








|  | <p>Navigate to the following path:</p> <p style="text-align: center;"><i>eProcurement → Create Requisition</i></p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|-----------------------|-------------|-------------|-----------|--------------|-------|-------|---|--------------------------|-----------------------|--------|------|-----------|----------|---|-----------------------------|-----------------------|--------|------|--------|--------|----------------------|--|--|--|--|--|--------------|
| | <p>The Create Requisition page opens.</p> <p>Enter your requisition following the procedures for Description Only or Amherst Marketplace as appropriate until 3.Review and Submit</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Step 1.</p> | <p>Click the Review and Submit Tab link on the Create Requisition page.</p> <div data-bbox="396 758 1398 852" style="border: 1px solid black; padding: 5px;"> <p>Create Requisition</p> <p>  1. Define Requisition  2. Add Items and Services  3. Review and Submit </p> </div> <div data-bbox="1252 688 1511 741" style="border: 1px solid black; padding: 2px; font-size: small;"> Review & Submit </div> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | <p>The 3.Review and Submit Tab appears on the Create Requisition page.</p> <div data-bbox="396 953 1390 1583" style="border: 1px solid black; padding: 5px;"> <p>Create Requisition</p> <p>  1. Define Requisition  2. Add Items and Services  3. Review and Submit </p> <p>Review the details of your requisition, make any necessary changes, and submit it for approval.</p> <p> Business Unit: <input type="text" value="UMAMH"/> UMass Amherst *Requester: <input type="text" value="TRN_AMH_EPRO_01"/> Amherst ePro Training *Currency: <input type="text" value="USD"/> Requisition Name: <input type="text" value="MULTI LINE REQ"/> <input type="checkbox"/> Hold From Further Processing Priority: <input type="text" value="Medium"/> </p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Vendor Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>CANON LC7301 FAX MACHINE</td> <td>IKON OFFICE SOLUTIONS</td> <td>1.0000</td> <td>Each</td> <td>1,157.000</td> <td>1,157.00</td> </tr> <tr> <td>2</td> <td>ESP QC POWER PROTECTION FIL</td> <td>IKON OFFICE SOLUTIONS</td> <td>3.0000</td> <td>Each</td> <td>79.500</td> <td>238.50</td> </tr> <tr> <td colspan="6" style="text-align: right;">Total Amount:</td> <td>1,395.50 USD</td> </tr> </tbody> </table> <p> <input type="checkbox"/> Select All / Deselect All <input type="button" value="Add to favorites"/> <input type="button" value="Modify Line / Shipping / Accounting"/> <input type="button" value="Delete"/> </p> <p>Justification/Comments</p> <p> <input type="checkbox"/> Send to Vendor <input type="checkbox"/> Show at Receipt <input type="checkbox"/> Show at Voucher </p> <p> <input type="button" value="Check Budget"/> <input type="checkbox"/> Save as Template </p> <p> <input type="button" value="Save & submit"/> <input type="button" value="Save & preview approvals"/> <input type="button" value="Cancel requisition"/> Find more items </p> </div> | Line | Description | Vendor Name | Quantity | UOM | Price | Total | 1 | CANON LC7301 FAX MACHINE | IKON OFFICE SOLUTIONS | 1.0000 | Each | 1,157.000 | 1,157.00 | 2 | ESP QC POWER PROTECTION FIL | IKON OFFICE SOLUTIONS | 3.0000 | Each | 79.500 | 238.50 | Total Amount: | | | | | | 1,395.50 USD |
| Line | Description | Vendor Name | Quantity | UOM | Price | Total | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | CANON LC7301 FAX MACHINE | IKON OFFICE SOLUTIONS | 1.0000 | Each | 1,157.000 | 1,157.00 | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | ESP QC POWER PROTECTION FIL | IKON OFFICE SOLUTIONS | 3.0000 | Each | 79.500 | 238.50 | | | | | | | | | | | | | | | | | | | | | | | |
| Total Amount: | | | | | | 1,395.50 USD | | | | | | | | | | | | | | | | | | | | | | | |
| | <p>We need to to split the cost between 2 budgets. This is is called a Split Distribution. A budget row may be split out to as many as ten chartfield strings. When you split distributions, the sum of all amounts must equal the Total Price value of the line.</p> <p>The dollar value of a purchase can be split between budgets 2 different ways:</p> <ul style="list-style-type: none"> • By Quantity, or • By Amount <p>To split the budget distribution, we need to add a new accounting Row to Line 1 and insert new Chartfield information for the 2nd budget to be charged. In this example, we will split the Line by Amount.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Step 2.

Click the **Expand Section** icon (⏏) for Requisition Line 1 to expand that line.

Requisition Line 1 with expanded details.

Business Unit: UMass Amherst
 *Requester: Amherst ePro Training *Currency:
 Requisition Name: Hold From Further Processing Priority:

| Line | Description | Vendor Name | Quantity | UOM | Price | Total |
|------|-----------------------------|--------------------------------------|----------|------|-----------|----------|
| 1 | ZEISS DEMO EQUIPMENT - AXIO | CARL ZEISS MICROIMAGING INCORPORATED | 1.0000 | Each | 8,192.000 | 8,192.00 |

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity:
 Status: Active *Ship To: Modify Shipping Address
 Attention:
 *Distribute by:

| Line | Status | Dist Type | *Location | Quantity | Percent | Amount | GL Unit | SpeedChart Key | Account | Fund | *Dept |
|------|--------|-----------|-----------|----------|----------|----------|---------|----------------|---------|-------|--------|
| 1 | Open | | GDA040 | 1.0000 | 100.0000 | 8,192.00 | UMAMH | | 763210 | 21620 | A22080 |

2 ZEISS 0000001222047000 AV4 CARL ZEISS MICROIMAGING INCORPORATED 1.0000 Each 2,880.000 2,880.00

Select All / Deselect All Total Amount: 11,072.00 USD

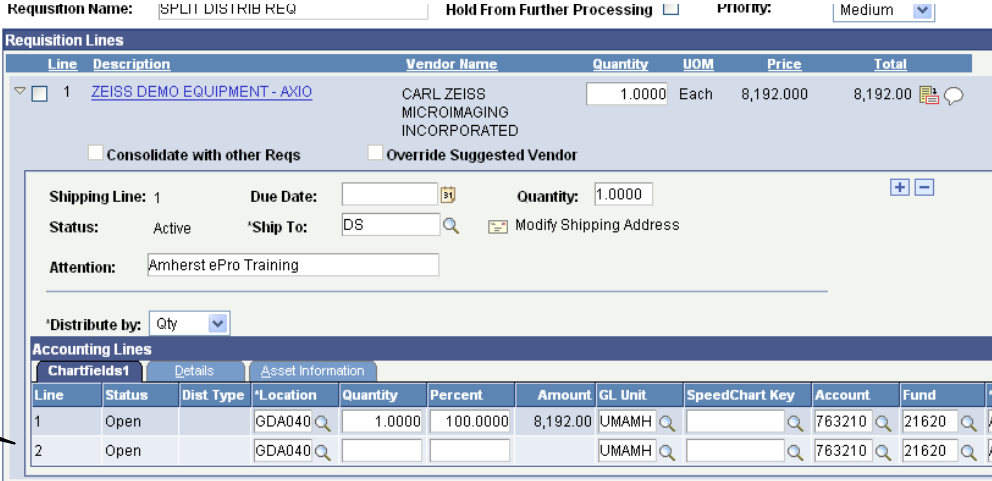
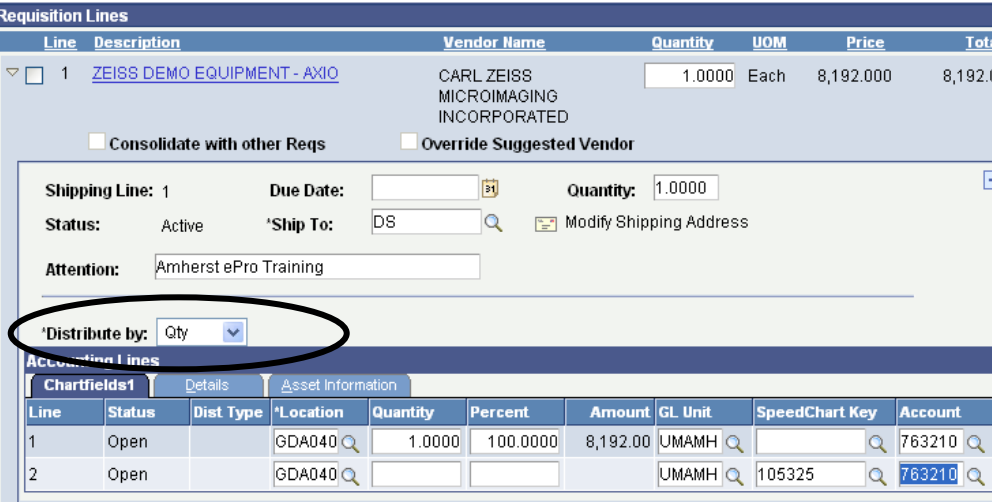

Accounting Lines

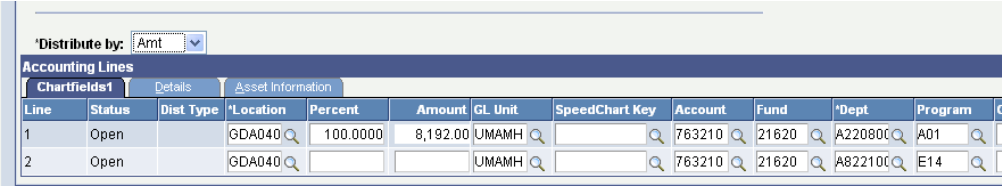
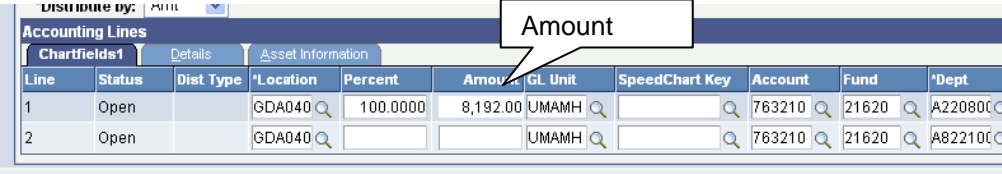

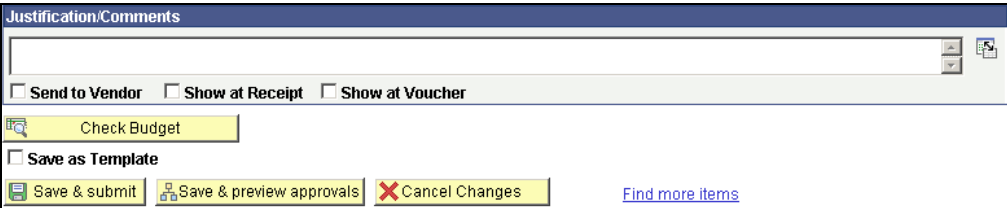
Step 3.

Scroll over to the right to the end of the Accounting Lines
 Click the Add a New Row Icon (+) button for **Accounting Line1**.

customize | Find | View All | First 1 of 1 Last

| Oper Unit | Affiliate | Fund Affil |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | |
|--------------------|--|
| <p>Second line</p> | <p>A new row is inserted on Line 1</p>  |
| <p>Step 4.</p> | <p>Click in the SpeedChart field for Row 2.</p> |
| <p>Step 5.</p> | <p>Enter your speedchart Tab out of the field</p> |
| <p>Step 6.</p> | <p>Click the Distribute by drop-down arrow</p>  |
| <p>Step 7.</p> | <p>Select Distribute by: Amt (Amount) from the list:</p>  |

| | |
|---------------------------------|---|
| <p>Step 8.</p> | <p>The page will refresh and the SpeedChart will disappear and the appropriate chartfields will be entered.</p>  |
| <p>Step 9.</p> | <p>Click in the Amount field, Row 1, at the beginning of the entry.</p>  |
| <p>Step 10.</p> | <p>Delete the amount and enter the appropriate amount for line 1 and Tab out of field.</p> |
| <p>Step 11.</p> | <p>Click in the Amount field for Row 2.</p> |
| <p>Step 12.</p> | <p>Enter the Total Price balance and Tab out of field.</p> |
| <p>Step 13.</p> | <p>Click the  Save & submit button to save the requisition and submit it to Workflow.</p>  |
| <p>Save & Submit</p> | <p>The Requisition Confirmation page opens. Make note of your requisition ID</p> |

| | |
|--|--|
| | <p>Confirmation</p> <hr/> <p>Requested For: Amherst ePro Training Number of Lines: 2 Requisition Name: SPLIT DISTRIB REQ Total Amount: 11,072.00 USD Requisition ID: R000017707 Justification: EQUIPMENT WILL BE ON TRIAL THROUGH 12/31/06 Business Unit: UMAMH Priority: Medium Budget Status: Valid</p> <p style="text-align: center;">Requisition ID</p> <p>Department Approval</p> <div style="border: 1px solid black; padding: 5px;"><p>Line 1: Pending Start New Path ZEISS DEMO EQUIPMENT - AXIOVISION 410</p><p>Department Approver - Dist 01</p><p>Pending Not Routed Multiple Approvers Multiple Approvers PO Dept Approver 1 - Dist 1 PO Dept Approver 2 - Dist 1</p><p>Department Approver - Dist 02</p><p>Pending Not Routed Multiple Approvers Multiple Approvers PO Dept Approver 1 - Dist 2 PO Dept Approver 2 - Dist 2</p></div> |
| | <p>Click the budget check button at the bottom of the page to budget check the requisition</p> |
| | <p>END OF EXERCISE</p> |

| | |
|-------------------------|-------------------------|
| Last Edited Date | 6/20/2008 |
| Last Edited By | Kristina England |