Quick Reference for Changes in 9.2

For Requisition Entry:

Requesters will now be required to budget check the requisition before it can route to the signature authority. Everything will be handled on the requisition page and there will no longer be a need to “approve chartfields”.

Step 1: Add a new requisition and enter the requisition information as normal (requisition defaults, vendor, budget string, line information for items being purchased).

Step 2: Save the requisition to generate a requisition ID as normal.

Step 3: Click the budget status icon to budget check the requisition after generating a requisition ID.

Once the budget check is complete, you should receive a “Valid” Budget Status

If you receive an “Error” for budget status, double check the budget string used to make sure it was entered correctly. If the budget string is entered correctly, you will need to contact the Budget Office for help or ORA if using a grant.
Step 4: After the budget status is “valid” → Click the green check mark to change the status from “Open” to “Pending”.

After clicking the green check mark, you will be routed to the following screen showing the requisition status is “pending approval” and needs to be approved by the signature authority on the budget. You have successfully entered the requisition and the requisition should have routed to the signature authority for approval. The signature authority will receive an email with a link for approval.

**Requisitions**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Requisition</th>
<th>Requisition Name</th>
<th>Requisition Status</th>
<th>Requester</th>
<th>Req Date</th>
<th>Total Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>USMPO</td>
<td>0000078902</td>
<td>0000078902</td>
<td>Pending Approval</td>
<td>Turner, Jessica</td>
<td>07/11/19</td>
<td>6,664.50</td>
</tr>
</tbody>
</table>

**IMPORTANT:** Requesters will no longer have access to freely modify an existing requisition once it has routed. The signature authority must recycle the requisition back to the requester before any modifications can be made.