eProcurement Requisition – Services – Special Request – Amount Only

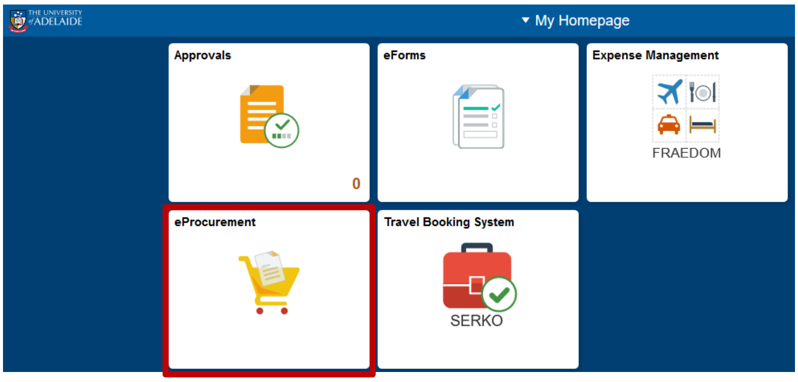
Introduction

Follow this guide to create a Requisition for a **service** or **consultancy** from a supplier where the service or consultancy are not listed in any of the University internal or online eProcurement catalogues. To create a Special Request for an item refer to the QRG eProcurement Requisition – Special Request – Goods.

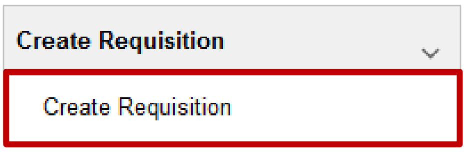
For additional support in creating a Special Request for Services, please refer to the interactive guide for Equipment Repair.

Procedure

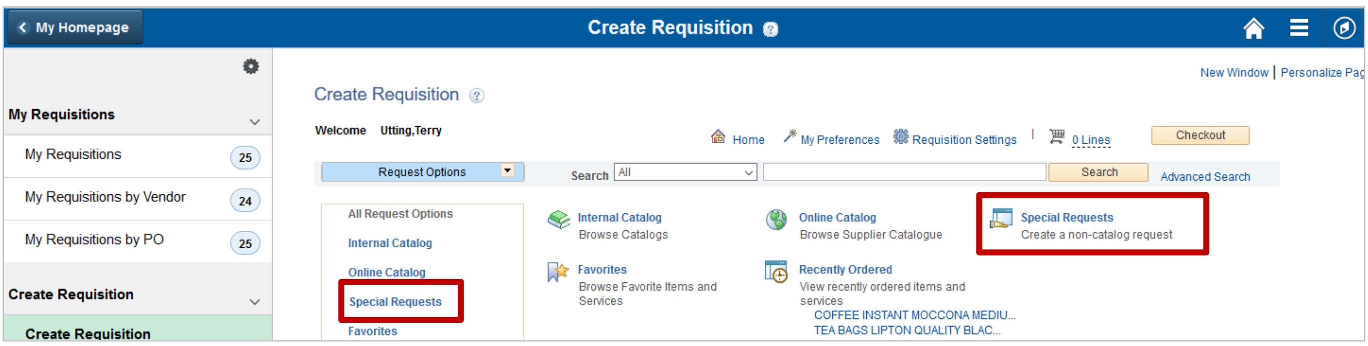
1. From the Finance homepage click the **eProcurement** tile



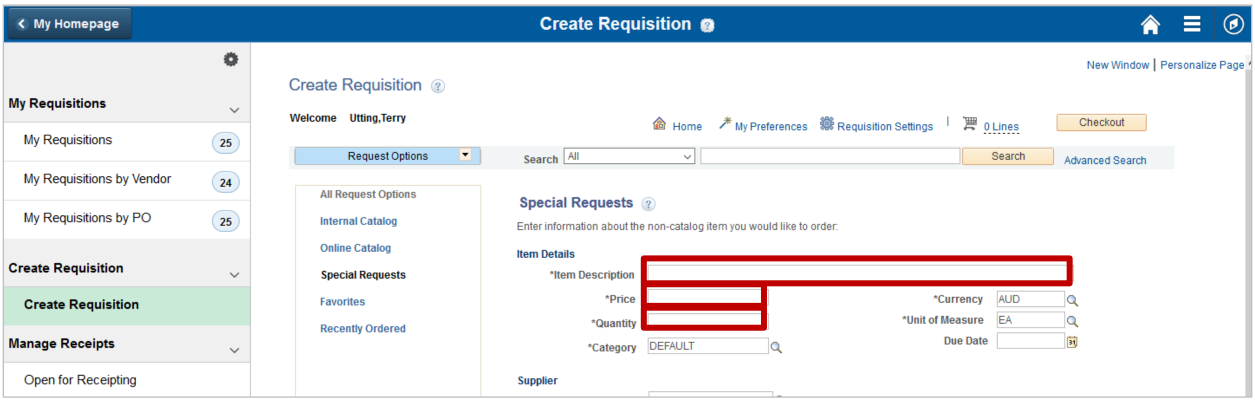
2. Under the Create Requisition heading in the left hand menu click **Create Requisition**



3. Click on **Special Requests**



4. Complete the **Item Details** fields relating to the service or consultancy. Fields with an asterisk '*' must be completed. Provide the following information:
   - **Item Description** – This is a description of the service or consultancy you are procuring
   - **Price** – This is the cost of the service or consultancy excluding GST
   - **Quantity** – Place a '1' in this field unless the service is being provided multiple times



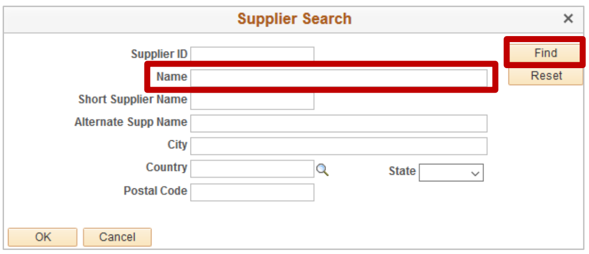
Note: only complete the following fields if required:

- **Category Code** – If you are unsure of the category code you can leave it at the default of DEFAULT. Alternatively you can search for the category by clicking the icon
- **Currency** – This will default to Australian dollars AUD. Only adjust this as required
- **Unit of Measure** – This will default to each EA. Only adjust this as required
- **Due Date** – You are not required to complete this field

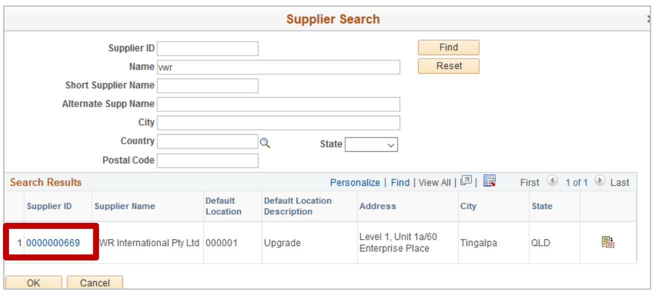
5. Add the **Supplier ID**

   Note: If you are not sure of the suppliers ID number or cannot find it by searching, leave this field blank and add any relevant information about the supplier in the Additional Information field below. To search Click the icon

In the pop-up window type the suppliers name and click **Find**

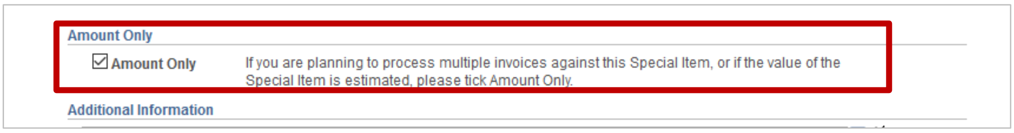


From the pop-up window click the blue **Supplier ID** to add the details to your requisition



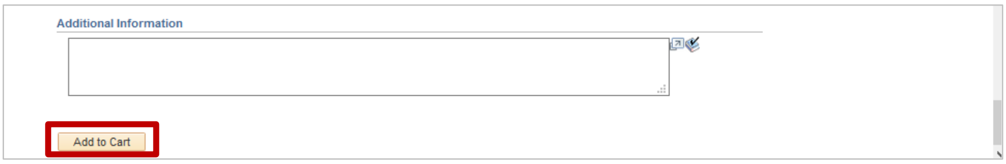
6. Tick **Amount Only** if your requisition is for a service, such as a consultancy, repair or analysis.

   Note: this will set the Amount field at 1 and it will no longer be editable

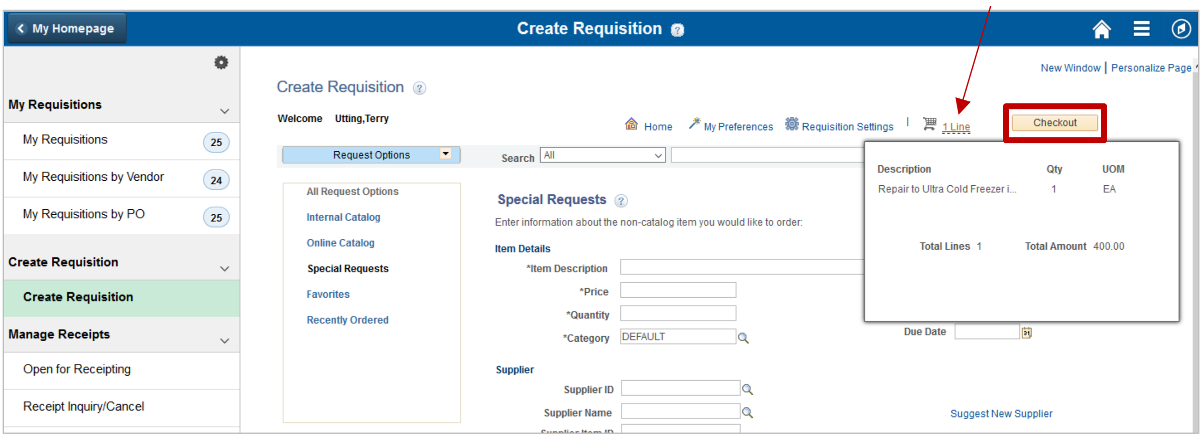


7. Add **Additional Information** if required. This information is a message from you to the Purchasing Team. You could provide a reference to an attached quote, additional supplier information, special delivery instructions or further information relating to the service or consultancy

8. Click **Add to Cart**

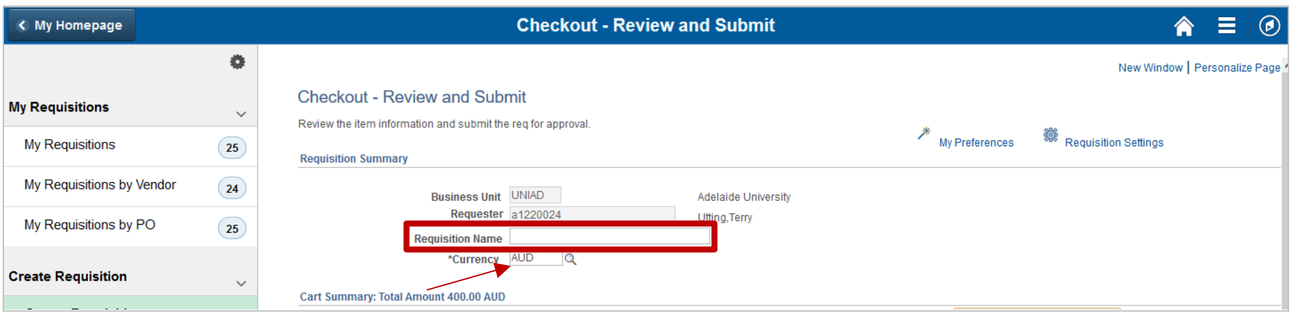


9. You will notice that the cart now lists **1 Line**. If you have additional items to add, repeat the steps above starting from the Item Details. If you have finished, click **Checkout**

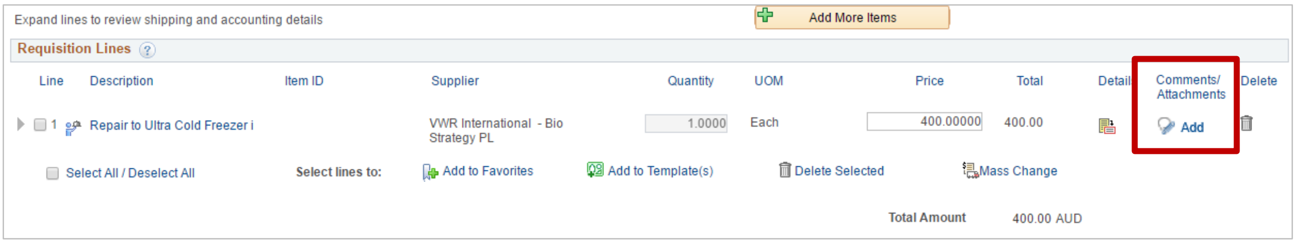


10. Add a **Requisition Name**. The name should relate to the service or consultation you are requesting.

    Ensure the currency is set at AUD



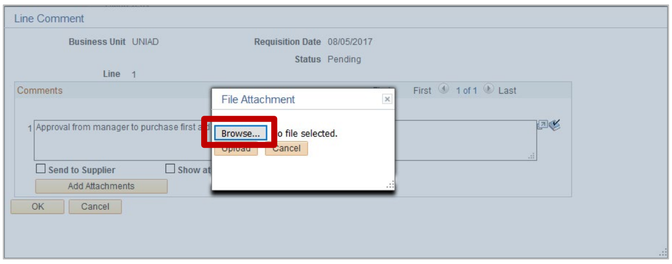
11. If you have supporting documentation or additional comments in relation to your request you can add them by clicking **Add** (if you have already added comments or a document it will say Edit)



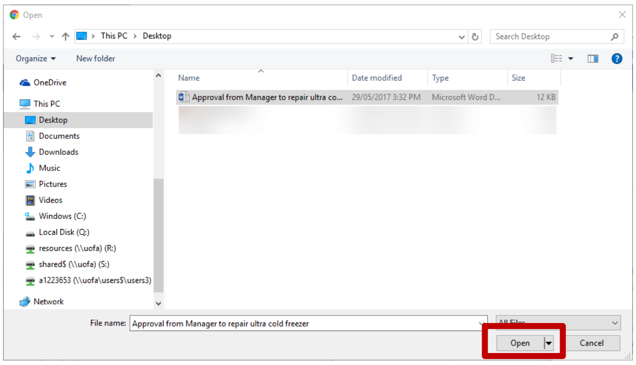
A pop up window will appear. This will include your previous comments from the additional information field. Your comments here can be edited if required

Click **Add Attachments**

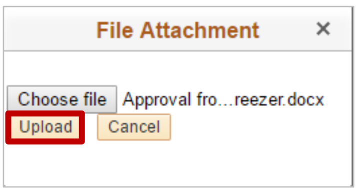
Browse to find your document



Select the document and click **Open**



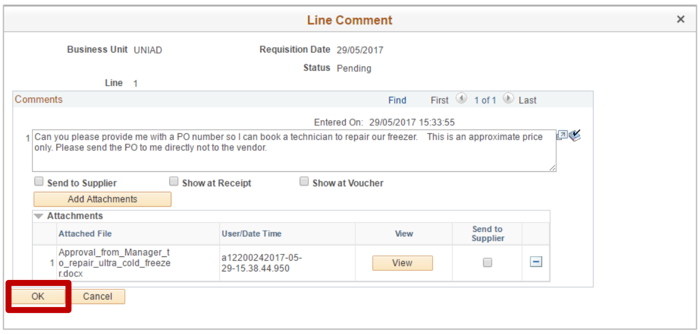
In the pop up window click **Upload**



Review the file name to ensure you have selected the correct one.

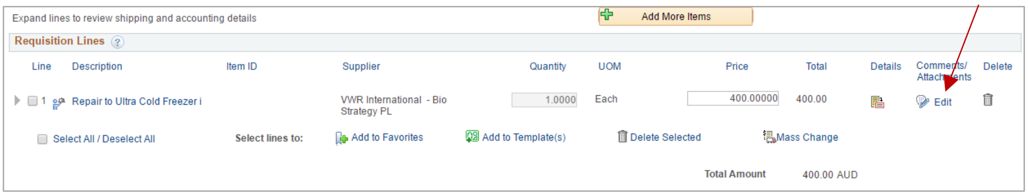
If you are adding additional documents click **Add Attachments**

When you have added all relevant comments and documentation click **OK**

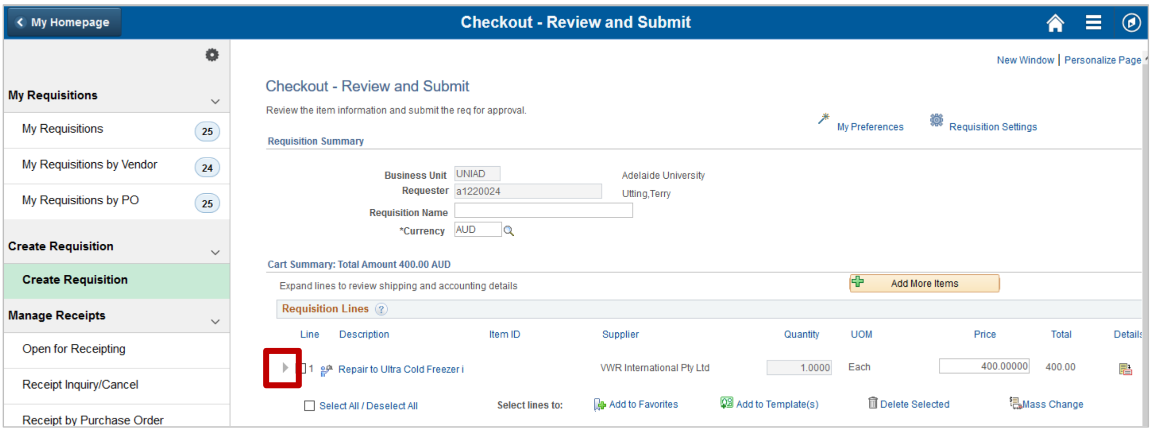


This will return you to the **Checkout - Review and Submit** page

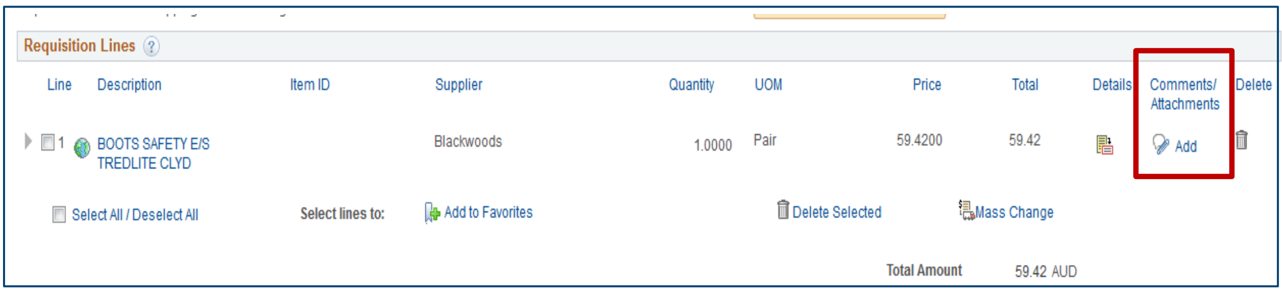
Note: If you need to review your attachment click on the **Edit** icon



12. Prior to submitting your request, review your requisition. Click on the ▶**arrow** next to the item's requisition line to expand the view



13. If you require to add further comments or change Ship To information different from your default profile, enter in the comments field where you add attachments on the requisition page

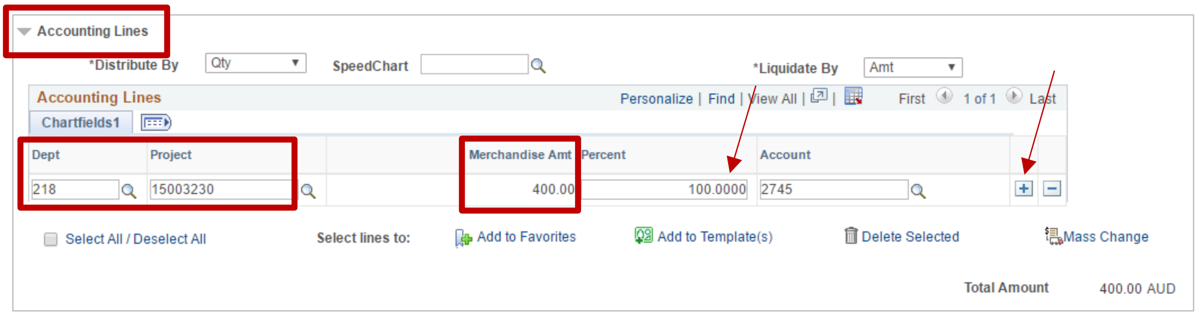


14. Click the ▶**arrow** next to accounting lines and review the following details:

- **Department ID (Dept)** – The default ID will be based on your original request to access the finance system. If the service or consultancy you are requesting belongs to an alternate department change the code
- **Project Code -** The default project code will be based on your original request to access the finance system. If the service or consultancy you are requesting belongs to an alternate project change Project number. If the request is to be split across multiple projects, you can identify this in the **Percent** field. An additional line will need to be added by clicking the **+** icon
- **Merchandise Amount** – ensure this is the correct amount

  Note: Your tabs may look different to the image below according to your personalization. If you cannot see the above details, click through the Chartfields tabs. If you want to personalize your Chartfileds1 tab, refer to the personalization QRG.

  You do not need to change or delete any other pre populated field such as the Activity ID field

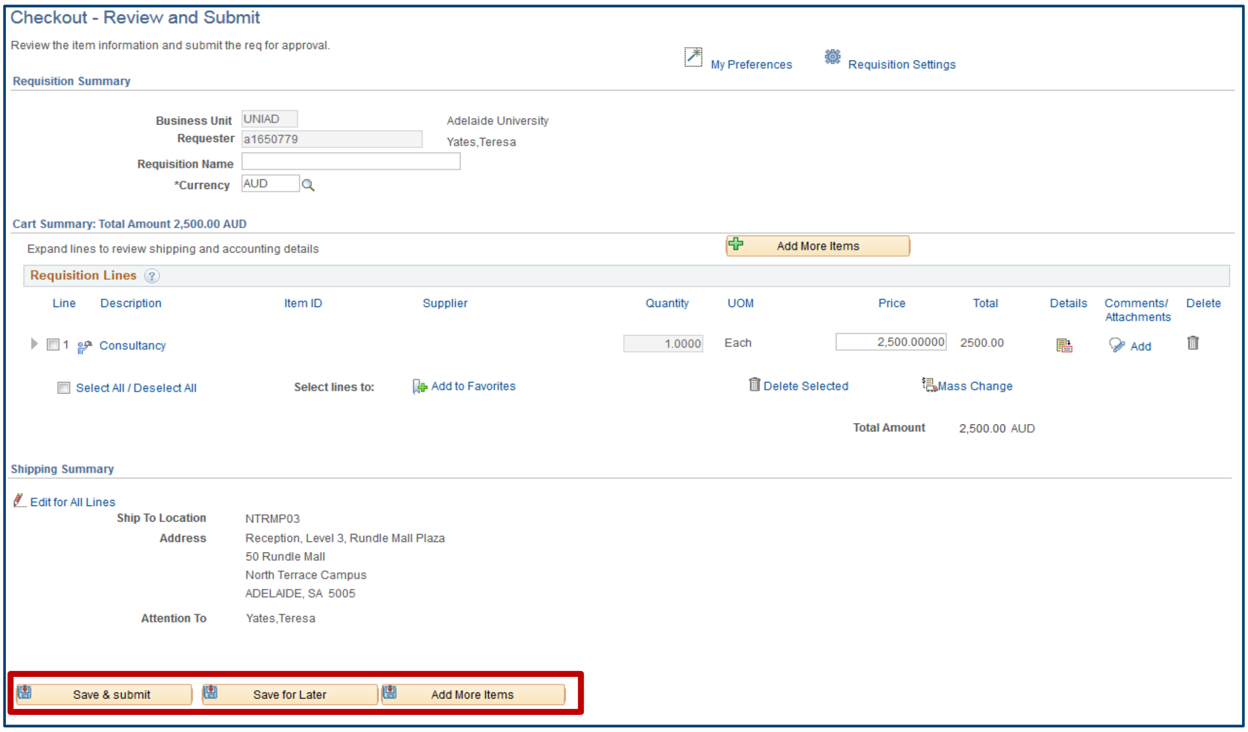


15. If you have completed your request, click **Save & Submit**

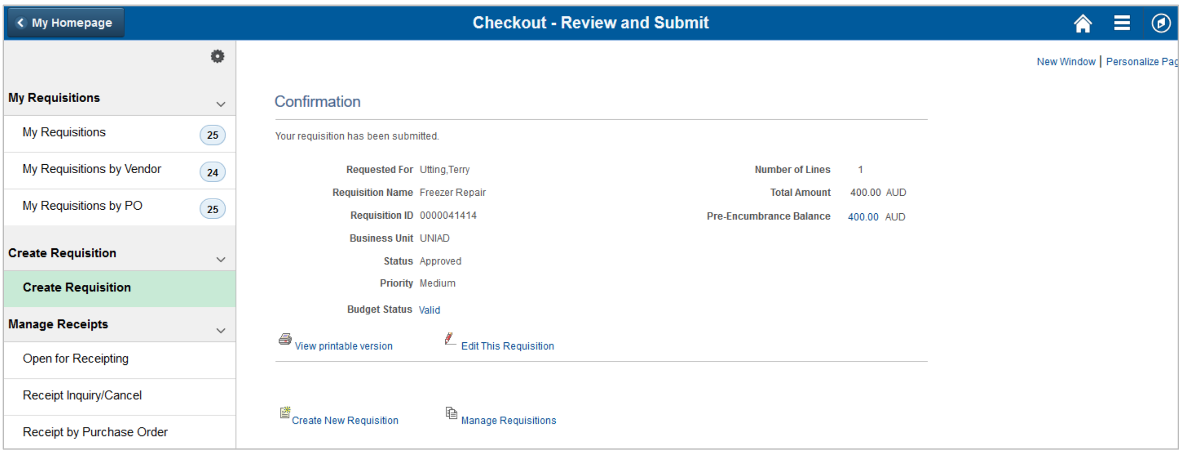
Note: If you want to continue working on your request at a later time, click **Save for Later**.

You must complete each requisition within the calendar month it was first created

If you want to add additional items to your request, click **Add More Items**



16. You will see a **Confirmation** message when your request has been submitted



Note: Your request will be reviewed by the Purchasing Team prior to a Purchase Order being created. You can follow the status of your request through the Manage Requisition function.

Contact Us

For further support or questions, please contact the Finance and Procurement Support Team.
Telephone: +61 8 8313 3414 Email finprosupport@adelaide.edu.au