
HOW TO GUIDE: REVIEW REQUESTERS AND BUYERS SETUP

Last Updated May 17, 2019



Financial Security Liaisons can verify a user's purchasing information by reviewing their Requester/Buyer setup. This is the information that defaults in when creating a requisition or purchase order.

Requesters:

[Set Up Financials/Supply Chain](#)>[Product Related](#)>[Procurement Options](#)>[Purchasing](#)>[Requester Setup](#)

- Enter the User ID in the **Requester** field or enter search criteria to look up a user
- Click **Search**

The screenshot shows the 'Requester Setup' search page in the Core-CT system. The breadcrumb trail at the top reads: Favorites > Main Menu > Core-CT Financials > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup. Below the breadcrumb is the Core-CT logo and a search bar with a 'Navigator' dropdown, a search input field, and buttons for 'Advanced Search' and 'Last Search Results'. A navigation bar contains 'My HR', 'Finance', 'Core-CT Help', and 'STARS'. The main heading is 'Requester Setup' with a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button and a 'Search Criteria' dropdown menu. The search criteria section includes two dropdown menus: 'Requester begins with' (set to 'CTREQUESTER') and 'Description begins with' (blank). There is a 'Case Sensitive' checkbox (unchecked) and a text input for 'Limit the number of results to (up to 300):' (set to '300'). At the bottom of the search criteria are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search Results' section shows 'View All', 'First', '1 of 1', and 'Last' navigation options. A table with two columns, 'Requester' and 'Description', displays one result: 'CTREQUESTER CT REQUESTER'.

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- The Requester Setup page displays the requester defaults: Ship To, Origin and Department. The user's phone number is also displayed as well as any ChartField information that may have been defaulted.

Requester Setup

Requester CTREQUESTER CT REQUESTER Status Active

Requisition Defaults

ShipTo SetID STATE	Ship To 0640000558	Requisition Status
Location SetID STATE	Location ACORE	<input checked="" type="radio"/> Open
PO Origin SetID STATE	Origin 001	<input type="radio"/> Pending Approval
Currency USD Dollar	<input type="checkbox"/> Override Auto Item Substitute	
Phone 860/867-5309	<input type="checkbox"/> Use Only Assigned Catalogs	<input checked="" type="checkbox"/> Price Can Be Changed on Order
Fax	<input type="checkbox"/> Consolidate with other Reqs	<input type="checkbox"/> Defaults Inventory BU

ChartFields [Personalize](#) | [Find](#) | [View All](#) | |

GL Unit	Fund	Dept	SID	Program	Account	Bud Ref	ChartField 1	ChartField 2	PC Bus Unit	Project	Activit
STATE		DAS23551									

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Catalog Information [Personalize](#) | [Find](#) | [View All](#) | | First 1 of 1 Last

Default	SetID	Catalog ID	Description
<input checked="" type="checkbox"/>	STATE	CT_ALL_ITEMS	

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Buyers:

[Set Up Financials/Supply Chain](#)>[Product Related](#)>[Procurement Options](#)>[Purchasing](#)>[Buyer Setup](#)

- Enter the User ID in the **Buyer** field or enter search criteria to look up a user
- Click **Search**

The screenshot shows the 'Buyer Setup' search page. At the top, there is a breadcrumb trail: Favorites > Main Menu > Core-CT Financials > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Buyer Setup. Below this is the Core-CT logo and a search bar with a 'Navigator' dropdown, a search input field, and buttons for 'Advanced Search' and 'Last Search Results'. There are also tabs for 'My HR', 'Finance', 'Core-CT Help', and 'STARS'. The main heading is 'Buyer Setup' with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button and a 'Search Criteria' dropdown. The search criteria section includes: 'Buyer' begins with a dropdown set to 'CTGENBUYER' and an input field; 'Description' begins with a dropdown and an input field; a 'Case Sensitive' checkbox; and a 'Limit the number of results to (up to 300):' input field set to '300'. At the bottom of the search criteria are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search Results' section shows 'View All', 'First', '1 of 1', and 'Last' navigation options. A table with two columns, 'Buyer' and 'Description', contains one row: 'CTGENBUYER CT GENERAL BUYER'.

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- The Buyer Setup page displays the purchasing defaults: Department, Ship To and Origin. This is the information that is defaulted when creating a Purchase Order. The user's phone number is also displayed.

Buyer Setup

Buyer Setup		
Buyer	CTGENBUYER	CT GENERAL BUYER Status Active
Department SetID	STATE	Department DAS23110
ShipTo SetID	STATE	Ship To 0930000003
Location Set ID	STATE	Location ACORE
PO Origin SetID	STATE	Origin 099
Phone	860/867-5309	PO Dispatch Signature Location:
Fax		

Default PO Status
 Open
 Pending Approval/Approved