For employees preparing a purchase requisition for another requester.

Purpose:	Prepare a purchase requisition for another requester.
How to Access:	Log into the Stratus application. Select the Procurement task in the Navigator.
Helpful Hints:	Be sure to keep in mind thatSupporting documents and other necessary information can be attached.
Procedure:	Complete the following steps to prepare a purchase requisition for another requester:

1. Select **Procurement Module** using the hamburger menu or the sliding task bar in the center of the screen.

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Good morning,							
Fixed Assets Expenses	Procurement My Enter	rprise Tools	Configuration C	Others	-		
QUICK ACTIONS	APPS						
Process Requisitions			Б	Ē			
Manage Orders	Purchase Requisitions	Purchase	Purchase Orders	My Receipts			
Manage Agreements	Requisitoris	, groomano					
🚔 Manage Buyer Assignment Rul	es 🔐	+					
للأج Manage Procurement Agents	Suppliers	Ι					

2. Click on the **Purchase Requisitions** Icon.





3. On the Purchase Requisitions page, under **Request Forms**, select the type of form you would like to create. (**Note**: for this example, we will select "Requisition for Fixed Price Services")

Purchasing News		
Per <u>TU 08-03.00</u> , Procurement Policy, invoices for goods and services exceeding to the <u>USM Procurement Policies and Procedures</u> . Requisitions shall be submittee Representative assigned to the purchase to process in a timely manner. Please no	\$5,000 will not be paid without a purchase order, and shall be made in J prior to the required dates for both goods and services. Please attact te, depending on the value and nature of the purchase, a competitive	accordance with Towson University Procurement Policies and Procedures, unless specifically excluded, pursuant h any quotes, proposals, software contracts, specifications, etc., that will help the Procurement Office solicitation may be required.
For purchases \$5,000 and below, the using department shall utilize the University The Procurement Department have established the following requisition templates	s Procurement Card Program. For information on how to apply for a P	Procurement Card, please visit the <u>Procurement Card Program website</u> .
Request Forms Independent Contractor Request Requisition for Fixed Price Goods	Requisition for Fixed Price Services Requisition for Goods by Quantity	Requisition for Rate Based Services
Recently Viewed		

4. On the **Create Request** page, fill in the fields to complete your requisition.

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■ TU STRA'	TUS						☆ ∆	ΡÔ	EC
Create Request: Requisition	for Fixed Price Services ⑦					Add to Shopping	List Add to Car	t Done	` <u>₩</u> 1
Request Type	Requisition for Fixed Price Service: \checkmark								
Use this form when you want to order a service of	or complete a project for a fixed price. The price	will be the lump sur	im or not to exceed	amount required to render the	e service or complete th	ne project. Please include desired start and	l completion dates.		
Line Type	Fixed Price Services				Agreement				
* Item Description		1.				New supplier	0		
* Category Name	Q				Supplier Supplier Site		Q		
* Amount Currency	USD				Supplier Contact	~			
,					Phone				
					Fax				
					Email				
					Supplier Item				
Attachments									
View * * X	File Name or LIRI	Title		Description	Attached By	Attached Date			

5. In addition to filling in the fields, you'll also need to add supporting documents under **Attachments**. Use the **Category** field to route your attachments to the buyer.

Create Request: Requisition	for Fixed Price Services ⑦				Add to Shopping List	Add to Cart	Done	`∰ 1
Request Type	Requisition for Fixed Price Service: V	e lumo sum or not to exceed -	amount required to render the	service or complete th	ne project. Please include desired start and cou	moletion dates		
Line Type	Fixed Price Services	ie famp sam of not to exceed t	amount required to render the	Agreement		npietion dates.		
* Item Description	Maintenance Services for Grounds				New supplier	_		
* Category Name	Maintenance Services Grounds Q			Supplier	Brawner Builders, Inc Q			
* Amount	200.00 USD			Supplier Contact				
Survioy				Phone				
				Fax				
				Supplier Item				
Attachments								
Type Category *	* File Name or URL	Title	Description	Attached By	Attached Date			
File V Internal to Rec V	Maintenance for Grounds Quote .docx Update	Maintenance for Grounds		Erin Cavrak	3/29/22 11:50 AM			

6. When you are finished filling in the fields for your requisition, click the "Add to Cart" button in the upper right corner. You will notice the **shopping cart icon** to the right of the "Done button" should now have a "1" next to it.

d to render the service or complete the project. Please include desired start and completion dates. Agreement New supplier Supplier Supplier Site Phone Fax Email Supplier Item	
d to render the service or complete the project. Please include desired start and completion dates. Agreement New supplier Supplier Supplier Contact Phone Fax Email Supplier Item	
Agreement New supplier Supplier Supplier Site Supplier Contact Phone Fax Email Supplier Item	
New supplier Supplier Supplier Contact Phone Fax Email Supplier Item	
Supplier Q Supplier Site Supplier Contact Phone Fax Email Supplier Item	
Supplier Site Supplier Contact Phone Fax Email Supplier Item	
Supplier Contact Phone Fax Email Supplier Item	
Phone Fax	
Fax Email Supplier Item	
Email Supplier Item	
Supplier Item	
Add to Shopping List Add to Car	rt Done
Maintenance Services for Grounds \$200.00	or \$ 20
d to render the service or complete the project. Please ac Total \$200.00	
Agreement Review Subm	it
Agreement Review Subm	it
Agreement Review Subm	it
Agreement Review Subm Supplier Q Supplier View View Subm	it
Agreement Review Subm Supplier Q Supplier Ste Supplier Contact V	it
Agreement Review Subm Supplier Q Supplier Ste Supplier Contact V Phone	it
Agreement Review Subm	it
Agreement Review Subm	it
	Attached By Attached Date

8. On the "Edit Requisition" page, scroll down to the line details and enter the Requester's name in the box labeled Requester.

Total	200.00	
Rows Selected 1 Columns Hidden 7		
Line 2: Details		
Delivery		
* Reguester Sutton, Jeffery	* Deliver-to Location Towson University Q	
Urgent No 🗸	Deliver-to Address F8000 York Road, United States, Towson, MD 21253	2, Baltimore
Requested Delivery Date 4/19/22		
Billing		
▲ Billing View ▼ Format ▼ 🗙 << 🎯 Freeze 📓 Detach 📣 Wrap	p	
▲ Billing View ▼ Format ▼ X -C III Freeze III Detach ↓ Wrap Charge Account	P * Budget Date * Percentage Amount (USD) Funds Status	Del
▲ Billing View ← Format ← ★ < Image Preeze Image Preeze <th< td=""><td>P * Budget Date * Percentage Amount (USD) Funds Status 4/12/22 100 200.00 Not reserved</td><td>Del</td></th<>	P * Budget Date * Percentage Amount (USD) Funds Status 4/12/22 100 200.00 Not reserved	Del

9. If needed, use the lookup to find the employee's exact name. Highlight the employee's name and click OK to insert them as the requester.

otal					200.00		
Selected 1	Columns Hidden 7 earch and Select: Requester					×	122
2: De	4 Soorah					Basia	
verv	Search				** At least c	one is required	
	** Name Contains	✓ Joselyn					
	** Department Starts with	~					re
	** Job Starts with	~ [
Re	** Email Starts with	~					
ng	** Phone Starts with >]				
▼ For				Sa	arch Resot Add Fields ¥	Peorder	
harge				360	Add Heids +	Reorder	elete
020-20	Name	Department	Job	Email	Phone		
	Johnson, Joselyn	18950-Procurement	Default Project Job	INVALIDjmjohnson@	@towson.edu		
							1
es and					C	Cancel	

10. When you are finished reviewing your requisition, click the "Submit" button in the upper right corner.

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Edit Requisition: REQ0000039 ⑦			Shop	eck Funds Man	age Approvals View PDF	Save	Sub <u>m</u> it
Requisitioning BU Towson University * Description Maintenance Services for Grounds	Justification		4		Requisition Amount	200.00 USD	
á.		Emergency purchase order number 100 Emergency purchase order 100 Emergency purchase order 100 Emergency purchase order 100 Emergency purchase order 100 Emergency purchase	er required		Funds Status I Attachments N	Not reserved	
Requisition Lines Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line. Actions = View = Format = Image Actions = View = Image Actions = Image							
Line Description	Category Name	* Quantity UOM Name	* Price	* Amount	Amount (USD) Funds Stat	ls I	Delete
1 Maintenance Services for Grounds	Maintenance Service			200.00 Ut	200.00 Not reserved		×
Total					200.00		
Rows Selected 1 Columns Hidden 7							

Delivery

Delivery

<u>NOTE</u>: If you are not ready to Submit your requisition, you can click "Save and Close" and return to the requisition at another time to complete and submit.

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Edit Requisition: REQ0000039 ⑦			Shop Cl	neck Funds M	anage Approvals View PDF	Save Sub <u>m</u> it
Requisitioning BU Towson University	Justification				Requisition Amount	200.00 USD
* Description Maintenance Services for Grounds			1		Approval Amount	200.00 USD
h		Emergency purchase order number	per required		Funds Status	Not reserved
					Attachments N	one 🕂
Requisition Lines						
Use Shift or Control Key to select multiple rows and click Edit Multiple Lines to edit more than one line.						
Actions 🔻 View 🔻 Format 👻 🔳 🖋 💥 💷 Freeze 📓 Detach 斗 Wrap						
Line Description	Category Name	* Quantity UOM Name	* Price	* Amount	Amount (USD) Funds State	us Delete
1 Maintenance Services for Grounds	Maintenance Service			200.00 Ut	200.00 Not reserved	×
Total					200.00	
Rows Selected 1 Columns Hidden 7						
▲ Line 1: Details						

NOTE: If there are no funds available for the requisition you submit, a box will indicate that and you will have the option to request an override.