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About Supplier Catalog Orders

Overview

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

The departmental ePro requester punches out to the supplier's website from the ePro requisitions page in ConnectCarolina, adds items to the shopping cart, and submits them back to ePro.

The system pulls the information from the supplier'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 supplier when the next batch process job runs, which happens every hour of the workday.
Creating a Supplier Catalog Order

Overview

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

Supplier catalog purchases cannot exceed $5,000.00. If you need to make a purchase from a supplier 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 supplier catalog order, see Managing a Requisition, page 18.

Menu Path

Main Menu > Finance Menu > eProcurement > Requisition

Overview of Steps to Create a Supplier Catalog Order

Follow these steps to create a supplier catalog order:

1. Choose this menu option:

   Main Menu > Finance Menu > eProcurement > Requisition

   Result: If you haven't set up your required default values, the system displays the Requester Setup page.

   For more information about setting up your preferences, refer to Working With Requester Preferences, page 28. 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 28 instructions for more information.
3. Click the link for the supplier you want to order from.

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

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

5. Submit the order from the supplier's catalog to ePro.

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

Result: ConnectCarolina displays the Review and Submit page with the products or services you selected from the catalog.

Review and Submit Page

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 Supplier Catalog Order, page 6
   • Attach Documents to the Supplier Catalog Order, page 7
   • Enter Line Comments for the Supplier Catalog Order, page 9
   • Change the Default Information for a Line of the Supplier Catalog Order, page 10
   • Split Fund a Line of the Supplier Catalog Order, page 12
   • Modifying Line, Shipping, or Chartfield Information and Applying it to the Entire Requisition, page 14
   • Deleting Lines from the Supplier Catalog Order, page 16

2. When you have finished editing your supplier catalog order, or if you don't need to edit or add comments to your order, click the Pre-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 for Later approvals button. When you are ready to finish the requisition, refer to the
Managing a Requisition, page 18 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.

Result: The system kicks off the workflow process by routing the document to the first approval level.

**Name the Supplier 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 supplier catalog requisition later. Consider following a consistent naming convention that may include information like item purchased, date, purpose, or who it's for.</td>
</tr>
</tbody>
</table>

**Enter Comments Applicable to the Entire Order**

If you need to, you can enter comments that apply to the entire order.

1. Click the **Attachments and Comments** link.
2. Enter general information about the order in the Comments field.

3. 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>In this field</th>
<th>Do the following</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Supplier</td>
<td>Mark this checkbox if you want the comment to appear on the purchase order that is dispatched to the supplier.</td>
</tr>
<tr>
<td></td>
<td>Caution: Vendors may not read these comments. If you have special instructions, it is best to call the supplier 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>

Attach Documents to the Supplier Catalog Order

1. If you want to attach a document, click the Attachments and Comments link.

   Result: The system displays the Attachments page.

   Note: You can add line comments to individual items.

2. Click the Add Attachments 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: The 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 if you chose to view the file.

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 page.

Enter Line Comments for the Supplier Catalog Order

You can add comments to any or every line on your supplier 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.

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Supplier</td>
<td><strong>Nothing.</strong> This field is <strong>not used</strong> at UNC Chapel Hill for line items for</td>
</tr>
<tr>
<td></td>
<td>supplier catalog orders.</td>
</tr>
<tr>
<td></td>
<td>Caution: Call the supplier or sales representative if you have special</td>
</tr>
<tr>
<td></td>
<td>instructions to communicate to the supplier.</td>
</tr>
<tr>
<td>Show at Receipt</td>
<td>Mark this checkbox if you want the comment to appear on the receipt</td>
</tr>
<tr>
<td></td>
<td>documentation.</td>
</tr>
<tr>
<td>Show at Voucher</td>
<td>Mark this checkbox if you want the comment to appear on the voucher.</td>
</tr>
</tbody>
</table>

3. Click **OK**.

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

**Change the Default Information for a Line of the Supplier 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 supplier catalog orders at UNC Chapel Hill.</td>
</tr>
<tr>
<td>Ship To</td>
<td>Enter the Ship To location or follow the steps below to search for the appropriate Ship To location:</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 location you need.</td>
</tr>
<tr>
<td></td>
<td>Result: The system will send this line to the selected location.</td>
</tr>
<tr>
<td>Attention</td>
<td>Enter the name of the person to whose attention the shipment will be sent.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you work in Auxillary Services, enter the shop, job, and phase code here, if applicable.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location you are ordering from.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Do not change the quantity.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you accidentally selected the wrong quantity on the supplier’s website, you will need to cancel the order and create a new supplier catalog order.</td>
</tr>
</tbody>
</table>
2. To modify chartfield information, click the Chartfields2 tab.

Result: The system displays any default chartfields from the Requester Setup page. The account number is provided 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 at ccinfo.unc.edu.

**Split Fund a Line of the Supplier 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.

Note: You can add more than one row at a time.
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>
</tbody>
</table>

Note: 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.

Location       Enter the location you are ordering from.

Quantity       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.

Percent        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.
4. To enter chartfield strings, click the **Chartfields2** tab. You can change chartfield strings for both lines at the same time.

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

5. To divide the payment further, add more rows and chartfield strings by repeating steps 1 through 4.

**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 **Mass Change** 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 Supplier or Category codes at the top, because they are determined by the supplier that you used and the items your ordered. Do not enter anything in the buyer field for supplier catalog orders.

Note: For information about chartfields, refer to the Chartfield Structure quick reference card.
4. Click the **OK** button.

Result: The system displays the Distribution Change Options page.

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 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 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 page

**Deleting Lines from the Supplier 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. In the row that you want to delete, click the **Trash Can** icon.
2. When prompted, click the **OK** button to confirm that you want to delete the selected lines.

![Delete Confirmation](image)

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.
Managing a Requisition

Overview

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

- Copying a Requisition, page 20
- Printing a Requisition, page 21
- Viewing the Reason a Requisition was Rejected, page 22
- Modifying a Requisition, page 24
- Canceling a Requisition, page 25
- Returning Items, page 25
- Viewing a Requisition's Life Cycle, page 26

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

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>
</tbody>
</table>
In this field: | Do the following:
---|---
Requisition Name | If the requisition was given a name, enter the name of the requisition you are searching for.
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-supplier 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 Checkout - Review and Submit page of the 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>Choose <strong>Copy Requisition</strong>.</td>
</tr>
</tbody>
</table>

2. Click the **Go** button.

   ![Requisitions screenshot]  
   
   **Result:** The system copies the requisition and displays the Checkout - Review and Submit page 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 for Later** button.

5. Click the **Pre-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 Print</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 View Approvals.</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.

**Budget Error Notification**

Procurement document creators will receive email alerts when the chartfield strings used in existing purchase requisitions and purchase orders contain budget errors.

The email alert includes: document type, document number, a link to a training video of how to correct the budget error, and a link to the transaction detail.

A sample of the email alert is below:
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-supplier 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, notify the buyer and submit a change order request to Purchasing Services (see Processing a Change Order Request).

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

2. Click the Go button.

Result: The system displays the Edit Requisition - Review and Submit 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 for Later button.

6. Click the Pre-Check Budget button.

7. Click the Save & submit button.

Result: The system restarts the approvals process by routing the document and sending a notification to the first approval level.

Canceling a Requisition

ePro is an electronic business-to-business system. This means that the orders are transmitted electronically every hour. If an ePro order has not already been processed by the supplier and you need to cancel, follow these steps.

1. Contact the supplier directly.

2. Once you have received confirmation of the cancelation, email the confirmation to Procurement at eprovendors@unc.edu.

Result: Procurement manually relieves the encumbrance in ConnectCarolina.

Returning Items

If an ePro order is incorrect but has already been processed by the supplier, you will need to contact the supplier to request a Return Merchandise Authorization (RMA).

Note: You will need to provide the supplier with purchase order number; suppliers do not know anything about purchase requisitions. The supplier will then process an electronic Credit Memo for the returned items.

Exception: Staples does not use RMAs. Staples can process returns two ways:

- Log into Staples within ConnectCarolina. Click on My Orders and then On-Line Return.

- Call Staples with the Purchase Order number.

To see your Purchase Order number:
1. Navigate to **Main Menu > Finance Menu > eProcurement > Manage Requisitions.**

2. Enter the appropriate search criteria to find your order and click the **Search** button.

3. Click the **Expand** button by your order.

![Image of Main Menu and Finance Menu]

4. Click on the **Purchase Orders** icon to view the Purchase Order number.

![Image of Purchase Orders icon]

**Note:** The Purchase Orders icon will only be lit up if a Purchase Order has been created.

**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.

![Image of Manage Requisitions]

Result: The system displays all documents associated with the requisition.

2. Click on any document that is in color to view it.
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Status</th>
<th>Price</th>
<th>Currency</th>
<th>Quantity</th>
<th>UOM</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test</td>
<td>Open</td>
<td>1.0000</td>
<td>USD</td>
<td>1.0000</td>
<td>EA</td>
<td>EATMANS CARPETS &amp; INTERIORS</td>
</tr>
</tbody>
</table>
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 supplier catalog and non-supplier 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 18.

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>Enter your UNC Onyen.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter your first and last name.</td>
</tr>
</tbody>
</table>

3. Click the Search button.
Result: 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><strong>Result:</strong></td>
<td>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>
<tr>
<td>In this field</td>
<td>Do the following</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Location</td>
<td>Enter your location or follow the steps below to search for your location:</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 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 location you need.</td>
</tr>
<tr>
<td>Phone</td>
<td>Enter your phone number.</td>
</tr>
<tr>
<td>GL Unit</td>
<td>Look up, or enter, the business unit.</td>
</tr>
<tr>
<td>Fund</td>
<td>Look up, or enter, the fund.</td>
</tr>
<tr>
<td>Source</td>
<td>Look up, or enter, the source.</td>
</tr>
<tr>
<td>Account</td>
<td>Leave this field blank. The account value defaults based on the category code chosen on the requisition, or from the supplier's website, though you can change it.</td>
</tr>
<tr>
<td>Dept</td>
<td>Look up, or enter, the department.</td>
</tr>
<tr>
<td>PC Business Unit</td>
<td>Look up, or enter, the PC business unit.</td>
</tr>
<tr>
<td></td>
<td>Note: Only enter this field if you also enter a default Project ID.</td>
</tr>
<tr>
<td>Project ID</td>
<td>Look up, or enter, the Project ID.</td>
</tr>
<tr>
<td>Activity</td>
<td>Look up, or enter, the activity.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Program</td>
<td>Look up, or enter, the program.</td>
</tr>
<tr>
<td>Cost Code 1</td>
<td>Look up, or enter, cost code 1.</td>
</tr>
<tr>
<td>Cost Code 2</td>
<td>Look up, or enter, cost code 2.</td>
</tr>
<tr>
<td>Cost Code 3</td>
<td>Look up, or enter, cost code 3.</td>
</tr>
<tr>
<td>Affiliation</td>
<td>Look up, or enter, the affiliation.</td>
</tr>
<tr>
<td>Fund Affiliation</td>
<td>Look up, or enter, the fund affiliation.</td>
</tr>
</tbody>
</table>

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