**High Value/Blanket/Departmental Requisitions**

**Summary:** The Purchase Requisition is used to order equipment, supplies or services through the UCI Purchasing Department. It is an authorization to commit departmental funds. A Purchase Requisition is **not** a Purchase Order: do not give the number to a Vendor. All Blanket Purchase Orders are done on High Value Requisitions.

High Value Requisitions are used:
- For orders of $2,500 or more, per vendor, per day, including tax and shipping
- For orders less than $2,500 and the "Commodities Not Permitted" list specifies the "Purchasing Dept."
- Any dollar amount and no available staff with purchasing delegation
- As a Blanket Order for repetitive purchases of supplies/services from one vendor when PALCard is not accepted or appropriate

**PAL Action Codes**

A - Add  
L - List  
C - Change  
D - Delete

**High Value Transaction Codes**

P31 - Vendor Selection (Not Required)  
- Is used to search for and select a vendor: it displays multiple vendors alphabetically by “Vendor Name” and allows you to select the desired record

D10 - High Value Header  
- Allows authorized users to add and edit requisition information to create an on-line requisition: it must precede entry of any requisition line items.

D11 - High Value Line Items  
- Allows authorized users to add to and edit specific line items in an established requisition

P19 - Purchase Order Inquiry  
- Provides complete information about a purchase order

D13 - High Value Authorization
• Allows authorized users to authorize a requisition to be processed by Purchasing: all prior approvals must be obtained before completing this screen

How to select a vendor

The Vendor Selection transaction (P31) is used to search for and select a vendor. This transaction displays multiple vendors alphabetically by "Vendor Name" and allows selection of the desired record.

To Display Vendor Records:
• Go to the Vendor Selection transaction (P31)
• Enter the vendor name in the Vendor Name field
• Press <Enter> to see the data: the system displays vendors by name, number and address beginning with the vendor closest to the name entered
• Scroll backward and forward by using the <F7> and <F8> keys
Select and Move a Vendor Number and Name into the Next Transaction:

- Enter the transaction code for the appropriate transaction screen in the Next txn field adjoining the selected vendor
- Press <Enter> to pull the selected vendor into the next transaction

High Value Header (D10)
Fill in Header screen

- Use appropriate Action Code
- Use <F1> key on first space of each field for a description/definition
- To create a Blanket PO, include an Exp. Date, usually the last day of the current fiscal year
- Ensure your Delivery Location is correct. Use the F4 Value Prompt to check additional detail or the DLN, Delivery Location Inquiry, transaction to see full detail. To make changes to a Delivery Location address, contact Purchasing, (949) 824-6516.
- Press <enter> to update and save
- Write down the assigned requisition number

_0302   _D_ 00 ___005896__  _  ___

4 digit Dept Code
Class Code
6 digit Requisition #
If HV or LV, POC field
Navigate to the Line Item screen
- <F9> to move cursor to Next transaction field
- Type the High Value Line Item transaction code (D11)
- Press <F2> to pull it in

High Value Line Item (D11)

Fill in Line Item screen
- Line Item Code field:
MAT - Taxable Line Item
MAS - Taxable and Non-Taxable Line Item
SVC - Service (non-taxable)
• If creating a Blanket PO, leave the Quantity, Unit of measure and Unit price fields blank
  • Complete the Extended line price field
• Press <Enter> to update and save

For additional lines:
• Press <F2> to clear screen
• Press <Enter> after each line screen is complete to save data

For additional comment lines:
• Note the Seq: numbers to the right of each comment line
• <F9> to go to Next transaction field
• Type Extra Comments transaction code (U08)
• Press <F2> to pull it in: view other transaction codes for U08 directions

For Equipment Management threshold information:
• http://snap.uci.edu/viewXmlFile.jsp?resourceID=1100

Navigate to the P.O. Inquiry screen
• <F9> to move cursor to next transaction field
• Type P.O. Inquiry transaction code (P19)
• Press <F2> to pull it in
Scroll through P.O. Inquiry using the <F8> key to verify accuracy.

Return to appropriate screen to make any changes:
- <F9> to next transaction field
- Type the desired transaction code
- Press <F2> to pull it in
- Enter <L> in the action code to list the information
  - Enter the Line Item number, if pertinent
- Press <Enter> to populate the screen
- Enter <C> in the action code, make any necessary changes
- Press <Enter> to update
Navigate to High Value Authorization
  • `<F9>` to move cursor to next transaction field
  • Type High Value Authorization transaction code (D13)
  • Press `<F2>` to pull it in

High Value Authorization (D13)

To authorize:
  • Ensure that all approvals have been obtained and documented
  • Type authorization code `<Y>`
  • Press `<Enter>` to authorize and send to Purchasing for processing