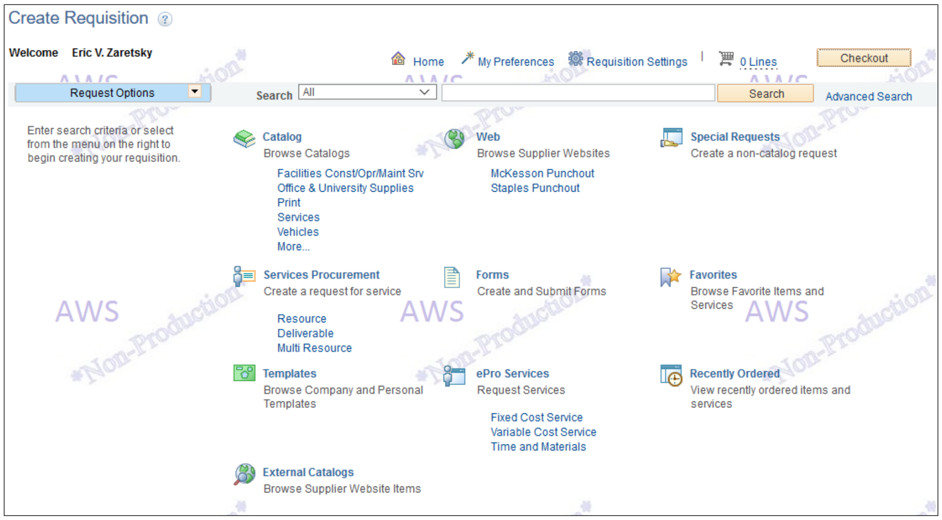
Complete the ChartFields for the new Distribution Line and indicate the **Percent** allocation for each line.

Finishing the Requisition Settings

If needed, you can select the checkbox to **Save Ship To, Bill To, Accounting defaults for the requestor** to create or change the current defaults.

Click **OK**. The Create Requisition page appears.

Adding Items or Services

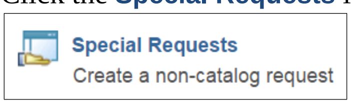


The sections below detail how to add Special Request (for goods related purchases), Fixed Cost Service (for service related purchases), and Direct Connect Supplier items to the Requisition if you have already created.

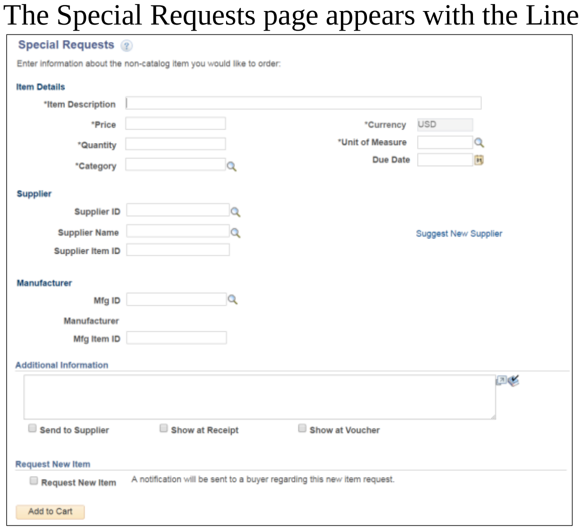
Adding Special Request Items

Use **Special Requests** for goods related requisitions, including software, and when quantity is an important part of the order.

1. Click the **Special Requests** link from the Create Requisition page.



The Special Requests page appears with the Line Defaults you previously entered in Requisition Settings.



2. Complete the fields for the item being purchased:
   - Enter the **Item Description**
   - Enter the **Price** and **Quantity**
3. Write any **Notes** about the Purchase. You can select **Send to Supplier** to have the note sent to the vendor on the Purchase Order.
4. Click **Add to Cart**. The “floating” Shopping Cart displays the current Lines in your Requisition.

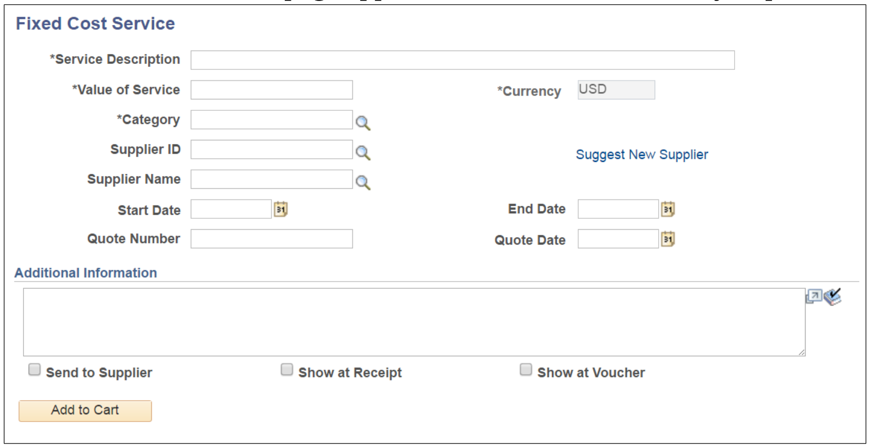
Adding a Fixed Cost Service

Use **Fixed Cost Services** for any requests that have a start and end date (e.g. Consultants, service agreements, and leases).

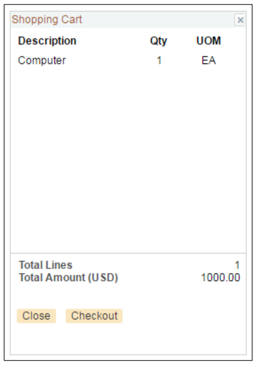
Note: *Refer to the Multi-Year Requisition Training Guide for the steps to create a multi-year requisition.*

1. Click the **Fixed Cost Service** Link from the Create Requisition page.

The Fixed Cost Service page appears with the Line Defaults you previously entered in Requisition Settings.



2. Complete the fields for the service being purchased:
   - **Service Description** and **Value of Service** are required fields.
   - Indicate the **Start** and **End Dates** of the service.
   - Enter the **Quote Number** and **Quote Date**, if applicable.
3. Write any **Notes** about the Purchase. You can select **Send to Supplier** to have the note sent to the vendor on the Purchase Order.
4. Click **Add to Cart**. The “floating” Shopping Cart displays the current Lines in your Requisition.

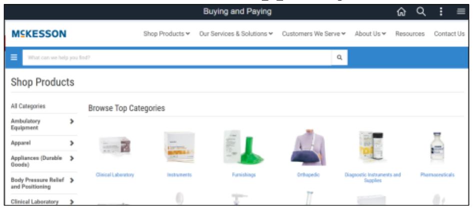


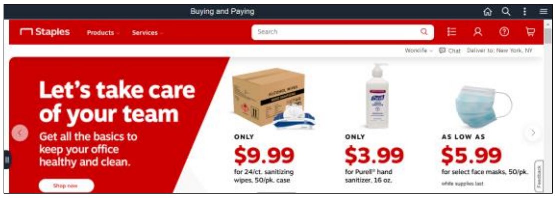
Adding Items from a Direct Connect Supplier

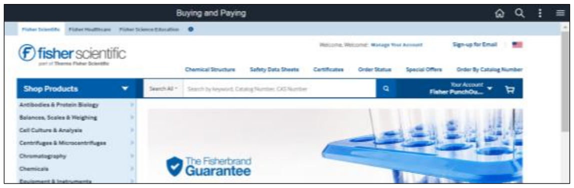
You can also initiate a Requisition for a supplier such as Staples, McKesson, or Fisher Scientific, by clicking the link on the [Buying and Paying]() webpage. If you are adding Direct Connect items to your Requisition, do not complete the Line Default fields from the Requisition Settings Page.

1. Click **McKesson Punchout, Staples Punchout**, or **Fisher Punchout** from the Create Requisition page

The website for the supplier you selected will appear within ARC.







2. Shop and add items to your Cart.
3. Navigate to the **Cart** and click **Submit Order**. The ARC Requisition Checkout - Review and Submit page appears.

Note: *For Fisher Scientific purchases, when purchasing capital equipment with a value of $5,000 or higher, purchasing refrigerators/freezers for research or laboratory use, or that require prior approvals from Asset Management and/or EH&S, initiate a* Special Request *requisition (page 4). Refer to the [Procurement Mechanism Spreadsheet]() for more information.*

Using Tiles to Create a Requisition

You can create a requisition with shortcut menus for Special Request, Fixed Cost Service, or Direct Connect suppliers. You can also find these links on the [Buying and Paying]() page within the Finance website and the [Transaction Quick Links within the ARC Portal](). By using these links, you can eliminate steps when creating your requisition.

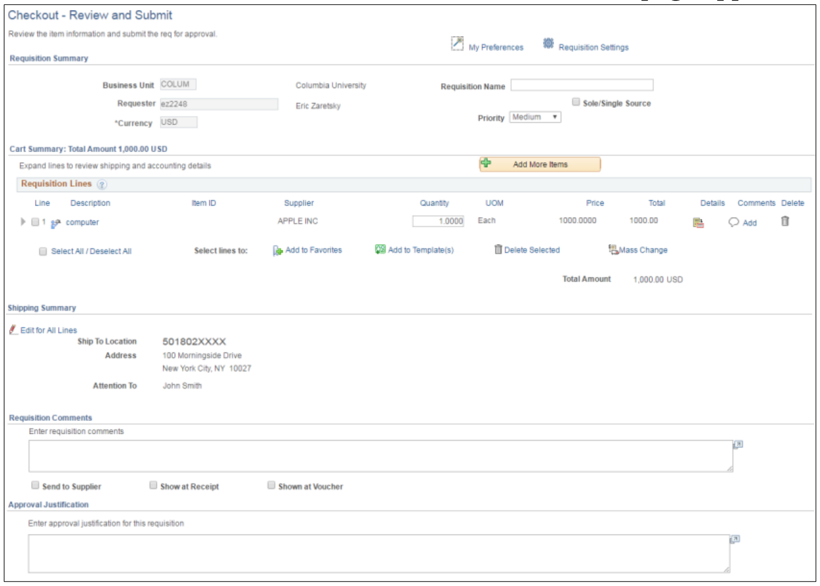
1. Click **Buying and Paying** then select the tile for the type of item you will be adding to the requisition.

The Requisition Settings page appears. For Direct Connect Suppliers, the Supplier ID will be prepopulated.

2. After completing the Requisition Settings page, you will skip the Create Requisition page and go directly to the screen to complete the Special Request or Fixed Cost Service item or to the Staples McKesson, or Fisher Scientific websites to shop for your items.
3. Add your items to the Cart.

Reviewing and Submitting the Requisition

1. Click **Checkout**. The Checkout – Review and Submit page appears.

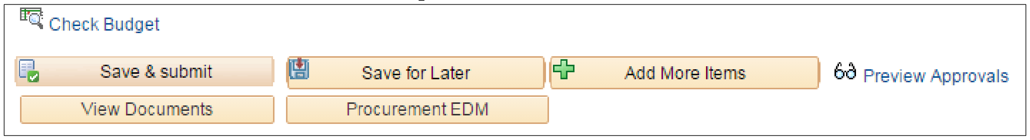


2. Expand to view Line details to view the Shipping and Distribution you previously entered in Requisition Settings.

3. If necessary, set the **Amount Only** flag, which allows you to make multiple payments against the PO line when the Quantity is 1. If the Requisition is for a Fixed Cost Service, the Amount Only flag is required.
   - Click the **Line Details** icon.

   The Line Details page appears.
   - Click the **Amount Only** option and click **OK**.

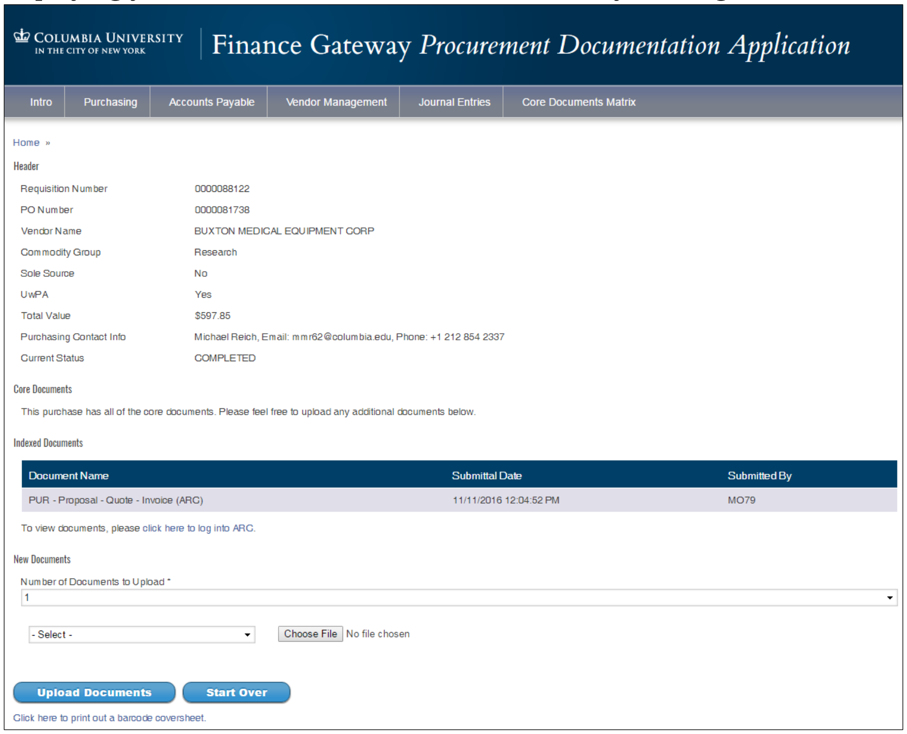
4. You can **Add More Items** to the requisition, if desired.



5. Click **Save for Later** to save the Requisition without Submitting.
6. Click **Procurement EDM** to upload any required documentation. See the Uploading Documentation section for details.
7. Click **Check Budget**.
8. Click **Save & Submit**.

Uploading Documentation

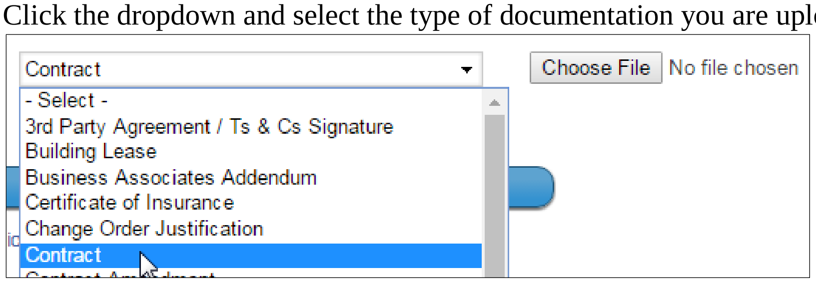
1. Click **Procurement EDM** to upload supporting documentation. The Procurement Documentation application opens displaying your Purchase Order information with any existing documentation.



Note: *If the application opens to the search page you can find your Requisition by entering the Requisition Number.*

2. Indicate the **Number of Documents to Upload**. Each document must be uploaded separately. New rows appear for the number you selected.

3. Click the dropdown and select the type of documentation you are uploading.



Repeat for each document you will be uploading.

4. Click **Choose File** to browse for and select the file you are uploading. Repeat for each file you are uploading
5. Click **Upload Documents**. The Confirmation screen appears and shows the current Approval Status. Return to ARC to submit your Requisition.

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com