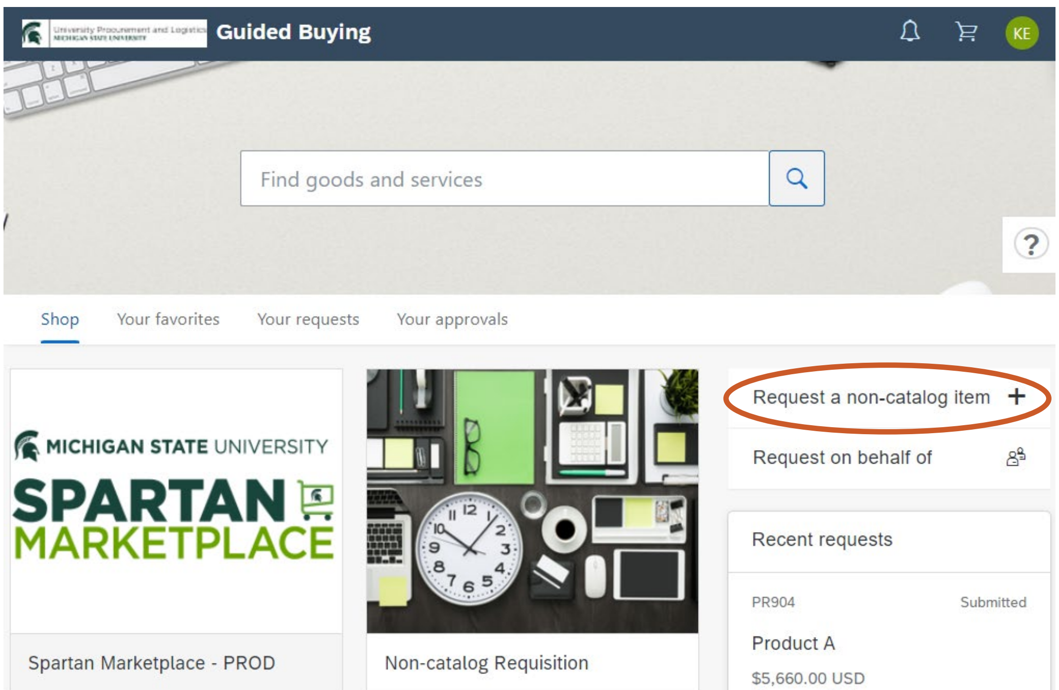
How to Create a Purchase Requisition (PR) for Non-catalog Goods and Services

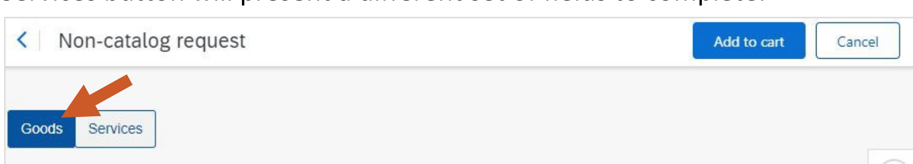
Overview: This tutorial provides a detailed step-by-step guide on how to create a requisition for non-catalog goods and services.

Add items to a non-catalog purchase requisition

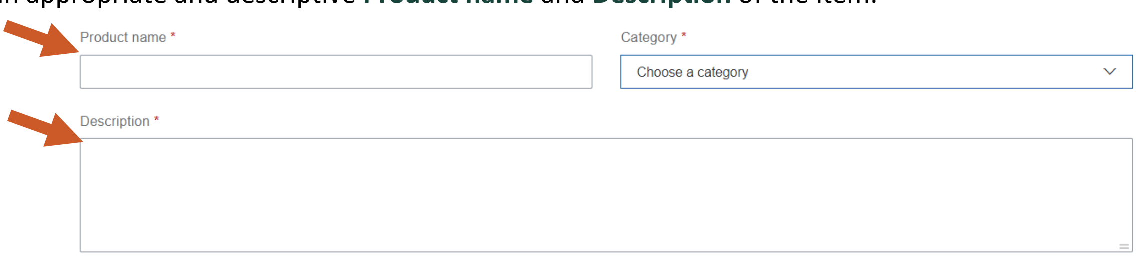
1. Login to ebs.msu.edu and select the **Procure-to-Pay System** tile.
2. Click on **Request a Non-catalog item**.



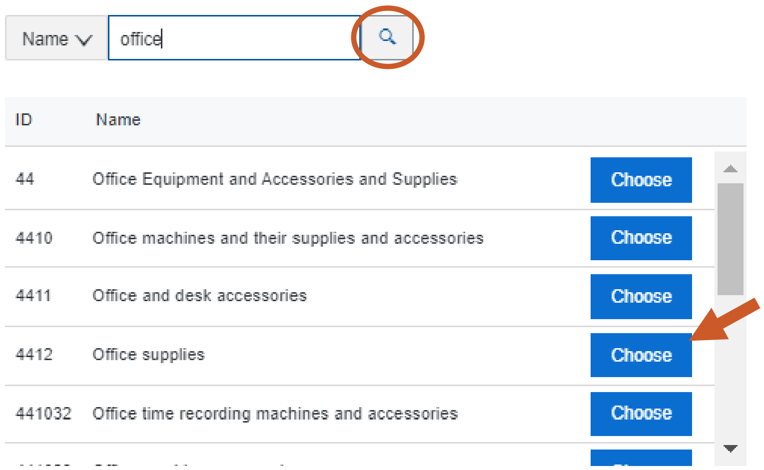
3. You will be presented with two options—**Goods or Services**. For this demonstration, we will select **Goods**. Selecting the Services button will present a different set of fields to complete.



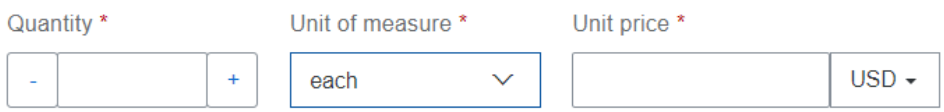
4. Add an appropriate and descriptive **Product name** and **Description** of the item.



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

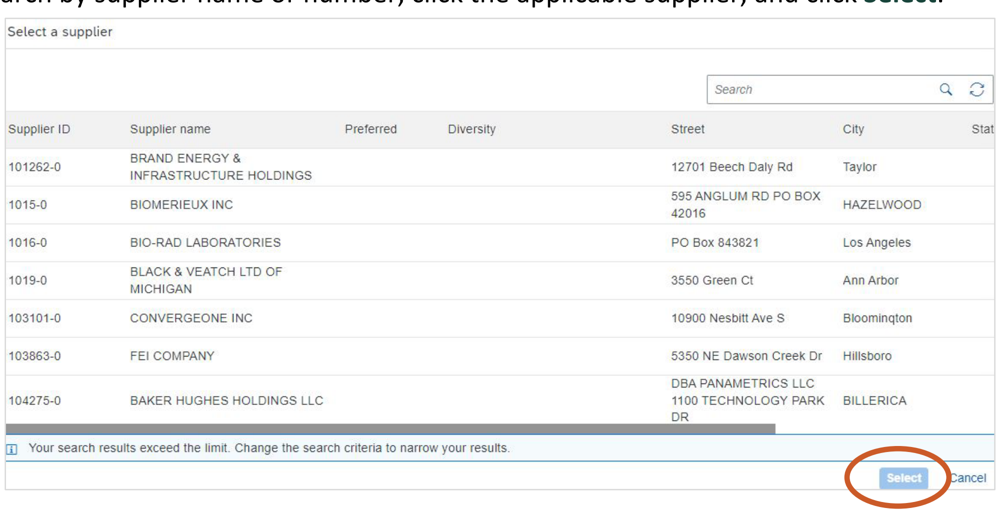


6. Add the **Quantity** needed, the **Unit of measurement**, and **Unit price** of each item.
   a. **Note**: If you don't know the unit price, you can put in a desired price or budget, which will help Procurement better source an appropriate product.



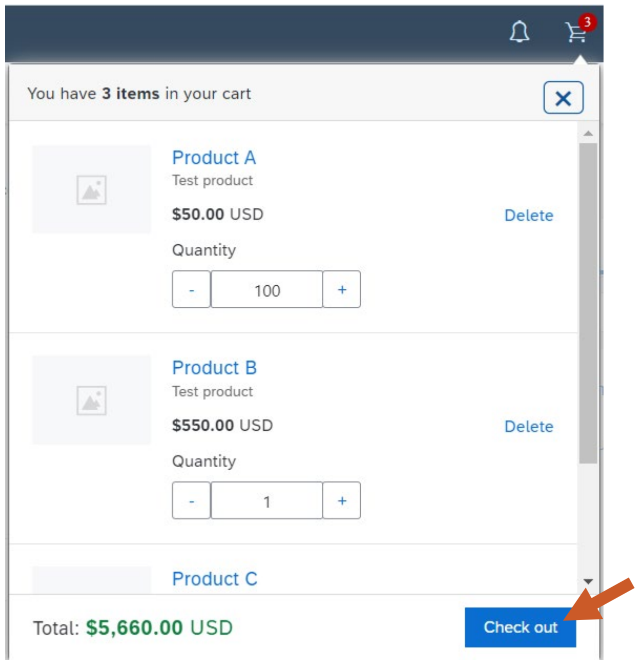
7. Select a supplier by selecting the **View all suppliers** button.
   a. **Note**: if you don't have a supplier in mind, you can submit the purchase requisition without this. All items on the purchase requisition must have the same supplier selected (which can be none).

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

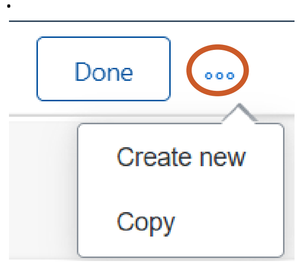


8. Add the good or service to your purchase requisition by selecting the **Add to cart** button.

   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.



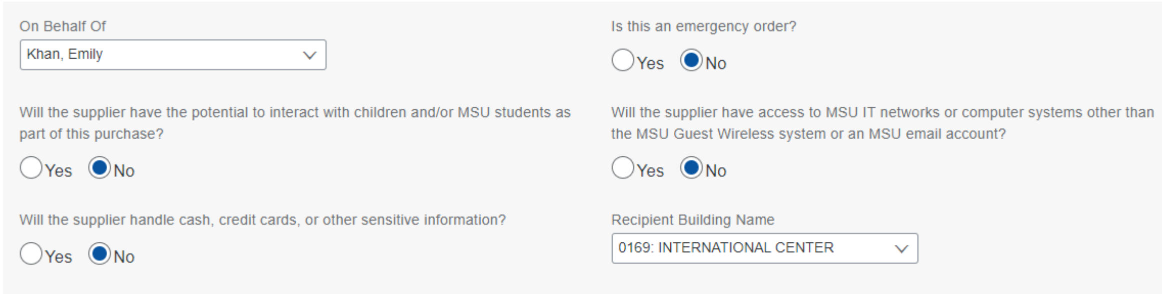
      ii. If you have more products to add, click the blue **X** under the cart icon, select the **...** menu.
         1. Select the **Create new** option to add a new good or service.
         2. Select the **Copy** option to duplicate the product information for the most recent item added to your cart.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



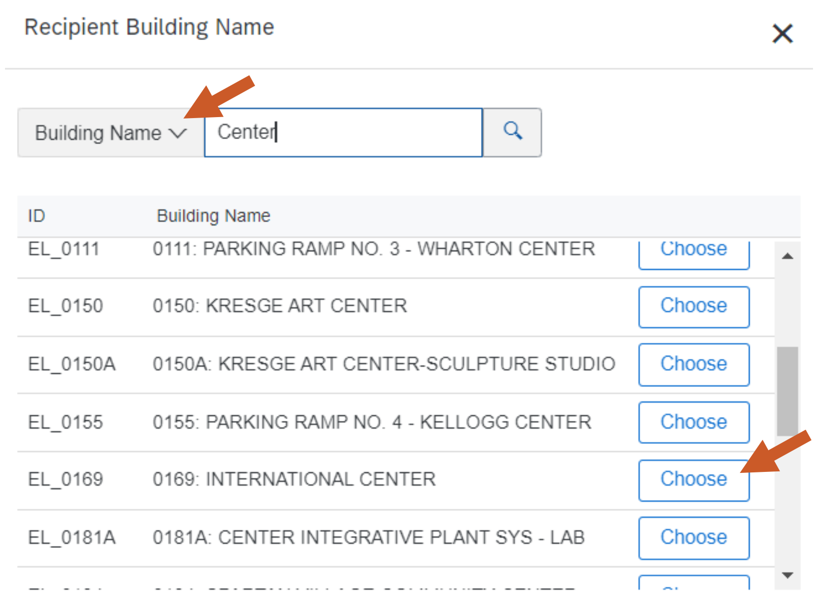
Checking out and submitting the purchase requisition

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.

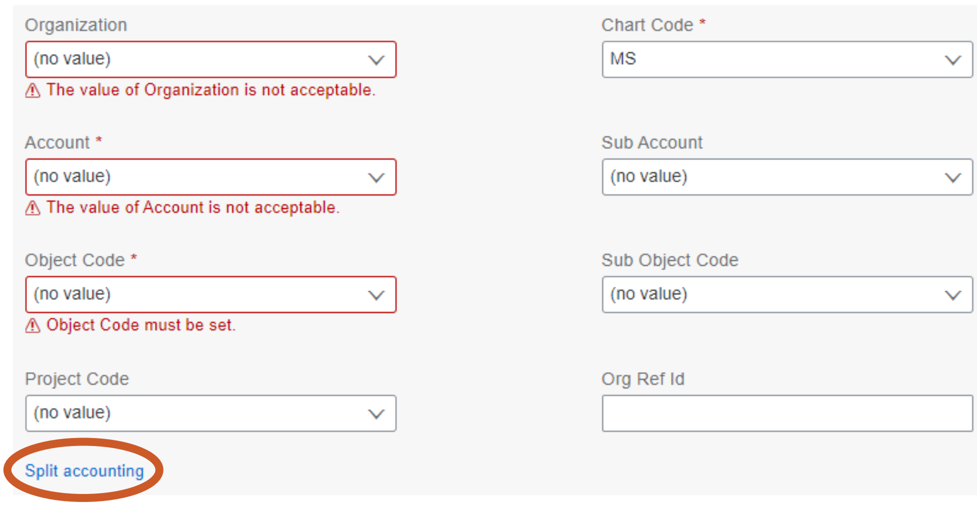


3. Enter the final delivery information (all fields that begin with **Recipient**).
   a. **Recipient Building Name:** select the building from the dropdown
      i. **Note**: change the search dropdown to Building Name from ID, which will allow you to type in part of the name.
      ii. If you cannot 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.

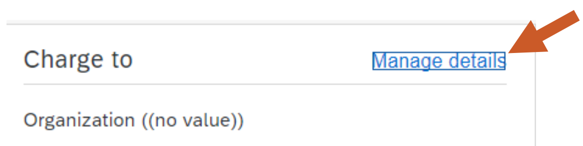


   b. **Recipient Address, City, State, Zip, and Country**: auto-populated from the selected Recipient Building Name unless Building Not Found was selected. In these instances, you will need to type the appropriate address information.
   c. **Recipient Room Number**: select from the dropdown menu
    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

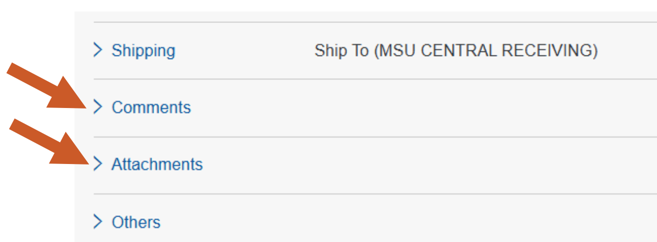
4. Complete the accounting information by product.
    a. **Organization**, **Chart Code**, **Account**, and **Object Code** are all required fields.
        i. **Note:** If you are a fiscal officer (FO), the accounting information in the product will lock if you switch to another FO's account number. 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%.



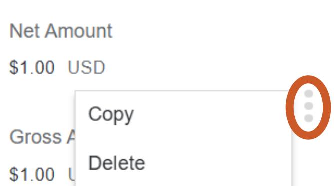
    c. **Note:** accounting information can be applied to the full requisition by selecting **Charge to: Manage details** link at the top of the requisition. Just ensure that the object code for each line item is updated to match the item.



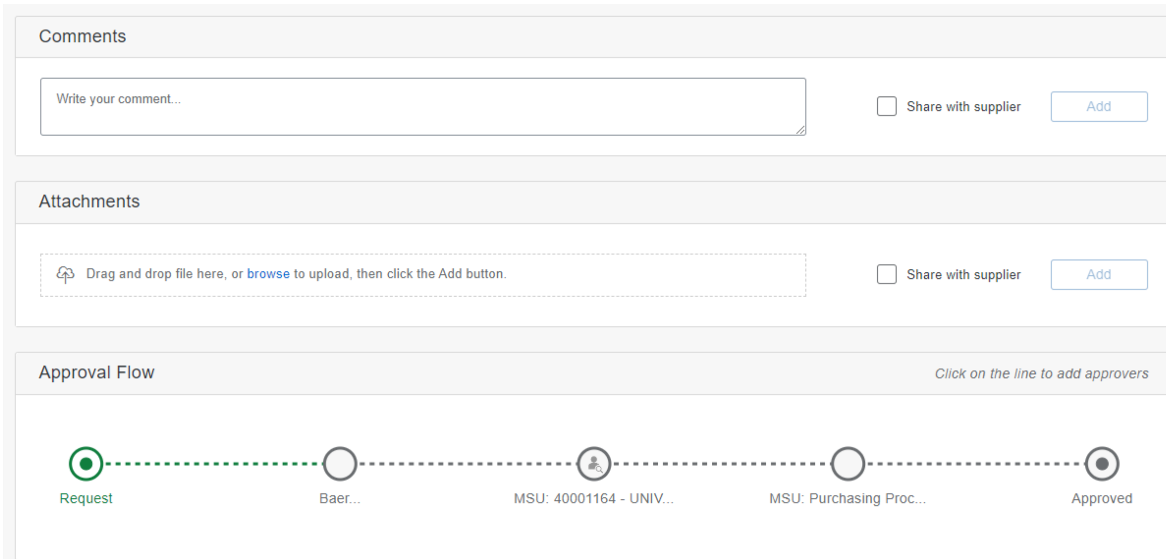
5. Add any appropriate **Comments** or **Attachments** to the line item.



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.



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.



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

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.