



# ADDY NOTES



## Creating a Multiple Distribution Line on a Requisition

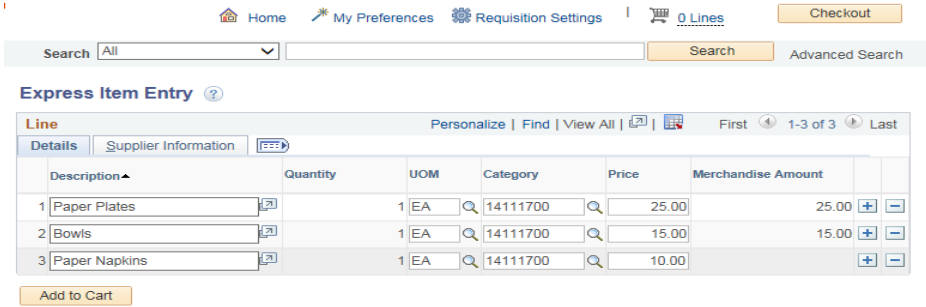
This Addy Note outlines the steps you will take to create a multiple distribution line requisition.

Step	Action
1.	Navigate to: <b>Main Menu &gt; eProcurement &gt; Requisition.</b>
2.	<p>On the <b>Requisition Settings</b> page, enter values for <b>Requisition Name, Supplier, Category, Unit of Measure and Due Date.</b></p> <p>In the <b>Default Options Section</b> of the page, select the <b>Override</b> radio button.</p> <div data-bbox="240 934 1203 1239" style="border: 1px solid #ccc; padding: 10px;"> <p><b>Requisition Settings</b></p> <p>Business Unit <input type="text" value="UCF01"/> University of Central Florida Requisition Name <input type="text"/></p> <p>*Requester <input type="text" value="moccil"/> Melissa Nagarden McKenzie Priority <input type="text" value="Medium"/></p> <p>*Currency <input type="text" value="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>Line Defaults ?</p> </div> <p>You should verify the default values are posted in the Accounting Defaults section of the page.</p> <p>Once you have entered and confirmed the data above, click the OK button to proceed to the <b>Express Item Entry</b> page.</p>



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3.	<p>In the <b>Express Item Entry</b> section, enter the relevant values to include the <b>Description and Price</b>.</p>  <p>Once the related values have been added, click <b>Add to Cart</b> and <b>Checkout</b> to proceed to the <b>Checkout – Review and Submit</b> page.</p>



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**Step 4.** In the **Requisition Lines** section of the Checkout – **Review and Submit** page, select **Expand All** to expand the requisition lines for all the lines of the requisition.

The screenshot displays the 'Requisition Lines' section with three requisition lines. Each line is expanded to show shipping details and accounting information. Red boxes highlight the 'SpChrt' checkbox in the Accounting Lines table for each line, and the 'Expand All' button at the bottom left.

**Accounting Lines Table (Line 1):**

Line	SpChrt	Merchandise Amt	Fund	PC Bus Unit	Oper Unit	Account	Dist Type	*Location	Percent	Ent
1	<input checked="" type="checkbox"/>	25.00	10001			738101		011600438E	100.0000	

**Accounting Lines Table (Line 2):**

Line	SpChrt	Merchandise Amt	Fund	PC Bus Unit	Oper Unit	Account	Dist Type	*Location	Percent	Entry Event
1	<input checked="" type="checkbox"/>	15.00	10001			738101		011600438E	100.0000	

**Accounting Lines Table (Line 3):**

Line	SpChrt	Merchandise Amt	Fund	PC Bus Unit	Oper Unit	Account	Dist Type	*Location	Percent	Entry Event
1	<input checked="" type="checkbox"/>	10.00	10001			738101		011600438E	100.0000	

**Buttons:**

- Deselect All
- Expand All
- Collapse All

**Total Amount:** 50.00 USD

Verify the **SpChrt Selection Box** is checked for the current Distribution Line.



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Step	Action
5.	<p>Select the first line that requires multiple distributions. You will scroll to right and select (+) plus sign to add another distribution line to the line of the requisition.</p>
6.	<p>For the sample requisition, we will be adding the additional distribution line to line 1 of the requisition.</p> <p>Next, verify the newly added Line now has SpChrt check box selected.</p>



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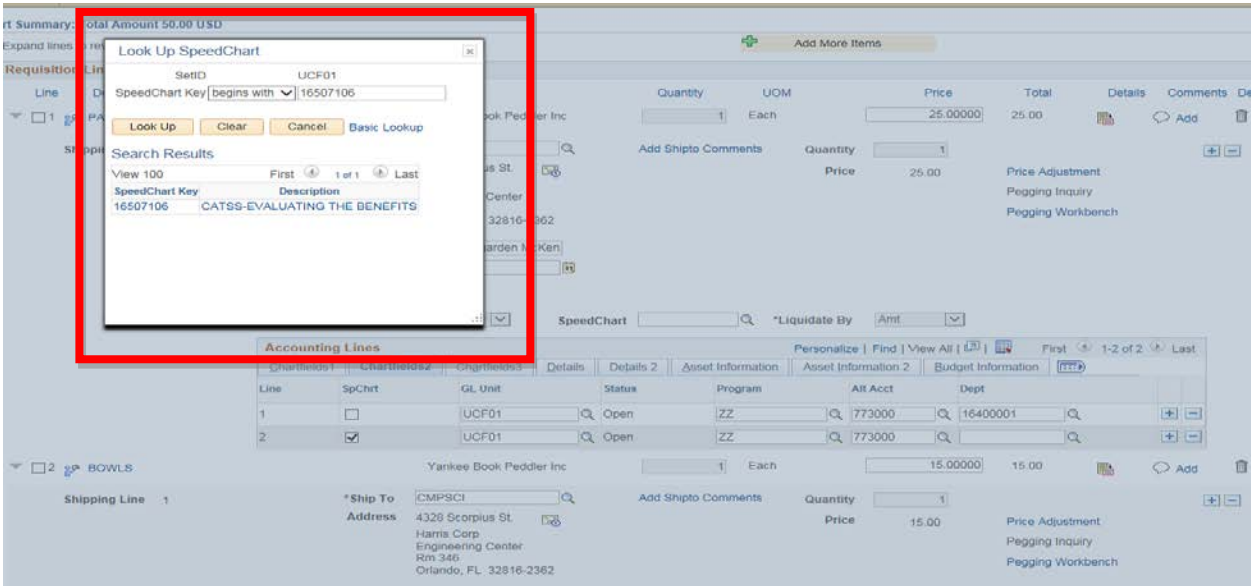


Step	Action
7.	<p>Next, select the <b>SpeedChart Look up</b> Icon.</p> <p>The screenshot shows a requisition line summary with a total amount of 50.00 USD. A 'Look Up SpeedChart' dialog box is displayed, allowing the user to search for a SpeedChart key. The search results show a key of 16507106 with the description 'CATSS-EVALUATING THE BENEFITS'. In the background, the requisition line details are visible, including a 'SpeedChart' field which is highlighted with a red box.</p>



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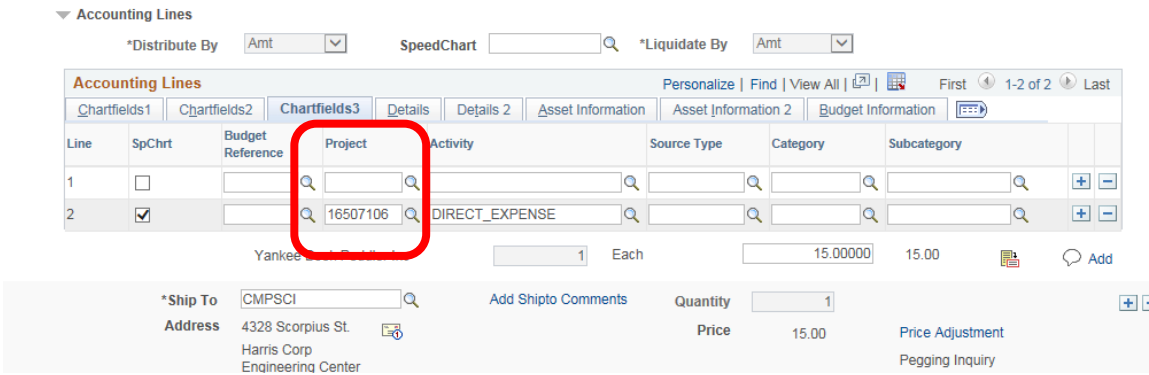
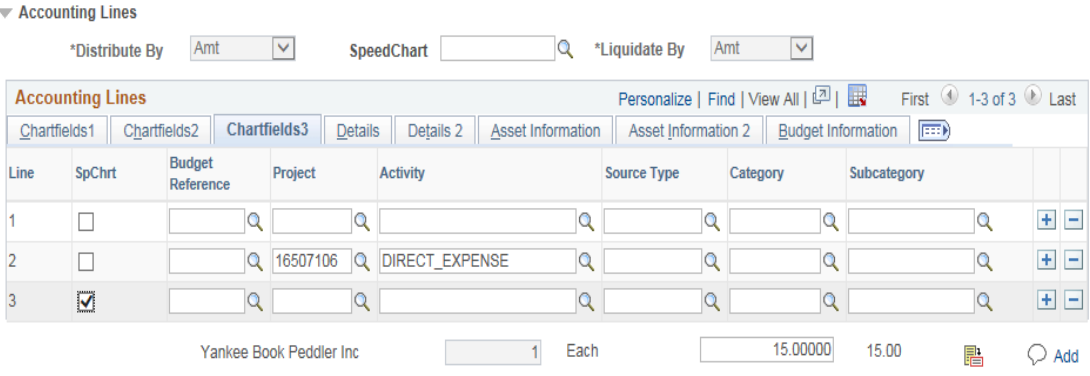


Step	Action
8.	<p>The <b>Look Up SpeedChart</b> pop up box appears. You will now search for the other Department/Project that will be sharing the cost of the item. For this example, we will search for Sponsored Project 16507106.</p>  <p>Once you have used the search function to locate the <b>SpeedChart</b> value, select the item from the search result.</p>



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Step	Action
<p>9.</p>	<p>Next, use the <b>Accounting Line</b> tabs to locate the <b>Project</b> column field, verify the new SpeedChart value that was selected is now populated in the distribution line.</p> 
<p>10.</p>	<p>If you wish to add an additional departments or projects to an item, you will repeat steps 5 – 8 above to add additional departments or projects to the requisition line.</p> 





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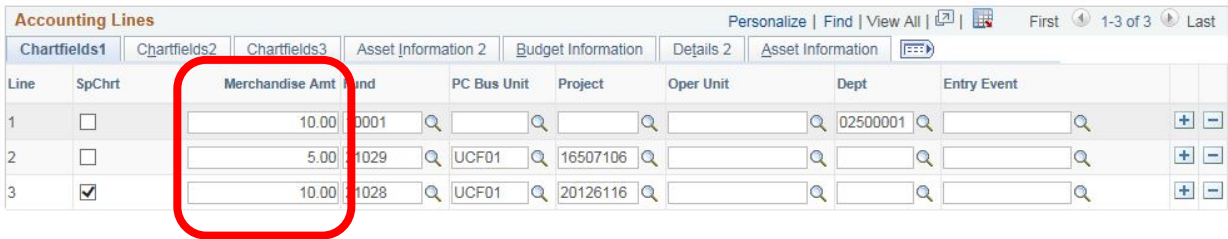
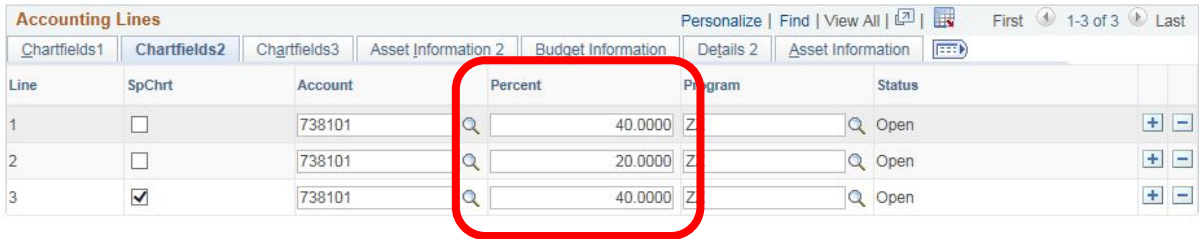
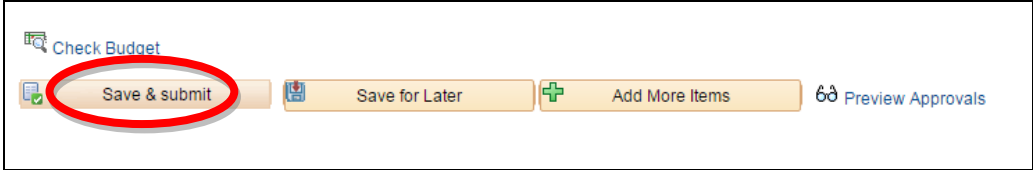
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11.	<p>Next, you will need to divide the cost of the item(s) in the line amongst the Department(s)/Project(s) on the Accounting Lines. This can be done either via the <b>Percent</b> column or the <b>Merchandise Amount</b> column. <b>Click through the Accounting Line tabs</b> to locate the column you wish to use to distribute the cost.</p> <p>To divide the cost using the <b>Percent</b> column, update the percent values that each department/project will be responsible for funding. The total of the percentages must equal 100%.</p> <div data-bbox="277 825 1461 1129" data-label="Form"> <p>Accounting Lines</p> <p>*Distribute By: Amt    SpeedChart:    *Liquidate By: Amt</p> <table border="1"> <thead> <tr> <th colspan="7">Accounting Lines</th> <th>Personalize</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1-3 of 3</th> <th>Last</th> </tr> <tr> <th>Chartfields1</th> <th>Chartfields2</th> <th>Chartfields3</th> <th>Asset Information 2</th> <th>Budget Information</th> <th>Details 2</th> <th>Asset Information</th> <th colspan="6"></th> </tr> <tr> <th>Line</th> <th>SpChrt</th> <th>Account</th> <th>Percent</th> <th>Program</th> <th>Status</th> <th colspan="7"></th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td>738101</td> <td>40.0000</td> <td>ZZ</td> <td>Open</td> <td colspan="7"></td> </tr> <tr> <td>2</td> <td><input type="checkbox"/></td> <td>738101</td> <td>30.0000</td> <td>ZZ</td> <td>Open</td> <td colspan="7"></td> </tr> <tr> <td>3</td> <td><input checked="" type="checkbox"/></td> <td>738101</td> <td>30.0000</td> <td>ZZ</td> <td>Open</td> <td colspan="7"></td> </tr> </tbody> </table> </div> <p>When you have entered the percent values, the <b>Merchandise Amount</b> column will adjust the amounts automatically to reflect the percentages you entered.</p> <div data-bbox="251 1257 1477 1560" data-label="Form"> <p>Accounting Lines</p> <p>*Distribute By: Amt    SpeedChart:    *Liquidate By: Amt</p> <table border="1"> <thead> <tr> <th colspan="10">Accounting Lines</th> <th>Personalize</th> <th>Find</th> <th>View All</th> <th>First</th> <th>1-3 of 3</th> <th>Last</th> </tr> <tr> <th>Chartfields1</th> <th>Chartfields2</th> <th>Chartfields3</th> <th>Asset Information 2</th> <th>Budget Information</th> <th>Details 2</th> <th>Asset Information</th> <th colspan="4"></th> <th colspan="3"></th> </tr> <tr> <th>Line</th> <th>SpChrt</th> <th>Merchandise Amt</th> <th>Fund</th> <th>PC Bus Unit</th> <th>Project</th> <th>Oper Unit</th> <th>Dept</th> <th>Entry Event</th> <th colspan="7"></th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="checkbox"/></td> <td>10.00</td> <td>0001</td> <td></td> <td></td> <td></td> <td>02500001</td> <td></td> <td colspan="7"></td> </tr> <tr> <td>2</td> <td><input type="checkbox"/></td> <td>7.50</td> <td>029</td> <td>UCF01</td> <td>16507106</td> <td></td> <td></td> <td></td> <td colspan="7"></td> </tr> <tr> <td>3</td> <td><input checked="" type="checkbox"/></td> <td>7.50</td> <td>028</td> <td>UCF01</td> <td>20126116</td> <td></td> <td></td> <td></td> <td colspan="7"></td> </tr> </tbody> </table> </div>	Accounting Lines							Personalize	Find	View All	First	1-3 of 3	Last	Chartfields1	Chartfields2	Chartfields3	Asset Information 2	Budget Information	Details 2	Asset Information							Line	SpChrt	Account	Percent	Program	Status								1	<input type="checkbox"/>	738101	40.0000	ZZ	Open								2	<input type="checkbox"/>	738101	30.0000	ZZ	Open								3	<input checked="" type="checkbox"/>	738101	30.0000	ZZ	Open								Accounting Lines										Personalize	Find	View All	First	1-3 of 3	Last	Chartfields1	Chartfields2	Chartfields3	Asset Information 2	Budget Information	Details 2	Asset Information								Line	SpChrt	Merchandise Amt	Fund	PC Bus Unit	Project	Oper Unit	Dept	Entry Event								1	<input type="checkbox"/>	10.00	0001				02500001									2	<input type="checkbox"/>	7.50	029	UCF01	16507106											3	<input checked="" type="checkbox"/>	7.50	028	UCF01	20126116										
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