# Purchasing – Creating a Requisition for FY 25

For employees creating a purchase requisition for FY 25

Purpose:	Create a purchase requisition for the Fiscal Year.
How to Access:	Log into the Stratus application. Select the **Procurement** task in the Navigator.
Helpful Hints:	Be sure to keep in mind that… • Enter **7/1/2024** in the Budget Date field • Supporting documents and other necessary information can be attached. • Advanced Search and View Option instructions can be found in the Appendix at the end of this document.
Procedure:	Complete the following steps to create a purchase requisition:

1. Select **Procurement Module** using the hamburger menu or the sliding task bar in the center of the screen.
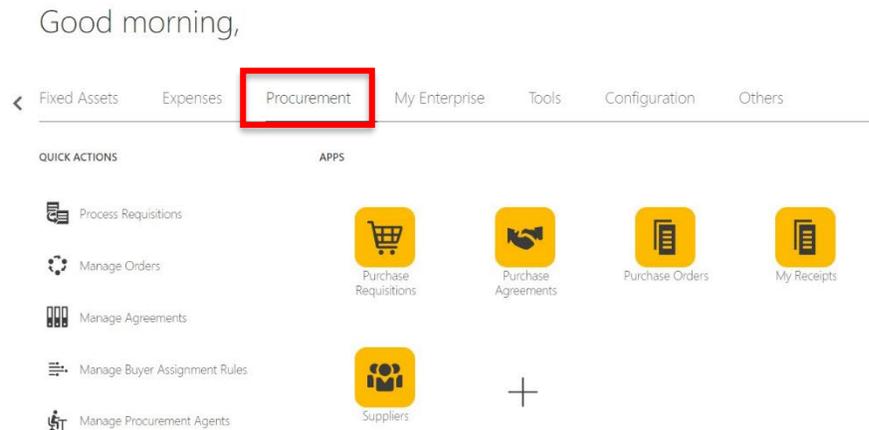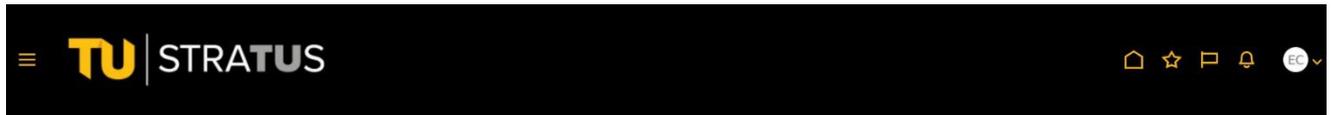
2. Click on the **Purchase Requisitions** Icon.
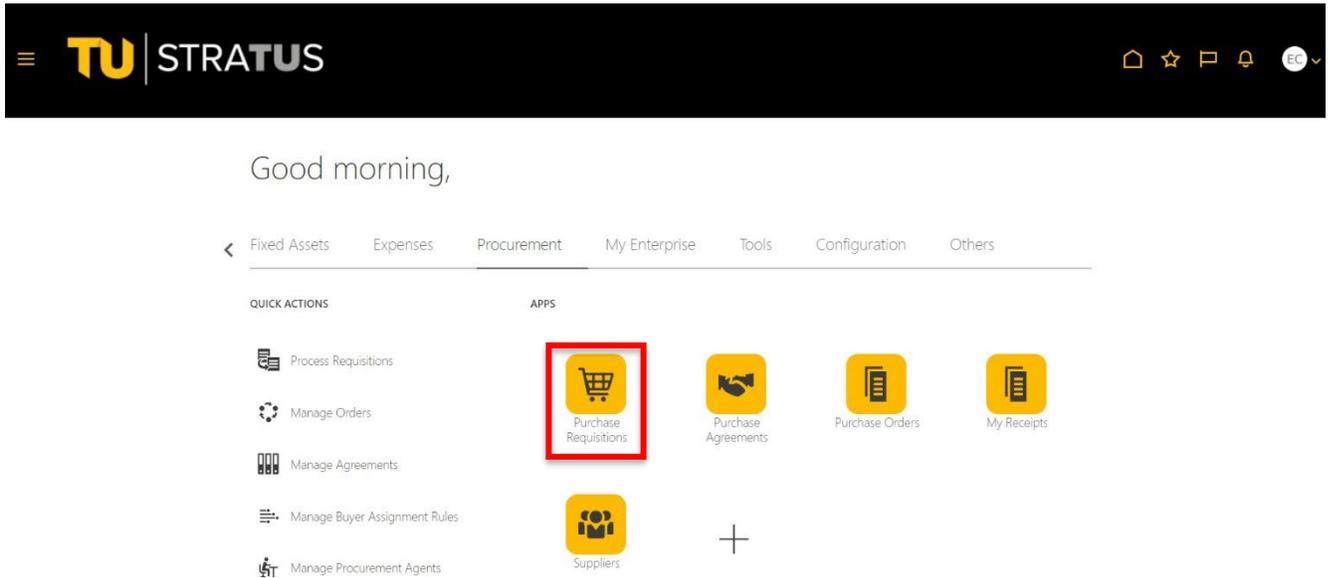
3. On the Purchase Requisitions page, under **Request Forms**, select the type of form you would like to create. (**Note**: for this example, we will select "Requisition for Fixed Price Services")

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

   NOTE: To use the Advanced Search feature to find a Category Name, refer to the appendix at the end of this document.

5. In addition to filling in the fields, you can also add supporting documents under **Attachments**. Use the **Category** box to route your attachment to the buyer.

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.

7. Click on the shopping cart icon to review your requisition.

8. On the **Edit Requisition** page, you can edit your requisition and add additional information, such as charge account, split it between cost centers, etc.

9. Enter the "**7/1/2024**" in the Budget Date

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

NOTE: If you are not ready to Submit your requisition, you can click the arrow next to **Save** to **Save and Close** and return to the requisition at another time to complete and submit.

11. You will then be routed back to the Purchase Requisition page, where you can review your recent requisitions using either **Recent Requisitions** or **Manage Requisitions**. Under the **Recent Requisitions** section, you can monitor where your requisition is at in the approval process by clicking "Pending approval" next to the requisition you would like to view. (NOTE: Refer to the appendix at the end of this document for options on customizing your screen display in Stratus.)

12. **NOTE:** Also using **Recent Requisitions** or **Manage Requisitions**, you will find any incomplete requisitions. To continue editing a requisition in progress, click the requisition number. Use the drop-down labeled **Actions** and select **Edit**. Make the necessary changes and when you are finished, click **Submit**.

13. This will take you to a page where you can view the approval workflow for a specific requisition.

NOTE 1: Change orders to FY 24 Purchase Orders utilizing FY 25 funds are not permissible at this time. Once year end close out occurs and FY 24 Purchase Orders are "carried forward" to FY 25, this type of change order will be able to be processed at that time.

Appendix – Using View to Customize What Your Screen Displays
This section will show how to use the View dropdown to customize what you see on your screen

1. On the Manage Requisitions page, use the search to display the requisitions you want to review.
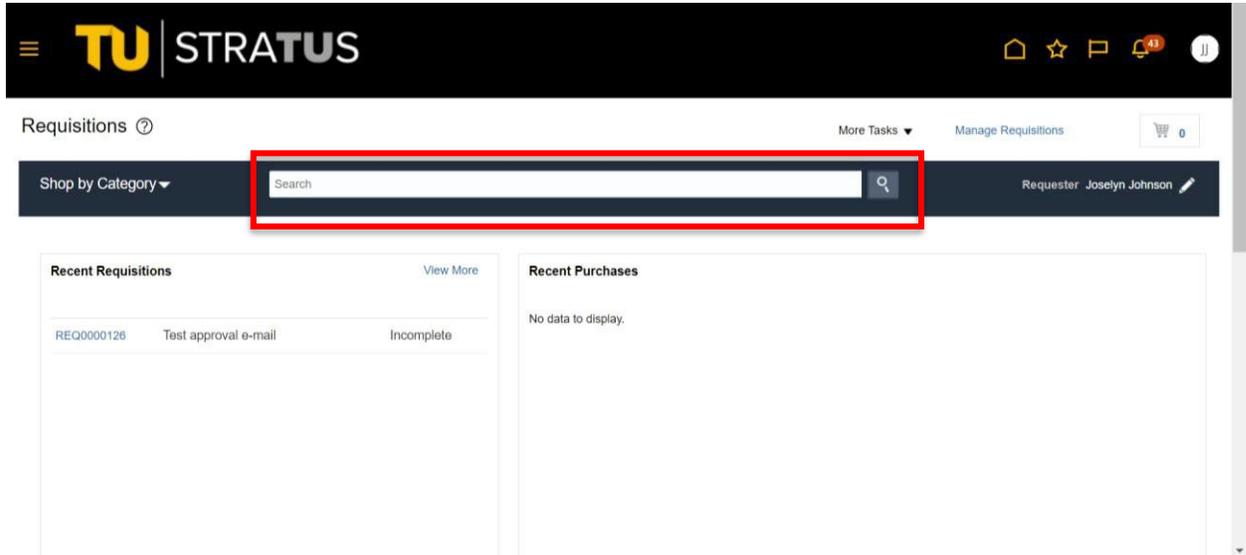
2. The system returns your list of requisitions displaying the Requisition Number, Description, Creation Date, and so forth displaying the information from left to right. Now we will use the View dropdown to customize the screen to our needs. Click on View.
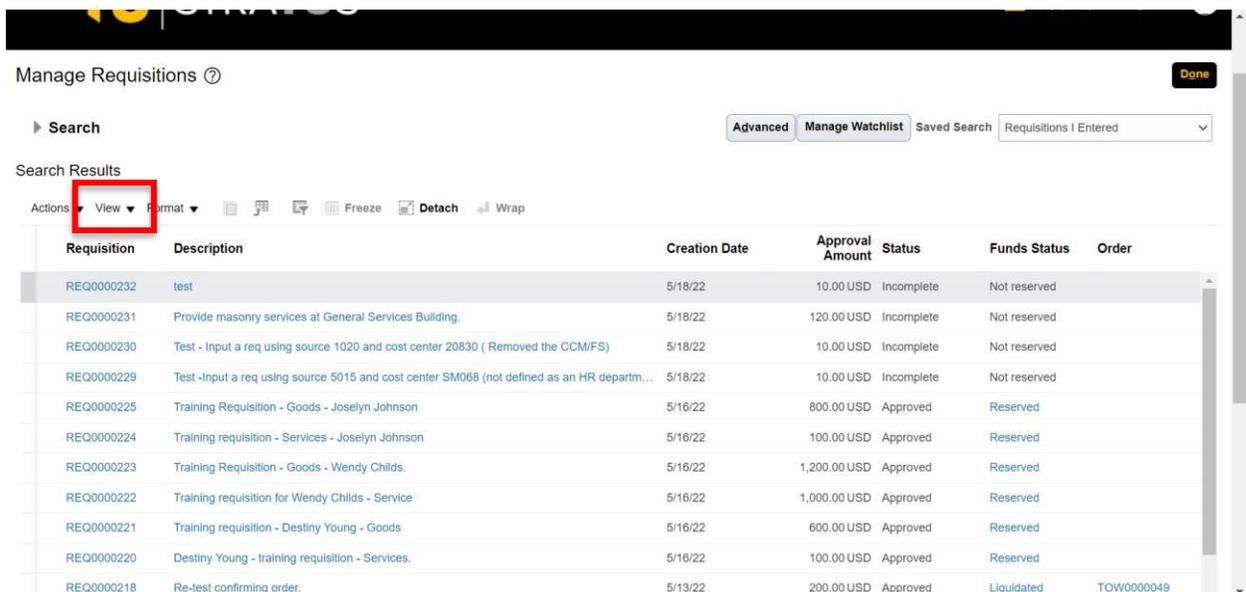
3. The system will display this drop down. We will then click on Columns to see what other information is available.

4. The system will now display all the information that is available with this view. A blue check indicates the column is being displayed. A gray box indicates the information is available but is not being displayed. For example, Order Status is currently not displayed. To view it, click the gray box to enter a check.

5. Order Status now has a blue check and is being displayed on the far right of the screen.

6. You also have the option to reorder columns. To do so, select View and on the drop-down menu, select Reorder Columns.

7. The system will return the Reorder Columns screen. Use the scroll bar to locate the columns you'd like to move. In this example, we will use Order Status.
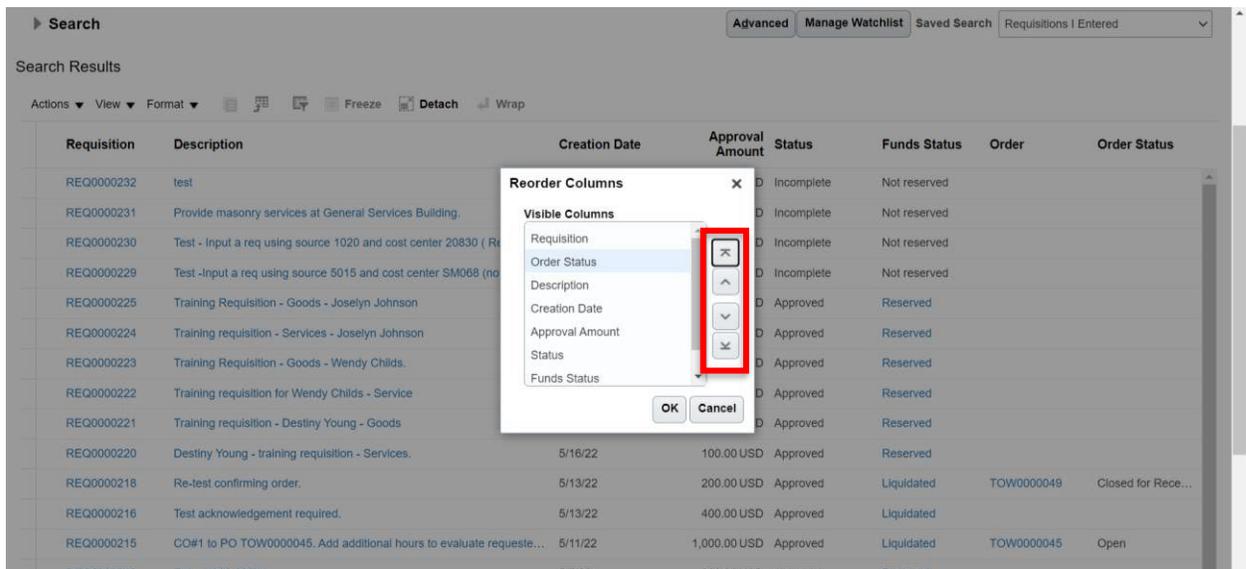
8. When you click on Order Status the system will display arrows that allow you to change its order on your display.

9. If you click the arrow with the line above it, the column will move to first on the display. We want the Order Status column to display second so we will use the plain arrow to move it to the left. Each click of the up arrow moves the column one space to the left (down arrow moves it to the right). Once the column is moved to the desired position, click OK.
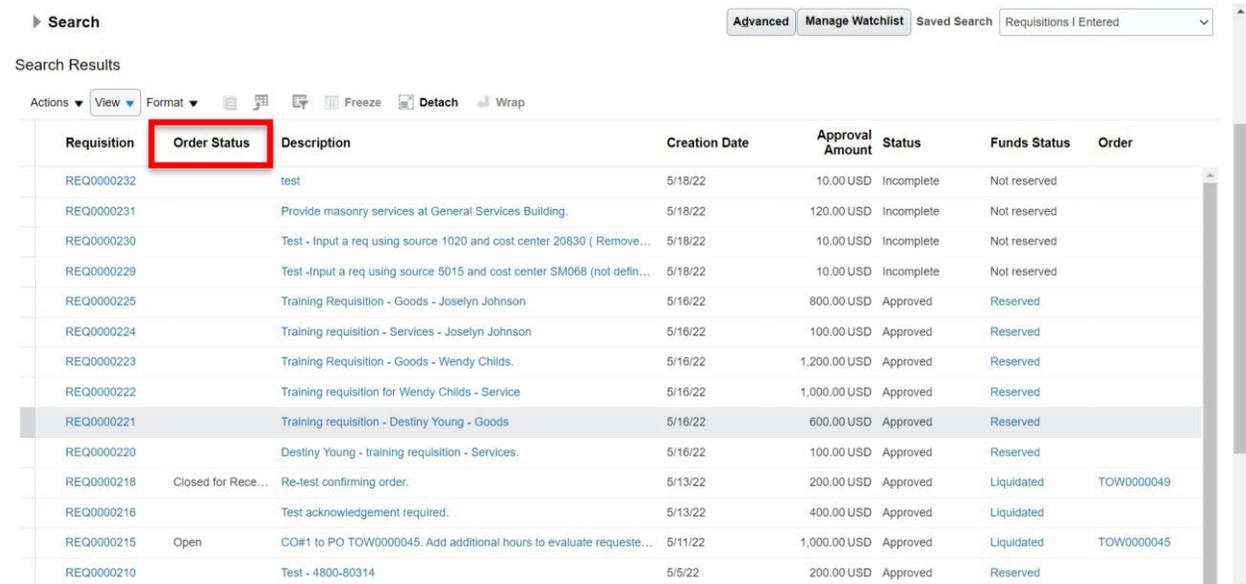
10. You can now see that Order Status is the second column displayed on the screen. The new order is automatically saved.

Appendix – Using Advanced Search to find a Category Name
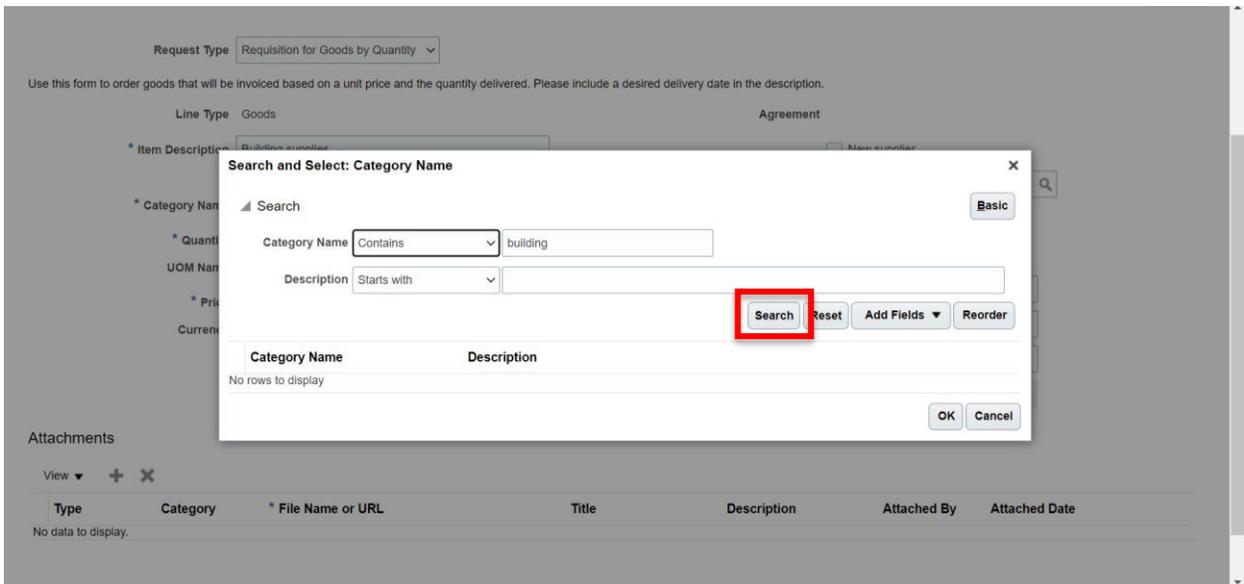
For employees creating a purchase requisition

1. On the Create Request page, when filling in the **Category Name** field, if a message returns "No results found", use the Advanced Search feature by clicking the **magnifying glass icon** next to the Category Name box.

2. This will bring up a "Search and Select" popup window. Click **Advanced** to bring up the Advanced Search screen.

3. Use the dropdown next to Category Name to select the type of search you want to conduct. In this example, we will use "Contains".
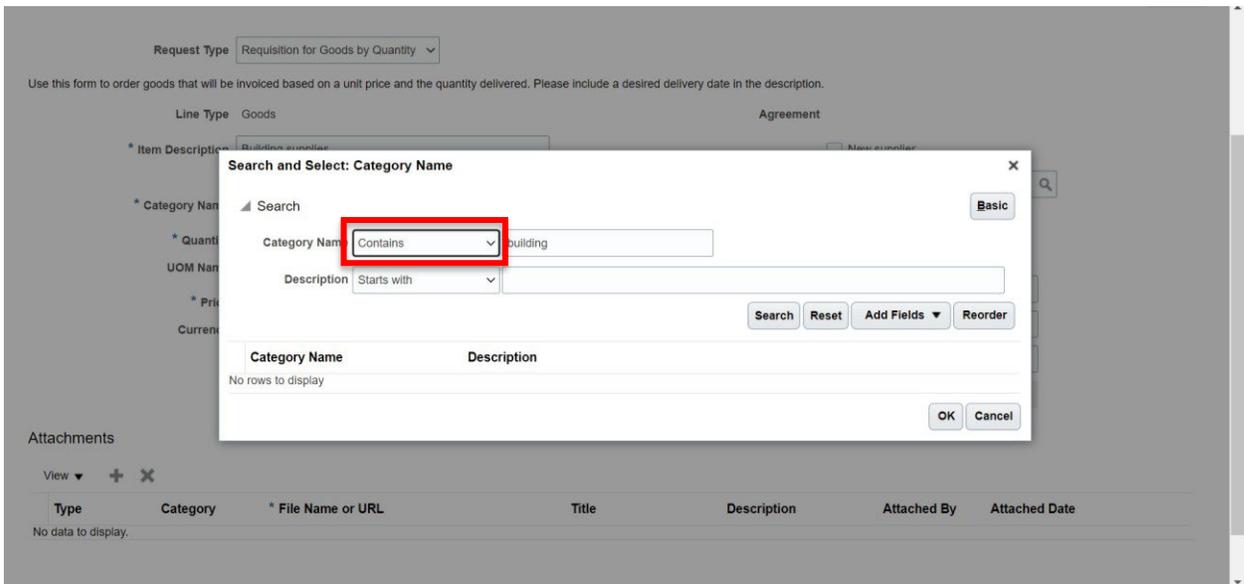
4. Type a portion of the category's description in the Category Name field. When you click search the system will return all Category Names that contain the information entered anywhere in the description (in this example, "building").

5. Highlight the line of the category you wish to select and click OK.

6. The system will return to the requisition page and automatically fill the Category Name field with your selection.