

Presented by the Columbia University Purchasing Department

# A Quick Guide to Requisitions and Change Orders in ARC



Quick Guide to Requisitions and Change Orders in ARC



#### **Creating the Requisition**

For detailed instructions refer to the Creating Requisitions in ARC job aid.

1. 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.

#### Vendor Lookup

1. Use the magnifying glass to look up a supplier.

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**Columbia University Finance Training** 

Quick Guide to Requisitions and Change Orders in ARC

2. Use short name field to locate supplier.

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5 0000046760	DELL CATALOG SALES	CHK-01		PO BOX 120001	DALLAS	тх	<b>Ph</b>	
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7 0000099168	DELL SOFTWARE INC	CHK-01	CHECK	5 POLARIS WAY	ALISO VIEJO	CA		
8 0000107048	CHARLES E LIDDELL	CHK-01	CHECK	42 UXBRIDGE ROAD	SUTTON	MA		
9 0000110403	DENKMODELL GMBH	CHK-01	CHECK	PFUELSTRASSE 5	BERLIN	BE		
10 0000110403	DENKMODELL GMBH	WIRE-01	WIRE TRANSFER	PFUELSTRASSE 5	BERLIN	BE		

3. Click on the icon in the last column to see if the supplier is available for requisition use

Favorites	🕶 Main Menu 🕶	> eProcu	rement + > Requisition	1		
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Supplier	Detail					
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ARC

Quick Guide to Requisitions and Change Orders in ARC

#### Bill to/Ship to Address

1. Requestor can select the Bill To Address and the Ship To Address.

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2. Select the appropriate address. Note the Floor and Room Number are included in the Description.

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**Note:** If an address is not listed, please contact the Finance Service Center to add the address.

00	<b>COLUMBIA UNIVERSITY</b>
	IN THE CITY OF NEW YORK



#### **Chartstring**

- 1. Requisition header versus requisition line entry *(it is important that only one of the two following entries are selected)* 
  - a. Entry of a chartstring in requisition header will maintain the chartstring value throughout all lines of requisition.

*\*it is important to note that the header must only have one chartstring. If you require multiple chartstring value(s), this must be inserted into the individual lines as indicated in #2 below.* 

- b. Entry of chartstring(s) into individual lines only will require the entering of chartstring information for each line of requisition
- 2. The Natural Account ChartField is tied directly to the Category Code (present only for requisition processing)
  - Natural Account will update based on Category Code selected (provide example)

#### **Category Codes**

- 1. Requisition header versus requisition line entry *(it is important that only one of the two following entries are selected)* 
  - a. Entry in header will maintain category code throughout all lines of requisition
  - b. Entry in lines only will require category code information for each line of requisition
- 2. Category codes are important as they are necessary for proper routing of requisition as well as to obtain improved reporting
- 3. To look up category codes in ARC when creating a purchase requisition:
  - Select the magnifying glass next to the Category Code box
  - Select Description

Favorites  Main Menu  Procurement  Requisition	
	Home Worklist Add to Favorites
ARC	
Look Up Category	
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Note: You may either Search or Browse to look up the appropriate category for your special request.	
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Description	
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• Type in description and click "Find"

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Quick Guide to Requisitions and Change Orders in ARC

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You may either Search or Browse to	look up the appropriate categor	y for your special request.		
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Catalog	Category	Description	Find in Tree	
1 Non Catalog	43211502CAP	High end computer servers- Capital		
2 Non Catalog	43210000CAP	Computer equipment-Capital		
3 Non Catalog	43212100CAP	Computer printers-Capital		
4 Non Catalog	43211501CAP	Computer servers-Capital		
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7 CU_ITM_IT_HARDWARE	43210000	Computer equipment accessories- Minor	æ	
8 CU_ITM_IT_HARDWARE	43212100	Computer printers-Minor	<del>@</del>	
9 CU_ITM_IT_HARDWARE	43211500	Computers-Minor	æ	
10 CU_ITM_LEASE_RENTL	81112400	Computer hardware leasing	æ	
11 CU_ITM_LEASE_RENTL	8111240001	Computer hardware rental	<del>@</del>	
2 CU_ITM_SERVICES	81112300	Computer hardware maintenance & support	<del>@</del>	
3 CU_ITM_SERV_PROV	81111600	Computer programmers	æ	

Refer to the Procurement Category Codes and Natural Accounts job aid for a list of Category Codes.

4. Incorrect use of Category Codes can result in misrouting or denial of requisition by Central that can delay the processing of the transaction

#### Add Items Page

- <u>Special Item</u>: The use of this selection is generally for goods related requisitions where the quantity is an important part of the order to the supplier
- <u>Fixed Cost Service</u>: The use of this selection is for service related requests that have a specific start and end date (e.g. Consultants, service agreements, leasing, etc.). Additional points are:
  - Only the first line of a requisition can be classified as a Fixed Cost Service as there can only be 1 line that maintains a service start and end date. All other lines must be categorized as Special Items only
  - Amount only flag should always be used when selecting a Fixed Cost Service (see Amount Only section below for additional information)
  - Multi-year PO's are available through this selection only (see Multi-year PO's below for further details)

\*budgets beyond year 1 must be established through the budget tool prior to initiating the requisite process

Must have budget established for each year you will require (this can be a \$0 budget except for

In the event the contract runs beyond 4 years, the remaining year(s) would need to be entered into

• The first line of the requisition represents a description of the fixed cost service transaction and does not have any dollar value (*the system will provide an alert indicating the line has \$0*). Dollar

• The due date for each budget line **must** be the last day of the respective fiscal year

## **General Requisition Information**

- 1. When adding a line item, it is important to be sure that:
  - Clear description of product or service that is being requested Unacceptable Line Information: purchase reagent to purchase computer service agreement

     never type in "<u>see quote</u>" in the line item description

     Acceptable Line Information: Dell 780 computer with monitor Mono-S Strongcation Exchanger Annual service contract for GE ultrasound
  - The quantity, unit cost and unit of measure is correct
  - You include the quote or proposal information (this should be done using the standard comments field and be sure to check the flag "to vendor" so the comments are transferred to the Purchase Order)
  - If you have not entered in a chartstring as part of the header process (step 1 of the requisition process) then you will need to do so at this time

## Amount Only Flag

- 1. Used for service related contracts (not used for capital leasing)
- 2. If this is not a service related category, then the amount only flag must be selected during the last step of the requisition create process, which is Review and Submit
- 3. When selected, all quantities on the respective line(s) will be converted to a value of 1 unit
- 4. It is also important to review the extended dollar value of the line item(s) as this might have changed due to the update in the quantity



#### **Columbia University Finance Training** Quick Guide to Requisitions and Change Orders in ARC

Multi-year PO's

*arant related budgets)* 

Year 4 requisition line

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Refer to the <u>Creating a Multi-Year Requisition</u> in ARC job aid.

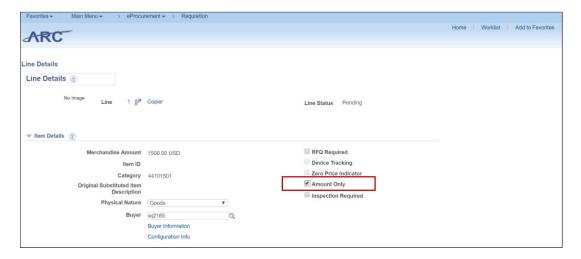
The maximum number of budget years supported by ARC is 4



#### **Review and Submit Page**

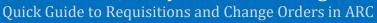
- 1. This is the final opportunity to review the transaction prior to submitting into workflow for approval
- 2. All elements should be reviewed for accuracy
- **3.** A budget check should be performed prior to submitting the transaction into workflow and should budget check fail, this **must** be corrected prior to submitting
- 4. If you want to update the amount only flag for the line(s) this is the point at which this is accomplished:
  - Select the yellow notepad to the far right of the line which represents "line details"
  - This will open up a screen that will provide the line details and the "Amount Only" selection is located at the right bottom of the line details
  - If this flag is updated, once the flag is selected a warning will appear indicating that the quantity of the line will be converted to 1 unit (*amount only can only have a quantity of 1*)

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## **Columbia University Finance Training**



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For Multi-year contracts

- Select the small triangle icon to the left of the line number this will expand the line information
- Select the tab for Budget Information
- Update the budget date to correspond with each fiscal year
- 5. For details on how to complete a multi-year requisition please go to the Purchasing website and click on "Multi-Year Requisitions Guidance"

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6. Be sure Due Date is set to the end of the respective fiscal year for that line





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- 7. Once completed and you are back on the Review and Submit page it is strongly advised you run the budget check process (this can potentially avoid the requisition being stopped right before the PO is issued and cause delays). For multi-year requisitions, you must receive a "valid" or "warning\*" on the budget, if you receive an error, the budget line was not created and you must review with your business manager to have the budget created in the budget tool and rerun the budget check (verify budget dates are correct)
- 8. \$0 line items can be accomplished, but a warning will be displayed so the customer is aware there are no monies on this line

#### Using UwPA's

It is important that both the supplier ARC ID and the Category Code match the preferred supplier information in order for the auto-sourcing feature occur. Refer to <u>the Goods and Service Catalog</u> to determine if UwPA is available for your product category.





- 1. Change Order should be done when updates are required for:
  - o Increased quantity
  - Increased value
  - Due date
  - Cancellation of the PO
  - Chartstring modification (Financial Change Order)
- 2. Change Orders are not required most times when the value of an invoice exceeds the current PO value within an accepted variance/tolerance, which is 10% or \$5000, whichever is lower. This variance allows for items such as shipping charges and small incidental fees that may not have been anticipated when the purchase order was originally created. Above this threshold, however, a change order is required to increase the value of the original Purchase Order
- 3. When completing a Change Order, it is **mandatory** that you complete the "Justification" sections this will provide details to both the approver and Central as to what is being changed.

#### For details on creating a Change Order in ARC, please see the Creating Change Orders Job Aid.

#### PO Liquidation (Close)

- 1. This occurs either through
  - a. Processing a final voucher and selecting the "finalize" icon during the payment process
  - b. Perform a Change Order to reduce value to \$0 or the remaining value.
- 2. Proceed to the "Add/Update" PO page, enter the PO number in the search criteria and use the "contains" filter.
- 3. Proceed to reduce PO line values to \$0 or less the amount over the already paid/received amount (*be sure that the "Amount Only" flag is not checked*)

**Note:** This can only be done when PO is in "Dispatch" status. **Note:** This process can only be used for ARC based PO's and not converted PO's.

#### For details refer to the <u>Closing Purchase Orders</u> Job Aid.

#### **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 <u>https://columbia.service-now.com</u>