REQUISITION SET UP

Reference the following tips and information to set up your requisitions.

ITEM TYPE
- **Quantity based** should only be used when you have exact quantities (ex: five (5) widgets @ $3.00/ea).
- **Amount based** should be used for services, including open service orders (ex: printer repairs not to exceed $500.00).

ITEM DESCRIPTION
Begin your line description by referencing the fiscal year your order is being funded (currently 14/15). List part/item number, full description of goods or services (ref. supplier quote/proposal) and include term of service (if applicable) at the end of the line (ex: 7/1/14 - 6/30/15).

Sample line for goods:
14/15 Item #43803850, Latex Gloves, Purple

Sample line for services:
14/15 Maintenance Agreement for Spectrometer #E734598, located in Admin 116, 24/7 coverage, includes parts and labor, Term: 7/1/14 - 6/30/15

Additional notes:
- The information in the item description is what is sent to the supplier.
- Do not include supplier name or internal information on line.
- Do not use acronyms and reference full names.

CATEGORY CODES / UNIT OF MEASURES
There are 100’s of category codes/units of measure. Use the most appropriate category code (do not always use miscellaneous). Select the unit of measure that corresponds with the item/service that you are requesting (reference supplier quotation or proposal). The most commonly used units of measure are “each” for quantity based and “dollar” for amount based.

SUPPLIER INFORMATION
Query/select the supplier name. If supplier is not found check the “new supplier” box and enter supplier name, address, contact, phone/fax, and email. Select the supplier site that is referenced on the quote/proposal.

Additional notes:
- Additional supplier information or updated supplier information may be entered in the “Note to Buyer” field.
- Do not use acronyms when searching for a supplier.

LINE TYPE
Select correct line type: Capital Asset, Construction Amount, Equipment, Goods Supplies, Goods Supplies Amount, IT Capital Asset, IT Equipment, IT Goods Supplies, IT Goods Supplies Amount, IT Services Amount, Services Amount, Services Quantity, Freight

ACCOUNT NUMBER
Use the appropriate natural account. Reference the “Frequently Used Natural Accounts” link on the C&PM website.

Additional Notes:
- Only one charge account can be used per requisition line.

GENERAL LEDGER (GL) DATE
The GL date defaults to the current fiscal year. If submitting a requisition for a future fiscal year, you need to change the GL date to July 1 of the future fiscal year.

REQUISITION ATTACHMENTS
Attach supporting documentation as pdf, word, excel documents, etc. Reference the Requisition Checklist.

ADDITIONAL INFORMATION

ELECTRONIC WASTE RECYCLING FEES (EWRF)
An EWRF fee is always needed when there is a monitor/display purchase. Create a requisition line for only the EWRF fees, see amounts below.

http://www.boe.ca.gov/sptaxprog/ewfaqs.htm

EWRF fees:
- Greater than 4 inches, less than 15 inches = $3.00
- Greater than or equal to 15 inches, less than 35 inches = $4.00
- Greater than or equal to 35 inches = $5.00

FREIGHT
Do not create a line for freight unless it exceeds $500.00.

RENEWALS
Reference “renewal” and indicate prior year PO number in the “Notes to Buyer” field.
REQUISITION CHECKLIST
Reference the following checklist for required requisition documentation.

**ALL REQUISITIONS FOR GOODS & SERVICES**
- Quote/proposal (provided by supplier)
- Any and all documentation obtained from supplier (terms & conditions, exhibits, etc.)
- Scope of work for services (if not defined on quote or proposal)

**ADVERTISING / JOB POSTING**
- Copy of advertisement or posting
- Reference VPAA #

**AFTER THE FACT**
- Justification (why department made purchase on behalf of the University)
- Invoice (if received)

**CATERING SERVICES** (Aztec Shops)
- Catering contract (unsigned)
- Hospitality justification form
- Event flyer, agenda and/or invitation

**CATERING SERVICES/FOOD** (Supplier other than Aztec Shops)
- Hospitality justification form
- Event flyer, agenda and/or invitation
- Catering waiver from Aztec Shops (if services are being provided on campus)

**ELECTRONIC AND INFORMATION TECHNOLOGY PURCHASES**
- View the Interim Policy for EIT Processing
  [http://access.sdsu.edu/procurement.htm](http://access.sdsu.edu/procurement.htm)
- Questions should be directed to the EIS Compliance Office, x44952 or rledgerwood@mail.sdsu.edu.

**EMPLOYEE REIMBURSEMENT**
- Original receipt(s) (mail/deliver to MC 1616 / AD 116)
- CC statement or bank statement
- Justification (why employee made purchase on behalf of the University w/personal funds)

**HOTEL**
- Contract / Agreement (unsigned)
- Hospitality justification form

**OFFICE WORK** (carpet, paint, blinds)
- Reference self-help work order # (if not going through Facilities Services department)

**PRINTED ITEMS SUCH AS LETTERHEAD OR ENVELOPES**
- SDSU Reprographics has first right of refusal. If you are not using SDSU Reprographics:
  - Quote or documentation (from Reprographics indicating that they are unable to perform the service).
- Artwork copy

**PROMOTIONAL ITEMS FOR GIVEAWAYS**
- Artwork copy (if items are being printed. Refer to “Printed Items using SDSU Logo or Name” below for more information.)
- Hospitality justification form

**PRINTED ITEMS USING SDSU LOGO OR NAME**
- If using:
  - Hepner Hall logo or University name, it is your department’s responsibility to make sure it meets University Guidelines
  - SD Arrow Athletics trademark, purchases should go through Aztec Shops

**ROOM RENTALS (@ SDSU)**
- Rental agreement (unsigned)

**SECURE DATA / CLOUD COMPUTING**
- Security Data Requirements Checklist
- Questions should be directed to the Information and Technology Security Office, x40142 or iso@sdsu.edu.

**SOLE SOURCE / SOLE BRAND**
- Sole Source / Sole Brand justification form