

Introduction

This Quick Reference Card provides step-by-step procedures for creating and submitting General Requisitions. Use the General requisition type to order the following items:

- **RoundTrip**, also referred to as “punch-out” is used to browse for and order items directly from a participating supplier's Web-based catalog.

Adding RoundTrip Items to a General Requisition

Use the RoundTrip tab to add RoundTrip items to a General Requisition. RoundTrip, also referred to as “punch-out”, allows you to browse and order items directly from a participating supplier's Web-based catalog.

1. From the Home page, select the appropriate **Organization**.
2. Click the **New General Requisition** link under the **Purchasing** heading in the **Create** area.
3. Click the **RoundTrip** tab. (To add RoundTrip items to a requisition in progress, simply click this tab.)
4. Select the vendor from the **Supplier Name** list by clicking on the link.
5. The system “punches out” to the supplier's catalog.
6. Follow the supplier's online purchasing steps through to the final step.
7. You will receive a message on the Catalyst screen stating “Item(s) added successfully.” Click **OK**.
8. Rename the requisition in the **Requisition Name** field, if needed.
9. Click **Save**

Figure 3: RoundTrip Screen



Submitting the Requisition (Checkout)






When you are ready to submit the requisition, click the **Checkout** tab. At this time, make any necessary changes or additions. Several functions can be performed during the Checkout process.

1. Click the **Checkout** tab (Figure 3).
2. If necessary, click one or more of the following links to add information at the requisition header level; otherwise, continue with Step 3.
 - **Attachments** - Add an attachment (vendor quotes, specifications) to the requisition; for internal purposes only. Click **New** and follow the steps on the screen.
 - **Justification** - Enter a business justification for the requisition, such as why you are ordering the item(s). The approver will see this information immediately.
 - **Approval preview** - View the approval workflow for the requisition. This feature allows you to see who is next in line to approve your requisition. For more information, see the “Using the Approval Preview Feature” of this card.
3. If necessary change the Quantity for any line item(s).
4. If you need to add/change any information on the requisition, click the appropriate icon in the **Actions** column (described in the table below).

Figure 3: Checkout Screen



5. If applicable, enter or select the **G/L Account code** and/or **Project Code**.
6. Click **Submit**.
7. Click **OK**.

Actions Icons	
	Edit SPR – Use this icon to edit any SPR item the information.
	Item Details – Use this icon to edit any of the following information: Bill To/Ship Address, Requested Delivery Date, Payment Method and Special Instructions (refer to the section, “Changing Item Details” for more information)
	Delete – Use this icon to delete the item from the requisition; this cannot be undone.
	Add Bill Only Information – Displays the Bill Only Information screen, which allows you to make the item a bill only item or a bill and replace item. For more information, see the “Using the Bill Only Feature” section of this card.
	Add Item Cost Distribution information – Displays the Item Cost Distribution screen, which allows you to specify percentages (totaling 100%) of the item’s price between selected cost centers. Currently only one cost center may be selected.

Need More Help?



- Online Help is available through the Help link at the top of every screen
- To schedule and attend a training webcast, send email to training@ghx.com
- For customer support, contact GHX Customer Relations at: 1.800.YOUR.GHX (1.800.968.7449) Monday to Friday, 5:00 A.M. through 6:00 P.M. MST or by email at support@ghx.com.