

ePro - Personalising your Requisition

Introduction

By personalising the Chartfield Tabs in your Requisition, you can access relevant information without needing to tab through multiple tabs to review and edit the data. The personalisation choices you make will remain the same for all your Requisitions until you edit the fields again.

The personalisation procedure below is to be completed while you are creating a Requisition. You may add other fields that are relevant for you to review in your role, such as:

- **Department ID.** This is the department you are procuring the goods or services for
- **Project Code.** Your requisitions will default to the project code you provided when you requested access. You will only need to amend it if you are charging the item to a different project code
- **Merchandise Amount and Percent.** This field allows you to split costs across different Project Codes. For example you may want to allocate \$100 to Project Code A and \$200 to Project Code B, or 50 percent to Project Code A and 50 percent to Project Code B
- **Account Code.** This code identifies the type of cost that is being incurred such as stationery or laboratory materials. This field will be automatically filled.

Procedure

1. Create a Requisition with at least one item from an online catalogue or as a special request
2. On the **Checkout – Review and Submit page**, click on the **arrow** to the right of an item in the Requisition Lines section to see the expanded view.

Cart Summary: Total Amount 8.14 AUD

Expand lines to review shipping and accounting details + Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments/Attachments	Delete
1	SPECS SECURE FIT 400 SF401AF-A		Blackwoods	1.0000	Each	8.1400	8.14		Add	

Accounting Lines

*Distribute By: Qty SpeedChart: [] *Liquidate By: Amt

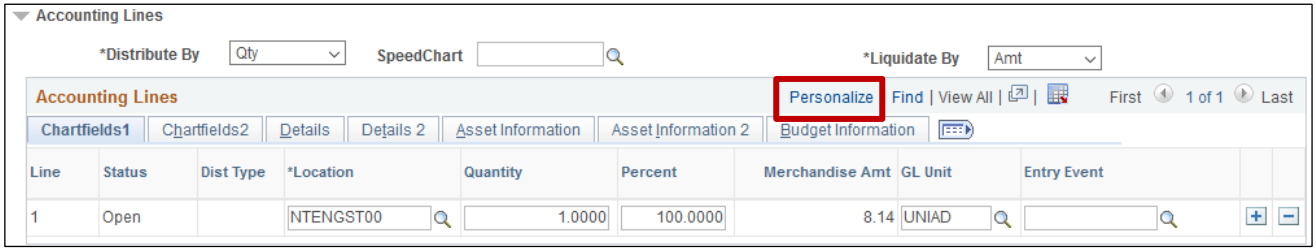
Accounting Lines Personalize | Find | View All | [] | [] First 1 of 1 Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		NTENGST00	1.0000	100.0000	8.14	UNIID	

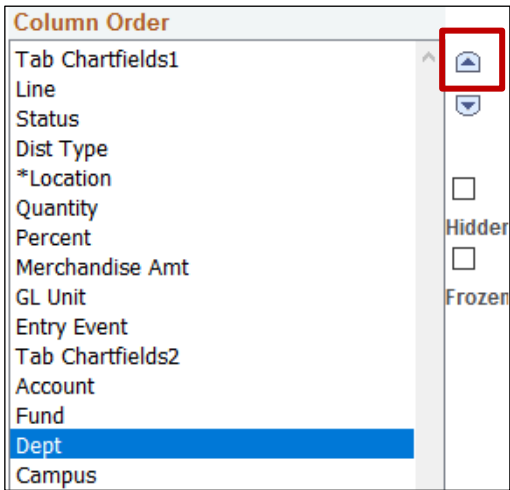
Select All / Deselect All
 Select lines to:
 + Add to Favorites
 + Add to Template(s)
 🗑 Delete Selected
 📄 Mass Change

Total Amount 8.14 AUD

3. Click **Personalize**

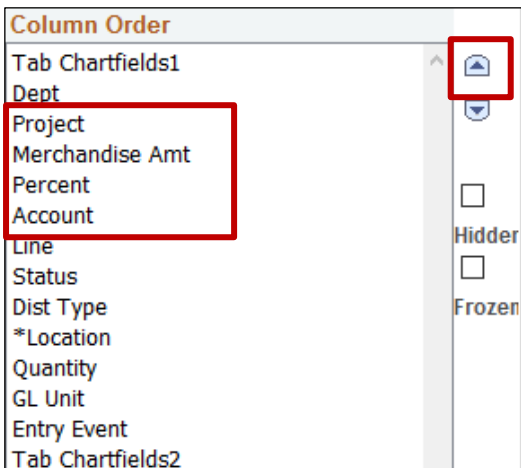


4. When the Grid Customization window opens, select **Dept** for Department.
Click the up **arrow** to move Dept to the top of the list below **Tab Chartfields1**.

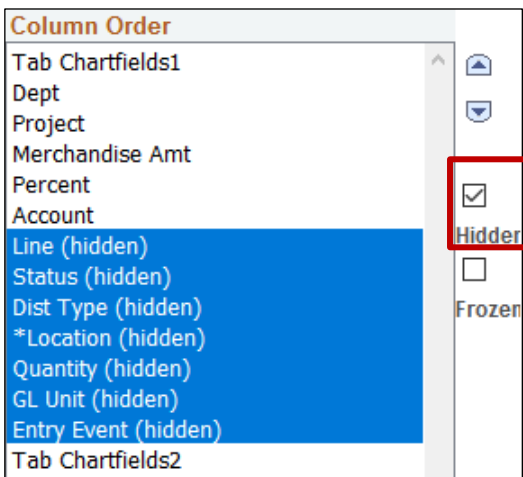


5. Individually select and move:
- **Project** (Project Code)
 - **Merchandise Amt** (Merchandise Amount)
 - **Percent** (Percent)
 - **Account** (Account) by using the up **arrow** so that they are listed below **Dept**.

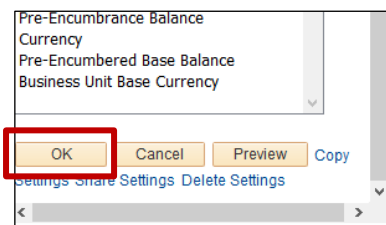
Note: You can add any additional fields to your Chartfields1 list that you regularly review this may include Activity ID



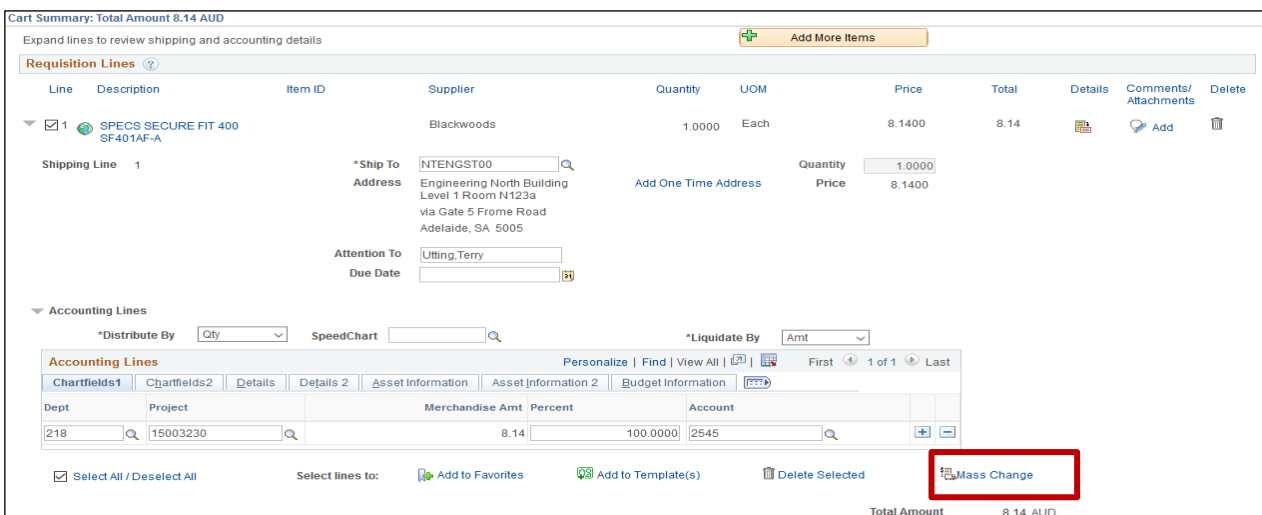
- Select the other fields under Tab Chartfields1 and either **move** them down with the down arrow under the Tab Chartfields2 heading. Alternatively if you never review these fields click **Hidden**



- Click **OK**. You will notice that your Chartfields1 Tab is now customised



Note: You can personalise the **Mass Change** function in the **Checkout - Review and Submit** page. The Mass Change function is used for making changes to all the lines in your Requisition in one go. Follow the same process as outlined above by clicking on Mass Change in place of Personalize.



A digital version of this guide is also available by clicking [here](#).

Contact Us

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