I. Purpose & Overview
The purpose of this document is to provide campus users with sufficiently detailed information to complete Standard Purchase Requisitions in accordance with University policy and central administration requirements. Requisitions are often subject to additional policies and state regulations.

The Purchasing Department receives requests generated by users for products and services that require a Purchase Order. These requests usually consist of quotes, estimated costs and may require a bidding process. Generally included in these requests are purchases greater than $2000, software renewal, and service contract renewal.

II. Procedure

1) Process Flow

2) Definitions

   a. **Purchase Requisition**: A request for goods and/or services from a non-employee individual or entity that cannot be paid for within the P-Card limits or is greater than $2000.

   b. **Supplier**: A non-employee individual or entity.

   c. **Charge Account**: Indicates the funding source used to pay each line item on a purchase requisition and includes fund, department, cost center, account, supplemental, and project segments.

   d. **Requester**: Indicates the employee requesting the payment and drive standard approval workflow. This may be different from the employee entering the transaction.

   e. **POET**: Indicates a restricted funding source used to pay the specific line item on a purchase requisition. It will include a project, department, and account segments and task number.
3) Requirements

a. Noncatalog Request
   i. Item Type: Select Goods or Services billed by Quantity OR Goods or Services billed by Amount.
   ii. Item Description: Enter a description of the good and/or service requested. Special instructions to Buyer should be add in the Notes to Buyer box rather than in the Item Description.
   iii. Category Name: Enter All Items or select the appropriate NIGP category.
   iv. UOM (Unit of Measure): Enter “E” for each if Item Type is Goods or Services billed by Quantity. This field will not show if Item Type is Goods or Services billed by Amount.
   v. Price: Estimated amount for the item.
   vi. Supplier
      (1) Existing Supplier: Select appropriate supplier in the system.
      (2) New Supplier: Select New Supplier and enter the Supplier Name. Supporting documentation (Vendor Information Form) should be emailed to accounts-payable@boisestate.edu.
      (3) Unknown Supplier: Leave blank.
   vii. Attachments: Documentation should be attached at the top of the requisition.
      (1) Forms: Upload forms applicable to the specific transaction according to policy requirements.
      (2) Supplier Quotes: Upload any quotes that have already been received for the request.
      (3) Request Details: Upload specifications for requisition.
      (4) Department-Specific: Upload additional documentation according to your department business process.
   viii. Justification: Enter the business purpose.
   ix. Delivery
      (1) Requester: The requisition will be routed to the supervisor of the requester for review and approval.
      (2) Urgent: If the request is urgent, update to Yes and enter a Need by Date.
      (3) Need by Date: Default is 7 days. Update if urgent.
      (4) Deliver to Location: Select campus location for delivery or include in Notes to Buyer.
   x. Billing: Enter funding source information for the transaction. Each line of a requisition must have a funding source entered.
      (1) POET: Used to enter project funding sources.
         a. Project Number: Ten digit project segment.
         b. Task Number: 100002 for tagable assets, otherwise use 100001.
         c. Expenditure Type: Six digit account segment.
         d. Expenditure Organization: Five digit department segment.
      (2) Charge Account: This describes the funding source and should only be updated for non-grant funding sources. Each segment should be entered.
a. **Funding Source**: Select a favorite from your drop down. <OR> Enter
b. **Fund**: Four digit fund segment.
c. **Department**: Five digit department segment.
d. **Cost Center**: Seven digit cost center segment.
e. **Account**: Six digit account segment.
f. **Supplemental**: Ten digit supplemental segment; enter zeroes if not used.
g. **Interfund**: Default to 0000.
h. **Project**: Ten digit project segment; enter zeroes if not used.
i. **Future**: Default to 0000000000.

xi. **Note to Buyer**: Any special instructions should be entered for Purchasing. Include anything that the buyer may need to know including the status of contract review with General Counsel.

b. **Approval Workflow**

i. **Funding Source Person**: The requisition will be electronically routed to the funding source person of the department segment entered for each Charge Account for compliance and budget review and approval.

ii. **Supervisor**: The requisition will be electronically routed to the supervisor of the employee that is entered as the Requester for strategic review and approval.

iii. **Principle Investigator (PI)**: The PI will be added to the approval workflow with project-funded transactions for review and approval.

iv. **Additional Approval Levels**: The requisition will be electronically routed to additional levels of approval for higher dollar amounts.

   (1) >$9,999: Department Head, Chair, Director
   (2) >$24,999: Dean, Associate Vice President
   (3) >$50,000: Vice President

v. **Modifying**: Approvers are able to modify the approval workflow to delegate, reassign, or add approvers in the approval workflow according to department business process.

c. **Review & Payment**: Purchasing will review each Requisition for compliance and approve or return these requests.

i. **Forms**: Confirm that all required forms are attached according to university policy and procedure.

ii. **Details**: Collaborate with departments to gather all information and approvals for the requisition.

iii. **Supplier**: Confirm and/or enter according to PO. Obtain Vendor Information Form, if necessary.

iv. **Approval**: Confirm all non-purchasing approvals are received and initiate Purchase Order approval workflow.

v. **Issue PO**: Purchase Orders are issued by Purchasing and sent to the Supplier and Requester.

vi. **Invoice Payment**: Accounts Payable will confirm receipt of goods or services prior to issuing invoice and payment.

4) **Supporting Documentation**
a. **Vendor Information Form**: Complete and email this form to Accounts Payable with taxpayer identification number (TIN) for entities that expect payment as a supplier for the university.

b. **Contract/Agreement**: Written contracts and/or agreements approved or drafted by General Counsel for a supplier.

c. **Supplier Quote**: Written quotes that include supplier information, item descriptions, and prices.

d. **Request for Sole Source Justification form**: Applies to purchases $10,000+. Complete and attach to requisition when requesting a sole source. Purchasing reviews and rejects/approves.

e. **Research Exemption for Scientific Equipment form**: Applies to purchases $10,000+. Complete and attach to requisition. Purchasing reviews and rejects/approves for research requisitions eligible for this bidding exemption.

f. **Excess, Salvage, or Trade-In Form**: Complete and attach to requisitions when trading in inventory items.

g. **Department-Specific Documentation**: Check with your business manager for additional department documentation requirements.

5) **Best Practices**

a. Ensure the Requester and Funding Source are correct prior to submitting to ensure standard approval workflow is correct.

b. Use keywords in the Item Description field to gather similar transactions in a search.

c. Attachments should not contain sensitive information such as Social Security numbers, banking or credit card account numbers, etc.

d. Attach all documentations to the top of the Requisition for ease of access to all attachments.

e. Notes to Buyer should include all relevant information for the transaction to proactively process the request.

III. **Additional References**

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<th>Link</th>
<th>Description</th>
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<td><strong>Oracle Financials Cloud (OFC)</strong></td>
<td>System</td>
<td>Expense Reports are entered in OFC for expense items, approval, and reimbursement.</td>
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<tr>
<td><strong>Vendor Information Form</strong></td>
<td>Form</td>
<td>Used to comply with IRS requirements for paying employee and non-employee entities.</td>
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<tr>
<td><strong>Request for Sole Source</strong></td>
<td>Form</td>
<td>Use this form to request sole source bids.</td>
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<tr>
<td><strong>Excess, Salvage, or Trade-In</strong></td>
<td>Form</td>
<td>Use this form to note excess salvage or trade-in inventory items.</td>
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<tr>
<td><strong>Request for Bidding Exemption of Scientific Equipment for Research</strong></td>
<td>Form</td>
<td>Provided by Purchasing for completion.</td>
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<td>Topic</td>
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<td>Creating and Submitting Standard Purchasing Requisitions</td>
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