



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

## CAPPS Desk Aid

# Entering the Requisition Defaults, Speedcharts and Mass Changes

**Note:** This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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# Entering the Requisition Defaults, Speedcharts and Mass Changes

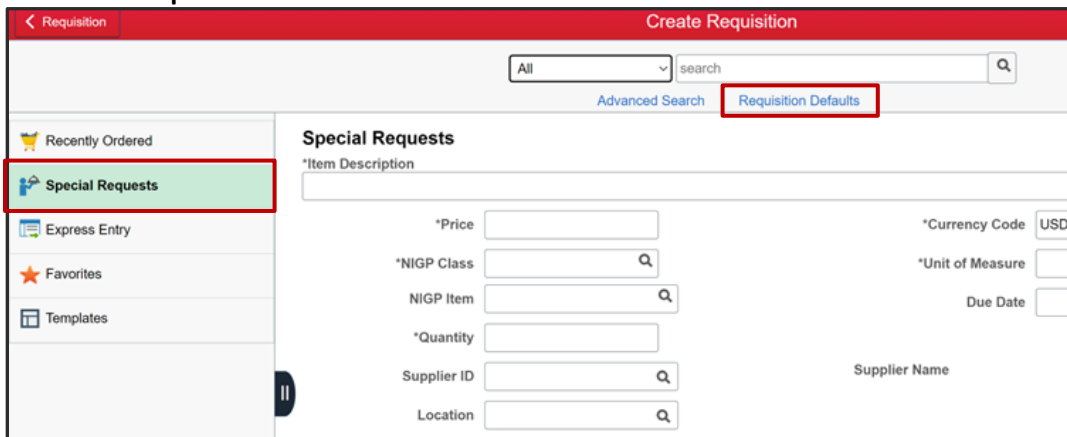
## Requisition Defaults

**Navigation**  
**NavBar:** Financials; eProcurement; Create Requisitions  
**Dashboard:** Purchasing; **Tile:** Requisitions

Whether processing a new or existing requisition, you need to open the **Requisition Defaults** page to set defaults. A new requisitions and an existing requisition have different navigation to get to that page.

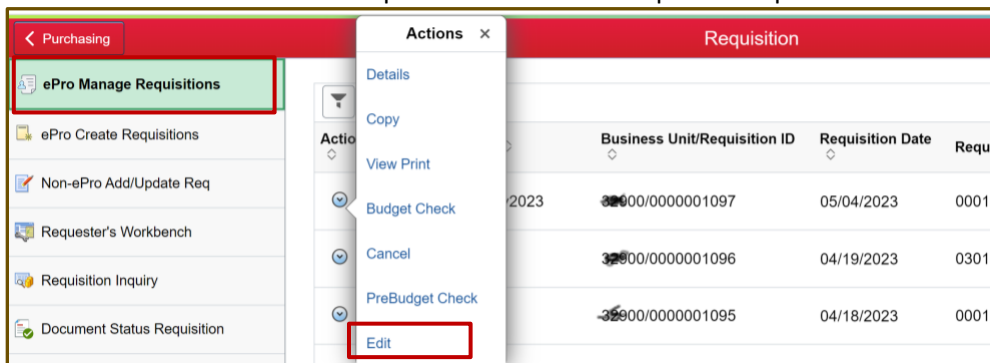
### For New Requisitions

1. Select the **ePro Create Requisitions** page.
2. Select the **Special Requests** tab.
3. Select the **Requisition Defaults** link.



### For Existing Requisitions

1. Select **ePro Manage Requisitions** page.
2. Select **Edit** in the ACTIONS drop-down menu for the specific requisition line.



3. Select **Requisition Defaults** link.

**Entering Values on the Requisition Defaults Page**

Once routed to the **Requisition Defaults** page, enter values to apply to new lines.

**Note:**  
 The BUYER ID is a required field on CAPPS requisition lines. The BUYER ID field usually populates automatically, based on the requestor's *User Preferences*. A BUYER ID default can also be set per *Origin* and *NIGP Class*.  
 If all happen to be set (*User Preferences, Origin, NIGP Class*), the BUYER ID is:

- Set at the origin level — overrides the requestor's user preferences.
- Set at the NIGP Class level — overrides the default set on origin and user preferences.
- Entered on the Requisition Defaults page — overrides NIGP Class, Origin and User Preferences.

1. Enter values for: SUPPLIER ID, SUPPLIER LOCATION, and NIGP CLASS. Optionally, you may enter **Distribution Defaults** for ACCOUNT and PERCENT.

The screenshot shows the 'Requisition Defaults' form with the following details:

- Header Defaults:** Business Unit: 000, Requisition Name: Office Supplies June2023, Requester: 0001006, Origin: CBA, Accounting Date: 05/01/2023, Currency: USD, Priority: Medium.
- Line Defaults:** Supplier ID: 1741976051, Supplier Location: 202, NIGP Class: 615.
- Shipping Defaults:** Ship To: SHIPPING, Attention: (empty).
- Distribution Defaults:** SpeedChart: (empty).
- Distribution Table:**

Distribution Line	Percent	Location	GL Unit	Account
1	86.2	MAIN	32	7953
2	13.8	MAIN	33	7953

2. Select **Done** once all values are entered.
3. Select **Yes** to confirm the pop-up message and continue.

This will overwrite header details entered on the requisitions. Do you want to continue?  
 Header details are already set on the requisition, clicking 'Done' will overwrite them with the header defaults entered in the Requisition Defaults.

Yes No

- Select the link in the *Item Description* section to review/verify line details were updated.

**Shopping Cart for Requisition ID 0000001481**  
1 Item(s) to buy now.

**Requisition Summary**

Business Unit: 0  
 Requisition Name: Office Supplies June2023  
 Requester: 00010065385  
 Currency: USD

Item Description	Status	Price	Currency	Quantity
<a href="#">AAA Batteries</a>	Approved	6.60	USD	5

The line details page shows the defaults for *Supplier ID*, *Supplier Location*, *NIGP Class*.

**Special Requests**

\*Item Description: AAA Batteries

\*Price: 6.6  
 \*NIGP Class: 615  
 NIGP Item: [Search]  
 \*Quantity: 5  
 Supplier ID: 1741976051  
 Location: 202

\*Currency Code: USD  
 \*Unit of Measure: PAK  
 Due Date: [Date]

Supplier Name: WORKQUEST  
 Manufacturer: [Search]

Supplier Item ID: [Search]  
 Suggest New Supplier  
 Manufacturer ID: [Search]  
 Manufacturer's Item ID: [Search]

Additional Information: 3 pac [Search]

Send to Supplier:  Yes  
 Shown at Receipt:  No  
 Shown at Voucher:  No

- Select **Return** after reviewing/verifying.
- Enter any other necessary requisition entries.
- Select **Save/Submit** when complete.

## Agency-Defined Speedcharts

### Navigation

**NavBar:** Financials; Set Up Financials/Supply Chain; Product Related; Procurement Options; Management; SpeedChart

If used by your agency, Speedcharts pre-enter most accounting line(s) values. A Speedchart may consist of one or more distribution lines and, once lines populate, the user can adjust values per line as needed. Depending on the Speedchart defined, the user may need to enter missing fields (such as ACCOUNT or AY).

1. Use the **Lookup** page (if needed) to search by SPEEDCHART KEY or DESCRIPTION.
2. Select a Speedchart.

The screenshot shows the 'Lookup' interface. Under 'Search Criteria', there are two dropdown menus: 'SpeedChart Key' and 'Description', both set to 'begins with'. Below these are 'Search' and 'Clear' buttons. The 'Search Results' section shows a table with columns for 'SpeedChart Key' and 'Description', and a '57 rows' indicator.

3. Select **Yes** to confirm the overwrite warning pop-up message and continue.

The screenshot shows a warning pop-up message: "This will overwrite existing distribution lines. Do you want to continue? Click Yes to continue and No to cancel." The 'Yes' button is highlighted with a red box.

4. Modify values (if needed) on the resulting accounting row(s).

The screenshot shows the 'Distribution' page. The 'Distribution Line' table is highlighted with a red box. The table has columns for 'Distribution Line', 'Status', 'Dist Type', 'Location', 'Quantity', 'Open Qty', 'Percent', 'Merchandise Amount', and 'GL Business Unit'. The table contains 4 rows of data.

Distribution Line	Status	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		MAIN	0.3	0.3	5	4,310	0000
2	Open		MAIN	0.9	0.9	15	12,920	0000
3	Open		MAIN	1.2	1.2	20	17,220	0000
4	Open		MAIN	3.6	3.6	60	51,650	0000

5. Select **Done**.
6. Select **Save/Submit** when complete.

## Using the Mass Change Function

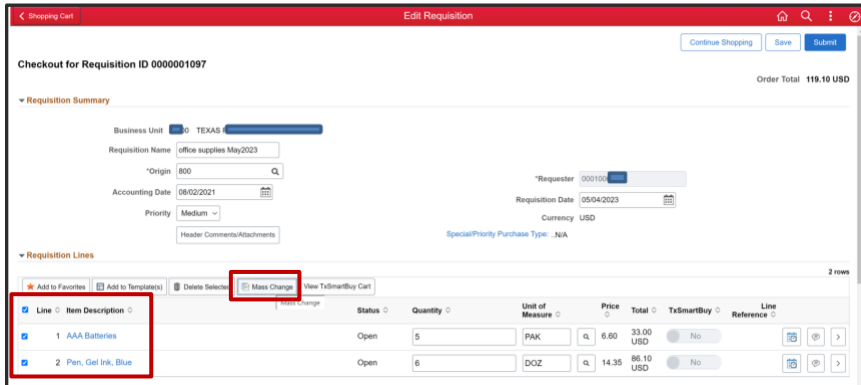
A **Mass Change** applies data entry of field values to **all** selected (existing) lines.

### Navigation

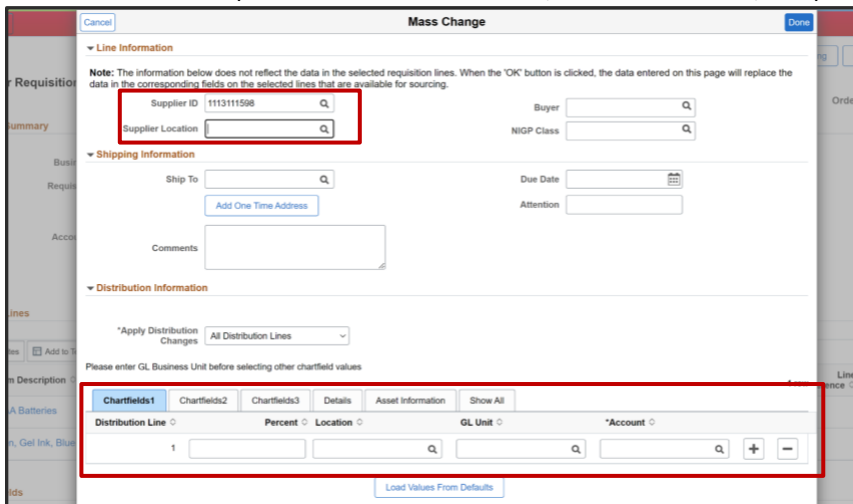
**NavBar:** Financials; eProcurement; Manage Requisitions

From the *Requisition Checkout* page:

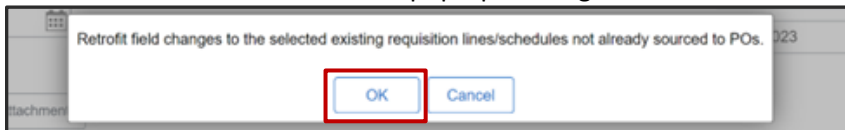
1. Select applicable requisition lines.
2. Select **Mass Change**.



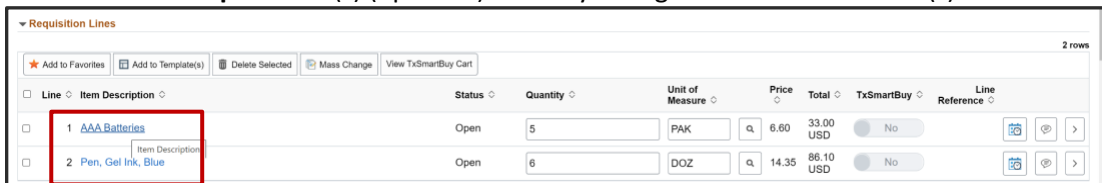
3. Edit desired values (such as SUPPLIER fields, CHARTFIELDS, etc.).



4. Select **Done**.
5. Choose **OK** to confirm the retrofit pop-up message and continue.



6. Select **Item Description** link(s) (optional) to verify changes were made to field(s).



7. Press **Return** when complete.

**Note:** Field values (including Chartfields) that were entered on the *Requisition Defaults* page can be changed retroactively with a *Mass Change* by selecting **Load Values From Defaults**.

- **For chartfields specifically:** After rows appear, select the **Apply Distribution Changes** drop-down menu to choose an action:
- **All Distribution Lines:** Apply changes to all existing distribution lines.
- **Matching Distribution Lines:** Apply changes to each existing distribution line by matching the distribution line numbers.
- **Replace Distribution Lines:** Remove the existing distribution lines and replace with the distribution lines changes.

8. Continue processing requisition lines.

9. Select **Save/Submit**.

## Revision History

Date	Description of Change	Changed By
March 7, 2025	Initial release.	J. Goodman