Create a Requisition Using a State Fund

This job aid describes how to create a one line requisition using a State Fund. A state fund requisition is description-only with a State Fund Code that begins with the number 1. The following tasks will be performed:

- Assign a State Fund SpeedChart Key.
- Submit the requisition to workflow.
- Verify the State PO Flag box is checked off on the UMASS Req Info page.

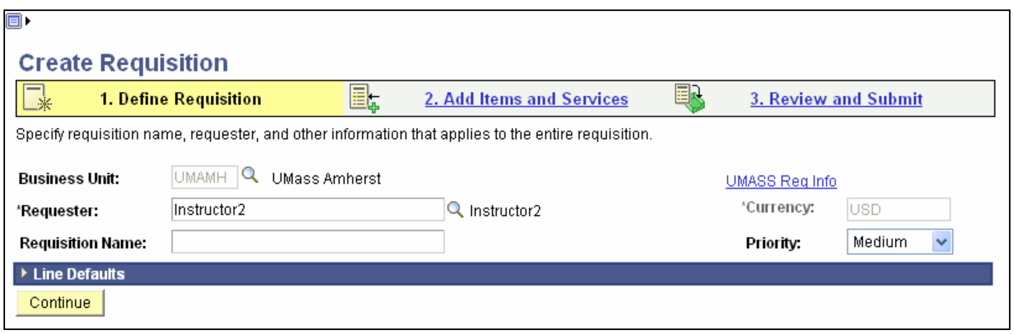
A PS State Fund PO should never cut a check. Checks are created in the Commonwealth's MMARS System.

Step 1. Log into the e*mpac Finance Application with your FIN Username and Password.

Navigate to the following path:

eProcurement → Create Requisition

The ***Create Requisition – Define Requisition*** page opens.



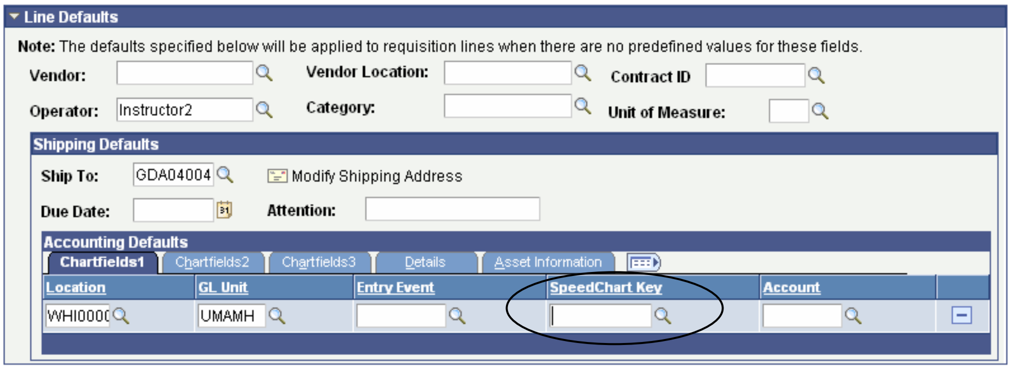
Step 2. Verify the Business Unit and Requestor.

Note: The **Business Unit** and **Requestor** will default based on your user preferences. You should use your campus PO business unit and your logon as the requestor.

Step 3. Enter a ***Requisition Name*** (optional).

Step 4. Click the expansion icon ( ) for the ***Line Defaults*** section.

The ***Line Defaults*** section expands.



Step 5. Verify the ***Operator*** field (User ID defaults in).

Step 6. Click on the look up icon ( ) for the ***SpeedChart Key*** field in the ***Accounting Defaults – Chartfields1*** section.

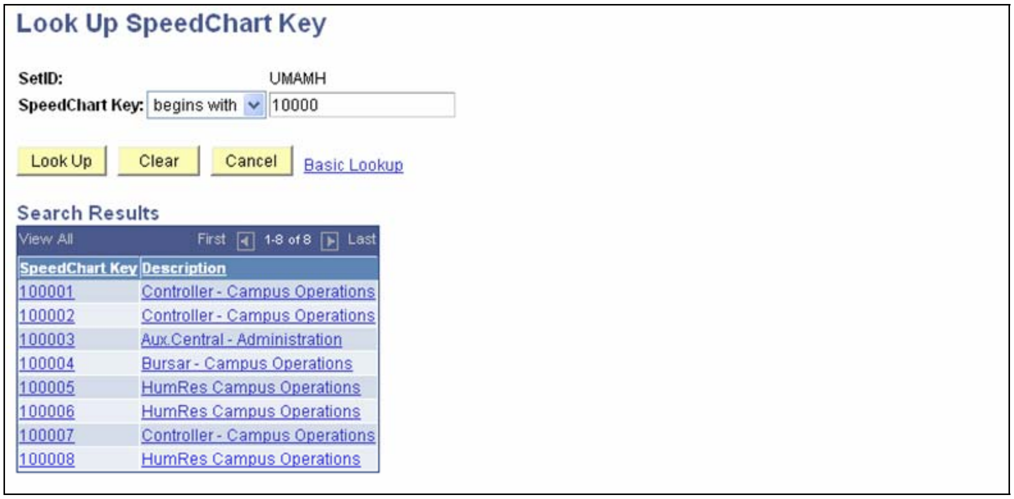
The ***Look Up SpeedChart Key*** page opens.

Step 7. Enter the search criteria in the ***SpeedChart Key*** box.

Note: Please remember that you must use your campus assigned State Fund SpeedChart Key.

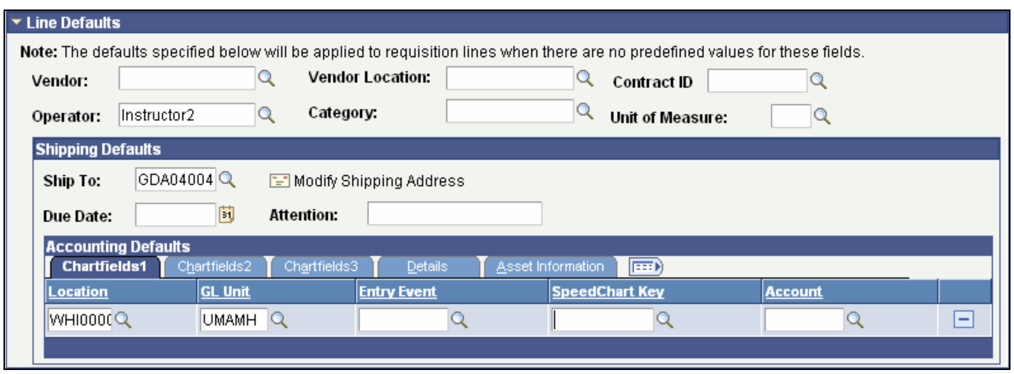
Step 8. Click the Look Up button.

The ***Search Results*** appear.



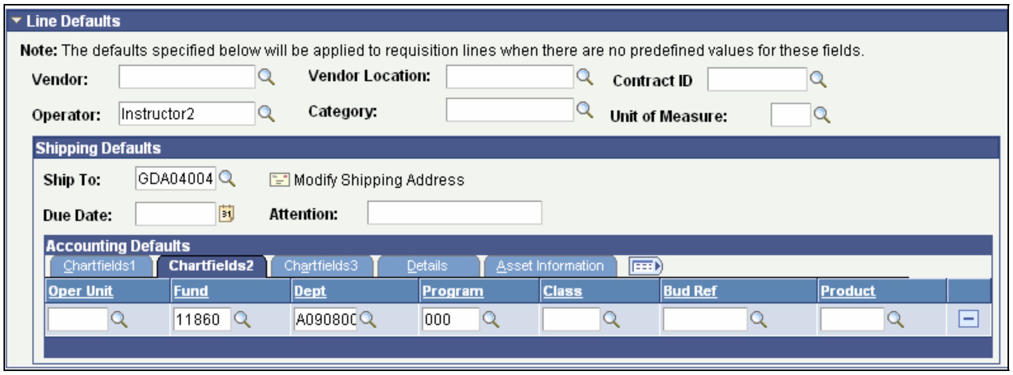
Step 9. Click the appropriate ***SpeedChart Key*** link.

The ***Line Defaults*** section reopens.



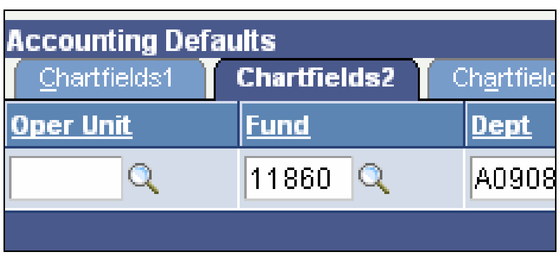
Step 10. Click the Chartfields2 tab in the ***Accounting Defaults*** section.

The ***Accounting Defaults – Chartfields2*** section opens.



Note: The ***SpeedChart Key*** you selected has auto-populated the chartfield information.

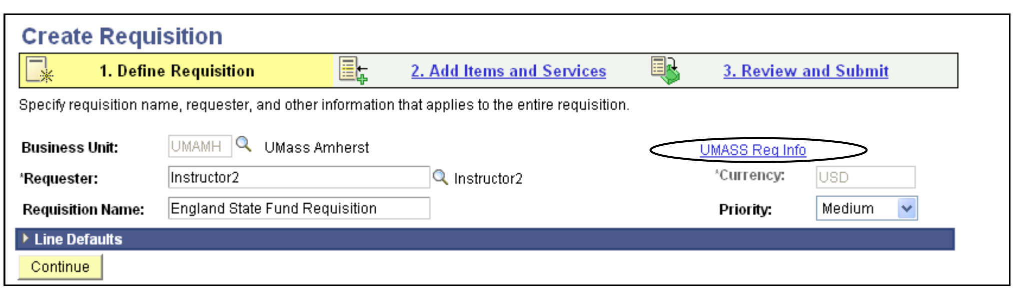
Step 11. View the Fund Code verifying you used a SpeedChart Key associated with a State Fund.



Note: All State ***Fund Codes*** should begin with the number "1."

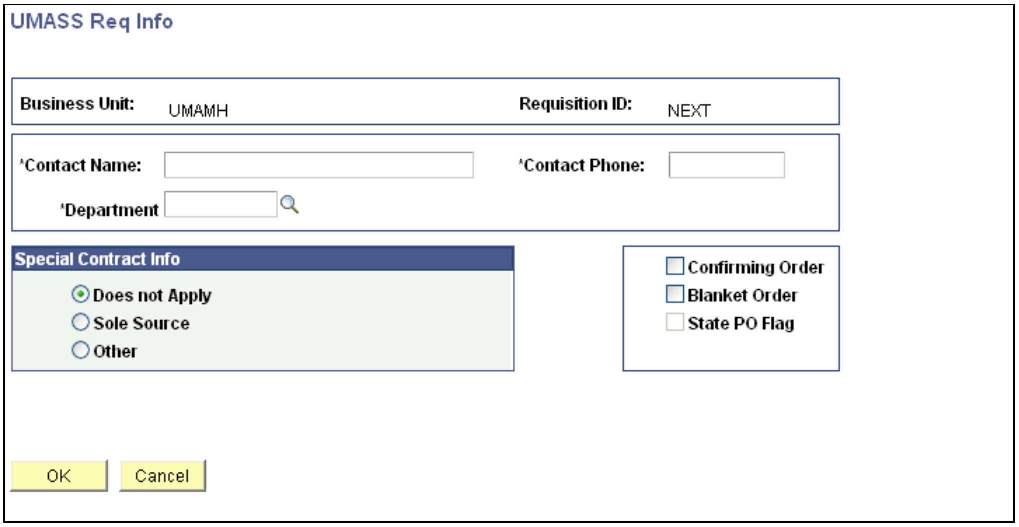
Step 12. Click the collapse icon ( ) for the ***Line Defaults*** section.

The ***Line Defaults*** section collapses.



Step 13. Click the UMASS Req Info link.

The ***UMASS Req Info*** page opens.

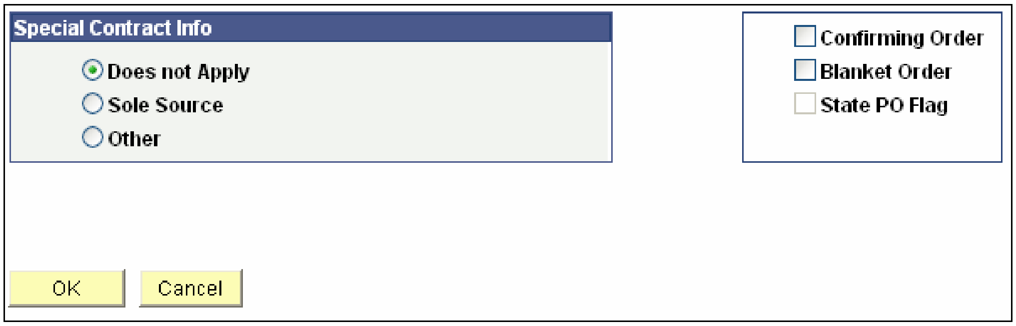


Step 14. Enter the following fields:

- **Contact Name:** **Required**. The specific format is last name, comma (","), first name with no spaces. The field is not case-sensitive.
- **Contact Phone:** **Required**. The specific format is 10-digits, starting with your area code. Use no spaces, formatting, or punctuation.
- **Department:** **Required**. May default based on User ID. If not, then click on the Magnifying Glass and perform a search to locate the description that best identifies the full name of the Contact's department.

Note: Information entered on the ***UMass Req Info*** page applies to **all lines** of the requisition and cannot vary from line to line or vendor to vendor. The ***Contact Name***, ***Contact Phone****, and* ***Department*** fields are transmitted to the vendor.

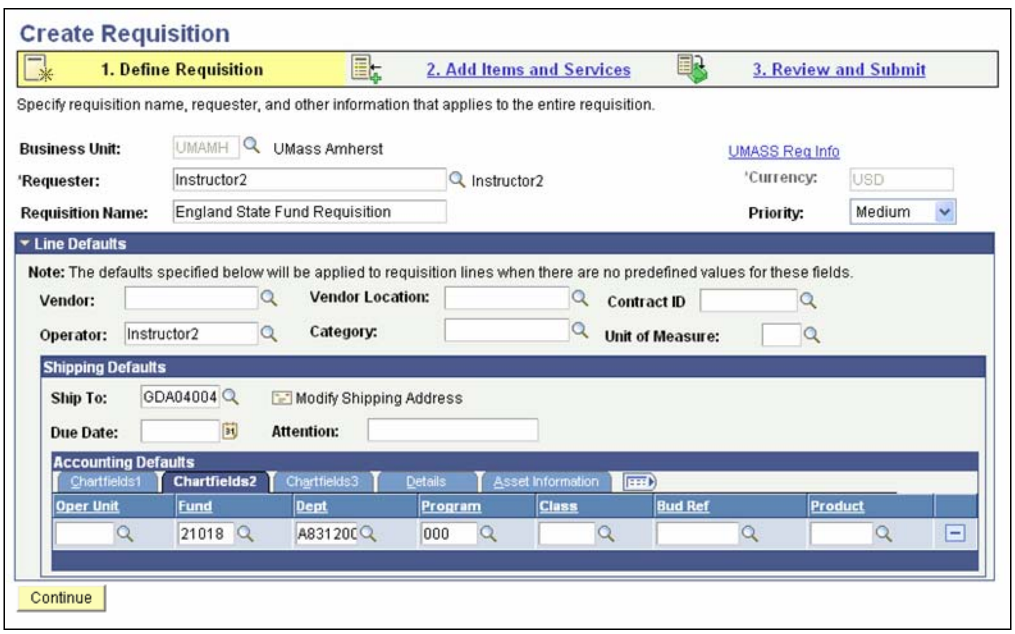
Step 15. Scroll down to the ***Special Contract Info*** section.



Note: None of the options under ***Special Contract Info*** apply to the ***UMass Marketplace***.

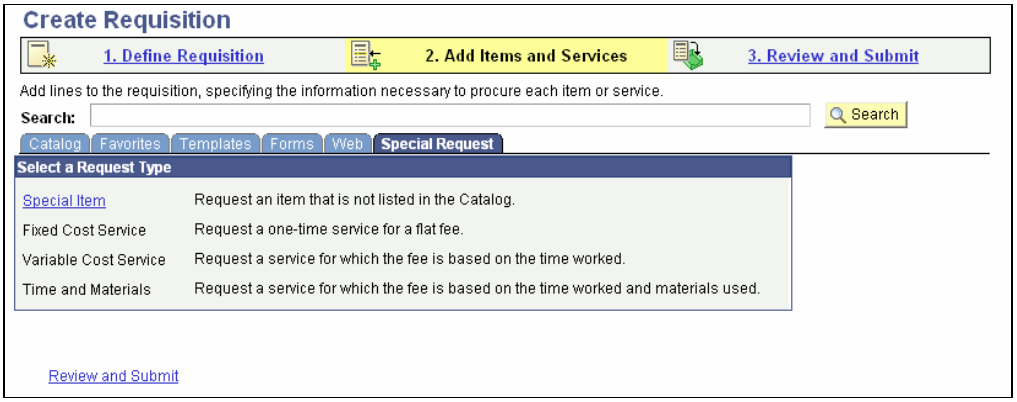
Step 16. Click the OK button.

The ***Create Requisition – Define Requisition*** page reopens.



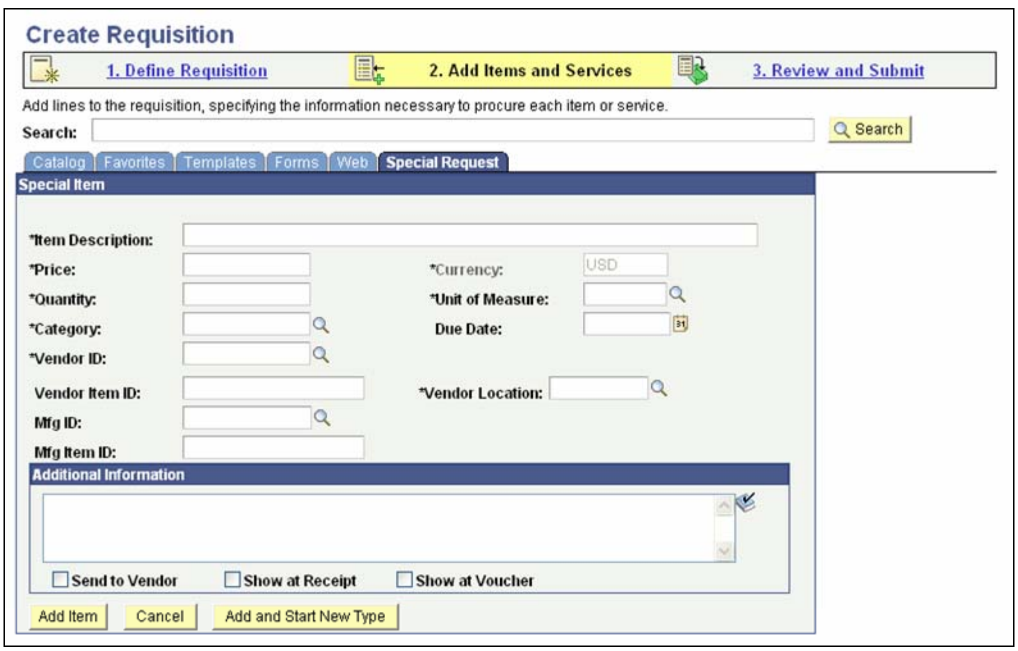
Step 17. Click the Add Items and Services link.

The ***Add Items and Services – Special Request*** page opens.



Step 18. Click the Special Item link.

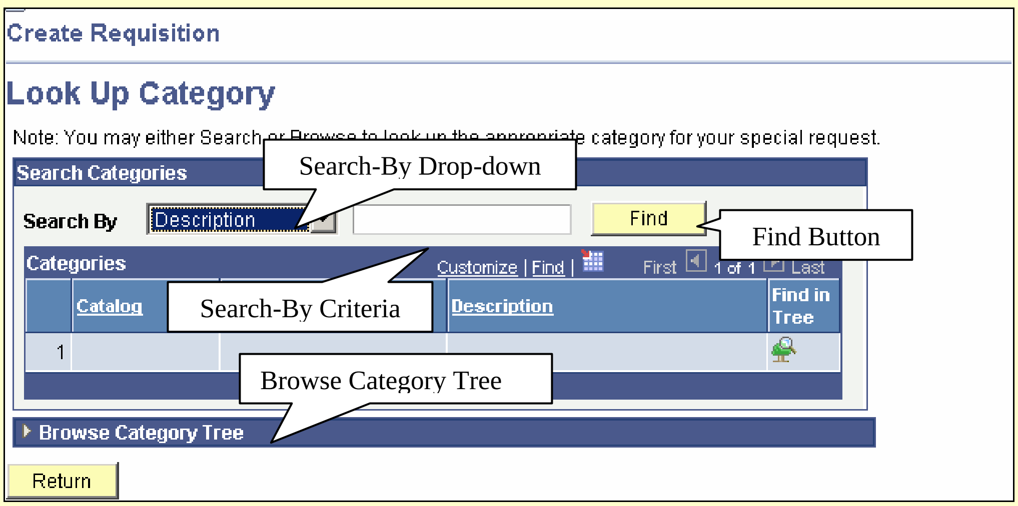
The ***Add Items and Services – Special Request – Special Item*** page opens.



Step 19. Enter the following fields:

- ***Item Description***
- ***Price***
- ***Quantity***
- ***Category***
- ***Unit of Measure***
- ***Additional Information*** (Optional)

Tip: To search for categories, use the look up icon next to the Category field. The ***Look Up Category*** page appears.

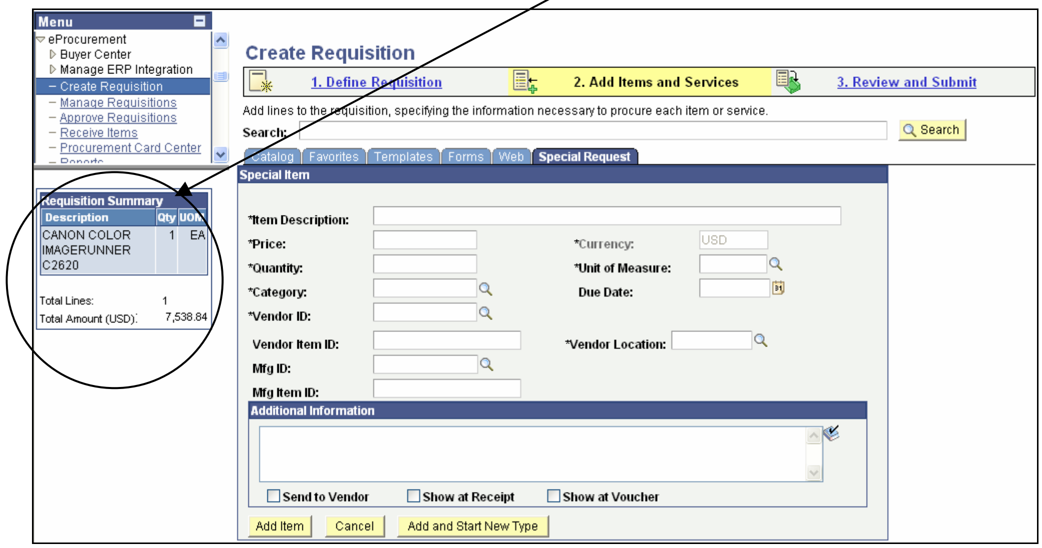


In 8.9, Categories mimic the University's Account Codes and their values. The appropriate category and account code for this service must be assigned.

You can use the ***Search By*** box or expand the ***Browse Category Tree***, to view the list of categories.

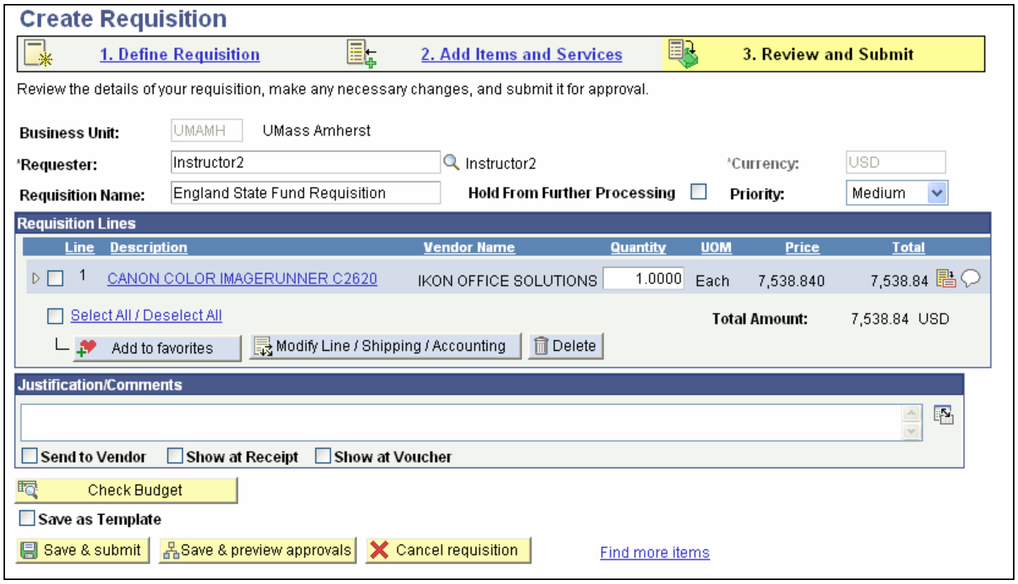
Step 20. Click the Add Item button.

The ***Add Items and Services – Special Request – Special Items*** page refreshes with a new blank page. The ***Requisition Summary*** on the left shows the description, quantity, and amount for the line.



Step 21. Click the Review and Submit link.

The ***Create Requisition – Review and Submit*** page opens.



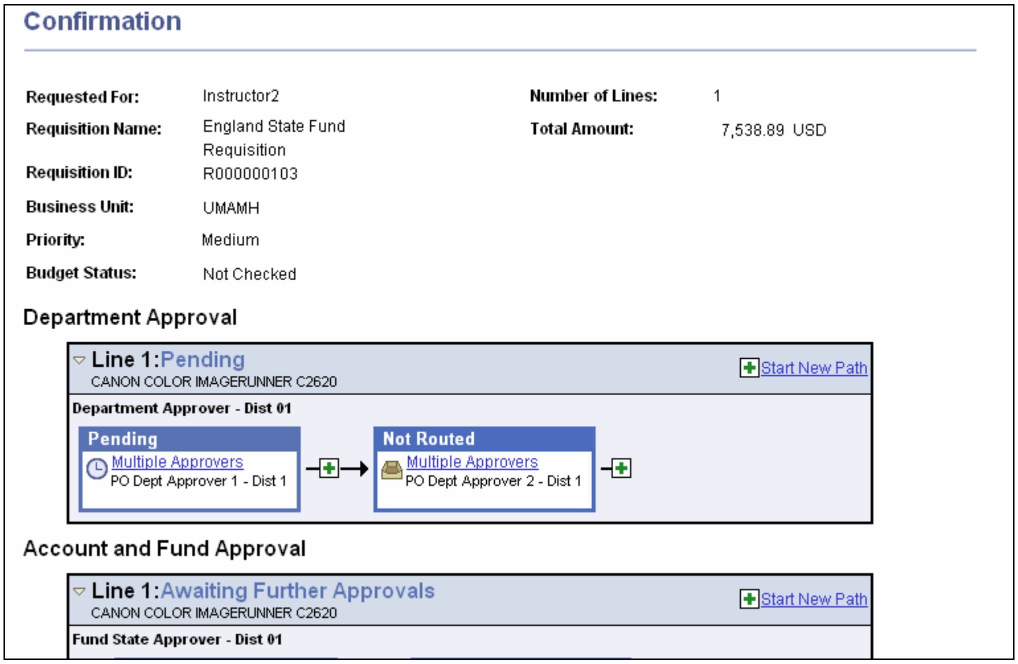
Note: The Requisition ***Line*** is available for editing. You can click on the Select All / Deselect All link to select the item and click the Modify Line / Shipping / Accounting button to make any modification to the chartfields.

You can also save the requisition in the "Open" status by clicking the Save & preview approvals button. Remember that this will stop the requisition from entering workflow and in order for the requisition to be approved, you must remember to initiate workflow.

Step 22. Click the Save & submit button at the bottom of the page.

"Processing" appears in the top right corner of the page.

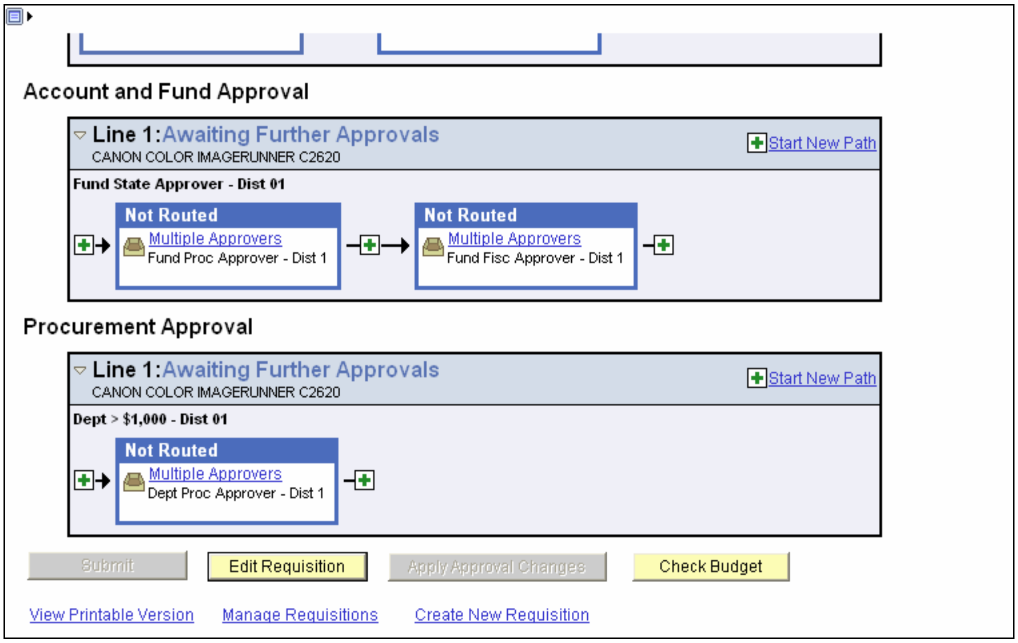
The ***Confirmation*** page opens.



Note: You can scroll down to view all Approval levels for the requisition. The Requisition ID has been generated.

Step 23. Note the ***Requisition ID***: ______________________.

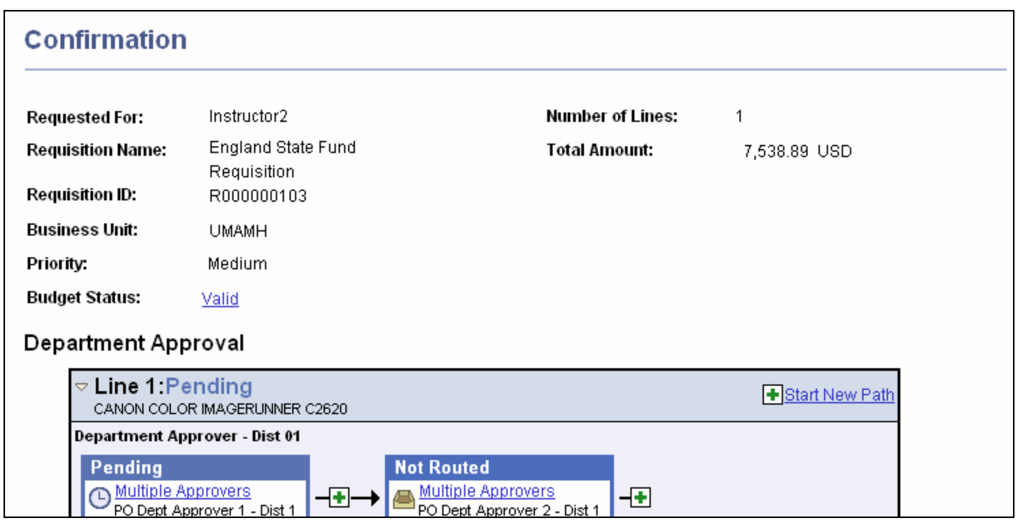
Step 24. Scroll down to the bottom of the page.



Step 25. Click the Check Budget button.

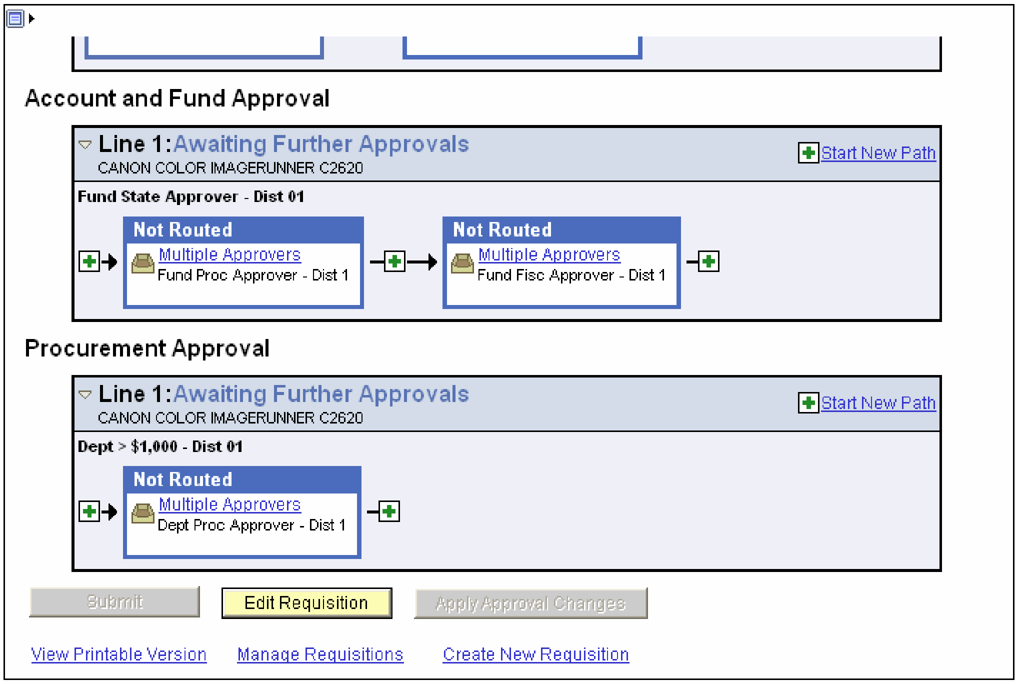
"Processing" appears.

The ***Confirmation*** page refreshes.



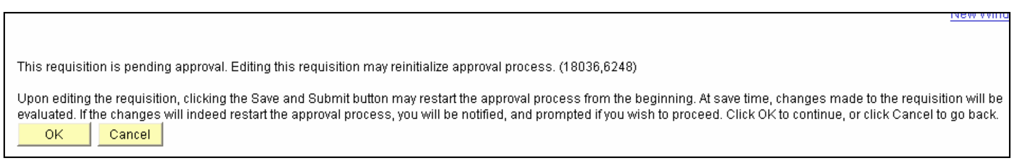
Note: The ***Budget Status*** reads "Valid."

Step 26. Scroll down to the bottom of the page.



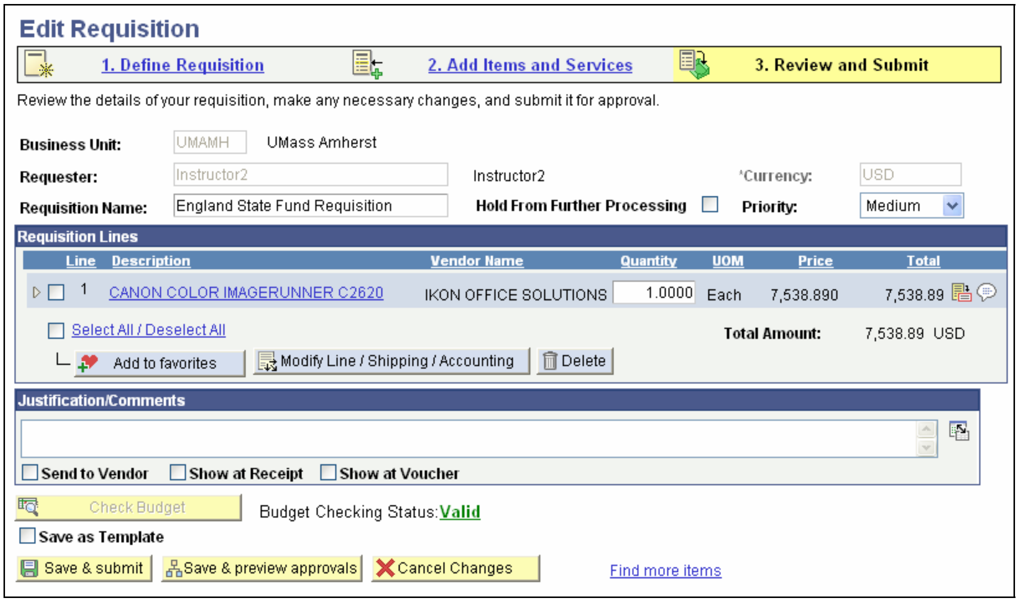
Step 27. Click the **Edit Requisition** button.

A warning message appears.



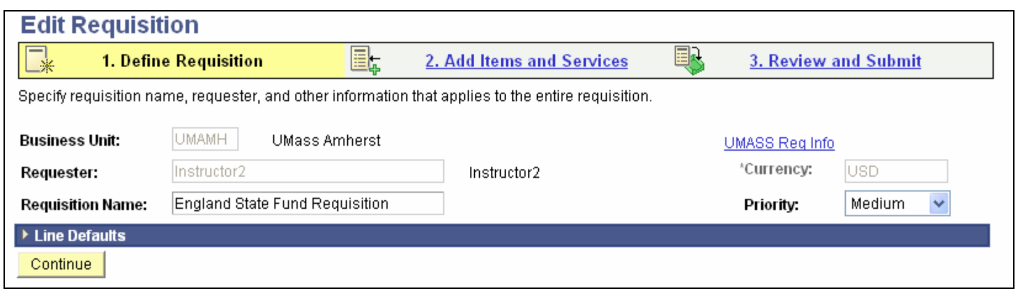
Step 28. Click the OK button.

The ***Edit Requisition – Review and Submit*** page opens.



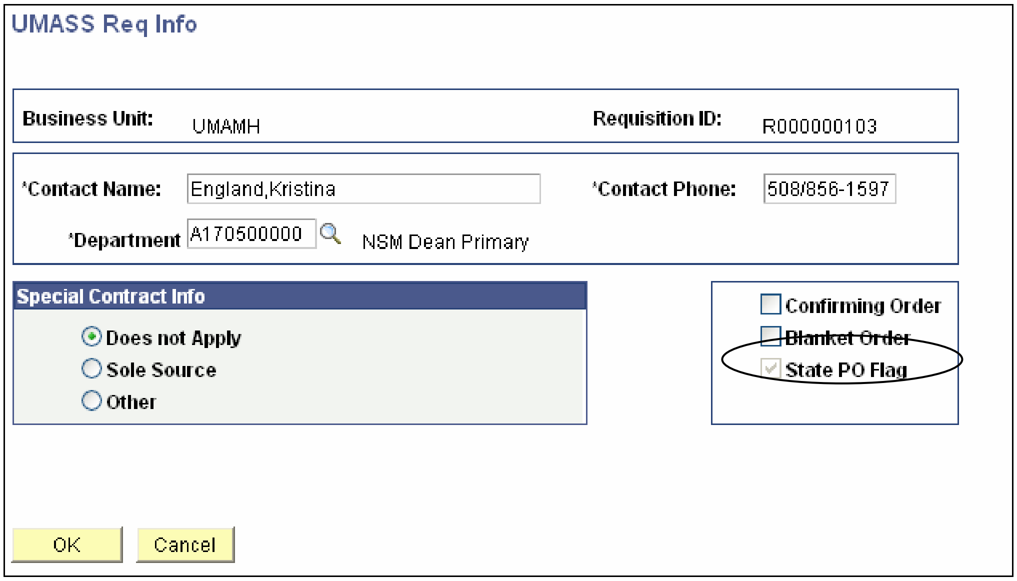
Step 29. Click on the Define Requisition link.

The ***Edit Requisition – Define Requisition*** page opens.



Step 30. Click on the UMASS Req Info link.

The ***UMASS Req Info*** page opens.



Note: The ***State PO Flag*** checkbox defaults as selected. This is an automatic default set up in the system for any requisition with a State Fund Code. You cannot change the default.

END OF JOB AID

Last Edited Date	**3/13/2007**
Last Edited By	**Kristina England**