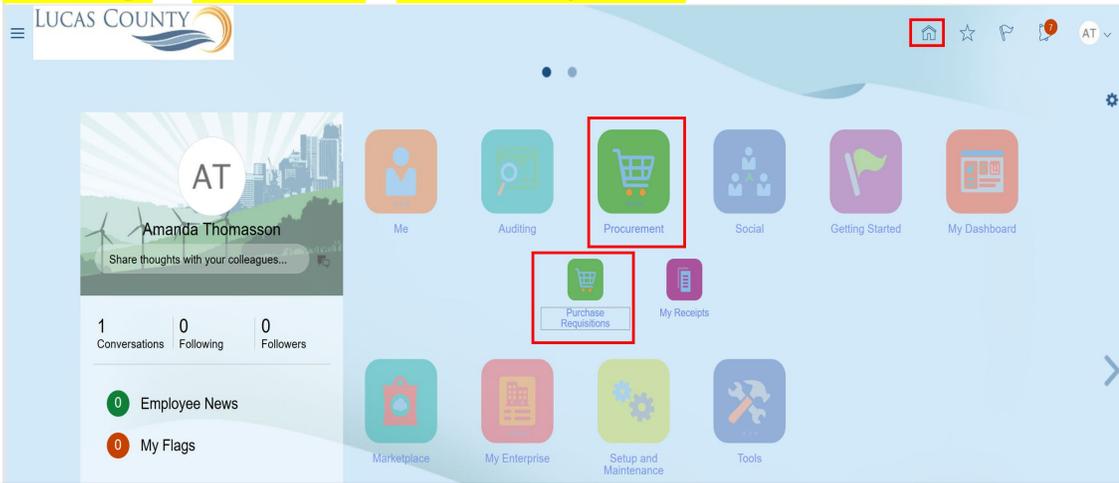
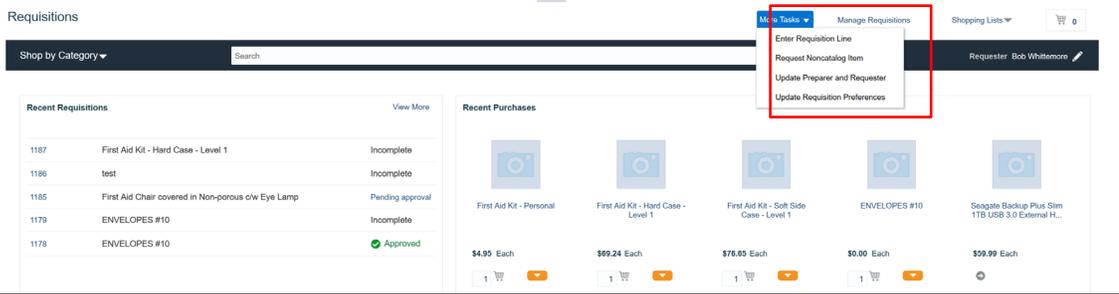


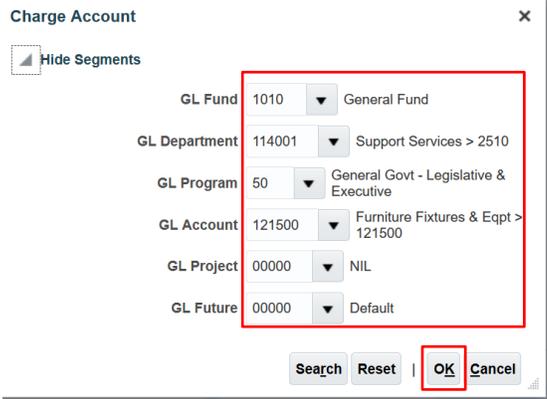
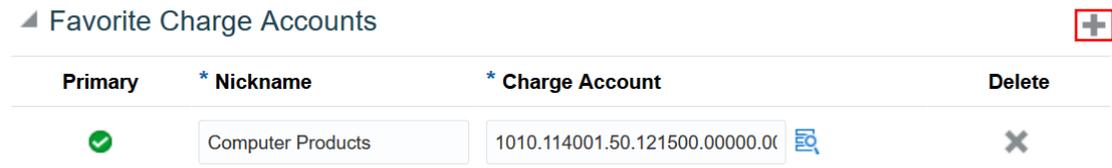
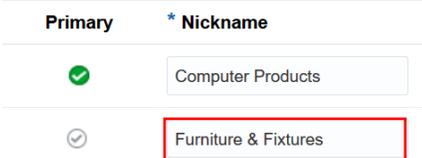
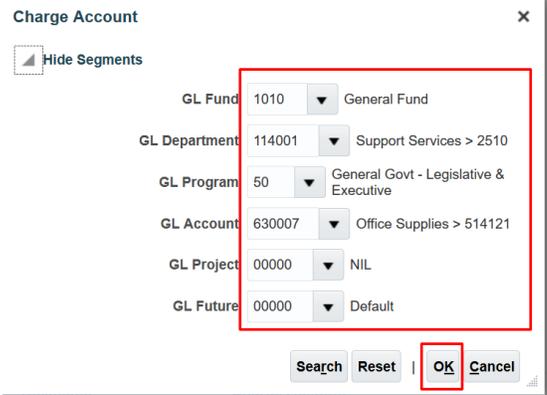
Set Requisition Preferences - Multiple Accounts

Audience: Requesters

Purpose: This job aid will provide guidance in setting up preferences to allow for ease of purchase requisition process.

Step	Action
1	<p>Log into Oracle. Home Page -> Procurement > Purchase Requisitions</p> 
2	<p>Click the More Task button and select Update Requisition Preferences.</p> 
3	<p>Under the Favorite Charge Accounts click the Add Row button. The '+' icon represents adding a row.</p>

	<p>Edit Requisition Preferences</p> <p>Requisitioning BU Lucas County</p> <p>▲ Shipping and Delivery</p> <p>* Requester Chapa, Jessica <input type="text"/></p> <p>* Deliver-to Location Support Services <input type="text"/></p> <p>Destination Type Expense <input type="text"/></p> <p>▲ Billing</p> <p>▲ Projects</p> <p>Project Number <input type="text"/></p> <p>Task Number</p> <p>Expenditure Type</p> <p>Expenditure Organization</p> <p>▲ Favorite Charge Accounts +</p> <table border="1"> <thead> <tr> <th>Primary</th> <th>* Nickname</th> <th>* Charge Account</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Primary	* Nickname	* Charge Account	Delete				
Primary	* Nickname	* Charge Account	Delete						
4	<p>Click in the *Nickname field. Requesters can enter multiple Charge Accounts with identifying Nicknames if they normally use more than one account to charge requisition lines to. One account must be identified as the default primary (Tick Mark) account.</p>								
5	<p>Enter information into the *Nickname field.</p> <p>▲ Favorite Charge Accounts</p> <table border="1"> <thead> <tr> <th>Primary</th> <th>* Nickname</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Computer Products</td> </tr> </tbody> </table>	Primary	* Nickname	<input checked="" type="checkbox"/>	Computer Products				
Primary	* Nickname								
<input checked="" type="checkbox"/>	Computer Products								
6	<p>Click the *Charge Account List of values button. Select the default charge account values that will default into the Requisition.</p> <p>* Charge Account</p> <table border="1"> <tbody> <tr> <td><input type="text"/></td> <td><input type="button" value="List of values"/></td> </tr> </tbody> </table>	<input type="text"/>	<input type="button" value="List of values"/>						
<input type="text"/>	<input type="button" value="List of values"/>								

	
7	Click the OK button.
8	<p>Click the Add Row button. The '+' icon represents adding a row.</p> 
9	Click in the *Nickname field.
10	<p>Enter information into the *Nickname field.</p> 
11	<p>Click the *Charge Account List of values button. The Requester can click on the drop-down list and search for value for each of the specific account segments.</p> 
12	Click the OK button.
13	Click the Nickname field to select the row that will be the primary Charge Account.
14	Click the Actions menu.
15	Click on Set Primary .

Favorite Charge Accounts +

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	Computer Products	1010.114001.50.121500.00000.00	✕
<input checked="" type="checkbox"/>	Furniture & Fixtures	1010.114001.50.630007.00000.00	✕

Set Primary

Save and Close
Cancel

16 Click the **Save and Close** button.

17 To view how the default values, fill in, click the **More Tasks > Enter Requisition Line** link.

Notice that **Deliver-to-Location** and **Primary Charge Account** are defaulted in the new requisition based on the preferences.

More Tasks Manage Requisitions

- Enter Requisition Line
- Request Noncatalog Item
- Update Preparer and Requester
- Update Requisition Preferences

Enter Requisition Line Add to Cart Done 0

* Line Type: Goods

Item:

Revision:

* Item Description:

* Category Name:

* Quantity: 1

* UOM Name:

* Price:

* Currency: USD

Source Type: Supplier

Agreement:

New supplier

Supplier:

Supplier Site:

Supplier Contact:

Phone:

Fax:

Email:

Supplier Item:

Delivery

* Requester: Chapa, Jessica

Requested Delivery Date: 8/7/19

Suggested Buyer:

Billing

View Format Freeze Detach Wrap

Project Costing Details

Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields LCCSB Tracking Code	Delete
					1010.114001.50.121500.00000.00	7/31/19	100	1		Not reserved		✕
Total									100	1		