

# 1 CREATING A SERVICE PURCHASE REQUISITION (PR)

1. Find the **Request** in the Work Order module.
2. Click **Create PR**. The PURCHASE REQUISITION – CREATE page opens.  
**\*\*NOTE: Create PR changes to View PR after a PR has been created – you can still click the View PR link and a pop-up opens providing the ability to create another PR if needed.**

**REQUEST DETAILS**

**GENERAL INFORMATION** [Shopping Cart \(0\)](#) | [Print Work Order](#) | [Print Procedure](#) | [Work Order - Financial](#)

<b>Request ID:</b>	30366	<b>Asset:</b>	EQ0005958   <a href="#">SCS-GENIE DUAL PERSONNEL LIFT</a>
<b>Requested By:</b>	PM Admin	<b>Date:</b>	9/3/2018 8:00 AM CDT
<b>Phone:</b>	NA	<b>Company:</b>	NDUS
<b>Fax:</b>	n/a	<b>E-mail:</b>	n/a
<b>Created By:</b>		<b>Created By E-mail:</b>	n/a
<b>Created By Phone:</b>			

**REQUEST DETAILS** [Property Comments](#) | [Create Inspection](#) | [Create PR](#)

## 1.1 CREATE SERVICE/MATERIALS PR

- A. The **CREATE PR PAGE** is used to create a purchase requisition, which specifies a list of items you need and the timeframe in which they are needed.

**PURCHASE REQUISITION - CREATE**

PR Date:

Requestor Name:

Attention:

Property:

NTE:

Ship To:

(Maximum characters: 1000) Remaining: 902

Description:

(Maximum characters: 2000) Remaining: 1982

PR Type:

Request Id:

Click OK to save all changes

1. **PR Date:** enter the date on which the PR is being created. This value defaults to today's date.
2. **Property:** auto populates from the WO. If this PR is not being entered off the WO, you'll need to select the building of the WO, or the Facilities building (building 107).
3. **Requestor Name:** auto populates from the logged in user.
4. **NTE field (Not to Exceed) enter your PR approval limit.**

**\*\*NOTE: PR Approvals are now MANUAL instead of automated. If the total cost of the PR exceeds the NTE amount entered (your purchase limit) you need to send the PR on for approval.**

5. **Attention:** Leave blank.

6. **Ship to:** auto populates from Property. It should always be the address of the warehouse.
7. **Description:** **enter the request ID and a general description of your actions.**
8. **PR Type:** auto fill Inventory, **DO NOT CHANGE.**
9. **Request Id:** auto populates.
10. Click "OK "to save changes & create the PR. (This opens the **PURCHASE REQUISITION DETAILS** page.) From here, you can add lines to the Purchase Requisition.

### 1.2 PURCHASE REQUISITION DETAILS PAGE

The Purchase Requisition Details page opens after you create a new PR or when you click a PR number link on the VIEW PR results list. The Purchase Requisition Details page contains general information about the purchase requisition and allows you to add material and service items to the PR, define PR approvals and attach files.

### 1.3 ADD LINE ITEMS TO PR

Click the "ADD MATERIAL/SERVICE" button to add the service items you need to the purchase requisition.

<a href="#">Create PR</a>	<a href="#">Find PR</a>	<a href="#">Buyer</a>	<a href="#">Run Report</a>	Logged on as <span style="background-color: black; color: black;">XXXXXXXXXX</span>
<b>PURCHASE REQUISITION DETAILS</b>				
<b>PURCHASE REQUISITION</b>				<a href="#">Edit Purchase Requisition</a>
<b>PR#:</b>	PRQ248	<b>PR Date:</b>	10/10/2018	
<b>Requestor Name:</b>	Kari Rae Hasbargen	<b>PR Header Status:</b>	Requested	
<b>Attention:</b>	Kari	<b>Property:</b>	Haverty Hall	
<b>Description:</b>	Tools for Timmy	<b>Ship To:</b>	Main Campus 800 6th Street North WHPETON, ND 58076	
<b>PR Type:</b>	SERVICE	<b>Request Id:</b>	<a href="#">39445</a>	
<b>Total Amount:</b>	0.00	<b>NTE:</b>	1000.00 (Approved 0.00)	
<a href="#">ADD MATERIAL/SERVICE</a>			<a href="#">DO NOT USE</a>	

## ADD MATERIAL/SERVICE

MATERIALS-Item:  **Select** **Clear** ■ Request Id: 39552

**Description:**   
(Maximum characters: 2000) Remaining: 2000

**Date Required:**  ■

**Vendor:** Not Selected **Select** **Clear**

**Quantity:**  ■

**Internal Code:**

**Unit Cost:**  ■

**ADD** **CANCEL**

1. Click "select" next to the **MATERIALS-Item** box
  - A. The below search box will appear: enter "1.(Crew-Code)" and click "Find" **only** (example: 1.AM for academic maintenance). 1.AMS and 1.AMD should appear below the search box. Select the Part # ending in "S" for Service Purchases and "D" for Material Purchases. Note, this will populate the correct warehouse.

Enter Part #, FIN, Supplier Part #, Description, or Barcode  Material Class  Warehouse  **FIND**

- B. **DESCRIPTION:** auto populates the name of your crew. **Clear it out.**  
Enter the following: **LP** (if local purchase request only), Request ID, Initials/Crew of Requester, Part name of item(s) requested, location of work, crew picking up or item being delivered, and quoted or estimated price.  
**NOTE:** LP, only if local purchase request - come back, remove "LP" and update PRQ information and submit invoice to warehouse.
  - C. **DATE REQUIRED:** enter or select the date the item is required by.
  - D. **VENDOR:** **MANDATORY for each line**, vendors might have multiple pay sites, they will appear on the list multiple times, search and select the vendor address in the following order when available, 1. SUA, 2. PRIMARY, 3. FMS at the end. These are UND vendors, if you don't see an FMS address, select the vendor address you are receiving the item from.
  - E. **QUANTITY:** For Materials Warehouse enter the quantity of material purchased  
For Services Warehouse enter the **TOTAL COST** of each service line needed.
  - F. **UNIT COST:** For Materials Warehouse enter the **price** of each item purchased  
For Service Warehouse enter **"1"** on each line needed
  - G. Click **"ADD"** to save item. The **ITEM** is now listed on the **PURCHASE REQUISITION DETAILS (PR)** page.
  - H. If PR total cost is less than your NTE (NOT TO EXCEED) amount, you are done!
  - I. If PR is over your NTE amount, follow the approval process below.
- NOTES:**
1. All service PR's require a Crew Terms & Conditions to be sent to [UND.Facilities.Purchasing@und.edu](mailto:UND.Facilities.Purchasing@und.edu) mail box.
  2. Service PR's will have two lines if parts and labor are included in the service. 1 line for parts, and 1 for labor.
  3. **Freight lines:** If you are adding freight cost to a PR, use "1.FRTM" on material requests and "1.FTRS" for service requests. If you are not sure if freight will be charged add the line anyway with an estimated cost. We can cancel the line if not needed.

## 1.4 PR APPROVAL

**\*\*NOTE: PR Approvals are now MANUAL instead of automated. If the total cost of the PR exceeds the NTE amount entered (your purchase limit) you need to send the PR on for approval.**

Follow the approval process if the PR is over your NTE amount:

1. Click the "APPROVALS" box
2. Select your supervisor from the drop down
3. Click "ADD"
4. Click "SEND APPROVAL NOTIFICATIONS"

<a href="#">Create PR</a>	<a href="#">Find PR</a>	<a href="#">Buyer</a>	<a href="#">Run Report</a>	Logged on as [REDACTED]
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**PURCHASE REQUISITION - APPROVAL SUMMARY**

**PURCHASE REQUISITION HEADER** [Purchase Requisition](#)

<b>PR#:</b>	PRQ248	<b>PR Date:</b>	10/10/2018
<b>Requestor Name:</b>	Kari Rae Hasbargen	<b>PR Header Status:</b>	Requested
<b>Attention:</b>	Kari	<b>Property:</b>	Haverty Hall
<b>Description:</b>	Tools for Timmy	<b>Ship To:</b>	Main Campus 800 6th Street North WAHPETON, ND 58076
<b>PR Type:</b>	SERVICE	<b>Request Id:</b>	<a href="#">39445</a>
<b>Total Amount:</b>	500.00	<b>NTE:</b>	1000.00 (Approved 0.00)

**APPROVER RECORDS**

If PR is over your NTE limit, select your supervisor for approval and click ADD

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Approver will get an email notification to approve PR