BAIS [FN/BPS] JOB AID
Date Created: 5/19/2022
Date Modified:

9.2 REQUISITION PROCESS (BPS)

1. Log into Base Financials
   a. Click: *Main Menu*
   b. Click: *eProcurement*
   c. Select: *Requisition*
   d. Click on " Requisition Settings"
2. Fill in default information
   a. Name the Requisition
   b. Enter: ***Supplier (used to be "Vendor"), Category Code***, ***Unit of Measure***, ***Due Date***, the ***Attention information***
   c. Click: OK
      * Information from prior screen will default in*
3. Back on Landing Page - click on "Special Requests"
4. Enter: ***Item Description***, ***Price***, ***Quantity***
5. Click: *Add to Cart* (Bottom Left)
   a. Repeat until all you have added all desired purchases (Don't forget **SHIPPING COST**)
6. Click: "Checkout" to move to *Review & Submit* page
7. Click: "*Select All*" requisition lines
8. Click: "Mass Change" (Used to be Modify Line)"
   a. Click on "Load Values from Default"
   b. Update any Default values necessary
   c. Click: OK
   d. And click on "All Distribution Lines" to apply all changes"
9. Click: OK
10. Click: *Save & Submit*
    a. You will receive a Requisition #
    b. Click on "view printable version" to view the full Requisition on one page
    c. Close the PDF tab
11. Click: *Worklist* (Top right in Blue Bar)
12. Find your Requisition # and Click on it
13. Click: *Approved* (Bottom Left)
    a. To verify if the Requisition was valid/budget checked, please review the following day in Manage Requisitions.