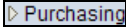


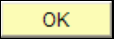
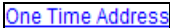
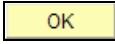
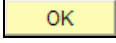

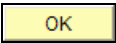

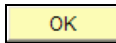





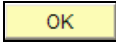





Creating a Requisition

1.	From the Financials menu, click the Purchasing link. 
2.	Click the Requisitions link.
3.	Click the Add/Update Requisitions link.
4.	On the Requisitions page, make certain the <i>Add a New Value</i> tab is selected. Click the Add button. 
5.	Click the Requisition Defaults link to specify the defaults applicable to the requisition.
6.	On the Requisition Defaults page, the first step is to look up and select the appropriate Purchase Order (PO) Type. Click the PO Type drop-down arrow and select the appropriate PO Type.
7.	On the remainder of the Requisition Defaults page, enter defaults that you wish to apply to the entire requisition. You can override defaults at the <i>line</i> , <i>schedule</i> , and <i>distribution</i> levels. In the <i>Line</i> section of the page, enter your EmplID into the Buyer field.
8.	Enter the Vendor ID in the Vendor field.
9.	Enter MISC in the Category field.
10.	Use the Unit of Measure field to enter a default unit of measure for the Requisition.
11.	Enter the location code for your campus in the Vendor Location field.
12.	In the <i>Schedule</i> section of the page, use the Ship To field to enter/change the University location to which the vendor will ship the order. Normally, your usual location will default for you. Use the Distribute by drop-down list to select how you want to distribute the cost. Your choices are either Amount or Quantity .
13.	Click the Distribute by drop-down arrow.
14.	Click on Quantity to select it.
15.	Select the More PO Defaults link to enter defaults for the Requisition Header. 
16.	The Requisition Header Defaults page contains the <i>Billing Location</i> , <i>Payment Terms</i> , <i>Dispatch Method</i> , <i>Freight Terms Code</i> , <i>Ship Via Code</i> , and the <i>Dispatch</i> and <i>Amount Only</i> checkboxes. These fields will default for you but may be changed as needed. (The <i>Receiving Required</i> checkbox cannot be changed.) Use the Look Up Icons or Drop Down Menus to search and select from the available choices.
17.	When finished, click the OK button. 
18.	On the Requisition Defaults page, click the One Time Address link. 

19.	<p>Use the Req One Time Address Default page to enter a Ship-To address that is not a University address for special shipments.</p> <p>Click the OK button when finished entering the address. </p>
20.	<p>If you use SpeedCharts, use the SpeedChart field to enter a default SpeedChart.</p>
21.	<p>In the Distributions section of the page, in the distribution line, use the Percentage field to specify the percentage of the order quantity that is to be distributed on the distribution line(s).</p>
22.	<p>The remaining fields are <i>Chartfields</i>. Enter the appropriate Chartfield combination for this requisition. At a minimum, Account, Fund and Dept are required. Program, Project, Class and Oper Unit may also be used.</p>
23.	<p>When finished entering your requisition defaults, click the OK button. </p>
24.	<p>Once you set your requisition defaults, changes are rarely made to them. If you must apply changes to your default settings to alter a ChartField value on a distribution line, or a Vendor, for instance, then you will be presented with the Retrofit page after saving the changes.</p> <p>When ready, click the OK button.</p>
25.	<p>On the Requisitions page, enter a description of the item/s you are ordering in the Description field. In the following steps, 26-29, if you entered these on the Requisition Defaults page you do not need to enter them here.</p>
26.	<p>In the Quantity field, enter the quantity of the item/s you are ordering.</p>
27.	<p>Enter the appropriate Unit of Measure in the UOM field.</p>
28.	<p>Enter the default category into the Category field.</p>
29.	<p>In the Price field, enter the price for the item/s.</p>
30.	<p>If desired, click the Line Comments icon to access the Line Comments page. </p>
31.	<p>Use the Line Comments page to maintain line comments.</p> <p>Click the OK button when finished. </p>
32.	<p>Click the Line Details icon to open the Details for Line 1 page. </p>
33.	<p>Use the Details for Line page to view and/or update details about the Line. This page has the Do Not Print Line check box and the Amount Only check box (the <i>Amount Only</i> box is also on the <i>Attributes</i> tab).</p> <p>Click the OK button. </p>
34.	<p>On the Requisitions page, click the Line Schedule icon to change the <i>Ship To</i> address and to access the Distribution page.   If you entered the Ship to and Distribution on the Requisition Defaults page you do not need to enter it here.</p>
35.	<p>On the Schedule page, click the + button to add more <i>Ship To</i> lines. Click the Look Up icon adjacent to the Ship To field to search for and select the Ship To location(s) needed. </p>

36.	Click the OK button. 
37.	Click the Distribution button. 
38.	<p>If you did not enter the Distribution on the Requisitions Defaults page you can do it here. If you entered the Distribution on the Requisitions Defaults page, you can still make changes here.</p> <p>Click OK to go back to the schedule page. </p>
39.	Click the Return to Main Page link. Return to Main Page
40.	On the Requisition page, click the Add a Row icon (+). 
41.	<p>When the prompt appears, enter the number of lines you wish to add to the Requisition. "1" appears by default.</p> <p>Click the OK button. </p>
42.	Click the Save button. 
43.	After saving the requisition, notice that a Requisition ID has been generated.
44.	End of Procedure.