

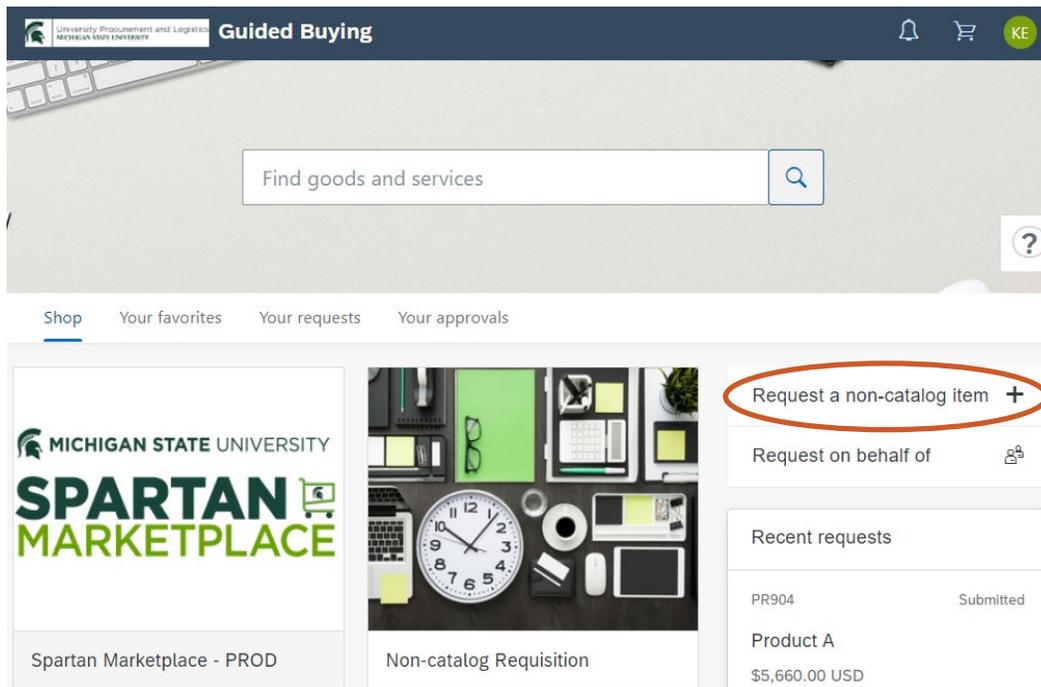


How to Create a Purchase Requisition (PR) for Non-catalog Goods and Services

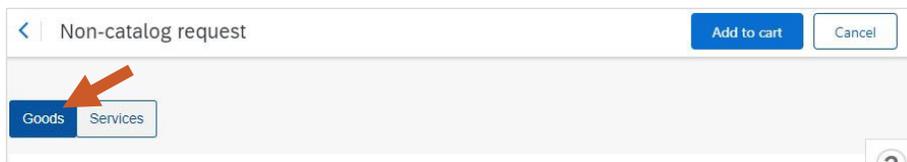
Overview: This tutorial provides a detailed step-by-step guide on how to create a requisition for non-catalog goods and services.

Add items to a non-catalog purchase requisition

1. Login to ebs.msu.edu and select the **Procure-to-Pay System** tile.
2. Click on **Request a Non-catalog item**.



3. You will be presented with two options—**Goods or Services**. For this demonstration, we will select **Goods**. Selecting the Services button will present a different set of fields to complete.



4. Add an appropriate and descriptive **Product name** and **Description** of the item.

The screenshot shows the form fields for 'Product name' and 'Description'. The 'Product name' field is a text input box with a red arrow pointing to it. To its right is a 'Category' dropdown menu with the text 'Choose a category' and a downward arrow. Below these is the 'Description' field, which is a larger text input box with a red arrow pointing to it.



- In the **Category** dropdown menu, search for and select the commodity code that best applies to the product to be purchased.

Name

| ID | Name | |
|--------|--|---------------------------------------|
| 44 | Office Equipment and Accessories and Supplies | <input type="button" value="Choose"/> |
| 4410 | Office machines and their supplies and accessories | <input type="button" value="Choose"/> |
| 4411 | Office and desk accessories | <input type="button" value="Choose"/> |
| 4412 | Office supplies | <input type="button" value="Choose"/> |
| 441032 | Office time recording machines and accessories | <input type="button" value="Choose"/> |

- Add the **Quantity** needed, the **Unit of measurement**, and **Unit price** of each item.
 - Note:** If you don't know the unit price, you can put in a desired price or budget, which will help Procurement better source an appropriate product.

Quantity *

Unit of measure *

Unit price *

- Select a supplier by selecting the **View all suppliers** button.
 - Note:** if you don't have a supplier in mind, you can submit the purchase requisition without this. All items on the purchase requisition must have the same supplier selected (which can be none).

Supplier

Recommended supplier

- Search by supplier name or number, click the applicable supplier, and click **Select**.

Select a supplier

| Supplier ID | Supplier name | Preferred | Diversity | Street | City | Stat |
|-------------|--|-----------|-----------|---|-------------|------|
| 101262-0 | BRAND ENERGY & INFRASTRUCTURE HOLDINGS | | | 12701 Beech Daly Rd | Taylor | |
| 1015-0 | BIOMERIEUX INC | | | 595 ANGLUM RD PO BOX 42016 | HAZELWOOD | |
| 1016-0 | BIO-RAD LABORATORIES | | | PO Box 843821 | Los Angeles | |
| 1019-0 | BLACK & VEATCH LTD OF MICHIGAN | | | 3550 Green Ct | Ann Arbor | |
| 103101-0 | CONVERGEONE INC | | | 10900 Nesbitt Ave S | Bloomington | |
| 103863-0 | FEI COMPANY | | | 5350 NE Dawson Creek Dr | Hillsboro | |
| 104275-0 | BAKER HUGHES HOLDINGS LLC | | | DBA PANAMETRICS LLC 1100 TECHNOLOGY PARK DR | BILLERICA | |

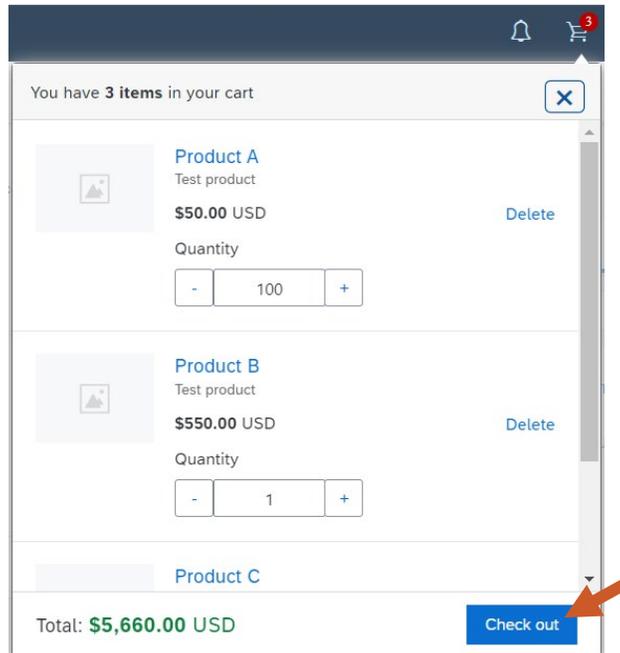
Your search results exceed the limit. Change the search criteria to narrow your results.



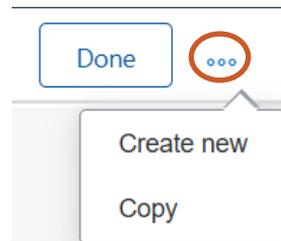
8. Add the good or service to your purchase requisition by selecting the **Add to cart** button.



- a. A pop-up will appear, detailing the content of your cart.
 - i. If you are finished adding items, select the **Check out** button and proceed to the next section of this tutorial.



- ii. If you have more products to add, click the blue **X** under the cart icon, select the ... menu.
 - 1. Select the **Create new** option to add a new good or service.
 - 2. Select the **Copy** option to duplicate the product information for the most recent item added to your cart. This will duplicate all descriptive information for the item, including the price, quantity, and supplier.



Checking out and submitting the purchase requisition

- 1. Ensure the **Ship To** address is accurate based on your final delivery address.
 - a. **Note:** All on-campus locations in East Lansing should have MSU Central Receiving as the Ship To address.



2. Verify and complete any questions at the top of the purchase requisition.

On Behalf Of: Khan, Emily

Is this an emergency order? Yes No

Will the supplier have the potential to interact with children and/or MSU students as part of this purchase? Yes No

Will the supplier have access to MSU IT networks or computer systems other than the MSU Guest Wireless system or an MSU email account? Yes No

Will the supplier handle cash, credit cards, or other sensitive information? Yes No

Recipient Building Name: 0169: INTERNATIONAL CENTER

3. Enter the final delivery information (all fields that begin with **Recipient**).

a. **Recipient Building Name:** select the building from the dropdown

- i. **Note:** change the search dropdown to Building Name from ID, which will allow you to type in part of the name.
- ii. If you cannot locate a specific MSU location in the dropdown menu that you believe should be there, please contact the Capital Asset Management team at camhelp@msu.edu.
- iii. Certain off-campus locations may not be available for selection, and Building Not Found should be selected.

Recipient Building Name

Building Name | Center

| ID | Building Name | Choose |
|----------|---|--------|
| EL_0111 | 0111: PARKING RAMP NO. 3 - WHARTON CENTER | Choose |
| EL_0150 | 0150: KRESGE ART CENTER | Choose |
| EL_0150A | 0150A: KRESGE ART CENTER-SCULPTURE STUDIO | Choose |
| EL_0155 | 0155: PARKING RAMP NO. 4 - KELLOGG CENTER | Choose |
| EL_0169 | 0169: INTERNATIONAL CENTER | Choose |
| EL_0181A | 0181A: CENTER INTEGRATIVE PLANT SYS - LAB | Choose |

b. **Recipient Address, City, State, Zip, and Country:** auto-populated from the selected Recipient Building Name unless Building Not Found was selected. In these instances, you will need to type the appropriate address information.

c. **Recipient Room Number:** select from the dropdown menu

- i. **Note:** Only options for the selected building are available. If a room is missing for the selected building, please contact the Capital Asset Management team at camhelp@msu.edu.

d. **Recipient Department:** select from the dropdown menu



4. Complete the accounting information by product.

a. **Organization, Chart Code, Account, and Object Code** are all required fields.

i. **Note:** If you are a fiscal officer (FO), the accounting information in the product will lock if you switch to another FO's account number. If another FO's account number is required, update all other account information (organization, object code, etc.) before changing the account number. Subaccount numbers are specific to accounts, so that field must be blank before switching to another FO's account number.

b. To split accounting on one product, select the **Split accounting** link at the bottom of this section. Specify the percentage to be charged to each account, totaling 100%.

Organization: (no value) [v]
 ⚠ The value of Organization is not acceptable.

Chart Code *: MS [v]

Account *: (no value) [v]
 ⚠ The value of Account is not acceptable.

Sub Account: (no value) [v]

Object Code *: (no value) [v]
 ⚠ Object Code must be set.

Sub Object Code: (no value) [v]

Project Code: (no value) [v]

Org Ref Id: []

Split accounting [v]

c. **Note:** accounting information can be applied to the full requisition by selecting **Charge to: Manage details** link at the top of the requisition. Just ensure that the object code for each line item is updated to match the item.

Charge to: [Manage details](#)

Organization ((no value))

5. Add any appropriate **Comments** or **Attachments** to the line item.

- > Shipping Ship To (MSU CENTRAL RECEIVING)
- > Comments
- > Attachments
- > Others

6. To duplicate or remove a line item, select the vertical ... menu and select the appropriate dropdown option. This will copy all information populated for the good or service, including the accounting string.

Net Amount
\$1.00 USD

Gross Amount
\$1.00 USD

- Copy
- Delete



7. Add any **Comments**, **Attachments**, or ad hoc approvers/watchers to the **Approval Flow** in the fields at the bottom of the PR.
 - a. **Note:** the Major Administrative Unit (MAU) associated with the account number will be added as watchers to the purchase requisition, granting each employee within the MAU the ability to see but not edit the document.

The screenshot shows three sections of a purchase requisition form:

- Comments:** A text input field with the placeholder "Write your comment...". To the right is a checkbox labeled "Share with supplier" and an "Add" button.
- Attachments:** A dashed box with the text "Drag and drop file here, or browse to upload, then click the Add button." To the right is a checkbox labeled "Share with supplier" and an "Add" button.
- Approval Flow:** A horizontal flow diagram with five nodes connected by a dashed line. The nodes are: "Request" (with a green circle), "Baer..." (with a grey circle), "MSU: 40001164 - UNIV..." (with a grey circle and a person icon), "MSU: Purchasing Proc..." (with a grey circle), and "Approved" (with a grey circle). A note on the right says "Click on the line to add approvers".

8. Click **Submit** to submit the purchase requisition.

Two buttons are shown: a blue "Submit" button and a white "Save and exit" button with a blue border.

9. A pop-up will appear confirming the requisition has been submitted. Click **Done** to exit the order screen or **View requisition** to see the details of what was submitted.

A success pop-up dialog box with a title bar containing a checkmark and the word "Success", and a close button (X). The main text reads "Your requisition has been sent for approval." At the bottom right, there are two buttons: a blue "Done" button and a white "View requisition" button with a blue border.