# Directions for Completing Purchase Requests

1. Check **New** if a new order is to be processed, or **Change** to modify either an existing purchase order or a requisition.
2. Check either the **NIU** box or the **FDN** box to charge expenses to NIU or to Foundation funds. Check the **NIU** box if you are using GRANT funds.
3. If this is a new requisition, leave the **Requisition No.** box blank. If this is a change to either a purchase requisition/order, write the purchase requisition/order number in the **Requisition No.** box.

**Date and Department:** Enter current date and complete name of department
submitting the information.

**Requestor and Telephone:** Fill in the name and phone number of the person requesting this purchase. If the number does not start with “753”, enter the area code and number.

**Entered By and Telephone:** Fill in the name and phone number of the person entering the information. If the number does not start with “753”, enter the area code and number.

**Vendor:** If the vendor already exists on the vendor file, enter the name. For new vendors, enter complete name, address, phone, and fax information. (Please no abbreviations.) Second vendor is optional.

If this purchase is above the current bid limits, and must be secured from a single vendor (“sole sourced”), complete the required documentation on the workbook tab pages (see bottom of form) titled “Sole Source Vendor Justification”.

One or more of the checkboxes should be marked along with a description that provides further detail.

**Department Use/Page Box:** For requisitioning department internal user. Page number identification should be used.

**Delivery Location:** If all items ordered are to be delivered to one location, enter the department name, building, and room number of that location.

**Fund Distribution:** All boxes in this section must be completed for each fund source to be charged. The Project/Grant code must be entered only when a grant is to be charged.\*\*

**Amount Grand Total:** Enter Grand Total of amount entries in Fund Distribution section.

**Requisition Line Column:** Each item ordered should be sequentially numbered (1,2,3…). When there are multiple fund sources, you must note in the description column a corresponding letter from the Fund Distribution line that you want the item charged to. (For example, the first item may be charged to fund distribution line “c”. Note this in the Description column.) If an item is to be charged to more than one fund source, indicate the corresponding letters and dollar amount from each fund source (example:a-$10.00 & b-$5.00) in the Description.

**Quantity and Unit**: Enter quantity needed, and the unit of purchase to be ordered, such as: each, box, case, yard, gallon, etc.

**Unit Price:** Price per unit of purchase.

**Description:** Description of the item to ordered. If more room is needed, click on the “Additional Descrptn & Comment” worksheet tab and enter the additional information as a comment. Make a reference in the description field to see that comment.

**Deliver To:** When the items ordered are to be delivered to multiple locations, enter the department, building, and room number for each item.

**Extended Line Amount:** Enter the extended total cost for the quantity ordered of each item.

**Grand Total:** Enter the Grand Total of entries in the Extended Line Amount column. NOTE: THIS AMOUNT MUST EQUAL THE GRAND TOTAL IN THE FUND DISTRIBUTION SECTION.

**Date Needed:** Enter a realistic date. Avoid the use of terms such as “RUSH” and “ASAP”.

**\*\*Split Funding:** Multiple distribution for multiple items where more than one distribution pays for part of several item. Use the letter and the number to the left of Fund Distribution and Requisition Line respectively and note the dollar amount to be used for the combination. This will noted in the field titled Item Fund Distributions. An example follows for a requisition with two distributions and three items.
A – Distribution 1: 75.00
B – Distribution 2: 75.00
1 – Item 1: 50.00
2 – Item 2: 50.00
3 – Item 3: 50.00
A – 1- 50.00 all of item 1 is paid from distribution A.
B – 2- 50.00 all of item 2 is paid from distribution B
A – 3- 25.00 & B – 3- 25.00 item 3 is paid from split between distribution A & B.

**Note**: If the invoice is for more than the requisition/purchase order, the system will pro-rate the average over the distributions. If a department will not be contributing more than a specific amount, an internal journal entry initiated by the department may be needed after payment to transfer funds.

Save the form under a unique file name (such as your department reference number, top left of the form.)

If there are no attachments and there is only one authorized signature required, email the form to AccountingOffice@niu.edu. If there are either attachments or multiple signatures required, print out the completed form, obtain the appropriate signatures on the hard copy, include attachments, and forward the authorized document to Accounting.