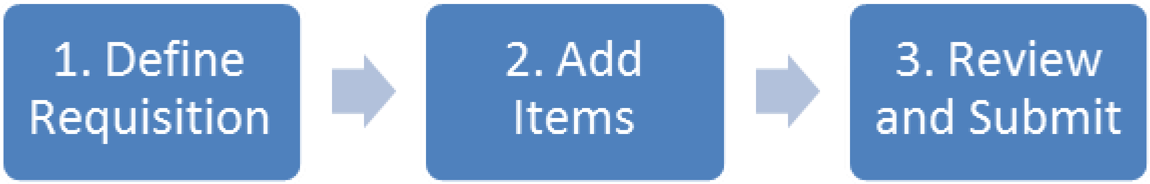
Requisitions and Natural Accounts

There are three steps to creating a requisition. These steps correlate to the three pages that can be found on the Create Requisition page in ARC:



Each one of these pages serves a different function in creating a requisition and houses a variety of information relevant to the request you are creating. This job aid will detail each page you will complete when creating a requisition:

1. Define Requisition

This page allows you to enter the **default** information that will be **assigned to all the items** on the requisition. This page is merely a time saving tool and is not the actual transaction page.

The Define Requisition page will allow the requestor to enter the following DEFAULT information:

1. Vendor
2. Ship-to and One-time Shipping Address
3. Bill-to Address
4. Category Code
5. Unit of Measure
6. Chartfield information

The purpose of this page is to make the job of the requester easier. For example: if you have 100 lines to enter and all of them need to use the same default, you only need to enter the information once on the Define Requisition page.

Note: It is best practice to not enter anything in the Account field on the Define Requisition page. If you enter an Account on the Define Requisition page, it will override any Account that is entered on the Review & Submit page. See additional details in the Review & Submit section of this job aid.

2. Add Items and Services

This is the second step on a requisition and involves adding the items (goods or services) to the requisition. If previously entered on the Define Requisition page, the following information will be defaulted to the item during the data entry process:

1. Category Code
2. Unit of Measure

3. Review & Submit

The main purpose of this page is to give an opportunity for the requester to review all the information for their order prior to saving and submitting it for approval. That's why anything pertaining to your order can be seen on this page (Header, Line, Ship, and Chartfield information).

You will notice that even if you have not input an Account value on the Define Requistion page, an Account will appear on the Review and Submit page. This is because **the Account code will default based on the Category Code** entered on the requisition.

If, however, during the review process, the requestor does not believe this to be the most appropriate Account code, he/she can override the default account code from this page. This must be done from the Review & Submit page. Again, the Account field on the Define Requisition page should be left blank unless the Account is the same for all line items on the requisition. The Review & Submit page is also where you can enter a SpeedChart for a particular line item.

The Account and SpeedChart fields can be found by clicking the arrow icon (>) and expanding the line details. Note that the Account was defaulted from the Category Code, as no Distribution Line information was entered on the Define Requistion page. If the defaulted Account is incorrect, you can manually enter the appropriate Account Code in the field highlighted below.