

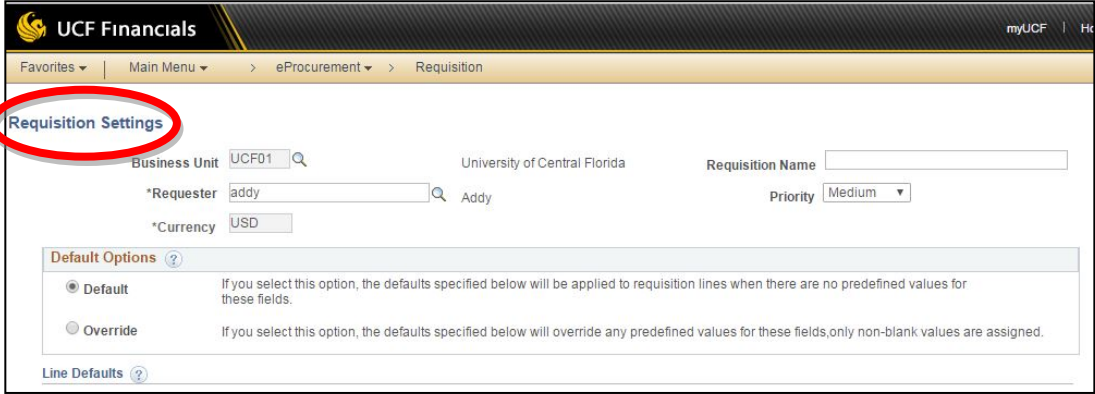
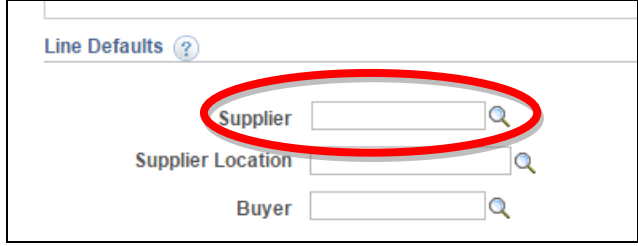


ADDY TIPS



Using the Mass Change Page When Creating a Requisition

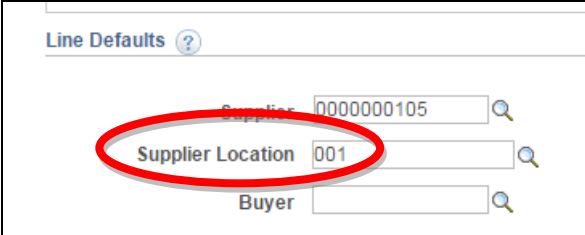
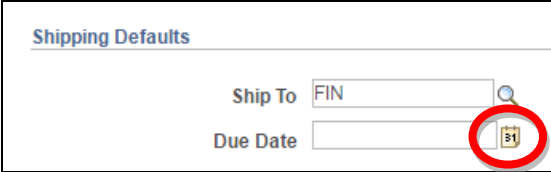

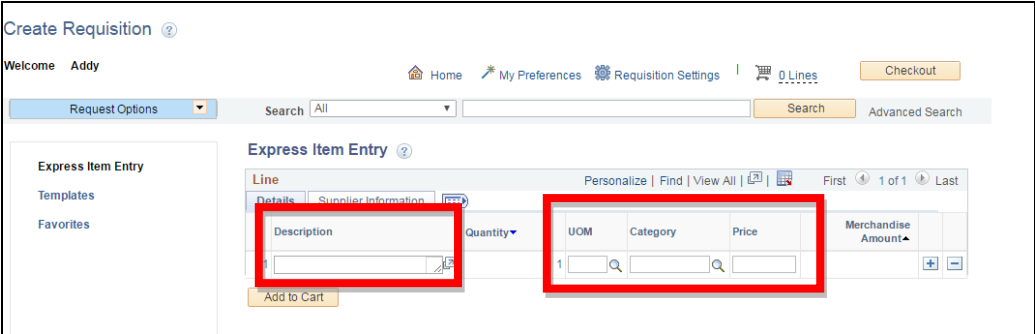
If you want to use the Modify Lines/Shipping/Accounting page to help create your requisition, please observe the guidelines discussed in this Addy Tip. They will help streamline the requisition creation process for you. If you need to review any of the specific requisition creation steps, please refer to the Addy Note [Creating a Requisition](#).

Step	Action
1.	<p>Navigate to: Main Menu > eProcurement > Requisition.</p> 
2.	<p>In the Lines Defaults section, enter the supplier in the Supplier field, or use the lookup icon if necessary.</p> 



ADDY TIPS


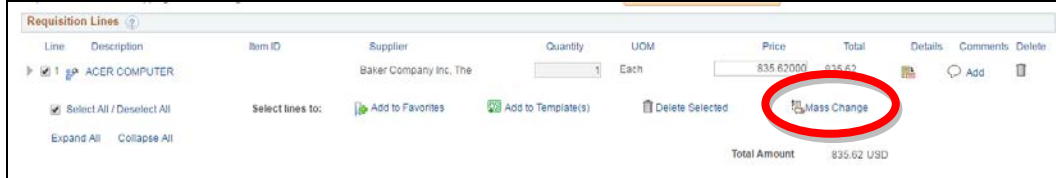


Step	Action
3.	<p>Press the Tab key on your keyboard to populate the Supplier Location field.</p> 
4.	<p>Click the Due Date calendar icon to select the date you expect to receive the item.</p> 
5.	<p>Click OK.</p> 
6.	<p>On the Create Requisition page, add an Item Description, Price, Category and unit of measurement (UOM). The requisitions default to amount rather than quantity. The Quantity field defaults to 1.0000, and the UOM is usually each (EA). You may still create a requisition by quantity. For additional guidance please refer to the Addy Note Creating a Requisition.</p> 



ADDY TIPS



Step	Action
7.	Click the plus (+) sign to add a line to your requisition. 
8.	Click Add to Cart , then click Checkout .
9.	On the Checkout – Review and Submit page, select the lines you want to make a change on then click the Mass Change link. 



ADDY TIPS



Step	Action																
<p>10.</p>	<p>Enter data in any fields on the Edit Lines/Shipping/Accounting for Selected Lines page that need to be changed on all lines</p> <div data-bbox="305 611 1295 1409" style="border: 1px solid black; padding: 5px;"> <p style="text-align: right; margin-bottom: 0;">Edit Lines/Shipping/Accounting for Selected Lines x</p> <p>Line Information ?</p> <p><small>Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.</small></p> <p>Supplier ID <input type="text"/> Q Supplier Location <input type="text"/> Q</p> <p>Buyer <input type="text"/> Q Category <input type="text"/> Q</p> <hr/> <p>Shipping Information</p> <p>Ship To Location <input type="text"/> Q Add One Time Address</p> <p>Due Date <input type="text"/> B Attention <input type="text"/></p> <p>Comments <div style="border: 1px solid gray; height: 40px; width: 100%;"></div></p> <hr/> <p>Accounting Lines</p> <p>SpeedChart <input type="text"/> Q</p> <p><small>Please enter GL Business Unit before selecting other chartfield values</small></p> <div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: right; margin-bottom: 0;">Accounting Information Personalize Find First 1 of 1 Last</p> <p>Chartfields1 Details Asset Information E</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <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>Proj</th> </tr> </thead> <tbody> <tr> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> <td><input type="text"/> Q</td> </tr> </tbody> </table> </div> <p style="text-align: right; margin-top: 5px;">Load Values from Defaults</p> <p style="margin-top: 5px;">OK Cancel</p> </div> <p>For example, if you need to enter a different Ship To code or change the ChartFields for all lines, enter the appropriate information on this page.</p> <p>Note: <i>Do not</i> click the Load Values from Defaults link. Clicking this link will cause invalid data to populate in your requisition.</p>	GL Unit	Account	Dept	PC Bus Unit	Project	Activity	Fund	Proj	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q	<input type="text"/> Q
GL Unit	Account	Dept	PC Bus Unit	Project	Activity	Fund	Proj										
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<p>11.</p>	<p>Click OK.</p> <div data-bbox="305 1709 695 1843" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;"> OK Cancel </p> </div>																



ADDY TIPS



Step	Action
12.	<p>A message will appear, asking if you would like to make these changes to the requisition. Click OK.</p> <div data-bbox="310 611 1118 816" style="border: 1px solid black; padding: 5px;"> <p>Message</p> <p>Retrofit field changes to the selected existing requisition lines/schedules. (10150,296)</p> <p>OK Cancel</p> </div>
13.	<p>Click the Expand All link and verify that your changes applied to all distribution lines.</p> <div data-bbox="310 900 789 1094" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Select All / Deselect All</p> <p>Expand All Collapse All</p> </div>
14.	<p>Make changes to Chartfields and the Distribute By field, if necessary.</p>
15.	<p>Add the appropriate standard header or line comments.</p>
16.	<p>Click Preview Approvals.</p> <div data-bbox="310 1304 1411 1478" style="border: 1px solid black; padding: 5px;"> <p>Check Budget</p> <p>Save & submit Save for Later Add More Items Preview Approvals</p> </div>



ADDY TIPS

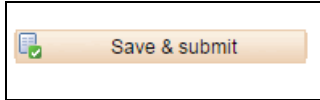


Step	Action
17.	<p>The Preview Approvals page displays with the requisition number that UCF Financials assigned to the Requisition.</p> <div data-bbox="310 611 808 1024" style="border: 1px solid black; padding: 5px;"> <p>Preview Approvals</p> <p>Requested For Addy</p> <p>Requisition Name 0000385656</p> <p>Requisition ID 0000385656</p> <p>Business Unit UCF01</p> <p>Status Open</p> <p>Priority Medium</p> <p>Budget Status Not Checked</p> </div>
18.	<p>Click Return.</p> <div data-bbox="310 1108 906 1283" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Pending Buyer Approval</p> <p style="text-align: center;"> Return Apply Approval Changes </p> </div>
19.	<p>Click the Check Budget link.</p> <div data-bbox="310 1367 1411 1541" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> Check Budget Save & submit Save for Later + Add More Items Preview Approvals </p> </div>
20.	<p>Verify that the Budget Status is Valid.</p> <div data-bbox="310 1631 1401 1806" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> Check Budget Save & submit Save for Later + Add More Items Preview Approvals </p> <p style="text-align: right; margin-top: 10px;"> Budget Checking Status: Valid </p> </div>



ADDY TIPS



Step	Action
21.	Click the Save and Submit button 
22.	The requisition is now entered into workflow – having gone from Initiated to Pending status. 