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.
I. Navigating to Purchase Requisitions

1. 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.
c. (Option 2) Under the **Procurement** heading on the home page, scroll down and click on the **Purchase Requisitions** tile on the Main Page.

![Procurement home page with Purchase Requisitions tile highlighted.](image)

### 2. Edit Requisition Preferences

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

![More Tasks dropdown with Update Requisition Preferences option highlighted.](image)
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.

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.
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 Form]

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.