Ball State University
Purchasing Department
Policy: Requisition

General
The purchase request process is a procedural method by which departments may request the purchase of goods and/or services which require processing by the Purchasing Office, usually because of the dollar value, the nature of the purchase, or the type of goods and services. The purpose of the Requisition form is to purchase:

- Goods or services which are restricted from purchase on procurement cards
- Purchases which require the execution of a contract.

Requisitions are created electronically in JAGGAER by designated departmental staff. Requisitions must have the budget available and must go through the appropriate approval process, as designated in JAGGAER.

User security is established in the Controller's Office and the scope of the user's access is defined by department accounts and hierarchy within the University.

Procedure
1. Departments will determine their needs and then create a Requisition as follows. The person with the appropriate security will enter an online request into JAGGAER. The Requisition creation process requires the generation of a document number and the assignment of a vendor name.
2. The vendor name may be selected from a database and is maintained by the Purchasing staff during the creation of the requisition. If the vendor is not listed, the user should first submit a New Supplier Request, utilizing the appropriate form in JAGGAER. This form is routed to Purchasing Services. The supplier will be required to provide a current copy of the company's W9. Once the supplier has been entered into the system, the user will receive email confirmation that the supplier is active and is now able to be used.
3. The individual (user) entering the request will be required to select a commodity code for each line item. This commodity code routes all orders over $4,000 to the appropriate Purchasing Agent to approve and/or provide additional assistance with the Requisition. It is possible for Requisitions to require supporting documentation to be attached. Additional documentation requests will be noted in the "notes" section of the document.
4. If the Requisition has been routed to a Purchasing Agent, the agent will process the request based upon one of the following methods:
   - Approve the Requisition if proper conditions are met
   - Update and make changes as needed to price, supplier, etc.
5. If necessary, the Purchasing Agent will send the Requisition out for bid via the Sourcing module within JAGGAER. Bids submitted in the Sourcing module will be monitored and evaluated by the Purchasing Agent. Selection of a vendor for award will be determined by the Purchasing Agent based on established criteria of lowest cost and best value to the University.
6. After all approvals have been met, JAGGAER will assign a Purchase Order number to the Requisition and send the document to the vendor.

Responsibility:
Departments on BSU campus
Purchasing
Finance

Other Departments Affected:
All departments on BSU campus

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