

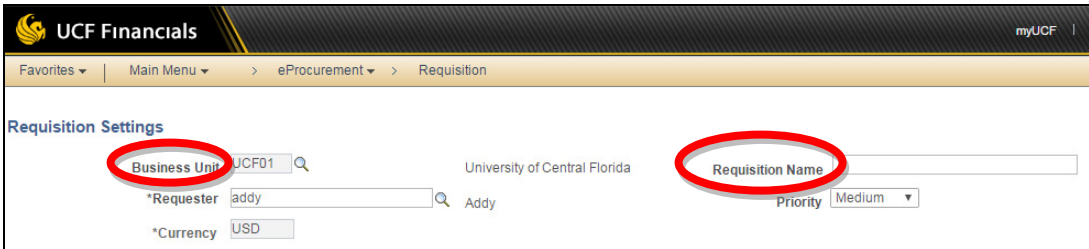


ADDY NOTES



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.



ADDY NOTES

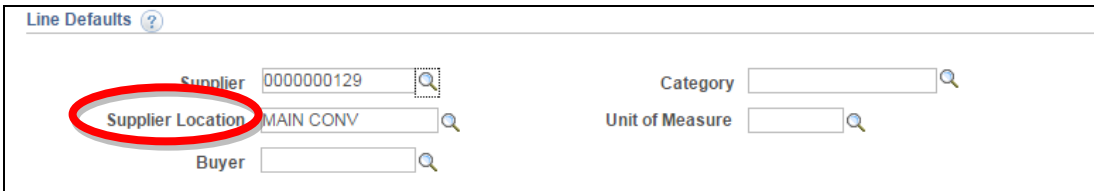
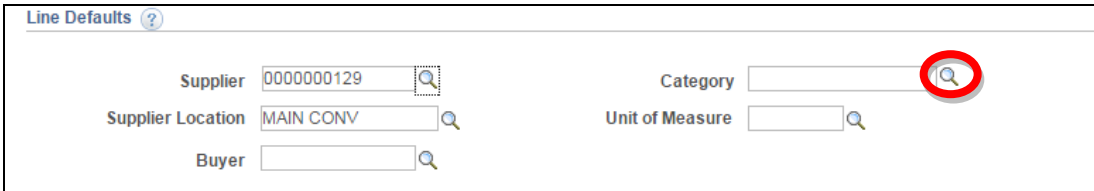
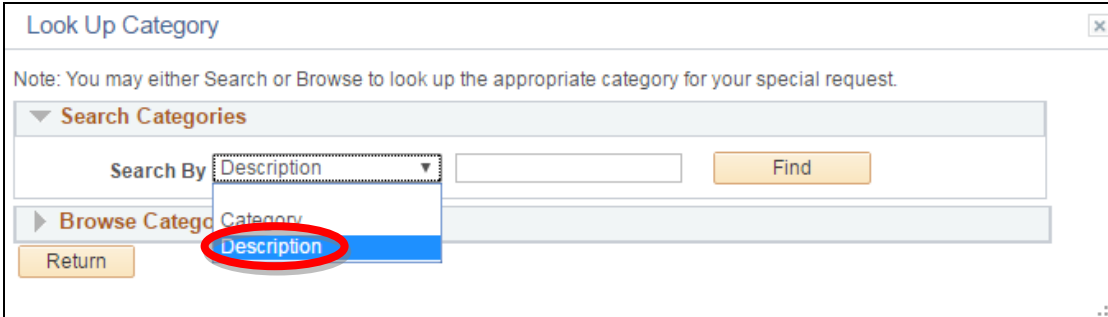


Step	Action
3.	The Default Options section determines how your entries in the Line Defaults section are applied to the requisition. Default Options ? ☐ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields. ☒ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned. 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.
4.	Enter the supplier ID in the Supplier field, or click the lookup icon to search for a supplier. Line Defaults ? Supplier  Supplier Location  Buyer  Category  Unit of Measure 



ADDY NOTES

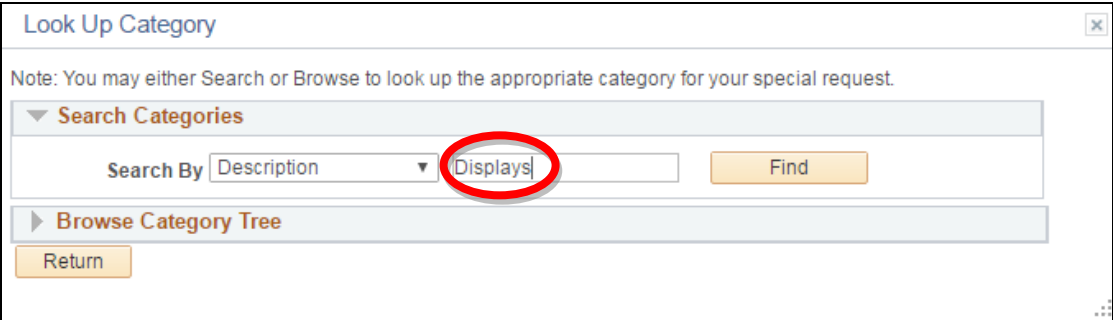
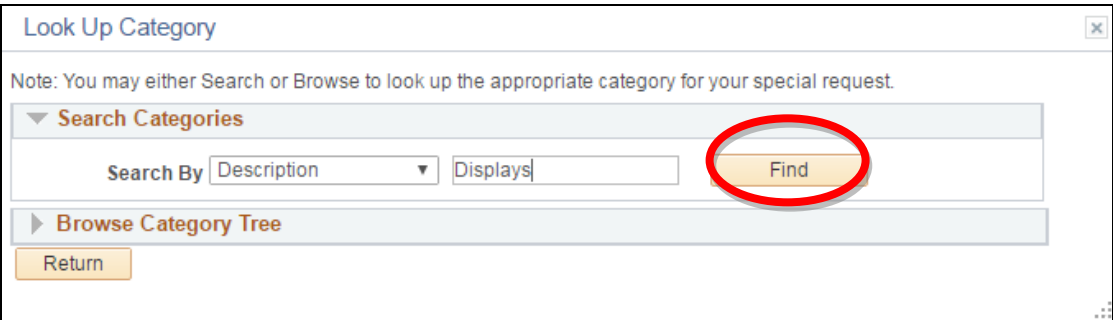
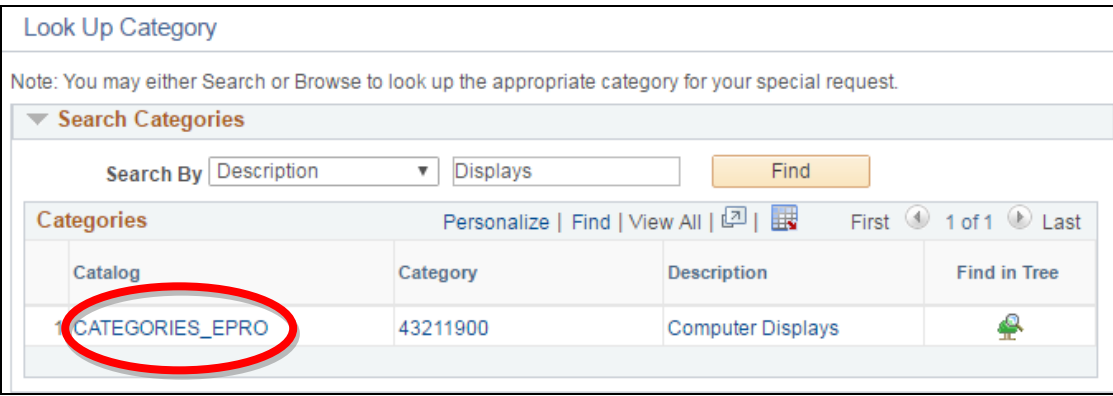


Step	Action
5.	Press the Tab key on your keyboard to populate the Supplier Location based on the Supplier you selected.  Note: To search for an alternate vendor, click the lookup icon.
6.	Next, select a Category by clicking the lookup link.  The Category classifies the item you are purchasing according 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.



ADDY NOTES

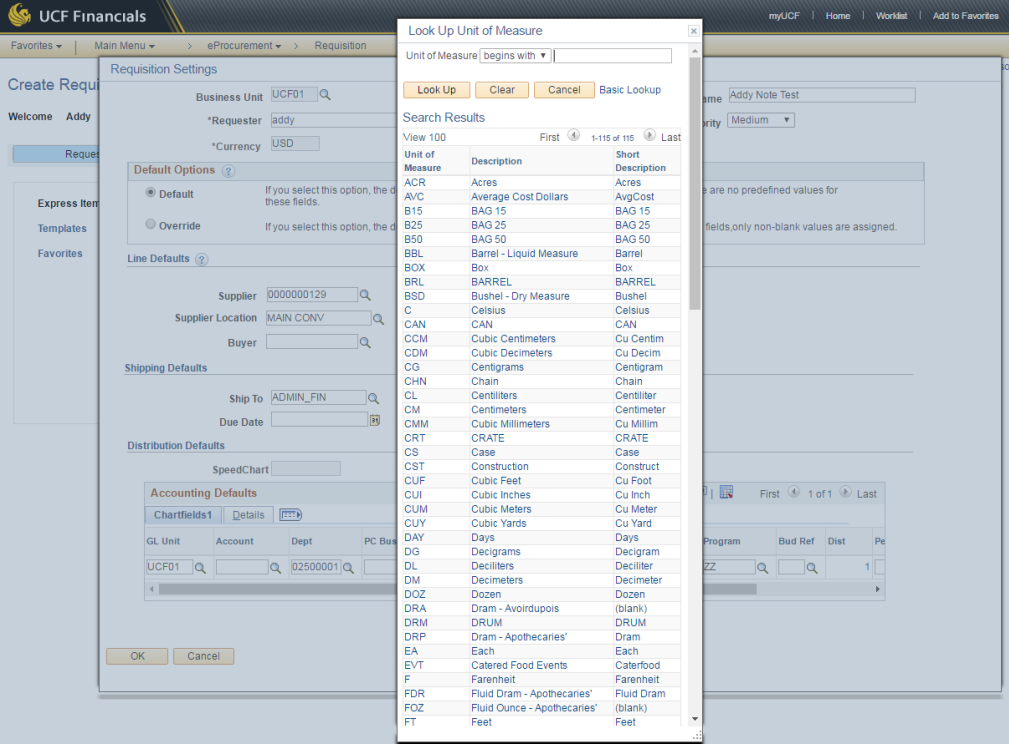


Step	Action
8.	In the Search field, type a descriptive term or portion of a term of the category that applies to the item(s) you are purchasing. For this example, we will search for Displays. 
9.	Click Find. 
10.	Click the link of the Category you want to assign to the requisition. 



ADDY NOTES



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. 



ADDY NOTES



Step Action

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

Unit of Measure	Description	Short Description
ACR	Acres	Acres
AVC	Average Cost Dollars	AvgCost
B15	BAG 15	BAG 15
B25	BAG 25	BAG 25
B50	BAG 50	BAG 50
BBL	Barrel - Liquid Measure	Barrel
BOX	Box	Box
BRL	BARREL	BARREL
BSD	Bushel - Dry Measure	Bushel
C	Celsius	Celsius
CAN	CAN	CAN
CCM	Cubic Centimeters	Cu Centim
CDM	Cubic Decimeters	Cu Decim
CG	Centigrams	Centigram
CHN	Chain	Chain
CL	Centiliters	Centiliter
CM	Centimeters	Centimeter
CMM	Cubic Millimeters	Cu Millim
CRT	CRATE	CRATE
CS	Case	Case
CST	Construction	Construct
CUF	Cubic Feet	Cu Foot
CUI	Cubic Inches	Cu Inch
CUM	Cubic Meters	Cu Meter
CUY	Cubic Yards	Cu Yard
DAY	Days	Days
DG	Decigrams	Decigram
DL	Deciliters	Deciliter
DM	Decimeters	Decimeter
DOZ	Dozen	Dozen
DRA	Dram - Apothecaries'	(blank)
DRM	DRUM	DRUM
EA	Each	Each
EAT	Catered Food Events	Caterfood
F	Fahrenheit	Fahrenheit
FDR	Fluid Dram - Apothecaries'	Fluid Dram
FOZ	Fluid Ounce - Apothecaries'	(blank)
FT	Feet	Feet

Note: The most common Unit of Measure selections include:

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



ADDY NOTES

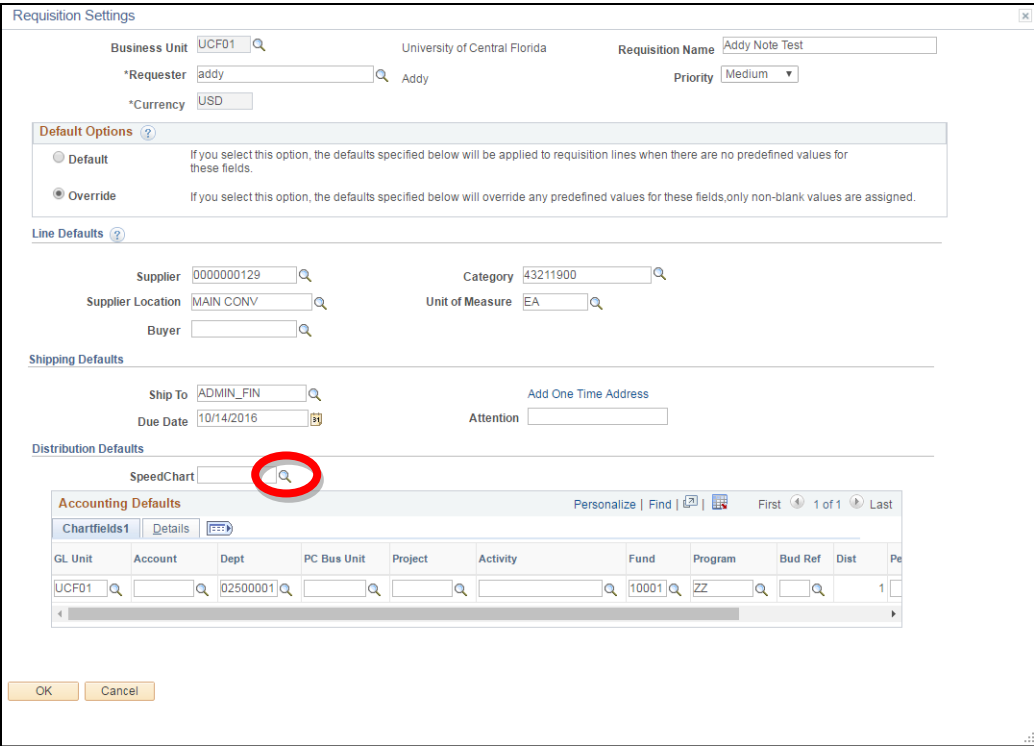
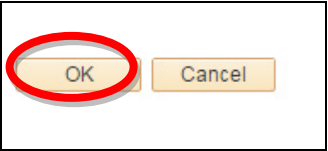


Step	Action
14.	Verify that the default Ship To location is correct. If necessary, enter the correct value. Note: The value in the Ship To field should be the location where you normally receive goods or services. Alternatively, enter a different location value in the Ship To field if one of the following 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.
15.	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.



ADDY NOTES

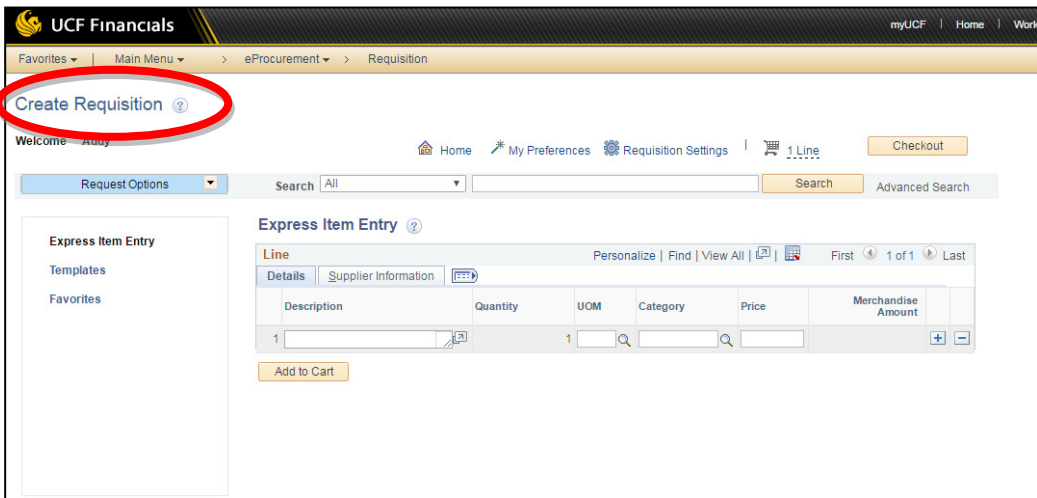
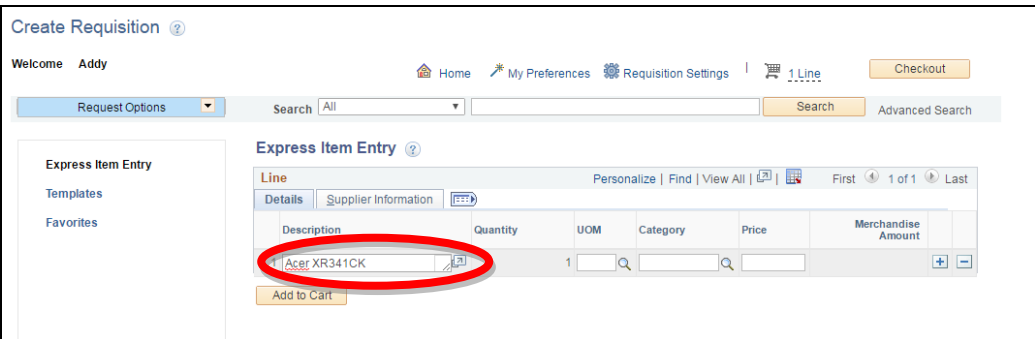


Step	Action
16.	If you need to enter a new SpeedChart value, click the look up icon to find a value. Make sure the Override button is selected in the Default Options section, enter the new SpeedChart (i.e., department or project) number, and then click the tab key on your keyboard to complete the change.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



ADDY NOTES



Step	Action
18.	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. 
19.	Enter a description of your first item in the Description field. 



ADDY NOTES

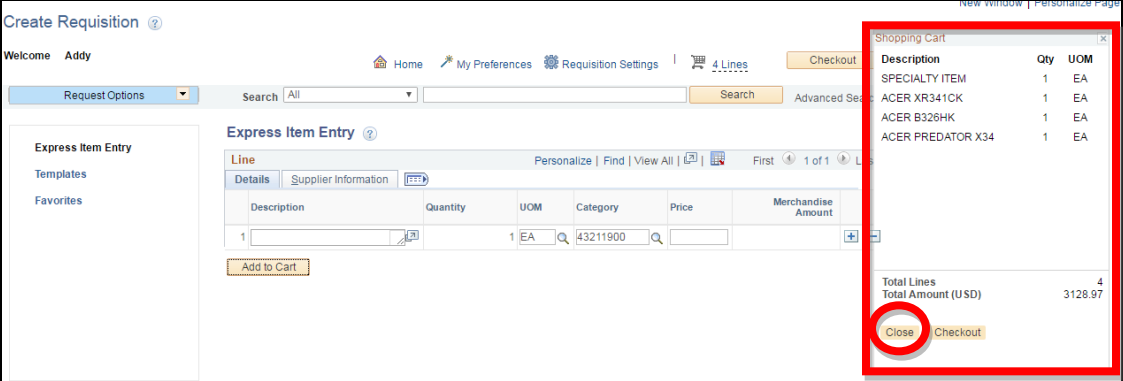
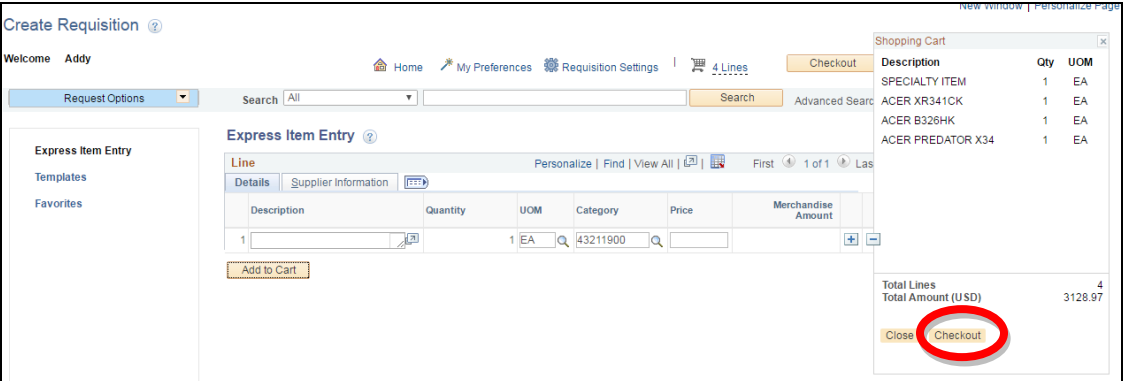


Step	Action
20.	Next, enter a price for your item in the Price field.
	The screenshot shows the 'Create Requisition' interface. On the left is a sidebar with 'Express Item Entry', 'Templates', and 'Favorites'. The main area has a top navigation bar with 'Home', 'My Preferences', 'Requisition Settings', and a shopping cart icon showing '1 Line'. Below this is a search bar and a 'Request Options' dropdown. The 'Express Item Entry' section contains a table with columns: Line, Details, Supplier Information, Description, Quantity, UOM, Category, Price, and Merchandise Amount. The first row shows '1' in the Line column, 'Acer XR341CK' in Description, '1' in Quantity, 'EA' in UOM, and '849.99' in Price. The 'Price' field is circled in red.
21.	To add additional requisition lines, click the Plus (+) sign.
	This screenshot is similar to the previous one, but the plus sign button at the bottom right of the 'Express Item Entry' table is circled in red, indicating where to click to add a new line.
22.	Once you have added all the lines and items necessary, click Add to Cart .
	This screenshot shows the 'Express Item Entry' table with three rows of items: 'Acer XR341CK' (Price: 849.99), 'Acer B326HK' (Price: 937.99), and 'Acer Predator X34' (Price: 1240.99). The 'Add to Cart' button at the bottom left of the table is circled in red.



ADDY NOTES

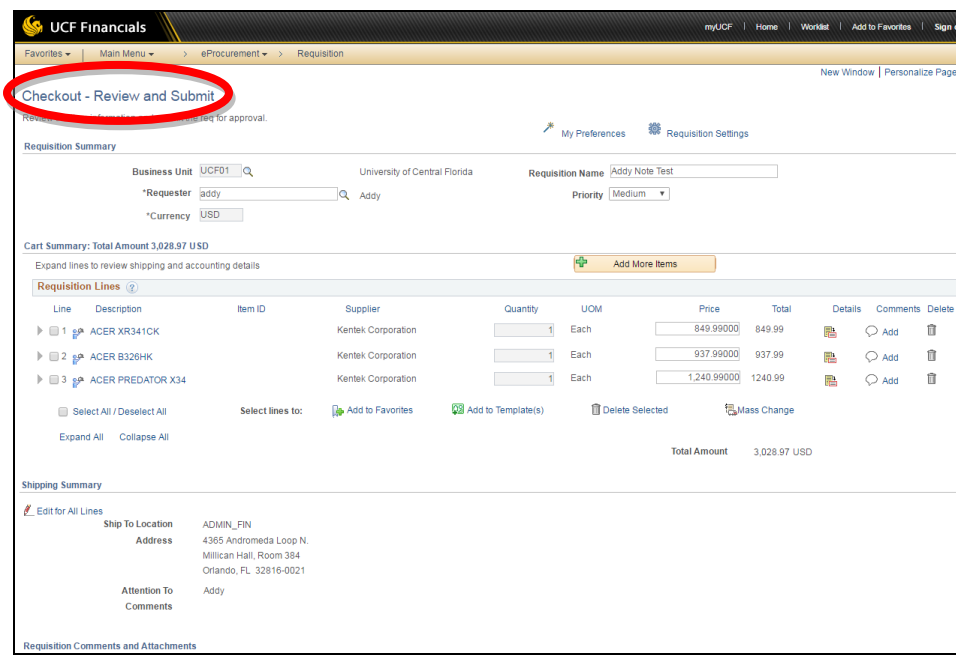
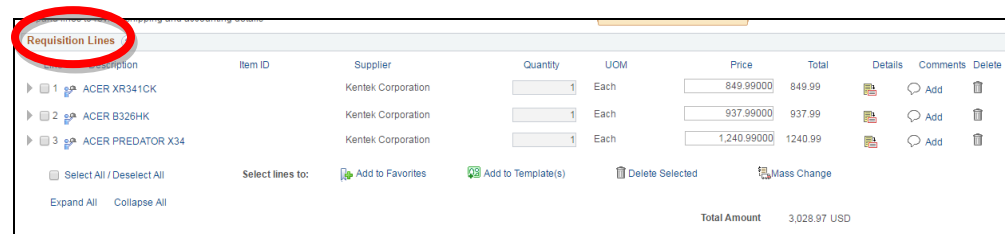


Step	Action
23.	Click the Shopping Cart icon at the top of the page. You can see the lines of your requisition you already entered will display.  Click Close.
24.	When you have finished adding all necessary req lines, click Checkout on either the shopping cart summary or at the top of the Create Requisition page. 



ADDY NOTES

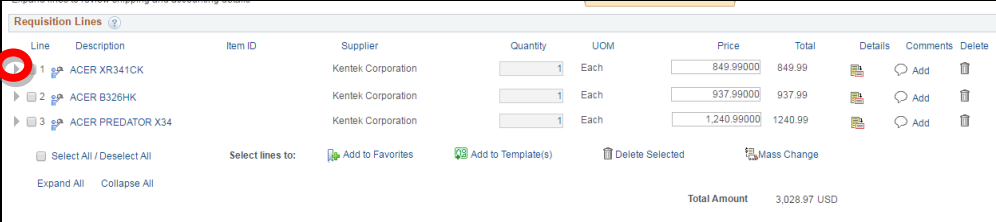
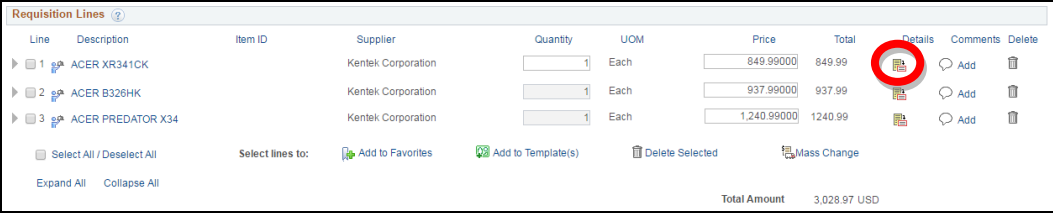
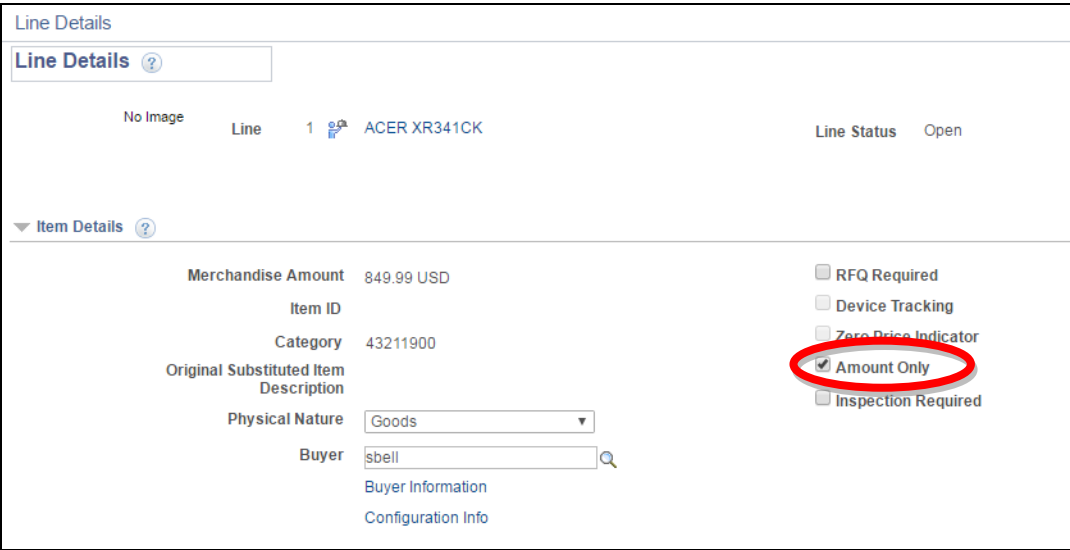


Step	Action
25.	The Checkout – Review and Submit page will display. This page is used to make required adjustments, enter comments, preview approvals, check budget, and save and submit your requisition. 
26.	The Requisition Lines section includes all the lines of the requisition. 



ADDY NOTES



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. 



ADDY NOTES

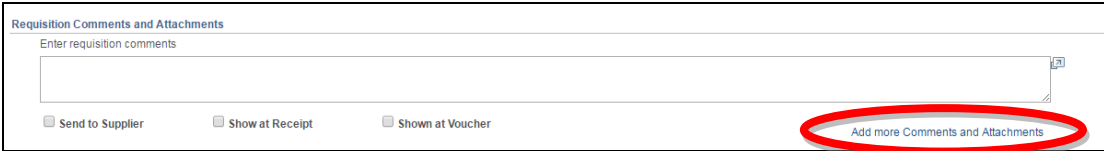
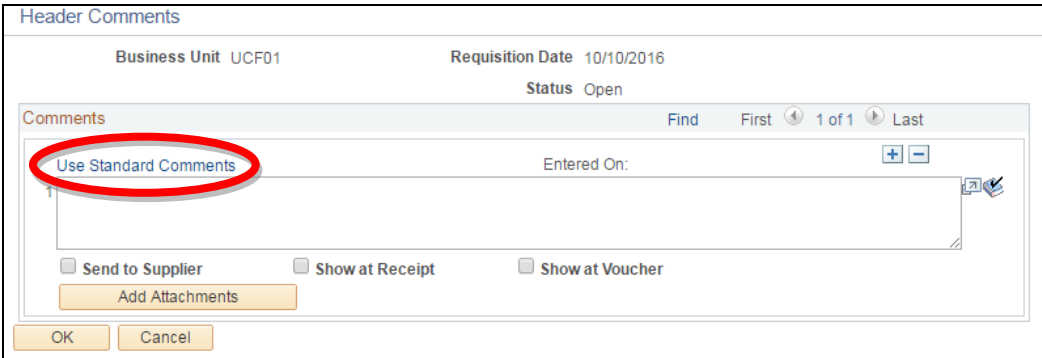
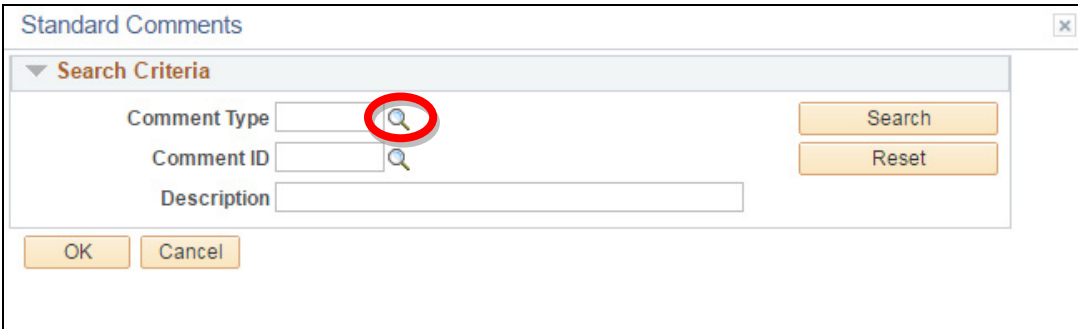


Step	Action
30.	Next, use the arrow to expand the line that you need to adjust to change the quantity.
31.	Under the item, select the arrow to expand the Account Lines section. Select the Distributed By drop-down arrows to change the status from Amt to Qty.
32.	Adjust the amount under the Quantity column for the amount required. Note: Repeat steps 31 and 32 as needed for all lines for which you need to edit the quantity.



ADDY NOTES

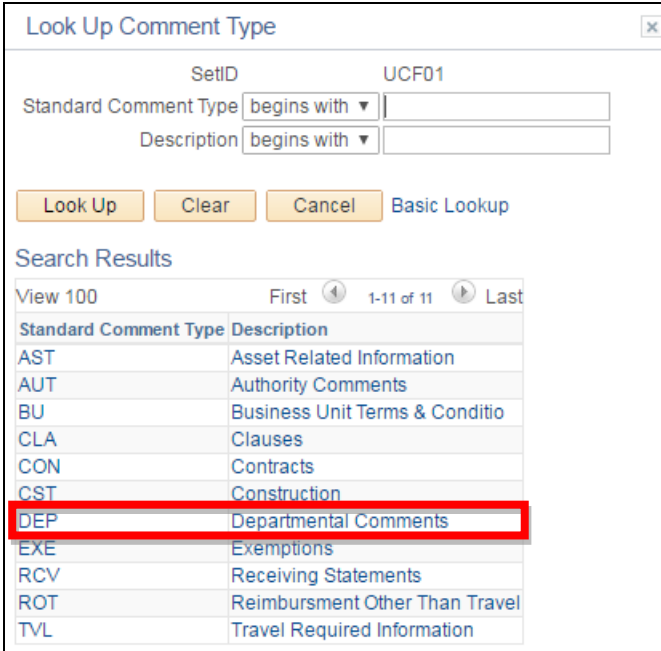
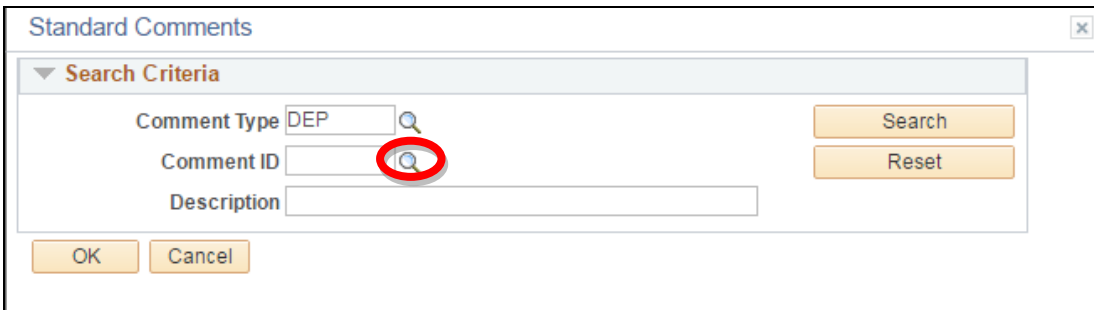


Step	Action
33.	Click Add more Comments and Attachments to add a comment to the requisition. 
34.	The Header Comments pop up window displays. Click the Use Standard Comments link. 
35.	Click the Look up Comment Type icon. 



ADDY NOTES

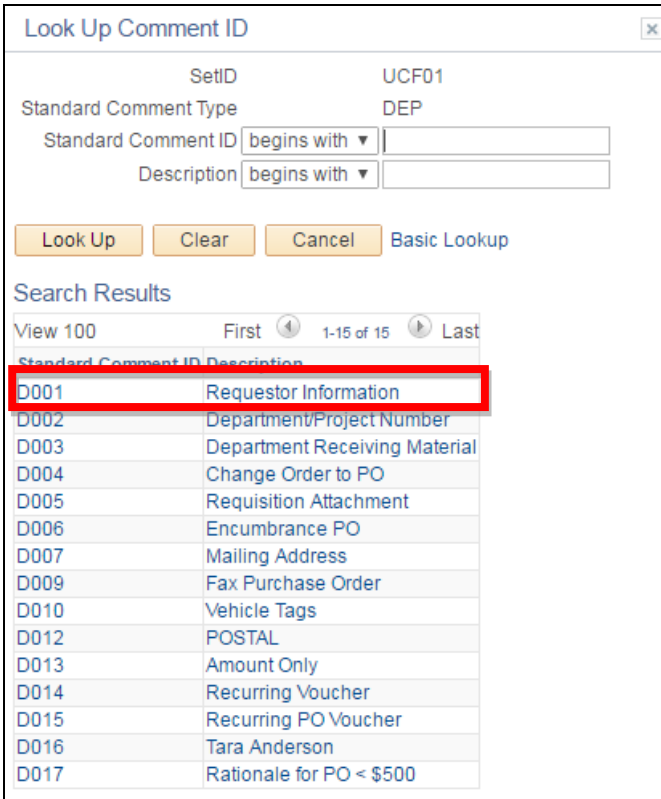
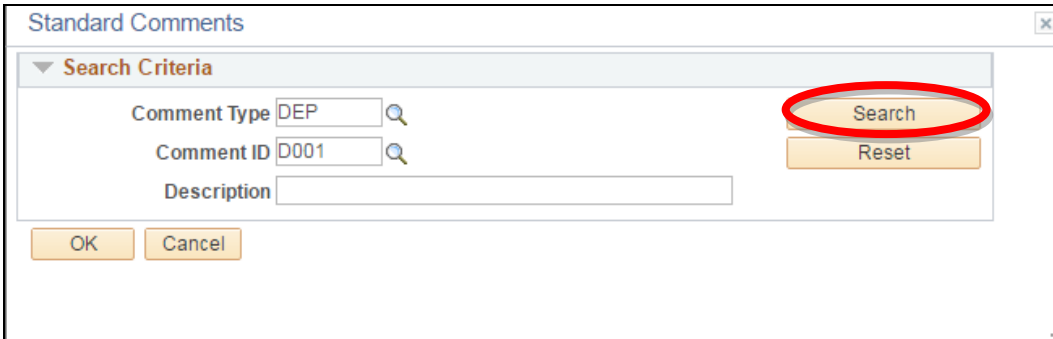


Step	Action
36.	Click the Departmental Comments link. 
37.	Click the Look Up Comment ID icon. 



ADDY NOTES



Step	Action																																
38.	Click the Requestor Information link.  Look Up Comment ID SetID: UCF01 Standard Comment Type: DEP Standard Comment ID: begins with Description: begins with Look Up Clear Cancel Basic Lookup Search Results View 100 First 1-15 of 15 Last <table border="1"> <thead> <tr> <th>Standard Comment ID</th> <th>Description</th> </tr> </thead> <tbody> <tr><td>D001</td><td>Requestor Information</td></tr> <tr><td>D002</td><td>Department/Project Number</td></tr> <tr><td>D003</td><td>Department Receiving Material</td></tr> <tr><td>D004</td><td>Change Order to PO</td></tr> <tr><td>D005</td><td>Requisition Attachment</td></tr> <tr><td>D006</td><td>Encumbrance PO</td></tr> <tr><td>D007</td><td>Mailing Address</td></tr> <tr><td>D009</td><td>Fax Purchase Order</td></tr> <tr><td>D010</td><td>Vehicle Tags</td></tr> <tr><td>D012</td><td>POSTAL</td></tr> <tr><td>D013</td><td>Amount Only</td></tr> <tr><td>D014</td><td>Recurring Voucher</td></tr> <tr><td>D015</td><td>Recurring PO Voucher</td></tr> <tr><td>D016</td><td>Tara Anderson</td></tr> <tr><td>D017</td><td>Rationale for PO < \$500</td></tr> </tbody> </table>	Standard Comment ID	Description	D001	Requestor Information	D002	Department/Project Number	D003	Department Receiving Material	D004	Change Order to PO	D005	Requisition Attachment	D006	Encumbrance PO	D007	Mailing Address	D009	Fax Purchase Order	D010	Vehicle Tags	D012	POSTAL	D013	Amount Only	D014	Recurring Voucher	D015	Recurring PO Voucher	D016	Tara Anderson	D017	Rationale for PO < \$500
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D006	Encumbrance PO																																
D007	Mailing Address																																
D009	Fax Purchase Order																																
D010	Vehicle Tags																																
D012	POSTAL																																
D013	Amount Only																																
D014	Recurring Voucher																																
D015	Recurring PO Voucher																																
D016	Tara Anderson																																
D017	Rationale for PO < \$500																																
39.	Click Search.  Standard Comments Search Criteria Comment Type: DEP Comment ID: D001 Description: Search Reset OK Cancel																																



ADDY NOTES



Step	Action
40.	Click the Select checkbox to add the comment to the comment field. Standard Comments ▼ Search Criteria Comment Type DEP Comment ID D001 Description Search Reset ▼ Standard Comments Find First 1 of 1 Last Select Comment Type DEP Comment ID D001 Description Requestor Information ☒ Name of requestor: Phone Number: Building & Room No.: Dept. Name: FAX No: ☐ Append To Comments ☒ Override Comments OK Cancel

Note: Your approver may require you to add a comment and any attachments on Line 1 of the requisition as well.



ADDY NOTES

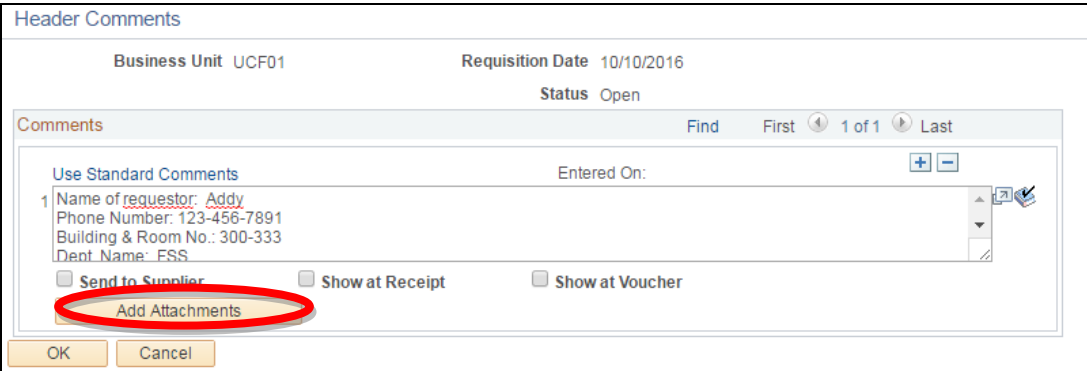
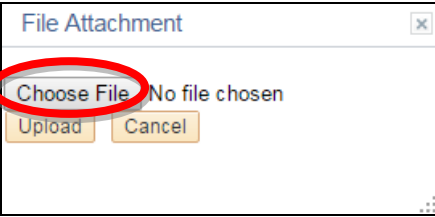
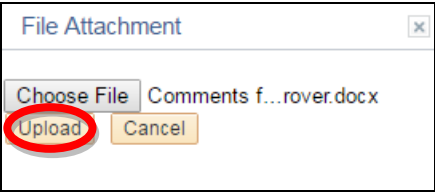


Step	Action
41.	Click OK.
42.	Click in the field to complete the comment with your personalized information.



ADDY NOTES

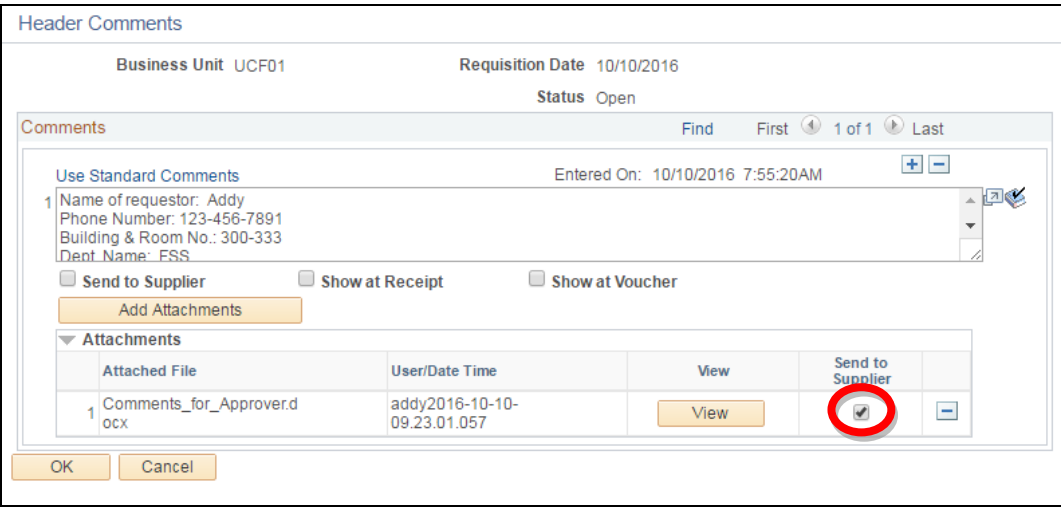
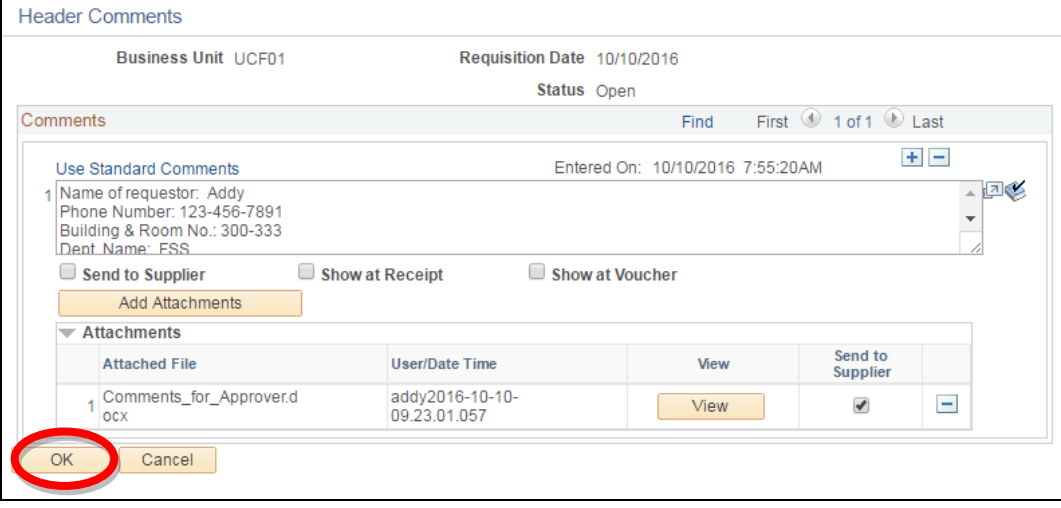


Step	Action
43.	Next, add a quote for your approver to review. Click Add Attachments. 
44.	Click Choose File to search your computer for a file. 
45.	Click Upload. 



ADDY NOTES



Step	Action
46.	If you want the supplier to see the attachment, click the Send to Supplier checkbox.  The screenshot shows the 'Header Comments' window for Business Unit UCF01 and Requisition Date 10/10/2016. The status is 'Open'. Under the 'Comments' section, there is a list of comments. The first comment is selected, and the 'Send to Supplier' checkbox is checked and circled in red. Other options like 'Show at Receipt' and 'Show at Voucher' are also visible. At the bottom, there are 'OK' and 'Cancel' buttons.
47.	Click OK.  The screenshot shows the same 'Header Comments' window. The 'Send to Supplier' checkbox is still checked. The 'OK' button at the bottom left is circled in red, indicating the next step is to click it.



ADDY NOTES

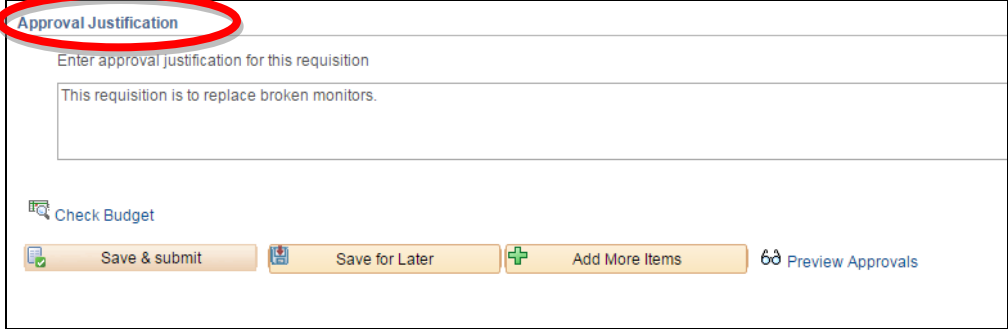
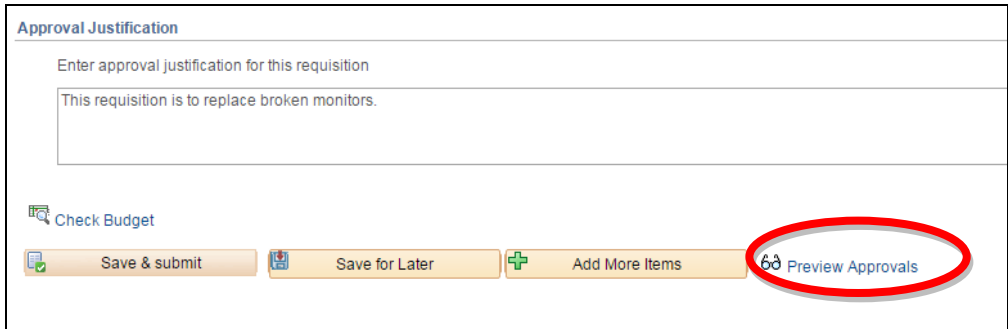


Step	Action
48.	Click the Sent to Supplier checkbox if you want the comment to print on the purchase order for the supplier to review. 
49.	Click the Show at Receipt checkbox if you want the person or department performing the receiving to view the comment. 
50.	Click the Shown at Voucher checkbox if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



ADDY NOTES



Step	Action
51.	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.
52.	Next, preview the approval process. Click the Preview Approvals link. 



ADDY NOTES



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. Message Requisition has to be saved first to preview approvals. (18036,12239) Select OK to save the requisition in Open status and view the approval monitor. If you select Cancel the requisition will not be saved. OK Cancel



ADDY NOTES

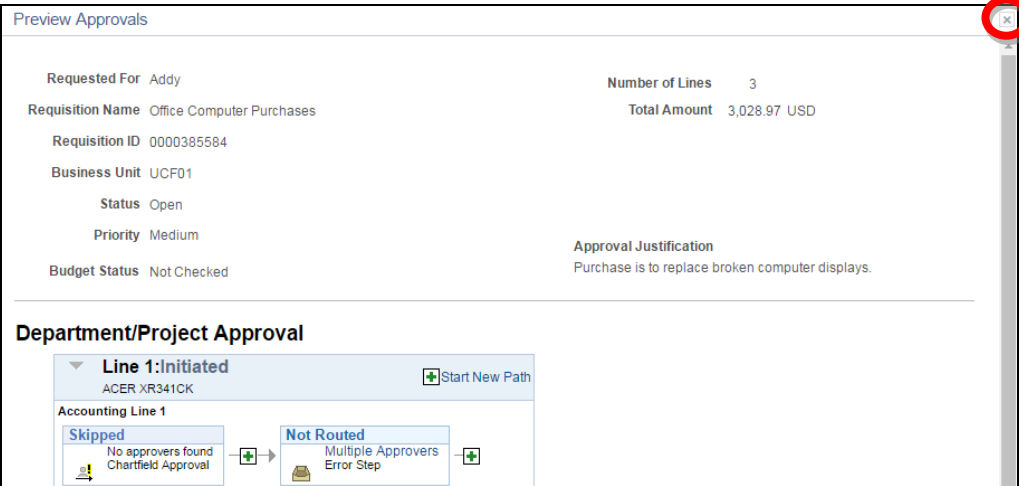
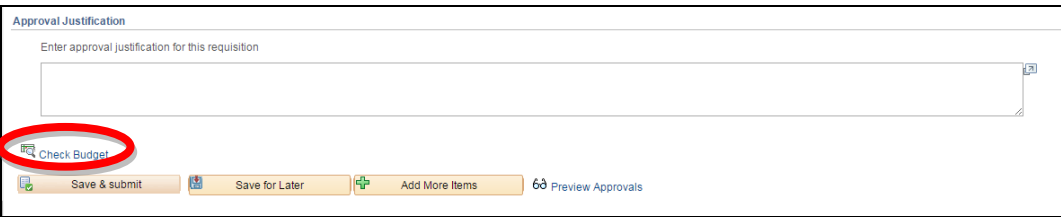
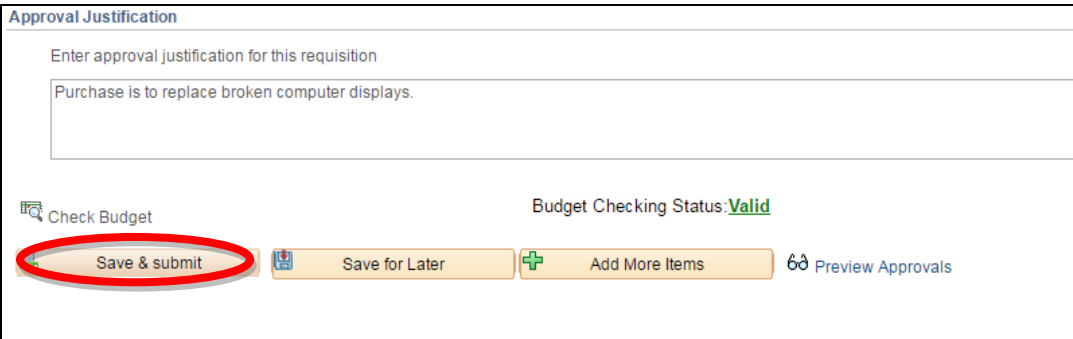


Step	Action
54.	The Preview Approvals pop up window displays. Preview Approvals Requested For Addy Number of Lines 3 Requisition Name Office Computer Purchases Total Amount 3,028.97 USD Requisition ID 0000385584 Business Unit UCF01 Status Open Priority Medium Approval Justification Purchase is to replace broken computer displays. Budget Status Not Checked Department/Project Approval Line 1:Initiated ACER XR341CK Start New Path Accounting Line 1 Skipped No approvers found Chartfield Approval Not Routed Multiple Approvers Error Step Line 2:Initiated ACER B326HK Start New Path Accounting Line 1 Skipped No approvers found Chartfield Approval Not Routed Multiple Approvers Error Step Line 3:Initiated ACER PREDATOR X34 Start New Path Accounting Line 1 Skipped No approvers found Chartfield Approval Not Routed Multiple Approvers Error Step Buyer Approval Before Sourcing Line 1:Initiated ACER XR341CK Start New Path PO Buyer Approve Before Source Not Routed Multiple Approvers Purchasing Buyer Approval



ADDY NOTES



Step	Action
55.	Click Close or x to return to the Checkout-Review and Submit screen.  The screenshot shows the 'Preview Approvals' screen with the following details: - Requested For: Addy - Requisition Name: Office Computer Purchases - Requisition ID: 0000385584 - Business Unit: UCF01 - Status: Open - Priority: Medium - Budget Status: Not Checked - Number of Lines: 3 - Total Amount: 3,028.97 USD - Approval Justification: Purchase is to replace broken computer displays. - Department/Project Approval: Line 1: Initiated (ACER XR341CK) - Accounting Line 1: Skipped (No approvers found Chartfield Approval) and Not Routed (Multiple Approvers Error Step).
56.	Click the Check Budget link to validate the budget for this requisition.  The screenshot shows the 'Approval Justification' screen with a text area for justification and buttons for 'Check Budget', 'Save & submit', 'Save for Later', and 'Add More Items'.
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.  The screenshot shows the 'Approval Justification' screen with the justification text 'Purchase is to replace broken computer displays.' and the 'Budget Checking Status' displayed as 'Valid'. The 'Save & submit' button is highlighted with a red circle.

