

PeopleSoft Requisition Creation

Purchasing > Requisitions > Add/Update Requisitions

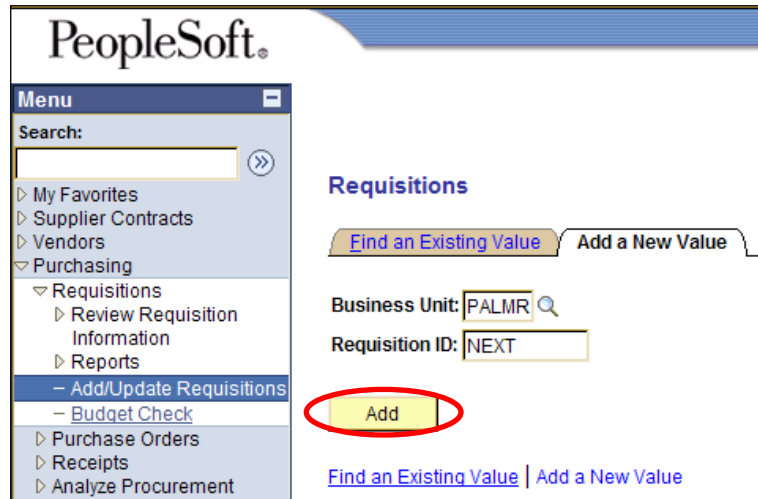
1. Add a New Value. p. 1
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12. Save. p. 14

Entering a New Requisition

Purchasing > Requisitions > Add/Update Requisitions

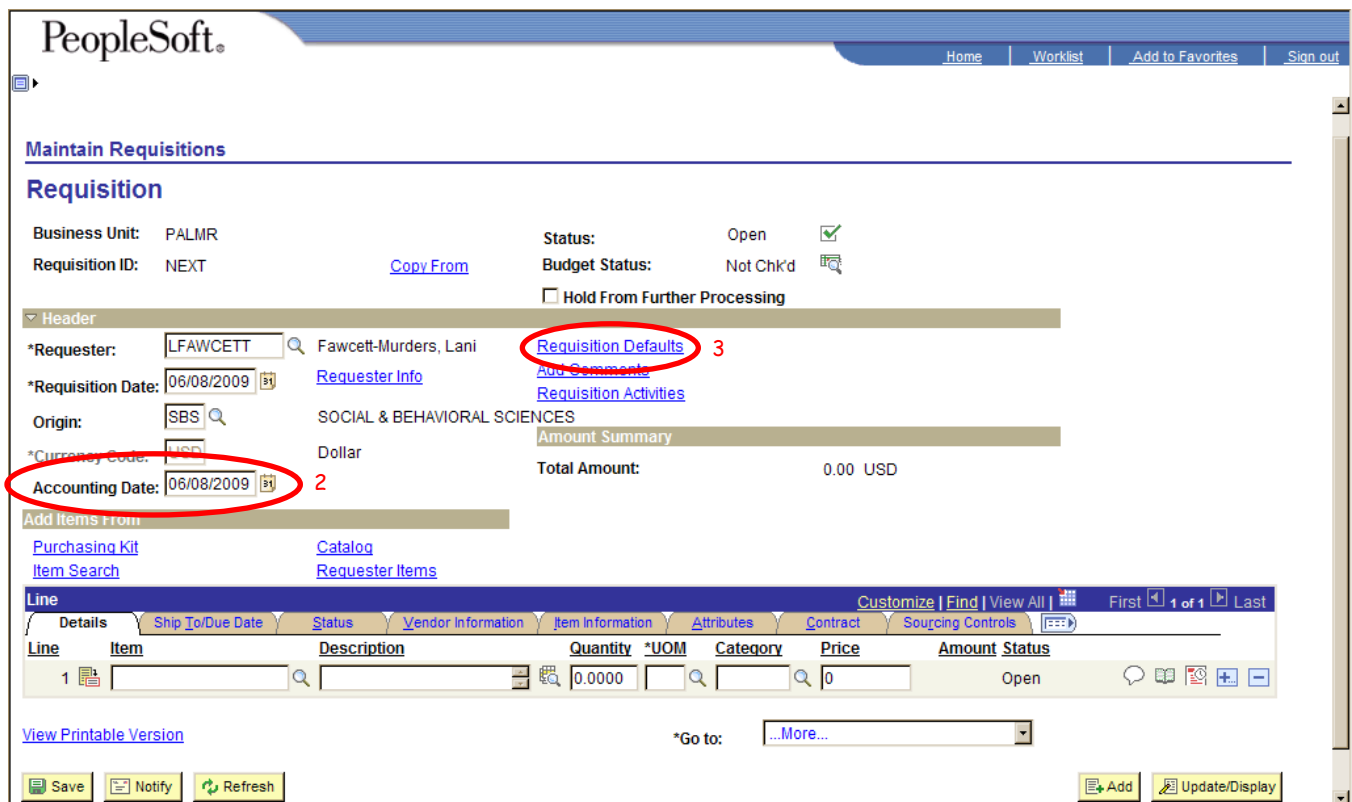
Do not enter a Requisition ID number. "NEXT" should always appear in the box and the system will automatically assign the next available number.

1. Click "Add."



The requisition form will automatically populate the requisition Header with assigned defaults. The requisition number will be assigned when the requisition is saved.

NOTE: Turn on Caps Lock before entering any information on a Req.



2. **Accounting Date** must be in the correct Fiscal Year. If this Req is for next year, you **MUST** change this date to 07/01.
3. Click on [Requisition Defaults](#).

Requisition Defaults

NOTE: These defaults can be overridden on the Requisition Line, Schedule and Distribution.

Maintain Requisitions

Requisition Defaults

Business Unit: PALMR Requisition Date: 05/22/2009
 Requisition ID: NEXT Status: Open

Default Options

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Header

Vendor: 0000020165 WEST COAST ERGONOMIC DESIGN Unit of Measure: EA
 Location: 000000
 Category: 441000 [Vendor Lookup](#)

Item Defaults

Ship To: CENTRAL CENTRAL RECEIVING *Distribute by: Quantity
 Due Date: 05/30/2009 *Liquidate by: Amount
 Ultimate Use Code: [Modify Shipping Address](#)

Amount Summary

SpeedChart:

Distributions

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Budget Date	Location
1		PALMR		11	561100	67800	10	0000000	05/22/2009	A-007

OK Cancel Refresh

Enter the Vendor and the Due Date. If the chartfields (Distributions) don't default in, fill them in also.

Vendor

- If you don't know what vendor to use or you expect Purchasing to select the vendor for you, enter **BEST VENDR** as the Vendor ID.
- If you know the Vendor Name, but not the ID number, use the [Vendor Lookup](#) link to search for the Vendor ID.
- If you want a certain vendor who is not found in Vendor Lookup, enter **NEW VENDR** as the Vendor ID. You will also need to list the Vendor name, address and contact information in the body of the requisition in the "REQ-INFO" Requisition Comment. (Step 2)

Note: Although you may have used this Vendor in the past, they may not be "current / active" in the Vendor System if it has been a long time since we have issued them a Purchase Order or payment, or if you purchased from them using your CAL-Card.

Due Date

- Enter the date the items are required.

Distributions - Distribution details may default in from your Requester Set-up. You may make any necessary changes to the distribution information here. Change the entire account string or part of it. You must fill in a value for Fund, Dept, Program, Class, and Project.

When finished, click the yellow "OK" button. You are returned to the main Requisition page.

4. Click on [Add Comments](#).

PeopleSoft. Home | Worklist | Add to Favorites | Sign out

Maintain Requisitions

Requisition

Business Unit: PALMR Status: Open
 Requisition ID: NEXT Budget Status: Not Chk'd
 Hold From Further Processing

▼ Header

*Requester: LFAWCETT Fawcett-Murders, Lani [Requisition Details](#)
[Add Comments](#) (circled in red)
[Requisition Activities](#)

*Requisition Date: 06/08/2009 [Requester Info](#)

Origin: SBS SOCIAL & BEHAVIORAL SCIENCES

*Currency Code: USD Dollar

Accounting Date: 06/08/2009

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1			0.0000			0		Open

View Printable Version *Go to: ...More...

Save | Notify | Refresh Add | Update/Display

Header Comments

Header Comments

Business Unit: PALMR Requisition Date: 06/05/2009
 Requisition ID: NEXT Status: Open

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) (circled in red) Comment Status: Active Inactivate +

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ PALMR-NEXT

OK Cancel Refresh

Click [Copy Standard Comments](#) to access the comment that needs to be added to every requisition.

Standard Comments

Comments

*Action: Copy Comment

Comment Type: REQ

Comment ID: INFO

*Effective Date: 07/08/2009 *Status: Active

Description: DEFAULT COMMENTS

Short Desc: DEFAULT

Comments:

REQUISITION DEPT:
FINAL DESTINATION:
VENDOR CONTACT INFO:

OK Cancel Refresh

Enter **REQ** as the Comment Type and **INFO** as the Comment ID, then click OK.

Header Comments

Business Unit: PALMR Requisition Date: 06/05/2009
Requisition ID: NEXT Status: Open

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) Comment Status: Active Inactivate +

REQUISITION DEPT:
FINAL DESTINATION:
VENDOR CONTACT INFO:

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Attach View Delete Email

OK Cancel Refresh

Fill in the requested information. Un-check the **Send to Vendor** checkbox.

Please include the following standard Requisition Comments in your requisitions as appropriate:

- "REQ-INFO" for every requisition.
- "REQ-REPR" for all equipment repairs
- "REQ-SERV" for all services
- "REQ-FAC" (for Facilities Dept. use only)


Complete and/or delete items within the Comment as applicable. Providing this information will expedite the processing of your order.

When you state a Deadline Date on any Comment, this should be an absolute, critical deadline that must be met. Otherwise, leave the deadline date blank, so that Purchasing will obtain the items with normal (non-rush) delivery and any services as soon as practical.

<p>Standard Comment Type Standard Comment ID</p> <p>When to Use this Comment</p>	<p>FULL COMMENT</p> <p><i>(complete and/or delete items within the Comment as applicable)</i></p>
<p>REQ INFO</p> <p>Use this Comment for EVERY REQUISITION.</p> <p>This comment contains the information which you used to type onto your paper requisitions.</p> <p>If you're using Vendor ID "NEW VENDR" then include the name, address, and contact information for that Vendor.</p> <p>If there are back-up documents for the Requisition, indicate how you are going to send those back-up documents to Purchasing.</p>	<p>FOR FISCAL YEAR: FY: ____</p> <p>REQUESTOR (Requesting Dept.) INFO: Requestor Name / Phone: End User Name / Phone: Accountable Dept:</p> <p>= Complete and/or delete items below as applicable: PRE-ASSIGNED PO# (if applicable): NEW VENDOR INFORMATION (vendor ID "NEW VENDR"): Company Name: Company Address: Sales Rep. / Contact Name: Phone: ____ Fax: ____ Cell: ____ E-Mail: _____</p> <p>EXISTING VENDOR CONTACT INFORMATION: Sales Rep. / Contact Name: Phone: ____ Fax: ____ Cell: ____ E-Mail: _____</p> <p>HOW BACK UP DOCUMENTS WILL BE SENT TO PURCHASING: Campus Mail; FAX: 760-471-7061 e-mail to Purchasing@palomar.edu</p> <p>DEADLINE DATE TO RECEIVE ITEMS / SERVICE: DELIVER: CENTRAL RCVG; PICK-UP from Vendor by (Staff) _____</p> <p>WAREHOUSE DELIVERY INFO: DELIVER TO: Bldg. /Room _____ Name: ____ FINAL DESTINATION will be: Bldg. /Room _____</p>

<p>Standard Comment Type Standard Comment ID</p> <p>When to Use this Comment</p>	<p>FULL COMMENT</p> <p><i>(complete and/or delete items within the Comment as applicable)</i></p>
<p>REQ REPR</p> <p>Use this Comment for any EQUIPMENT REPAIR.</p> <p>Describe the equipment, and the problem and current location.</p> <p>Indicate who will be responsible for scheduling / coordinating the repair (staff or vendor?)</p> <p>Indicate any absolute, critical deadline date for the repair. State if the repair will be performed on-site or at the Vendor's facility.</p>	<p>= Complete and/or delete items below as applicable:</p> <p>DESCRIBE EQUIPMENT: Brand/Mfg: ___ Model: ___ S/N: _____ Asset Tag: ___</p> <p>PROBLEM: CURRENT LOCATION OF THE EQUIPMENT: Bldg/Room _____</p> <p>JOB COORDINATION (Select one):</p> <ul style="list-style-type: none"> = VENDOR TO CONTACT STAFF: Vendor is to contact (Palomar Staff Name) at (760) 744-1150, EXT. ___, to schedule / coordinate the work (and the pick up and the return of the equipment). = STAFF TO CONTACT VENDOR: (Palomar Staff Name) at (760) 744-1150, EXT. ___, will contact Vendor to schedule / coordinate work (and/ or will take equipment to vendor for repair and will pick back up from Vendor after repair completed). <p>DEADLINE FOR EVALUATION AND / OR REPAIR: REPAIR TO BE PERFORMED: ON-SITE or at VENDOR FACILITY</p>
<p>REQ SERV</p> <p>Use this Comment when you need SERVICES TO BE PERFORMED.</p> <p>Indicate who will be responsible for scheduling / coordinating the services (staff or vendor?)</p> <p>Indicate any absolute, critical deadline date for the services. State if the services will be performed on-site or at the Vendor's facility.</p>	<p>= Complete and/or delete items below as applicable:</p> <p>JOB COORDINATION (Select one):</p> <ul style="list-style-type: none"> = VENDOR TO CONTACT STAFF: Vendor is to contact (Palomar Staff Name) at (760) 744-1150, EXT. ___, to schedule / coordinate the work. = STAFF TO CONTACT VENDOR: (Palomar Staff Name) at (760) 744-1150, EXT. ___, will contact Vendor to schedule / coordinate work. <p>DEADLINE FOR COMPLETION: SERVICES TO BE PERFORMED: ON-SITE or at VENDOR FACILITY.</p>

<p>Standard Comment Type Standard Comment ID</p> <p>When to Use this Comment</p>	<p>FULL COMMENT</p> <p><i>(complete and/or delete items within the Comment as applicable)</i></p>
<p>REQ FAC</p> <p>The District Facilities Department should use this Comment for SERVICES TO BE PERFORMED.</p> <p>Indicate who will be responsible for scheduling / coordinating the services (staff or vendor?)</p> <p>Indicate any absolute, critical deadline date for the services. State location of the services.</p>	<p>= Complete and/or delete items below as applicable:</p> <p>JOB COORDINATION (Select one):</p> <p>= VENDOR TO CONTACT STAFF: Vendor is to contact (Palomar Staff Name) at (760) 744-1150, EXT. __, to schedule / coordinate the work.</p> <p>= STAFF TO CONTACT VENDOR: (Palomar Staff Name) at (760) 744-1150, EXT. __, will contact Vendor to schedule / coordinate work.</p> <p>== UNLESS OTHERWISE DIRECTED BY FACILITIES DEPT., VENDOR IS TO CHECK IN AT THE FACILITIES DEPT. IN RS-1 (OR WITH JIMMY DIAZ OF PCEC FACILITIES) EACH DAY PRIOR TO STARTING WORK.</p> <p>DEADLINE FOR COMPLETION: WORK / SERVICE LOCATION: DISTRICT / INTERNAL WORK ORDER: WR</p>

You may also add Header comments  to include the vendor's quotation number, tax exemptions, special shipping instructions, or to communicate to the Purchasing Dept any information about this order. Ensure that the comments entered are clear and concise.

Header Comments

Business Unit: PALMR Requisition Date: 05/22/2009
Requisition ID: NEXT Status: Open

*Sort Method: *Sort Sequence:

Comments Find | View All First Last

[Copy Standard Comments](#)

Comment Status: Active

CONTRACT#0405-17.
SHIP TO THE ATTENTION OF: KAREN DAVIS.

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Email

From -> REQ PALMR-NEXT

Click the yellow 'OK' button. You are returned to the Requisition main page. Note that the [Add Comments](#) link has changed to [Edit Comments](#), indicating that Header Comments exist.


5. Click on the button to enter an item description. This should be the basic information needed by the vendor to fill the order. Click 'OK' to return to the main Requisition page.
NOTE: If this is an emergency req, use EMERGENCY as the first word in the description.
6. Enter the Quantity, Unit of Measure (UOM), Category*, and Unit Price.

***Category** is the account number with two exceptions. Anything computer-related (hardware, software, etc.) has a category of **COMPUTER**. Audio/Visual equipment has a category of **AV**. If you use one of these Categories, you'll need to enter the actual account number in the Account number box on the distribution line.

7. Click and note the Req number (Requisition ID) that has been assigned to the Requisition.

If multiple lines are required, click on the Add button. In the prompt box, enter the number of lines desired and click OK. Complete additional lines as described above. Save after each line.

8. OPTIONAL - Line Comments

From the main Requisition page, click the callout bubble  at the right side of the line to add line comments. Enter additional identifying information for a specific line in the Line Comments. Such information could be size, color, fabric style, packaging instructions or the name of the teacher ordering the item. If the vendor needs this information, make sure the **Send to Vendor** checkbox is checked.

You can also use this area to communicate to the Purchasing Department any additional information about this line item. In this case, make sure the **Send to Vendor** checkbox is not checked.

Line Comments

Business Unit: PALMR Requisition Date: 05/22/2009
 Requisition ID: NEXT Status: Open Line: 1

*Sort Method: *Sort Sequence:

Comments Find | View All First Last

[Copy Standard Comments](#) [Copy Item Specs](#) Comment Status: Active


Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Email

From -> REQ PALMR-NEXT

Click the yellow 'OK' button.

The callout bubble now has dots in it  to indicate that the line contains comments.

Maintain Requisitions

Requisition

Business Unit: PALMR Status: Open
 Requisition ID: NEXT [Copy From](#) Budget Status: Not Chk'd

Hold From Further Processing

Header

*Requester: Davis, Kathy [Requisition Defaults](#)
 *Requisition Date: [Requester Info](#) [Add Comments](#)
 Origin: Information Systems [Requisition Activities](#)

*Currency Code: Dollar Amount Summary

Accounting Date: Total Amount: 371.20 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line Customize | Find | View All | First Last


Details Ship To/Due Date Status Vendor Information Item Information Attributes Contract Sourcing Controls

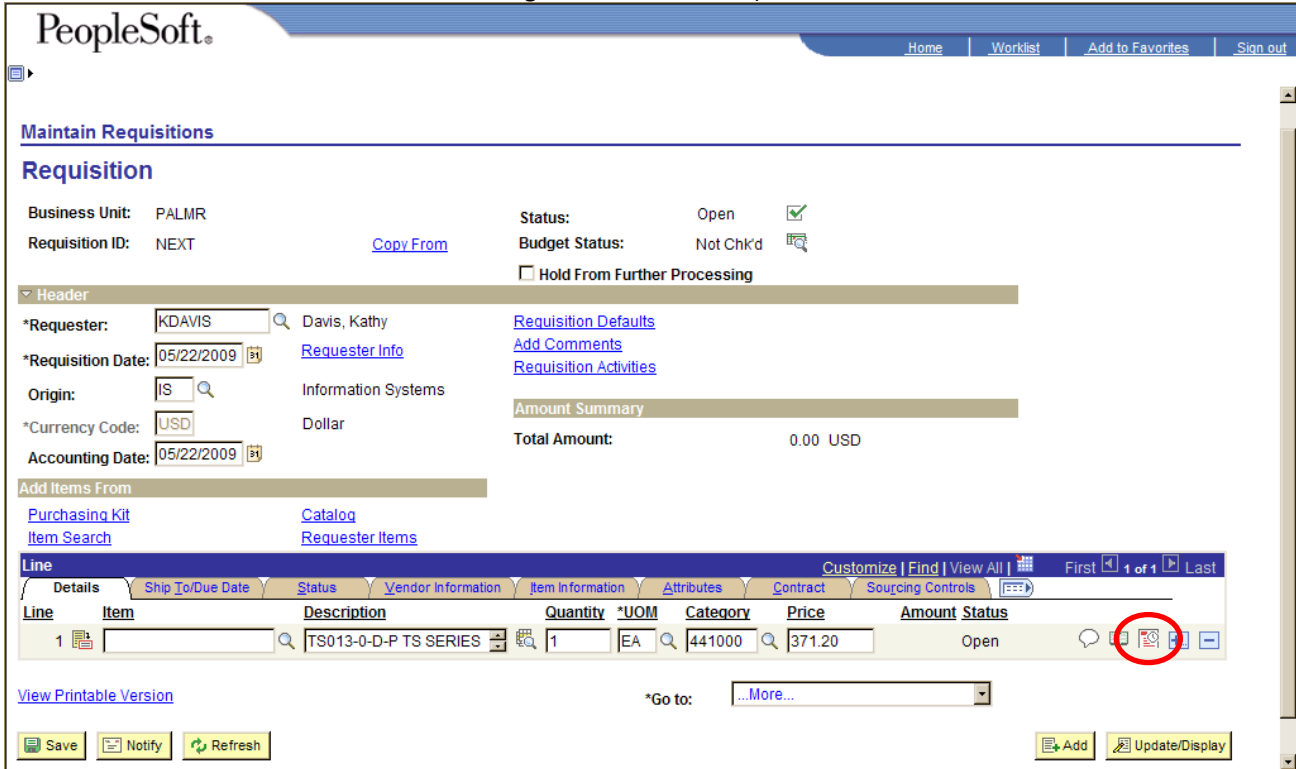
Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1	<input type="text" value=""/>	<input type="text" value="TS013-0-D-P TS SERIES"/> <input type="button" value="🔍"/>	1.0000	EA	441000	371.20000	371.20	Open

[View Printable Version](#) *Go to:

9. OPTIONAL - Change Schedule and Distribution Information on a Line

The schedule and distribution pages must be completed for each line ONLY if it's different than the default information entered earlier.

 Click on the Schedule icon near the right side of the requisition line.



PeopleSoft Home Worklist Add to Favorites Sign out

Maintain Requisitions

Requisition

Business Unit: PALMR Status: Open
 Requisition ID: NEXT Budget Status: Not Chk'd
 Hold From Further Processing

Header

*Requester: KDAVIS Davis, Kathy [Requisition Defaults](#)
[Requester Info](#)
[Requisition Activities](#)

*Requisition Date: 05/22/2009

Origin: IS Information Systems

*Currency Code: USD Dollar

Accounting Date: 05/22/2009

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)


Line Customize | Find | View All | First 1 of 1 Last

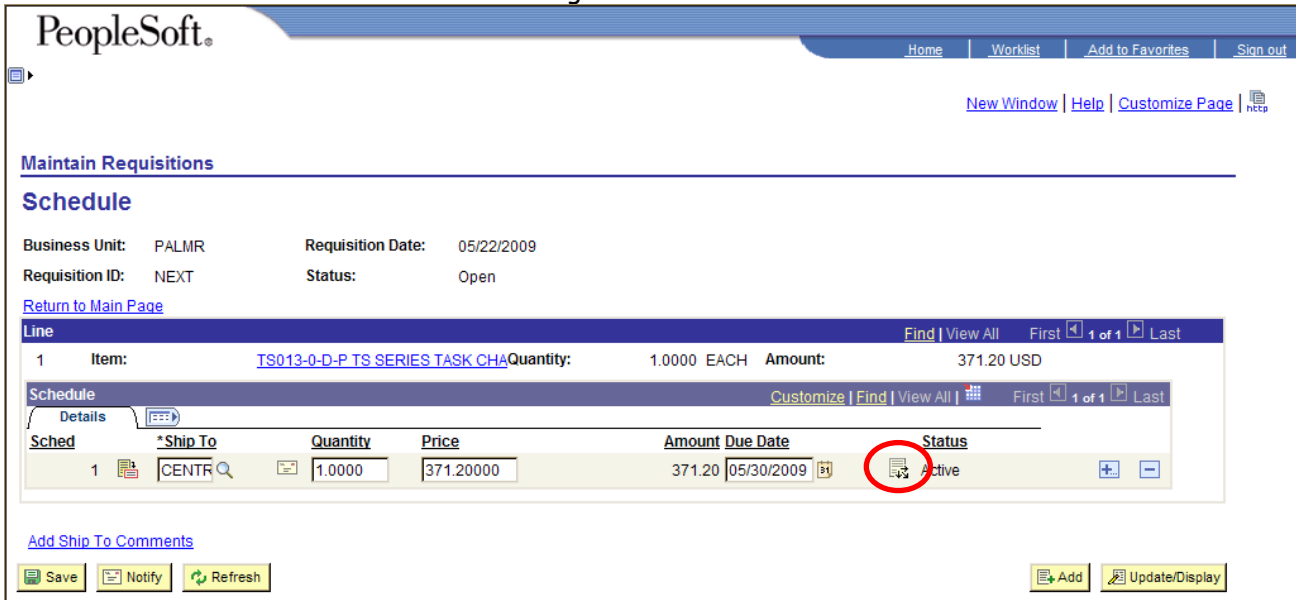
Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1		TS013-0-D-P TS SERIES	1	EA	441000	371.20		Open

Note: A red circle highlights the 'Schedule' icon in the right-hand column of the table.


[View Printable Version](#) *Go to:

Save Notify Refresh Add Update/Display

 Click on the Distributions icon near the right side of the schedule.



PeopleSoft Home Worklist Add to Favorites Sign out

[New Window](#) [Help](#) [Customize Page](#) 

Maintain Requisitions

Schedule

Business Unit: PALMR Requisition Date: 05/22/2009
 Requisition ID: NEXT Status: Open

[Return to Main Page](#)

Line Find | View All | First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Amount
1		TS013-0-D-P TS SERIES TASK CHA	1.0000	EACH	371.20 USD

Schedule Customize | Find | View All | First 1 of 1 Last

Sched Details

Sched	*Ship To	Quantity	Price	Amount	Due Date	Status
1	CENTR	1.0000	371.20000	371.20	05/30/2009	Active

Note: A red circle highlights the 'Distributions' icon in the right-hand column of the table.

[Add Ship To Comments](#)

Save Notify Refresh Add Update/Display

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: [TS013-0-D-P TS SERIES TASK CHA](#)

Line: 1 Status: Active

Schedule: 1

Ship To: CENTRAL CENTRAL Quantity: 3.0000 EA

*Distribute by: Open Quantity: 3.0000

*Liquidate by: Amount: 1,113.60 USD

SpeedChart: [Multi-SpeedCharts](#)

Distributions Cust

Chartfields

Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	*Location
1	Open	100.0000	3.0000	1,113.60	PALMR	441000	11	361100	60110	10	0000000	AA-130

OK Cancel Refresh

The distribution information defaulted in from the Requisition Defaults. You may change it here if necessary. At the right end of the page there are  and  icons to add or delete distribution lines. If multiple distributions are required, click on the Add button.

Explorer User Prompt X

Script Prompt:

Enter number of rows to add:

In the prompt box, enter the number of rows desired and click OK. (If the prompt box does not appear, click the colored bar at the top of your screen to allow scripted windows.)

Distributing by Quantity or Amount

Notice the **Distribute by:** box indicating "Quantity." Currently the requisition is distributed by quantity. The **Amount** field is unavailable for editing.

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: [TS013-0-D-P TS SERIES TASK CHA](#)

Line: 1 Status: Active

Schedule: 1

Ship To: CENTRAL CENTRAL Quantity: 3.0000 EA

*Distribute by: Open Quantity: 3.0000

*Liquidate by: Amount: 1,113.60 USD

SpeedChart: [Multi-SpeedCharts](#)

Distributions

Chartfields

Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Alt Acct	Fund	Dept
1	Open	100.0000	3.0000	1,113.60	PALMR	441000		11	361100

- If you need to split the distribution based on percentage or quantity, leave the **Distribute by:** indicator as "Quantity." Change the percentages or quantities to the required values and enter the chartfield information.

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: [TS013-0-D-P TS SERIES TASK CHA](#)
 Line: 1 Status: Active
 Schedule: 1
 Ship To: CENTRAL CENTRAL Quantity: 3.0000 EA
 *Distribute by: **Quantity** Open Quantity: 3.0000
 *Liquidate by: Quantity Amount: 1,113.60 USD
 SpeedChart: [Multi-SpeedCharts](#)

Distributions										
Chartfields										
Distrib	Status	Percent	Quantity	Amount	GL Unit	Account	Alt Acct	Fund	Dept	
1	Open	66.6667	2.0000	742.40	PALMR	441000		11	361100	
2	Open	33.3333	1.0000	371.20	PALMR	441000		11	363100	

- If you need to split the distribution based on dollar amount, change the drop down box to "Amount." Notice that the "Amount" data box is now available to edit. Enter the amounts and chartfield information.

Maintain Requisitions


Distribution

Requisition ID: NEXT Item: [TS013-0-D-P TS SERIES TASK CHA](#)
 Line: 1 Status: Active
 Schedule: 1
 Ship To: CENTRAL CENTRAL Quantity: 1.0000 EA
 Distribute by: **Amount** Open Amount: 371.200
 Liquidate by: Amount Amount: 371.20 USD
 SpeedChart: [Multi-SpeedCharts](#)

Distributions										
Chartfields										
Distrib	Status	Percent	Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	73.0603	271.20	PALMR	441000	11	561100	67800	10	0000000
2	Open	26.9397	100.00	PALMR	441000	41	561100	67800	10	0841650

OK Cancel Refresh

10. Budget check the Req.

When you're finished entering all the information, click on the budget check icon  located near the top of the page. This will verify that there's sufficient budget to cover the purchase, and more importantly, will pre-encumber the money so it can't be spent on something else.

Maintain Requisitions**Requisition**

Business Unit: PALMR

Requisition ID: 0000000524

Status:

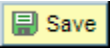
Open

Budget Status:

Valid

 Hold From Further Processing

11. If the Req passes the budget check (the Budget Status is **Valid**) and it's ready to be approved, click the green check mark. The status will change from Open to Pending (pending approval). **If the Req is not ready for approval, don't click the check mark!**

12. Click  one last time.

Changing Requisition Defaults

If it is determined that the Distribution, Ship To or other information entered into the Requisition Defaults is incorrect, the Requester can change the default values and then click OK. Doing so, however, will change the default information for all lines on the requisition.

After clicking OK, a "Retrofit" message box appears. The Requester can select those values to be changed on the lines by checking the box next to the value. If all boxes are to be checked, the "Mark All" link can be clicked. Click OK to apply the information.

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit: PALMR Requisition Date: 04/06/2007
 Requisition ID: NEXT Status: Open

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
 For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
 Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
 Select 'Apply to All Distributions' to apply changes to all distribution lines on the requisition.

[Mark All](#) [Unmark All](#)

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Ship To	CENTRAL	
<input checked="" type="checkbox"/>	1	Pct	100	
<input checked="" type="checkbox"/>	1	GL Unit	PALMR	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Account	441000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Fund	11	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Dept	534100	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Program	67750	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Class	10	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Project	0000000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Budget Date	2007-04-06	<input type="checkbox"/>

OK Cancel Refresh

Remember: Changing the Requisition Defaults and responding positively to the Retrofit box will change the information on all lines of the requisition. To change the information on only one line, change the information directly on the line itself.