

## EP.010.050 – CREATING REQUESTERS

<b>Purpose</b>	<ul style="list-style-type: none"> <li>To create a Requester</li> <li>To understand what attributes are associated with a Requester</li> </ul>
<b>Description</b>	<p>A Requester is a user with a security role and preferences which allows him/her to create requisitions in the system.</p> <p>When the Requester is created, specific attributes are associated to that Requester, such as the Business Unit, Department, Accounting Information, and Catalog Information. Once a Requester is created, the status defaults to Active but can be changed to Inactive if necessary.</p>
<b>Security Role</b>	<b>BOR_PO_SETUP_CONFIG</b>
<b>Dependencies/ Constraints</b>	Security Administrators need to set up the Requester's role and preferences.
<b>Additional Information</b>	None

## Procedure

Below are step by step instructions on how to create a Requester.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Set Up Financials/Supply Chain</b> link.
4.	Click the <b>Product Related</b> link.
5.	Click the <b>Procurement Options</b> link.
6.	Click the <b>Purchasing</b> link.
7.	Click the <b>Requester Setup</b> link.
8.	Click the <b>Add a New Value</b> tab.
9.	Enter the Requester's User ID in the <b>Requester</b> field.
10.	Click the <b>Add</b> button. The system navigates to the Requester Setup page.
11.	Verify the Requester status dropdown menu defaults to Active the first time the user is established as a Requester.  <i><b>Note:</b> If at a later date a Requester should be Inactivated, follow the same navigation but using the dropdown arrow, select Inactive and click Save.</i>
12.	Enter the institution's SetID in the <b>ShipTo SetID</b> field.
13.	Enter the <b>Ship To</b> ID. This value defaults on the requisition.  <i><b>Note:</b> This field is not required. If a Requester will be creating requisitions for more than one Ship To, leave this field blank. However, if a Requester will be creating requisitions frequently with the same Ship To that information can be entered in this field.</i>
14.	Enter the institution's SetID in the <b>Location SetID</b> field. This value defaults on the requisition.
15.	Enter the <b>Location</b> code.
16.	Enter " <b>SHARE</b> " in the <b>PO Origin SetID</b> field.  <i><b>Note:</b> All USG Institutions use the SHARE SetID for PO Origin.</i>
17.	Enter " <b>ONL</b> " the <b>Origin</b> field.

Step	Action
18.	Select the appropriate Requisition Status from the following: <ul style="list-style-type: none"> <li>• Open: Requisition has been entered and saved, but it has not yet been submitted for approval.</li> <li>• Pending Approval: Requisitions has been submitted and is awaiting approval.</li> </ul>
19.	Enter “ <b>USD</b> ” the <b>Currency</b> field.
20.	Enter Phone number of Requester
21.	Enter Fax number of Requester
22.	Override Auto Item Substitute – not applicable, leave unchecked
23.	Use Only Assigned Catalogs – recommend leaving unchecked
24.	Consolidate with other Reqs – leave unchecked
25.	Price Can Be Changed on Order – recommend checking
26.	Defaults Inventory BU – not applicable leave, unchecked
27.	On the ChartFields tab, enter the <b>GL Unit</b> .  <i><b>Note:</b> Chartfield information entered here defaults onto the requisition when one is created.</i>
28.	Leave the Account field blank. The Account field defaults from what is defined on the NIGP/Category code used on the transaction.
29.	Enter the <b>Fund</b> information, if needed.
30.	Enter the <b>Dept</b> information, if needed.
31.	Enter the <b>Program</b> information, if needed.
32.	Enter the <b>Class</b> information, if needed.
33.	Enter the <b>Project</b> information, if needed.
34.	Enter the <b>BUD REF</b> information.  <i><b>Note:</b> the BUD REF should be updated each fiscal year. For more information, see <a href="#">EP.080.070 – Updating BUD REF for All Requesters at Year End</a>.</i>
35.	In the Catalog Information section, select the <b>Default</b> checkbox.
36.	Enter “ <b>SHARE</b> ” in the <b>SetID</b> field.  <i><b>Note:</b> Catalog information is centrally maintained and is standard across all USG institutions.</i>

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Step	Action
37.	Enter " <b>NIGP_TREE</b> " in the <b>Catalog ID</b> field.
38.	Click the <b>Save</b> button.