PO-01 Create Requisitions for Self

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Create Expense Requisitions for self in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to create requisitions for self. A requisition is an internal purchasing document used to capture the need for goods and/or services.

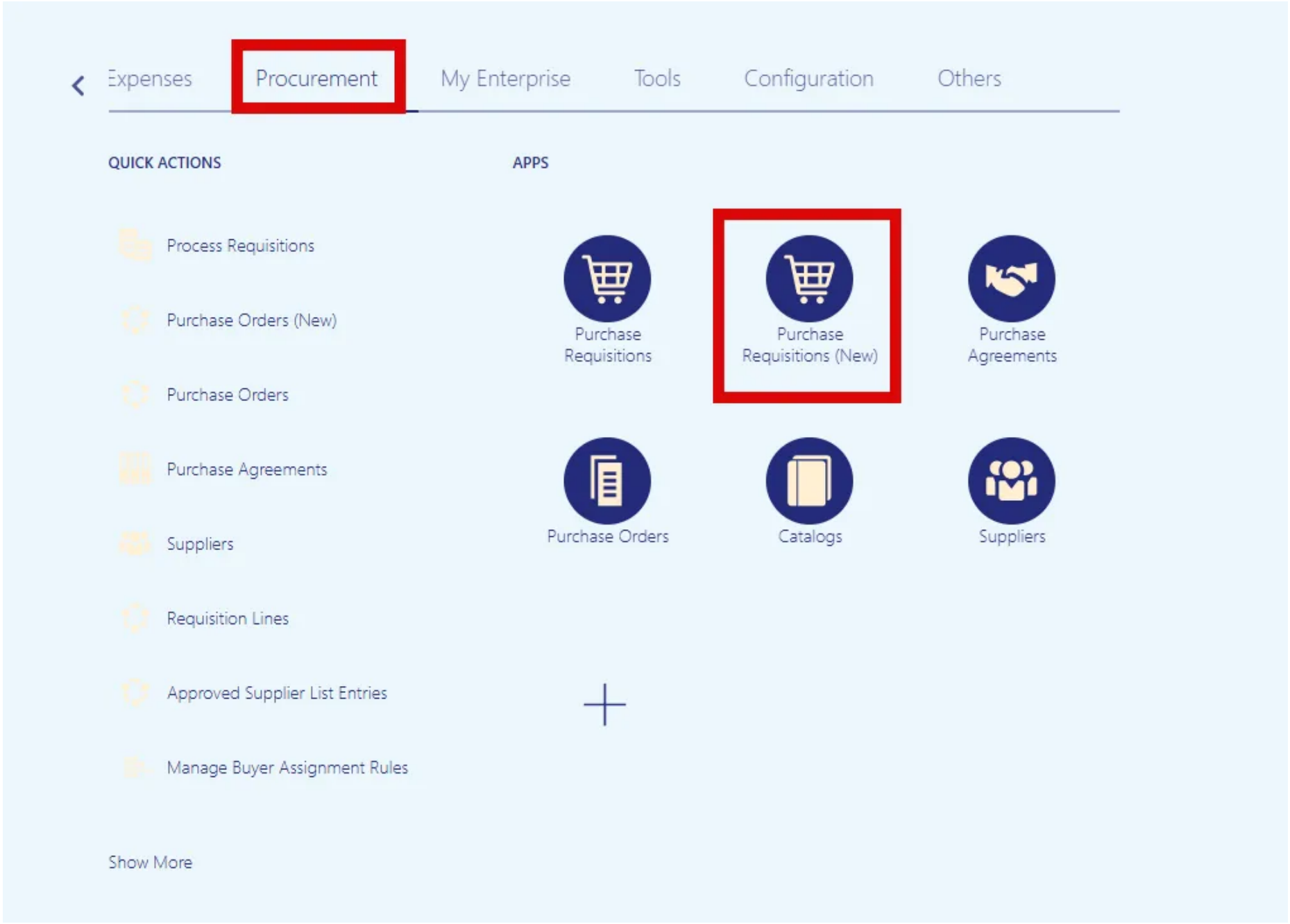
Create Expense Report

To create create expense reports, please follow the steps below. There are 19 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

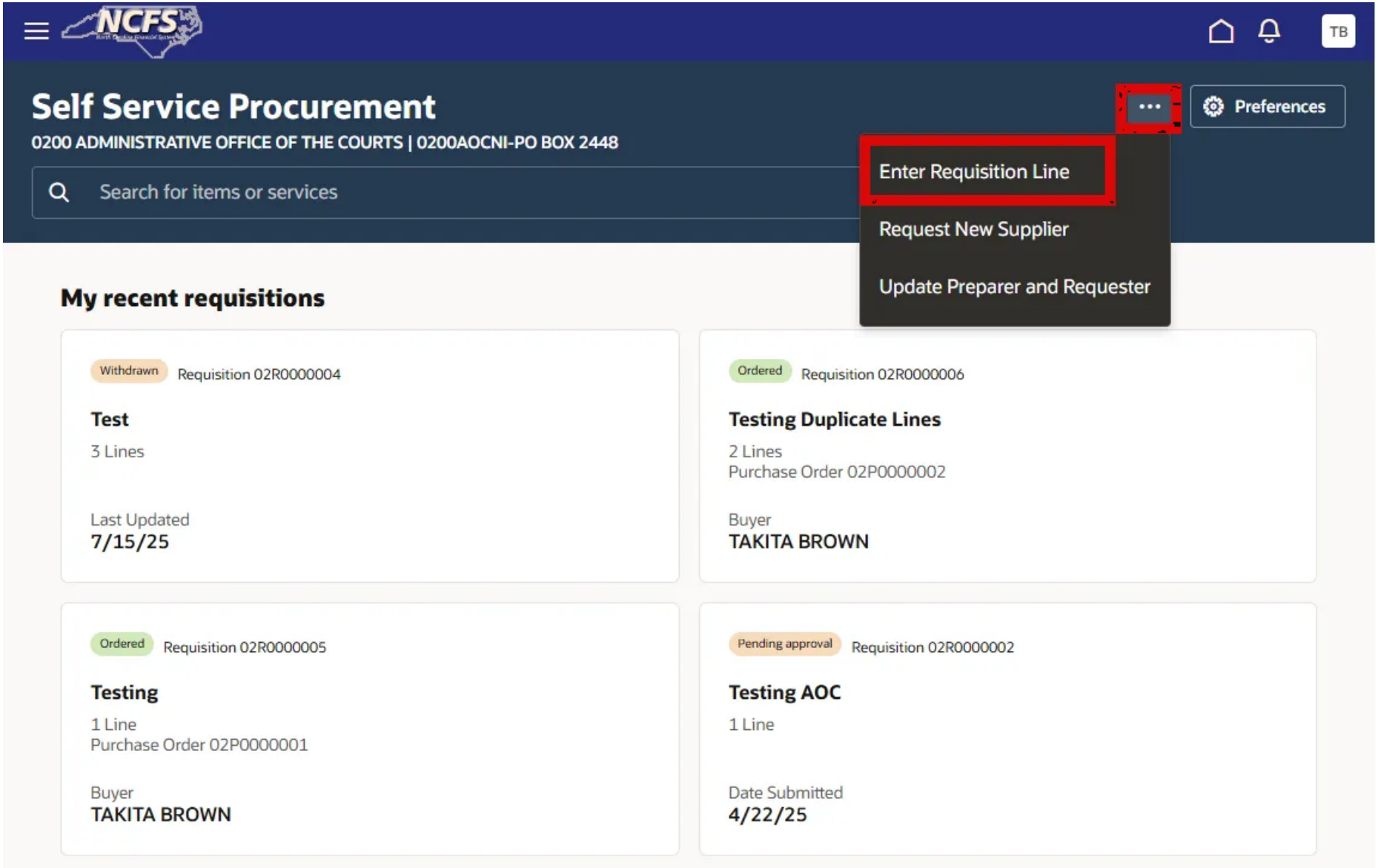
Step 2. On the **Home** page, select the **Procurement Tab**. Select the **Purchase Requisitions** app.

Image


Expenses
Procurement
My Enterprise
Tools
Configuration
Others
QUICK ACTIONS
Process Requisitions
Purchase Orders (New)
Purchase Orders
Purchase Agreements
Suppliers
Requisition Lines
Approved Supplier List Entries
Manage Buyer Assignment Rules
Show More
APPS
Purchase Requisitions
Purchase Requisitions (New)
Purchase Agreements
Purchase Orders
Catalogs
Suppliers

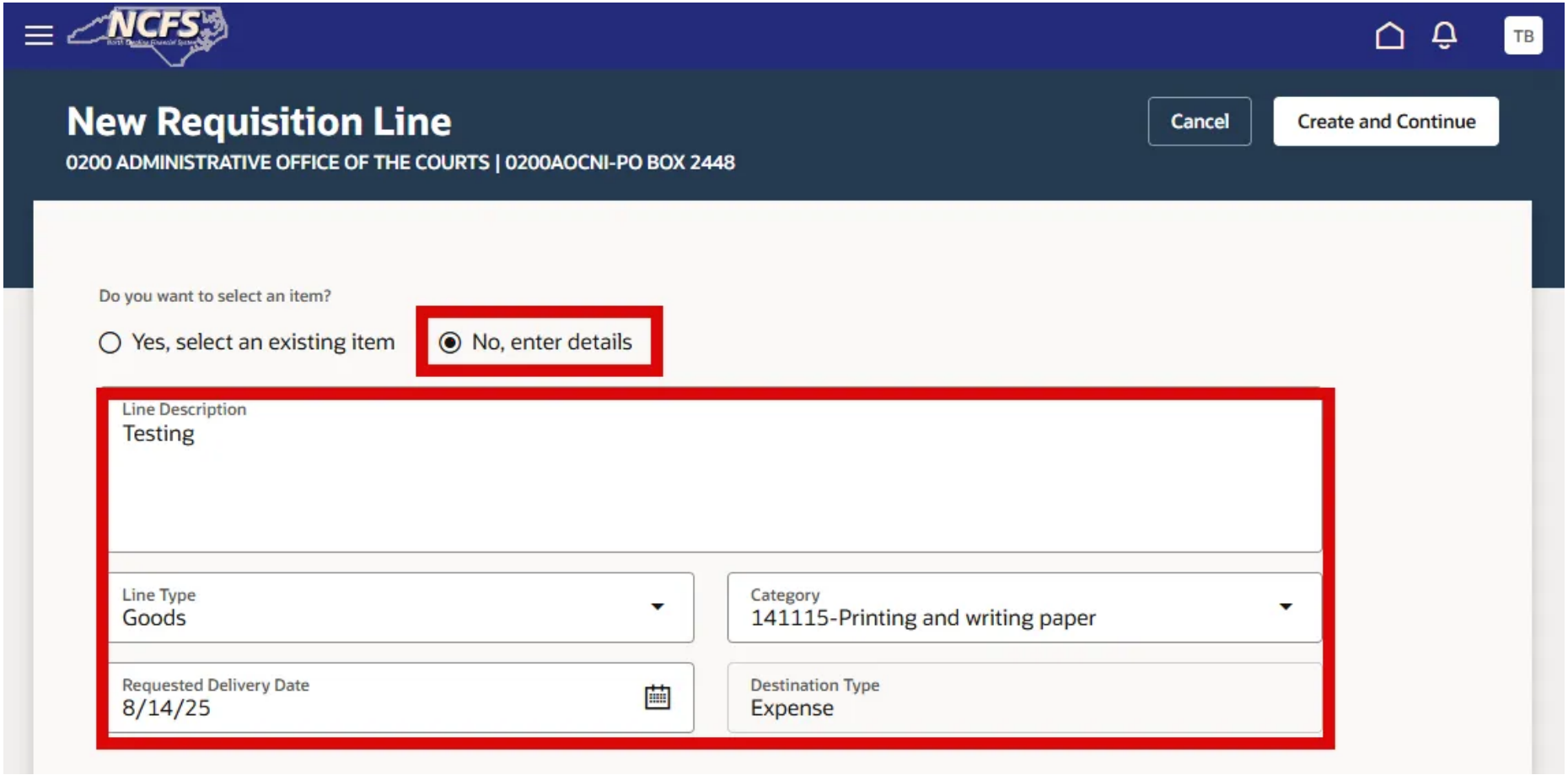
Step 3. Select the **Actions** drop-down choice list, on the top right corner, and select **Enter Requisition Line**.

Image



Step 4. On the **New Requestion Line** page, select **No, enter details** and then enter the details in all the **required** fields.

Image



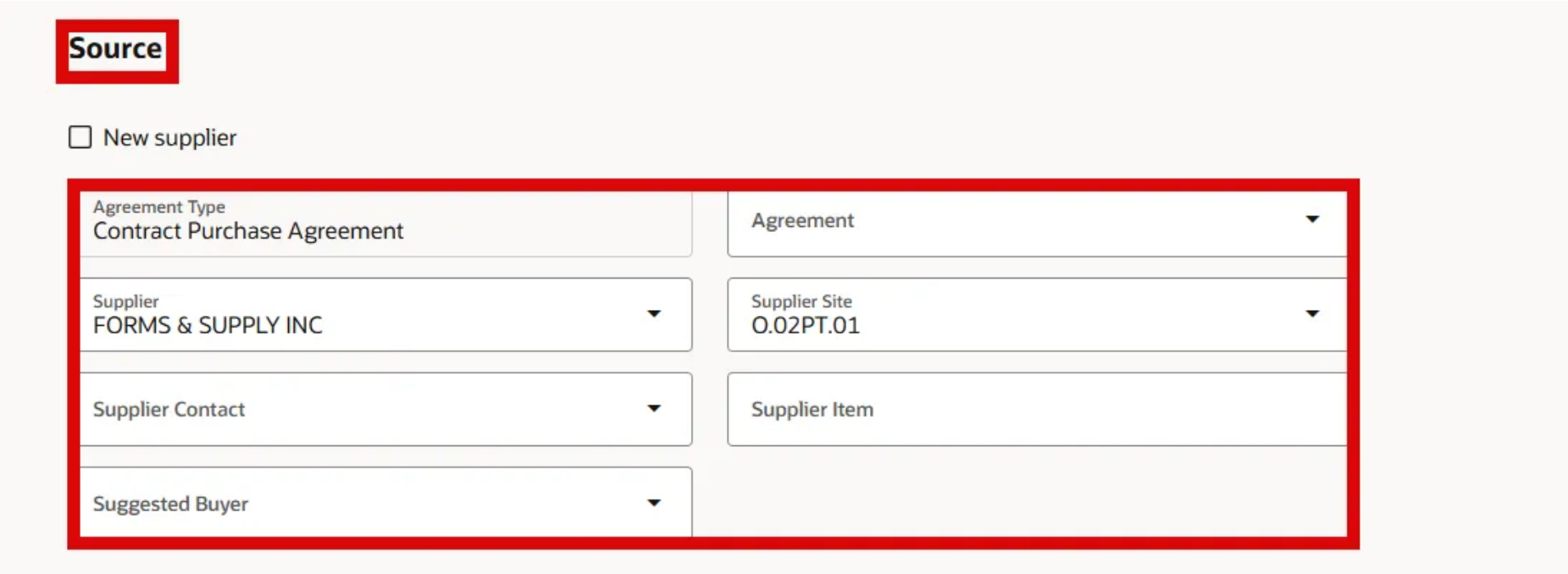
***Example:**

- **Line Description**: Testing
- **Line Type**: Goods

- **Category**: 141115-Printing and writing paper
- **Requested Delivery Date**
- **Destination Type**: Expense (**always**)

Step 5. On the **New Requestion Line** page, on the **Source** section, enter the required details.

Image

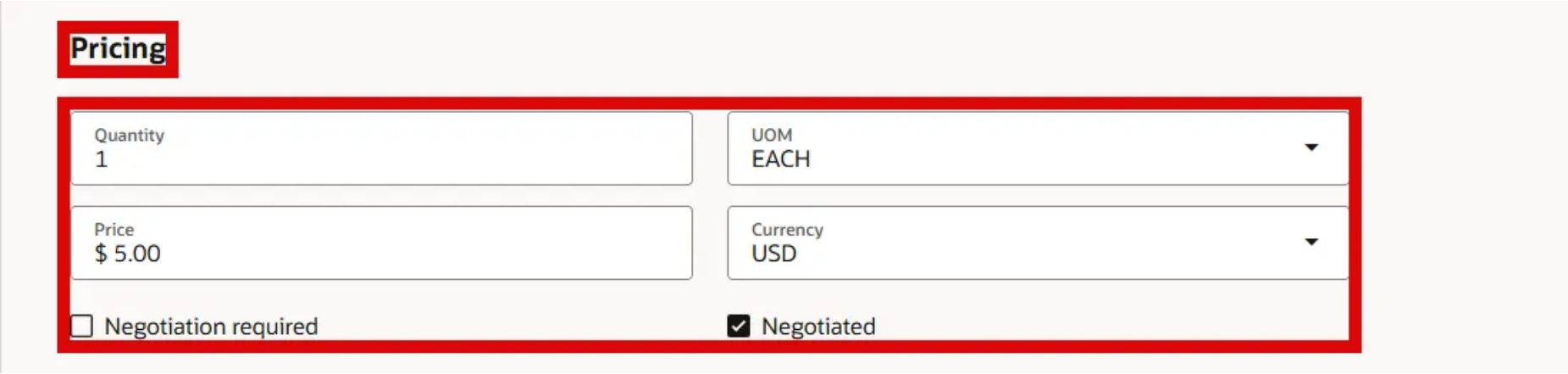


Example:

- **Agreement Type**: Contract Purchase Agreement (always)
- **Supplier Name**: FORMS & SUPPLY INC
- **Supplier Site**: as O.02PT.01

Step 6. On the **New Requestion Line** page, on the **Price** section, enter the required details.

Image



Example:

- **Quantity**: 1
- **UOM**: Each
- **Price**: 5
- **Currency**: USD
- **Negotiated**: Yes

Image

Notes

Note to Buyer

Note to Supplier

Note to Receiver

Attachments

Category
Internal to Requisition

Drag and Drop
Select or drop files here.

URL

Add URL

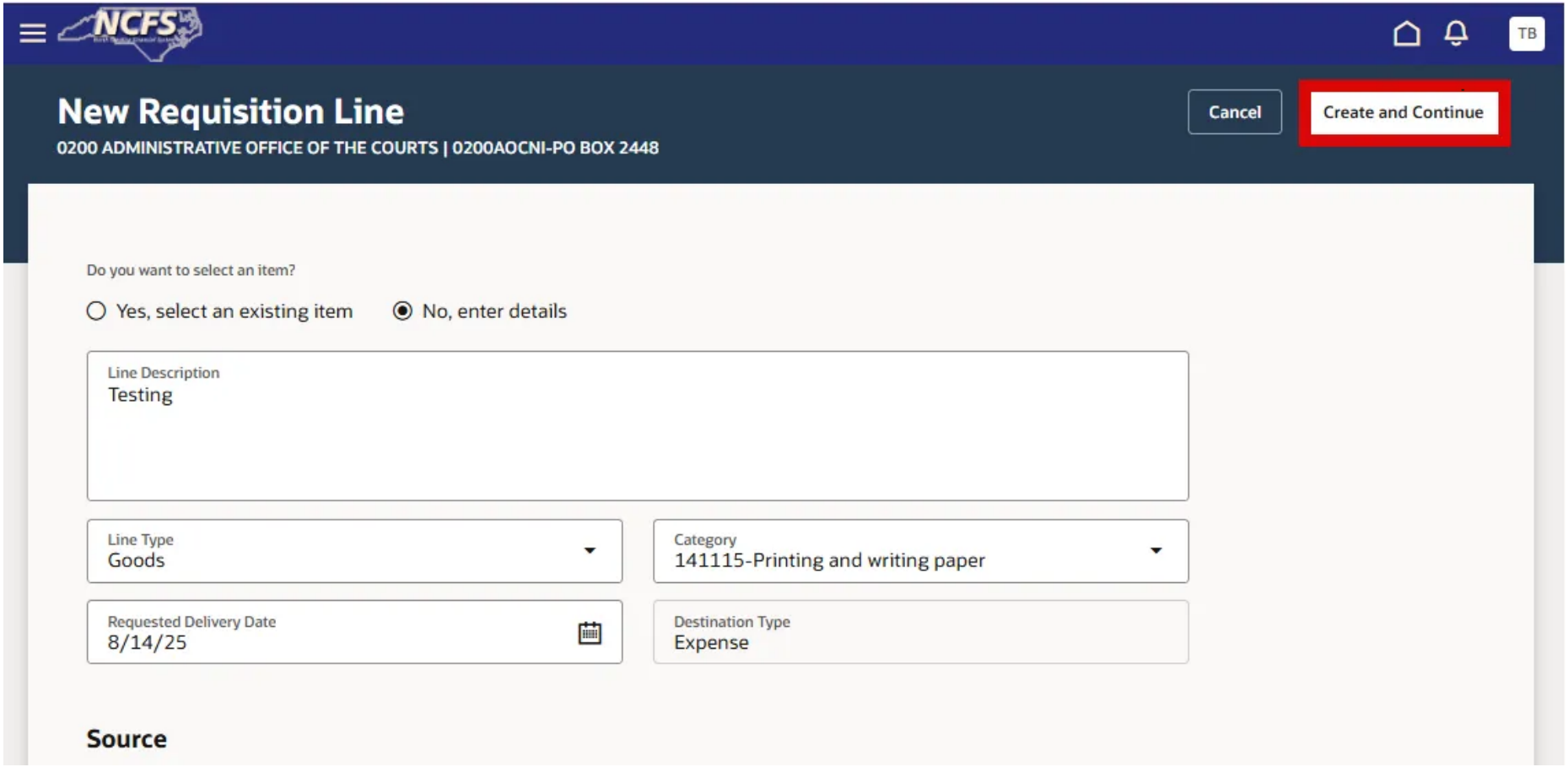
Internal to Requisition
Test Doc fo RSSP.txt
4.00 B

Last updated on 8/7/25

* *Disregard the **Additional Information** area*. You may enter **Notes** and add **Attachments** as well. *The above scenario is for AOC only.*

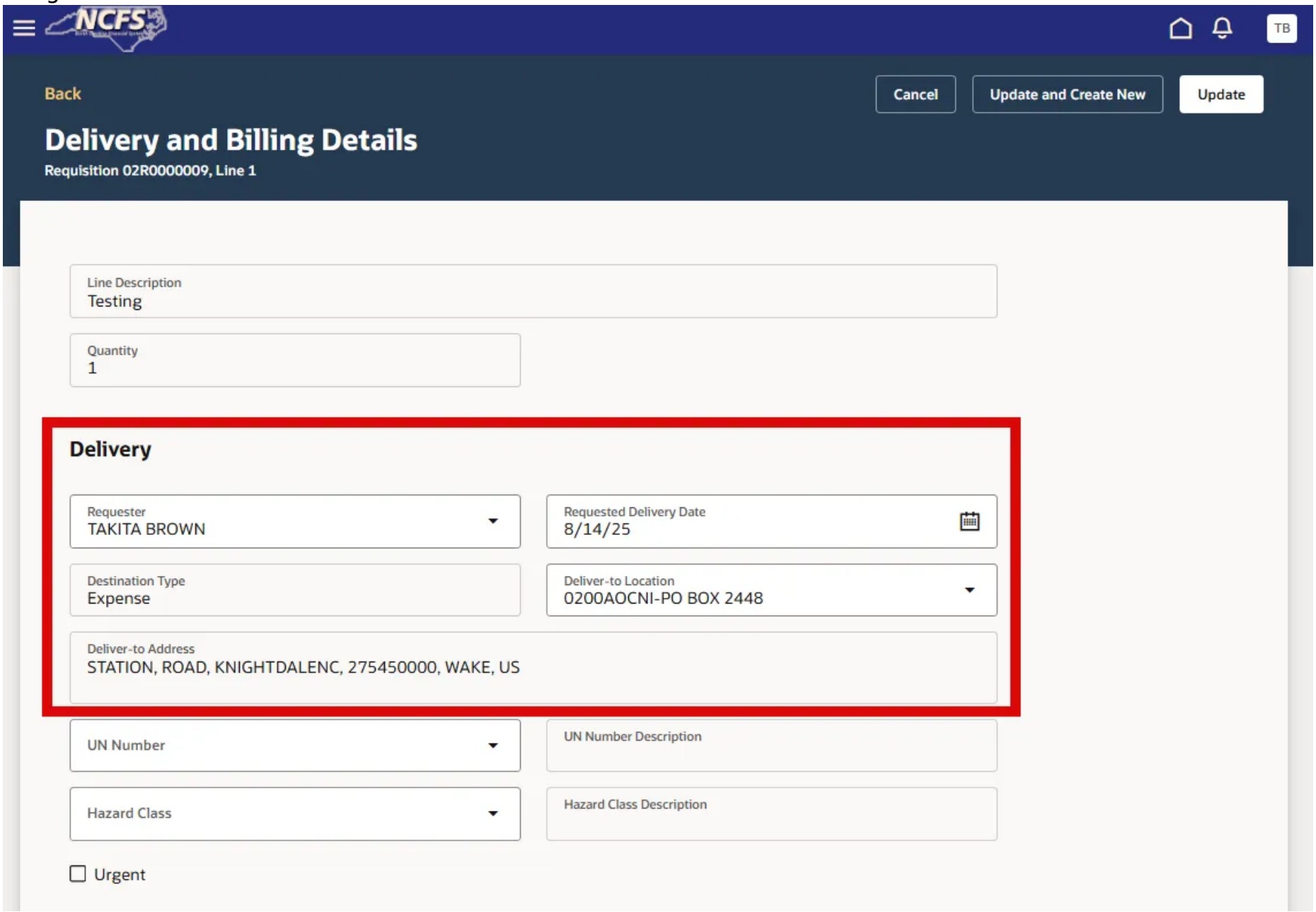
Step 7. Select **Create and Continue** at the top right corner.

Image



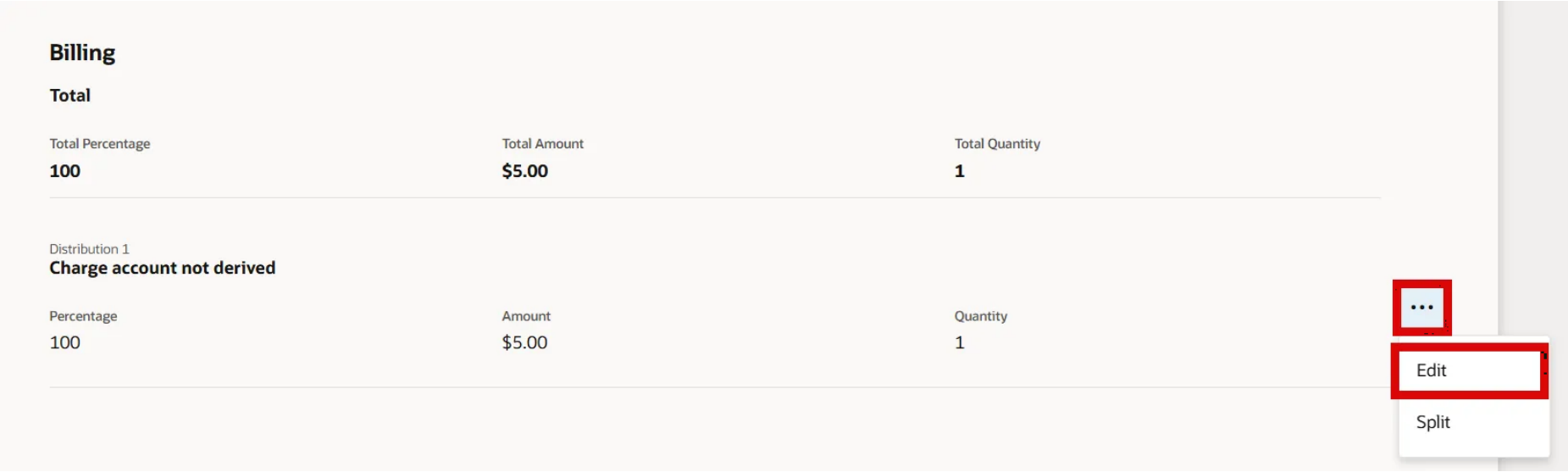
Step 8. Under the **Delivery** section, validate the auto populated ***Requester, Deliver-to Location***, and ***Requested Delivery Date*** fields.

Image


NCFS
TB
Back
Cancel
Update and Create New
Update
Delivery and Billing Details
Requisition 02R0000009, Line 1
Line Description
Testing
Quantity
1
Delivery
Requester
TAKITA BROWN
Requested Delivery Date
8/14/25
Destination Type
Expense
Deliver-to Location
0200AOCNI-PO BOX 2448
Deliver-to Address
STATION, ROAD, KNIGHTDALENC, 275450000, WAKE, US
UN Number
UN Number Description
Hazard Class
Hazard Class Description
Urgent

Step 9. Under the ***Billing*** section, select the **Actions for Test (…)** and select the **Edit** option, and enter the Chart of Account details

Image



Step 10. Select **Search for Combinations** icon in the right corner of the ***Charge to*** field.

Image

Distribution 1

Quantity
1

Amount
$5.00

Percentage
100

Budget Date
8/7/25

Charge account

Charge To
---0000000-0000000-0000-0000000000-000000-0000-000000-00000

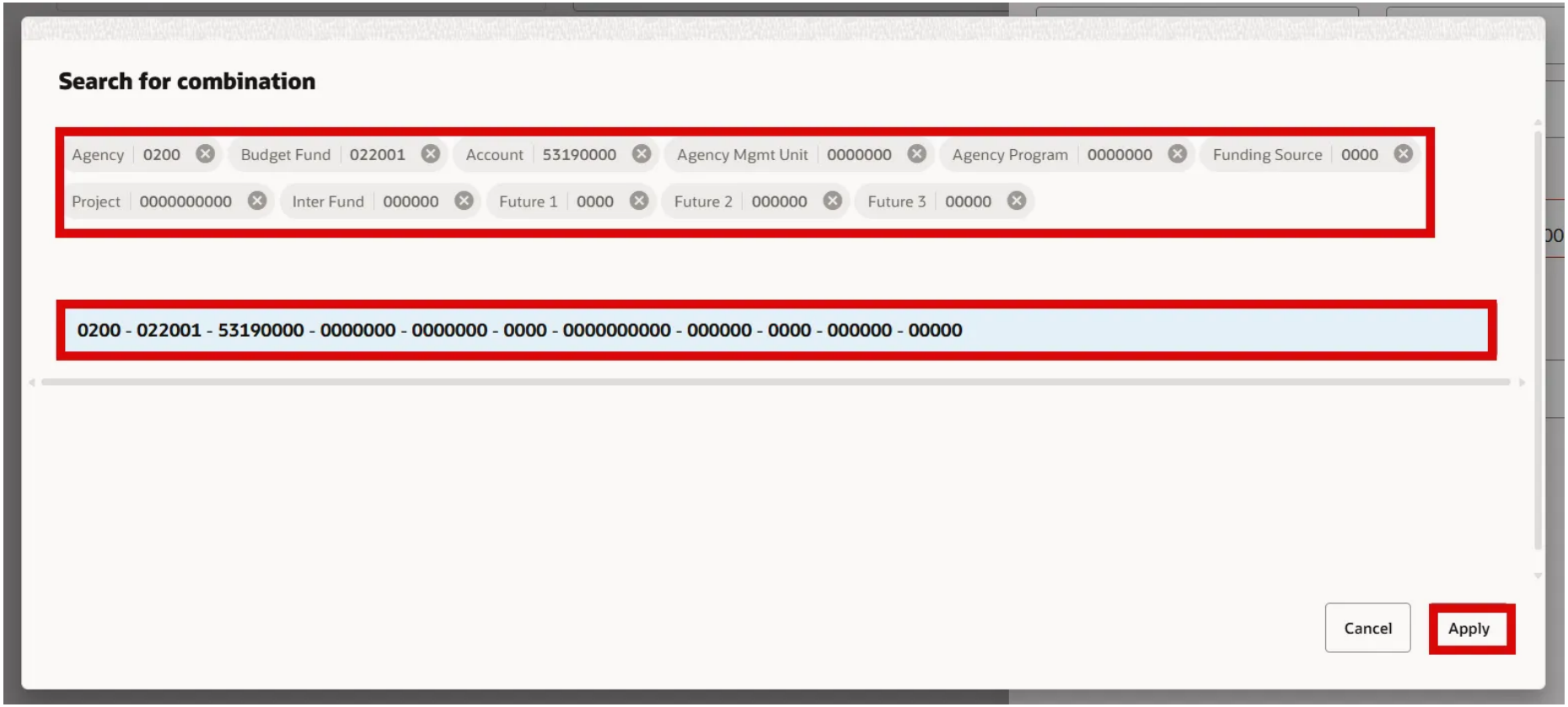
Additional information

Attribute Value

Attribute Value

Step 11. Select the appropriate **Segment values** for the **Chart of Accounts**, and then select the **Accounting Segment** section and select the **Apply** button.

Image



***Example:**

- **COA**: 0200-022001-53190000-0000000-00000000000-0000000000-000000-0000-000000-00000

Step 12. Select **Update** button in the lower right corner.

Image

Distribution 1

Quantity
1

Amount
$5.00

Percentage
100

Budget Date
8/7/25

Charge account

Charge To
0200-022001-53190000-0000000-0000000-0000-0000000000-00000

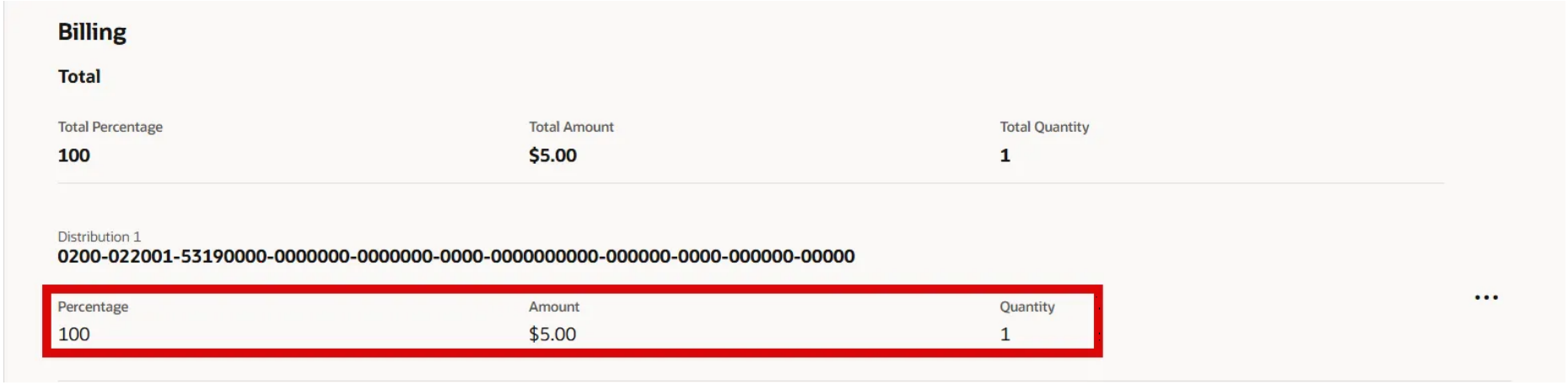
Additional information

Attribute Value

Attribute Value

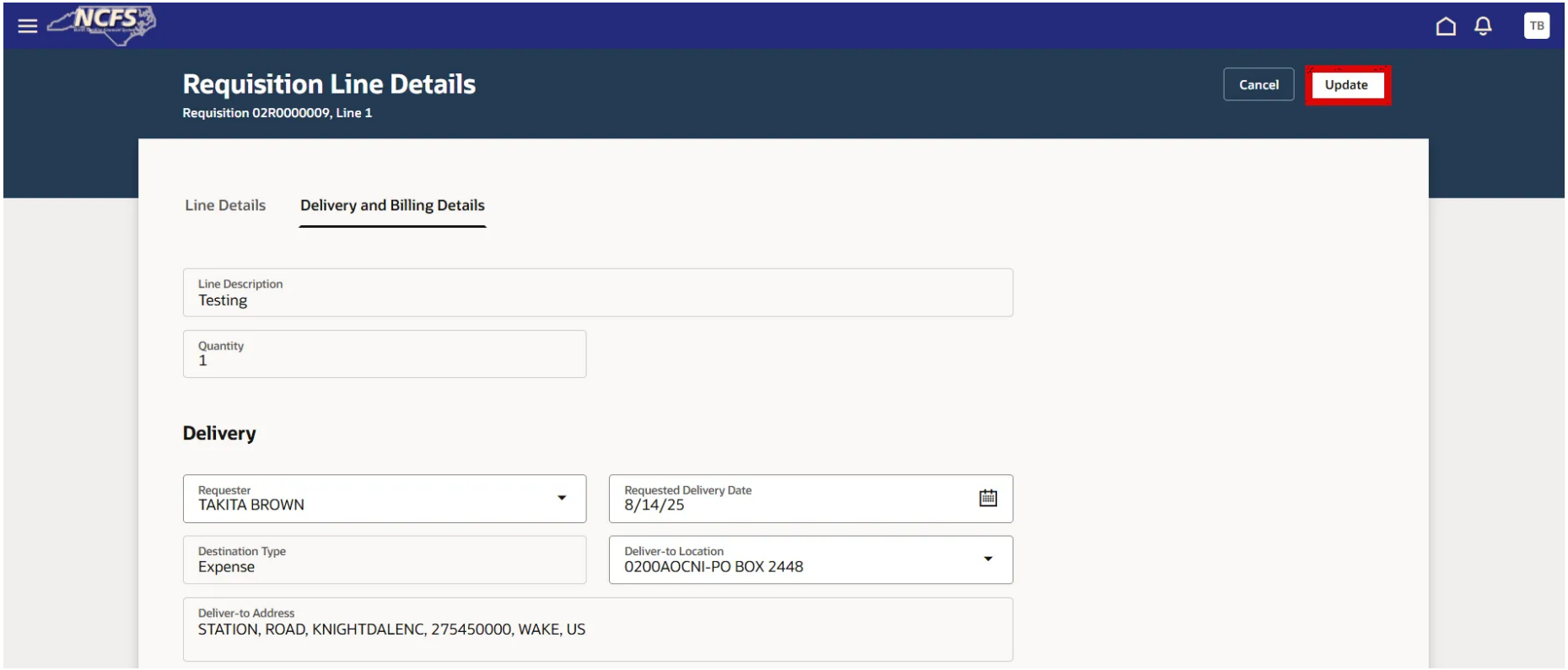
*Note: Percentage, Quantity, and Amount (USD) fields will be auto populated.

Image



Step 13. Select the **Update** button in the upper right corner of the **Requisition Line Details** page.

Image



*Note: Selecting **Update** will add the item to the cart and create the Requisition.

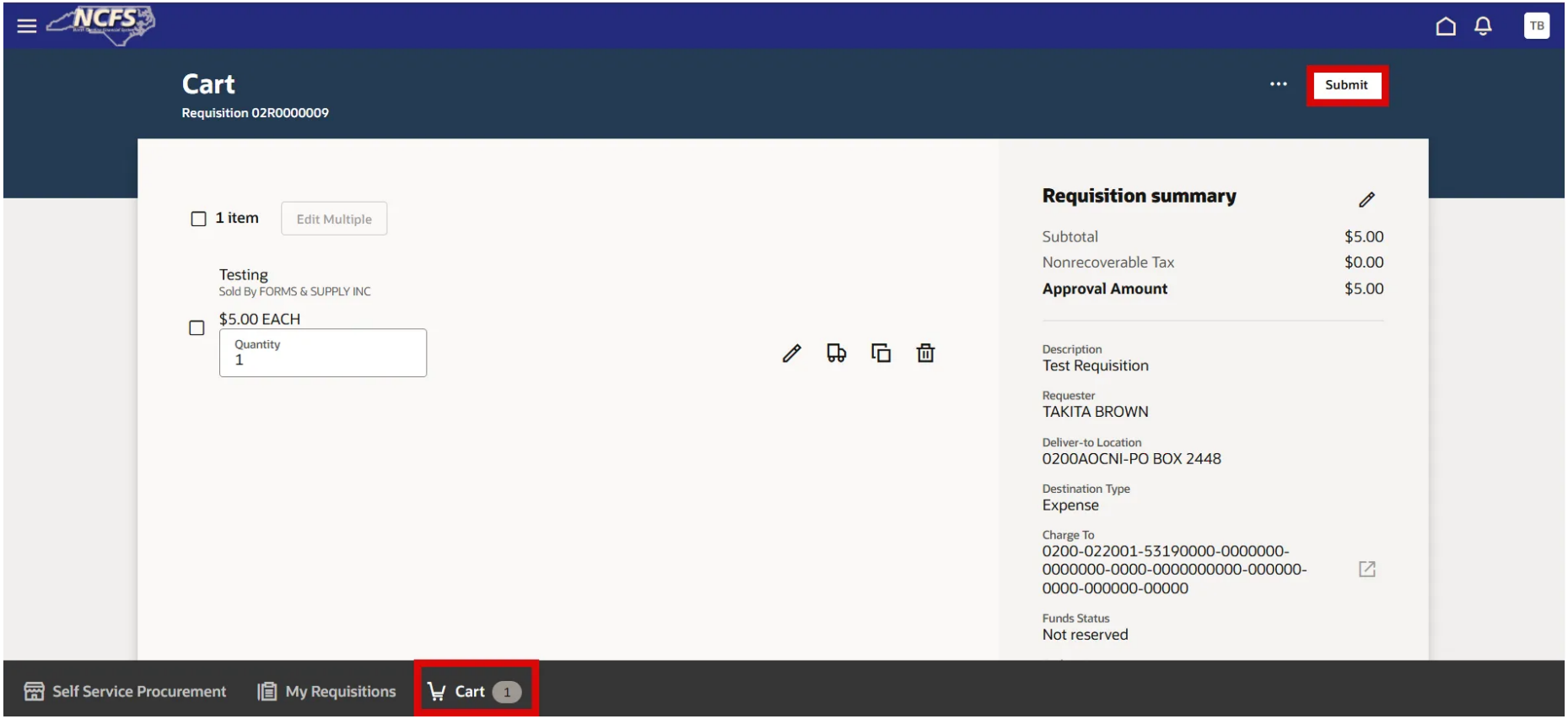
Step 14. On the **Cart** tab section, select the **Edit** icon to enter the **Requisition Description**, and then select the **Update** button.

Image



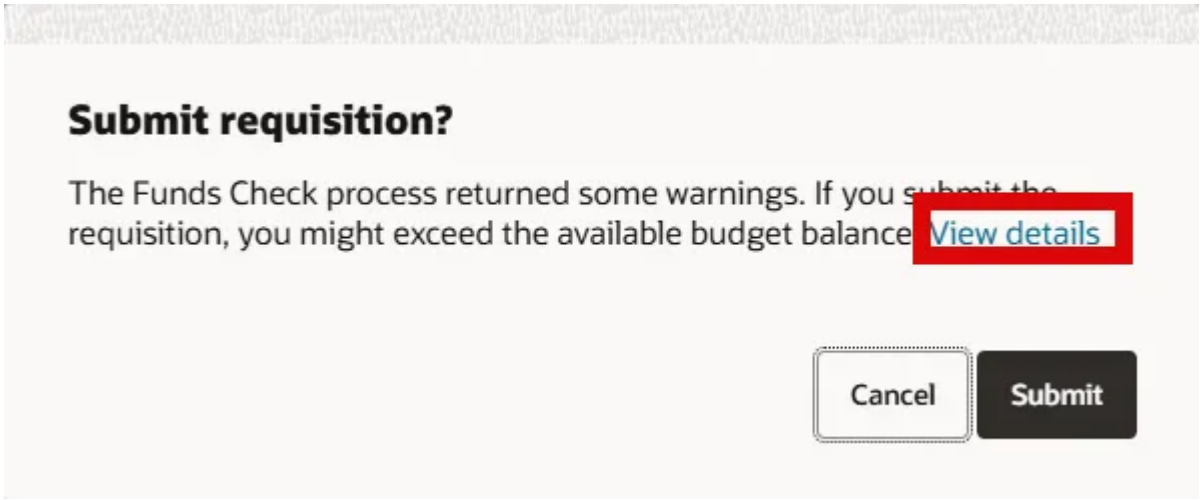
Step 15. On the **Cart** tab section, select the **Submit** button, in the upper right corner.

Image



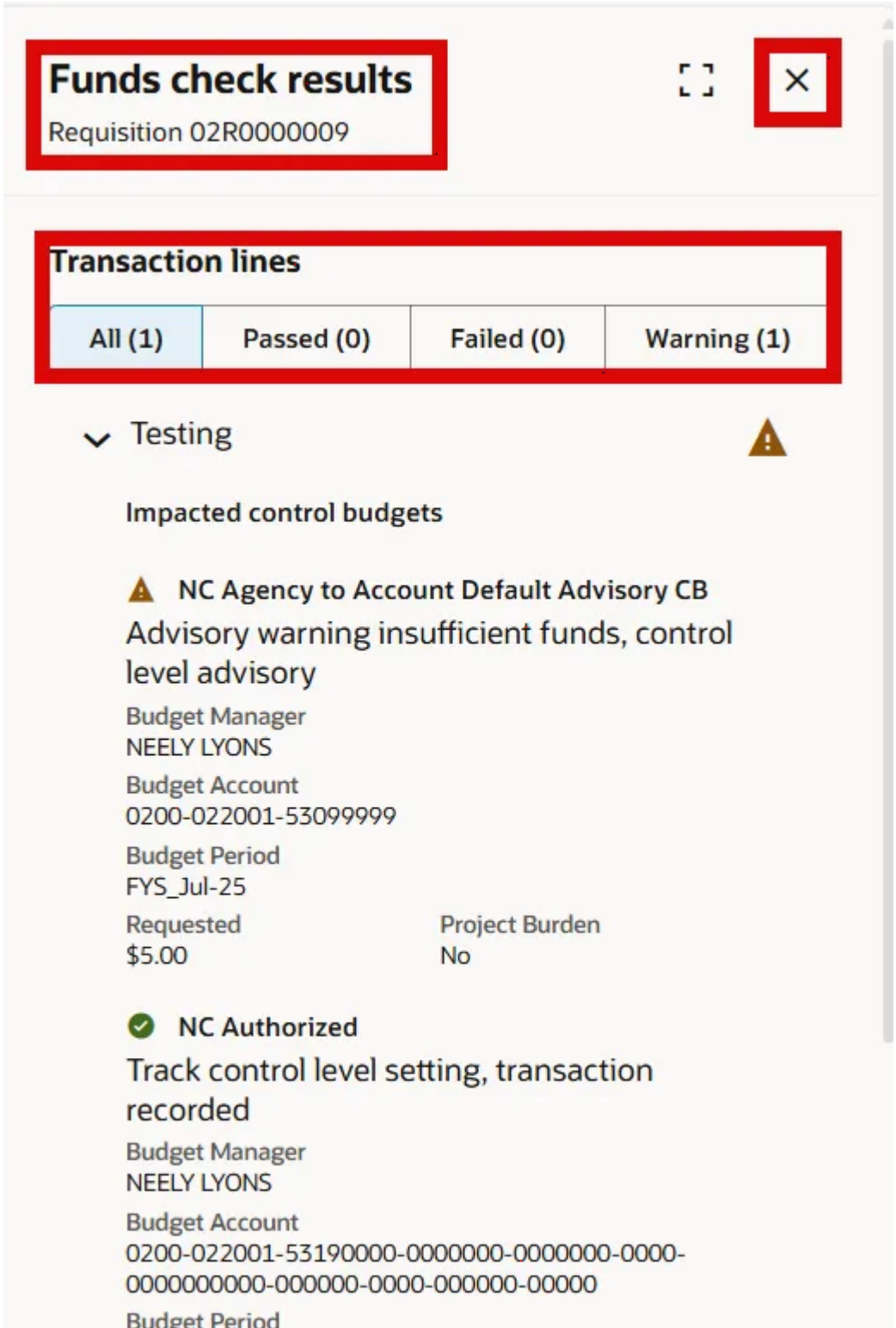
Step 16. A **Pop-Up Box** will appear, if there are any **Funds Check warnings**.

Image



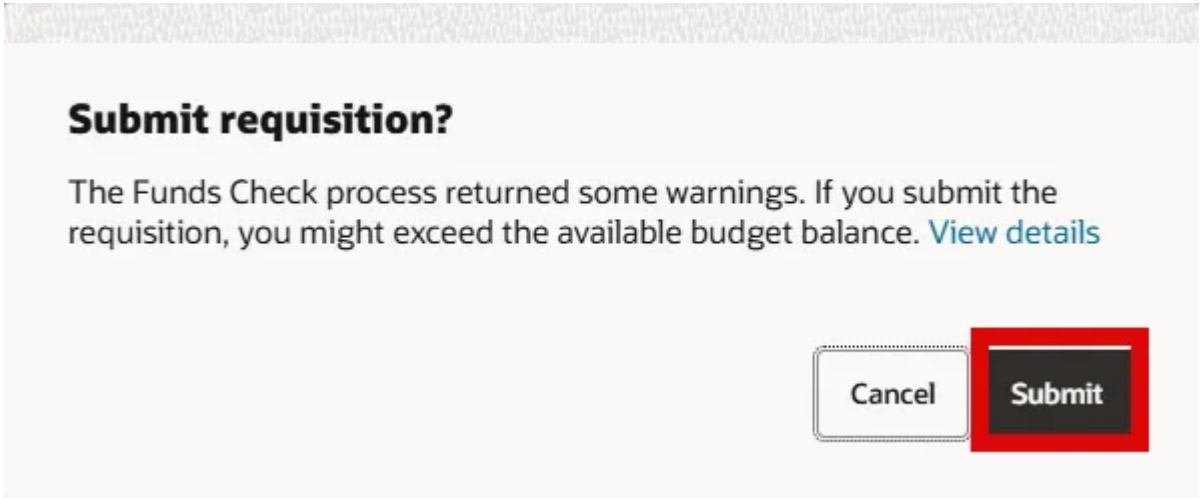
Step 17. Select the **View Details** link to see any warning details. Review the **Transaction Line Status** and select the **X** to exit.

Image


Funds check results
Requisition 02R0000009
Transaction lines
All (1)
Passed (0)
Failed (0)
Warning (1)
Testing
Impacted control budgets
NC Agency to Account Default Advisory CB
Advisory warning insufficient funds, control level advisory
Budget Manager
NEELY LYONS
Budget Account
0200-022001-53099999
Budget Period
FYS_Jul-25
Requested
$5.00
Project Burden
No
NC Authorized
Track control level setting, transaction recorded
Budget Manager
NEELY LYONS
Budget Account
0200-022001-53190000-0000000-0000000-0000-0000000000-000000-0000-000000-00000
Budget Period

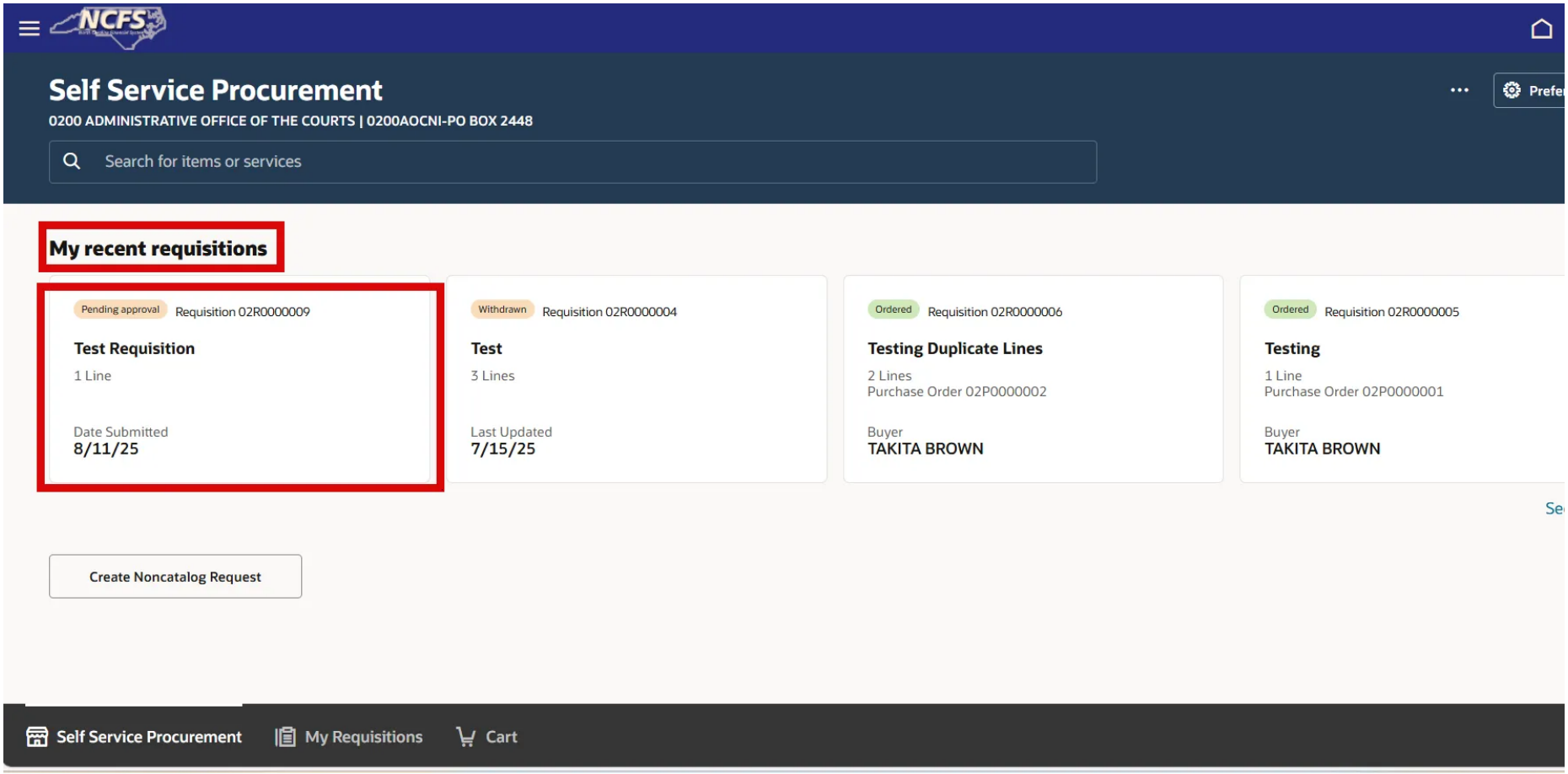
Step 18. The Warning window will reappear, select the **Submit** button.

Image



Step 19. On the **Requisitions** page, under ***My Recent Requisitions*** section, you can view the recently submitted **Requisition** and its status.

Image



Wrap-Up

Create expense requisitions in NCFS using the steps above.

Additional Resources

- Instructor Led-Trainings (ILT)
  - PO101: PO Procurement Requestor

- Web-based Trainings (WBT)
  - PO107: PO Advanced Procurement Requestor

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