Create an Amount Only Requisition
060-02-08

The following topic will demonstrate how to create an Amount Only requisition. Amount Only orders are typically used for goods that are ordered / delivered on a regular basis. Examples of this include purchases of food items by the Conference & Catering or Hospitality areas, or newspaper and milk deliveries to all areas of the University.

Important: DO NOT USE THIS SYSTEM FOR INDEPENDENT CONTRACTORS

If you have an enquiry regarding setting up an independent contractor purchase order, please email finance@ballarat.edu.au.

All purchases of goods or services supplied to the University must be made either via an authorised purchase order or University purchase card. In order to create a purchase order, a requisition must be raised first.

Requisitions can be entered into myFinance at any time, but are not dispatched until they have been approved. Note: it is important to be aware of your financial delegation and transaction limits.

Always remember to ‘Save & Preview’ the approvals before submitting a requisition to ensure you do not accidentally exceed your delegation transaction limits. Once approved, a requisition is automatically sourced and despatched. This automatic process runs twice daily (at approximately 10am and 3pm).

Upon completion of this lesson, learners will be able to:
• Navigate to the create requisitions area within myFinance
• Define requisition information that applies to the entire requisition
• Add items and services and vendor (supplier) information
• Specify that it is an Amount Only requisition
• Specify a Ship To address and Accounting Details
• Submit the requisition for Approval
Procedure

To create an amount only requisition:

1. In the Left-Menu, click the eProcurement link.

2. Click the Create Requisition link.

3. Enter the Requester name into the Requester field.

4. Enter a Requisition Name.

**Hint:** You should ensure that your Requisition Name is intuitive and meaningful so that later on when you search through the list of requisitions you have created, you will be able to quickly identify what each requisition is for just by viewing the Requisition Name. For example, if you are creating a monthly requisition for the purchase of food items from Safeway, an appropriate requisition name would be ‘Safeway January 2012’.

5. Click the Continue button.

6. Click the Special Request tab, then click the Special Item link.

7. Enter a description into the Item Description field.

8. Enter the GST-exclusive price into the Price field.

9. Enter the quantity into the Quantity field.
Hint: Even though you are creating an Amount Only requisition, you must still include a Quantity as it is a mandatory field. Later on when you inform the system that this is an Amount Only requisition it will override (or ‘grey out’) the quantity entered.

10. Enter ‘ea’ into the Unit of Measure field.

Hint: When you are creating a requisition it is important that you select the appropriate Category for your purchase. For example, if your order is for food items, select the ‘Food Beverages & Tobacco Items’ Category.

11. Click the Category Lookup button.

12. Use the dropdown box to change the Search Operator to Description.

13. Type in all or part of category description into the Search Categories field and click the Find button to return a list of search results.
14. Click on the appropriate category for your purchase. You will be returned to the Add Items and Services page and the Category field will be populated with your selection.

15. Use the Vendor Lookup button to search for and select the vendor.

16. Use the Additional Information field to add comments or important messages to the requisition; for example, delivery instructions, or to advise that the goods will be picked up. Remember to click the Send to Vendor option to ensure these notes are printed on the Purchase Order.

17. Click the Add Item button.

18. Click the 3. Review and Submit link.

19. To specify that the requisition is ‘amount only’, click the Line Details button.
20. Tick the **Amount Only** checkbox.

21. Click the **OK** button.

22. A message will appear to inform you that the Quantity will be set to 1 and greyed out for the line that you have selected in the requisition. Click the **Yes** button.
Create an Amount Only Requisition
060-02-08

23. Click the **Expand Section** button.

Enter the **Ship To** address (type directly into this field, or use the **Look Up** button to search for your area), and the **Accounting Details**.

**Hint:** If you are picking up the items in person **you must still complete the Ship To field.** This is a mandatory field and the system won't let you save your requisition if it is not filled in.

24. Click the **Save & preview approvals** button.

25. If necessary, include any **Ad-Hoc Approvers** (if you are unsure how to do this, please refer to ‘Create a Requisition for an Asset -Includes Ad-Hoc Approvals’ in the eProcurement – Basic Learner Guide for detailed instructions).

26. Click the **Submit** button.

**End of Procedure.**