Create a Special Request Requisition

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.

3. To enter Requisition Defaults (**Required Step**), click the **Requisition Settings** link.
   a. Enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving, this is not advised).
   b. Expand the **Line Defaults** section by clicking on the expand button.
c. To enter a default vendor for all requisition lines, select it using the Look Up icon.
d. To enter a default Buyer for all requisition lines, select it using the Look Up icon. There are only 3 Buyers to select from.
e. If all of your line items will have the same NIGP code, enter it in the Category field. A list of commonly used codes can be found HERE.
f. If all of your line items will have the same Unit of Measure, enter it or select it using the Look Up icon.
g. To enter a default Due Date for each line item, enter it or select it using the Calendar icon. The Due Date for a Requisition is typically within 30 days of the current date.
h. To enter a default “Attention To” for each line, enter it in the Attention field.
i. In the Accounting Defaults – Chartfields 1 tab, the Location, GL Unit, and Department originally default from your User ID. If needed, you can change the Fund Code, Department, Program, Class, and Project that are to be charged for each line item.
j. Click the OK button.

4. Select Special Requests

5. For each line that you want to enter, complete the following steps (some fields may have been completed through the requisition defaults – these defaults can be overwritten on this page if needed):

   a. Enter an Item Description
   b. Enter the Price of the item
   c. Enter the Quantity requested
   d. Enter or select the Unit of Measure
   e. In the Category field, enter or select the NIGP Code for the item
   f. Enter or select the Due Date for the item
   g. Enter or select the Supplier ID for the item if you have a preferred vendor
h. If you have any information that needs to be sent to the vendor, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes.

i. Select the **Add to Cart** button.

j. Confirm the **Requisition Summary** updated with your new requisition line.
6. Select the **Checkout** button.

7. To update a requisition line’s distribution information, click its **Expand** button and make necessary updates.

8. To update multiple requisition line’s information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.

9. To enter a **comment** on an individual requisition line, click that line’s **call out** (comment) icon. Enter the comments and select where you want the comment to appear.

10. Enter any justification or comments you wish to on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Click the **Save for Later** button, then the **Preview Approvals** link.
12. Insert any additional approvers if necessary.
13. Click the **Submit** button.

**Charge a Requisition Line Item to a Different Chartstring**

1. After adding items to requisition, ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line you want to modify by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Chartfields 2** tab to update the following if needed:
   a. Account
   b. Fund Code
   c. Department
   d. Program
   e. Class
5. Go to the **Chartfields 3** tab to update the following if needed:
   a. Project
6. Make other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

**Charge Multiple Requisition Line Items to a Different Chartstring**

1. After adding items to requisition, ensure you are on the **Checkout and Submit** page.
2. Select the lines you want to change distribution information for by placing a checkmark in their select boxes.
3. Select the **Mass Change** button. (In v8.9, this link was called “Modify Line/Shipping/Accounting.”)
4. In the Accounting Information section, enter the new **Chartfields Values** and then click **Apply**.
5. On the **Distribution Change Options**, to apply changes to all selected lines, select the option “**All Distribution Lines**” and click **OK**.

6. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

**Split Distribution (Split Funding) for a Requisition Line**

1. After adding items to requisition, ensure you are on the **Checkout - Review and Submit** page.

2. Expand the line by clicking on its **Expand Section** button.

3. Choose whether to distribute by **Amount** or **Quantity** through the drop down list.

4. Locate the **Accounting Lines** section.

5. At the end of the line under the **Chartfields1** tab, click the **Add a New Row** button (+).

6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
   a. In the original distribution line, edit the **quantity** for the revised distribution.
   b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
   c. In the new distribution line, enter the **quantity** for the second Chartstring.
   d. **Tab** out of the **Quantity** field. The **Percent** field will adjust accordingly.
   e. Make the necessary **changes** to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.

7. If distributing by **Amount**, continue. Otherwise, go to step 8.
   a. In the original distribution line, edit the **amount** for the revised distribution.
   b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
   c. In the new distribution line, enter the **amount** for the second Chartstring.
   d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
e. Make the necessary changes to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.

8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the Save and Preview Approvals button.

**Insert an Ad Hoc Approver**

**Department and Proj. Approval**

1. After adding items to requisition, ensure you are on the Checkout - Review and Submit page.
2. Make any necessary changes to the line item information on the requisition.
3. Select the Save for Later button.
4. To insert an Ad Hoc approver, click the green plus (+) button where you want the approver to go.
5. Enter the User ID of the Ad Hoc approver, or use the look up button to select the User ID.
6. Select either the Approver or Reviewer radio button.
7. Click the insert button.
8. You should now see the additional approver in the approval chain.
9. To remove the Ad Hoc approver, select the red minus (-) button for that approver. Click OK when prompted.
10. Submit the requisition for approval by clicking the Submit button.