

Quick Reference Guide – Entering a Requisition for Equipment

Let's say you want to order a **freezer**. We'd start by searching for the freezer in the Penn Marketplace.

- Note: Only **seven (7)** lines can be included on an Equipment requisition.
 - Best Practice: It is recommended that the Equipment requisition and the 'maintenance' for the equipment be done on **separate requisitions**.
- Click on **[Return to BEN Buys Shopping Cart]**
 - Click on **[Proceed to Checkout]**
 - After the Delivery and University Contact information have been reviewed and/or entered, the Review Charge Accounts screen appears:

For Non-Catalog Items Order
In the 'Item Description' field be sure to include a full English language description, including the Manufacturer name and the Model number.

Review Charge Accounts

Click on a Charge Account link to edit or allocate the item cost to multiple accounts.

Line	Item Description	Unit	Quantity	Price	Total (USD)	Charge Account
1	Chest Style Freezer with Built In Alarm Battery Back Up and Three Position Key Switch 3.1 CF -40 to -86 DD CE Recco Elite, 1/EA	Each	1	5,520.00	5,520.00	XXXXXXXXXXXX5728XXXXXX
					Total (USD)	5,520.00

Clear Checkout Changes and Return to Shopping Cart

Check Funds Continue

Choose a nickname from the favorite charge accounts maintained in your personal profile to populate the charge account information for the selected line item. Press the OK button when you're finished.

Nickname	CNAC	ORG	B/C	FUND	OBJ	PROG	CREF
None	020	0102	1	000000	1832	4450	0000

When entering the account number for a property item, you are required to change the **default object code** to one of the following object codes:

- **1830** Furniture and Fixtures
 - e.g. a custom table
- **1831** Computer Equipment
 - e.g. a server
- **1832** Other Capitalized Equipment
 - e.g. research equipment
- **1833** Capitalized Equipment Repairs(*should extend useful life of equip*)
 - e.g. repair a microscope
- **New! 1834** Equipment in Process
- **New! 1835** Internal Use Software
- **New! 1850- 1852** Collectibles

After checking funds, entering your requisition description and/or a note to the Approver, you'll arrive at the 'Review and Submit Requisition' screen.

- Click on **View**
- Click on **Add Attachments**
 - Select '**Miscellaneous**' from the drop-down box and attach a note to the Purchasing Department (required for all Requisitions over \$5,000).

Upon returning to the '**Review and Submit Requisition**' you can review your requisition. If all is good, click on **[Submit]**

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The Property Management screen appears. These fields must be completed as instructed below:

The screenshot shows a web browser window with the URL <https://coltrancasac-sewpaupenn.edu/001>. The page title is 'Requisition - Enter Property Management Information - Microsoft Internet Explorer'. The 'bon buys Requisitions' logo is at the top left. The main heading is 'Property Management (Requisition 899931)'. Below it, a note says '* Indicates a required field'. The form is titled 'Enter property management information' and has a 'MORE ->' link. The form contains several fields: 'Line', 'Description', 'BLDG-FLR-RM', 'Category Code', 'Responsible Organization', '* Govt. Retain Title?', '* Custodian of Item', '* Custodian Telephone', '* Tagging Contact', '* Tagging Telephone', and '* Component?'. A callout box explains the flashlight icon: 'The flashlight indicates the field has a list of values. Typing a partial value or keyword will narrow the search for the desired item. Type the partial value; click on the flashlight; click on [Go]; [Select] desired item.' The form is filled with the following data: Line 1, Description 'Chest Style Freezer with Built In Alarm Battery Back Up and Three Position Key Switch 3.1 CF -40 to -66 DD CE Rexco Elite; 1/EA', BLDG-FLR-RM '0155-4-409', Category Code '24001 - REFRIGERATION EQUIPM', Responsible Organization '0102 - ASIAN/MIDEAST ST', * Govt. Retain Title? 'N', * Custodian of Item 'VETTATH, SUDHA 430', * Custodian Telephone '215-898-1234', * Tagging Contact 'WHITE, ROBERT J. 100', * Tagging Telephone '215-898-5678', and * Component? 'N'. There are 'Continue' and 'Cancel' buttons at the bottom right.

1. **Description** – Defaults from the Penn Marketplace

For equipment items ordered on a Non-catalog requisition, the Description must include an English language description of the item including the Manufacturers name and Model #.

2. **BLDG-FLR-RM** – This is where the item is being placed for use. Select the Bldg/Floor/Room from the drop down box

The Building, Floor and Room information here should match the information found in Space@Penn and/or Facilities. For additional information on University Buildings go to:

<http://www.facilities.upenn.edu/mapsBldgs/>

3. **Category Code** – From the drop down box select the most accurate description of the item being purchased.

The category field drives the appropriate depreciation method, i.e. the number of years the item will be depreciated. If the wrong category is selected the wrong depreciation amount will be expensed.

4. **Responsible Organization** – This defaults from the organization number(s) entered on the first line of the account entered; type or select the appropriate responsible organization for the property item.

5. **Govt. Retain Title?** – For Sponsored Programs, the government may retain title. If so, select 'Y', if not, leave 'N'.

6. **Custodian of Item** – From the drop down box, select the individual that is responsible for the property item. This is frequently, but not necessarily, the person that is using the item.

Custodians must be employees of the University.

7. **Tagging Contact** – From the drop down box, select the name of the person who is to receive the property tag(s) from their Senior BA/Asset Administrator.

Tagging Contacts must be employees of the University.

8. **Component of Existing Asset?** – Select 'Y' if purchase is component of an already existing asset. Otherwise select 'N'.

9. Click on **[Continue]** to complete the Requisition process

Property Management Group

Web page:

<http://www.finance.upenn.edu/comptroller/accounting/property/>