



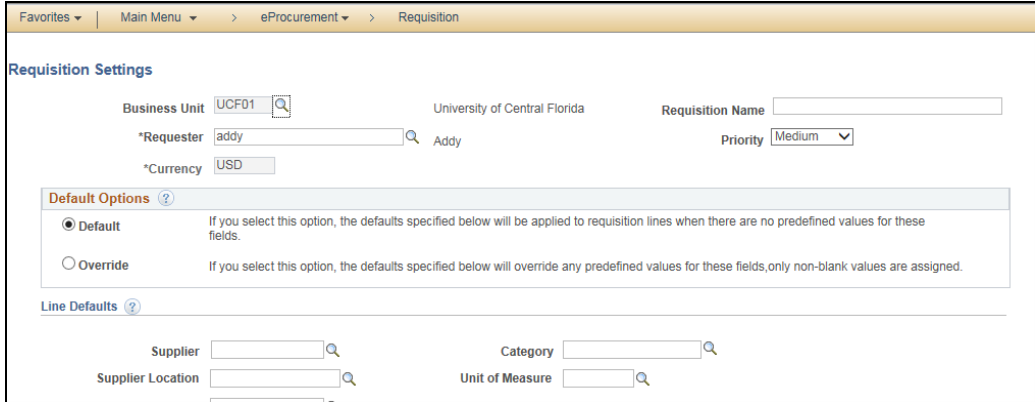
# ADDY NOTES



## Creating a Requisition to Acquire an Asset

This Addy Note explains the additional steps you'll need to take whenever you create a requisition to purchase an asset. Assets are computers, equipment, furniture, fixtures, and other tangible, non-consumable/non-expendable items with a value of \$5,000 or more and a life expectancy of one year or more.

If you need to review any of the steps for creating a requisition, refer to the Addy Note, [Creating a Requisition](#).

Step	Action
1.	<p>Navigate to: <b>Main Menu &gt; eProcurement &gt; Requisition.</b></p> 



# ADDY NOTES



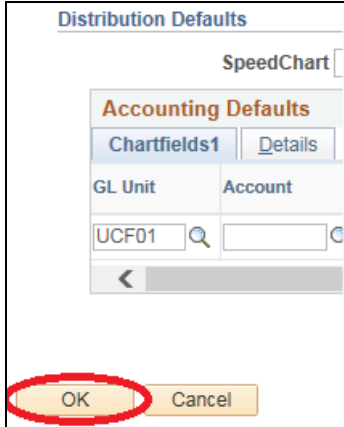
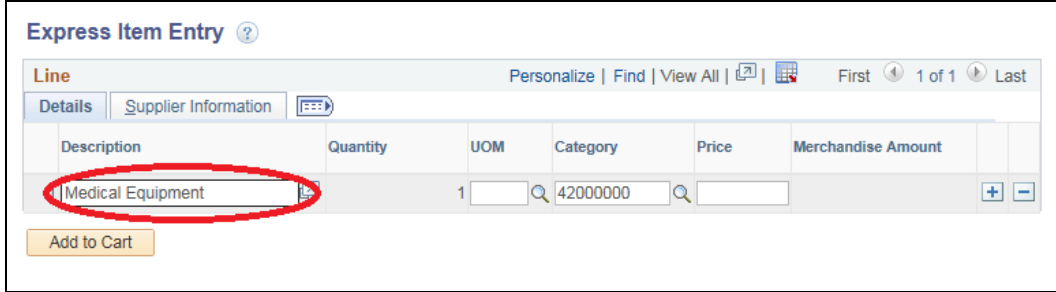
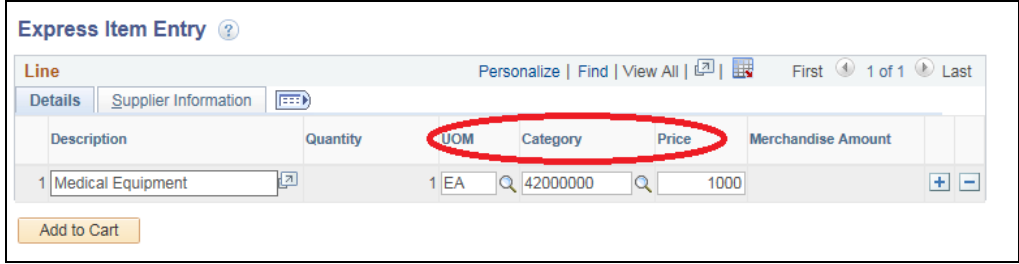
Step	Action																						
2.	<p>Complete the information on the <b>Requisition Settings</b> page, including <b>Category</b>, <b>Supplier</b>, and <b>SpeedChart</b> as needed.</p> <div data-bbox="321 611 1284 1251" style="border: 1px solid black; padding: 10px;"> <p><b>Requisition Settings</b></p> <p>Business Unit: UCF01 University of Central Florida Requisition Name: _____</p> <p>*Requester: addy Addy Priority: Medium</p> <p>*Currency: USD</p> <p><b>Default Options</b></p> <p><input type="radio"/> Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.</p> <p><input checked="" type="radio"/> <b>Override</b> If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.</p> <p><b>Line Defaults</b></p> <p>Supplier: 0000080413 Category: 42000000</p> <p>Supplier Location: 001 Unit of Measure: _____</p> <p>Buyer: _____</p> <p><b>Shipping Defaults</b></p> <p>Ship To: FIN Add One Time Address</p> <p>Due Date: _____ Attention: _____</p> <p><b>Distribution Defaults</b></p> <p>SpeedChart: _____</p> <p><b>Accounting Defaults</b></p> <table border="1"> <thead> <tr> <th>GL Unit</th> <th>Account</th> <th>Dept</th> <th>PC Bus Unit</th> <th>Project</th> <th>Activity</th> <th>Fund</th> <th>Program</th> <th>Bud Ref</th> <th>Dist</th> <th>Perce</th> </tr> </thead> <tbody> <tr> <td>UCF01</td> <td></td> <td>02500001</td> <td></td> <td></td> <td></td> <td>10001</td> <td>ZZ</td> <td></td> <td></td> <td>1</td> </tr> </tbody> </table> </div>	GL Unit	Account	Dept	PC Bus Unit	Project	Activity	Fund	Program	Bud Ref	Dist	Perce	UCF01		02500001				10001	ZZ			1
GL Unit	Account	Dept	PC Bus Unit	Project	Activity	Fund	Program	Bud Ref	Dist	Perce													
UCF01		02500001				10001	ZZ			1													

(Note: Users must select the **Override** radio button in the **Default Options** section. If the **Override** radio button is not selected for this account, the asset information will not populate on the **Asset** tab. Make sure to choose an Asset Category code from [this list](#).)



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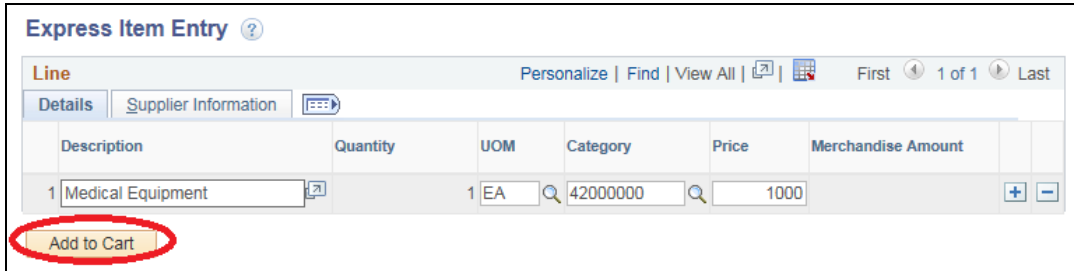
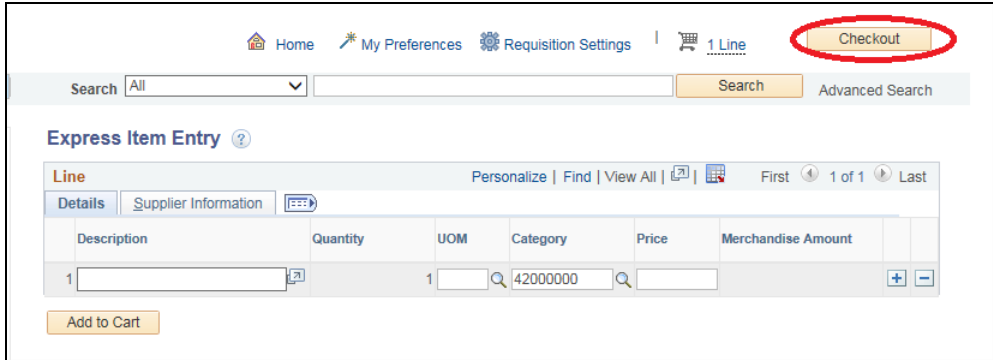
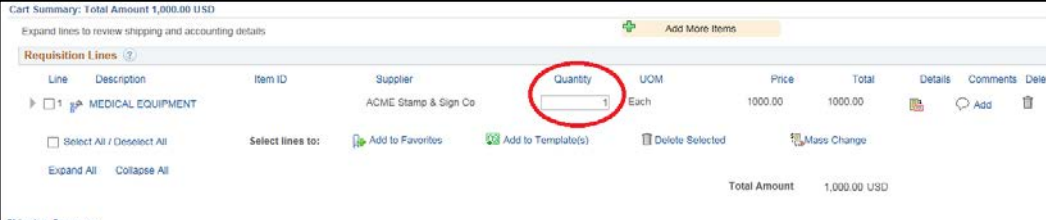


Step	Action
3.	<p>Click <b>OK</b>.</p> 
4.	<p>Enter the asset's description in the <b>Description</b> field.</p> 
5.	<p>Complete the <b>UOM</b>, <b>Category</b>, and <b>Price</b> field.</p>  <p>Choosing an asset category on the <b>Requisition Settings</b> pages makes the lines distributed by <b>Quantity</b> (rather than standard Amount only) with inspection checked on the <b>Line Details</b> tab.</p>



# ADDY NOTES

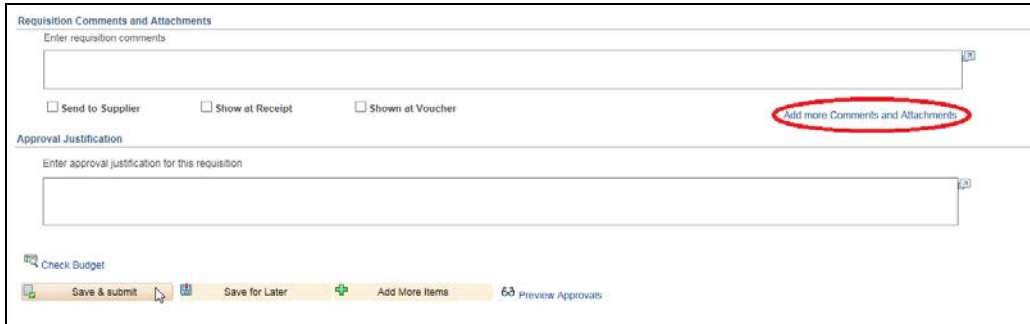
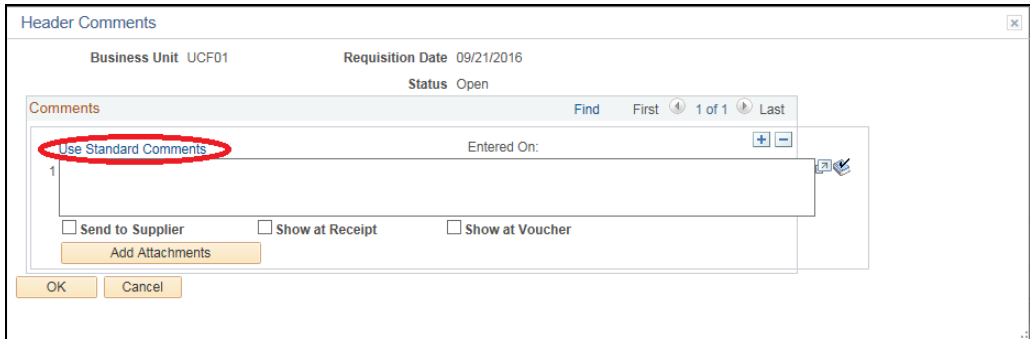


Step	Action
6.	<p>Click <b>Add to Cart</b>.</p> 
7.	<p>After clicking <b>Add to Cart</b>, your lines will move to the shopping cart. After you are done, click <b>Checkout</b>.</p> 
8.	<p>By entering the <b>Asset Category</b> on the <b>Requisition Settings</b> page, you are able to modify the <b>Quantity</b> immediately from the <b>Checkout</b> page.</p> 



# ADDY NOTES

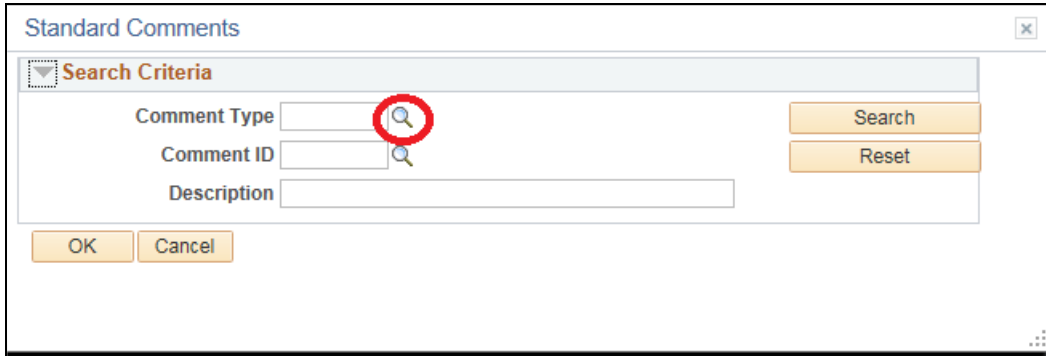
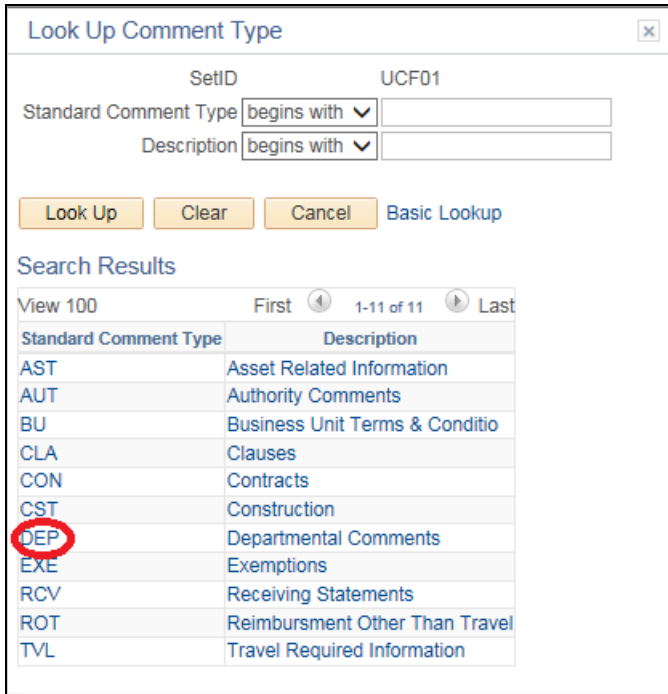


Step	Action
<p>9.</p>	<p>You have to add two comments to this requisition since it is an asset:</p> <ol style="list-style-type: none"> <li>A standard, requisition comment (header comment)</li> <li>An asset comment (typically a line comment, but since this is the only item in this example, create a requisition comment)</li> </ol> <p>Scroll down to the bottom of the page and under <b>Requisition Comments and Attachments</b>, click <b>Add more Comments and Attachments</b>.</p> 
<p>10.</p>	<p>Click the <b>Use Standard Comments</b> link.</p> 



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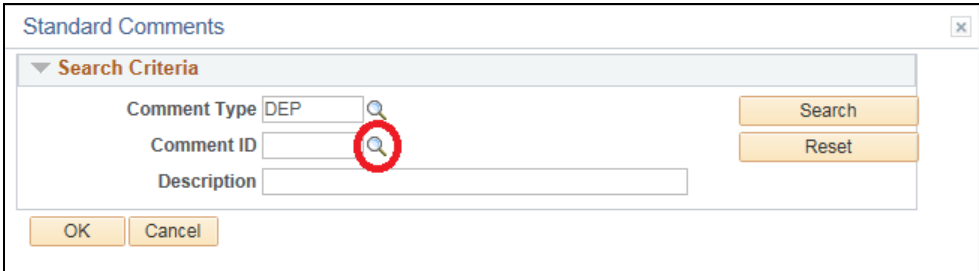
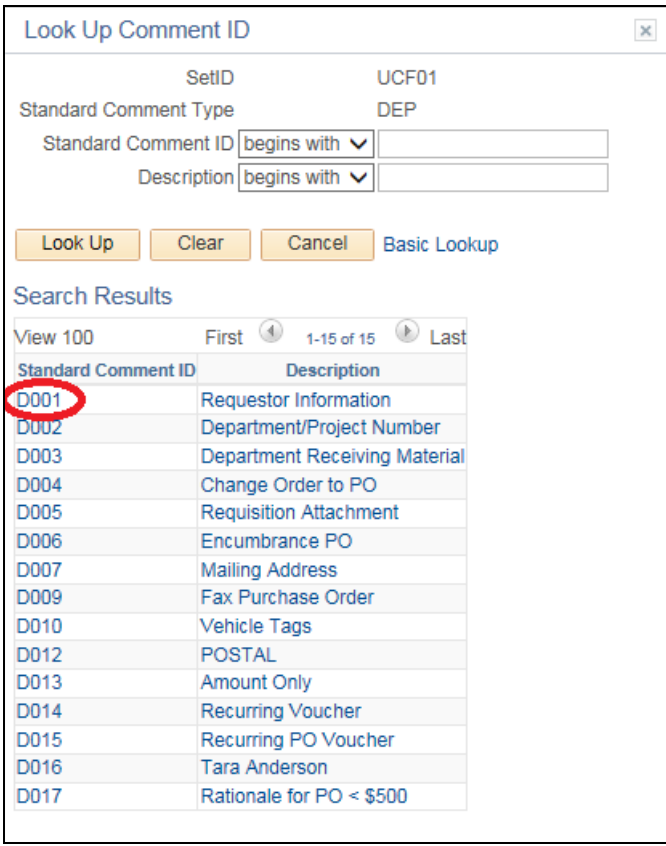


Step	Action
11.	<p>Click the <b>Comment Type</b> field lookup icon.</p> 
12.	<p>Select <b>DEP-Departmental Comments</b>.</p> 



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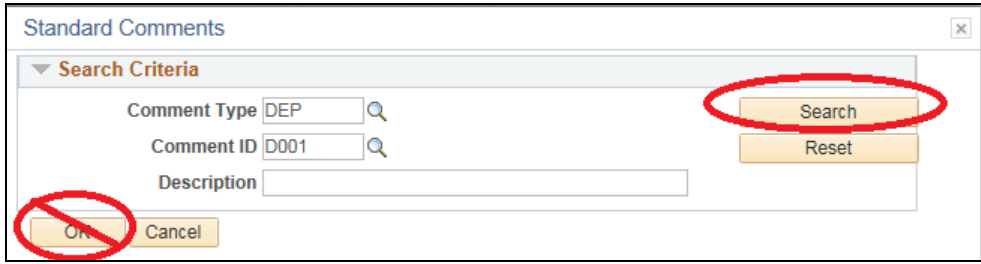
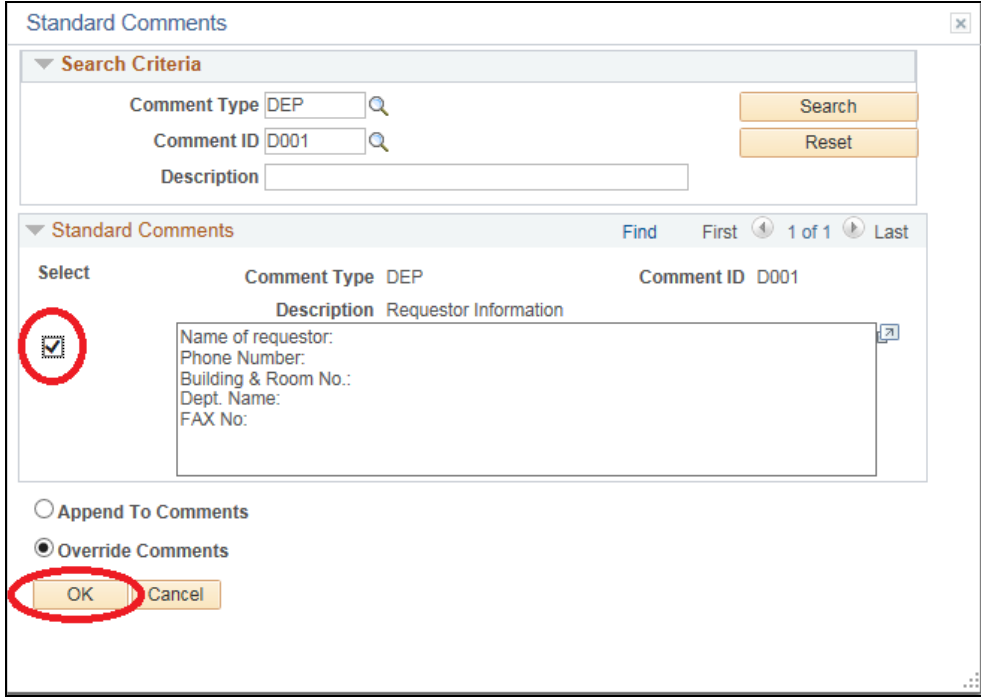


Step	Action
13.	<p>Click the <b>Comment ID</b> field lookup icon.</p> 
14.	<p>Select <b>D001-Requestor Information</b>.</p> 



# ADDY NOTES



Step	Action
15.	<p>Click <b>Search</b>. Do not click <b>OK</b>.</p> 
16.	<p>Select the <b>comment</b>, then click <b>OK</b>.</p> 





# ADDY NOTES

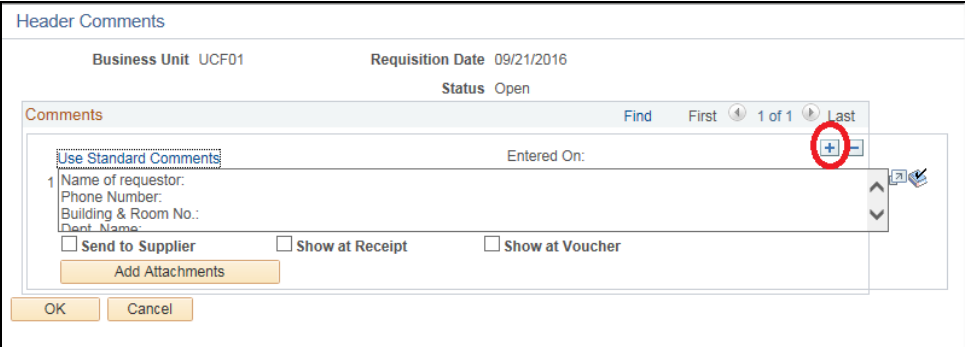
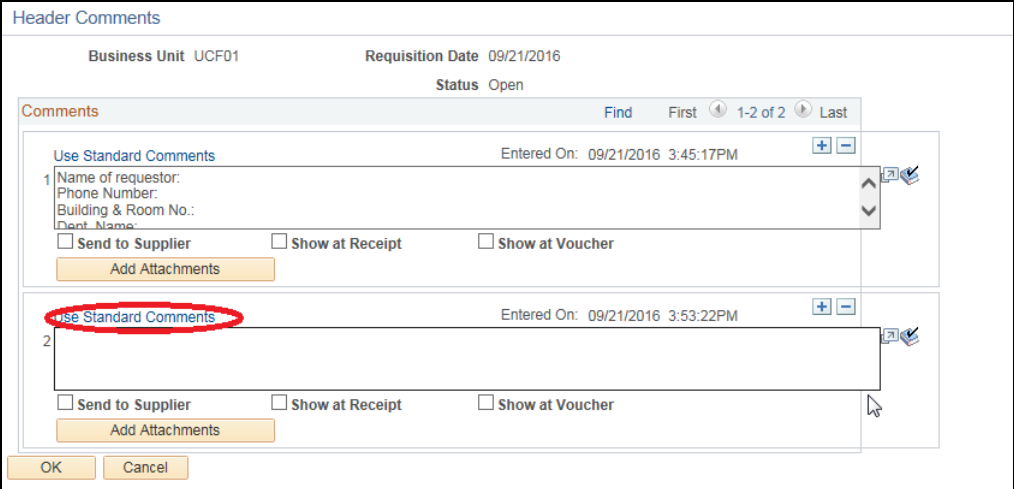


Step	Action
<p><b>17.</b></p>	<p>Click on the <b>Display Comment Modal Window</b> icon.</p> <div data-bbox="321 573 1307 898" style="border: 1px solid black; padding: 5px;"> <p>Header Comments</p> <p>Business Unit UCF01      Requisition Date 09/21/2016</p> <p>Status Open</p> <p>Comments <span style="float: right;">Find    First 1 of 1 Last</span></p> <p><input type="checkbox"/> Use Standard Comments      Entered On: <span style="float: right;">+ -</span></p> <p>1 Name of requestor:                      Phone Number:                      Building &amp; Room No.:                      Dept. Name:</p> <p><input type="checkbox"/> Send to Supplier      <input type="checkbox"/> Show at Receipt      <input type="checkbox"/> Show at Voucher</p> <p style="text-align: center;">Add Attachments</p> <p style="text-align: right;">OK    Cancel</p> </div> <p><b>Note:</b> Select the appropriate check boxes to show the comment on the purchase order, receipt and/or voucher.</p>
<p><b>18.</b></p>	<p>Provide all the information requested in the comment. Add your initials and the date.</p> <div data-bbox="321 1085 803 1348" style="border: 1px solid black; padding: 5px;"> <p>Header Comments</p> <p>Name of requestor:                      Phone Number:                      Building &amp; Room No.:                      Dept. Name:                      FAX No:</p> </div>
<p><b>19.</b></p>	<p>Click <b>Return</b>.</p> <div data-bbox="321 1436 935 1604" style="border: 1px solid black; padding: 5px;"> <p> Return</p> </div>



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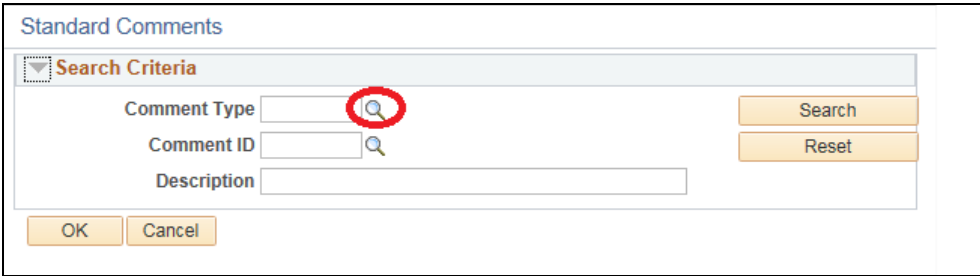
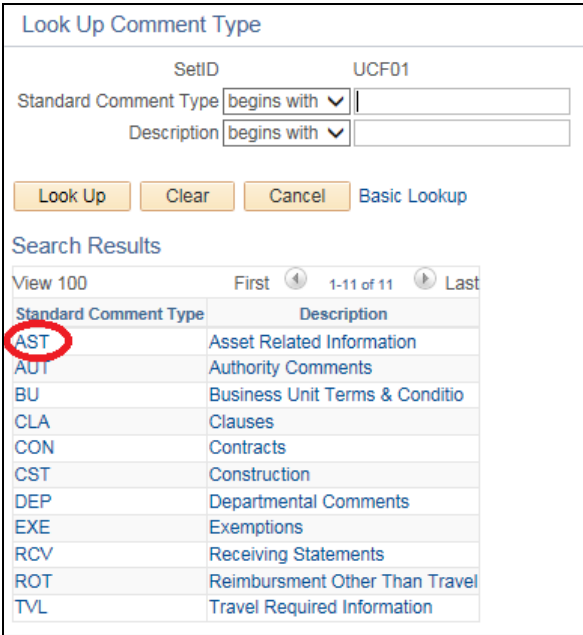


Step	Action
20.	<p>Click the <b>Add Comment (+)</b> icon.</p> 
21.	<p>Click the <b>Use Standard Comment</b> link.</p> 



# ADDY NOTES



Step	Action
22.	<p>Select the <b>Comment Type</b> lookup icon.</p> 
23.	<p>Select <b>AST-Asset Related Information</b>.</p> 



# ADDY NOTES



Step	Action				
24.	Select the <b>Comment ID</b> lookup icon. <div data-bbox="321 573 1247 829" style="border: 1px solid black; padding: 5px;"> <p>Standard Comments</p> <p>▼ Search Criteria</p> <p>Comment Type <input type="text"/> </p> <p>Comment ID <input type="text"/> </p> <p>Description <input type="text"/></p> <p>OK Cancel Search Reset</p> </div>				
25.	Select <b>A001</b> . <div data-bbox="321 915 891 1325" style="border: 1px solid black; padding: 5px;"> <p>Look Up Comment ID</p> <p>SetID UCF01</p> <p>Standard Comment Type AST</p> <p>Standard Comment ID <input type="text" value="begins with"/></p> <p>Description <input type="text" value="begins with"/></p> <p>Look Up Clear Cancel Basic Lookup</p> <p>Search Results</p> <p>View 100 First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Standard Comment ID</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>A001</td> <td>Asset Comment</td> </tr> </tbody> </table> </div>	Standard Comment ID	Description	A001	Asset Comment
Standard Comment ID	Description				
A001	Asset Comment				
26.	Click <b>Search</b> . Do not click <b>OK</b> . <div data-bbox="321 1451 1261 1740" style="border: 1px solid black; padding: 5px;"> <p>Standard Comments</p> <p>▼ Search Criteria</p> <p>Comment Type <input type="text" value="AST"/> </p> <p>Comment ID <input type="text" value="A001"/> </p> <p>Description <input type="text"/></p> <p><del>OK</del> Cancel Search Reset</p> </div>				



# ADDY NOTES



Step	Action									
27.	<p>Select the comment then click <b>OK</b>.</p> <div data-bbox="321 573 1206 1176" style="border: 1px solid black; padding: 5px;"> <p>Standard Comments</p> <p>▼ Search Criteria</p> <p>Comment Type <input type="text" value="AST"/> <input type="button" value="Search"/></p> <p>Comment ID <input type="text" value="A001"/> <input type="button" value="Reset"/></p> <p>Description <input type="text"/></p> <hr/> <p>▼ Standard Comments <span style="float: right;">Find First 1 of 1 Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Select</th> <th style="width: 40%;">Comment Type</th> <th style="width: 50%;">AST</th> </tr> <tr> <th></th> <th style="width: 40%;">Description</th> <th style="width: 50%;">Asset Comment</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>Requestor Name: Name &amp; Phone No. of Contact Person: Purchased by Department/Project Number: Asset receiving location:</td> <td>Please indicate one of the following asset types: Artwork, Computer Equipment/Servers, Computer Software, Data Comm Devices,</td> </tr> </tbody> </table> <p><input type="radio"/> Append To Comments  <input checked="" type="radio"/> Override Comments</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>	Select	Comment Type	AST		Description	Asset Comment	<input type="checkbox"/>	Requestor Name: Name & Phone No. of Contact Person: Purchased by Department/Project Number: Asset receiving location:	Please indicate one of the following asset types: Artwork, Computer Equipment/Servers, Computer Software, Data Comm Devices,
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	Description	Asset Comment								
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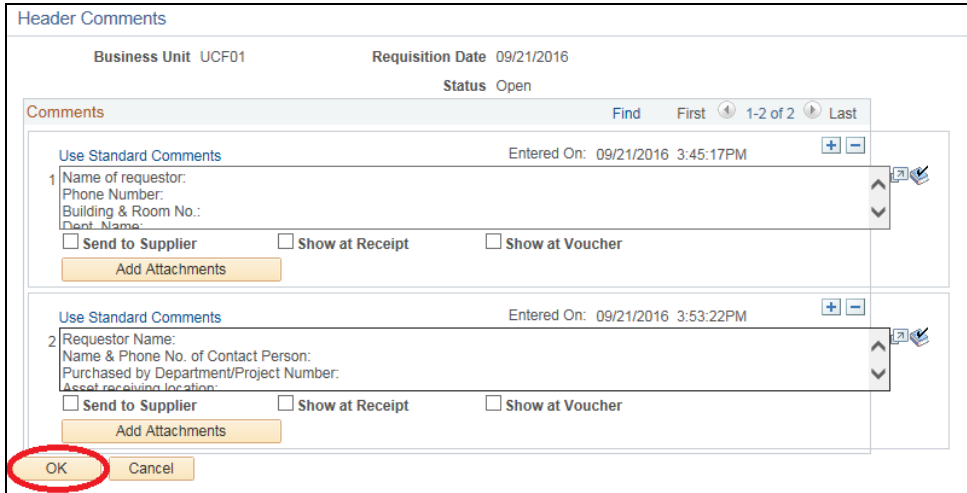
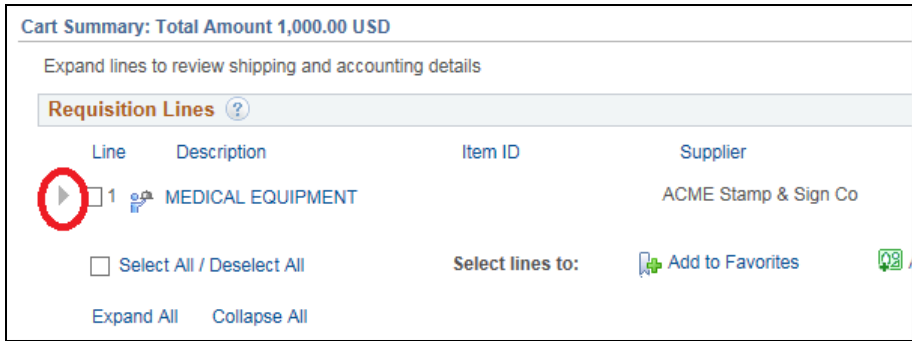
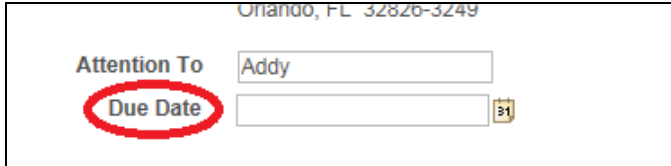


Step	Action
<p>28.</p>	<p>Click the <b>Display Comment Modal Window</b> icon for the second comment to edit.</p> <div data-bbox="321 573 1310 1060" style="border: 1px solid black; padding: 5px;"> <p>Header Comments</p> <p>Business Unit UCF01      Requisition Date 09/21/2016 Status Open</p> <p>Comments <span style="float: right;">Find    First    1-2 of 2    Last</span></p> <div style="border: 1px solid gray; padding: 2px;"> <p>Use Standard Comments      Entered On: 09/21/2016 3:45:17PM      + -</p> <p>1 Name of requestor: Phone Number: Building &amp; Room No.: Dept. Name: <input type="checkbox"/> Send to Supplier      <input type="checkbox"/> Show at Receipt      <input type="checkbox"/> Show at Voucher Add Attachments</p> </div> <div style="border: 1px solid gray; padding: 2px;"> <p>Use Standard Comments      Entered On: 09/21/2016 3:53:22PM      + -</p> <p>2 Requestor Name: Name &amp; Phone No. of Contact Person: Purchased by Department/Project Number: Asset receiving location: <input type="checkbox"/> Send to Supplier      <input type="checkbox"/> Show at Receipt      <input type="checkbox"/> Show at Voucher Add Attachments</p> </div> <p>OK      Cancel</p> </div> <p>Note: Select the appropriate check boxes to show the comment on the purchase order, receipt, and/or voucher.</p>
<p>29.</p>	<p>Complete the requested information. Don't forget to add your initials and the date at the bottom before you click <b>Return</b>.</p> <div data-bbox="321 1283 784 1507" style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: center;"><b>Return</b></p> </div>



# ADDY NOTES



Step	Action
30.	<p>Click <b>OK</b>.</p> 
31.	<p>Click the <b>Asset's Expand Section</b> icon.</p> 
32.	<p>Complete the <b>Due Date</b>.</p> 



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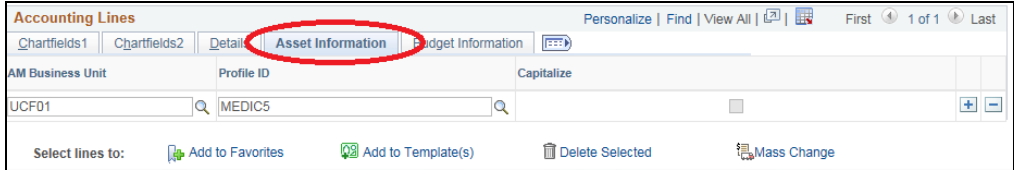
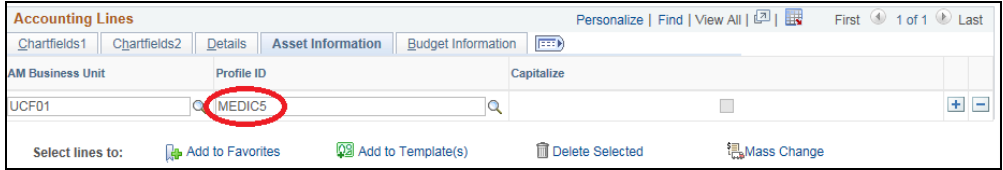
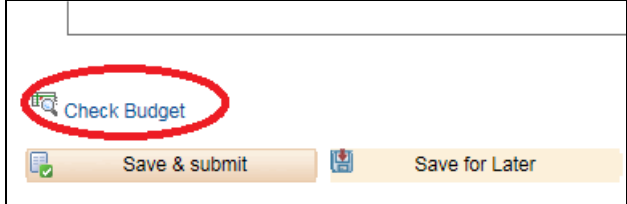
Step	Action
33.	<p>In the <b>Ship To</b> field, define the appropriate delivery location for the asset by selecting <b>Ship To</b> location. Enter the <b>Ship To</b> value, or use the lookup icon to select it.</p> <div data-bbox="321 646 792 810" style="border: 1px solid black; padding: 5px;"> </div>
34.	<p>Because the item is <b>Distributed By</b> quantity, verify that the <b>Liquidated By</b> field is also quantity.</p> <div data-bbox="321 932 1201 1155" style="border: 1px solid black; padding: 5px;"> </div>
35.	<p>If necessary, enter any <b>ChartField</b> values that did not default. (<b>Note:</b> In this step, you should confirm that the <b>Alt Account</b> populates as 721000, which indicates an asset.)</p> <div data-bbox="321 1314 1234 1549" style="border: 1px solid black; padding: 5px;"> </div>
36.	<p>Click the <b>Asset Information</b> tab.</p> <div data-bbox="321 1669 1328 1837" style="border: 1px solid black; padding: 5px;"> </div>





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Step	Action
37.	Verify that <b>UCF01</b> displays in the <b>AM Business Unit</b> field; if not, enter it.  
38.	Verify the <b>Profile ID</b> populated from the category.  
39.	Click the <b>Check Budget</b> link.  
40.	Verify the <b>Budget Status</b> is <b>“Valid,”</b> and click the <b>Save &amp; Submit</b> button to complete your requisition and enter it into the workflow.  