



Procurement

Oracle Procurement Step-by-Step Guide

Set Requisition Preferences

January 29, 2021

FINAL

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Set Requisition Preferences

UC Merced employees will use these steps to set requisition preferences. Setting requisition preferences creates information value defaults for the data points specified when requisitions are created. The defaulting of data reduces data entry time (fewer keystrokes) while streamlining the requisition entry process.

For each requisition created, one must first review and edit, if necessary, their requisition preferences. Requisition preferences are changed to ensure new requisitions have the correct POETAF values defaulted where applicable, or to create an additional **Favorite Charge Account (CoA String)** values.

- ***Deliver-to Location:** First, select the Deliver-to Location. The Deliver-to Location is the physical address to where the products or services will be shipped. As the requisitioner, select from the list of addresses in the search results by clicking the magnifying glass icon.
 - **Note:** Do **not** choose the UCM-DCC location, this is not a valid Deliver-to location.
- **Destination Type:** Next, select the Destination Type. The Destination Type defines the type of purchase. When submitting a requisition, the Destination Type will always be the default value of Expense.
- **Billing (Projects):** Under Billing, enter the project accounting information, if it is a project-based order. If the requisition is project-based, you must include the project details, or POETAF, to ensure correct billing. Once the Project Number is entered, the other Projects fields will be enabled for you to select the correct details.
- **Billing (Favorite Charge Accounts):** For non-project requisitions, add the appropriate charge account, or CoA string, using the plus icon under Favorite Charge Accounts. You can also add accounts to your Favorite Charge Accounts to quickly access those you commonly use.

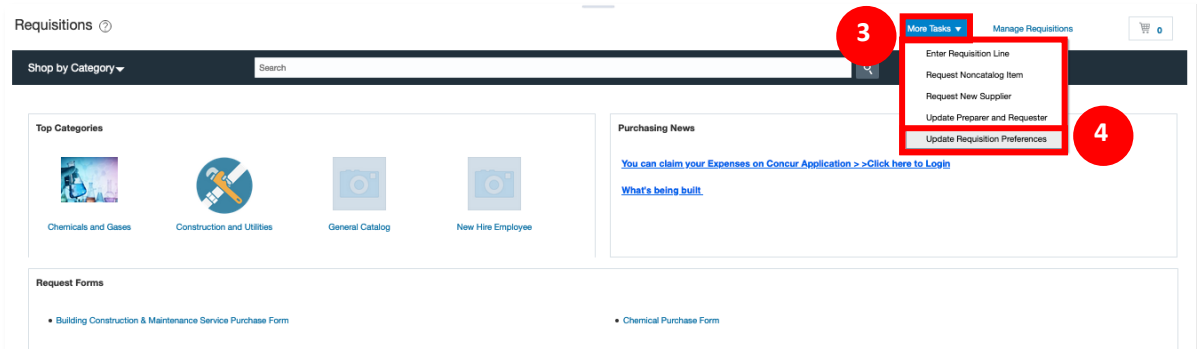
To perform this task, log into Oracle Cloud

System Steps:

1. Click the **Procurement** infolet
2. Click the **Purchase Requisitions** sub-infolet



3. Click the **More Tasks** drop-down menu
4. Select **Update Requisition Preferences** option



5. In the **Shipping and Delivery** section of the **Edit Requisition Preferences** pop-up window, enter the following information as required (***mandatory** data fields are indicated by an asterisk):
 - a. ***Requester:** defaults to logged in user's name, but one can enter a desired value, or select the value using the search feature if needed
 - b. ***Deliver-to Location:** enter the desired value, or select the value using the search feature if needed.

Note: Do **not** choose the UCM-DCC location, this is not a valid Deliver-to location.

 - c. **Destination Type:** select the desired value from the drop-down menu if different from the default value. Defaults to Expense, leave as is.
6. In the **Billing: Projects** section of the **Edit Requisition Preferences** pop-up window, enter preferred POET **only** when creating project related requisitions – these account selections will take precedence as preferred accounts (***mandatory** data fields are indicated by an asterisk):

Note: entering populating the **Billing: Projects** information will make this information default into requisitions

- a. **Project Number:** enter the desired value, or select the value using the search feature if needed
 - b. ***Task Number:** enter the desired value, or select the value using the search feature if needed
 - c. ***Expenditure Type:** select the desired value from the drop-down menu if different from the default value
 - d. ***Expenditure Organization:** select the desired value from the drop-down menu if different from the default value
 - e. ***Contract Number:** select the desired value from the drop-down menu if different from the default value
 - f. ***Funding Source:** select the desired value from the drop-down menu if different from the default value
7. In the **Favorite Charge Accounts** section of the **Edit Requisition Preferences** pop-up window, click the **Create** icon
- a. To create additional **Favorite Chart Accounts** values, click the **Create** icon (+) and follow the steps indicated in **step #8 below**
8. Enter the following information as required (***mandatory** data fields are indicated by an asterisk):
- a. ***Nickname:** enter the desired value - **Favorite Chart Accounts Nicknames** can be added ('+' icon), updated or deleted ('x' icon) as needed.
 - i. Users can use the ***Nickname** in the requisition to assign a different preferred account to any requisition line where the primary account needs to be replaced
 - b. **Primary:** if more than one **Favorite Chart Accounts** values exists, make sure to indicate which one is the **Primary** by clicking the **Set Primary** icon to enable that attribute. The primary will populate on every line item in the requisition during creation.
 - i. Users should change the **Primary** flag each time they begin requisition creation, making **Primary** the account they want to assign to all or most of the lines in the requisition, minimizing need for manual updates in the requisition
 - c. ***Charge Account:** enter the desired value, or select the chart string segment values using the search and select feature for each chart string segment value if needed. The search function will give you all available segment options based upon previous line entries.
 - i. The **Natural Account field** in the preference **will be overwritten** depending on the **PO Category assigned in each line**, and this segment value can only be modified through modification of the PO Category assigned to the line.

Note: you can use the “Enter a CoA Chartstring or Project Details POET POETAF_Step By Step Guide.pdf” for more detailed instruction on using the search and select feature to enter chart string segment values if needed.

9. Click the **Save and Close** button once all **Favorite Chart Accounts** values have been entered

Edit Requisition Preferences
Requisitioning BU UCM Business Unit

Shipping and Delivery (5)

* Requester Fininst1
* Deliver-to Location UC Merced Central Receiving
Destination Type Expense

Billing (6)

Projects

Project Number GNT0000005
* Task Number Public Service CAP KC
* Expenditure Type 500000-S&W ACADEMIC SEI
* Expenditure Organization M365000-HEALTH SERVICES
* Contract Number TAEP2019-C4
* Funding Source U.S. ARMY RESEARCH LAB

Favorite Charge Accounts (7)

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	Q1	1011-20001-M250000-530104-62	<input type="checkbox"/>
<input checked="" type="checkbox"/>	PRJ 2020	1011-19900-M250000-532101-44	<input type="checkbox"/>

Save and Close (9)