Prepare an After the Fact Requisition

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| 1.   | Your [BFS (Berkeley Financial System) Home](#) page might look different, depending upon your user access.  
Click the [Purchasing](#) link. |
| 2.   | The [Purchasing](#) page appears.  
Click the [Add/Update Requisitions](#) link. |
| 3.   | Click the [Add](#) button. |
| 4.   | We want to see more of the page.  
Click the [Collapse (Ctrl+Y) Menu](#) button. |
| 5.   | The [Requisition](#) page opens.  
**Status is Open** - This indicates that you have done nothing to this Requisition.  
**Budget Status** - The Requisition will be “budget checked” (or posted) when it is Approved.  
**Requisition Date** defaults to today's date. Do not change it.  
**Currency Code** is USD (US Dollars) and cannot be changed.  
**Accounting Date** defaults to today's date. This will be updated when the Requisition is Approved. |
| 6.   | The [Requester](#) is the person requesting the goods or services. It is important to select the correct Requester, because the Requisition Approval Workflow is determined by the Requester.  
The Requester and Requisition Creator should be the same person.  
In this example, we are unsure how the computer displays our name and will use the [Requester Look Up](#) feature to find our name.  
Click the [Look up Requester (Alt+5)](#) button. |
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| 7.   | The **Look Up Requester** page appears.  
A Requester might have multiple org tree designations associated with their name.  
Because Requester is associated with Worklists and workflow (Requisition Approval), take care to select the correct org tree designation. |
| 8.   | We see the **Requester** we need.  
Click the **Sylvester** link. |
We will go to the **Requisition Defaults** link which is the most efficient place to enter Buyer, Vendor, Unit of Measure and Ship To information. In addition, by using the Requisition Defaults, you will populate the Requisition Line(s), Schedule Line(s) and Distribution Line(s).  
Click the **Requisition Defaults** link. |
| 10.  | The **Requisition Defaults** page appears. Notice, there are fields that will populate the **Line**, the **Schedule** and the **Distribution** when you return to the Requisition Main Page.  
Requisition **Line** details what you are buying.  
Requisition **Schedule** details product specifications.  
Requisition **Distribution** details the chart of accounts associated with this purchase.  
The values you enter here will populate the Requisition, but you can later change any of the defaulted information. |
| 11.  | **Important Note:**  
The order of the Distribution chartfields below might look different from yours. The chartstring in this picture has been modified to represent the UC Berkeley chartfield sequence. To learn how to customize your distribution chartstring, see "**Customize the Distribution Chartstring**". |
| 12.  | The **Location** field on the Distribution Line is associated with the Requester, is a physical location and identifies where (on or off campus) the goods will be delivered to, once they are received on campus.  
Each Requester will be assigned a default location code.  
If you need to update existing **Ship To** or **Location** codes or add additional locations for your department, email prchhelp@berkeley.edu. |
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| 13.  | The **Requisition Defaults** page has two **Default Options**.  
We use the "Override" option at UC Berkeley, because it consistently causes the values you enter on this page to be the values for the Requisition. In addition, by selecting **Override**, you can set up multiple distribution lines and you can use a **SpeedChart** and you are later able to change values on the Main Requisition page.  
Click the **Override** option. |
| 14.  | Fill in the Defaults for Buyer, Vendor, Unit of Measure, Category and other fields. In addition, we will complete the Distribution line. |
| 15.  | We will select a specific **Buyer**. You would key in the Buyer if you know how the Buyer is listed in the computer database.  
Because this is an **After The Fact Requisition**, it is very important to select the **After The Fact Buyer**.  
Click the **Look up Buyer (Alt+5)** button. |
| 16.  | The **Look Up Buyer** page appears. There are 33 **Search Results**.  
Click in the **Buyer** field. |
| 17.  | Enter the desired information into the **Buyer** field. Enter a valid value e.g. "after". |
| 18.  | Click the **Look Up** button. |
| 19.  | There is 1 **Search Results**.  
Click the **After_The_Fact** link. |
| 20.  | The **After The Fact Buyer** displays.  
Finish the Requisition Defaults and on the Requisition Main page and add Comments documenting that you have already received the goods or services.  
For more information, see "Prepare a Direct to Vendor (Low Value) Requisition". |
| 21.  | Congratulations. You have successfully prepared an After The Fact Requisition.  
**End of Procedure**. |