



Activity: Requisition Entry (Warehouse Pick Ticket)
Departmental Functions > Requisition Entry

Generate a requisition to the warehouse (pick ticket)

1. Navigate to **Requisition Entry**
2. Select the Warehouse requisition form
 - a. Click **Switch Form**
 - b. Select **B – WHSE**
 - c. Click **OK**
3. Click **Add**
4. Skip the main section of the header and proceed directly to the **Shipping and Billing** section
 - a. Input identifying information in **Reference** (e.g. recipient's name and room number)
 - b. Click **Accept**
5. Add line items
 - a. Input the **Quantity**
 - b. Tab to **Inventory Item** and input the item number (or select it from the ellipsis)
 - c. Tab to **Description**
 - d. Tab to **Account**
 - i. The object segment will default in based on the item selected – do not change this segment unless the item will be coded to **Due from Internal Accounts**
 - ii. Input the remaining segments or use the ellipsis to select the appropriate account
 1. To select from available accounts rather than manually inputting them, click the ellipsis
 2. Only available accounts will populate – select the one that the line will be charged to
 3. Click **Accept**
 - iii. Click **Accept** to finalize line
 - e. To generate additional lines, click **Add** and repeat steps **a** through **d**
 - f. Click **Return** once all lines have been created *and* coded
6. Verify **Status** of **4 – Allocated** then click **Release** to release the requisition into workflow for approval



If there is an insufficient amount of items to cover the quantity requested, the message 'Warning: This inventory item is over committed' will appear after clicking **Accept** on a line item. Placing the order as-is will result in the overcommitted quantity becoming back-ordered. Use the process detailed in **View specific warehouse items or groups of warehouse items** on the **Warehouse Inquiry** QSG to research quantity-on-hand and determine how many items will be back-ordered and how many will be shipped. Once a requisition is approved, back-orders can be canceled by contacting the warehouse.



Warehouse orders can be coded to come from internal funds. Use the coding strip 1100.COST.LV.01000.114200.0000.0000 (replace COST with the cost center number and LV with the level). This will add the line's expenditure to **Due from Internal Accounts** and will be added to the 'due to district' invoice.



Duplicating a requisition will only copy the line detail if the budget is available with the original funding strip. If over budget the line detail will not duplicate.



The system will not allow orders over budget. Use **Account Inquiry** and **Year-to-Date Budget Reports** to ensure adequate funding is available, and process any necessary budget amendments to move funds into the correct segments.



Requisitions can *only* be updated while in status **2 – Created** or **4 – Allocated**

Update or change line items on a warehouse pick ticket

1. Navigate to **Requisition Entry**
2. Click **Search** and input search criteria (such as location and requisition number) to narrow down search results
3. Select the pick ticket to be updated
4. Click **Line Items**
 - a. To update a line, select the line that will be updated
 - i. Click **Update**
 - ii. Make any necessary changes
 - iii. Click **Accept**
 - iv. Repeat steps **i** through **iii** for each line that is to be updated
 - b. Click **Add** to add a new line
 - i. Input the **Quantity**
 - ii. Tab through **Inventory Item** and input the item number (or select it from the ellipsis)
 - iii. Tab to **Description**
 - iv. Tab to **Account**
 1. The object segment will default in based on the item selected – do not change this segment unless the item will be coded to **Due from Internal Accounts**
 2. Input the remaining segments or use the ellipsis to select the appropriate account
 - a. To select from available accounts rather than manually inputting them, click the ellipsis
 - b. Only available accounts will populate – select the one that the line will be charged to
 - c. Click **Accept**
 3. Click **Accept** to finalize line
 - v. To generate additional lines, click **Add** and repeat steps **i** through **iv**
 - c. Click **Return** once all lines have been updated/created *and* coded
5. Verify **Status** of **4 – Allocated** then click **Release** to release the requisition into workflow for approval



In the event an item is backordered (over committed) but a backorder is not desired, contact the warehouse via email to request that the backordered quantity is removed from the pick ticket.