



Prepare to Procure

August 16, 2013

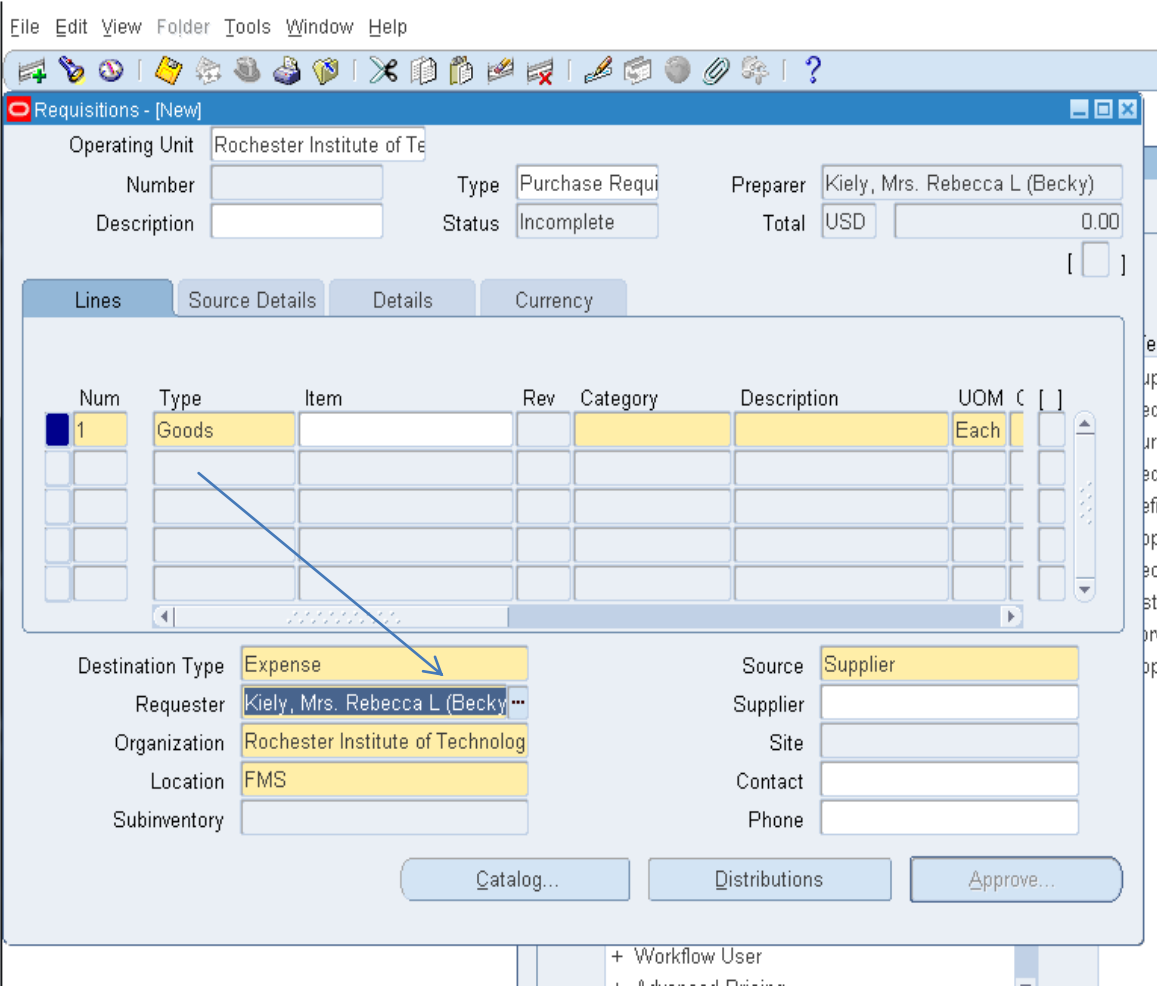
RIT Procurement Services
475-2107

<http://www.rit.edu/fa/procurement/purchase@rit.edu>

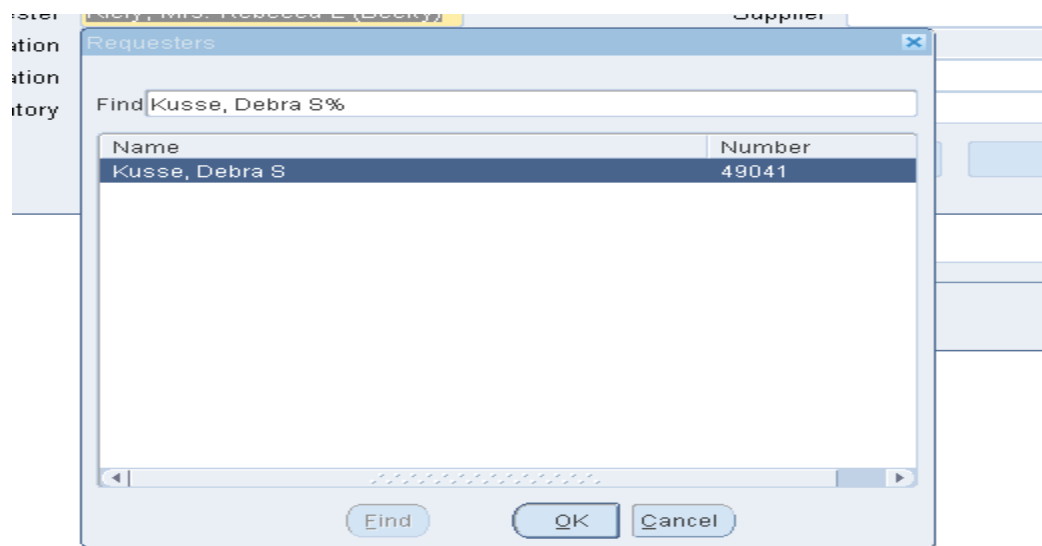
Preparing a Requisition Changing the Requestor Name

The person who prepares the requisition is the preparer; their name automatically defaults into the requisition as the requestor and again on the purchase order. When the preparer will not actually receive what is being ordered, is not the end-user of the item(s) being ordered, or will not be involved in receipt of the service being provided, it is important to change the name of the requestor to the correct individual. **Changing the name of the requestor will facilitate timely and accurate delivery of goods from the Shipping and Receiving department.**

- 1. To change the requestor name, click on the list of values button for the "Requester" field



2. When the search box pops up, type the percent sign and the last name of the individual to be listed as the requestor (e.g. %Kusse) – then highlight their name when it appears on the list of values.



3. Click "OK"; the name will populate into the Requester field. At the same time, the location will change from the Preparer's building to the Requester's building.

Once packages are unpacked and goods are inspected, remember to send packing slips/bills of lading to Shipping and Receiving (FMS, building 99 - snlpre@rit.edu or fax 475-7332); the staff require the information to post the receipt in Oracle. Confirming receipt of the goods with a packing slip is an important control in the procure-to-pay process; failure to provide this information to Shipping and Receiving delays the supplier payment process.

If you have any questions about how/when to change the name of the requestor on a requisition, please contact Procurement Services at 475-2107 or purchase@rit.edu.

