

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.

Maintain Requisitions

Requisition




Business Unit	USMPO	Status	Open	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition ID	0000078902	Budget Status	Not Chk'd	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Requisition Name	<input type="text" value="0000078902"/>	<input type="checkbox"/> Hold From Further Processing				
▼ Header ?						

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

Status	Open	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Budget Status	Valid	<input type="checkbox"/> Hold From Further Processing		

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".

Status Open   

Budget Status Valid

Hold From Further Processing

Once you have clicked 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

Req Inquiry

Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt	
USMPO	0000078902	0000078902	Pending Approval	Turner, Jessica Lynn	07/11/2019	6,664.50	USD

Search

Notify

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.