




## Updates to Requisitions Version 8.9

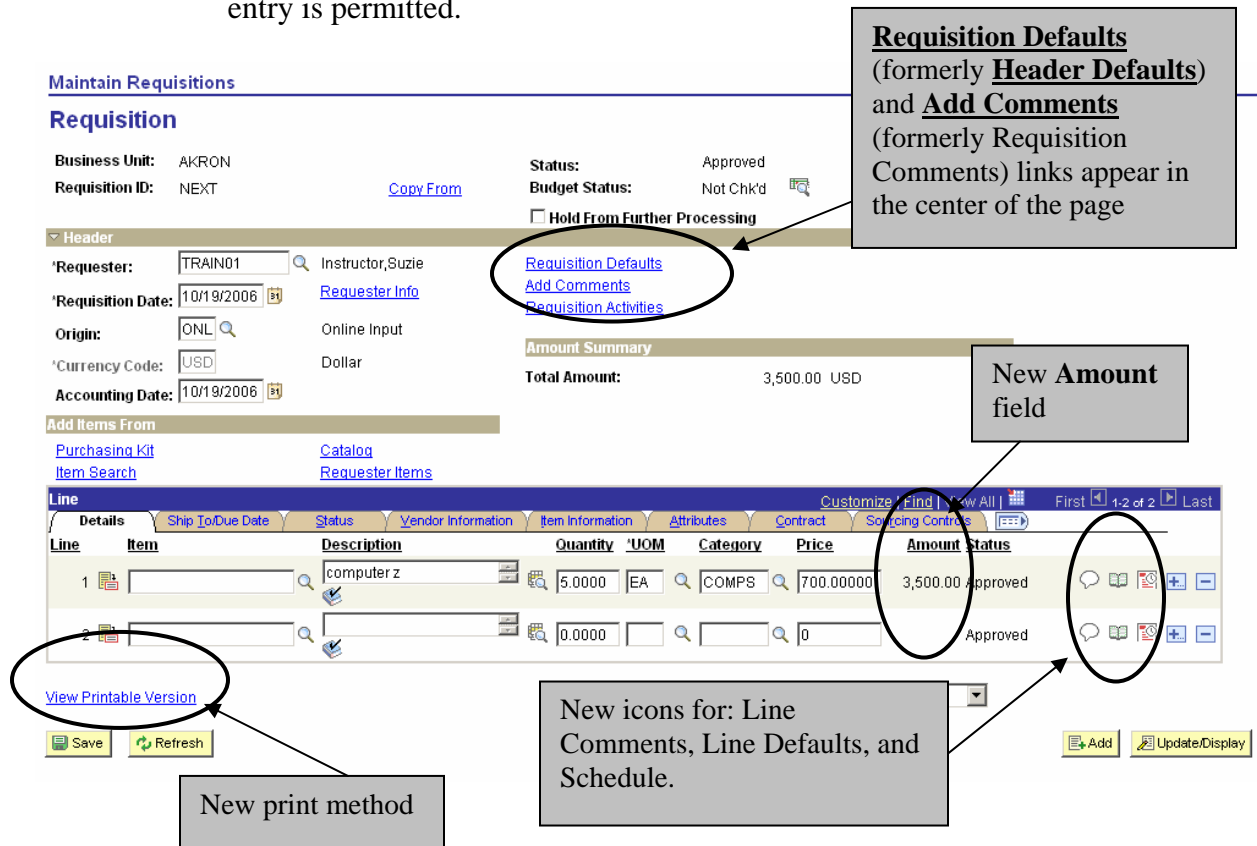
1. The menu navigation has been streamlined. From the main menu select **Purchasing**. The screen below will appear. To add/update/view a requisition click the **Add/Update Requisitions** link.



2. The **Requisition** page layout has been modified slightly.
  - a. There are no tab labels on the page (previously there were tabs labeled **Form** and **Schedule**).
  - b. The fields at the top of the page are in a slightly different order.
  - c. The **Line Comments**, **Line Defaults**, and **Schedule** links are no longer at the bottom of the page. Instead, icons replace the links and appear on the same line as the line item. The table below summarizes the new icons.

Previous version 8.0	New version 8.9
Line comments	
Line Defaults	
Schedule	

- d. The **Header Defaults** link has been renamed to **Requisition Defaults** and is now in the center of the page rather than the bottom.
- e. The **Requisition Comments** link has been renamed to **Add Comments** and is now in the center of the page rather than the bottom.
- f. The **Ship To** field has been removed from the Requisition page (now appears on the Requisition Defaults page).
- g. An **Amount** field appears for each line item and is automatically calculated as the price per item \* quantity. Click the Refresh button to update this field. Note: This field is updated automatically – no data entry is permitted.



**Requisition Defaults** (formerly **Header Defaults**) and **Add Comments** (formerly Requisition Comments) links appear in the center of the page

**New Amount field**

**New icons for: Line Comments, Line Defaults, and Schedule.**

**New print method**

The screenshot shows the 'Maintain Requisitions' page for a Requisition. Key elements include:
 

- Header:** Business Unit: AKRON, Requisition ID: NEXT, Status: Approved, Budget Status: Not Chk'd.
- Requester Info:** Requester: TRAIN01 (Instructor, Suzie), Requisition Date: 10/19/2006, Origin: ONLN (Online Input), Currency Code: USD (Dollar), Accounting Date: 10/19/2006.
- Amount Summary:** Total Amount: 3,500.00 USD.
- Line Table:**

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1		computer z	5.0000	EA	COMPS	700.00000	3,500.00	Approved
2			0.0000			0		Approved
- Navigation:** Includes 'View Printable Version', 'Save', 'Refresh', 'Add', and 'Update/Display' buttons.

3. The Category lookup has been enhanced to add the **Account** to the lookup. This should assist with the appropriate selection of the category.

**Look Up Category**

SetID: AKRON

Category: begins with [dropdown] [input]

Description: begins with [dropdown] [input]

Account: begins with [dropdown] [input]

Look Up Clear Cancel [Basic Lookup](#)

**Search Results**

[View All](#) 1-100 of 230 [Last](#)

Category	Description	Account
<a href="#">ACATH</a>	<a href="#">Accomodation - Athletic</a>	7020
<a href="#">ACCNE</a>	<a href="#">Accomodation - Non-employee</a>	7005
<a href="#">ACCOM</a>	<a href="#">Accommodation - Employee</a>	7001
<a href="#">ACSRI</a>	<a href="#">Accom-Student Recruit In-State</a>	7010
<a href="#">ACSRO</a>	<a href="#">Accom-Studnt Recruit Out-State</a>	7011
<a href="#">ADDIS</a>	<a href="#">Advertising Specialties</a>	5789

4. The printing of a requisition has been slightly modified in order to decrease the number of steps required.
  - a. Simply click the “**View Printable Version**” link located on the lower left corner of the Requisition.
  - b. You may be prompted to save the document – click “**Yes**”.
  - c. A separate window will open displaying the status of the print process – do NOT close this window.
  - d. Once the process is complete the Requisition will open in a new Internet Explorer/Adobe window.

5. The **Requisition Defaults** (formerly Header Defaults) page layout has been modified slightly:
  - a. The fields at the top of the page are in a slightly different order.
  - b. The process for entering data on this page remains unchanged – the only fields any data will be entered in are the **Vendor**, **Due Date**, and **Speed Chart**.

Maintain Requisitions

---

**Requisition Defaults**

**Business Unit:** AKRON      **Requisition Date:** 10/19/2006  
**Requisition ID:** NEXT      **Status:** Approved

**Default Options**

**Default**      If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

**Override**      If you select this option, all default values entered on this page override the default values found in the default hierarchy.

**Header**

**Buyer:**        **Unit of Measure:**    
**Vendor:**        **Location:**    
**Category:**        [Vendor Lookup](#)

**Item Defaults**

**Ship To:** RECEIVING       Central Receiving      **Distribute by:** Quantity   
**Due Date:**     
**Ultimate Use Code:**        [Modify Shipping Address](#)

**Amount Summary**

**SpeedChart:**

**Distributions** Customize | Find | View All |

**Details**

Dist	Percent	GL Unit	Entry Event	Account	Fund	Dept	Program	Class	Bud Ref	PC Bus Unit	Project	Activity	Budget Date	Location	
1		AKRON <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	10/19/2006	LIB

OK    Cancel    Refresh

6. The Standard Comment link has been renamed to Copy Standard Comments.

**Header Comments**

**Business Unit:** AKRON      **Requisition Date:** 10/19/2006  
**Requisition ID:** NEXT      **Status:** Approved

\*Sort Method:  \*Sort Sequence:

**Comments** Find | View All First 1 of 1 Last  
[Copy Standard Comments](#) Comment Status: Active

Send to Vendor    Shown at Receipt    Shown at Voucher

**Associated Document**  
Attachment     Email

From -> REQ AKRON-NEXT

7. A file can be attached to the requisition by clicking the **Attach** button on the Header Comments page.

- a. You will then need to click the Browse button to locate the file and click the Upload button.

- b. You should see the filename listed next to the **Attachment** heading. *Do NOT click the Email box as this function is not being used at the present time.*
- c. You may delete the attachment up until the requisition is approved. Should you need to modify the attachment, delete the attachment and then make your changes to the file and re-upload the document.

**Once approved, you will be unable to make any changes to the attachment.**

8. If entering a Type 2 Requisition – **One Vendor, Multiple SpeedCharts per Line Item**, the **Distribution** link has been replaced by a Distribution  icon .

Maintain Requisitions

Schedule

Business Unit: AKRON      Requisition Date: 10/19/2006  
 Requisition ID: 0000037410      Status: Approved

[Return to Main Page](#)

Line	Item	Quantity	Amount	Status
1	<a href="#">example 1</a>	2.0000 Each	800.00 USD	Active

Sched	Ship To	Quantity	Price	Amount	Due Date	Status
1	RECEIV	2.0000	400.00000	800.00	10/31/2006	Active

[Add Ship To Comments](#)

9. The **Requisition** and **Requisition Defaults** pages may be modified to change the tab order of the fields on the page.
  - a. Click the **Customize Page** link in the upper right corner of the page.
  - b. Click the **Clear Tabbing Order** button. This removes the tab order from all the fields on the page.
  - c. Click the “X” for a field to include that field in the tabbing sequence – click the fields in the order you wish to tab to them.
  - d. Refer to **Appendix D** of the revised “**Requisitions Manual**” for detailed instructions.

For complete training documentation and tutorials visit the Software Training Services web site at:

<http://www.uakron.edu/its/learning/training/PSoft8Fin.php>

If you have questions, please send them to:

<mailto:pstrain@uakron.edu>