Creating a Requisition from a Blanket Purchase Agreement

This guide will cover:

- Utilizing a fully created Blanket Purchase Agreement set up in the Contracts module to enter requisitions using that contract.
- This requisition will be used to create a purchase order to make payments on a contract.

For details on creating a contract and Blanket Purchase Agreement (BPA), see the Create Services Contract Quick Reference Guide (link).

Step One

Navigate to the Procurement Shop page.

- Upon signing in, this home page will display. Click on the Navigator button (the three horizontal lines) in the top left corner:

The Navigator bar is where you can find links directing you to all of the modules and pages that you have security access for. For this particular process, go to Navigator > Procurement > Purchase Requisitions.
- The **Procument Shop** page will display.

![Procument Shop Image](image1)

**Step Two**

**Note:** Prior to completing a requisition be sure you have updated your Requisition Preferences. WyoCloud defaults the **Deliver-to Location** to the building you work in, you will need to change this to your **department name**. This one time change is important to be sure your items are delivered properly.

- From the **Procurement Shop** page, select **Edit** under **Requisition Preferences**.

![Procurement Shop Image](image2)
- Select the **magnifying glass** next to *Deliver-to Location*.

![Edit Requisition Preferences](image)

- Enter your department name in the **Name** field then click **Search**.
  - Highlight the correct result, then click **OK**.

![Search and Select: Deliver-to Location](image)
- Click **Save and Close**.

- Your Deliver-to Location is updated in the **Procurement Shop**.
**Step Three**

Locate your Blanket Purchase Agreement (BPA) and add it to a requisition.

- Search for your BPA using the **Search Catalog** field at the top of the Procurement Shop page. This can be done by entering the BPA number, supplier name or putting B% (all BPAs will be listed). If multiple BPAs are listed choose the correct BPA by highlighting the line.

- If you would like to pay the BPA in full, keep the Quantity at 1 and click **Add to Requisition**. If you would only like to pay a portion of the BPA use a decimal number in the quantity box to represent the percent of the BPA you’d like to pay (e.g., 0.5 for 50% or 0.25 for 25%). Then click Add to Requisition.
You will now see the item has created a new requisition in the upper right corner of the screen.

![Requisition: R105141](image)

**Step Four**

- Edit the Requisition and attach any documents to send to the supplier.

Note that much of the details such as the Billing information, description and amount have come over from the contract and BPA.

- Click **Edit and Submit** for the requisition.

![Requisition: R105141](image)
- No additional attachments for Procurement Services are required (ex. Agreement for Services, Contract or Employee vs Independent Contractor Worksheet), as the contract process serves this purpose. However, attachments which must be sent to the supplier can be attached in the **Notes and Attachments** section below Billing.

- To attach a document in either attachment section, click the **plus sign**. Then select **Choose File** to browse for the correct attachment. Once located, click **OK**. **When adding an attachment to be sent to the supplier, make sure you select "To Supplier" from the drop down menu.**
**Step Five**

Check for funds and submit the Requisition.

- Click **Check Funds** at the top of the page to verify funding availability for the Requisition.  
  *Note: This only verifies funds are available in that given moment.*

- A confirmation pop up will appear. Click OK:

  ![Confirmation pop up](image)

  **Note:** If total requisition amount is less than or equal to available funds for the Charge Account used, you will get a Confirmation Message ‘The transaction passed the funds check process.’

  However, if total requisition amount is more than the available funds, you will get an Error Message ‘The transaction failed the funds check process.’

- Once the funds check passes, click on the **Submit** button:
A confirmation pop up will appear. Take note of the Requisition number displayed in the pop up window. Then, click OK:

After clicking OK, you will return to the Purchase Requisitions Shop Page, where you will see all of your requisitions.

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Description</th>
<th>Creation Date</th>
<th>Approval Amount</th>
<th>Status</th>
<th>Funds Status</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>R10227</td>
<td>items testing</td>
<td>4/15/2017</td>
<td>$15.00 USD</td>
<td>Pending approval</td>
<td>Not reserved</td>
<td></td>
</tr>
<tr>
<td>R103124</td>
<td>gel - laptop3</td>
<td>4/12/2017</td>
<td>$99.70 USD</td>
<td>Approved</td>
<td>Reserved</td>
<td></td>
</tr>
<tr>
<td>R103122</td>
<td>gel - laptop2</td>
<td>4/12/2017</td>
<td>$29.90 USD</td>
<td>Approved</td>
<td>Reserved</td>
<td></td>
</tr>
</tbody>
</table>

You have now completed the steps for Create Requisition from a Blanket Purchase Agreement.