ABOUT PURCHASE REQUISITIONS (PRs)

A purchase requisition (PR) is an internal document that initiates the procurement process by communicating a need to the purchasing staff. It is required for purchases that exceed $20,000.

A purchase requisition is also known as a “PR,” “Req,” “PReq,” or “Requisition.”

For AASIS-using agencies, the PR is created by completing a transaction in AASIS. Agencies who do not use AASIS follow their own internal procedures for creating a PR.

HELPFUL HINT

A requisition is not required for a small order (SO), which is a purchase not exceeding $20,000. Small orders can be purchased with a State credit card or by creating a purchase order (PO) without a PR.

A PR is generally the first step in the procurement process.
Creating a Purchase Requisition

A PR consists of two types of information:

1. Actual purchasing data that was entered into AASIS as part of the PR transaction.

2. Supporting documents and other information relative to the procurement that are attached to the PR in AASIS.
   a. These attachments document the PR process and provide information to the buyer.

Each type of information consists of multiple elements.

HELPFUL HINT

The agency’s staff member who requests the purchase is often referred to as the “end user” because it is that State employee, or their staff, who will be using the purchased commodity or service.

The information for the PR may come from various sources.

If purchasing from an existing contract that has established costs and contractual terms:

- The PR data should be provided by the end user from the existing contract.
- The requisitioner can confirm the information from the existing contract.

If a new solicitation will be required:

- The end user should provide information about the commodity or service he/she wants to purchase (description, quantity, etc.)

End users are encouraged to conduct market research regarding his/her requested purchase.

To initiate a procurement, the requisitioner will create a purchase requisition for the desired commodity or service.

For instruction on creating a purchase requisition and how to execute each step in AASIS, go to the link for AASIS Steps for Creating a PR.
Initiating the PR Approval Process and Monitoring the PR Status

When the PR is saved with attachments, the creation process is complete, and you are ready to initiate the approval process.

A PR must be reviewed and approved by one or more approvers, depending upon the type of purchase and cost. These approvals must be completed before the PR can move to the next phase of the procurement process.

AASIS automatically determines the levels of required approvals. This ordered list of approvers is called the release strategy, and it auto-populates in the Release Strategy tab in the Header section. The requisitioner must initiate the approval process with the first approver, then AASIS automatically routes the PR through AASIS workflow for any remaining approvals.

HELPFUL HINT

An approval of a PR is also referred to as a “release.”

To learn more about initiating the PR approval process and monitoring the approval status, go to the link for **AASIS Steps for Initiating and Monitoring the AASIS Approval Process**.

When PR Approvals are Complete

When all approvals are completed, the PR is assigned to a buyer who facilitates the actual purchase.

- PRs with an Initial Contract Amount (ICA) under $75,000 are typically assigned to a buyer in your State agency.
  - Some agencies have a delegation authority to assign PRs with higher ICAs to internal buyers.
  - Each agency may have its own procedure for assigning PRs internally.
- PRs with an ICA of $75,000 or more are typically routed to TSS OSP to be assigned to a buyer in that office.
  - To route a PR to TSS OSP, open the PR with ME52N Change Purchase Requisition, change the Purchasing Group number to C00 in the header section of the PR, then save.
° The C00 designation triggers AASIS to automatically send the PR into TSS OSP’s workflow.

See your supervisor regarding your agency’s procedure for assigning a PR to a buyer.