



Central Washington University

**Online**

**Purchase Requisition**

**FAQ Guide**

FOR QUESTIONS, CONTACT THE CWU PURCHASING OFFICE

# CWU Online Purchase Req FAQs

## Contents

- MyCWU Online Purchase Requisition “Data Entry” FAQs ..... 2
  - Q1: How do I attach documents to a requisition? ..... 2
  - Q2: Why does my requisition status show “Open” under Manage Requisitions?..... 4
  - Q3: How do I edit, copy or cancel my requisition?..... 4
  - Q4: I am confused with the category as there are so many of them in the system! Which one do I use? ..... 4
  - Q5: Is it necessary to use the “Requisition Settings” page?..... 5
  - Q6: Can I change a requisition once it is converted into a Purchase Order?..... 6
  - Q7: Where do I see the status of my requisition? ..... 6
  - Q8: How do I add additional lines to my requisition? ..... 6
- Using Split Accounting on Requisitions FAQs ..... 7
  - Q9: I need to split my line item for two departments. How do I do that?..... 7
  - Q10: What is the difference between distribute by amount and distribute by quantity (split accounting only)? ..... 7
  - Q11: I have five lines on my requisition totaling \$1000. I don’t care about individual line item splits but I want to split the total requisition as follows: \$600 to DEPTA and \$400 to DEPTB. How do I do that? ..... 8
- Fixed Cost Requisitions FAQs ..... 9
  - Q9: What type of requisitions are created under Special Requests? ..... 9
  - Q10: I don’t know what type of description to write under the Service Description for a Fixed Cost Service..... 9
- Miscellaneous FAQs ..... 10
  - Q11: Should my quote match the dollar amount on my requisition? ..... 10
  - Q12: How can view Approvals? ..... 10
  - Q13: How can view Receiving information? ..... 10
  - Q14: How can view Payment information? ..... 11
  - Q15: What are other ways I can get questions answered? ..... 11

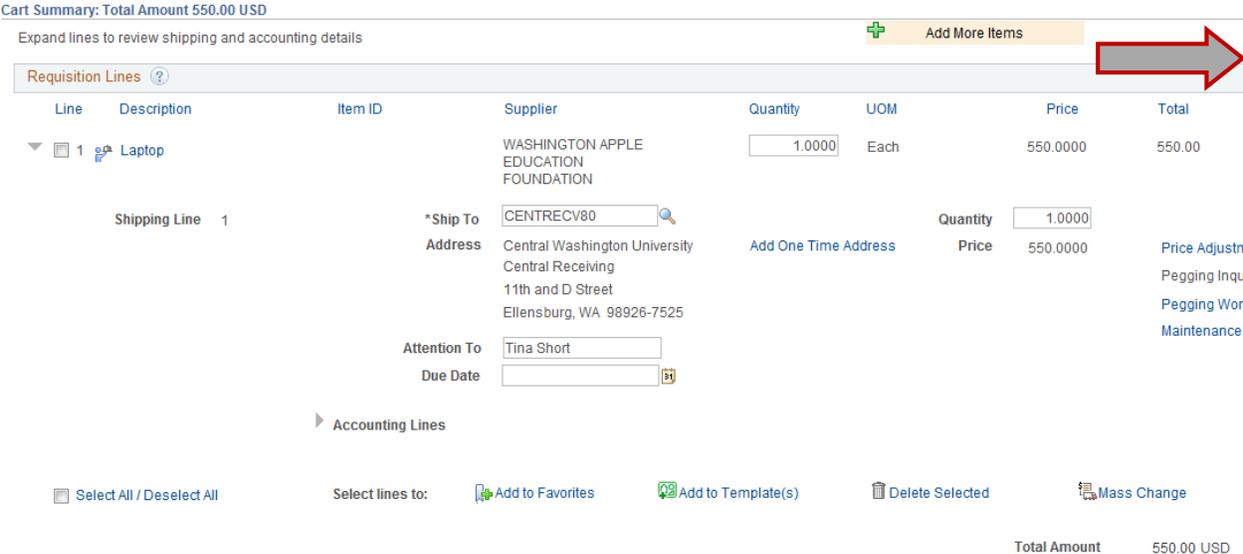
MyCWU Online Purchase Requisition "Data Entry" FAQs

**Q1: How do I attach documents to a requisition?**

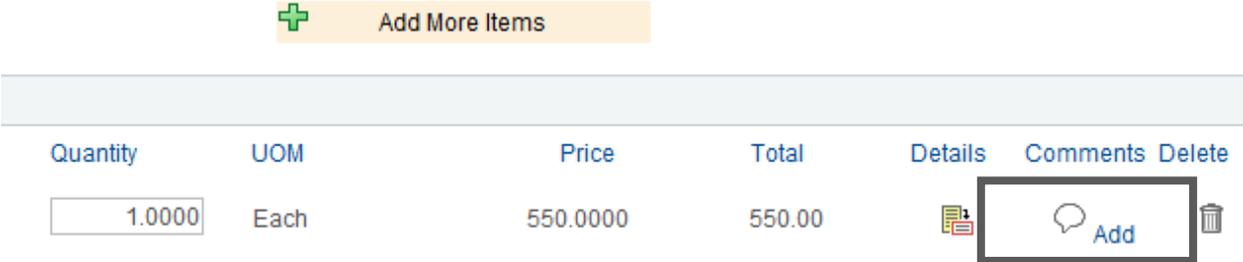
A) After clicking the Checkout button and moving onto the Check-out Review and Submit Section under the **Requisition Lines** area, click the  next to the link number. Then on the comments icon  at the end of your requisition line.



B) In the below example you would scroll over to the right past the Total field to see the Comments/Attachments area.



C) The below screenshot is what you see when you scroll to the right.



# CWU Online Purchase Req FAQs

D) Click **Add Attachments** button.

E) Click **Browse** button. Identify your document and click it and click **Open** button.

F) Click **Upload** button.

G) Finally, click **OK** button.

Business Unit CWUID		Requisition Date 12/17/2015
Requisition ID 000007198		Status Pending
Line 1		

Attached File	User/Date Time	View
1 Reporting.docx	SHORTT2015-12-18-11.41.06.967	View

## CWU Online Purchase Req FAQs

### Q2: Why does my requisition status show "Open" under Manage Requisitions?

A: It is because you have saved it but not submitted it. Select "**Edit**" under the drop down to the

right and click **Go** button, open the requisition, and click  at the bottom of the page. This changes the status to "**Pending**" approval.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000007199	0000007199	CWUID	12/18/2015	Pending	Not Chk'd	5.00 USD	[Select Action] Go
▶ 0000007198	Test Requisition	CWUID	12/17/2015	Open	Not Chk'd	5.00 USD	Edit Go

### Q3: How do I edit, copy or cancel my requisition?

A) On the Manage Requisitions page, select "**Edit**", "**Copy**" or "**Cancel**" under the drop down to the right and click **Go** button.

#### Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	CWUID	Requisition Name		Budget Status	
Requisition ID		Request State	All but Complete		
Date From	12/11/2015	Date To	12/18/2015		
Requester	SHORTT	Entered By		PO ID	

Search Clear Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

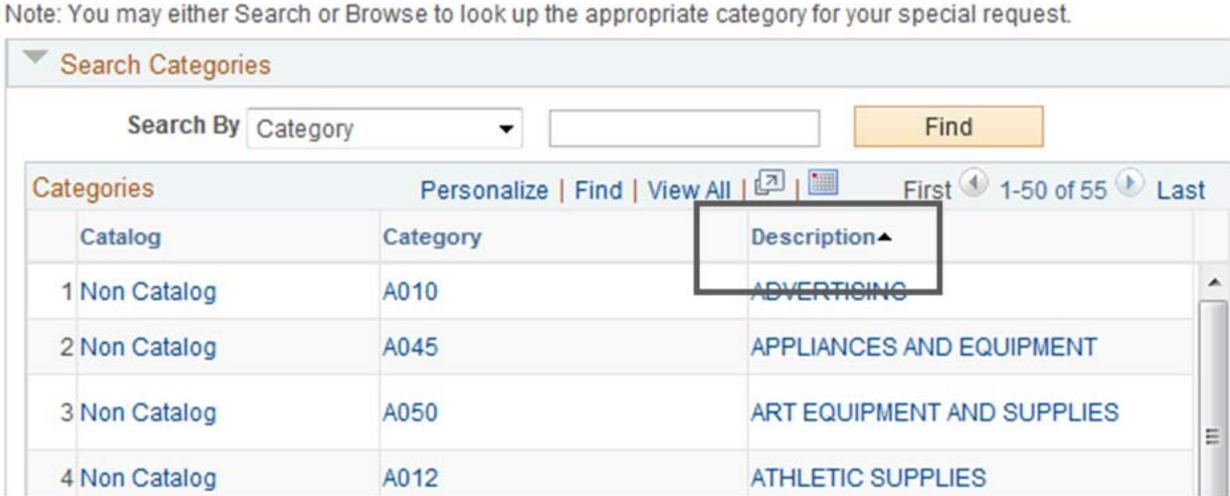
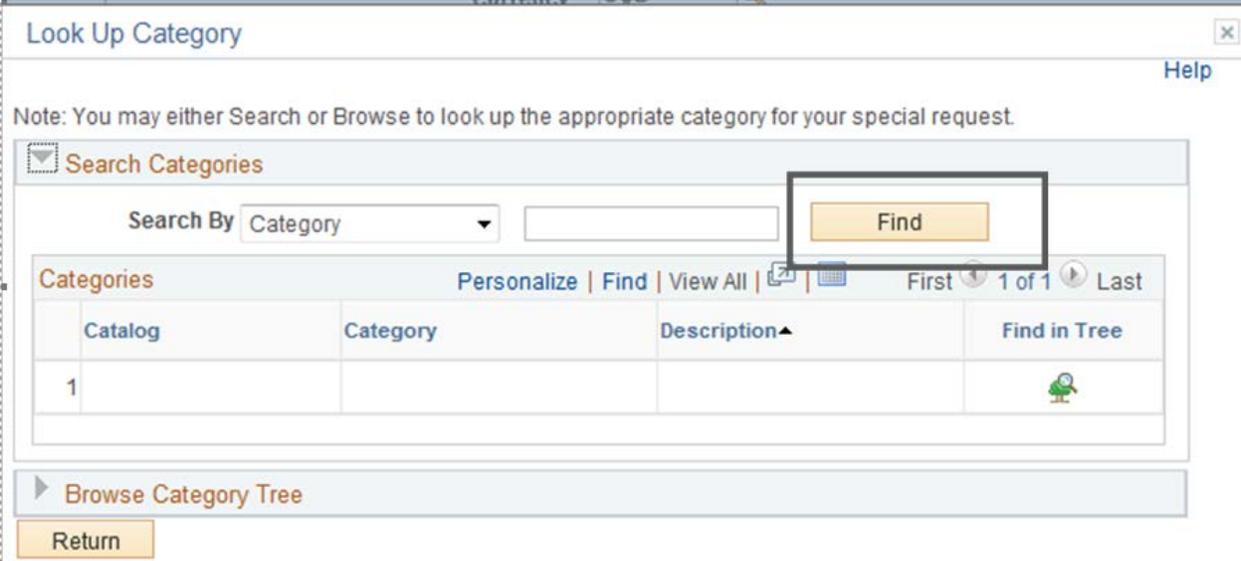
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000007199	0000007199	CWUID	12/18/2015	Pending	Not Chk'd	5.00 USD	Edit Go
▶ 0000007198	Test Requisition	CWUID	12/17/2015	Open	Not Chk'd	5.00 USD	Cancel Go

### Q4: I am confused with the category as there are so many of them in the system! Which one do I use?

If you want to narrow down the **\*Category** , make sure you enter a more specific search. Put in something such as "Supplies". If you want to make it more specific, make it "Office Supplies" and search. Another helpful tip is to click the button "**Find**" with no values in the Search By description. Once all the items appear, click on the Description link and it will sort the search results alphabetically.

See below example.

# CWU Online Purchase Req FAQs



**Q5: Is it necessary to use the “Requisition Settings” page?**

A) Yes. This is the area where you name your requisition. Also, if you have the same information (such as supplier (formerly vendor), unit of measure) for each line, it is easier to use the “Requisition Settings” page, set those defaults up and then not worry about adding them for each line.

**Note:** If you do not enter a value in the Requisition Name field on this page, it will put in a description of the requisition number the system assigns. This field is helpful for searching for requisitions you entered.

**Q6: Can I change a requisition once it is converted into a Purchase Order?**

A) No, you cannot change a requisition once it has been sourced to a PO. In that case, contact the buyer and he/she will initiate a change purchase order to send to the vendor.

**Q7: Where do I see the status of my requisition?**

A) Navigate to MyCWU > Main Menu > Financial Management > eProcurement > Manage Requisitions. If you can't find your requisition, use the search fields to expand or narrow your search. Once you locate your requisition, use the small triangle to the left of the requisition ID



to expand the requisition and from there, you can look up approvals, PO statuses and invoice the requisition details (whichever icon is eligible Approvals, Purchase Orders, Invoice, Payment).

**Q8: How do I add additional lines to my requisition?**

A) If you are editing an already saved requisition that hasn't been submitted, click the "Add More Items button".

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: CWUID Central Washington University Requisition Name: Test Requisition
Requester: SHORTT Christina Short Requisition ID: 0000007198
\*Currency: USD Priority: Medium

Cart Summary: Total Amount 5.00 USD

Expand lines to review shipping and accounting details

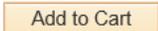


Requisition Lines

Table with 7 columns: Line, Description, Item ID, Supplier, Quantity, UOM, Price. Row 1: 1, Test Computer, ABACUS ENGINEERED SYSTEMS INC, 1.0000, Each, 5.0000. Includes 'Select All / Deselect All' and 'Add to Favorites' buttons.

Total Amount

If you have not saved the requisition yet and want to add more line items, each time you add an item to your cart the Special Requests entry page indicates that you can enter a new item. Once you add the new detail, scroll to the bottom of the page and click Add to Cart.



## Using Split Accounting on Requisitions FAQs

**Q9: I need to split my line item for two departments. How do I do that?**

A) One of the ways to do that:

- ✓ After adding items, click the Checkout button. From the Edit Requisition –Review and

Submit page   1  Laptop use the triangle next to the line number to expand the line. Use the triangle to the right of the accounting lines  Accounting Lines to expand the Accounting Lines information to add another accounting line and then split that line item. Use the “+” all the way to the right of accounting information to use this method.  
**OR**

- ✓ Prior to clicking the “+”, click the Qty or Amt under Distribute By field. Adjust the quantity field or dollar amount field and then click the “+” to add the additional row. Then update the accounting information on the new line.



Note that any split accounting should add up to 100% for that line.

**Q10: What is the difference between distribute by amount and distribute by quantity (split accounting only)?**

A) Example of **Distribute by amount**: If you are buying one piece of equipment that needs to be

split between two departments, use the Distribute by amount  as shown. Another example for distribute by amount is this: You are buying 5 microscopes for \$1000 each. However, you want the total \$5000 to be split for two departments with \$2800 going to dept1 and \$2200 going to dept2. In that case, for the first line delete out the original value of \$5000

and enter \$2800 in the amount field and click on the  button on the right hand side of the page. Note you may have to scroll over if your monitor is smaller. A new line will be created if should automatically fill in the \$2200 dollars into the amount field. You will need to adjust the SpeedChart Key and Operating Unit to reflect the second department accounting information.

Example of **Distribute by quantity**  : Use if you are clearly splitting the 5 microscopes by quantity. (Example) 3 to DepartmentA and 2 to DepartmentB. First remove the 7

## CWU Online Purchase Req FAQs

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in the quantity field and enter 3 in the quantity field. Click on the  button on the right hand side of the page. Note you may have to scroll over if your computer monitor screen is smaller. A new line will be created and should automatically fill in with the quantity of 4 in the amount field. You will need to adjust the SpeedChart Key and Operating Unit to reflect the second department accounting information.

***Q11: I have five lines on my requisition totaling \$1000. I don't care about individual line item splits but I want to split the total requisition as follows: \$600 to DEPTA and \$400 to DEPTB. How do I do that?***

A) There are a couple of options:

- 1) You can go line by line. For example, if line 1 is for \$500, line 2 is for \$200, line 3, 4 and 5 are for \$100, then put the \$600 on line 1 and line 3 for dept1. Then use the \$400 for lines 2, 4 and 5. You can "mix and match" your accounting lines.
  
- 2) You can also split each line by amount for 60% and 40%. You need to calculate the percentage based on the overall split.

### Fixed Cost Requisitions FAQs

**Q9: *What type of requisitions are created under Special Requests?***

A) All requisitions can be created under Special requests. Examples are honorariums, repairs, consulting services.

**Q10: *I don't know what type of description to write under the Service Description for a Fixed Cost Service.***

A) Below are examples of sample descriptions of various services:

REPAIR FOR MODERNFOLD PARTITION(S) IN SURC BALLROOM PER QUOTE GIVEN JANUARY 31, 2013.

**OR**

HONARIUM FOR \*\*\* INSERT NAME OF INDIVIDUAL \*\*\* TO SPEAK AND MEET WITH STUDENTS ON MARCH 1, 2013.

**OR**

FALL PROTECTION REPAIR & CERTIFICATION 1<sup>ST</sup> YEAR INSPECTION PRICE.  
ROOM RENTAL FOR LIUZHOU MPA PROGRAM REM 205 WINTER COURSE (2 SINGLE ROOMS) – INCLUDING FEES AND TAXES FOR 2 NIGHTS @\$77.83 PER NIGHT.

**OR**

ADVERTISING FOR COLLEGE OF BUSINESS 5" X 6.49" FULL COLOR AD IN THE CURRENT – RUN DATE APRIL 22, 2013.

**OR**

CONSULTING SERVICES TO IMPLEMENT MEDICATE EHS MODULE PER ATTACHED SCOPE OF WORK.

**OR**

PROGRAM REVIEW OF SCIENCE EDUCATION PROGRAM PER CONTRACT #XXXX.

## Miscellaneous FAQs

### Q11: *Should my quote match the dollar amount on my requisition?*

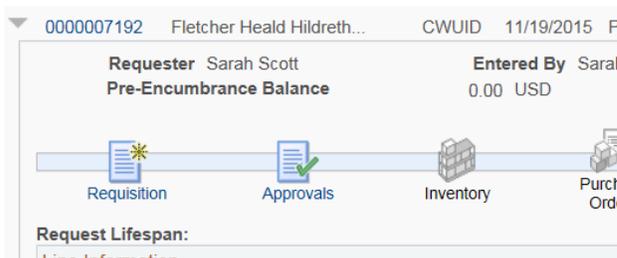
- A) Yes, if it doesn't than either change the dollar amount on your requisition or get an updated quote.

### Q12: *How can view Approvals?*

- A) Use the Manage Requisition page, navigate to: **Main Menu > Financial Management > Employee Self Service > Procurement > Manage Requisitions**

Or Click the link for Purchase Requisitions in the FMS Toolbox pagelet.

- B) View the requisition lifecycle information (including approvals), by clicking on the arrow next to the requisition number ▶ 000007192 Fletcher Heald Hildreth.. Click on the **Approvals** icon.



### Q13: *How can view Receiving information?*

- A) Use the Manage Requisition page. View the requisition lifecycle information (including approvals), by clicking on the arrow next to the requisition number ▶ 000007061 Click on the **Receiving** icon.



## CWU Online Purchase Req FAQs

### Q14: How can view Payment information?

- A) Use the Manage Requisition page. View the requisition lifecycle information (including approvals), by clicking on the arrow next to the requisition number **000007174** | Click on the **Payment** icon.

The screenshot displays a requisition lifecycle flowchart for requisition number 000007174. The requisition is titled "Fingerprint Invoice for..." and is associated with CWUID 11/17/2015, PO(s) Dispatched, and Valid status. The amount is 3,156.75 USD. The requester is Crystal Weddington, and the entered by is also Crystal Weddington. The priority is Medium. The Pre-Encumbrance Balance is 0.00 USD. The flowchart consists of nine steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. The Payment step is highlighted with a green box and a gold coin icon, indicating it is the current step.

### Q15: What are other ways I can get questions answered?

- A) If you have any questions, please visit the Purchasing website to reference our user guides or email [purchasing\\_office@cwu.edu](mailto:purchasing_office@cwu.edu) or call 509-963-1002.