

BYU

Dining Services

Standard Operating Procedures

BP0021: Requisitions

<p>Business Process ID: BP0021 SOP Collection: Eatec SOPs Last Updated: URL: /policy/eatec/requisitions</p>	<p>SOP Owner: Douglas Walker Accountable Group: Dining Accounting Collaborative Business Process</p>
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Purpose

A requisition is a request for Items or Finished Goods from one area to another. This SOP covers the creation and processing of a requisition in Eatec. Requisitions are the precursor to transfers in Eatec meaning a transfer will fulfill the request for inventory (requisition) and will facilitate the movement of inventory in Eatec.

Responsibilities

Area Responsibilities	Centralized Responsibilities
<p>Requesting Location:</p> <ul style="list-style-type: none"> Create requisitions following the process outlined in this SOP. <p>Processing Location:</p> <ul style="list-style-type: none"> Process requisitions following the process outlined in this SOP. 	<p><u>Dining Accounting</u> Doug Walker (Dining Systems Coordinator):</p> <ul style="list-style-type: none"> Monitor for transfers that may have caused imbalances in the weighted average cost or misallocation of funds. Train employees and answer questions regarding this SOP.

SOP User Guide

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Definitions

Requisition: A request from one area to another for Inventory Items and/or finished goods

Transfer: The final step in the requisition process. Once the area receiving the requisition receives the appropriate paperwork, the requisition is then processed, and inventory items or finished goods are transferred.

Requesting Location: The location requesting the Inventory Item or finished good.

Supply Location: The location supplying the item or finished good that will be transferred. Also responsible for processing the requisition once the transferred items have been completed and appropriate paperwork has been received.

Processing a Requisition: completing the requisition process by loading the requisition and transferring the items on the requisition from one area to another. Requisitions are processed by the supply location in the requisition process

Creating a Requisition

1. Access Inventory Management

- Click on the “Inventory Management” tab located on the left side of the screen under the Eatec dashboard

2. Select “Requisitions”:

- From the dropdown list that appears, choose “Requisitions.”

3. Create a New Requisition:

- Click the blue “New Requisition” tab in the top right corner of the screen.

4. Provide Details:

- Under the “Details” section, click the dropdown arrow in the “Request Location” field and select the area requesting the inventory item or finished good.
- Click the dropdown arrow in the “Supply Location” field and select the area where the inventory item or finished good is to be supplied.
- Add any special circumstances for delivery or production in the “Remarks” field.
- All other fields can be ignored as BYU currently is not using departments, override account numbers, priorities, project expensed, or references in requisitions.

5. Select Items:

- Click the blue “Item List” carrot under the “Print and Request” tab in the upper right side of the screen.
- Two search fields will appear:
 - In the search field next to “Inventory - Items,” search for items or finished goods.
 - You can also load items via packages, classes, or types using the dropdown selection in the “Inventory Items” field.
- Once you’ve selected the desired items, click the blue “Select” button at the bottom right of the item search list.


6. Review and Add Items:


- If the items are finished goods, a new box will appear with the added items and finished goods.


- Confirm that the list of requested items looks satisfactory.
 - Select the blue “Add” button on the bottom right of the screen.
- 7. Specify Quantities:**
- On the screen with the list of requested items and finished goods, fill in the desired quantity under the “QTY” column.
 - Double-check that the units match the desired units for transfer.
- 8. Verify Pricing:**
- Review the “Est. Total” section to ensure pricing seems accurate.
- 9. Submit the Requisition:**
- Click the blue “Print and Request” button at the top of the page to generate a paper or PDF copy of your order.
 - Alternatively, you can click the blue “Request” button to create the requisition without paperwork or copies.

Processing a Requisition

- 1. Access Inventory Management:**
- From the Eatec home screen, click on the “Inventory Management” tab under the Dashboard section on the left side.
 - Select “Transfers” from the dropdown menu.
- 2. Open Requisition:**
- In the top left corner of the Transfers screen, locate the blue “Open Requisition” field with a dropdown arrow.
 - Choose “Open Requisition” from the available options.
 - All open requisitions will appear.
- 3. Search or Sort:**
- To find a specific requisition, use the “Search by Requisition #” field on the left side of the screen.
 - Alternatively, sort requisitions by criteria such as Requisition #, Request Location, or Supply Location.
- 4. Select Requisition:**
- Identify the appropriate requisition and double-click on it.
 - You’ll be taken to the “New Transfer” screen.
- 5. Review Details:**
- Confirm that quantities, pricing, items, and locations are correct.
- 6. Choose Action:**
- Click the blue “Print and Transfer” button at the top right of the screen for proof of paperwork.
 - Alternatively, click the blue “Transfer” button to transfer the inventory item or finished good directly.
- 7. Print Transfer (Optional):**
- If you selected “Print and Transfer,” a “Transfer Print” box will appear. Choose your desired format for printing.

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