UMOJA REQUISITIONING CHEAT SHEET

This cheat sheet has one purpose only - to improve your requisitioning life! Below, you will find the essential need-to-know process details and steps regarding the creation and approval of Shopping Carts.

REQUISITIONERS & APPROVERS:

CHECK THAT ALL BELOW ITEMS ARE IN SHOPPING CARTS!

PRODUCT ID
Know what you're buying!

Requisitioners and Approvers take heed! The wrong Product ID results in the wrong selection of materials, which produces inaccurate inventory!

INCOTERM FIELD

Make sure the right INCOTERM is selected.

HERE'S ONE TO REMEMBER:
THE INVENTORY FIELD

Remember to click the 'DIRECT MATERIAL' checkbox which sends your materials to inventory.

STORAGE LOCATION FIELD

This field is important for inventory ownership!

PLANT FIELD

This ONLY refers to the delivery location and should not be confused with the Storage Location field!

FIXED ASSETS

If you select an item that's an asset, i.e. the product ID starts with 21, you must create an asset record!

PROCUREMENT PURCHASE ORDER BUYERS & APPROVERS:

TAKE TIME TO REVIEW THE BELOW!

FIXED ASSETS

If line items in Shopping Carts begin with 21xxxxx (i.e. the 21 series), they are fixed assets. For fixed assets, check that the item values match the IPSAS definitions for those assets.

PRODUCT ID's!

Ensure that the Shopping Cart has a Product and/or Service ID! If any line item(s) do NOT contain ID's, the Shopping Cart should be rejected.

Updates cannot be made to Purchase Orders from Previous budget periods!

Need more help? Here's the Umoja Requisitioning User Guide.