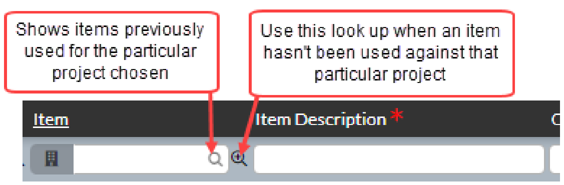
SUBMITTING REQUISITIONS CHEAT SHEET

Visit the IT Training Library, or the links on WorkPlace Homepage for more detailed instructions

INVENTORY and NON- INVENTORY

REMEMBER: **DO NOT combine Inventory and non-inventory items on the same requsition. Use separate requsitions!**

1. Log into WorkPlace (https://purchase.ntpc.com)
2. Click **Requisitions** → **Transactions** → **Requisitions Entry**
3. Enter a descriptive **Requisitions Name**, **Work Order #** and **Required Date**. (Optional: Internal Comment)
4. Select a **Project Number** and **Cost Category**
   Replenishing inventory → Project number **350813500001000**
   Cost Category **5301.0007**
   - ✓ **Inventory – Cost Category will always end in 7**
   - ✓ **Non-Inventory – Cost Category will always end in 0**
5. Enter Item information:
   - ✓ **Inventory** – Enter the item number. Use the manifying glass icon to help your search for inventory items
   - ✓ **Non-Inventory** – Enter an item detail in the Item Description field. If you have a part number, enter it in the Item box.



6. Enter a **Quantity**
7. Validate or Enter **Unit of Measure (U/M)** and **Price**
   - ✓ **Invetory –** these fields will autopopulate
   - ✓ **Non-Inventory** – If you have a quote, enter that price. If you do not have a quote, enter $1 in price.
     Requsitions will NOT route for approval if you do not enter a price
8. Enter any documentation as attachments using the paperclip icon.
9. In the general section at the bottom, select a **Final Destination Site ID, Prioirty** and **Ship To**. Repeat for all Item lines.
10. Click Save at the top of the screen
11. Click Submit when you've completed your requisition.

Based on the requsition amount, department and NTPC Purchasing Policy, the Requisition is routed for approval.

Last Updated: September 2022

RULES TO REMEMBER

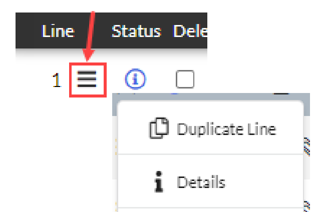
Not following these rules may result in requisitions being disapproved or canceled which may result in delays if items being issued.

- **Take time to search the inventory list before submitting a non-inventory requisition.** Search for inventory Items using **Inventory Item Qty on Hand per Location** at the top of the screen or the Inventoy Info button next to the item field.
- **DO NOT combine Inventory and Non-Inventory Items in the same requisition!**
- Remember:
  - ✓ Cost Category Inventory Items end in 7
  - ✓ Cost Category Non-Inventory Items end in 0
- **Priority**, in the general section at the bottom, is required for each item line on the requisition

TIPS FOR QUICK AND EASY REQUISITION ENTRY

Follow these tips for quick and easy requisition entries:

- **Duplicate** your item line to speed up entering the similar information.



- Use the **Details** to track your submitted requisition: where it is in the approval routing and view the information created on the PO.
- **Mass Line Change** can be used when modifying information (i.e. Priority, Project, and Cost Category) on a large requisition.
- Clean out your outstanding requisitions by modifying to cancel or resubmit.
- Use the **internal comments** fields to provide information to the buyer.

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