

3.2 Purchasing Department – College Requisition Form Instructions

The college requisition form is completed to initiate the purchase of goods or services from Vendors (external and internal). A requisition form (Excel format) is available on the Purchasing Department website at www.uri.edu/purchasing under Forms.

The college requisition uses macros to provide an auto-numbering feature to create a random requisition number. To enable macros in Excel (versions 97- 2003) the security level will need to be changed to “Medium”. To change the security setting in Excel for PC users follow the instructions below:

1. On the Tools menu, click Macro.
2. Click the Security tab.
3. Under Macro Security, click Macro Security.
4. Click the Security Level tab, set to Medium.
5. Exit Excel completely before this change will take effect.

The security setting for Mac users should default to the required setting.

The security level setting needs to be changed only once but **you will need to “enable” macros each time you open the document for the auto-numbering macro to run.** If you have trouble with your macros please contact the ITS Help Desk at 874-HELP, option 1.

Procedures for Completing the Requisition Form

The following list details the different fields on the requisition form. The Purchasing Department and Grant & Contract Accounting, when appropriate, will complete shaded fields on the requisition form. ***Fields marked with an (*) asterisk below are required. Failure to complete these fields may result in your order being delayed.***

Field:		Requirements:
*	URI College Requisition Number	The requisition number will automatically be generated when You click on: To generate a COLLEGE REQ NUMBER, please CLICK here
	Date	The date will automatically populate with the current date.
	Suggested Vendor	Vendor name, complete mailing address including postal code / zip code.
	Vendor PS Number	Please include the Vendor PS Number, if available.
	Vendor Phone Number	Please include the phone number of the vendor if it is known.
	Vendor Fax Number	Please include the fax number of the vendor if it is known.
*	Requisitioning Department	Enter the Department Name.
*	Deliver To: (include room #)	Complete shipping address including room #.
*	Date Required	Indicate date materials or services are required.
*	E-mail address for Receiving Report	Indicate the e-mail address where receiving report should be sent.

*	Quantity	Provide the order quantity required. If you are ordering material, please ensure that it corresponds with the package sizes.
*	Unit of Measure	Examples: package, each, box, grams, litre, pint, gross.
*	Catalog Number/Description	Give complete catalog descriptions and /or Vendors catalog numbers to fully identify your requirements. Attach any additional information required to the requisition form. Please ensure that the attachments reference the requisition number. In instances where specifications are lengthy and/or when ordering 10 or more items, a bid sheet must be prepared and attached to the requisition.
*	Unit Price/ Extended Price	Enter the unit price. The extended price should calculate automatically based on the quantity entered. Include the estimated price per unit if the actual price is not known.
*	Requisitioner Name	Department Contact Person
*	Telephone	Department Contact Person Telephone Number
*	Acct/Fund/Dept/Program	Enter the account/fund/department/program, i.e.: 523210020200000.
*	Project	Enter the project, when appropriate.
*	Amount	When using more than one chartfield string, indicate the amount to be charged to each chartfield.
*	Approved By	Signature(s) of the authorized agent(s) responsible for the chartfield(s)

After the college requisition number has been generated and all applicable fields on the form have been completed, please **print the form**. The Department Authorizing Signature(s) must be applied to the printed copy of the requisition form. In addition, the following approvals may be required:

- Grant & Contract Accounting when using Research Funds (Fund 500)
- URI Foundation Office when using Foundation Funds (Fund 401)
- Business Services when using Bond Funds

Upon obtaining the necessary approvals, the requisitioning department ***retains a copy***. The requisition is now ready for distribution.

Distribution:

Forward a signed copy of the requisition form to the URI Purchasing Department, 581 Plains Rd. or via fax to 874-2306. If you are faxing your requisition, **DO NOT** send the original in the mail.

See [Section 2.12](#) for routing of a college requisition to an internal vendor.

Note: Where additional instructions and/or special circumstances are necessary for a specific purchase, please attach a memo of explanation. Refer to [Section 2.1](#) of the Purchasing Manual for further details on the University of RI Requisition (College Requisition).