Create a Requisition
Standard Goods and Services Checklist

1. Select a supplier.
   - U Market (umarket.umn.edu)
   - U Wide Contract Suppliers (uwidecontracts.umn.edu)
   - Targeted Suppliers (purchasing.umn.edu): Small businesses owned by women, minorities, and persons with disabilities.
   - Other Suppliers

2. Complete required forms or processes per University policy.
   
   Relevant Forms
   - Price and Supplier Justification Form
   - Prepaid Debit Card (PPDC) Study Form
   - Department Request for Exception to Board of Regents Policy Form
   - RFP Planning Document

<table>
<thead>
<tr>
<th>Type of supplier</th>
<th>Requisition totals less than $10,000</th>
<th>Requisition totals between $10,000-$49,999.99</th>
<th>Requisition totals between $50,000-$249,999.99</th>
<th>Requisition totals $250,000 or greater</th>
</tr>
</thead>
<tbody>
<tr>
<td>U Market (Supplier ID begins with SQ)</td>
<td>Form: N/A</td>
<td>Form: N/A</td>
<td>Form: N/A Approval required by Purchasing Services.</td>
<td>Form: N/A Approval required by Purchasing Services.</td>
</tr>
<tr>
<td>U Wide Contract</td>
<td>Form: N/A</td>
<td>Form: Price and Supplier Justification</td>
<td>Approval required by Purchasing Services. Other: Reference U Wide Contract # in requisition's header comments.</td>
<td>Forms: Exception to Regents Purchasing Policy OR a competitive bid is required. Approval required by Purchasing Services.</td>
</tr>
<tr>
<td>Prepaid Debit Card Program (Supplier is PPDC)</td>
<td>Form: PPDC Study Approval required by Purchasing Services.</td>
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</tr>
<tr>
<td>Any other supplier type not specified above.</td>
<td>Form: N/A</td>
<td>Form: Price and Supplier Justification</td>
<td>Forms: RFP planning document OR an Exception to Regents Purchasing Policy is required.</td>
<td>Forms: RFP planning document OR an Exception to Regents Purchasing Policy is required.</td>
</tr>
</tbody>
</table>
CREATE A REQUISITION

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > EFS/Finance > eProcurement > Create Requisition.

- Click on the appropriate requisition type to add items and services.
  - <U Market>
    - a. Search for specific item(s).
    - b. Click <Add to Cart> for each item.
    - c. Click <Proceed to Checkout> when finished adding all items.
    - d. Populate the following fields from the available drop-down menus: Capital/Non-Capital, Category, Class.
    - e. Click <Return Cart to EFS>.
    - f. Verify the fields that were entered in U Market: Category and Unit of Measure. If incorrect, close out and start/re-create a new cart in U Market.
    - g. Refer to the Checkout - Review and Submit page in this checklist.
  - <Standard Purchase>
    - a. Verify the fields that were entered into Requisition Settings: Supplier, Category, and Unit of Measure. If necessary, modify field(s) on the requisition directly.
    - b. Enter the following fields: Description, Price, and, if applicable, Supplier Item ID. See descriptions of these fields in the “Create Requisitions” manual.
    - c. Additional Information: This field contains “line level” comments. It can be populated here or on the Checkout – Review and Submit page. Review the instructions on line level comments later in this checklist.
    - d. Click <Add to Cart> for each item.
    - e. Click <Checkout> when complete. Refer to the “Checkout - Review and Submit” step in this checklist.
  - <Other Purchases – Blanket Order>
    - a. Verify the fields that were entered: Supplier, Category, and Unit of Measure (must be 1 Lot). If necessary, modify field(s) on the requisition directly.
b. Enter the following fields: Description, Price, and, if applicable, the Quote Number and Quote Date. See descriptions of these fields in the “Create Requisitions” manual.

c. Additional Information: This field contains “line level” comments. It can be populated here or on the Checkout – Review and Submit page. Review the instructions on line level comments later in this checklist. Click <Add to Cart> for each item.

d. Click <Checkout> when complete. Refer to the “Checkout – Review and Submit” step in this checklist.

Checkout – Review and Submit page (for all contract types)

- Requisition Summary section
  a. Verify Requisition Name is populated.
  b. If blanket order, enter start and end dates.

- Cart Summary section
  a. Click <Add> to enter comments specific to the “line level” on the requisition. Comments pertaining to the specific line such as discounts, freight, or other instructions should be added on the line level. Check Send to Supplier, Show at Receipt, and Show at Voucher as applicable.
  b. Verify the fields that were entered. If necessary, modify field(s) on the requisition directly.

- Shipping Summary section
  a. Requisition Comments and Attachments: Comments put in this field are called “header level” comments. These comments pertain to the entire requisition order such as: discounts, freight, and required forms.
  b. <Add More Comments or Attachments> must be used to add attachments, if applicable. For header comments, use only one attachment per comment. See the “Create Requisitions” manual for a list of required forms for standard goods and services. Check Send to Supplier, Show at Receipt, and Show at Voucher as applicable.
c. **Approval Justification**: In accordance with the Justification Standards policy, provide the justification for requisition in this field. Include the 5 W’s (Who, What, Why, When, Where).

- Click <Save and Submit> after data has been entered to route for approval.

**TIPS AND TRICKS**

- **Optional**: Click <Requisition Settings>.
  - Populate specific field(s) that will be applied to the overall requisition such as: *Requisition Name, Unit of Measure, Ship To, and Accounting Defaults*. These fields can also be populated within the specific contract requisition. See descriptions of these fields in the “Create Requisitions” manual.