Purchasing Thresholds
Per Procurement Services Policy 1, the following thresholds, and requirements, must be adhered to when creating purchase requisitions:

<table>
<thead>
<tr>
<th>Threshold</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>$4,950 - cumulative</td>
<td>BRC</td>
</tr>
<tr>
<td>$6,420</td>
<td>3 Quotes</td>
</tr>
<tr>
<td>$17,500 – 2 yr approval</td>
<td>Chapter 51</td>
</tr>
<tr>
<td>$33,000</td>
<td>Public Bid</td>
</tr>
</tbody>
</table>

Category Codes with Additional Approvals
All the following category code will require additional or special approval. When searching for these category codes, please enter the following key words as a starting point:
- **OIT** - all IT related items/services - require IT buyer approval
- **PRN** - custom printing- require printing approval
- **CTR** - catering - require accounting approval, not Procurement approval
- **CR** - check requests

Attach to Line Items
When creating a requisition, comments and attachments should be added to the line level of a request, so that they are available to view by approvers.

1. From within the **Checkout – Review and Submit** screen of PeopleSoft, click the **Add** button on the appropriate line item to open the Attachments dialog box.

You can insert comments along with any relevant documentation.

When items are attached to a line, the Add button icon will change to read **Edit**.

Add Approvals
Additional approvers, or reviewers (parties that will have read-only access to the requisition) may need to be added to the approval flow of a requisition. Amend the preset approval flow to include these individuals on the Confirmation screen of the requisition.

1. Click the **green plus** sign next to the last approver’s name in the **Requisition Approval** box.

   ![Requisition Approval](image)

   A dialog box opens displaying search and selection options.

2. Click the **Search** button to enter the name of the additional individual.

3. Enter the search term and click **Search**.

4. Select the appropriate user name. **Note:** The selected approver must have requisition approval access already assigned to their profile.

5. Click **OK**.

You will be brought back to the **Insert** window.

6. Select the role for the adhoc approver.

7. Click **Insert**.

The Approval Flow will update to display the additional individual’s name and role.

Check Supplier Information
In order to have a purchase requisition approved in the system, the supplier must be confirmed in the system, and must have the appropriate documentation attached to their file. Suppliers must have a valid Business Registration Certificate (BRC) in the system, and, in some cases, an EO134/Chapter 51 Political Disclosure.

1. From the **Supplier Details** screen (Main Menu > Suppliers > Supplier Information > Add/Update > Supplier), scroll to the Government Classifications section.

2. Expand the **Government Classifications** arrow to view the valid certifications.

3. Review the certifications under the Government Sources section of the screen.

4. If there are no certifications, or the certification is invalid, contact Procurement Services to update the record.

   If there are additional certificates associated to this supplier, view them by selecting the Next button on the appropriate line in Government Sources.
**Requisition Settings**

When creating a Special Request requisition with multiple line items, you can set the supplier, and ship to information, if they are all the same, for the request.

1. From the Create Requisition screen, click the Requisition Settings link.

The Requisition Settings window will display.

2. Complete the fields in the window to be repeated for each line item. **NOTE: The Supplier MUST be the same for each line of an individual requisition.**

3. When you have completed all information to be repeated in your request, click the OK button.

The information you entered will appear on each line of your purchase requisition.

**Split Costs on Line Items**

When an item’s cost needs to be distributed among multiple departments, the requisitioner can assign portions of the cost to each department.

1. From the Create Requisition screen, select the Expand Arrow of the Accounting Line on the appropriate line item.

2. In the Accounting Lines section, click the Chartfields1 tab.

3. Click the plus sign to the right of the line item, to add another cost line.

4. Enter the accounting codes of the additional department and include the percent of expense for each line. **Note:** the overall percent of the line item MUST equal 100.

5. Click the Chartfields2 tab to enter the appropriate Chart of Accounts information for each line.

**Delegate Approval Authority**

When an approver will be out of the office for a certain amount of time, they can delegate their approval authority to another individual with at least the same system security.

1. From the Main Menu, select My System Profile.

2. On the General Profile Information screen, scroll to the Alternate User section.

3. Click the Search button at the Alternate User ID field to search for your delegate.

The Look Up Alternate User ID window displays.

4. Set the Search term as User ID or last name.

5. Enter your search term and select the Look Up button.

6. From the list of search results, double click on the appropriate name to select that person as your delegate.

You will be returned back to the General Profile Information screen.

7. Enter the start and end dates of the delegation period in the appropriate fields.

8. Click the Save button at the bottom of the window.

The system will route items needing your approval to your delegate for the selected period.

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**Procure to Pay (P2P) Quick Reference Guide**

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For assistance with PeopleSoft, please contact the IT Service Desk.

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