1) After logging in, change to ALL CAPS.
2) Go to the Tree Menu (Left of screen):
   - Select Dept
   - Then select G. Requisition Entry
3) You will be directed to the Requisition File Maintenance Screen.
   - Click the Add New Record button (paper with the + on toolbar).
4) The Dept/Loc field should be automatically populated (highlighted in Blue). Do not change this value unless you are authorized to purchase items for other departments.
5) Tab through the following fields:
   - Fiscal Year
   - Requisition Number (highlighted in Blue)
6) When you reach the General Commodity Code:
   - Select a General Commodity code by clicking on the ellipses within the General Commodity Code field.
   - A list of commodity codes will come up. Select your commodity code by double clicking on the commodity code. You will be directed back to the Main screen.
   - Hit tab and the General Description field will auto fill with the description.
7) Hit tab again and the Status and Entry Date will auto fill.
8) Tab to the Needed By field.
   - Fill in a date or click on calendar icon to select a date.
9) General Notes replaced the Post-it Notes.
   - At least one General Note is required in all requisitions:
     - Name, Building, Room Number, & Mailstop.
       - The General Note is also used to communicate information that is helpful to you buyer to expedite the requisition such as Fax PO to Vendor; RUSH; etc. These types of comments must be entered on a separate Note than the delivery information.
     - Click the General Notes button.
     - Click the Add New Record button (paper with the + on toolbar).
       - The Requisition; Date/Time; and Created By fields will auto fill. Your mouse will be positioned in the Notes Line field.
     - Add your note, and then accept it by clicking on the Green Check (Top Left corner).
       - To add another note, click Add New Record button (paper with the + on toolbar) and repeat same as above.
     - When you have accepted your last note:
       - Close the General Notes screen by clicking on the Red Box with the X in it (Top Right corner of screen).
       - You will be directed back to the Requisition File Maintenance Screen
10) Tab to the **Vendor** field.
   - Select a vendor by clicking on the **Ellipses** within the **Vendor Number** field.
   - You will see **Vendor Help** dialog box.
   - Type the first several characters of the vendor’s name or type in the entire vendor name (this must be entered in **ALL CAPS**).
     - A listing of vendors that matched the spelling you entered will appear. Double click to select the vendor that you will be using.
       - If the address displayed is not the one you need click on the **Ellipses** just after the vendor number. The **Vendor Address Help** screen will come up. Select the correct address by double clicking on it.

11) If your Vendor is not listed, please let us know by **Importing** a note in the **Vendor/Sourcing Notes**.
   - Click on the **Vendor/Sourcing Notes** button.
   - Click on the **Import** button (Left of screen).
   - The **Requisition Notes** screen will appear.
   - Select **New Vendor (#4581)** by Double Clicking that line.
   - Click the **Update the Current Record** button (paper with the pencil; on the Toolbar).
     - Fill in the requested fields.
       - Make sure the Vendor Application & W-9 Forms are sent to the Vendor. (You can get these forms on our Website at: [http://purchasing.unlv.edu/PDF_Files/NEw%20Vendor%20App%201.30.07.pdf](http://purchasing.unlv.edu/PDF_Files/NEw%20Vendor%20App%201.30.07.pdf)
       - When the fields are complete, accept the note by clicking on the **Green Check**.
     - Close the **Vendor/Sourcing Notes** screen by clicking on the **Red Box with the X in it** (Top Right corner of screen).

12) You will then return to the **Requisition File Maintenance** screen.
   - The **Entered By** and **Ship To** will be populated with default values.

13) Tab to the **Reference** field.
   - Fill in with the name of a **Contact Person** from your dept. and their full **Phone Number including area code**. This will be printed on the PO.

14) Press the tab key to get to the **Terms/Miscellaneous** Tab.

15) Tab through the following fields (no entry required in these fields):
   - **Discount %**
   - **Freight %**

16) The **Method/Terms** field will default to **Net 30 Days**.
   - This should remain unless you need a Cash With Order or Auto Payment Schedule.
     - If so, delete the **Net 30 Days** wording and type in CASH WITH ORDER or AUTO PAYMENT.

17) Tab to the **Bill To** field.
   - This will default to your Mail Stop.
     - If you need to change the Mail Stop, click on the ellipses and a listing of valid Mail Stop codes will appear. (If you are unsure,
leave it on the default value). This is an important step as this Mail Stop code will be used to ensure your invoices are mailed to you directly and NOT Accounts Payable.

18) Tab through the following fields (no entry required in these fields):
   - Special Handling (it defaults as N-NONE)
   - Allocation field
   - Buyer field
   - Review field
   - Type (it defaults as N-NORMAL)
   - Notify originator when converted to PO
   - Notify originator of overages
   - Contract Number
   - Work Order

19) The Line Detail screen will appear.
   - Enter your Quantity.

20) Tab to Commodity.
   - Click the Ellipsis and the commodity you used in Main Tab will appear in the Commodity Help Screen. Click the Green Check (Top Left of the Commodity Help Screen).
   - A Commodities Screen will appear.
   - Select the Object Code and the Sub Object Code that best fits your purchase by Double-Clicking it. Example: 0131-30-E1

21) Tab through the Item field.
22) Enter the Unit Price and Unit of Measure (example: LOT, EA, MO)
23) Tab through:
   - Freight
   - Discount Percent (If Discount Percentage by vendor is given, then enter here)
   - Credit

24) Enter the Line Item Description (IN ALL CAPS). This must be a complete description of the item you are purchasing (part name, number, and item description). For multiple items you must use multiple lines on the requisition.

25) Tab through all remaining fields until you get to the Account field.
   - Enter the Account Number you want to use. Enter in the fund, the agency, the organization number followed by .00, then the object code. (example 2221-208-0870.00-30)
   - Tab until the amount is highlighted (on the Account line). Due to our current financial systems only one account may be used per line item
   - Click on the Accept icon (the Green Check) to accept this line item.

26) You will remain on the Line Item Detail screen. You may do one of the following:
   - Update the information you have entered by clicking on the Update the Current Data button (paper with pencil; on the Toolbar).
   - Add a second line item to your Requisition by clicking on the Add icon (paper with +; on the Toolbar).
   - Accept the information by clicking on the Accept icon (Green Check).
     - Close the Line Detail screen by clicking on the Red Box with the X in it (Top Right corner of screen).
• You will be directed back to the **Requisition File Maintenance Screen**.

• If you get an **Error Message** (Error Messages show at the Bottom Left of your screen), you may be using an account with insufficient funds.
  - Use a different account or wait another day (remember MUNIS is one day behind ADVANTAGE).

27) **Attach** necessary documentation such as Vendor Applications; W-9; Quotes and Competitive Exception forms by clicking on the **Paper Clip icon** (at Top of your screen, on the toolbar).

28) Click on the **Release** button (at Left Side of screen) to send the Requisition to the appropriate Approvers.

29) Click on the **Approver** button (at Left Side of screen) in order to view the approval status of your request (if applicable).