

REQUISITION

PREFERENCES

QUICK REFERENCE GUIDE PO-14

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to update Requisition Preferences in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to update Requisition Preferences.

Update Requisition Preferences

1. Click the **Procurement** tab and then click the **Purchase Requisitions** app.





2. Click the *More Tasks* drop-down choice list and select **Update Requisition Preferences**.

quisitions ②		More Tasks ▼ Manage Requisitions 0
Shop by Category Search		Enter Requisition Line Request Noncatalog Item Request New Supplier Update Preparer and Requester
Recent Requisitions View More	Recent Purchases	Update Requisition Preferences
19R0000037 BACON, SLICED, SMOKED Incomplete	No data to display.	
08R0000069 CENG-BODY STRUCTURE 📀 Approved		
08R0000068 CENG-BODY STRUCTURE O Approved		
08R0000061 CENG-BODY STRUCTURE Incomplete		
08R0000050 CENG-BODY STRUCTURE 📀 Approved		

3. The *Edit Requisition Preferences* pop-up appears. Under the *Shipping and Delivery* section, enter/update the details on the required fields and click the **Save and Close** button.

In this example, we choose, **Super User 1, Training** as *Requester*, **1900DPSNI-2020 YONKERS RD** as *Deliver-to Location* and **Expense** as *Destination Type*

Note: You will be redirected to the **Requisitions** page.

Edit Requisition Preferences			
Select the requisitioning BU where your preferences will be applicable.			
Requisitioning BU 1900 DEPARTMENT OF PUBLIC 5 ~			
Shipping and Delivery	5		
* Requester Super User 1, Training			
* Deliver-to Location 1900DPSNI-2020 YONKERS RD			
Destination Type Expense ~			
⊿ Billing			
Favorite Charge Accounts	+		
Primary * Nickname * Charge Account	Delete		
S No data to display.	Save and Close Cancel		

Wrap-Up

Update requisition preferences in NCFS using the steps above.

Additional Resources

Virtual Instructor-Led Training (vILT)

• PO101: PO Procurement Requester

Web Based Training (WBT)

• PO107: PO Advanced Procurement Requestor