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 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.

![Image of Create Requisition page]

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

![Image of Create Requisition page with Add to Cart button highlighted]

j. Confirm the **Requisition Summary** updated with your new requisition line.
k. To add an addition requisition line, complete steps 5a through 5j again.

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 - Review 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 “Replace 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.

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**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.