PEOPLESOFTR INTERIM REQUISITION APPROVAL PROCESS

Monthly Purchasing Transactional Log

Instructions:

End users must obtain approval prior to creating a requisition in PeopleSoft. Using the transactional log will allow users to reconcile purchases made on a monthly basis. This process will be used in the interim, until PeopleSoft workflow is turned on.

This form must only be used when processing a purchase request (requisition) that is less than or equal to $5,000 and does not meet the criteria listed below. If an order does need to be placed for following, use the UTShare SharePoint Requisition Request Form to obtain approvals.

Note: DO NOT use the monthly transactional log if:

1. Funding involves Grant or Special Project chart of accounts
2. A foreign vendor will be used to purchase the good or service
3. Purchasing one of the following types of commodities:
   a. Lasers/X-Ray Equipment – user is placing an order for a laser or x-ray equipment for research, laboratory, and/or research training, the order must be approved by Environmental Health Safety and Risk Management.
   b. Laboratory Animals - user is placing an order for animals to be used for research or training, equipment for animal research or training, and/or services (e.g., veterinarian services) for animal research or training, the order must be approved by the Laboratory Animal Research Center
   c. Fleet - user is placing an order for a motorized vehicle, to include but not limited to trucks, vans, cars, golf carts, or products/material for a motorized vehicle, the order must be approved by the Facilities Fleet Management Office.
   d. Facility Services - user is placing an order for construction, renovation, or building maintenance and repairs, the order must be approved by the Facilities Engineering and Project Management Office.
4. Purchasing Radioactive and/or Controlled Substances, a specific Radioactive and Controlled Substance SharePoint request form will need to be used.
5. Orders over $5K, to be processed by Central Purchasing.

Filling out the form:

End users will need to list each transaction made monthly, at the end of the month the account administer (budget authority) and department approver will need to sign each month.

If multiple accounts are being used, list the transactions, but ensure each speedchart used has been approved by their respective account administer (budget authority) and department approvers.