Managing Requisitions Quick Reference Guide

CART OVERVIEW

Items that you wish to order are initially put into a Cart where you define your products, quantities, ship to address, and accounting fields. Once your Cart is submitted into workflow, it becomes a Purchase Requisition (PR).

1. When you have finished shopping, click the **7,250.00 USD** icon at the top right of the page followed by **View My Cart** to access your active cart.
2. Each cart icon will look different, updated with the dollar total in the cart.

EDIT CART

The first screen you see when clicking into your cart is the Edit Cart page:

Here you can update the Cart Name for your cart. To update the quantity of an item, change the value in the **Quantity** field, and click **Update**. When you have finished making all necessary changes, click **Proceed to Checkout**.

REVIEW CART

The Review Cart page is where you will enter the ship to address, accounting codes, and make any other changes prior to submitting your cart for approvals.

SHIP TO ADDRESS

The Ship to address is a required field on all carts. To update the Ship to address:

1. Click the **Summary Tab** underneath the **Requisition Tab**.
2. Locate the **Shipping** section and click **edit** to the right of the address.
3. A pop-up window will appear where you can click **select from org addresses** to locate a new or an alternative address.
4. Verify the information that appears is correct, and if not, make any necessary changes, and then click **Save**.

ACCOUNTING CODES

You can assign accounting codes to the entire cart or individually to each line item. The Account and Speedchart are required values. Once selected, the Dept, Fund, Program, Class & GL Business Unit will automatically populate based upon the values chosen

1. To assign account codes, navigate to the **Accounting Codes** section below **Shipping** and click on the **edit** button to the far right.
2. From here, you can search for values for each required code.

3. Under Account, click the **Select from all values...** link to locate the appropriate value from the search menu. Follow the same process to select the Speedchart value.
4. Click **Save** when all values have been entered.
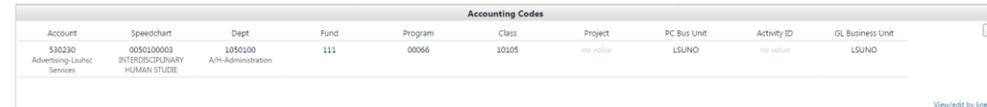
To update the account codes for each line individually:

1. Click the **edit** button next to each line item.
2. Follow the instructions above to update the account codes for each line item.

REQUISITION APPROVALS

Based on the contents of your cart, each line item cost, the total PR cost, and the accounting code values, your cart will be subjected to one or more approvals before becoming a Purchase Order. To see which approvals your cart is subject to:

1. Prior to submitting your cart, click the **PR Approvals** tab.
2. You will see a diagram with future workflow steps similar to this one:

PLACE ORDER

Once all required fields have been completed and verified, click

Submit Requisition to submit your requisition for approval. Your cart is now a Requisition and the system will provide you with a Requisition number that can be used to track the progress of the requisition through the approval process.