



9.2.38 eProcurement: Using the Requisition Settings Page for Defaults Quick Reference Guide


Use this guide to understand how to utilize the Requisition Settings page when creating an eProcurement Requisition. This guide will explain how this page can be used to define default values and apply them successfully to all requisition lines, schedules, and distribution lines.

Key points to understand about the Requisition Settings page:

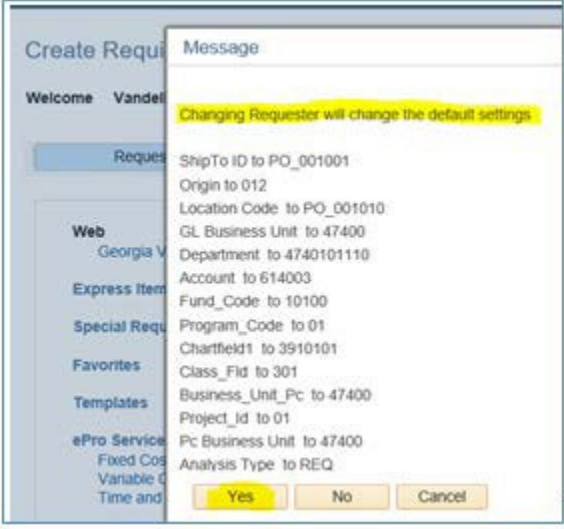
- This page works exactly like the “Step 1. Define Requisition Defaults” page in 9.1. The only difference being that this page was largely **unused** in 9.1 since the starting point was set as the 2. Add Items page, therefore, skipping this step of reviewing & making changes to a Requester’s Defaults *before* adding req lines. This resulted in most changes being made on the back end (either directly on the req lines or using the mass update page) *after* requisition lines were added.
 - Pre-populated (Requester specific default) values viewable on this page are pulled from Requester defaults defined during initial Requester setup (ex. when hired, change of agency etc.). This means some values could appear outdated/inactive if they change from year to year (ex. Project Id).
 - Requester defaults are maintained by the SAO Security team through submission of online security forms by Agency Security Administrators. Yearly updates to Requester Defaults could equate to minimal need for manual changes when entering requisitions.
- Use of this page minimizes (and in some cases eliminates) the need for changes *after* adding req lines. However, back-end changes are still possible using either the:
 - Review and Submit page (to apply changes on each individual req line), or
 - Mass Update page (to apply changes to selected - single or multiple - lines simultaneously).
- This page can be used to define and apply default values to all req lines for both **Special Requests** as well as **TGM cart-based reqs**.
 - However, it’s important to note that many values auto-default onto **TGM cart based req lines** so use of the “Line Defaults” fields on this page are unnecessary as they would be overwritten by the cart sit process (ex. category, supplier & supplier location, UOM etc.).
- This page can be used to create a requisition **for the Requester entering the req or on behalf of another Requester**, applying the respective default Requester defaults for each.

Step	Description
1.	Sign into PeopleSoft

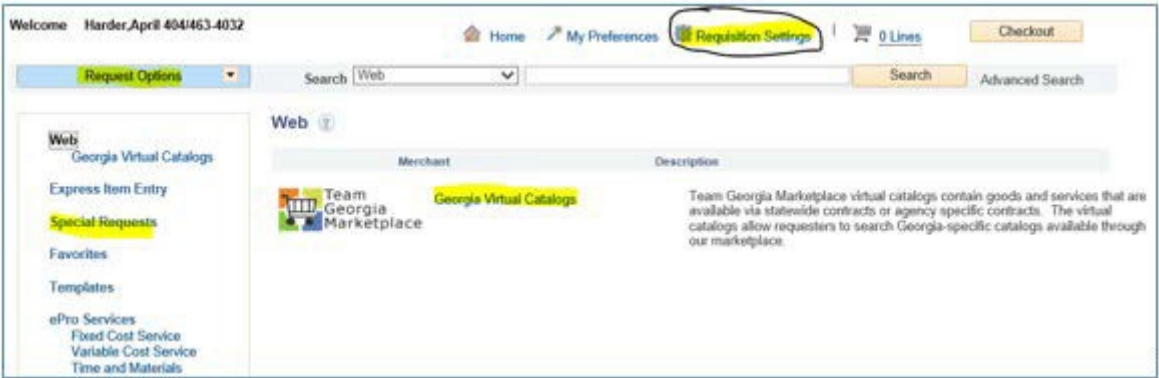
9.2.38 eProcurement: Using the Requisition Settings Page for Defaults Quick Reference Guide

Step	Description
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.	<ol style="list-style-type: none"> a) Review the pre-populated (Requester default) values on the Requisition Settings page. b) Decide to either accept the default values as defined or make changes on this page. c) Select the appropriate Default Option (see explanation for each option below). d) Make changes (if you choose) to pre-populated defaults or specify default values in blank fields. e) Click 'OK' to proceed with creating the requisition. <ul style="list-style-type: none"> • The "Default" Default Option radio button appears selected by default and is appropriate when accepting the Requester Default values with <i>no changes</i>. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Default Options ⓘ</p> <p><input checked="" type="radio"/> Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.</p> <p><input type="radio"/> Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.</p> </div> <ul style="list-style-type: none"> ▪ Leave the 'Default' option selected: <ul style="list-style-type: none"> • If you choose to accept requester default (pre-populated) values as they appear simply click 'OK' and move on to adding requisition lines. • If you choose to populate blank fields (having no requester default defined), these changes will be retained with the 'Default' option selected. However, a change to any field having a predefined requester default value defined will be lost if the 'Default' option remains selected. • Specify values in any blank fields on this page as needed, the new values will be retained with the 'Default' setting while changes to pre-populated default values will not be retained. • Click 'OK' to proceed with adding requisition lines and creating requisition. ▪ Select the "Override" Default Option radio button when making ANY changes to pre-defined default values appearing on this page to retain the changes you make.

9.2.38 eProcurement: Using the Requisition Settings Page for Defaults Quick Reference Guide

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	<ul style="list-style-type: none"> • If you choose to make a change to a field pre-populated with a requester default value, the Override Default Option must be selected to retain these changes. • The 'Override' Default Option also allows additional options to appear that are not available with use of the 'Default' option. These include the ability to: <ul style="list-style-type: none"> • insert additional default distribution lines • specify a SpeedChart for default onto all distribution lines. ▪ Make changes or leave pre-populated default values or specify values in blank fields as needed ▪ Click 'OK' to proceed with adding requisition lines and creating requisition.
4.	<p>To create a Requisition for yourself, with your Requester/User ID specified:</p> <ul style="list-style-type: none"> • Refer to Step #3 above for instructions on how to use this page.
5.	<p>To create a Requisition on behalf of another Requester:</p> <ul style="list-style-type: none"> • First, modify the Requester ID to specify the userid of the Requester you're creating the requisition for. • When the following pop-up message appears, take the steps outlined below: <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div> <ul style="list-style-type: none"> ○ Review defaults associated with the new Requester ID ○ Decide whether to: <ul style="list-style-type: none"> ➤ Accept Requester Defaults as-is, or

9.2.38 eProcurement: Using the Requisition Settings Page for Defaults Quick Reference Guide

Step	Description
	<p>➤ Change/define additional default values (ex. if you wish to specify a Requisition Name or add/change shipto location, chartfield values, or specify supplier info).</p> <ul style="list-style-type: none"> • Select ‘Yes’ (regardless of how you decide) • Select ‘OK’, then, on the Request Options page (shown in screenshot below): <p>a) IF you choose to accept the defaults as defined (without making changes or specifying additional default values before adding req lines), select the appropriate Requisition Option (Special Request or Georgia Virtual Catalog) and begin creating the requisition.</p> <p style="text-align: center;">OR</p> <p>b) IF you wish to make changes to the Requester’s default values or specify additional default values, select the ‘Requisition Settings’ link to return to the Requester Settings page.</p> <div style="text-align: center;">  </div> <ul style="list-style-type: none"> • Once you’ve returned to the Requisition Settings page, Refer to Step #3 above for instructions on how to use this page.