

# PeopleSoft Finance v9

## Entering a New Requisition

**Purchasing > Requisitions > Add/Update Requisitions**

NEW VERSION

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Requisitions ▾ > Add/Update Requisitions

Whether you use the Main Menu option at the top, have the Menu – Classic or Menu open on the page, the navigation to add/update a req. is the same: **Purchasing > Requisitions > Add/Update Requisitions**

The Breadcrumbs at the top show the navigation.

Main Menu ▾

**Search Menu:**

- Palomar Customizations ▶
- Supplier Contracts ▶
- Items ▶
- Suppliers ▶
- Purchasing ▶
- eProcurement ▶
- Services Procurement ▶
- Program Management ▶
- Project Costing ▶
- Accounts Payable ▶
- Asset Management ▶
- Banking ▶
- Commitment Control ▶
- General Ledger ▶
- Real Time Bottom Line ▶
- Set Up Financials/Supply Chain ▶
- Background Processes ▶
- Worklist ▶
- Tree Manager ▶
- Reporting Tools ▶
- PeopleTools ▶
- Tax Center
- Change My Password
- My Personalizations
- My System Profile

Menu - Classic

Search:

- My Favorites
- Palomar Customizations
- Supplier Contracts
- Items
- Suppliers
- Purchasing
- eProcurement
- Services Procurement
- Program Management
- Project Costing
- Accounts Payable
- Asset Management
- Banking
- Commitment Control

- Purchasing
- eProcurement
- Services Procurement
- Program Management
- Project Costing
- Accounts Payable

- Requisitions
- Purchase Orders
- Receipts
- Procurement Cards
- Analyze Procurement

- Reconcile Requisitions ▶
- Review Requisition Information ▶
- Reports ▶
- Add/Update Requisitions

# Entering a New Requisition

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."

## Requisitions

Find an Existing Value

Add a New Value

Business Unit: PALMR

Requisition ID: NEXT

Add

Find an Existing Value | Add a New Value

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. **Requisition Name:** **OPTIONAL**- You can give the requisition a name for easier searches. If left blank the default is the requisition number.

Maintain Requisitions

### Requisition

Business Unit PALMR  
Requisition ID NEXT  
Requisition Name  Copy From

Status Open  
Budget Status Not Ch'kd  
 Hold From Further Processing

Header

\*Requester KDAVIS Kathleen D. Davis  
\*Requisition Date 11/20/2014  
Origin IS Information Systems  
\*Currency Code USD Dollar  
Accounting Date 11/20/2014

Requisition Defaults Add Comments  
Requisition Activities

Add Items From

Purchasing Kit Catalog  
Item Search Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Printable Version View Approvals \*Go to More...

Save Notify Refresh Add Update/Display

The main differences on this page are 1) the Requisition Name: defaults to the Requisition ID when req. is saved but you can name the req. for easier searches and 2) the location of the Requisition Defaults and Add Comments.

3. Click on [Requisition Defaults](#).

Maintain Requisitions

Requisition

Business Unit PALMR      Status Open  
 Requisition ID NEXT      Budget Status Not Chk'd

Requisition Name  Copy From       Hold From Further Processing

**Header**

\*Requester KDAVIS Kathleen D. Davis  
 \*Requisition Date 11/20/2014 Requisition Info  
 Origin IS Information Systems  
 \*Currency Code USD Dollar  
 Accounting Date 11/20/2014

**Requisition Defaults** Add Comments      Amount Summary  
 Requisition Activities      Total Amount 0.00 USD

Add Items From

Purchasing Kit      Catalog  
 Item Search      Requester Items

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Printable Version      View Approvals      \*Go to ...More...

Save    Notify    Refresh      Add    Update/Display

**Requisition Defaults**

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

Requisition Defaults

Business Unit PALMR      Requisition Date 10/27/2014  
 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, only non-blank values are assigned.

**Line**

Supplier       Unit of Measure   
 Category       Supplier Location   
 Supplier Lookup

**Schedule**

Ship To CENTRAL CENTRAL RECEIVING      \*Distribute By Quantity  
 Due Date       \*Liquidate By Amount  
 Ultimate Use Code   
 Attention To       One Time Address

**Distribution**

SpeedChart

**Distributions**

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Budget Date
1		PALMF		11	561100	67800	10	0000000	10/27/2014

OK    Cancel    Refresh

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

## Supplier

- The supplier must be active in PeopleSoft to be able to submit a requisition.
- To add a new vendor, obtain a W-9 from the vendor and submit a new vendor request here:  
<https://www.palomar.edu/businessservices/purchasing-forms-2/>

**Note:** Although you may have used this Supplier 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 CalCard.

## Due Date

- Enter the date the items are required, or the last day of the fiscal year for an Open PO.

**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, Program, and Project.

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

**\*\* NOTE: COMPUTER is no longer required in the CATEGORY for Technology Equipment or Software. Routing for these items is done by the expenditure accounts listed below:**

### WORKFLOW ROUTING FOR TECHNOLOGY EQUIPMENT

- 515300 Software Licensing Fees
- 565200 Maintenance Agreement, Software
- 644700 Equipment, Technology Instructional > \$4,999
- 644750 Equipment, Technology Instructional < \$4,999
- 644800 Equipment, Technology Non-Instructional > \$4,999
- 644850 Equipment, Technology Non-Instructional < \$4,999
- 644900 Software , Instructional > \$4,999
- 644950 Software, Non-Instructional > \$4,999

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

Maintain Requisitions

### Requisition

Business Unit PALMR      Status Open  
Requisition ID NEXT      Budget Status Not Chk'd  
Requisition Name \_\_\_\_\_ Copy From       Hold From Further Processing

**Header**

\*Requester KDAVIS Kathleen D. Davis  
\*Requisition Date 11/20/2014      Requester Info  
Origin IS Information Systems  
\*Currency Code USD Dollar  
Accounting Date 11/20/2014

Requisition Defaults      **Add Comments**      Amount Summary  
Requisition Activities      Total Amount 0.00 USD

Add Items From

Purchasing Kit      Catalog  
Item Search      Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Printable Version      View Approvals      \*Go to [...More...]

Save      Notify      Refresh      Add      Update/Display

## Header Comments

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

Header Comments Help

Business Unit PALMR                      Requisition Date 11/19/2014  
Requisition ID NEXT                      Status Open

---

\*Sort Method       \*Sort Sequence      

Comments Find | View All    First 1 of 1 Last

Use Standard Comments      Comment Status Active     

Send to Supplier       Show at Receipt  
 Show at Voucher       Approval Justification

Associated Document

Attachment	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
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From -> REQ PALMR-NEXT

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

Standard Comments Help

Comments

\*Action Copy Comment

Comment Type **REQ** Comment ID **INFO**

\*Effective Date 10/29/2014 \*Status Active

Description BASIC INFO FOR PURCHASING DEPT

Short Desc BASIC INFO

Comments FOR FISCAL YEAR: FY:\_\_\_\_  
REQUESTOR (Requesting Dept.) INFO:  
Requestor Name / Phone:  
End User Name / Phone:  
Accountable Dept:

OK Cancel Refresh

Fill in the requested information.  
Make sure the "Send to Supplier" box is checked, this ensures Purchasing can see what you entered.

Header Comments Help

Business Unit PALMR Requisition Date 10/29/2014  
Requisition ID NEXT Status Open

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

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

FOR FISCAL YEAR: FY:\_\_\_\_  
REQUESTOR (Requesting Dept.) INFO:  
Requestor Name / Phone:  
End User Name / Phone:  
Accountable Dept:

**Send to Supplier**  Show at Receipt

Show at Voucher

Associated Document

Attachment Attach View Delete  Email

OK Cancel Refresh

- Opens the comment box to full view.

Spell checks.

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.

Standard Comment Type Standard Comment ID  When to Use this Comment	FULL COMMENT  <i>(complete and/or delete items within the Comment as applicable)</i>
<p><b>REQ INFO</b></p> <p><b>Use this Comment for EVERY REQUISITION.</b></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><b>Standard Comment Type</b> <b>Standard Comment ID</b></p> <p><b>When to Use this Comment</b></p>	<p><b>FULL COMMENT</b></p> <p><i>(complete and/or delete items within the Comment as applicable)</i></p>
<p><b>REQ REPR</b></p> <p><b>Use this Comment for any EQUIPMENT REPAIR.</b></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"> <li>= 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).</li> <li>= 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).</li> </ul> <p>DEADLINE FOR EVALUATION AND / OR REPAIR: REPAIR TO BE PERFORMED: ON-SITE or at VENDOR FACILITY</p>
<p><b>REQ SERV</b></p> <p><b>Use this Comment when you need SERVICES TO BE PERFORMED.</b></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"> <li>= VENDOR TO CONTACT STAFF: Vendor is to contact (Palomar Staff Name) at (760) 744-1150, EXT. __, to schedule / coordinate the work.</li> <li>= STAFF TO CONTACT VENDOR: (Palomar Staff Name) at (760) 744-1150, EXT. __, will contact Vendor to schedule / coordinate work.</li> </ul> <p>DEADLINE FOR COMPLETION: SERVICES TO BE PERFORMED: ON-SITE or at VENDOR FACILITY.</p>

<p><b>Standard Comment Type</b> <b>Standard Comment ID</b></p> <p><b>When to Use this Comment</b></p>	<p><b>FULL COMMENT</b></p> <p><i>(complete and/or delete items within the Comment as applicable)</i></p>
<p><b>REQ FAC</b></p> <p><b>The District Facilities Department should use this Comment for SERVICES TO BE PERFORMED.</b></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><b>JOB COORDINATION (Select one):</b></p> <p>= <b>VENDOR TO CONTACT STAFF:</b> Vendor is to contact (Palomar Staff Name) at (760) 744-1150, EXT. __, to schedule / coordinate the work.</p> <p>= <b>STAFF TO CONTACT VENDOR:</b> (Palomar Staff Name) at (760) 744-1150, EXT. __, will contact Vendor to schedule / coordinate work.</p> <p><b>=== 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.</b></p> <p><b>DEADLINE FOR COMPLETION:</b> <b>WORK / SERVICE LOCATION:</b> <b>DISTRICT / INTERNAL WORK ORDER: WR</b></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** Help

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Business Unit PALMR      Requisition Date 10/29/2014  
Requisition ID NEXT      Status Open

---

\*Sort Method       \*Sort Sequence      

---

**Comments** Find | View All    First 1 of 1 Last

Use Standard Comments      Comment Status Active       

FOR FISCAL YEAR: FY: \_\_

REQUESTOR (Requesting Dept.) INFO:

Requestor Name / Phone:

End User Name / Phone:

Accountable Dept





Send to Supplier       Show at Receipt

Show at Voucher

**Associated Document**

Attachment	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email
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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.

Header ?	
*Requester	KDAVIS  Kathleen D. Davis
*Requisition Date	10/29/2014  <a href="#">Requester Info</a>
Origin	IS  Information Systems
*Currency Code	USD Dollar
Accounting Date	10/29/2014 
<a href="#">Requisition Defaults</a>	<a href="#">Edit Comments</a>
<a href="#">Requisition Activities</a>	

5. Click into the Description box to enter an item description.

The screenshot shows a requisition form with the following fields and values:

- \*Requester: [Empty]
- \*Requisition Date: 09/20/2019
- Origin: ONL
- \*Currency Code: USD
- Accounting Date: 09/20/2019

Buttons: Requisition Defaults, Requisition Activities, Add Comments, Amount Summary (0.00 USD).

Section: Add Items From (Purchasing Kit, Catalog, Item Search, Requester Items)

Line	Item	Description	Quantity	*UOM	Category	Price	Merch Amou
1	[Empty]	[Empty]	0.0000	[Empty]	[Empty]	0	[Empty]

Buttons: Save, Notify, Refresh

6. Enter the Quantity, Unit of Measure (UOM), Category\*, and Unit Price.

**\*Category** is the account number.

If multiple lines are required, click Save, then 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.

palomar.edu needs some information

Script Prompt:  
Enter number of rows to add:

1

OK  
Cancel

7. 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.



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

Maintain Requisitions

### Schedule

Business Unit PALMR Requisition Date 11/20/2014  
 Requisition ID NEXT Status Open

[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	test	1.0000 EACH	10.000000	10.00 USD		Kathleen D. Da	Active

Add Ship To Comments

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

The distribution information defaulted in from the Requisition Defaults. Make any necessary changes. On the far 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.

Distribution Details [Hel](#)

Maintain Requisitions

### Distribution

Requisition ID NEXT Item test  
 Line 1 Status Active  
 Schedule 1  
 Ship To CENTRAL CENTRAL Quantity 1.0000 EA  
 \*Distribute By  Open Quantity 1.0000  
 \*Liquidate By  Merchandise Amt 10.00 USD  
 SpeedChart  Multi-SpeedCharts

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	100.0000	1.0000	10.00	PALM	441100	11	561100	67800	10	0000000

[OK](#) [Cancel](#) [Refresh](#)

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.

Distribution Details Hel

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Maintain Requisitions

Distribution

Requisition ID NEXT  
Line 1  
Schedule 1

Ship To CENTRAL CENTRAL

\*Distribute By **Quantity**

\*Liquidate By Amount

SpeedChart  Multi-SpeedCharts

Item Status Active

Quantity 1.0000 EA  
Open Quantity 1.0000  
Merchandise Amt 10.00 USD

Distributions												
Chartfields	Details	Asset Information	Budget Information		GL Unit	Account	Fund	Dept	Program	Class	Project	
1	Open	100.0000	Quantity	10.00	Merchandise Amount	PALMI	441100	11	561100	67800	10	0000000

OK Cancel Refresh

- 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  
Line 1  
Schedule 1

Ship To CENTRAL CENTRAL

\*Distribute By **Quantity**

\*Liquidate By Amount

SpeedChart  Multi-SpeedCharts

Item Status Active

Quantity 1.0000 EA  
Open Quantity 1.0000  
Merchandise Amt 10.00 USD

Distributions											
Chartfields	Details	Asset Information	Budget Information		GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	50.0000	Quantity	0.5000	Merchandise Amount	PALMI	441100	11	561100		
2	Open	50.0000	Quantity	0.5000	Merchandise Amount	PALMI	441000	11	561100		

OK Cancel Refresh

- 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.

Distribution Details

Maintain Requisitions

Distribution

Requisition ID NEXT  
Line 1  
Schedule 1

Ship To CENTRAL CENTRAL

\*Distribute By Amount

\*Liquidate By Amount

SpeedChart  Multi-SpeedCharts


Item Status Active  
Quantity  
Open Amount  
Merchandise Amt

Distributions Person

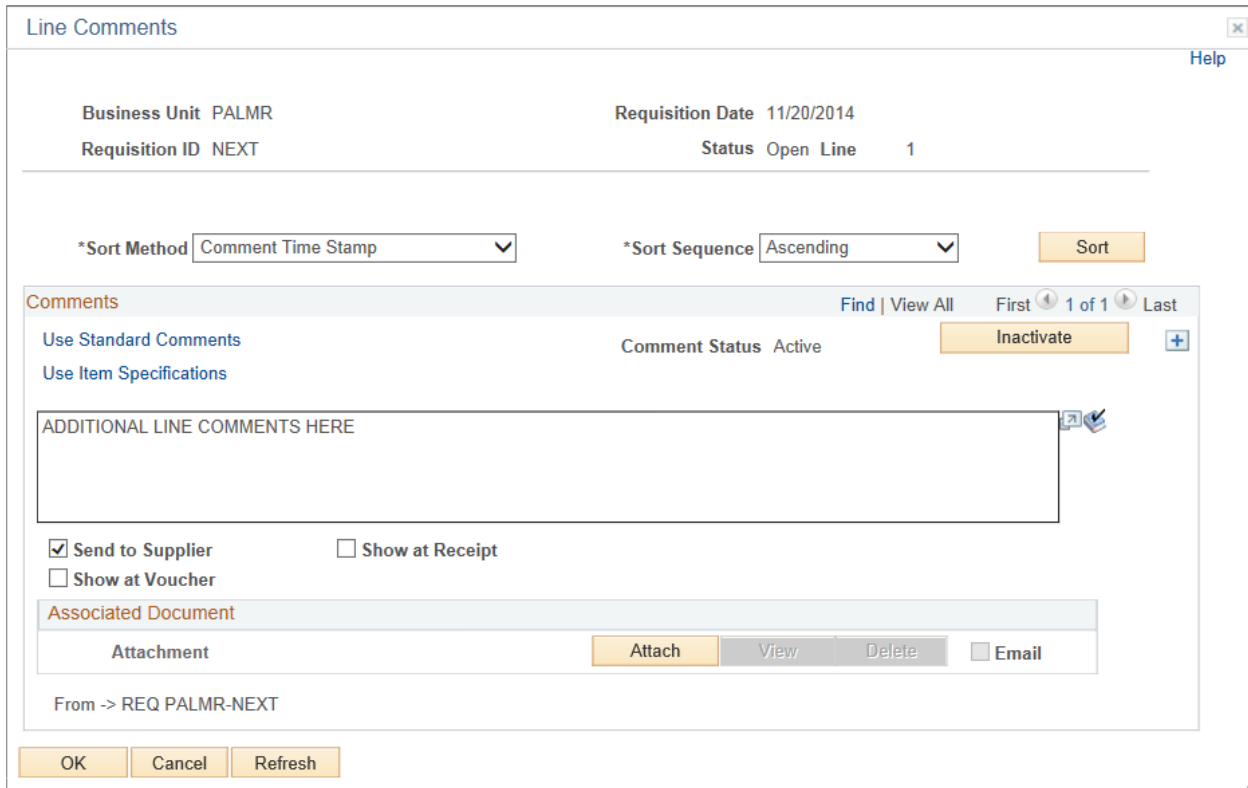
Chartfields	Details	Asset Information	Budget Information				
Distrib	Status	Percent	Merchandise Amount	GL Unit	Account	Fund	Dept
1	Open	80.0000	8.00	PALMI	441100	11	561100
2	Open	20.0000	2.00	PALMI	515300	11	561100

OK Cancel Refresh

## 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 11/20/2014  
Requisition ID NEXT Status Open Line 1

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

Comments Find | View All First 1 of 1 Last  
Use Standard Comments Comment Status Active Inactivate  
Use Item Specifications

ADDITIONAL LINE COMMENTS HERE

Send to Supplier  Show at Receipt  
 Show at Voucher

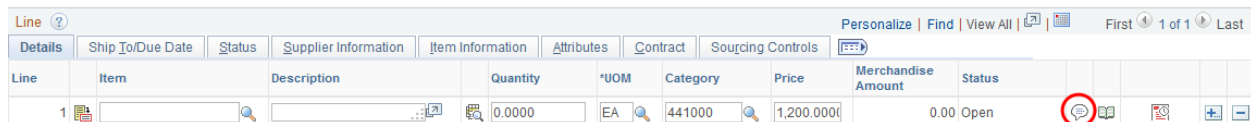
Associated Document  
Attachment Attach View Delete Email

From -> REQ PALMR-NEXT

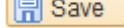
OK Cancel Refresh

Click the 'OK' button.

The callout bubble now has lines in it  indicating that the line contains comments.



Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000	EA	441000	1,200.0000	0.00	Open

9. When all information has been entered on the requisition, click  and note the Req number (Requisition ID) that has been assigned to the Requisition.

Maintain Requisitions

Requisition

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

Header

\*Requester  Kathleen D. Davis  
 \*Requisition Date  Requester Info  
 Origin  Information Systems  
 \*Currency Code  Dollar  
 Accounting Date






Requisition Defaults Add Comments Amount Summary  
 Requisition Activities

Add Items From

Purchasing Kit Catalog  
 Item Search Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		test	1.0000	EA	441100	10.00000	10.00	Open

View Printable Version View Approvals \*Go to More...

**Recommended:** When entering multiple rows of information into the requisition, it is recommended that the Requester **save frequently**. Frequent saving minimizes the chances that data will be lost from system slowdowns, loss of power, or interruptions during data entry. All information for a particular line, however, must be completed before a Save can occur.

**Recommended:** Before Budget Checking it would be advisable to use the View Printable Version link to view the requisition to make sure that everything is correct on the req. Once the req. is forwarded for approval no changes can be made.

Line		Details	Ship To/Due Date	Status
Line	Item			
1				
2				

[View Printable Version](#)

10. **OPTIONAL:** Budget Pre-Check the Req.



You can do a budget pre-check to make sure you have enough money in the account to cover the requisition before doing a Budget Check. Click on the link next to the Budget Check button. This may be helpful if you are waiting for a budget transfer to be completed before officially budget checking the req. This would eliminate the need to go to Budget Overview before completing the req.


Requisition


Business Unit PALMR  
Requisition ID NEXT  
Requisition Name  Copy From

Status Open  
Budget Status Not Chk'd

Hold From Further Processing

Budget Check  Budget Pre-Check 

Header 

11. 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

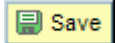
Business Unit PALMR  
Requisition ID 000008218 Track Batch 1  
Requisition Name  000008218

Status Open  
Budget Status Valid

Hold From Further Processing

12. 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!**

13. Click  one last time.


14. **OPTIONAL:** If you want to verify the routing for the requisition click on View Approvals

Maintain Requisitions  
Requisition

Business Unit PALMR  
Requisition ID NEXT  
Requisition Name  Copy From


Status Open  
Budget Status Not Chk'd


Hold From Further Processing



Header 




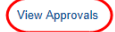

\*Requester  KDAVIS Kathleen D. Davis  
\*Requisition Date  11/20/2014 Requisition Info  
Origin  IS Information Systems  
\*Currency Code  USD Dollar  
Accounting Date  11/20/2014





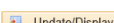
Requisition Defaults Add Comments  
Requisition Activities

Amount Summary   
Total Amount 10.00 USD

Add Items From   
Purchasing Kit Catalog  
Item Search Requester Items

Line   
Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls   
Line Item Description Quantity \*UOM Category Price Merchandise Amount Status  
1  test 1.0000 EA 441100 10.00000 10.00 Open

View Printable Version     \*Go to  More... 

This screen shows you the routing for this requisition.

View Approvals Help

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Business Unit	PALMR	Number of Lines	1
Requisition ID	0000008362	Total Amount	50.00 USD
Requisition Name	Training req		
Requested For	Kathleen D. Davis		
Status	Open		
Budget Status	Not Checked		

---

### 1st Approval

Training req:Initiated Start New Path

1st Approval

Not Routed

+ → Don Sullins  
1st Approval → +

### Final Approval

Training req:Initiated Start New Path

Final Approval

Not Routed

+ → Ronnie Ballesteros-Perez  
Final Approval → +

Apply Approval Changes

Return

Once your requisition has been approved by all approvers, it shows up in a queue for Purchasing. From there, your requisition is assigned to a Buyer and processed into a Purchase Order. Once your Purchase Order is complete and signed, it will be sent to the vendor and you will be copied on that email.