
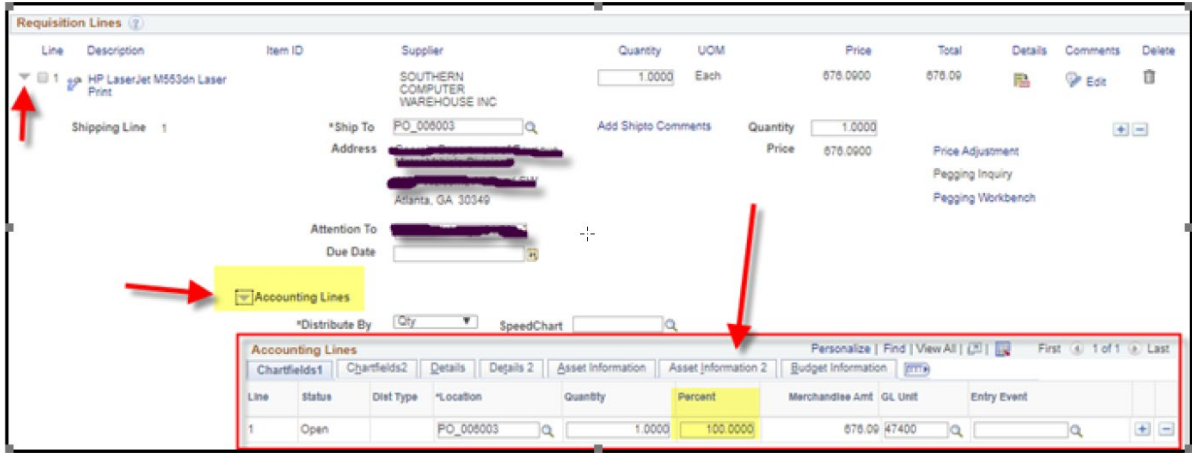
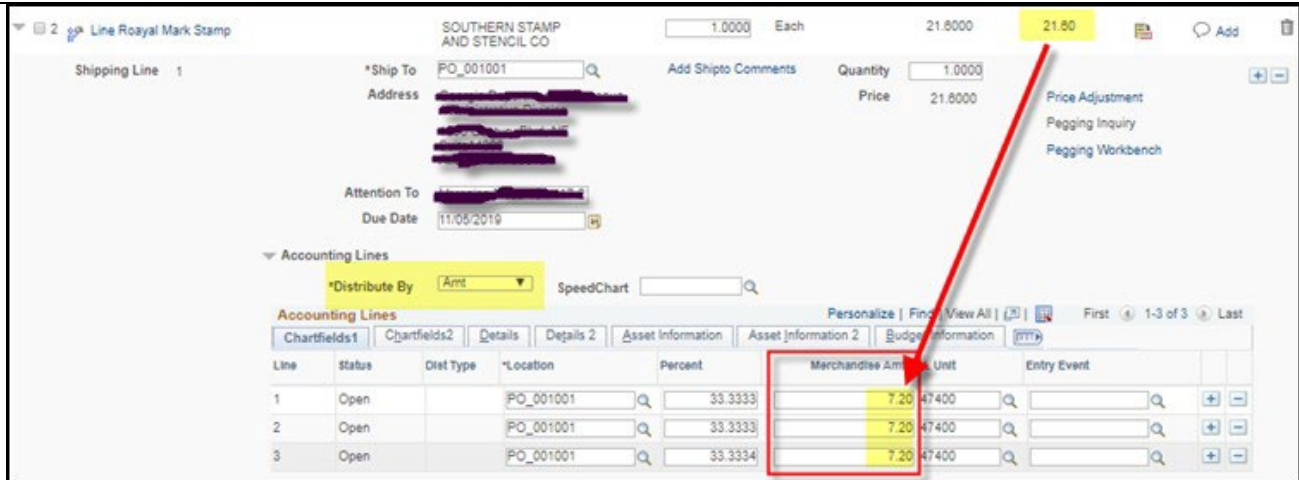


9.2.38 eProcurement: Allocate Req Line by Amount using the Distribute by Amount Option. Quick Reference Guide

Use this guide to understand how to split a req line distribution by amount. The req line can be allocated by amount per the chartfield of choice, individually or via mass change. The total amount of lines cannot exceed the scheduled req line amount or 100%.

Step	Description
1.	Sign into PeopleSoft
2.	<p>Create a new ePro Requisition using either of the following navigation options:</p> <p>Use Home Page Tiles: Click on the Procurement tile, then select eProcurement > Requisition OR</p> <p>Use NavBar: Click NavBar icon , Click Navigator option, then Select eProcurement > Requisition</p>
3.	<p>a) Review the pre-populated (Requester default) values on the Requisition Settings page.</p> <p>b) Decide to either accept the “Default” values as defined or “Override” the defaults on this page.</p> <p>c) Make changes if using the Override defaults option, otherwise click “OK” and proceed with creating your requisition.</p> <p>Expand the requisition line you want to split individually.</p> <ul style="list-style-type: none"> Click on the triangle next to the line number followed by the one next to the Accounting Lines. 
4.	<p>First adjust the existing line that is defaulted to 100% with one of the desired amounts or percentages.</p> <p>Add additional lines to split the amounts so they round up to the total scheduled line amount. The system will automatically calculate the percentages for you so it rounds up to 100%. You may also allocate by percentages but the total must add up to 100%.</p>

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Screenshot of the eProcurement system showing a requisition line for "Line Royal Mark Stamp" with a total amount of 21,800. The "Distribute By" dropdown is set to "Amt". Below, the "Accounting Lines" table shows three lines with a 33.3333% split and a merchandise amount of 7,200 each. A red arrow points from the total amount "21,800" to the "7,200" values in the table.

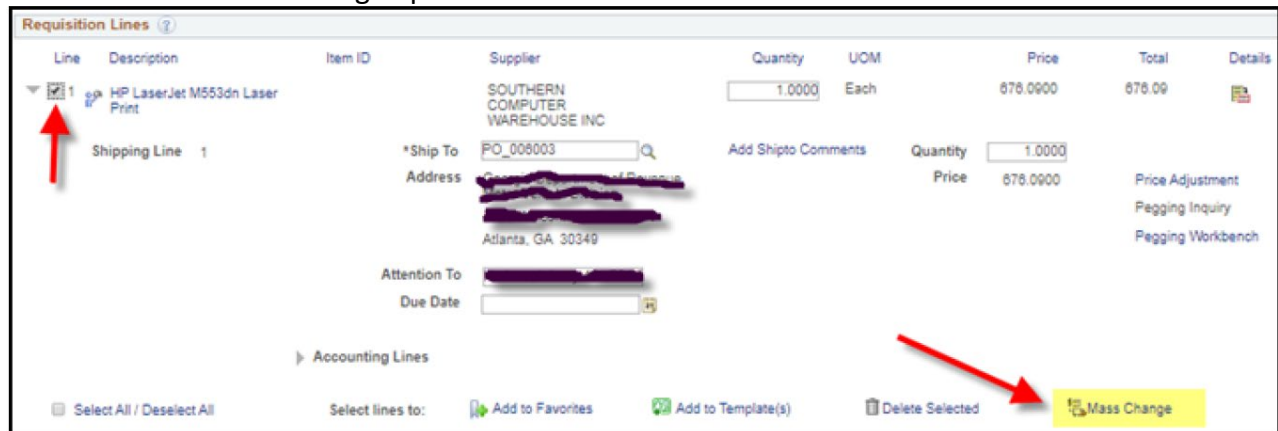
Line	Status	Dist Type	*Location	Percent	Merchandise Am	Unit	Entry Event
1	Open		PO_001001	33.3333	7.20	47400	
2	Open		PO_001001	33.3333	7.20	47400	
3	Open		PO_001001	33.3334	7.20	47400	

Click on the Chartfields2 tab and update the relevant chartfields to split by fund, department, class, program, etc.

- If 2 or more lines already exist on the requisition before splitting, delete all the lines except 1. Update the percentage to 100 and start over brand new.

5. **Select the req line you want to split using Mass Change.**

- Click on the Mass change option.



Screenshot of the "Requisition Lines" screen showing a requisition line for "HP LaserJet M553dn Laser Print" with a total amount of 676.00. A red arrow points to the "Mass Change" button at the bottom right.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	HP LaserJet M553dn Laser Print		SOUTHERN COMPUTER WAREHOUSE INC	1.0000	Each	676.0000	676.00	

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Edit Lines/Shipping/Accounting for Selected Lines

Line Information [?](#)

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Supplier Location

Buyer Category

Shipping Information

Ship To Location

Due Date Attention

Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | | First 1-3 of 3 Last

Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Fund Src	Program
1	33.3300	<input type="text"/> <input type="button" value="Q"/>	47400 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	10100 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>
2	33.3300	<input type="text"/> <input type="button" value="Q"/>	47400 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	10101 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>
3	33.3400	<input type="text"/> <input type="button" value="Q"/>	47400 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	10102 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

[Load Values From Defaults](#)

OK Cancel

- Split the lines by percentage from the mass page screen, not to exceed 100%. You can only split by percentages on this page. **Use Excel to derive the percentages if using amount values and round to 2 decimal places.**
- You only need to provide the chartfield values you are changing here.
- Click OK when done.

Distribution Change Options Help

For the selected requisition lines that are available for sourcing, apply distribution changes to

Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

- Replace all existing lines and Click OK.
- Review to make sure the distribution displays as expected.
- Save and Submit the requisition for approval.