



# ADDY NOTES



## Confirming the Correct Business Unit

This Addy Note explains how to confirm which **Business Unit** should be used when creating a requisition.

It is very important that the correct **Business Unit** be selected at the start of creating the requisition. If you attempt to create a requisition for departments or projects that are associated with a business unit other than the one you select at the start of the requisition, this will result in the requisition failing to save and you will need to begin again.

If you have items you are purchasing, some for a **RFD01** project and some for a **UCF01** project, UCF Financials will NOT allow you to save them on the same requisition. You will need to create two individual requisitions, one for each business unit.

Step	Action
1.	<p>Navigate to: <b>Main Menu &gt; Set Up Financials/Supply Chain &gt; Common Definitions &gt; Define ChartFields &gt; Define Values &gt; ChartField Values</b></p> 



# ADDY NOTES



Step	Action
2.	<p>Click the <b>Project</b> link.</p> <div data-bbox="305 573 1118 1268" style="border: 1px solid black; padding: 10px;"><p><b>ChartField Values</b></p><p>ChartField Values</p><p>You do not have security privileges to access the ChartFields that are not hyperlinks.</p><ul style="list-style-type: none"><li>Account</li><li>Department</li><li><b>Project</b></li><li>Fund Code</li><li>Program Code</li><li>Budget Reference</li><li>Alternate Account</li><li>Operating Unit</li><li>Book Code</li><li>Adjustment Type</li><li>Scenario</li><li>Statistics Code</li></ul></div>



# ADDY NOTES



Step	Action
3.	<p>Enter the project number you wish to look up in the <b>Project</b> data entry field.</p> <div data-bbox="306 573 1105 1117" style="border: 1px solid black; padding: 10px;"> <p><b>Project ID</b> Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p><a href="#">Find an Existing Value</a></p> <p>▼ <b>Search Criteria</b></p> <p>SetID = UCF01</p> <p>Project begins with ▼ 13278008</p> <p>Description begins with</p> <p><input type="checkbox"/> Case Sensitive</p> <p><a href="#">Search</a> <a href="#">Clear</a> <a href="#">Basic Search</a> <a href="#">Save Search Criteria</a></p> </div>
4.	<p>Click <b>Search</b>.</p> <div data-bbox="306 1236 1105 1780" style="border: 1px solid black; padding: 10px;"> <p><b>Project ID</b> Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p><a href="#">Find an Existing Value</a></p> <p>▼ <b>Search Criteria</b></p> <p>SetID = UCF01</p> <p>Project begins with ▼ 13278008</p> <p>Description begins with</p> <p><input type="checkbox"/> Case Sensitive</p> <p><a href="#">Search</a> <a href="#">Clear</a> <a href="#">Basic Search</a> <a href="#">Save Search Criteria</a></p> </div>



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Step	Action
5.	<p>The <b>Integration</b> field displays the correct <b>Business Unit</b> for this project.</p> <p>For this example, the correct <b>Business Unit</b> is <b>RFD01</b>. This indicates that the project is associated with the UCF Research Foundation. Notice too, that the <b>Description</b> for this project contains the letters RF (circled below). This is an additional indicator that you would need to use <b>RFD01</b> as the correct <b>Business Unit</b> for any requisition which uses this project number.</p> <div data-bbox="305 793 1295 1218" style="border: 1px solid black; padding: 10px;"> <p>Project</p> <p><b>Project</b></p> <p>SetID UCF01</p> <p>Project 13278008</p> <p>Description SPT BS MGT-RF APCHICK-DEVOS</p> <p>Start Date 05/13/2008</p> <p>End Date 04/15/2017</p> <p>Status Active</p> <p>Integration RFD01</p> <p>Attributes</p> <p><input type="checkbox"/> Summary Project</p> <p>Save Return to Search Notify</p> </div>