ePro Vendor Catalog

VERSION: 10/31/2014
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1 Overview

In this chapter, you will learn:

- When to create a vendor catalog requisition
- How the vendor catalog purchasing process works at high level
About Vendor Catalog Orders

Overview

When a departmental ePro requester needs to place an order for goods or services from a vendor listed in the vendor catalog, they create a vendor catalog order. These vendors extend special pricing and offers to UNC-Chapel Hill. Vendor catalog orders may not exceed $5,000.00.

The departmental ePro requester punches out to the vendor’s website, adds items to the shopping cart, and submits them back to ePro.

The system pulls the information from the vendor’s website into ePro. The departmental ePro requester makes any necessary additions or changes, then saves and submits the order.

If the department requires approvals, the system initiates the workflow process by routing the document to the first approval level. Otherwise, the system sends the order to the vendor when the next batch process job runs, which happens every hour of the workday.

![Workflow Diagram]

**Departmental ePro Requester**

Navigate to the ePro page and punch out to the vendor’s website

Add items to the shopping cart and submit them back to ePro

Perform additional edits or add detail in ePro prior to submitting, if necessary
- Enter comments
- Change the default chartfield information
- Modify shipping information

Save and submit the order
- If the department does not require approval, the order goes directly to the vendor
- If rejected, sending it back to the creator

**Departmental Approver**

Review the order and take appropriate action
- Approve order, sending it to the vendor
- Reject order, sending it back to the creator

If Rejected
2 Create Requisition Page

In this chapter, you will learn how to use the Create Requisition page to:

- Shop a vendor's website
- Add comments
- Enter or modify chartfield information
- Enter or modify shipping information
- Check budget
- Submit for approval
Creating a Vendor Catalog Order

Overview

Departmental ePro requesters use the Vendor Catalog tab to order supplies or repairs from any vendor listed in the vendor catalog when the total does not exceed $5,000.00. These vendors extend special pricing and offers to UNC-Chapel Hill.

Vendor catalog purchases cannot exceed $5,000.00. If you need to make a purchase from a vendor listed in the catalog for an amount that exceeds $5,000.00, create a purchase requisition instead.

Related Reference

For information on creating a new purchase requisition, see Creating a New Purchase Requisition, page 1.

For information on canceling, copying, printing, editing, or finding an existing vendor catalog order, see Managing a Requisition, page 26.

Menu Path

Main Menu > Finance Menu > eProcurement > Create Requisition

Steps - Creating a Vendor Catalog Order

Follow these steps to create a vendor catalog order:

1. Choose this menu option:
   
   Main Menu > Finance Menu > eProcurement > Create Requisition
   
   Result: If you haven’t set up your required default values, the system displays the Requester Setup page. If you have already entered these default values, skip step 2.

2. If prompted, you must enter some default values on this page before you can create a purchase requisition. Refer to steps 4 and 5 of the Working With Requester Preferences, page 40 instructions for more information.
Note: If you are already on the Create Requisition page, you can get to the Procurement Services page by navigating to the Add Items and Services tab and clicking on the Vendor Catalog tab.
3. Ensure that the Vendor Catalog tab is selected.

4. Click the link for the vendor you want to order from.

Result: The system punches out to the vendor's catalog page. This page is outside of the UNC-Chapel Hill system, but you remain within the eProcurement vendor catalog process.
5. Order one or more products from the vendor.

   Note: Minimum order amounts vary by vendor. The vendor’s website will display an error message if your order is below the vendor’s minimum amount.

6. Submit the order from the vendor’s catalog to ePro.

   Note: Each vendor’s catalog is different and the label on the button to submit your order may vary.

   Result: The system displays the Review and Submit tab with the information you selected from the catalog.

**Review and Submit Tab**

1. Perform additional edits or add detail to your requisition prior to saving it by completing any or all of the following optional steps:
   - *Name the Vendor Catalog Order, page 11*
   - *Attach documents to the Vendor Catalog Order, page 11*
2. When you have finished editing your vendor catalog order, or if you don’t need to edit or add comments to your order, click the Check Budget button. If you receive an error message you will need to select a new chartfield string or wait until funds have been added to that string.

Result: The system checks to see if enough budget is available on the chartfield string to cover the purchase amount. If there enough budget, the system doesn’t display an error message. If the system displays an error message, work with your business manager to move budget to the chartfield string or to use different chartfield values.

3. Do one of the following:
   - If you want to save the requisition to work on later, click the Save and Preview approvals button. When you are ready to finish the requisition, refer to the Managing a Requisition, page 26 for information about finding and completing it.
   - If you are ready to submit the requisition, click the Save & submit button.

Caution: You must check the budget before you click the Save & submit button.
The system kicks off the workflow process by routing the document to the first approval level.

**Name the Vendor Catalog Order**

1. If you want the ability to search for and locate this order by name in the future, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Name</td>
<td>Enter a name to help you identify the vendor catalog requisition later.</td>
</tr>
</tbody>
</table>

**Attach documents to the Vendor Catalog Order**

1. If you want to attach a document, click the **Attachments** link.
Result: The system displays the Attachments page.

2. Click the **Add Attachment** button.

Result: The system displays the File Attachment box.

3. Click the **Browse** button.

4. Choose the file you want to attach by finding the file on a local or network computer drive, and double-clicking on the file name.

5. Click the **Upload** button.
Result: They system displays the attached file's name and Attachment Id.

6. To view the attachment and verify that it was uploaded correctly, click the **View** button. Otherwise, skip this step.

Result: The file opens in a new window.

7. Close the window displaying the image.

   **Note:** To delete an attached file, click the **Minus** button to the right of the row, and then click **OK** to confirm that you want to delete the attachment.
8. To attach more files, repeat steps 1 through 6. When you are finished attaching documents, click **OK**.

Result: The system returns you to the Review and Submit tab.

**Enter Line Comments for the Vendor Catalog Order**

You can add comments to any or every line on your vendor catalog order. These comments are visible to departmental approvers and anyone that opens the document from the Manage Requisitions page. Line comments are not sent to vendors.

1. Click the **Comment** icon to the right of the line item you want to comment on.

Result: The system displays the Line Comments page.

2. Enter the line level comment and mark the checkboxes to indicate where you want the comment to be visible. You can mark as many checkboxes as necessary.
In this field:  Do the following:

| Send to Vendor | This field is not used at UNC-Chapel Hill for line items for vendor catalog orders. Caution: Call the vendor or sales representative if you have special instructions to communicate to the vendor. |
| Show at Receipt | Mark this checkbox if you want the comment to appear on the receipt documentation. |
| Show at Voucher | Mark this checkbox if you want the comment to appear on the voucher. |

3. Click **OK**.

Result: The system returns you to the Review and Submit tab.

**Change the Default Information for a Line of the Vendor Catalog Order**

The requisition line section displays information about each requisition line. The information defaults in from your requester setup information, but you may need to make a change. For example, you may want one specific line shipped to a different location than the other lines.

1. To change the requisition information for any line, click the arrow to the left of the line you would like to change and complete any or all of the following fields:
<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>This field is not used for vendor catalog orders at UNC-Chapel Hill.</td>
</tr>
</tbody>
</table>
| Ship To       | Enter the Ship To location or follow the steps below to search for the appropriate Ship To location:  
                      a. Click the **Lookup** (magnifying glass) icon.  
                      Result: The system displays the first 300 Ship To addresses.  
                      b. In the Description field, change “begins with” to “contains”. Type a word or two to describe your location and click **Look Up**.  
                      c. Click the link for the Ship To location you need.  
                      Result: The system will send this line to the selected location. |
| Attention     | Enter the name of the person to whose attention the shipment will be sent.  
                      Note: If you work in Auxiliary Services, enter the shop, job, and phase code here, if applicable. |
| Location      | Enter the location you are ordering from. |
| Quantity      | Do not change the quantity.  
                      Note: If you accidentally selected the wrong quantity on the vendor's website, you will need to cancel the order and create a new vendor catalog order. |

To modify chartfield information, click the **Chartfields2** tab.
Result: The system displays any default chartfields from the Requester Setup page. The account number defaults in based on the item ordered.

3. Enter new chartfields or modify the default chartfields, if necessary.

Note: For information about chartfields, refer to the Chartfield Structure quick reference card.

**Split Fund a Line of the Vendor Catalog Order**

1. To use multiple chartfield strings on any line, click the down arrow to the left of the line you would like to split fund.

2. Click the + icon.

Result: The system displays a second line.
3. Complete the fields, if necessary:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do the following</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute By</td>
<td>Choose the option you want:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Quantity</strong> if you want to split the funding by quantity.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Amt</strong> if you want to split the funding by amount.</td>
</tr>
<tr>
<td>Liquidate By</td>
<td>Choose the option you want in the event that you end up recapturing some or all of the money:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Quantity</strong> if you want to liquidate by quantity.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Amt</strong> if you want to liquidate by amount.</td>
</tr>
<tr>
<td>Note:</td>
<td>If you chose to distribute by amount, you must liquidate by amount. If you chose to distribute by quantity, you can liquidate by amount or quantity.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location you are ordering from.</td>
</tr>
<tr>
<td>Quantity</td>
<td>If you chose to distribute by Quantity, enter the quantity for each line. If you chose to distribute by Amt, the system doesn't display this box.</td>
</tr>
<tr>
<td>Percent</td>
<td>If you chose to distribute by Amt, enter the percentage to assign to each line. If you chose to distribute by Quantity, leave this field blank.</td>
</tr>
</tbody>
</table>
4. To enter chartfield strings, click the Chartfields2 tab.

Result: The system displays any default chartfields from the Requester Setup page. The account number defaults in based on the item ordered.

5. Enter as many chartfield strings as necessary.

Note: For information about chartfields, refer to the Chartfield Structure quick reference card.
Modifying Line, Shipping, or Chartfield Information and Applying it to the Entire Requisition

If you want to make the same change to every line item, use the **Modify Line/Shipping/Accounting** button to do so. Use this option to modify any of the following:

- shipping information
- chartfields

1. In the Requisition Lines section of the Review and Submit tab, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All / Deselect All</td>
<td>Mark the checkbox.</td>
</tr>
</tbody>
</table>

2. Click the **Modify Line/Shipping/Accounting** button.

Result: The system displays the Modify Line / Shipping / Accounting page.

3. All fields will come in blank, even if they have values associated with them. Enter new information in any field. Leaving a field blank will not affect the original value of that field. Remember that the information you enter affects every line item on this requisition. Do not change any of the Vendor or Category codes at the top, because they are determined by the vendor that you used and the items you ordered. Do not enter anything in the buyer field for vendor catalog orders.

   Note: For information about chartfields, refer to the Chartfield Structure quick reference card.

4. Click the **Apply** button.
5. Choose the appropriate option:

<table>
<thead>
<tr>
<th>In this field</th>
<th>Do the following</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Distribution Lines</td>
<td>Mark this checkbox to apply changes to all distribution lines.</td>
</tr>
<tr>
<td>Matching Distribution Lines</td>
<td>Mark this checkbox to apply changes to each existing distribution line by</td>
</tr>
<tr>
<td></td>
<td>matching the distribution line numbers.</td>
</tr>
<tr>
<td>Replace Distribution Lines</td>
<td>Mark this checkbox to remove the existing distribution lines and replace them</td>
</tr>
<tr>
<td></td>
<td>with distribution line changes.</td>
</tr>
</tbody>
</table>

6. Click **OK**.
Result: The system changes to the requisition header information and displays the Review and Submit tab

Deleting Lines from the Vendor Catalog Order

If you determine that you need to remove one or more lines from your order, you can delete them before saving and submitting your order.

1. Mark the checkbox in the row that you want to delete.

2. Click the Delete button.
3. When prompted, click the Yes button to confirm that you want to delete the selected lines.

![Message](image)

Are you sure you want to delete the selected line(s)? (18036.2315)

Yes  No

Result: The system removes that line and, if all lines are deleted before the order has been saved, displays the Add Items and Services tab.

Note: If the order has already been saved and you delete every line, the system will display an error message. You must leave at least one line or start a new order from scratch.

**Enter Comments Applicable to the Entire Order**

If you need to, you can enter comments that apply to the entire order, rather than individual lines on the order.

1. Enter general information about the order in the Comments field.

2. Under the Comments field, mark the checkboxes to indicate where you want the comment to be visible. You can mark as many checkboxes as necessary.

<table>
<thead>
<tr>
<th><strong>In this field:</strong></th>
<th><strong>Do the following:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Vendor</td>
<td>Mark this checkbox if you want the comment to appear on the purchase order that is dispatched to the vendor. Caution: Vendors may not read these comments. If you have special instructions, it is best to call the vendor or your sales representative.</td>
</tr>
<tr>
<td>Show at Receipt</td>
<td>Mark this checkbox if you want the comment to appear on the receipt documentation.</td>
</tr>
<tr>
<td>Shown at Voucher</td>
<td>Mark this checkbox if you want the comment to appear on the voucher.</td>
</tr>
<tr>
<td>Approval Justification</td>
<td>Mark this checkbox if you want the comment to appear in the Requisition Approval page.</td>
</tr>
</tbody>
</table>
2 Create Requisition Page
3 Manage Requisitions Page

In this chapter, you will learn how to use the Manage Requisitions page to:

- Search for existing vendor catalog requisitions
- Modify existing vendor catalog requisitions
- View the reason a requisition was denied
Managing a Requisition

Overview

Use the Manage Requisitions page to search for a vendor catalog order or non-vendor catalog requisition that has already been created. Once you have found the requisition you can:

- copy the requisition
- print the requisition
- view the reason the requisition was rejected
- modify the requisition
- cancel the requisition
- view the requisition life cycle

Specific instructions for each of these actions is provided in the sections that follow.

Related Reference

For information on creating a new requisition, see Creating a New Purchase Requisition, page 1

Menu Path

Main Menu > Finance Menu> eProcurement > Manage Requisitions

Steps - Managing a Requisition

Follow these steps to manage a requisition:

1. Choose this menu option:
   
   Main Menu > Finance Menu> eProcurement > Manage Requisitions

   Before you can perform any of the Manage Requisition functions, you must search for and select the requisition you would like to cancel, copy, print, or edit.

2. On the Manage Requisitions page, complete one or more of the fields:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Enter the business unit associated with the requisition you are searching for.</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>If the requisition was given a name, enter the name of the requisition you are searching for.</td>
</tr>
</tbody>
</table>
In this field: | Do the following:
---|---
Requisition ID | Enter the requisition ID of the document you are searching for.
Request Status | Choose the appropriate status from the list box of the requisition you are searching for.
Date From | Use the Date From and Date To fields to search for requisitions created within a specific date range.
Date To | Use the Date From and Date To fields to search for requisitions created within a specific date range.
Requester | Enter the Requester ID of the person listed as the requester on the requisition you are searching for.
Note: The requester is the department contact for the requisition.
Entered By | Enter the ID of the person who entered the requisition you are searching for.
PO ID | Enter the purchase order ID associated with the requisition you are searching for.

3. Click the **Search** button.

Result: The system displays the first 50 results that meet the criteria you specified. If you don’t see the requisition you are searching for within those results, enter more criteria in the search fields and try again.
4. Once you see the requisition you are looking for in your search results, refer to the steps below to copy, print, edit or cancel that requisition.

**Copying a Requisition**

Use the Copy Requisition feature to copy any existing non-vendor catalog requisition instead of creating a new one from scratch. This can be helpful if a new requisition will be similar to one that was already created.

The requisition you are copying can be in any status. When you copy an existing requisition, the system:

- copies the information from the previously created requisition
- assigns a new Req ID to the new requisition
- displays the Review and Submit tab of the Create Requisitions page

You can modify your new, copied requisition before submitting it for approval.

1. Once you find the requisition you want to copy, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td>Chose <strong>Copy Requisition</strong>.</td>
</tr>
</tbody>
</table>

2. Click the **Go** button.

Result: The system copies the requisition and displays the Review and Submit tab of the Create Requisitions page.

3. Make any changes to the requisition, including updating the chartfield information, if necessary.

   **Note:** The attachments are not copied from the original requisition to the new requisition. You will need to attach documentation if the requisition's business rules require it.
4. Click the **Save & preview approvals** button.

5. Click the **Check Budget** button.

6. Click the **Save & submit** button.

---

### Printing a Requisition

Any printed requisition can display one of these levels of detail:

- Detailed chartfield information
- High-level summary information

1. Once you find the requisition you want to print, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td>Choose <strong>View Printable Version</strong>.</td>
</tr>
</tbody>
</table>

2. Click the **Go** button.
3. When the system asks if you want to print distribution details with the requisition, choose one of the following:

- **Yes** to print all of the chartfield information for every line
- **No** to print only a high-level summary of the requisition

Result: The system opens a new window with a printer-friendly report.
4. Use your browser's print functionality to print the requisition.

5. Close the new window your browser opened which displayed the printer-friendly requisition.

**Viewing the Reason a Requisition was Rejected**

Before modifying a requisition that has been rejected, it is helpful to view the comments from the approver to find out why it was rejected.

1. Once you find the rejected requisition, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td>Choose <strong>View Approvals</strong>.</td>
</tr>
</tbody>
</table>

2. Click the Go button.
Result: The system displays the Approval Status page.

3. Click the arrow to the left of Comments and view the comments.

### Transactional Approval Stage

- **Admin Denied**
  - **NC Asset Review**
  - **Comments**
    - Sandi Worrell at 01/31/14 - 9:37 AM
    - We do not want to make this purchase.

### Modifying a Requisition

After submitting a requisition, circumstances may require you to change the requisition. Using the Edit Requisition option, you can change the original requisition, such as to update the quantity ordered, price, scheduled delivery date, or ship to location.

If the approval process has been started for this requisition, regardless of how complete the process is, the system may require the approval process to be started again.

If any line of a non-vendor catalog requisition has been transferred to a purchase order, you need to create a new requisition from scratch instead of modifying the existing requisition. Use the Requisition Name field and the Header Comments field to list the purchase order number and to indicate that the requisition is being created.
as a change order. In the header comments you must enter "Change Order for PO = 2XXXXXXXXX."

The change order is subject to the same budget checking and workflow as the original requisition. If you need to liquidate part or all of the encumbrance, fill out the Encumbrance Liquidation Request form on the Finance Division website. You should also contact the buyer when requesting a change to an existing purchase order.

1. Once you find the requisition you want to modify, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td>Choose Edit Requisition.</td>
</tr>
</tbody>
</table>

2. Click the Go button.

Result: The system displays the Edit Requisition page.

3. If the requisition is pending approval you receive a message telling you that editing the requisition may reinitialize the approval process. Click OK. Otherwise, skip this step.

4. Make the appropriate changes to your requisition.

5. Click the Save & preview approvals button.

6. Click the Check Budget button.

7. Click the Save & submit button.
The system restarts the approvals process by routing the document and sending a notification to the first approval level.

**Canceling a Requisition**

You can cancel a requisition if its purchase order has not yet been created. Vendor catalog orders can be canceled before they are submitted or before they are approved.

For non-vendor catalog orders, if a purchase order has already been created, a purchase requisition can’t be canceled. You will need to contact the buyer and they will then cancel the order and notify the vendor of the cancellation via change order. If you need to liquidate part or all of the encumbrance, fill out the Encumbrance Liquidation Request form on the Finance Division website. If you cancel a requisition that is in Approved status, it is important to notify the buyer.

1. Once you find the requisition you want to cancel, complete the field:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Action</td>
<td>Choose <strong>Cancel Requisition</strong>.</td>
</tr>
</tbody>
</table>

2. Click the **Go** button.
3. Click the **Cancel Requisition** button.

Result: The system displays the Requisition Details page.

Result: The system changes to the status to Canceled and returns to the Manage Requisitions page.

**Viewing a Requisition's Life Cycle**

1. To see all the other documents associated with a particular requisition, click the arrow to the left of the requisition line.
Result: The system displays all documents associated with the requisition.

2. Click on any document that is in color to view it.
To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Status</th>
<th>Budget</th>
<th>Total</th>
<th>&lt;Select Action&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000001729</td>
<td>10000001729</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>PO(s) Dispatched</td>
<td>Valid</td>
<td>5,028.00 USD</td>
<td></td>
</tr>
<tr>
<td>10000001728</td>
<td>10000001728</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>PO(s) Created</td>
<td>Valid</td>
<td>600.00 USD</td>
<td></td>
</tr>
<tr>
<td>10000001711</td>
<td>rece 107</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>Received</td>
<td>Valid</td>
<td>26,614.00 USD</td>
<td></td>
</tr>
</tbody>
</table>

**Requester:** Troy Gist Howell  
**Entered By:** Troy Gist Howell  
**Priority:** Medium  
**Pre-Encumbrance Balance:** $0.00 USD

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Status</th>
<th>Price</th>
<th>Quantity</th>
<th>UOM</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Battery</td>
<td>Received</td>
<td>600.00000 USD</td>
<td>10.00000 EA</td>
<td>INTREX COMPUTERS INC</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>File Cabinet</td>
<td>Received</td>
<td>250.00000 USD</td>
<td>8.00000 EA</td>
<td>INTREX COMPUTERS INC</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Status</th>
<th>Budget</th>
<th>Total</th>
<th>&lt;Select Action&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000001712</td>
<td>rece 107</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>Received</td>
<td>Valid</td>
<td>8,000.00 USD</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Status</th>
<th>Budget</th>
<th>Total</th>
<th>&lt;Select Action&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000001707</td>
<td>10000001707</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>Received</td>
<td>Valid</td>
<td>29,614.00 USD</td>
<td></td>
</tr>
<tr>
<td>10000001708</td>
<td>tgh ex 2 &amp; 5</td>
<td>UNCCH</td>
<td>09/19/2014</td>
<td>Partially Received</td>
<td>Valid</td>
<td>8,000.00 USD</td>
<td></td>
</tr>
</tbody>
</table>
4 Requester Preferences

In this chapter, you will learn how to use the Manage Requisitions page to:

- Create Requester Preferences Before Your First Order
- Update Requester Preferences
Working With Requester Preferences

Overview

Purchase requesters can set defaults for their purchase requests. These default values are established on the Requester Setup page. Once the default values are set up, they are used on all vendor catalog and non-vendor catalog requisitions, and can be changed from requisition to requisition.

Related Reference

For information on creating a new requisition, see Creating a New Purchase Requisition, page 1.

For information on canceling, copying, printing, editing, or finding an existing requisition, see Managing a Requisition, page 26.

Menu Path

Main Menu > Finance Menu> Set Up Financials / Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup

Steps - Working With Requester Preferences

Follow these steps to set up or change existing requester preferences:

1. Choose this menu option:

   Main Menu > Finance Menu > Set Up Financials / Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup

2. On the Find an Existing Value tab of the Requester Setup Page, complete either of the fields:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>Look up, or enter, your username.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter your first and last name.</td>
</tr>
</tbody>
</table>

3. Click the Search button.
The system displays the Requester Setup page.

4. Complete the fields for any default values you want to create for your requisitions. You must enter a default for the following chartfields:
   
   - Location Set ID (enter this field first)
   - Location
   - Phone
   - GL Unit (Business Unit)
   - Department

   Note: If you don't want to create a default value for any of the other fields, leave those fields blank.

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Set ID</td>
<td>Before entering any default information, enter either UNCCH or UNCGA in this field.</td>
</tr>
<tr>
<td>Ship To</td>
<td>Enter the ship to address or follow the steps below to search for the appropriate address:</td>
</tr>
<tr>
<td></td>
<td>a. Click the <strong>Lookup</strong> (magnifying glass) icon.</td>
</tr>
<tr>
<td></td>
<td>Result: The system displays the first 300 ship to addresses.</td>
</tr>
<tr>
<td></td>
<td>b. In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click <strong>Look Up</strong>.</td>
</tr>
<tr>
<td></td>
<td>c. Click the link for the ship to address you need.</td>
</tr>
</tbody>
</table>
In this field: | Do the following: |
--- | --- |
**Location** | Enter your location or follow the steps below to search for your location:  
a. Click the **Lookup** (magnifying glass) icon.  
Result: The system displays the first 300 addresses.  
b. In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click **Look Up**.  
c. Click the link for the location you need. |
**Phone** | Enter your phone number. |
**GL Unit** | Look up, or enter, the business unit. |
**Fund** | Look up, or enter, the fund. |
**Source** | Look up, or enter, the source. |
**Account** | Leave this field blank. The account value defaults based on the category code chosen on the requisition, or from the vendor’s website, though you can change it. |
**Dept** | Look up, or enter, the department. |
**PC Business Unit** | Look up, or enter, the PC business unit.  
Note: Only enter this field if you also enter a default Project ID. |
**Project ID** | Look up, or enter, the Project ID. |
**Activity** | Look up, or enter, the activity.  
Note: Only enter this field if you are also entering a Project ID. If used, this value will always be 1 unless it is for a capital project. |
**Program** | Look up, or enter, the program. |
**Cost Code 1** | Look up, or enter, cost code 1. |
**Cost Code 2** | Look up, or enter, cost code 2. |
**Cost Code 3** | Look up, or enter, cost code 3. |
**Affiliation** | Look up, or enter, the affiliation. |
**Fund Affiliation** | Look up, or enter, the fund affiliation. |

5. Click the **Save** button.
Result: The system saves the default values, which fill in automatically when you create a vendor catalog or non-vendor catalog requisition.