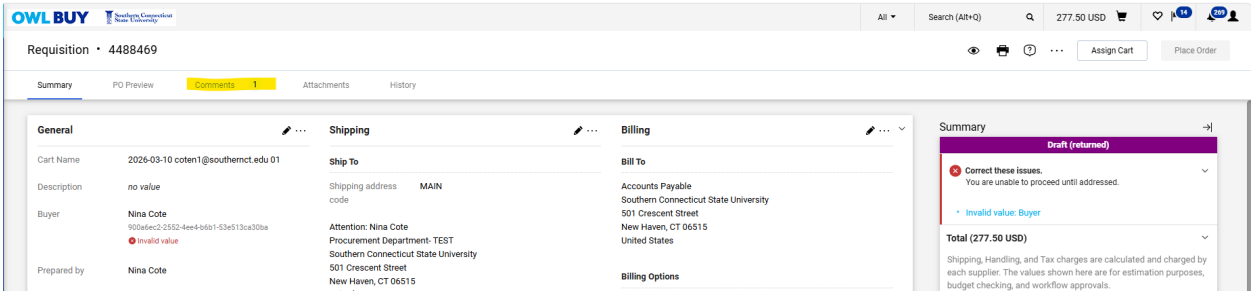
Preparing and Submitting a Requisition

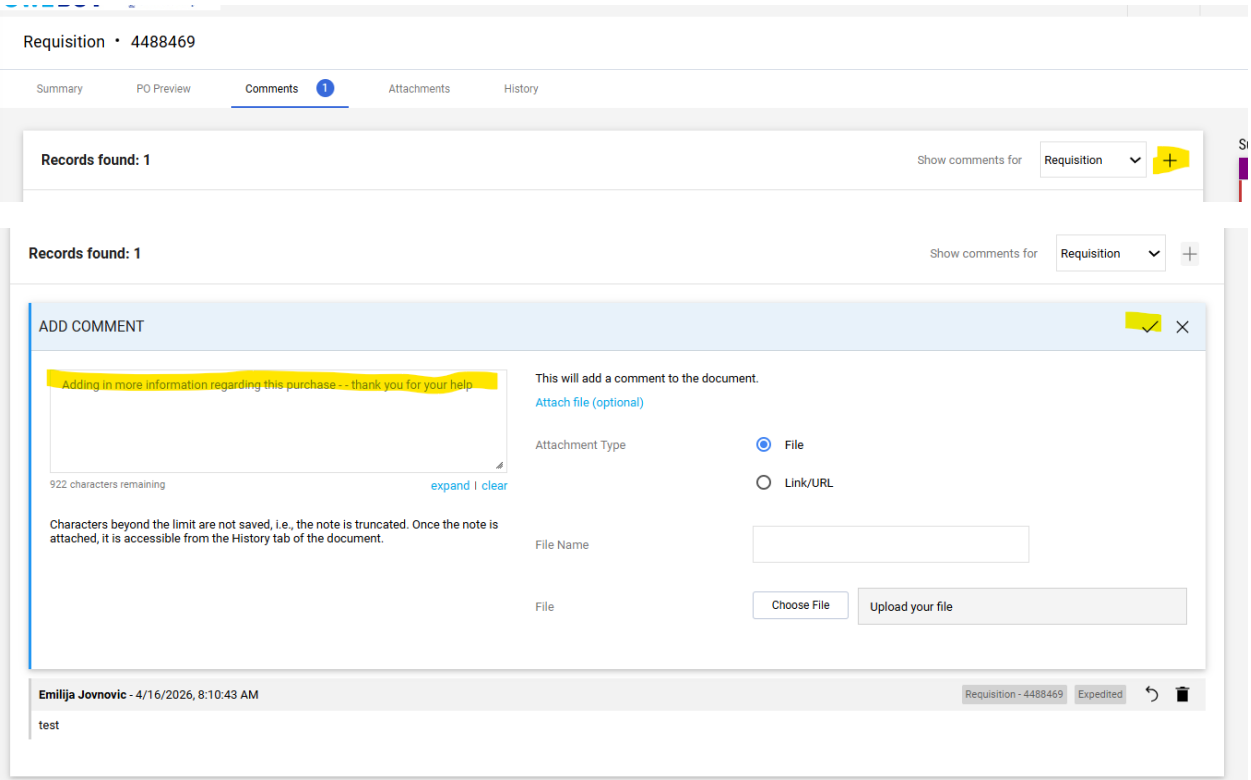
1. Reviewing Your Cart Before Checkout

- Before proceeding to checkout, review all items in your shopping cart to ensure the purchase is complete and accurate. Verify the following:
    - Item descriptions
    - Quantities
    - Pricing
    - Accounting information
    - Supplier information
    - Required attachments
    - If changes are needed, update the cart before moving forward with the requisition process. Taking a few moments to review your cart can help prevent delays caused by returned requisitions.

2. Adding Comments and Attachments

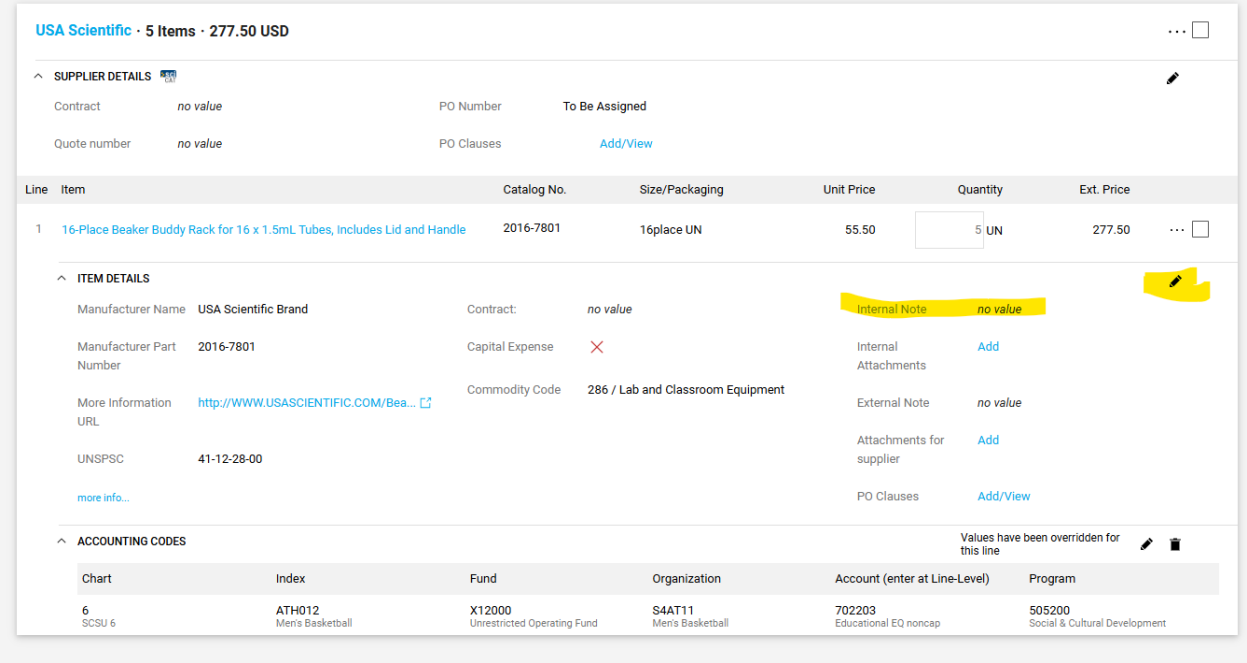
- Comments and attachments provide additional information to approvers and Procurement Services. To add a comment or attachment:
    - Open your shopping cart.
    - Navigate to the checkout page.
    - Select the **Comments** tab.
    - Select the + sign.
    - Enter your comment.
    - To attach a document, select **Add Attachment**.
    - Upload the required file(s).
    - Select the check mark.

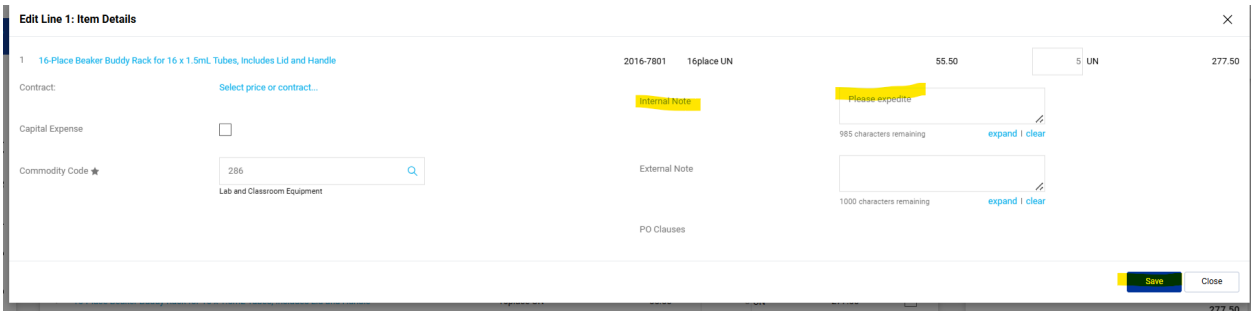




3. Adding Internal Notes

- Internal Notes can be added to a cart or requisition to provide additional information for approvers, buyers, or other members of the procurement process. These notes are not sent to suppliers and are intended for internal use only. To add an Internal Note:
    - From your shopping cart, locate the **Internal Note** section.
    - Select the pencil icon.
    - Enter the information you would like to share with approvers or procurement staff. Please keep notes concise and professional.
    - Select **Save** to add the note to the requisition.

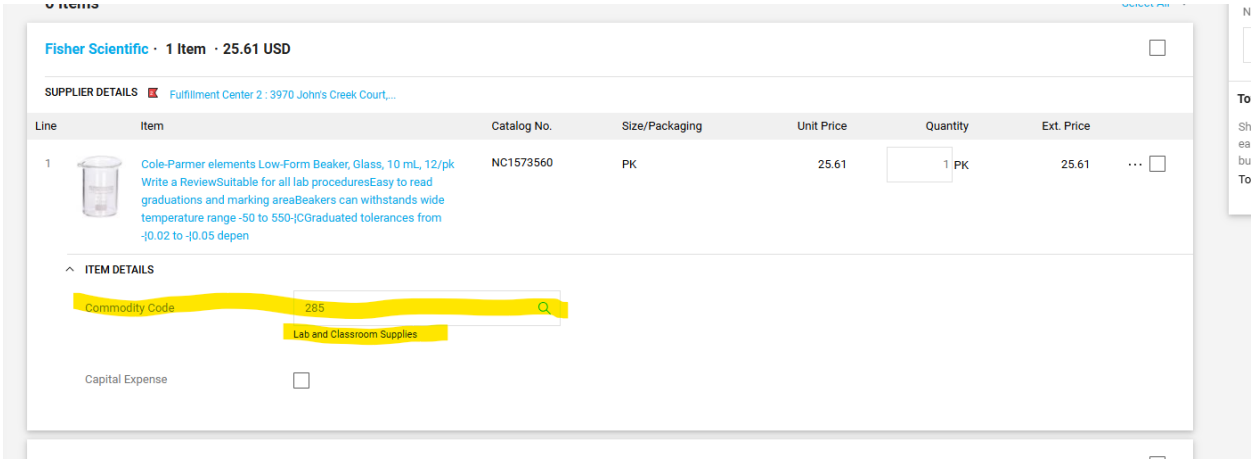


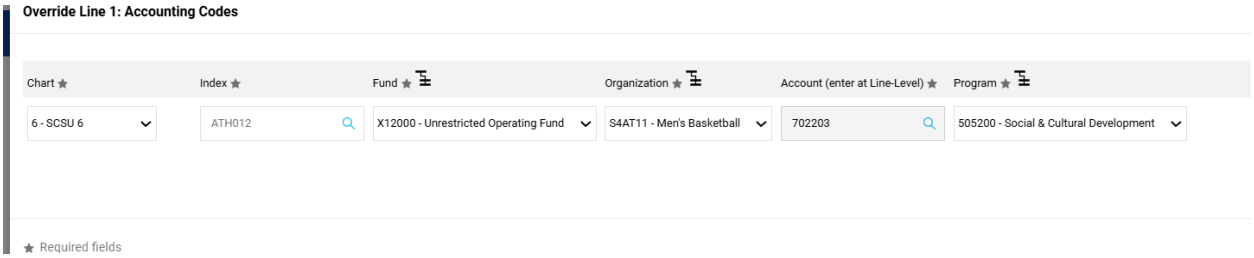


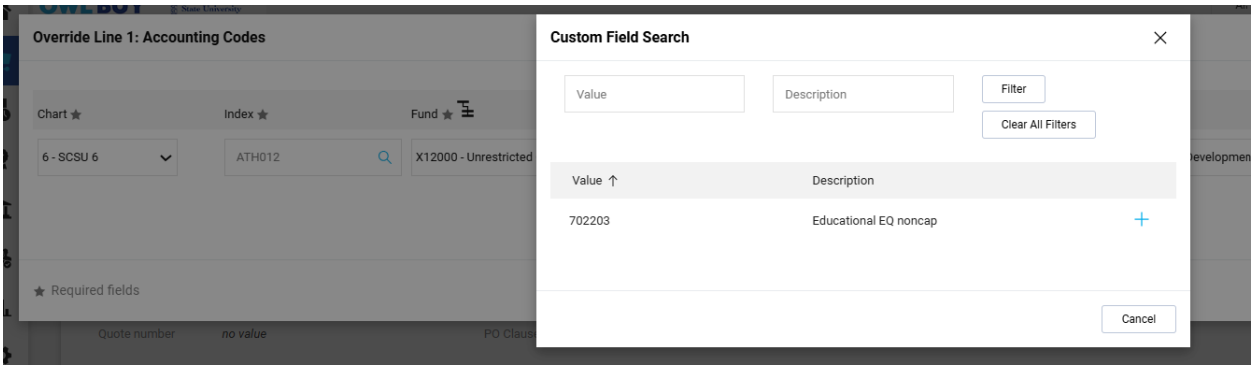
4. Selecting an Appropriate Accounting String

- OWL Buy uses **Commodity Codes** and **Accounting Strings** to ensure purchases are recorded correctly and charged to the appropriate funding source.
- **Commodity Codes:** A **Commodity Code** identifies the type of product or service being purchased. Commodity codes are assigned to catalog items and non-catalog requests and help classify purchases for reporting, budgeting, and procurement purposes.
    - Commodity codes are linked to specific account codes within the University's financial system. As a result, the commodity code selected on a requisition will limit the account codes available for selection, helping ensure that purchases are charged to the appropriate account.
    - For many catalog items, the commodity code will be assigned automatically.

- If a commodity code is not pre-populated, the Shopper must select the commodity code that best describes the item or service being purchased.
- **Example:** Lab and Classroom Supplies – Commodity Code 285 is limited to Account Code 702203 and will automatically default.







- **Selecting an Index:** The **Index** identifies the funding source that will be used to pay for the purchase. ***During checkout:***
  - Navigate to the **Accounting Codes** section.
  - Enter or search for the appropriate **Index**.
  - Once selected, the associated **Fund**, **Organization**, and **Program** values will automatically populate.
  - Verify the information is correct before proceeding.

        - **Important:** The first step in the Purchase Requisition workflow is a budget check. If sufficient budget is not available, the purchase requisition will fail and be returned to a draft cart.
- **Header vs. Line-Level Accounting:** Accounting information may be entered at either the **Header** level or the **Line** level.
    - **Header Accounting-** Header accounting applies the same accounting string to all line items in the requisition. Use Header Accounting when:
        - All items are being charged to the same Index.
        - All items use the same funding source.
        - No allocation between departments or funds is required.

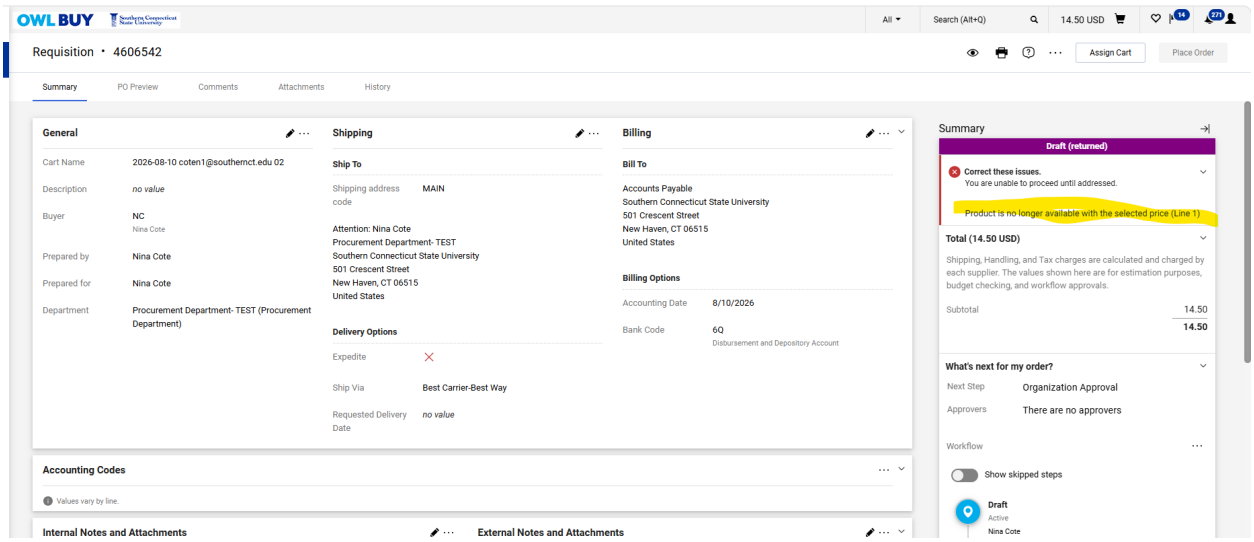
      This is the most efficient method when all purchases are being charged to a single budget.

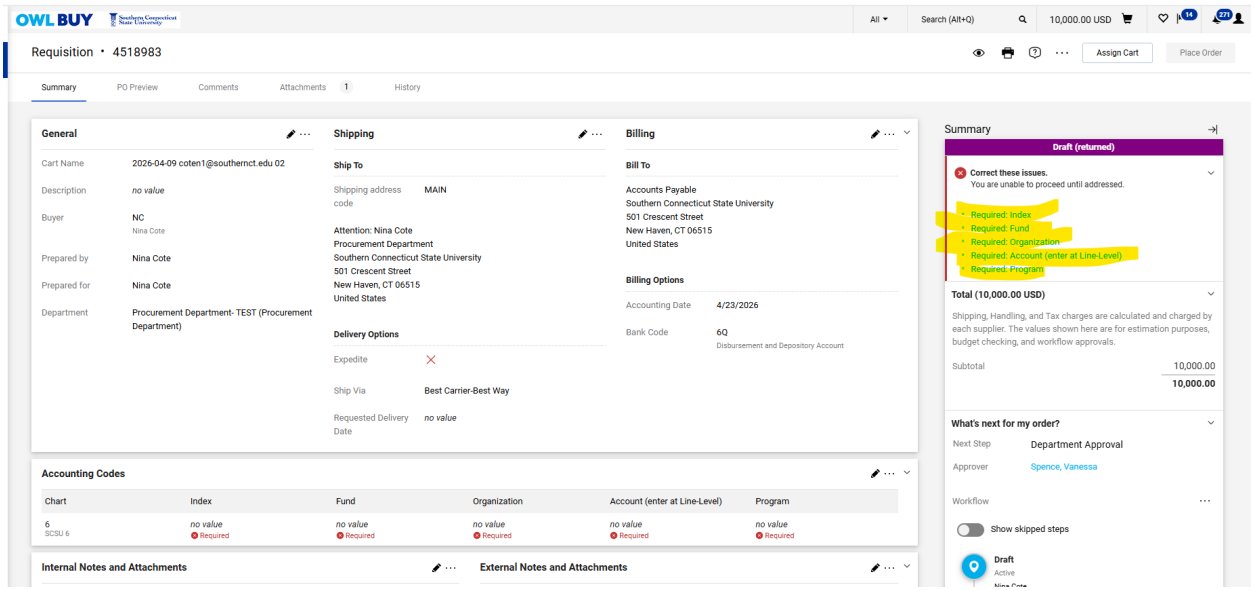
- **Line-Level Accounting-** Line-level accounting allows different accounting strings to be assigned to individual line items. Use Line-Level Accounting when:
    - Different items are being charged to different Indexes.
    - Costs need to be split between departments, grants, or funding sources.
    - Certain items require different account classifications.

1. Submitting a Requisition for Approval

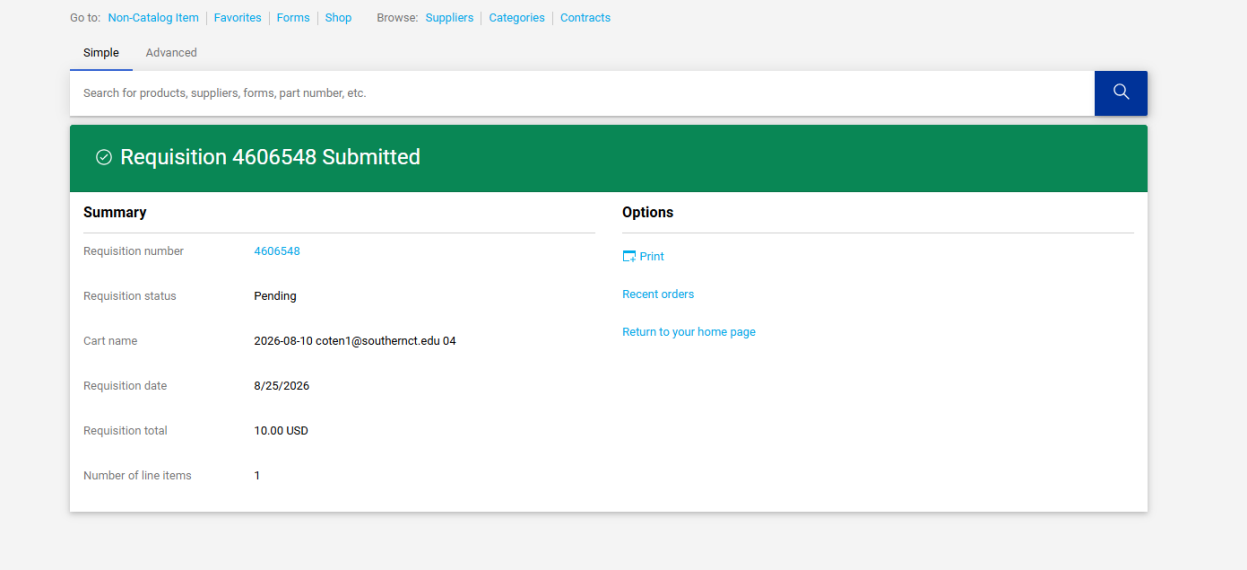
- Once all required items have been added to your cart and the necessary information has been completed, the requisition must be submitted for approval. To submit a requisition for approval:
    - Review all cart details, including accounting information, supplier information, and item quantities.
    - Resolve any validation errors displayed on the cart (Examples below).
    - Select **Proceed to Checkout**.
    - Verify that all required fields are completed on the requisition.
    - Select **Place Order** to submit the requisition into the approval workflow.
    - After submission, the requisition status will change from **Draft Cart** to **Submitted** and will be routed to the appropriate approvers based on SCSU's approval rules.

Error Examples:





Once Requisition is submitted to the Workflow:


Go to: Non-Catalog Item | Favorites | Forms | Shop Browse: Suppliers | Categories | Contracts
Simple
Advanced
Search for products, suppliers, forms, part number, etc.
Requisition 4606548 Submitted
Summary
Requisition number 4606548
Requisition status Pending
Cart name 2026-08-10 coten1@southernct.edu 04
Requisition date 8/25/2026
Requisition total 10.00 USD
Number of line items 1
Options
Print
Recent orders
Return to your home page