

10. In the Need-By Date field, click the List of Values ... icon (the ellipsis icon next to the field) to display a calendar.
11. Double-click on a date to enter it.
12. Leave the GL Date field blank.
13. Tab to, or click in, the Charge Account field, and click the List of Values ... icon (the ellipsis icon next to the field) to display a charge account window.
14. Enter your account code in the respective fund segments, and press Enter.
15. Leave the next four fields blank.
16. Click in the Destination Type field, and select Expense.
17. In the Requestor field:
 - If you are the Requestor, leave this field blank. It autofills in the Requisition.
 - If you are not the Requestor, enter the last name of the person requesting the items and press Enter. A list of names may display. If it does, double-click the name of your Requestor.
18. Leave the next several fields blank. They autofill in the Requisition.
19. Click in the Source field, and select Supplier.
20. In the Buyer field:
 - If the requisition is less than \$2,500, enter your fiscal agent's last name.
 - If the requisition is over \$2,500, leave the Buyer field blank.
21. In the Note to Buyer field, enter any notes you have for your fiscal agent or the purchasing buyer.
22. In the Supplier field, you **must** click the List of Values
 - **Do not** "type in" your vendor in this Supplier field. You must use the List of Values and select your supplier from the "registered vendor" list.
23. In the Find field, enter a supplier name keyword enclosed in % signs.

24. Double-click your supplier.
25. In the Site field, you **must** click the List of Values ... and double-click on a site.
 - **Do not** "type in" your supplier site in this field. It must be selected from the list.
26. The Contact and Phone fields are optional. You can leave them blank or use the List of Values to select and enter this information.
27. When the Preferences are complete, click the Apply button.
28. To return to the Requisitions window, click the X close box in the upper-right corner of the **Requisitions Preferences** window – **not** the Oracle window.
29. Click in the Description field at the top of the window in the header area, and enter a general description of the requisition.
30. Press Tab.
 - If creating a requisition from April – June, a Budget Year window displays.
 - In the Budget Year field, click the List of Values icon, and double-click the appropriate budget year and click OK.
31. Tab to the line Type field.
32. In the Type field, click the List of Values
 - **Bikt** is used when creating Blanket Requisitions (Open Purchase Orders).
 - **Goods** is used when ordering tangible, usually one-time, items.
 - **Svcs-Dollars** is used when ordering services and items that don't come through Receiving.
 - **Svcs-Hours** is used when ordering hourly services.
 - **Outside processing** is not used here at Maricopa.
33. Double-click the appropriate line type.
34. Tab past the Item field.

35. In the Category field, enter a Category Code and press Tab.
 - The category code must be in this format: 415-00.
36. In the Description field, enter a very specific description of the item. Include item number, model and part numbers, color, brand, etc.
 - To open an editing window for this field, press Ctrl+E.
 - Click OK to close the editing window.
37. Tab to the UOM (Unit Of Measure) field.
 - If the item is counted singularly, leave the EACH value as is, and press Tab.
 - If the item is counted in a different unit of measure, click the List of Values and double-click the correct unit of measure.
38. In the Quantity field, enter the quantity being ordered, and press Tab.
39. In the Price field, enter the unit price, and press Tab.
40. If you are finished with this line, and want to add another line, please go to step 42.

If you are finished with this requisition, please go to step 55.
41. If this item is being split-coded (being charged to multiple account codes), or the account number needs to be changed, please go to step 46.
42. To order another item, press the Down Arrow on your keyboard.
 - If you do not want another line, from the Edit menu, select Delete, then click OK in the Caution dialog box.
43. Press Tab to advance to the line Type field.
44. Repeat steps 32 - 39 for this line.
45. When you are finished with the requisition, please go to step 55.
46. If an item is being split-coded (being charged to multiple account codes), or if you need to change an account number, click the Distributions button at the bottom of the screen.

47. If you are split-coding this item, tab to the Quantity field and enter the number of items, or the percentage of an item, or the dollar amount, (depending on your situation) that will be charged to the first account code.

If you are changing an account code, please click the Distribution button at the bottom of the screen and do steps 51, 52, and 54.

48. Tab to the Charge Account field to view the first account code.

49. To add another account code, press the Down Arrow.

50. Tab to the Quantity field and enter the number of items, or the percentage of an item, that will be charged to the second account code.

51. Tab to the Charge Account field and click the List of Values to display the Charge Account window.

52. In the Charge Account window, enter the fund segments of the second (or correct) account code.

53. Repeat the process for any additional account codes.

54. To close the Distribution window, click the close X in the upper-right corner of the **Distributions** window - *not* the *Oracle* window.

55. Press Ctrl+S to save your requisition.

56. To forward your requisition, click the Approve button.

- The Forward From and Approval Path fields cannot be changed.

57. Click the Forward option located on the left-hand side of the window.

58. Click in the Forward To field and delete its contents.

59. Click the List of Values.

60. Click in the find field, behind the starting % sign, and enter the last name of the person who is to receive the requisition, then enter a closing % sign.

- For example: %williams%

61. When the shortened list displays, double-click your choice.

62. In the Note field, you can enter a note for the next approver.

63. Click OK to submit the requisition.

64. Click OK.

- You are returned to a blank requisition at the Requisitions window.
- The preferences of your previous requisition are still in place.

To Create a New Requisition

If you have not exited your session, your previous Preferences are still intact.

1. To edit your Preferences, from the Tools menu, select Preferences.
2. Make your changes.
3. Click the Apply button.
4. Click the Close box in the *Preferences* window – not the *Oracle* window.
5. Repeat steps 29 - 39.

To Exit Oracle Applications

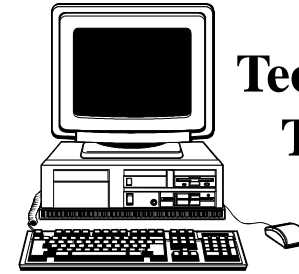
1. From the File menu, select Exit Oracle Applications.
2. Click OK.
3. Close the Oracle applet window.
4. In Netscape, from the File menu, select Exit.



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Technology Training Services

Creating a Requisition

1. Start the Netscape Communicator application.
2. In the Location field, enter the following url and press Enter. (Or use a bookmark you have previously set.)

Important! Please note that this url is case-sensitive! It must be entered exactly as shown.

http://fdb.dist.maricopa.edu:8000/OA_HTML/US/ICXINDEX.htm

3. In the User Name field, enter your CFS username. (This is not case sensitive.)
4. Click in, or Tab to, the Password field and enter your password.
5. Click the Connect button or press Enter.
6. At the Welcome screen, click the MCCCDCD REQUISTIONER responsibility.
7. To expand the Requisition options, double-click Requisitions.
8. Once the Requisitions options have expanded, double-click Requisitions.
9. From the Tools menu, select Preferences.
- **Preferences Note:** Not all of the fields in this Preferences window are required. A lot of the fields autofill in the Requisition form. These instructions only include the required fields.
- To move from field to field, press Tab or click in the desired field.