

Purchase Order Requisitions


Example: Creating a Requisition for Airline Tickets from Adventure Travel

The following instructions will assist you in creating a Purchase Order Requisition to purchase airline tickets from UAB Adventure Travel. Effective April 12, 2010 Purchasing Services will **only** accept airline ticket requests made via the Purchase Order Requisition form. Hardcopies of airline ticket requests will no longer be accepted.



Before creating the Purchase Order Requisition, contact UAB Adventure Travel at (205) 444-1133 to obtain an airline itinerary and Booking Locator Number. This information is very important and will be needed for the requisition. Note that only one airline ticket can be secured per requisition. In addition, if you are seeking to secure an airline ticket involving foreign travel, prior approval will be required. Visit the following website to request approval for foreign travel: www.uab.edu/uabforms

UAB FN Document Entry/Approval → Purchasing: Requisitions → Requisitions
UAB Requisition Input → Requisitions → Requisitions

1. After following one of the above paths according to responsibility access, the requisition form will appear. Click in the Descriptive Flexfield (DFF)  that is located under the **TOTAL** field.
2. Enter the following in the identified fields listed below:
 - a. **ORDER METHOD:** Enter **Phone** as the order method here.
 - b. **DELIVER TO:** Enter **your name** here.
 - c. **BUILDING ROOM:** Enter your building and room number here. To access a list of the building codes at UAB, click [here](#).
 - d. **REQUESTER'S PHONE #:** Enter your phone number (preferably with all seven digits) here.
 - e. **REQUESTER'S EMAIL:** Enter your UAB email address here.
 - f. **DEPARTMENT NAME:** Enter your department name here.
 - g. **EXPIRATION DATE:** Leave this field blank.
 - h. **DO SCANNED DOCUMENTS EXIST?:** Enter a **Y** here. A copy of the itinerary obtained from UAB Adventure Travel and the foreign travel approval email notification (if applicable) will need to be faxed into WebIT.
3. Click on the **OK** button.
4. On the **LINES** tab, click in the **CATEGORY** field and enter **Travel.Services**

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- Go to the **DESCRIPTION** field and enter the following:
 - Full name of the traveler
 - Dates of travel
 - Points of Travel



Tip! The **DESCRIPTION** field can contain more information than shown. An example of an acceptable description could be:

Ann Case Traveling 30Jan10 to 07Feb10 BHM/DFW/LHR/LUN/LHR/DFW/BHM

- Click in the **UOM** (Unit of Measure) field and enter **Each**
- Enter **1** in the **QUANTITY** field.
- Enter the total amount of the airline ticket (including all applicable fees) as quoted by UAB Adventure Travel in the **PRICE** field.
- Click in the flexfield that is located next to the item line.

| Num | Type | Item | Rev | Category | Description | UOM | Q |
|-----|-------|------|-----|-----------------|-----------------------|------|---|
| 1 | Goods | | | Travel.Services | Ann Case Traveling 30 | Each | 1 |

- The **REQUISITION LINES** form will appear. Enter the **Booking Locator Number** obtained from UAB Adventure Travel in the **AIR TRAVEL REFERENCE** field. The **CONTRACT/QUOTE #** field can remain blank.

Requisition Lines

Contract/Quote #

Air Travel Reference

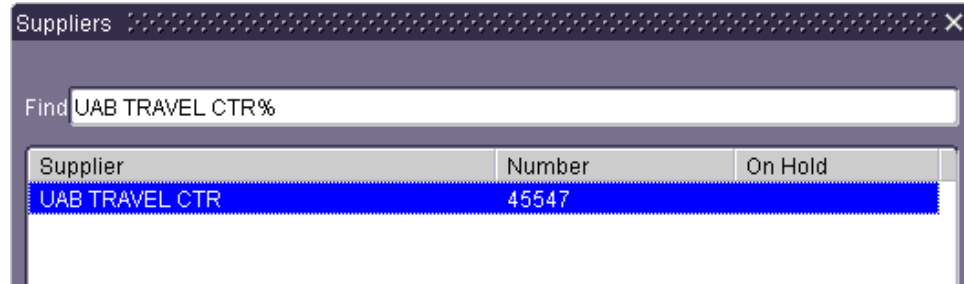
OK Cancel Clear Help


- Click on the **OK** button.
- Click in the **ORGANIZATION** field found near bottom of the form and click on the **LIST OF VALUES (LOV)** button to populate the field with the organization name, **UAB Operating Unit**.

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13. Enter in the **LOCATION** field the desired delivery location (*Deliver to Dept*).
14. Click in the **SUPPLIER** field and click on the **LOV** button to search for the airline supplier. Enter **UAB Travel%** in the **FIND** field and then click on the **FIND** button. You should search for and select **UAB TRAVEL CTR** with supplier number **45547** as shown.



15. After selecting the correct supplier, click on the **OK** button.
16. Click on the **LOV** button in the **SITE** field. The system should populate this field with the site name that is assigned to the UAB Travel Ctr (*P-BIRMINGHAM*)
17. Leave the **CONTACT** and **PHONE** fields blank.
18. **Save** your information by clicking on the gold diskette icon  that is located on your toolbar. If you find an error pop-up on the screen, click on the **OK** button. A requisition number should appear in the **NUMBER** field in the top left-hand corner of the form.
19. Write down the requisition number. You will need it when creating the barcode page.
20. After saving your requisition, click on the **DISTRIBUTIONS** button that is located at the bottom of the form.
21. The **DISTRIBUTIONS** form will appear. Enter the appropriate UAB account(s) and object code that is to be charged.
 - a. **If you are using a General Ledger (GL) account:**
 - i. Click in the **CHARGE ACCOUNT** field on the **ACCOUNTS** tab. (Click on the **OK** button if you see error pop ups on the screen.)
 - ii. Click on the **LIST OF VALUES (LOV)** button in the **CHARGE ACCOUNT** field.
 - iii. When the **ALIAS** form appears, enter the first and second segments of your General Ledger (GL) account string and then click on the **OK** button.
 - iv. The **CHARGE ACCOUNT** form will appear. Enter the **applicable** travel object code in the **OBJECT** field. (To secure airline tickets, you will use one of the following travel object codes: 8301010, 8301040, 8301041, 8302010, 8302020, 8302030, 8302040, 8302050, 8302053)

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- v. After entering the object code, click on the **OK** button.
- vi. **Save** the information and then close the **DISTRIBUTION** form.

b. If you are using a Grant (GA) account:

- i. Click on the **PROJECT** tab.
- ii. Enter the project number in the **PROJECT** field.
- iii. Enter the task number in the **TASK** field.
- iv. Enter the award number in the **AWARD** field.
- v. Enter the **applicable** travel object code in the **EXPENDITURE TYPE** field. (To secure airline tickets, you will use one of the following travel object codes: 8301010, 8301040, 8301041, 8302010, 8302020, 8302030, 8302040, 8302050, 8302053)
- vi. Enter the organization number in the **ORG** field.
- vii. Enter the current day's date in the **DATE** field (click on the LOV button to access the calendar and then click on the **OK** button. This will populate the field for you).
- viii. **Save** the information and then close the **DISTRIBUTION** form.

22. To approve the requisition, click on the **APPROVE** button that is located at the bottom of the form.

23. The **APPROVE DOCUMENT** form will appear. Click on the **OK** button.



Note! Since airline tickets must be fully booked/approved within **24 hours** of obtaining a quote from UAB Adventure Travel, it is the department's responsibility to contact their workflow approvers to let them know that an Airline Ticket Requisition is in their queue for approval. Requestors can use the Document Locator menu option in Oracle to determine where the Airline Ticket Requisition is at any time.

24. Fax the itinerary received from UAB Adventure Travel and a copy of the foreign travel approval email notification (if applicable) into WebIT using the Purchase Order Barcode. To access the Purchase Order Barcode form, use one of the following paths: UAB FN Document Entry/Approval → POUAB Purchase Order Barcode or UAB Requisition Input → POUAB Purchase Order Barcode.

25. When the form appears, enter the following information in the identified fields:

- a. **SUPPLIER:** Enter **UAB Travel Ctr** as the supplier here.
- b. **SUPPLIER NUMBER:** Enter **45547** here.
- c. **REQ NUMBER:** Enter the Purchase Order Requisition number that was assigned by the system here.

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- d. **BUSINESS EXPENSE:** Enter the detailed UAB business purpose for this trip. This should include name of conference (if applicable), purpose of travel, status of the traveler (i.e. employee, trainee, recruit, etc.). **Do not use abbreviations.**

26. The completed PO Barcode form should look similar to the form shown. Click on the **CREATE BARCODE** button located at the bottom of the form to produce the barcode page.

The screenshot shows a web form titled "PO Barcode". The form contains the following fields and values:

- * Supplier: UAB TRAVEL CTR
- * Supplier Number: 45547
- Date: 04/01/2010
- * Req Number: 443053
- Business Expense: UAB employee, Ann Case traveling from Birmingham, AL to Miami, FL on June 1, 2010 for a Center for Disease Control (CDC) conference.

At the bottom of the form, there is a button labeled "Create Barcode".

27. The barcode page will appear with the information that has been entered. Click on the **PRINT BARCODE** button that is located at the bottom of the form.
28. The **PRINT** window will appear. Select the desired printer and then click on the **PRINT** button.
29. Fax the barcode page, the itinerary obtained from UAB Adventure Travel and the foreign travel approval email notification (if applicable) to the WebIT imaging system at extension **6-4701** (996-4701 if off campus).
30. Close the form by clicking on one of the **CLOSE WINDOW** links that are located in both the top right-hand corner and bottom center of the form.

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Congratulations! You have just completed the Purchase Order Requisition airline ticket process! If changes need to be made to the request after the Purchase Order number has been assigned, such as increases in price, changes of the travel dates, etc., contact Purchasing Services at (205) 934-4515.