PO Admin Checklist

Requester Set Up

This is to be completed by the PO administrators after they have received notification from the module lead in OMB that their personnel have been set up in PeopleSoft. <u>User Preferences must be entered by OMB before the PO administrator can proceed.</u>

A requisition can be used internally by a business unit as well as to notify the State Procurement Office that a bid is needed or to request approval from Information Technology Department for an IT purchase. The requester setup process needs to be completed for each user identified as a requester in a business unit.

Navigation: ***Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup***

1. Click the **Add a New Value** Tab
2. Click the look up glass, click the requestor you want to add.
3. Click **Add**.
4. Select the **Ship To SetID** (Business Unit).
5. **Ship To** (optional) – Enter the default Ship To Location code associated with this requester.
6. Select the **Location SetID** (Business Unit).
7. **Location Code** (optional) – Enter the default location code for requisitions entered by this requester.
8. Select the **PO Origin SetID** (Business Unit).
9. **Origin** (optional) – Enter the default origin code for requisitions entered by this requester.
10. **Currency** – Enter the default currency code for requisitions entered by this requester (**USD**).
11. **Phone** (optional) – Enter the requester's phone number.
12. **Fax** (optional) – Enter the requester's fax number.
13. Check 'Consolidate with other Reqs.' This allows the system to consolidate requisitions when creating purchase orders.

14. Check **‘**Price can be changed on order’. This allows the buyer to change the requested price on the purchase order.

15. **Requisition Status** - Check Pending

16. Default distributions can be entered.

17. Click Save.