EP.010.050 – CREATING REQUESTERS

Purpose	• To create a Requester • To understand what attributes are associated with a Requester
Description	A Requester is a user with a security role and preferences which allows him/her to create requisitions in the system. 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.
Security Role	**BOR_PO_SETUP_CONFIG**
Dependencies/ Constraints	User is granted the security role noted above. Security Administrators need to set up the Requester's role and preferences.
Additional Information	None

Procedure

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

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Set Up Financials/Supply Chain** link.
4.	Click the **Product Related** link.
5.	Click the **Procurement Options** link.
6.	Click the **Purchasing** link.
7.	Click the **Requester Setup** link.
8.	Click the **Add a New Value** tab.
9.	Enter the Requester's User ID in the **Requester** field.
10.	Click the **Add** 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. ***Note**: If later a Requester should be Inactivated, follow the same navigation but using the dropdown arrow, select Inactive and click Save.*
12.	Enter the institution's SetID in the **ShipTo SetID** field.
13.	Enter the **Ship To** ID. This value defaults on the requisition. ***Note**: 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.*
14.	Enter the institution's SetID in the **Location SetID** field. This value defaults on the requisition.
15.	Enter the **Location** code.
16.	Enter "**SHARE**" in the **PO Origin SetID** field. ***Note**: All USG Institutions use the SHARE SetID for PO Origin.*
17.	Enter "**ONL**" the **Origin** field.

Step	Action
18.	Select the appropriate Requisition Status from the following: • Open: Requisition has been entered and saved, but it has not yet been submitted for approval. • Pending Approval: Requisitions have been submitted and are awaiting approval.
19.	Enter "**USD**" the **Currency** 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 **GL Unit**. ***Note***: *Chartfield information entered here defaults onto the requisition when one is created.*
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 **Fund** information, if needed.
30.	Enter the **Dept** information, if needed.
31.	Enter the **Program** information, if needed.
32.	Enter the **Class** information, if needed.
33.	Enter the **Project** information, if needed.
34.	Enter the **BUD REF** information. ***Note****: the BUD REF should be updated each fiscal year. For more information, see EP.080.070 – Updating BUD REF for All Requesters at Year End.*
35.	In the Catalog Information section, select the **Default** checkbox.
36.	Enter "**SHARE**" in the **SetID** field. ***Note:*** *Catalog information is centrally maintained and is standard across all USG institutions.*
37.	Enter "**NIGP_TREE**" in the **Catalog ID** field.

Step	Action
38.	Click the **Save** button.