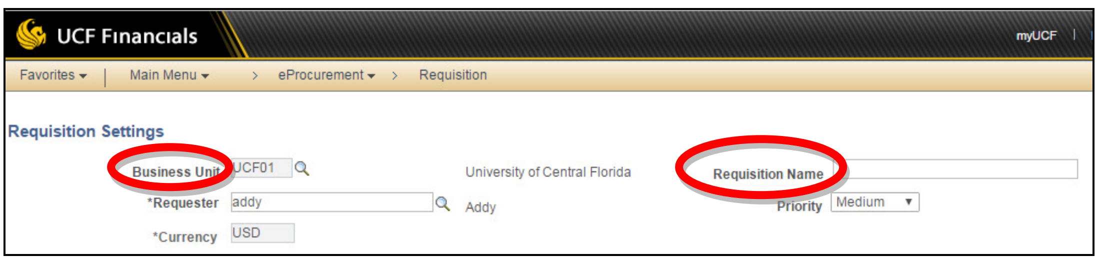
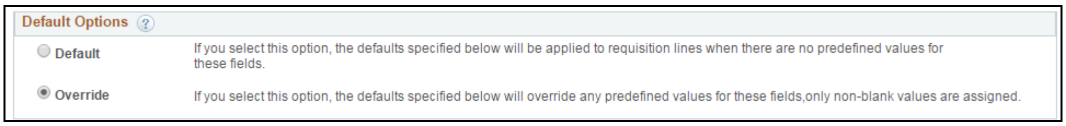
Creating a Requisition

This Addy Note outlines the steps you'll take to create a requisition.

Step	Action
1.	Navigate to: **Main Menu** > **eProcurement** > **Requisition**.
2.	The **Requisition Settings** page will display. This page is primarily used to enter default values to populate fields on sub-sequent pages of your requisition. Select a **Business Unit**, then enter a description in the **Requisition Name** field.  **Note**: The name you enter will display on many requisition pages, including **Manage Requisitions**, **Approve Requisitions**, and **Receive Items**. If you leave the **Requisition Name** field blank, the numeric ID assigned to the requisition will automatically populate the **Requisition Name** field. **Note**: See Addy Note *Confirming the Correct Business Unit* if you are unsure which Business Unit to use.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>
The **Default Options** section determines how your entries in the **Line Defaults** section are applied to the requisition.

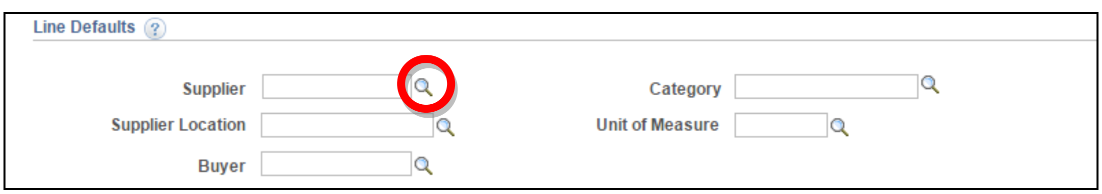


The **Default** button should be selected if:

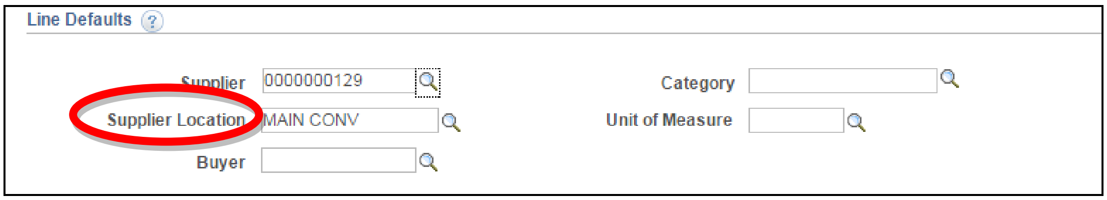
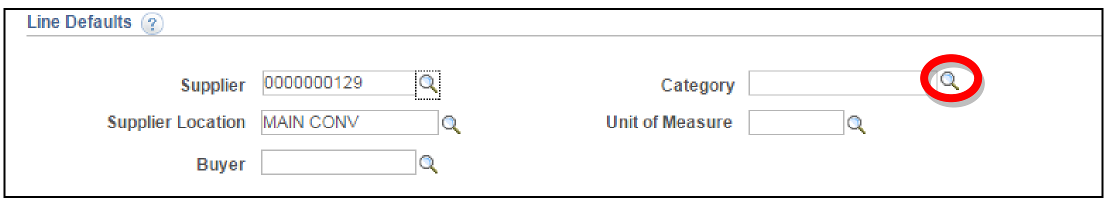
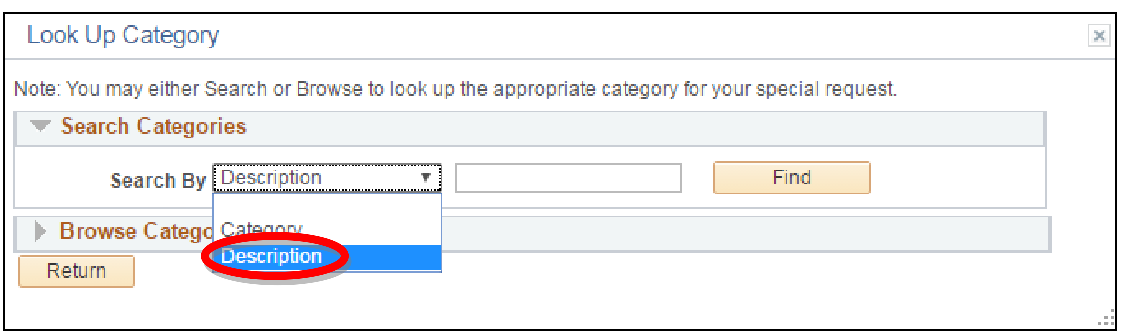
- The default settings that are automatically populated are correct for most of the lines on your requisition.
- You need to have multiple ChartFields on your requisition.

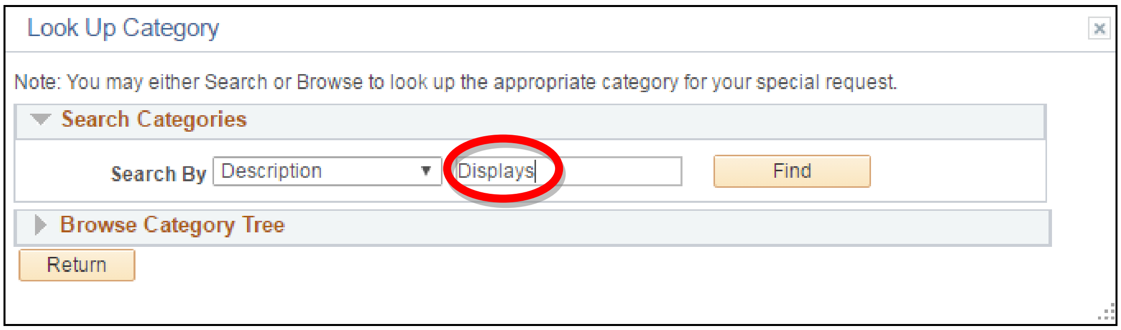
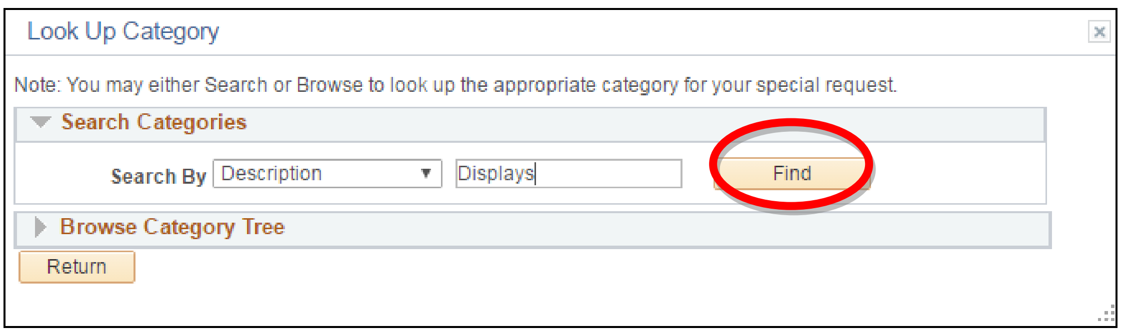
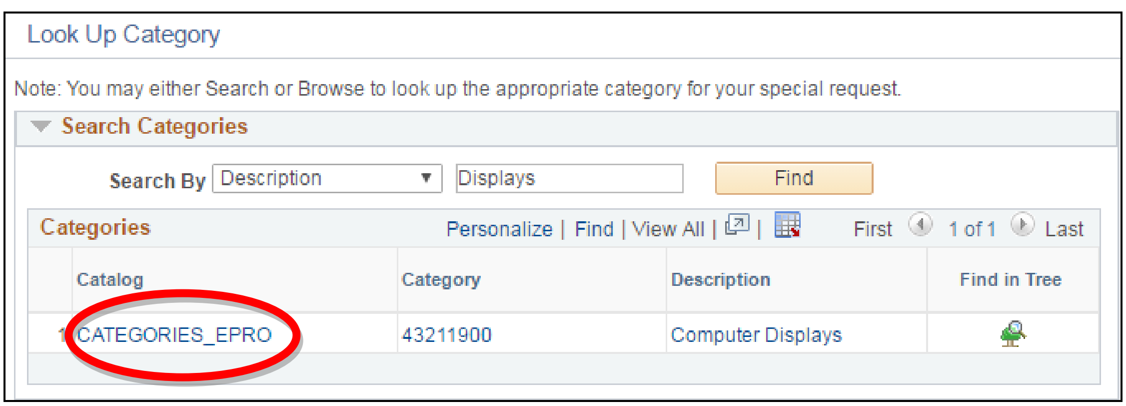
The **Override** button should be selected if:

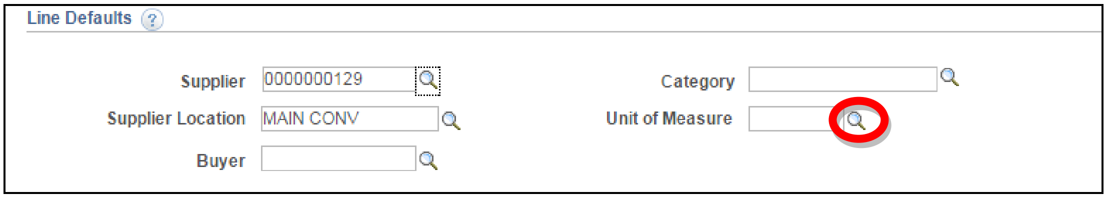
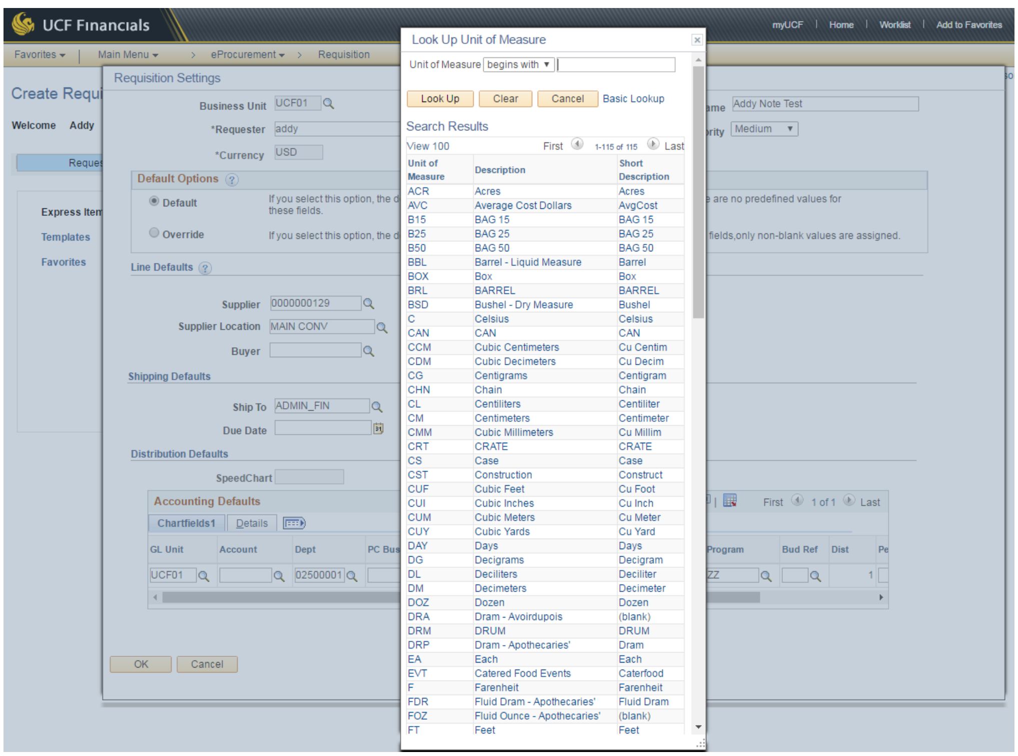
- You need to change the requisition lines from the default settings to a new ChartField for most lines of your requisition.
- You need to change a default value on this page.
- A department number defaults when you open a new requisition and you are going to need to change to a project number.
</td></tr>
<tr><td>4.</td><td>
Enter the supplier ID in the **Supplier** field, or click the lookup icon to search for a supplier.



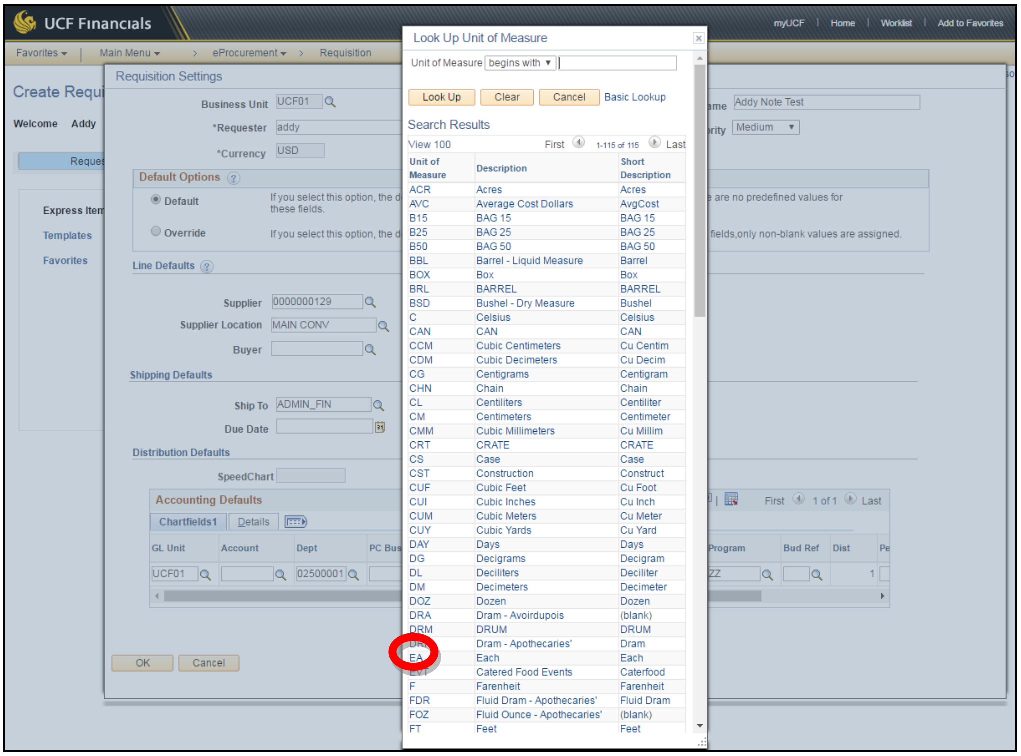
</td></tr>
</table>

Step	Action
5.	Press the **Tab key** on your keyboard to populate the **Supplier Location** based on the **Supplier** you selected.  **Note**: To search for an alternate vendor, click the lookup icon.
6.	Next, select a **Category** by clicking the lookup link.  The **Category** classifies the item you are purchasing according to shared characteristics. **Note**: If you do not enter a category on this page, you will be required to complete this field line by line on the next page.
7.	The **Look Up Category** pop up window will display.  Click the down arrow next to the **Search By** field and select **Description**.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>In the Search field, type a descriptive term or portion of a term of the category that applies to the item(s) you are purchasing. For this example, we will search for Displays.

</td></tr>
<tr><td>9.</td><td>Click Find.

</td></tr>
<tr><td>10.</td><td>Click the link of the Category you want to assign to the requisition.

</td></tr>
</table>

Step	Action
11.	Select a **Unit of Measure (UOM)** by clicking the lookup icon. 
12.	The **Look Up Unit of Measure** pop up window will display. 

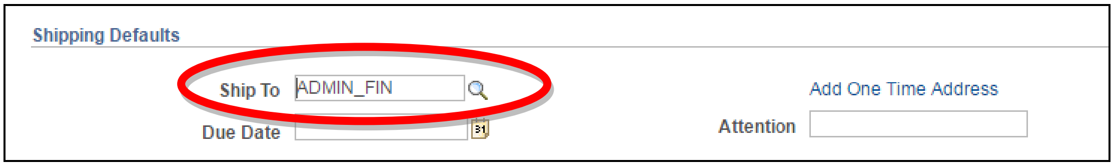
Step	Action
13.	For this example we will select the **EA** link.



Note: The most common Unit of Measure selections include:

- EA – Each
- LOT – Batch Lot
- TRP - Trip

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>Verify that the default Ship To location is correct. If necessary, enter the correct value.

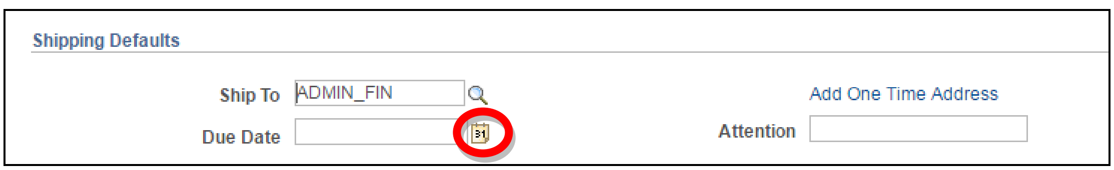


Note: The value in the Ship To field should be the location where you normally receive goods or services. Alternatively, enter a different location value in the Ship To field if one of the following situations applies to you:

• If you are receiving an asset, the asset should go to Central Receiving, so enter RECV in the Ship To field.

• If you are preparing a travel requisition, enter FIN in the Ship To field.

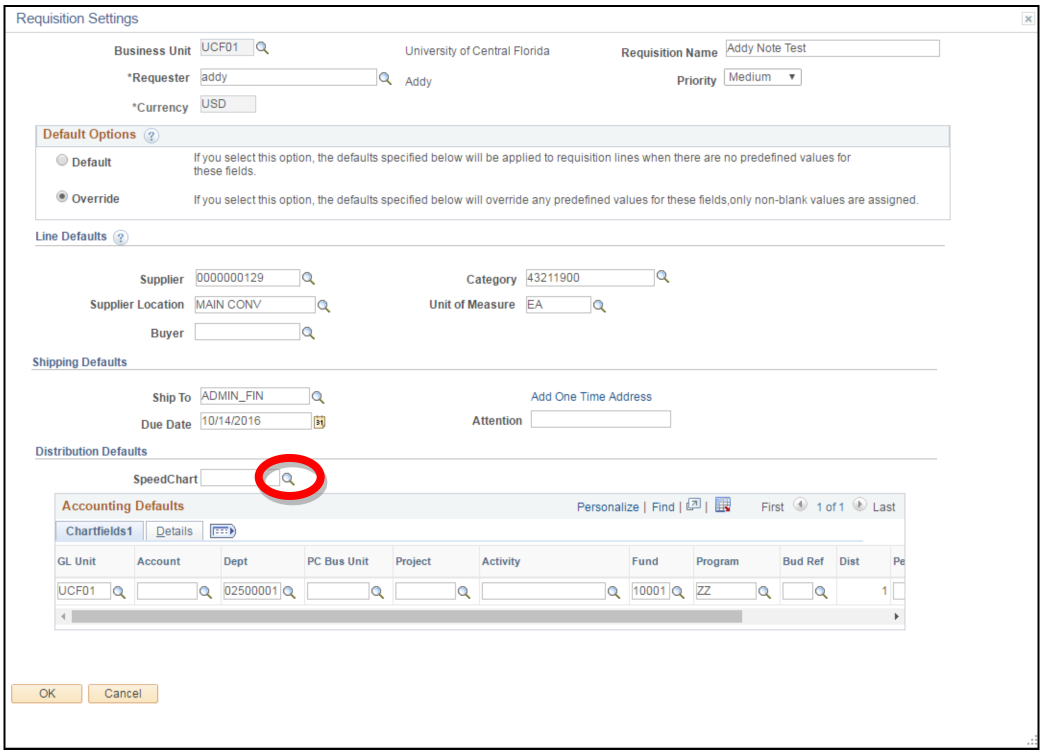
Note: If the system does not contain a Ship To value for your location, request a value by emailing the Financials Service Desk at fntrain@ucf.edu or by calling (407) 823-5117, option 6.</td></tr>
<tr><td>15.</td><td>Select a Due Date by clicking the Choose a Date icon.



Note: Make sure you choose a date that is appropriate for the type of requisition you are creating.

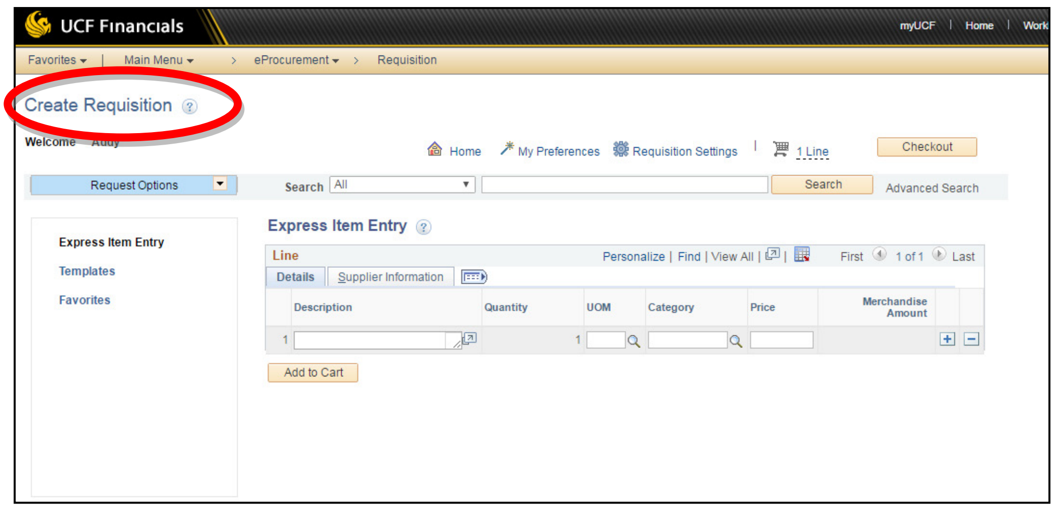
For goods and services:
• For goods, select a date that the goods are to be received at UCF.
• For services, select a date that the services will be completed.

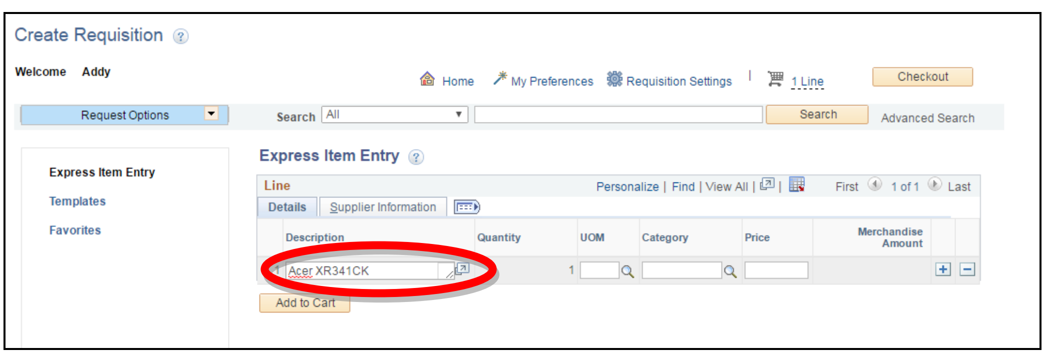
For travel:
• Select a date that the traveler is scheduled to arrive back home.</td></tr>
</table>

Step	Action
16.	If you need to enter a new **SpeedChart** value, click the look up icon to find a value. Make sure the **Override** button is selected in the **Default Options** section, enter the new SpeedChart (i.e., department or project) number, and then click the tab key on your keyboard to complete the change. 
17.	Click **OK**. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18.</td><td>The Create Requisition page is now displayed. This page is used to enter information about the items being purchased.

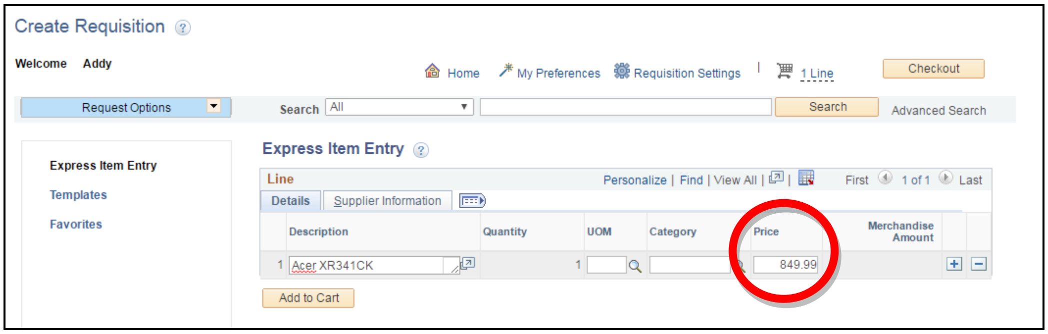
Note: UCF does not use the Item ID field and the screen shot below has been personalized to hide that field and the Item Information tab. To personalize your own page, see the Addy Note Special Personalizations for all Requesters.


</td></tr>
<tr><td>19.</td><td>Enter a description of your first item in the Description field.

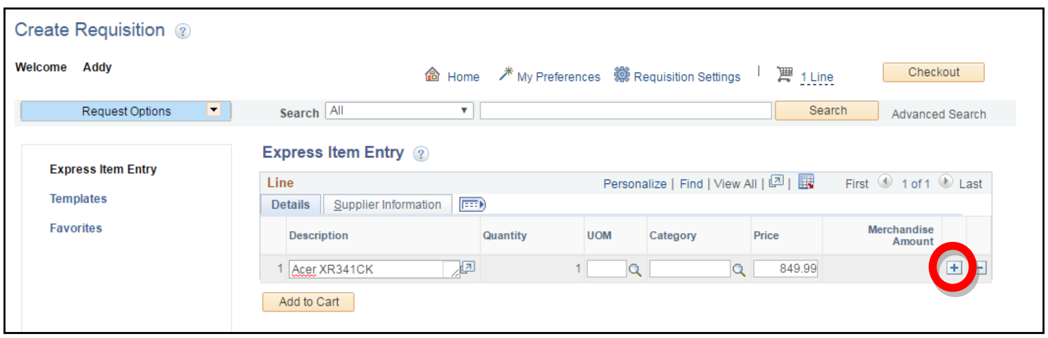

</td></tr>
</table>

Step	Action

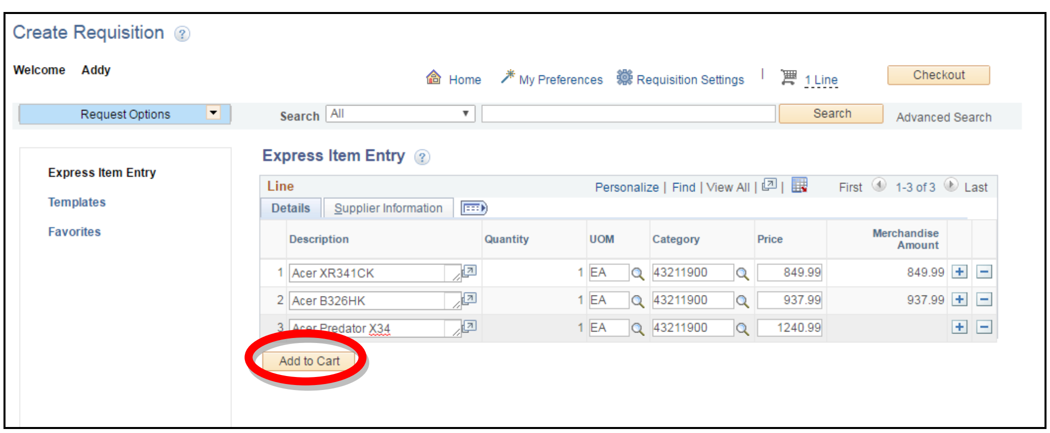
20. Next, enter a price for your item in the **Price** field.

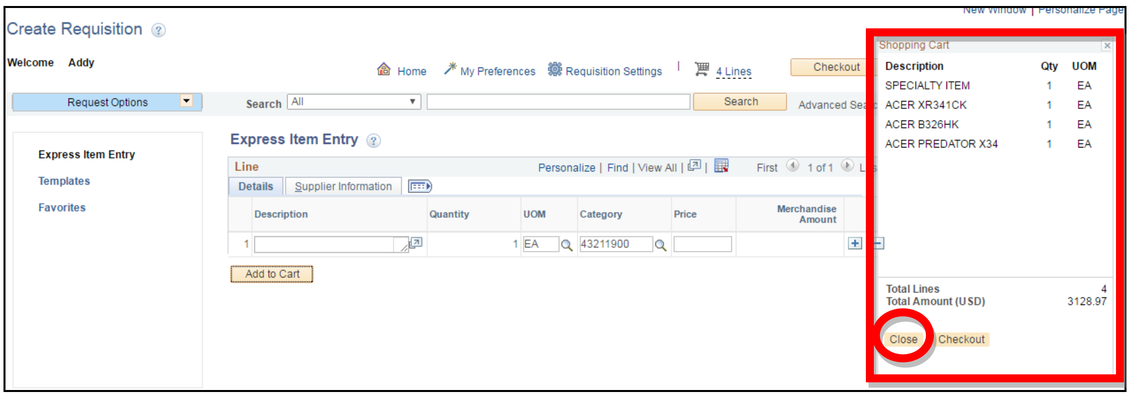


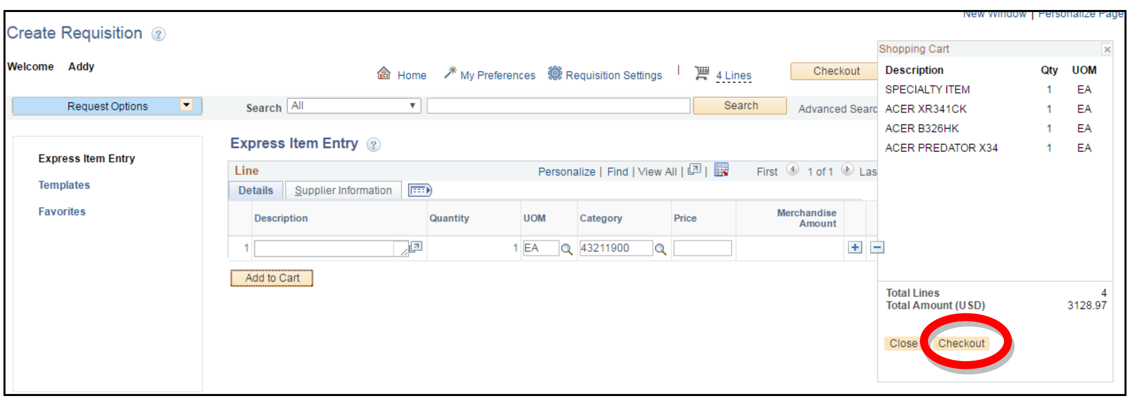
21. To add additional requisition lines, click the **Plus (+)** sign.

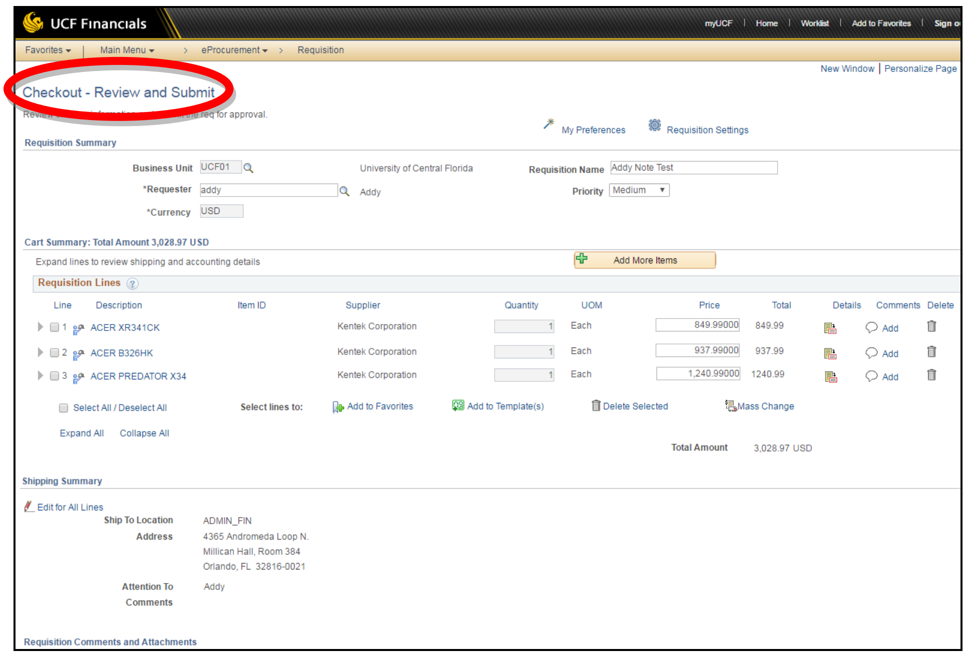
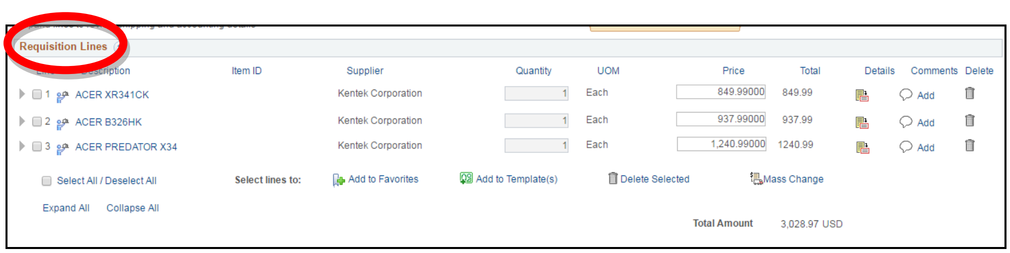


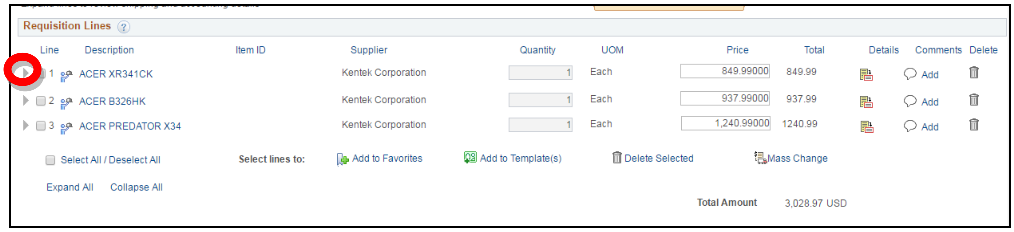
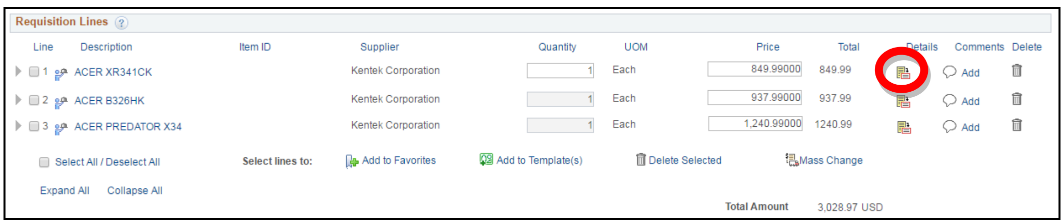
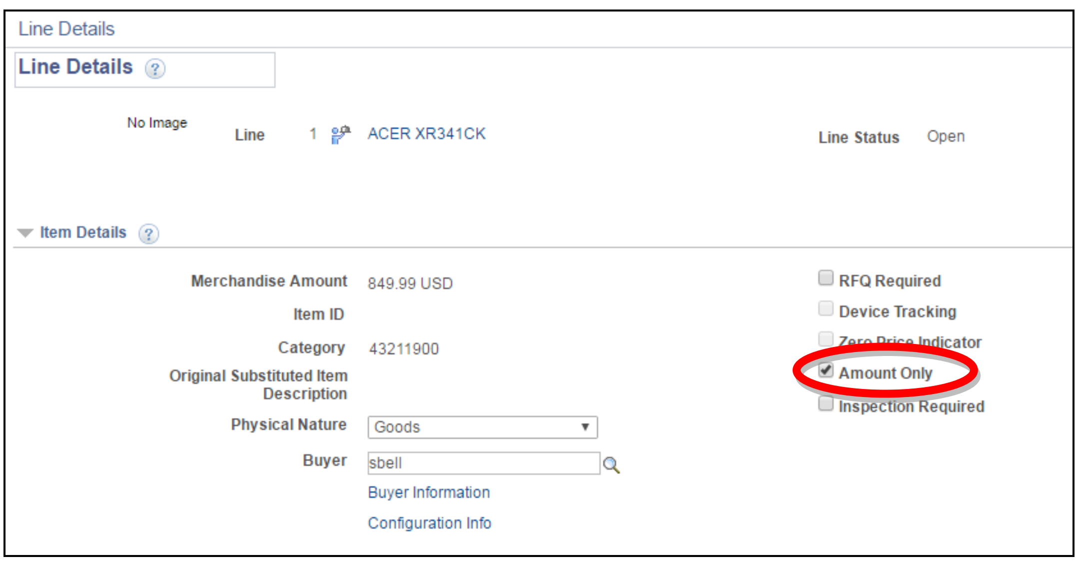
22. Once you have added all the lines and items necessary, click **Add to Cart**.

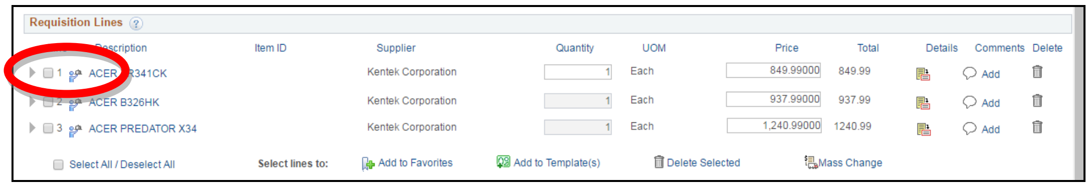
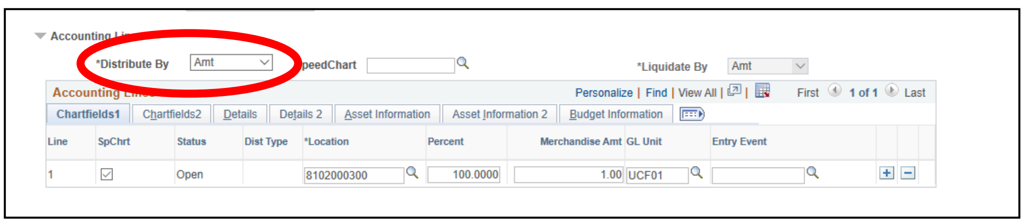


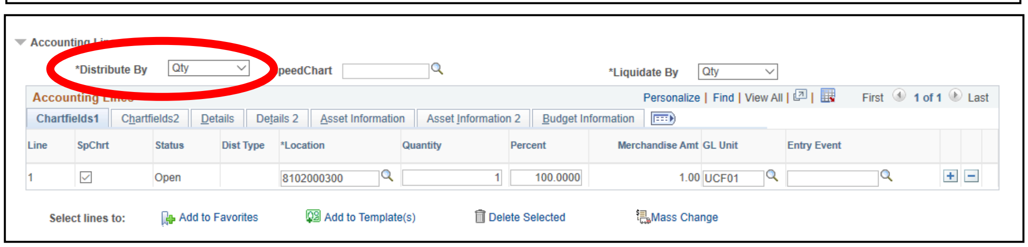
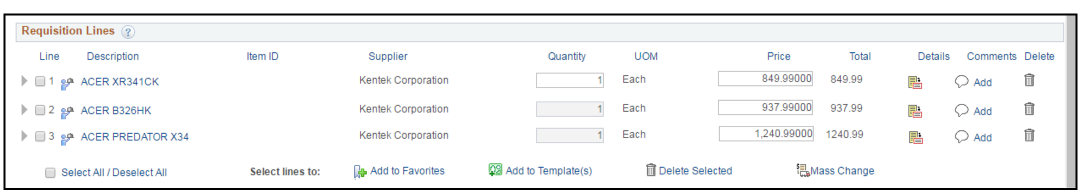
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>23.</td><td>Click the Shopping Cart icon at the top of the page. You can see the lines of your requisition you already entered will display.


Click Close.</td></tr>
<tr><td>24.</td><td>When you have finished adding all necessary req lines, click Checkout on either the shopping cart summary or at the top of the Create Requisition page.

</td></tr>
</table>

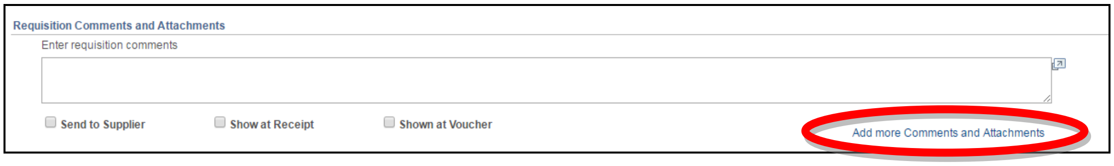
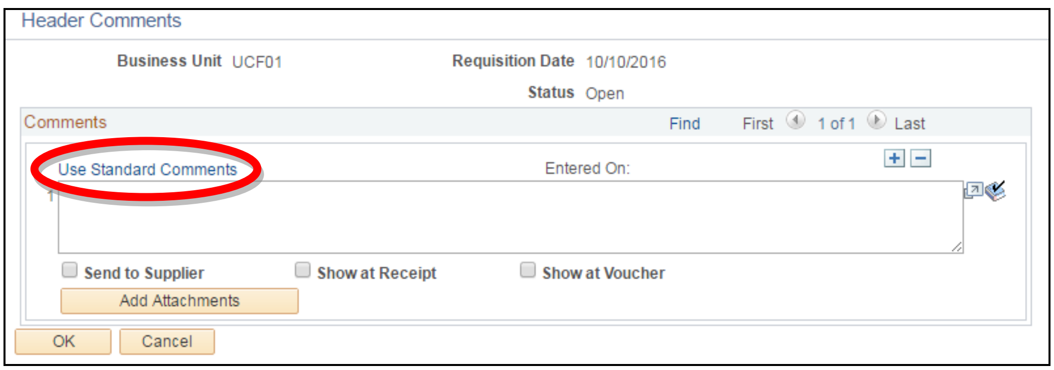
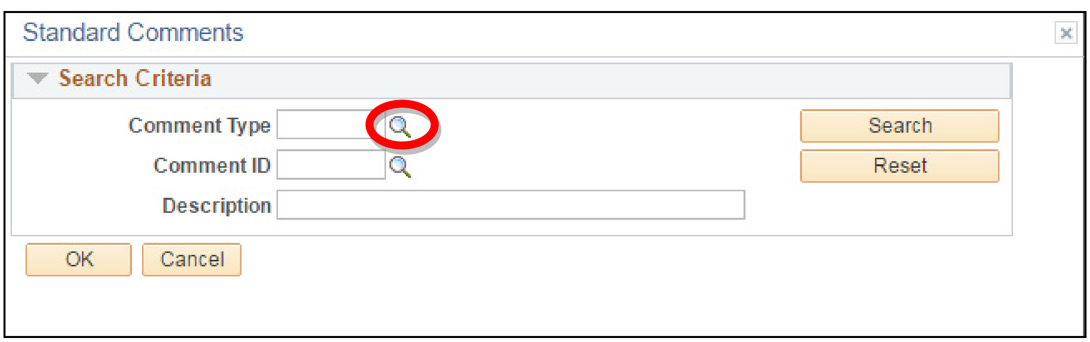
Step	Action
25.	The **Checkout – Review and Submit** page will display. This page is used to make required adjustments, enter comments, preview approvals, check budget, and save and submit your requisition. 
26.	The **Requisition Lines** section includes all the lines of the requisition. 

Step	Action
27.	Click the **Expand Section** arrow in front of the line you wish to review. 
28.	To change the quantity of a line, click the **Details** icon. 
29.	Deselect the **Amount Only** checkbox. Click **OK**. 

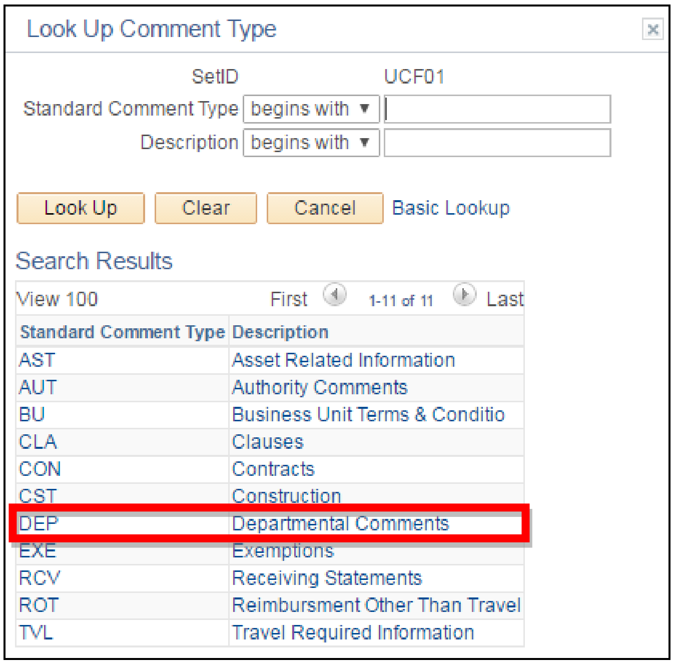
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>30.</td><td>Next, use the arrow to expand the line that you need to adjust to change the quanity.

</td></tr>
<tr><td>31.</td><td>Under the item, select the arrow to expand the Account Lines section. Select the Distributed By drop-down arrows to change the status from Amt to Qty.



</td></tr>
<tr><td>32.</td><td>Adjust the amount under the Quanity column for the amount required.


Note: Repeat steps 31 and 32 as needed for all lines for which you need to edit the quantity.</td></tr>
</table>

Step	Action
33.	Click **Add more Comments and Attachments** to add a comment to the requisition. 
34.	The **Header Comments** pop up window displays. Click the **Use Standard Comments** link. 
35.	Click the **Look up Comment Type** icon. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>36.</td><td>Click the Departmental Comments link.

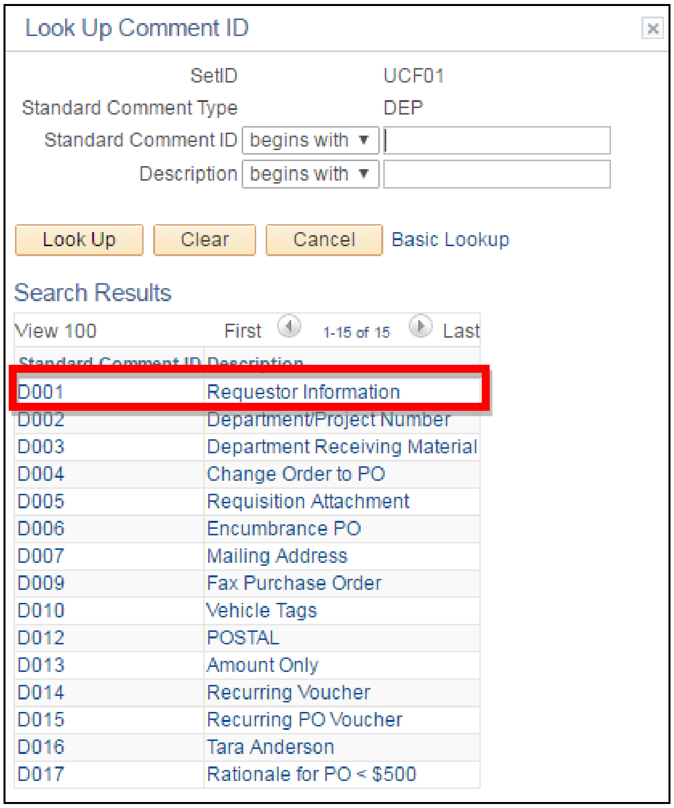


</td></tr>
<tr><td>37.</td><td>Click the Look Up Comment ID icon.

</td></tr>
</table>

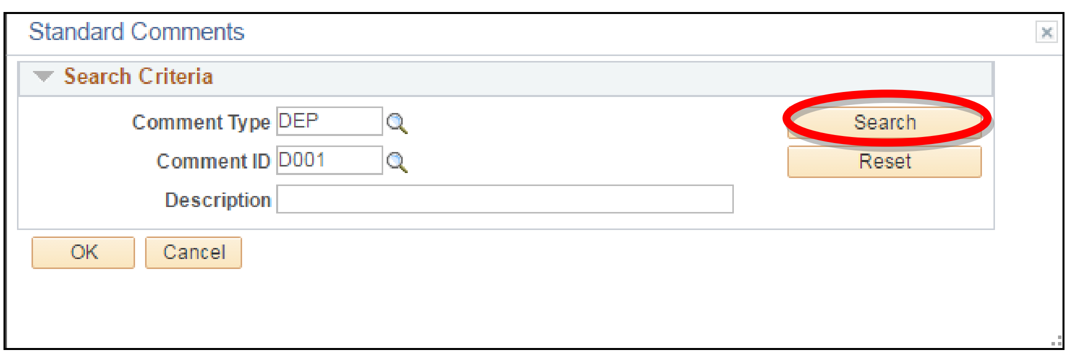
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>38.</td><td>

Click the **Requestor Information** link.

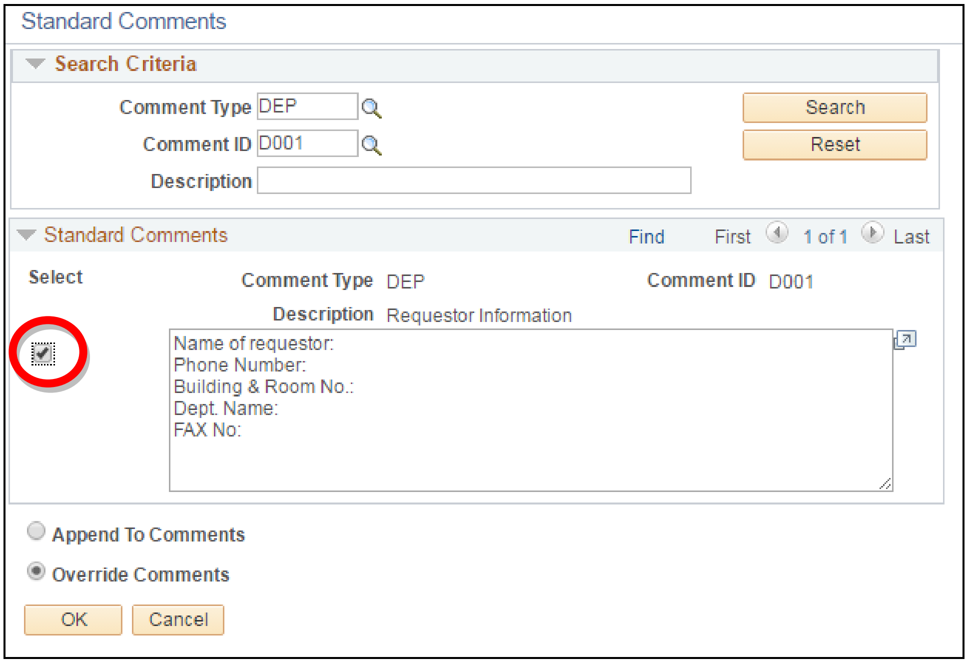


</td></tr>
<tr><td>39.</td><td>

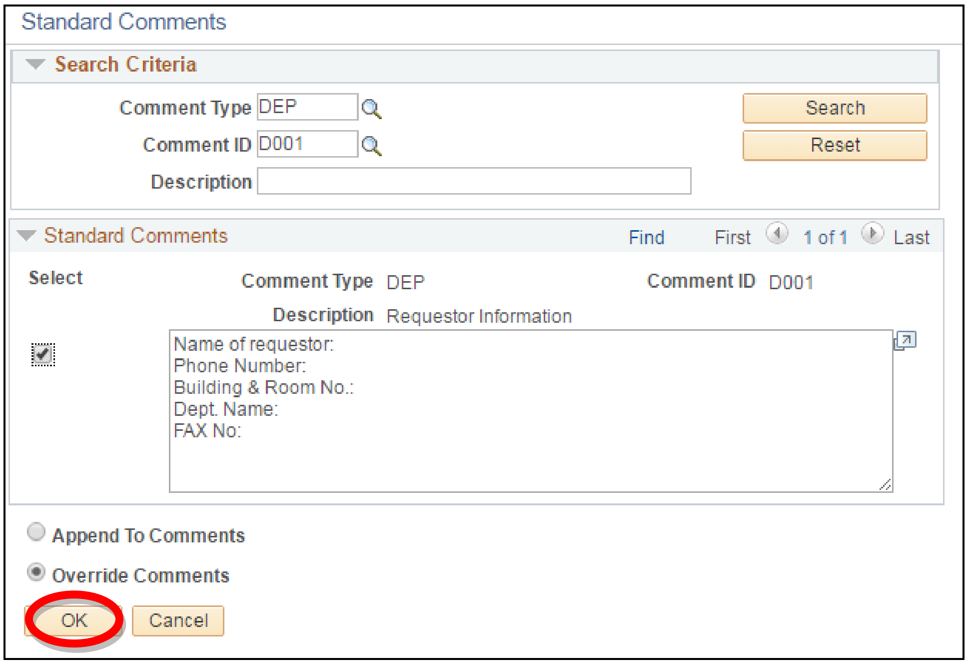
Click **Search**.



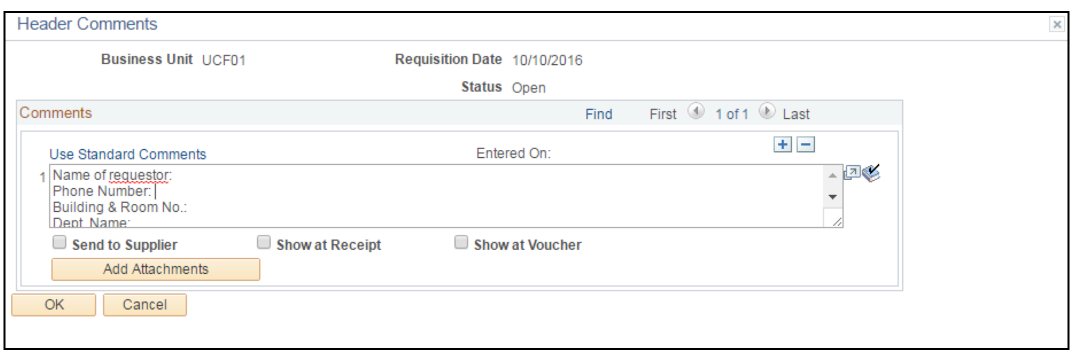
</td></tr>
</table>

Step	Action
40.	Click the **Select** checkbox to add the comment to the comment field.  **Note**: Your approver may require you to add a comment and any attachments on Line 1 of the requisition as well.

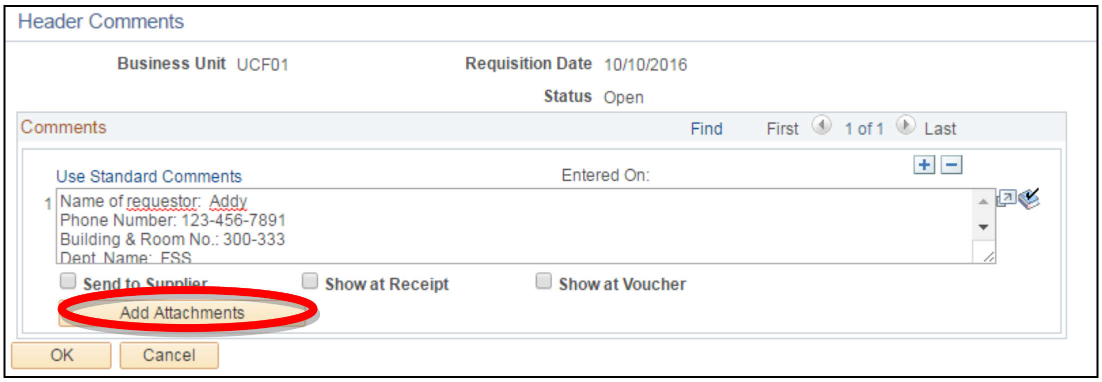
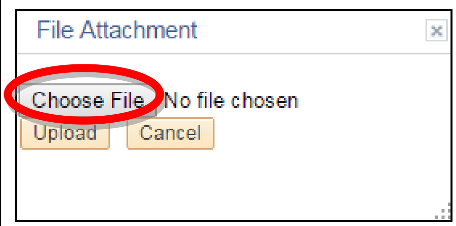
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>41.</td><td>Click OK.



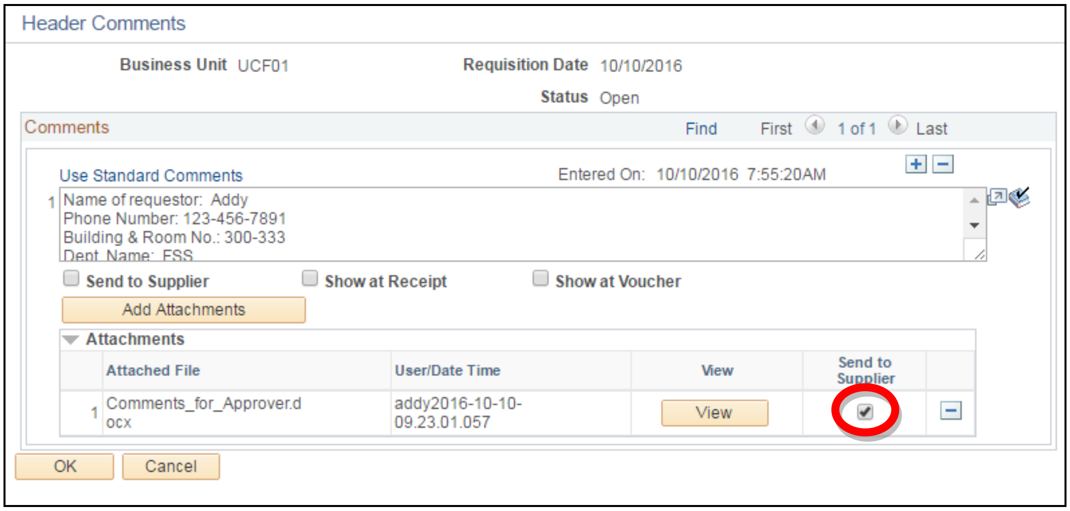
</td></tr>
<tr><td>42.</td><td>Click in the field to complete the comment with your personalized information.



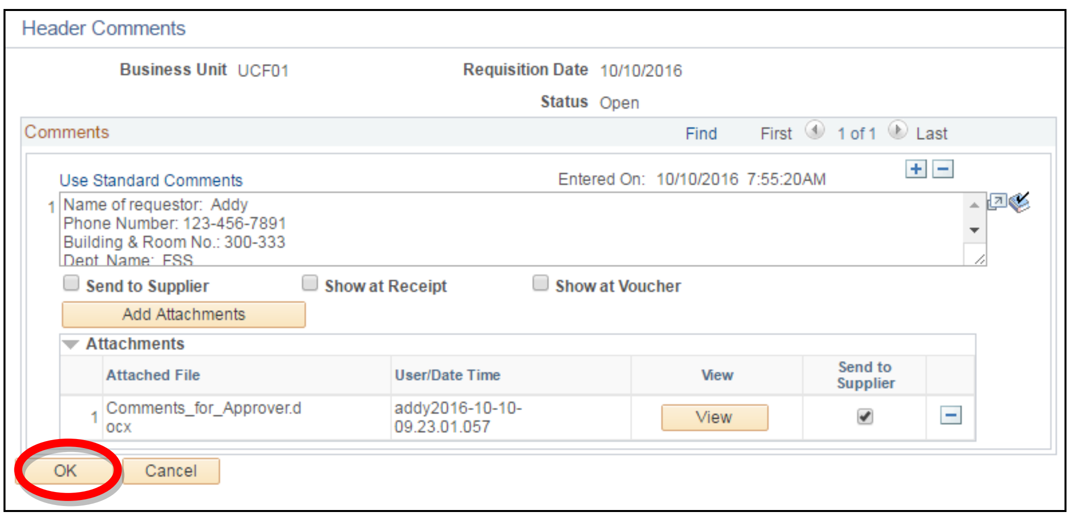
</td></tr>
</table>

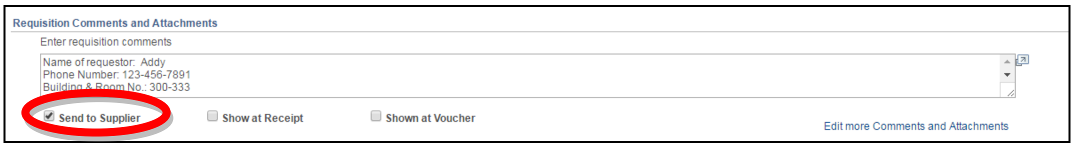
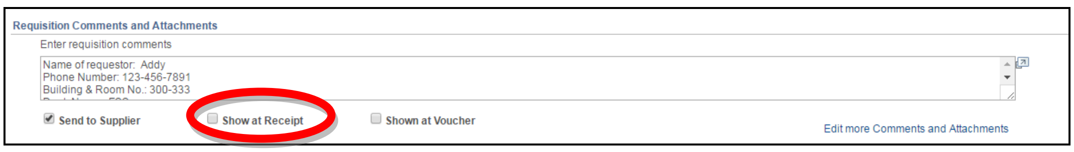
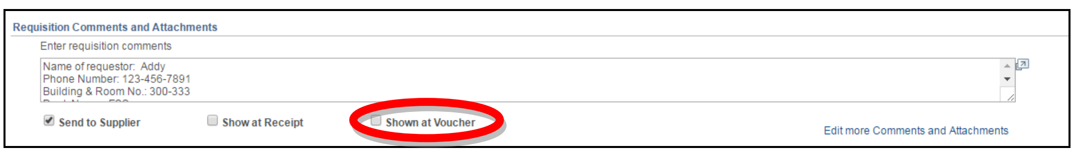
Step	Action
43.	Next, add a quote for your approver to review. Click **Add Attachments**. 
44.	Click **Choose File** to search your computer for a file. 
45.	Click **Upload**. 

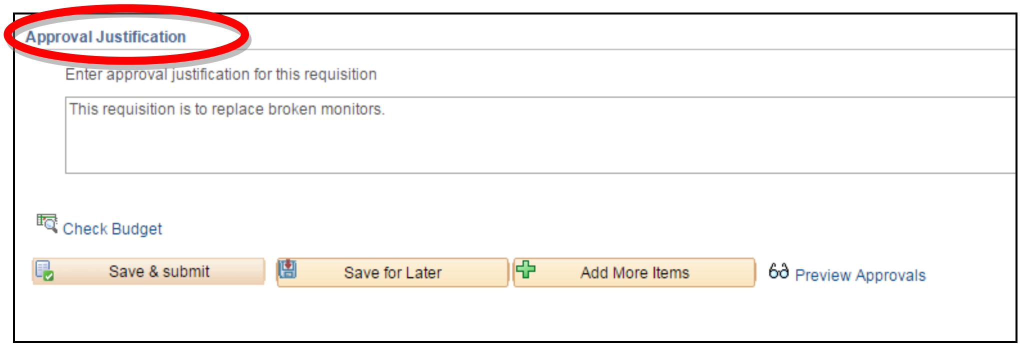
Step	Action
46.	If you want the supplier to see the attachment, click the **Send to Supplier** checkbox.

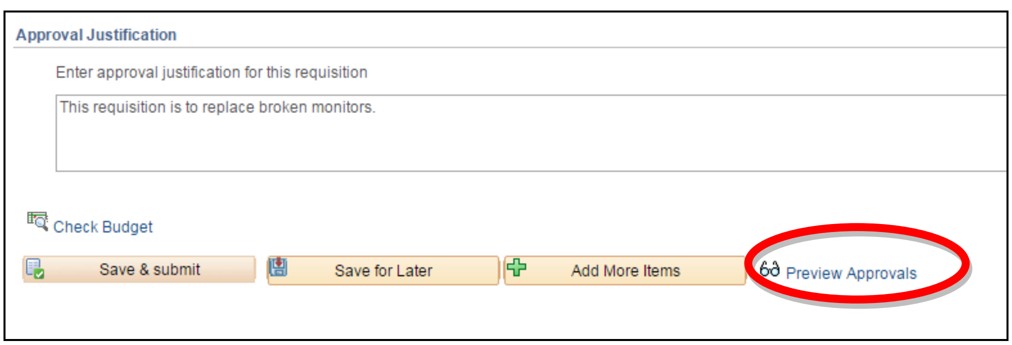


Step	Action
47.	Click **OK**.

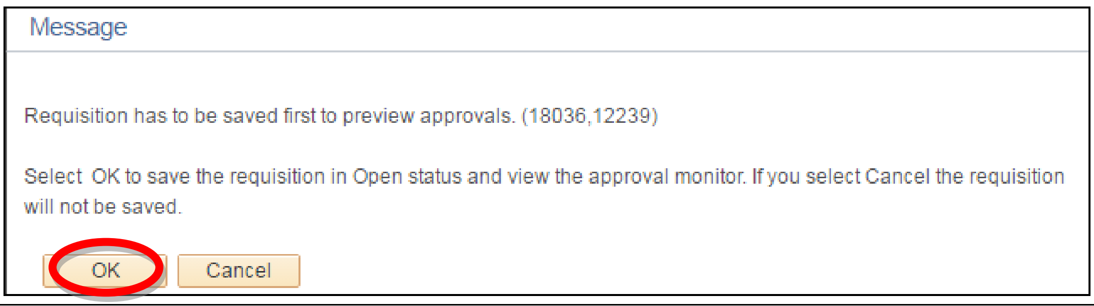


Step	Action
48.	Click the **Sent to Supplier** checkbox if you want the comment to print on the purchase order for the supplier to review. 
49.	Click the **Show at Receipt** checkbox if you want the person or department performing the receiving to view the comment. 
50.	Click the **Shown at Voucher** checkbox if you want the Accounts Payable department to see the comment while paying the associated voucher. 

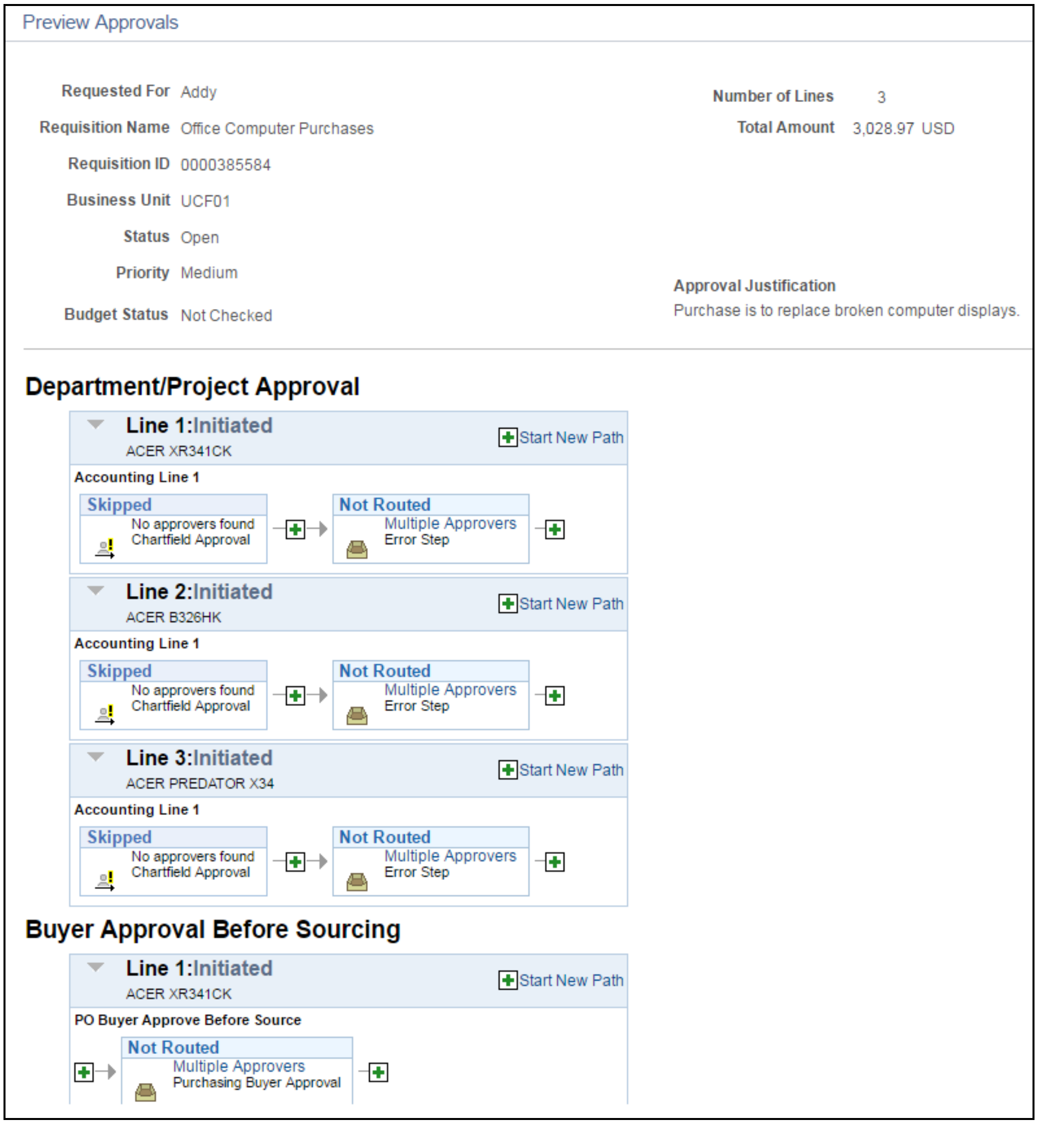
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>51.</td><td>The Approval Justification section provides you with a distinct section for typing a justification comment for your requisition.


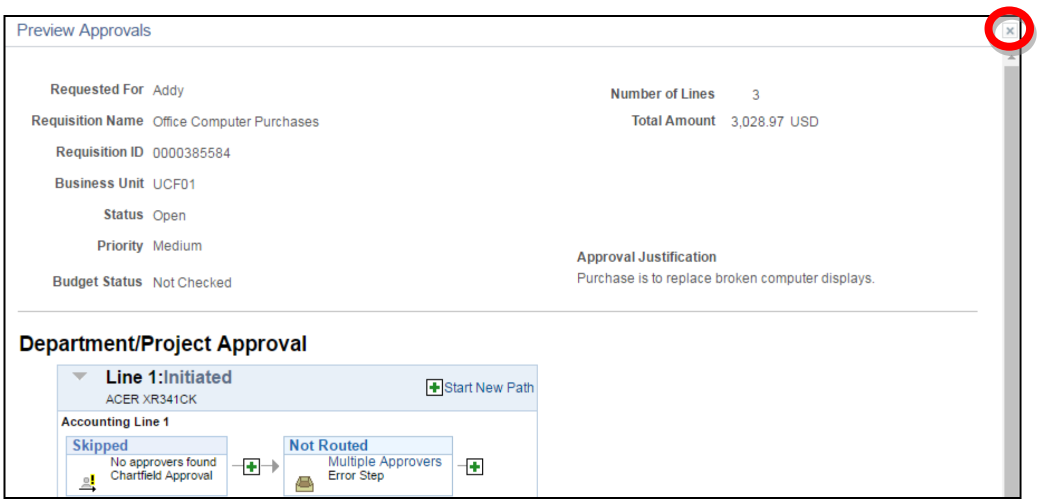
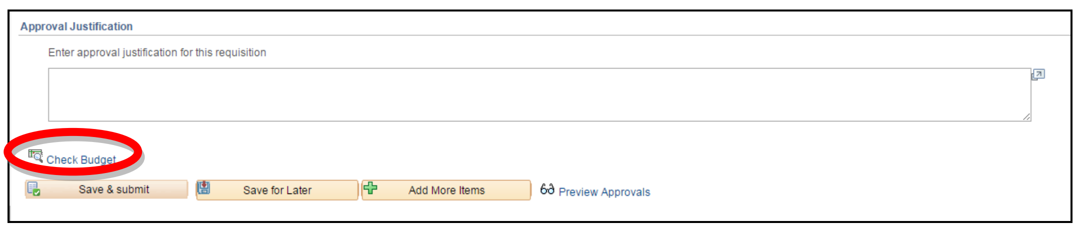
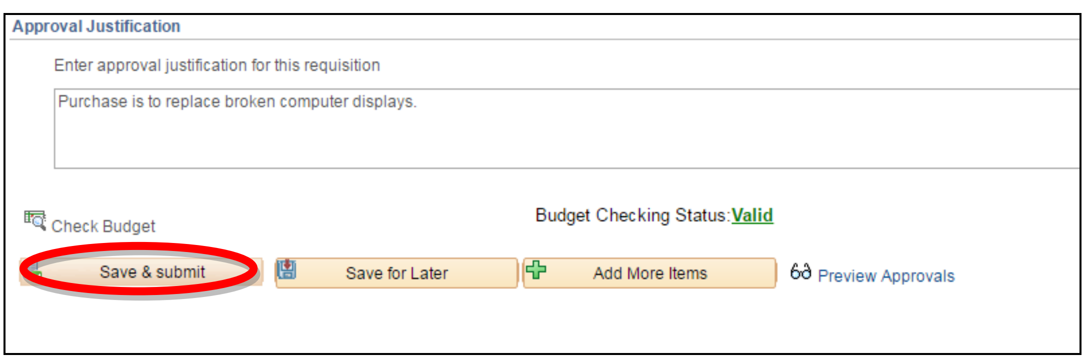
Note: The justification comment is the only header comment that appears on the workflow routing page that approvers can see at a glance. Thus, it is highly recommended that you use the justification comment to add helpful information such as the purpose of the requisition to allow approvers to move efficiently through the approval process.</td></tr>
<tr><td>52.</td><td>Next, preview the approval process. Click the Preview Approvals link.

</td></tr>
</table>

Step	Action
53.	A message displays to advise you that the requisition will be saved in an **Open** status to preview the approvals. Click **OK**.



Step	Action
54.	The **Preview Approvals** pop up window displays.



Step	Action
55.	Click **Close** or **x** to return to the **Checkout-Review and Submit** screen. 
56.	Click the **Check Budget** link to validate the budget for this requisition. 
57.	The **Budget Checking Status** should display as **Valid**. Click **Save & Submit** to initiate the workflow approval process and send the requisition to you approver. 

Step	Action
58.	The **Confirmation** page will display when you have successfully submitted the requisition.