

Introduction

Requisitions are the first stage in the Procurement Lifecycle and are typically created by agency end users. The Universal Requestor Catalog Search inquiry (URCATS) is the starting point for Procurement activity. Users search the State of Maine's database of Catalog Items and Master Agreements to locate desired items.

Creating an RQS Document

1. Log into AdvantageME.
2. Select the Procurement workspace from the Primary Navigation panel.
3. Select Creating Requisitions from the Secondary Navigation panel.
4. Click Pre-Encumbering Requisition Search to open the Universal Requestor Catalog Search page.

Universal Requestor Catalog Page

5. In the **Search For** field, enter search terms for the desired commodity and then click Browse.
NOTE: The percent character “%” is used as a “wild card” rather than the more typical asterisk (*).

6. After the search results are displayed, select the checkbox next to the desired commodity.
7. Expand the **Create Request** section and then enter **Department** and **Unit** fields.
8. Click Start New Request. The **Catalog Comparison Sheet** page opens.

Catalog Comparison Sheet Page

9. Enter the following information, as appropriate:
 - **Request** (checkbox)
 - **Quantity**
10. Click Create Request. The UR document page opens to the Header section.
11. In the **General Information** area, enter the following information, as appropriate:
 - **Document Description**
 - **Requestor ID**
 - **Issuer ID** (infers)
 - **Shipping Location**
 - **Billing Location**
 - **Delivery Date**

NOTE: **Contact** information is inferred by the system when document is validated or saved. **Extended Description** area is optional.

12. Click **Save**.
13. Click Ship/Bill to Lines.
14. Select Step 4: Commodity from the Secondary Navigation panel. The page opens to **General Information** area.

Commodity Page

15. All **Shipping/Billing** information is inferred from the Header.
16. Select Step 5: Accounting from the Secondary Navigation panel.

Accounting Page

17. Click Insert New Line.
18. Open the **Fund Accounting** area and enter the following information:
 - **Fund**
 - **Department**
 - **Unit**
 - **Sub Unit**
 - **Object**
19. Select **Save**.
20. Select **Validate**. If the system returns error messages, make the appropriate corrections and **Validate** again.
21. Select **Submit**. A message is returned, *Document submitted successfully*.

NOTE: UR documents do not enter workflow for approval. Once submitted, they go to Final status.
22. Click Step 7: Created Documents from the Secondary Navigation Panel.

Note: A RQS document will only appear if the dollar amount on the UR is greater than \$2500.

Created Documents Page

23. Click the RQS document link under the **Document ID** column.

Header Page

24. The RQS document page opens to the **Header** section. Notice the document is now a New Draft document.
25. The **Document Description** field is inferred from the UR document. If necessary, edit the field to customize the description for this document.
26. View all completed fields of the document to verify that the information is correct.
- Note:** The Vendor line may be blank. It is optional on RQS documents, as items may be put out to bid.
27. Click **Validate**. Correct any errors and click **Validate** again.
28. Click **Submit** after all the errors have been corrected. A message is returned *Document submitted* successfully. The document is now a New Final document in the Document Catalog.
29. Click **Close** to exit the document.

State of Maine Policies

The Requisition (RQS) document is used to describe requested goods and/or services, obtain departmental approval, and route to Division of Purchases (DOP) for purchases greater than \$2500 and for commercial printing orders of any dollar amount.

There are two scenarios that create the RQS document:

- 1) The source on URCATS is a loose commodity
- 2) The source on URCATS is a PO AND the amount on the UR is greater than \$2500

State of Maine Resources

Visit the AdvantageME Training Web Site (address below) for:

- Training Materials
- Video Demonstrations
- Help Desk Form
- AdvantageME Newsletter

For immediate assistance, contact the Help Desk at (207) 624-7700.

AdvantageME Financial Management System



Creating Standard Requisition (RQS) Documents

Quick Reference Card