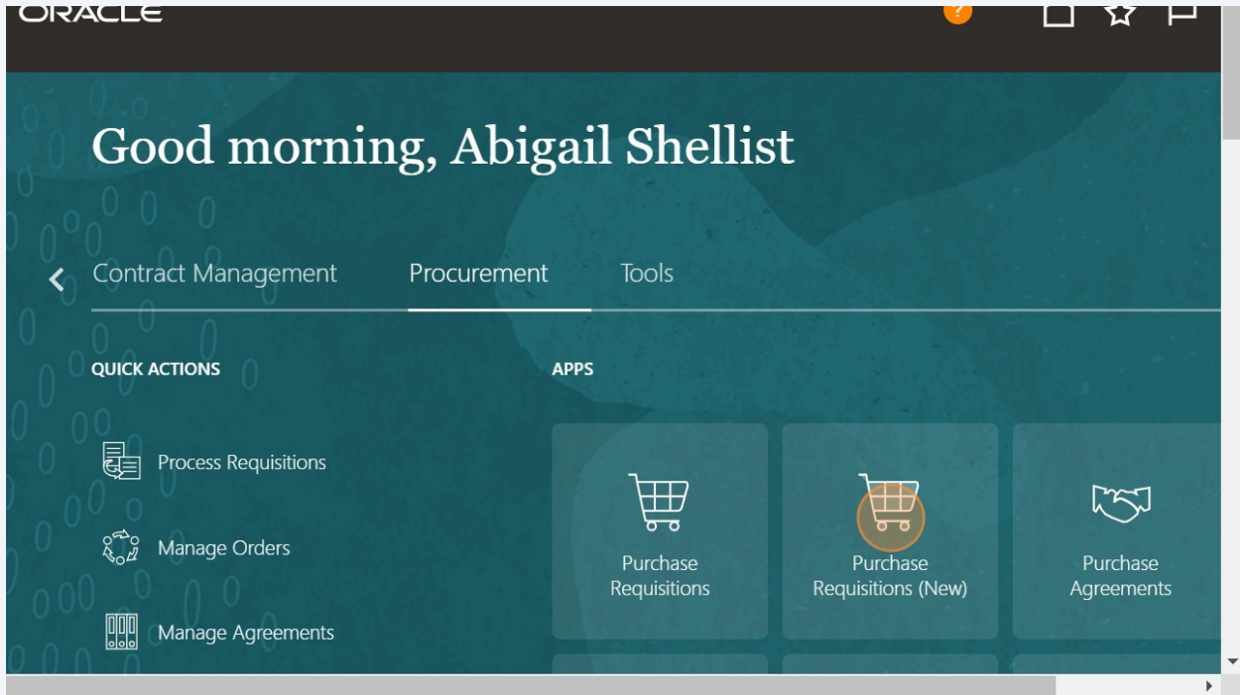


# Creating a Sub Award Requisition

1 Click Purchase Requisitions (New)



## 2 Click "Request Forms"

**RFQ Form** - Please download this form for RFQ requests. Fill out the form with details, scan and attach to the requisition for further evaluation.

Contracts Search - Please use the link to search for contracts <https://procurement.tennessee.edu/purchase-orders/>

### Featured categories

Marketplace Catalogs



Request Forms



UT Local Catalog



## 3 Click Sub Award Form

Search for items or services

3 results

Request a CPA

Create Request

Sub Award Form

Create Request

4 Type in your description of the line item

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## Create Request

Cancel Add to List Add to Cart

### Sub Award Form

Please use this form when creating a requisition for a Payables Sub Award contract.

Item Description  
CFD Research Corporation 216  
Required

Item Type  
Fixed Price Services

Category  
Required

5 Choose your category from the dropdown menu

### Sub Award Form

Please use this form when creating a requisition for a Payables Sub Award contract.

Item Description  
Sub Award CFD Research Corporation

Item Type  
Fixed Price Services

Category  
Required

Amount  
Required

Currency  
USD

6

You can use the dropdown for category or start typing a category. Do **not** use a category that begins with "UTK" or "UTHSC." Those categories are for Facilities Services only.

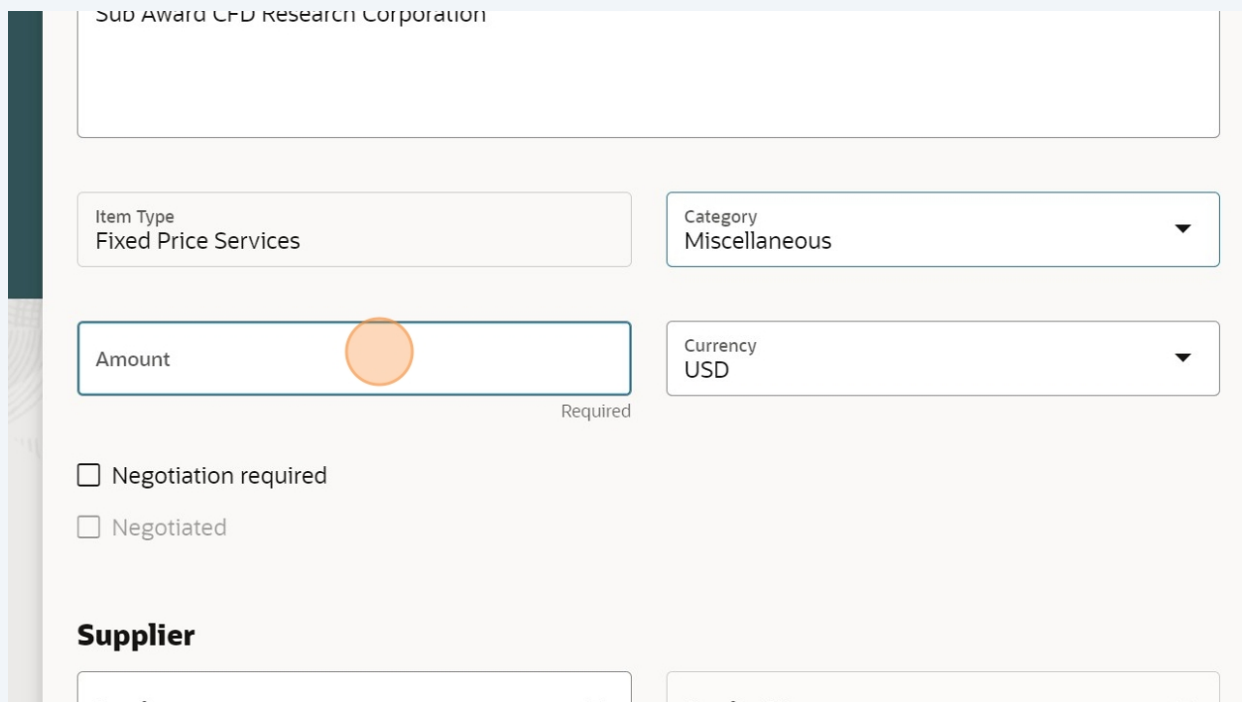
7

Click on the appropriate category

The screenshot shows a procurement form with the following fields and options:

- Item Description:** Sub Award CFD Research Corporation
- Item Type:** Fixed Price Services
- Category:** A dropdown menu is open, showing "Miscellaneous" (highlighted with an orange circle) and "No applicable category". Below it, "UTK HVACR [Air Handling Units]" is visible with a description: "FS UTK The composition of elements mounted in large, accessible box-shaped units called modules, which house the appropriate ventilation requirements for purifying, air-conditioning or renewing the indoor air in a building or premises".
- Amount:** A text input field with a "Required" label below it.
- Checkboxes:**  Negotiation required,  Negotiated
- Supplier:** A section header above two empty text input fields.

8 Click the "Amount" field.



Sub Award CFD Research Corporation

Item Type  
Fixed Price Services

Category  
Miscellaneous

Amount  

Currency  
USD

Required

Negotiation required

Negotiated

**Supplier**

9 Enter the dollar amount for the line item. Do not use a dollar sign , decimal point, or comma. Those will auto populate once you enter your amount.

10 Click on the supplier field

Amount \$100,000.00

Currency USD

Negotiation required

Negotiated

**Supplier**

Supplier

Supplier Site

Supplier Contact

Supplier Item

11 Start typing in the supplier's name. And click on the name from the list.

Item Type Fixed Price Services

Category Miscellaneous

Amount \$100,000.00

Currency USD

Board of Trustees of The Unive  
Other name: UNIVERSITY OF ALABAMA

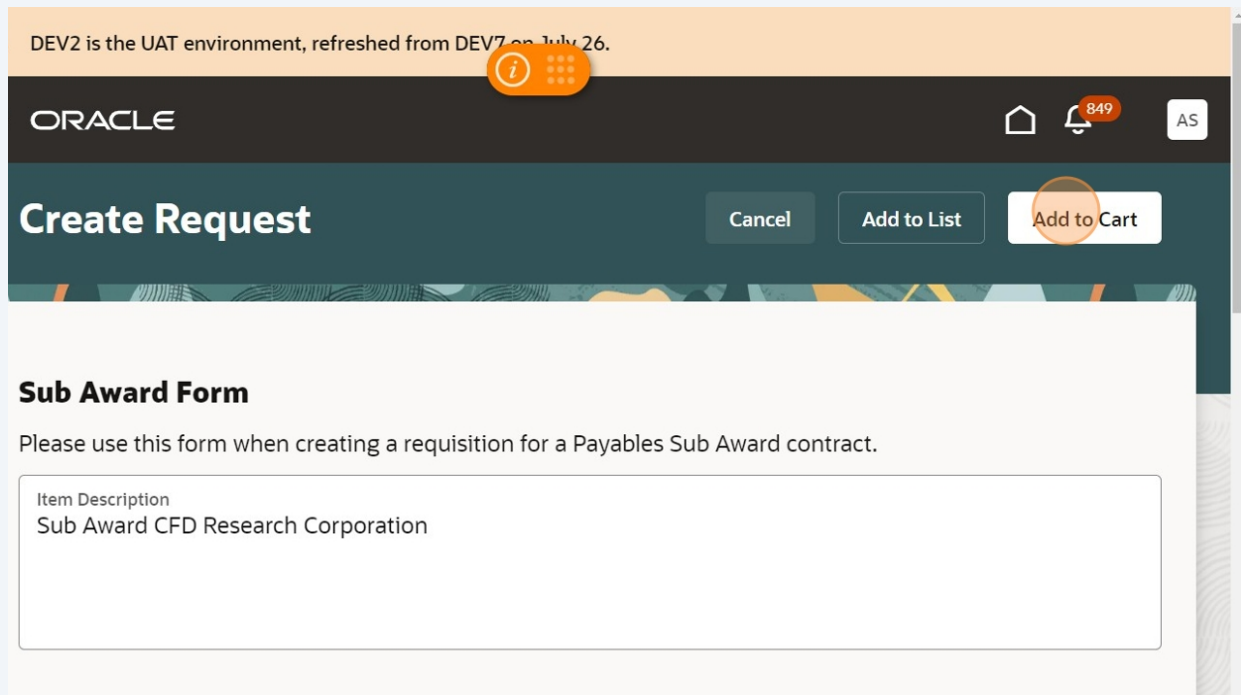
University of Alabama at Birmi

University of Alabama in Huntsville

Supplier University of ala

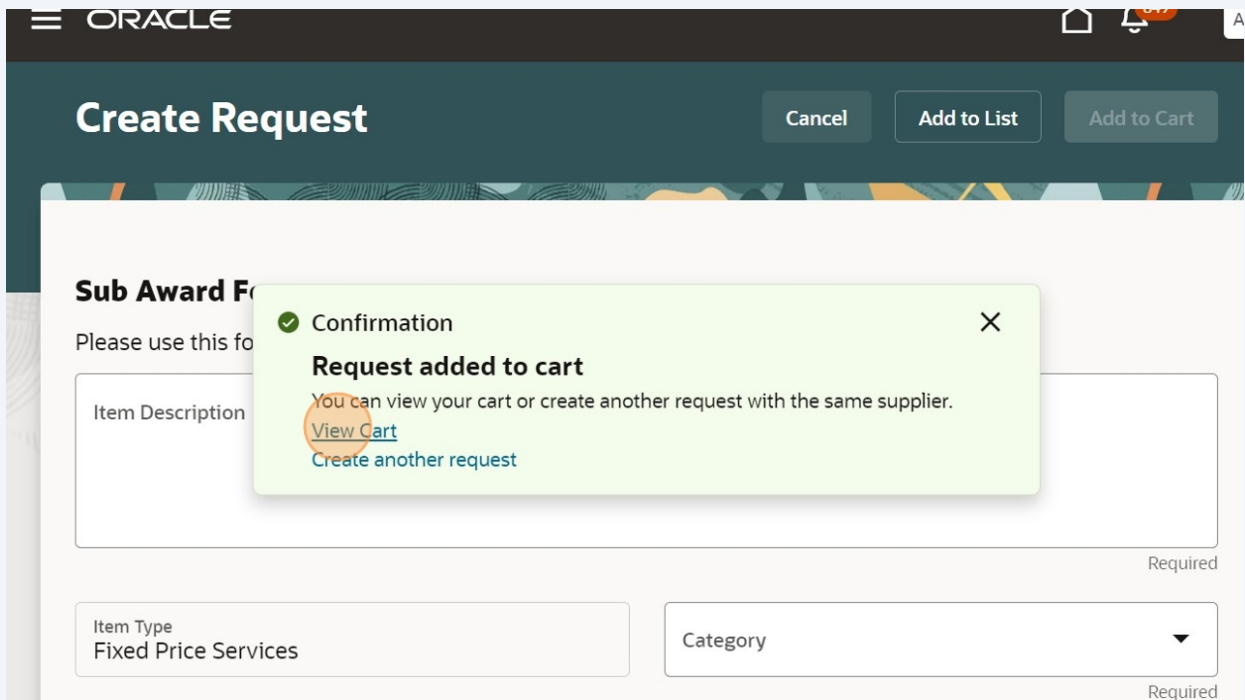
Supplier Site

## 12 Click "Add to Cart"

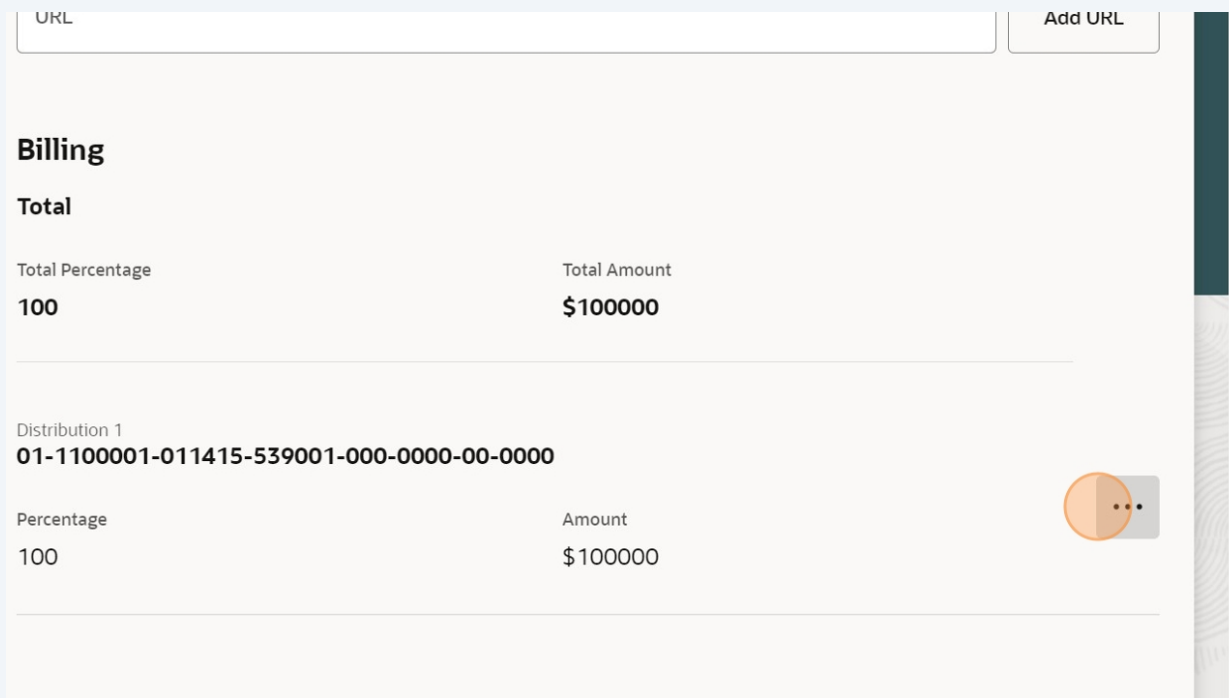


Tip! If you have additional line items to add, click on "create another request." If you have added all line items, click on "view cart."

13 Click "View Cart" if you are finished adding line items.



14 On the left side of the page is the line item. Click on the pencil and scroll down to billing. Click the three dots.





**15** Click "Split"

URL  Add URL

**Billing**

**Total**

| Total Percentage | Total Amount |
|------------------|--------------|
| 100              | \$100000     |

---

Distribution 1

**01-1100001-011415-539001-000-0000-00-0000**

| Percentage | Amount   |
|------------|----------|
| 100        | \$100000 |

Edit  
Split  
⋮

**16** Type in the amount you want to split from the total.

17 Click "Project Number"

The screenshot shows a web form with a sidebar on the left and a main content area on the right. The sidebar contains the following text: "URL", "Billing", "Total", "Total Percentage", "100", "Distribution 1", "01-1100001-011415-5390", "Percentage", "100". The main content area contains: "Amount \$75,000.00", "Percentage 75", "Budget Date 9/20/2024" (with a calendar icon), "Project costing", "Project Number" (with an orange callout circle), "Charge account", "Select favorite charge account" (selected), "Enter charge account number", "Charge Account Nickname supplies" (with a dropdown arrow), "Cancel", and "Create".

18 Enter your project number

19

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

SPN111009 VM Project C/S

Select favorite charge account Enter charge account number

Charge Account Nickname  
supplies

Cancel Create

20 Choose task number

URL

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

Task Number  
1.0 Task 1.0

Expenditure Item Date  
9/20/2024

Expenditure Organization

Contract Number

Required

Cancel Create

## 21 Choose expenditure date

**Billing**

**Total**


Total Percentage  
**100**

Distribution 1  
**01-110001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00


Percentage  
75

Budget Date  
9/20/2024 

**Project costing**

Project Number  
SPN111009 ▼

Task Number  
1.0 ▼

Expenditure Item Date  
9/20/2024 

Expenditure Type  
▼

Expenditure Organization  
▼

Contract Number  
▼

Required

Cancel Create

## 22 Choose Expenditure type by typing in the first few letters of what you are searching for.

23 Click "Subawards over 25K"

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

Task Number  
1.0

Expenditure Item Date  
9/5/2024

Expenditure Type  
subawards

Expenditure Organization

Subawards over 25K Over \$25,000

Subawards up to 25K Up to \$25,000

Cancel Create

24 Enter the expenditure organization

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

Task Number  
1.0

Expenditure Item Date  
9/5/2024

Expenditure Type  
Subawards over 25K

Expenditure Organization  
482010

Contract Number

482010-Biology Geology Environmental Science

Cancel Create

25 Click on contract number

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

Amount  
\$75,000.00

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

Task Number  
1.0

Expenditure Item Date  
9/5/2024

Expenditure Type  
Subawards over 25K

Expenditure Organization  
482010-Biology Geology Env

Contract Number  
2100004 VM Award C/S

26 Click on funding source

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
**100**

**Project costing**

Project Number  
SPN111009

Task Number  
1.0

Expenditure Item Date  
9/5/2024

Expenditure Type  
Subawards over 25K

Expenditure Organization  
482010-Biology Geology Env

Contract Number  
2100004

Funding Source  
CFD Research Corporation 100263  
Internal Internal  
Charge Account Nickname  
supplies

Enter charge account number

27 Click "Create"

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000**

Percentage  
**100**

9/3/2024

Subaward over 25K

Expenditure Organization  
482010-Biology Geology Env

Contract Number  
2100004

Funding Source  
CFD Research Corporation

**Charge account**

Select favorite charge account  Enter charge account number

Charge Account Nickname  
supplies

*i* 01-1100001-011415-539001-000-0000-00-0000

Cancel **Create**

28 You will now see another distribution for the remaining amount. Click on the three dots and click "edit"

**Billing**

**Total**

Total Percentage **100** Total Amount **\$100000**

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000**

Percentage **25** Amount **\$25000**

Distribution 2  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

Percentage **75** Amount

**✔ Distribution 2 created ✕**

29 Click "Edit"

**Billing**

**Total**

|                  |              |
|------------------|--------------|
| Total Percentage | Total Amount |
| 100              | \$100000     |

---

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000**

|            |         |
|------------|---------|
| Percentage | Amount  |
| 25         | \$25000 |

---

Distribution 2  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

|            |        |
|------------|--------|
| Percentage | Amount |
| 75         |        |

Distribution 2 created

**Context Menu:** Edit, Split, Delete

30 You will go through the same steps to add the project information but will change your expenditure type.

**Billing**

**Total**

|                  |           |            |
|------------------|-----------|------------|
| Total Percentage | Amount    | Percentage |
| 100              | 25,000.00 | 25         |

---

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000**

|            |        |
|------------|--------|
| Percentage | Amount |
| 25         |        |

---

Distribution 2  
**01-1100001-011415-539001-000-0000-00-0000**

|            |        |
|------------|--------|
| Percentage | Amount |
|            |        |

**Project costing**

Budget Date: 9/20/2024

Project Number:

**Charge account**

Select favorite charge account  Enter charge account number

Charge Account Nickname: supplies

**Info:** 01-1100001-011415-539001-000-0000-00-0000



31 Choose the correct expenditure type

32

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-5390**

Percentage  
25

Distribution 2  
**01-1100001-011415-5390**

Percentage  
75

Budget Date  
9/20/2024

**Project costing**

Project Number  
SPN111009

Task Number  
1.0

Expenditure Item Date  
9/5/2024

Expenditure Type  
sub

Expenditure Organization  
Required

Funding Source

Participant Support Subsistence

Subawards over 25K Over \$25,000

Subawards up to 25K Up to \$25,000

Subscriptions

**Charge account**

Selected  Search

✔ Distribution 2 created ✕

33 Click "Update"

**Billing**

**Total**

Total Percentage  
**100**

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

Percentage  
**25**

Distribution 2  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

Percentage  
**75**

9/5/2024

Subawards up to 25K

Expenditure Organization  
482010-Biology Geology Env

Contract Number  
2100004

Funding Source  
CFD Research Corporation

**Charge account**

Select favorite charge account  Enter charge account number

Charge Account Nickname  
supplies

*i* 01-1100001-011415-539001-000-0000-00-0000

Distribution 2 created

Cancel

34 Click here.

**Billing**

**Total**

| Total Percentage | Total Amount    |
|------------------|-----------------|
| <b>100</b>       | <b>\$100000</b> |

---

Distribution 1  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

| Percentage | Amount  | ... |
|------------|---------|-----|
| 25         | \$25000 | ... |

---



Distribution 2  
**01-1100001-011415-539001-000-0000-00-0000, SPN111009, 1.0**

| Percentage | Amount | ... |
|------------|--------|-----|
| 75         |        | ... |

Distribution 1 updated

35 Click "Update"

DEV2 is the UAT environment, refreshed from DEV7 on July 26.

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## Line Delivery and Billing Details

**Description**

Line Description  
Sub Award CFD Research Corporation


Amount  
\$100,000.00

36 Click the pencil icon by Requisition Summary

ORACLE   AS

## Cart




Requisition REQ010000000128

**Requisition summary** 

|                        |                     |
|------------------------|---------------------|
| Subtotal               | \$100,000.00        |
| Estimated Tax          | \$0.00              |
| <b>Approval Amount</b> | <b>\$100,000.00</b> |

Description


Requester


**37** Scroll down the page to "requisition type"

Project Number ▼


**Charge account**

Charge To  
-----0000 

**Budgetary control**

Budget Date  
9/20/2024 

**Additional information**

Requisition Type   
Required

Bill-to Location ▼

**38** Click Sub Award

Cooperative Agreement Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405


Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

Sole Source- No NCJ Required Per FI0405, NCJ form is not required

Standard Purchase- No NCJ required Standard Purchase - No NCJ required

State of TN Contract Provide the state contract number

Sub Award Use for payable sub award contracts 

Requisition Type ▼  
Required

Bill-to Location ▼

**39** Attach the subaward contract to the attachments section.

**40** Step

**Additional information**

|                               |                  |
|-------------------------------|------------------|
| Requisition Type<br>Sub Award | Bill-to Location |
|-------------------------------|------------------|

**Notes**

Note to Supplier

**Attachments**

Category  
Internal to Requisition

**Drag and Drop**  
Select or drop files here.

|     |         |
|-----|---------|
| URL | Add URL |
|-----|---------|

41 Click "Update"

**REQ01000000128**  
Requisition

Justification

**Delivery**

Requester  
Abigail Shellist

Requested Delivery Date  
9/27/2024

Deliver to Location  
UT Tower\_10\_1044

Cancel Update

42 Click Submit

DEV2 is the UAT environment, refreshed from DEV7 on July 26.

ORACLE

Actions Submit

**Cart**  
Requisition REQ01000000128

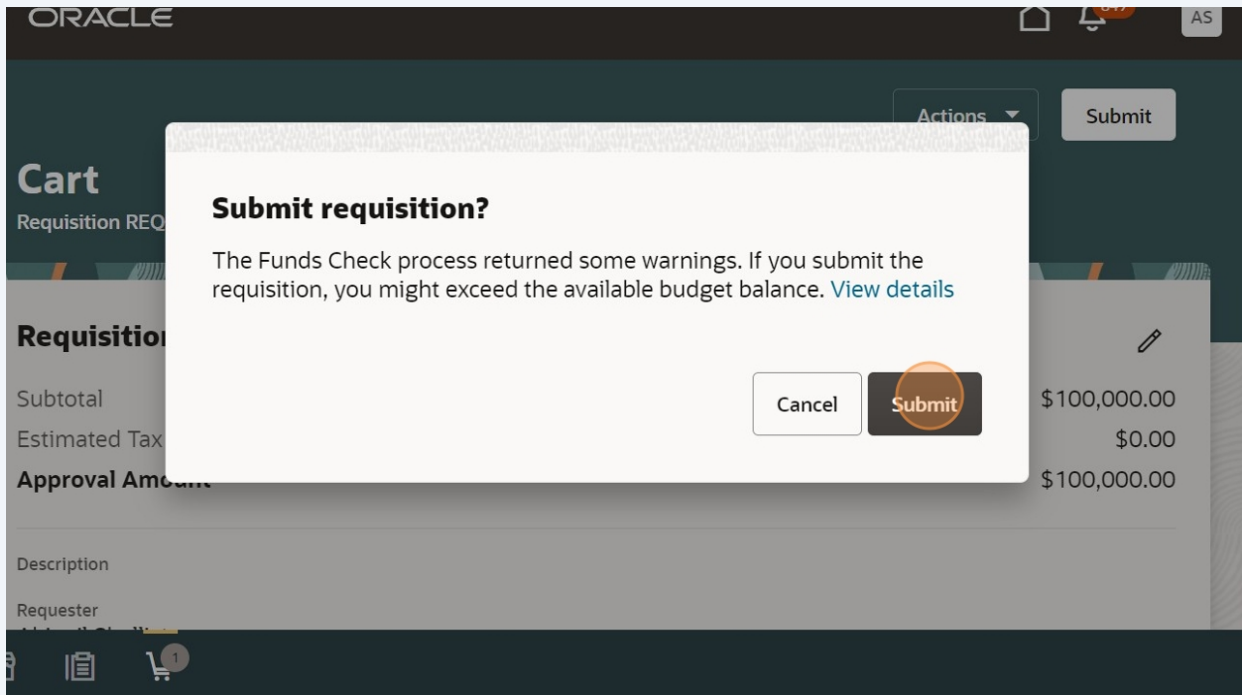
**Requisition summary**

|                        |                     |
|------------------------|---------------------|
| Subtotal               | \$100,000.00        |
| Estimated Tax          | \$0.00              |
| <b>Approval Amount</b> | <b>\$100,000.00</b> |

Description

43

If you get a funds check warning, you can bypass it and continue to submit your requisition.



44

In your "My recent requisitions" you should see your requisition. It is now going through approvals and the PO will be issued by your procurement office.

