

PROCUREMENT: Requisition Preference Charge Accounts (COA/POETAF)

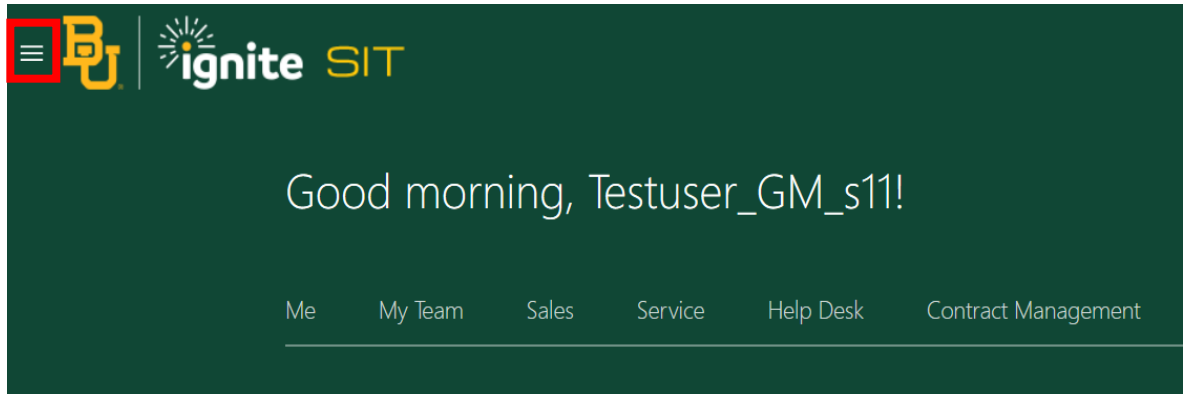
Requisition Preferences

- This job aid is intended for use by all Shoppers before they create their first requisition.
- All Shoppers need to set up a Favorite Charge Account in their requisition preferences.
- Shoppers can create multiple Favorite Charge Accounts within their profile which simplifies and streamlines the requisition entry process.
- Shoppers will be unable to successfully complete a requisition until this information is recorded in their profile.

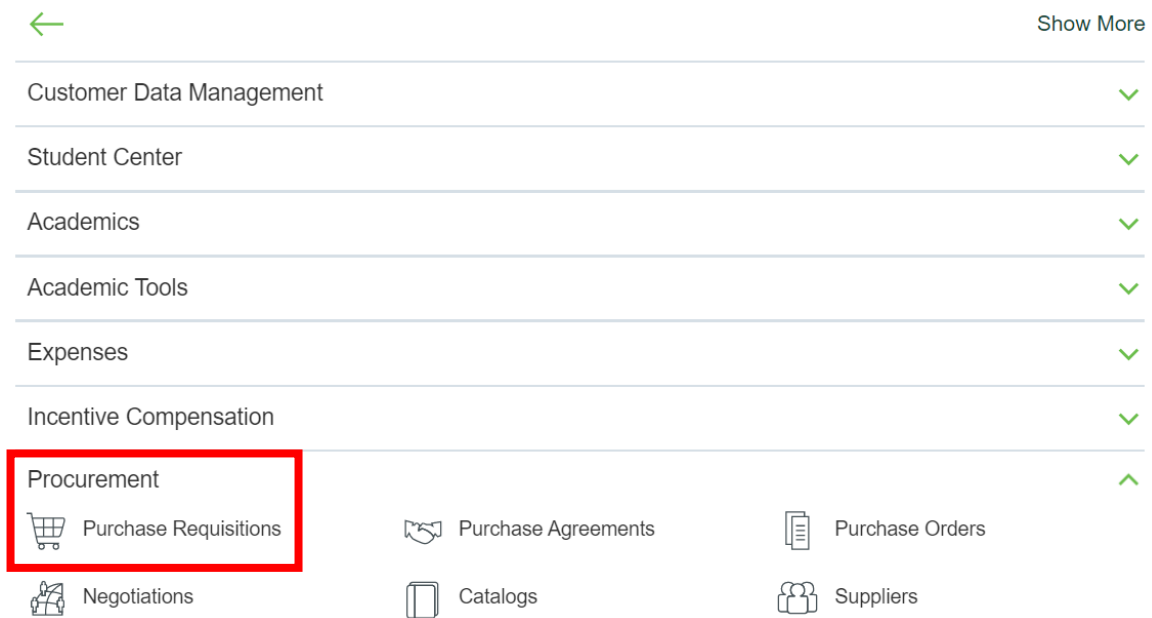
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I. Navigating to Purchase Requisitions

- I. The **Purchase Requisitions** task may be accessed in two ways:
 - a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

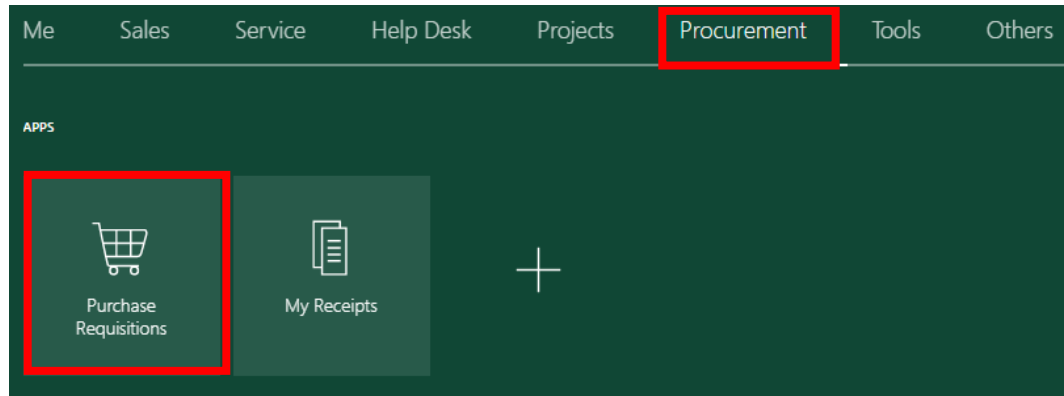


- b. Under the **Procurement** section, click the drop-down arrow, and select **Purchase Requisitions** from the drop-down list.



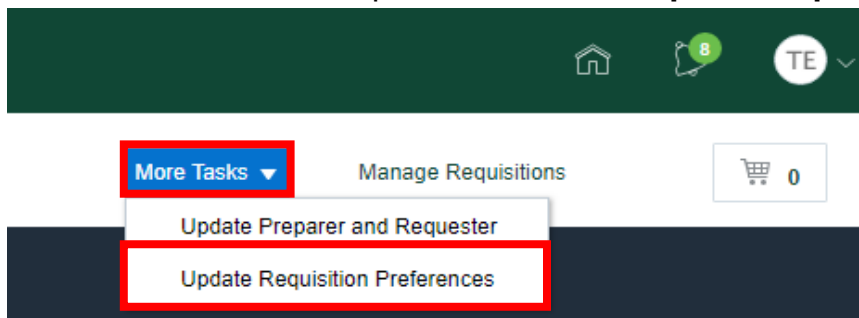
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- c. (Option 2) Under the **Procurement** heading on the home page, scroll down and click on the **Purchase Requisitions** tile on the Main Page.



2. Edit Requisition Preferences

- I. Select the **More Tasks** dropdown. Then, select **Update Requisition Preferences**.



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2. Under **Favorite Charge Accounts**, you will select the appropriate details to define your billing preferences for your requisitions. If you purchase for a project, be sure to enter the project number and the corresponding POETAF information in the field provided. However, if not all of your purchases will be billed to a project this area can be left blank and the project information can be populated as necessary on individual requisitions.

Edit Requisition Preferences

Requisitioning BU BAYLOR

Shipping and Delivery

* Requester Doyle, Bobbie

Deliver-to Location Type Internal

* Deliver-to Location Clifton Robinson Tower

Deliver-to Address 700 S University Parks Drive, FL 06 - RM 670, Waco, TX 76706, McLennan, United States

Destination Type Expense

Billing

Projects

Project Number

Task Number

Expenditure Type

Expenditure Organization

Contract Number

Funding Source

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
No data to display.			

Save and Close Cancel

3. In the **favorite charge account** section, click the **Plus** icon to designate the specific chart of account string as your default for future purchases.
4. First assign a **Nickname** for the Charge Account. Then click on the **COA icon** to define the independent COA segments.

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="X"/>

Save and Close Cancel

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5. You can enter the numbers directly in each field or use the drop down & search method. You will need to identify a value for each segment, including an account code; we suggest supplies 93800. **Note: the account code will update automatically depending on the procurement category selected on each line item. The remaining COA segments entered will default as indicated.**

Charge Account

Hide Segments

Alias

Entity

Department

Fund

Designation

Account

Purpose

Activity

Future1

Future2

Search Reset | OK Cancel

6. Once you've entered the COA segments click **OK**.
7. If you purchase for multiple departments, you can set up Favorite Charge Account for each. Simply repeat the above steps with different Nicknames assigned.
 - a. Be sure to set one of your Favorites as primary.
8. Then select **Save and close** to exit the screen.