Morehead State University
Self-Service Procurement – Requisitions

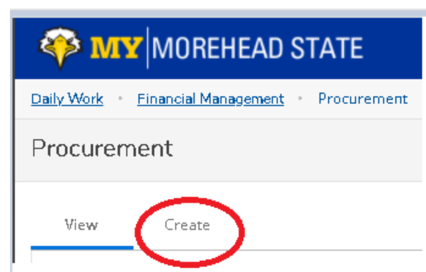
Step 1: Log into your My.MoreheadState.edu account and select the “Self-Service Link”

Step 2: Select the “Financial Management” tile

Step 3: Select the “Procurement” tile

Prevously created Requisitions, Purchase Orders and Payment Requests will be displayed (to modify existing documents – see step 8 below)

Step 4: Select “Create” for a new document



- **Document Type**: Requisition
- **Request Date**: will populate with current date
- **Initiator**: defaults to initiator of requisition
- **Confirmation email address**: will populate with initiator’s email, additional email addresses can be added for status notifications
- **Next Approver**: leave blank, the system will auto populate
- **Ship To**: select location for delivery of item from drop down menu
- **Printed Comments**: add delivery address if different than central receiving
- **Internal Comments**: add information for Procurement Services staff
- **Vendor ID**: enter the vendor’s name and select correct vendor information from search menu
- **Address**: will auto populate with default address. If the address associated with a vendor is not correct, add correct address into the Internal Comment section and the requisition will be manually updated.

- **AP Type**: VE – Vendor Employee Payable
  VP – Vendor Payables
- **Tax Code Fields 1,2 & 3**: leave blank
- Items: select "Add Item" 

  - **Description**: type description of item
  - **Quantity**: enter quantity of items to purchase
  - **Unit**: enter unit of issue from dropdown menu
  - **Price**: enter price per unit
  - **Extended price**: will auto calculate
  - **GL account**: begin entering account number and select correct GL from auto populated account numbers
  - **Amount**: enter amount to charge GL account (extended price can be submitted on multiple GL accounts)

To add Trade Discounts – these fields can be added when you modify an already existing requisition (see step 8) and are located on the "Additional Details" section of the requisition's line item.

- **Trade Discount Amount**: add dollar figure of discount
- **Trade Discount %**: add percentage discount

Step 5: Select: "Add item" 

to add additional line items OR

"Save" 

to submit document OR

"Save and Attach" 

to attach supporting attachments (quote/invoice, contracts etc.)

Step 6: To upload attachments:

Select “Choose File”

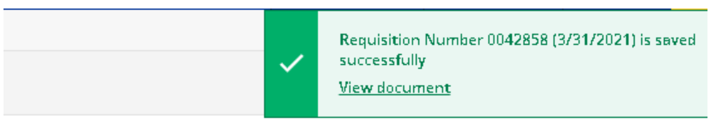
“Open” file from desktop

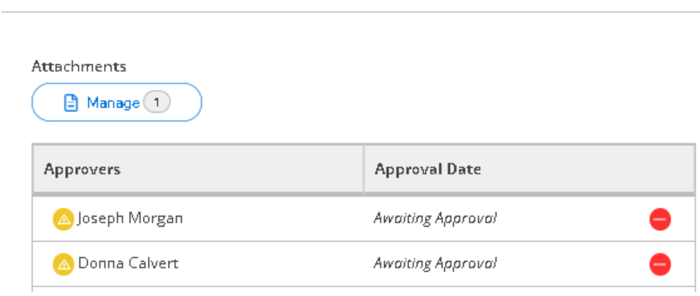
Select “Upload”

**Multiple documents may be attached

Step 7: Upon submittal of attachments:

- A requisition number is assigned
- The ability to manage attachments is available
- Email notifications generate to initiator and approvers

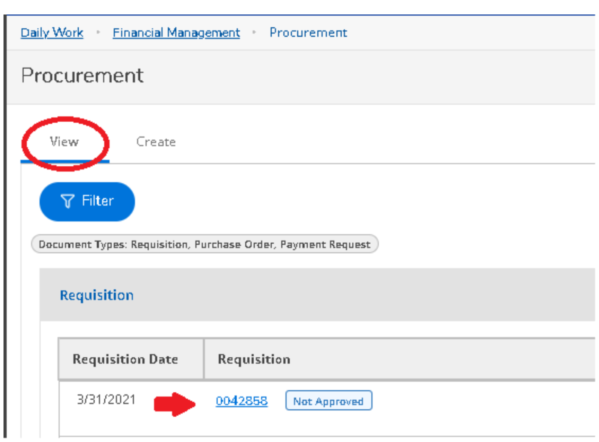




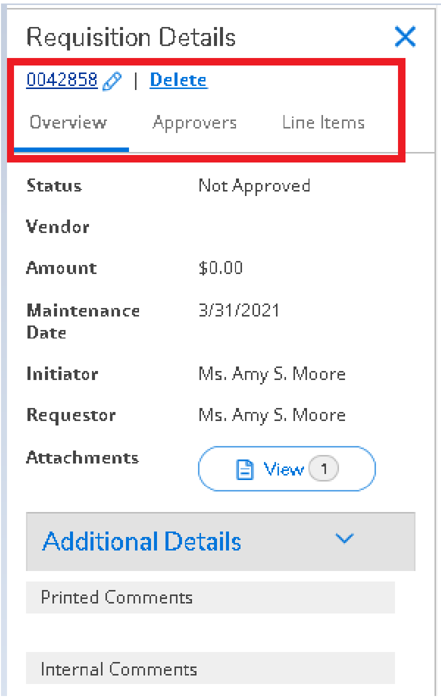
To modify requisition after submittal:

Step8: Select the “View” tab

Step 9: Select the appropriate requisition to modify



A Requisition Details screen appears offering edit, delete and tabs for overview of document information, approvers and line item review.



Selecting the pencil icon indicates editing ability

Step 10: Edit appropriate fields and select “Save”