

PeopleSoft Requisition Creation

Purchasing > Requisitions > Add/Update Requisitions

PeopleSoft Finance version 8 vs. version 9

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PeopleSoft Finance v8 vs. v9

When you first log into PeopleSoft Finance v9, this is what you will see. This page explains some of the features of the new version.

The screenshot shows the PeopleSoft Finance v9 home page. At the top, there is a navigation bar with 'Favorites' and 'Main Menu' links circled in red. Below this, a 'Top Menu Features Description' section contains the following text:

Our menu has changed!

The menu is now located across the top of the page. Click on **Main Menu** to get started.

Highlights

- Recently Used** pages now appear under the Favorites menu, located at the top left.
- Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.
- Menu Search**, located under the Main Menu, now supports type ahead which makes finding pages much faster.

Three small screenshots illustrate these features: the first shows the 'Favorites' menu with 'Recently Used' pages; the second shows a breadcrumb trail; the third shows the 'Menu Search' feature with a type-ahead search box.

To remove this page: click on Pagelet Settings and Remove.

The screenshot shows the 'Removal Confirmation' dialog box. At the top, the 'Top Menu Features Description' pagelet is highlighted with a green border. Below it, a 'Pagelet Settings' button is visible. The dialog box contains the following text:

Removal Confirmation

? Are you sure you wish to remove this pagelet from your home page?
You can add it later by going to the 'Personalize Home Page Content' page.

At the bottom, there are two buttons: 'Yes - Remove' and 'No - Do Not Remove'.

Below the dialog box, the navigation bar shows 'Personalize Content | Layout' and a 'Help' link.

How to put the Main Menu back on the page:

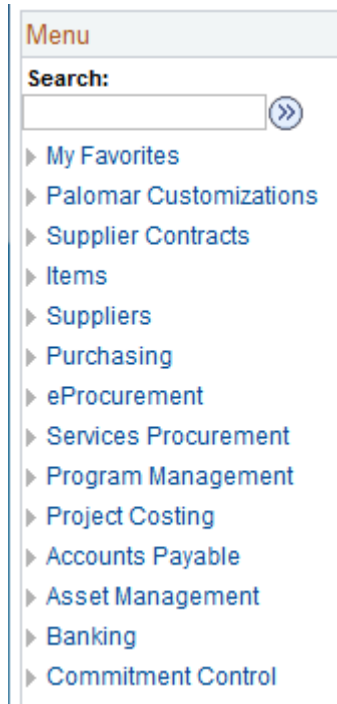
Click the Content link



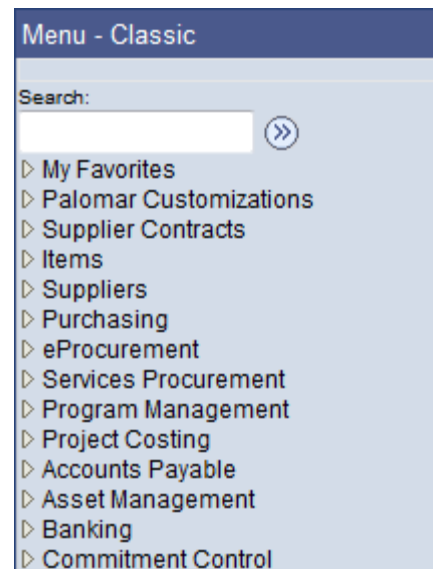
Choose Menu or Menu – Classic and Save. The Classic Menu looks like the old version

The screenshot shows the 'Personalize Content: Main Menu' configuration page. At the top, there's a 'Tab Name' field with 'Main Menu' and a 'Welcome Message' field. Below this, there's a section for 'Choose Pagelets' with instructions: 'Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.' Under 'Arrange Pagelets', there's a 'Go to' link for 'Personalize Layout'. The page is divided into three columns of pagelets: 'PeopleSoft Applications' (with 'Menu' checked), 'Cross-Financials' (with 'Operational Threshold Alert'), and 'Project Costing' (with 'Top Projects' and 'Project Transactions Pivot'). At the bottom, there's a 'Save' button circled in red, and a 'Return to Home' link. A 'Notify' button is also visible.

MENU:



CLASSIC MENU:



Entering a New Requisition

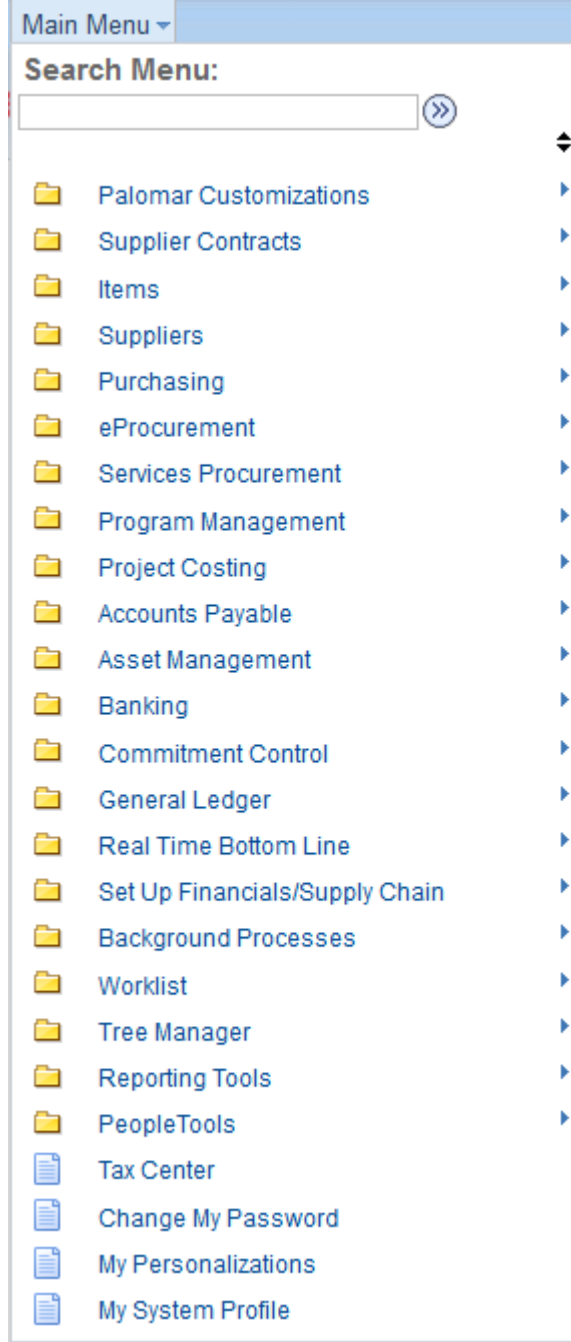
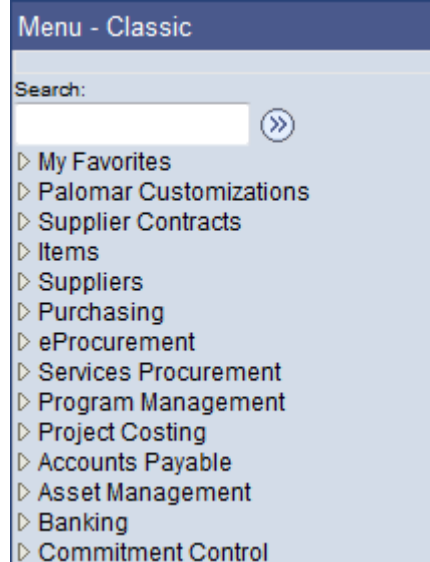
Purchasing > Requisitions > Add/Update Requisitions

NEW VERSION

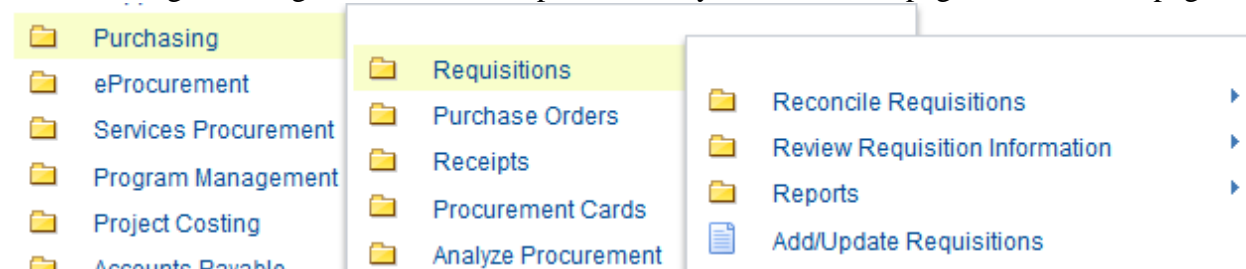
Favorites ▾ Main Menu ▾ > Purchasing ▾ > Requisitions ▾ > Add/Update Requisitions

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.



The advantage to using the Main Menu option is that you will see the pagelets across the page.



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."

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'd
☐ 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

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

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
 Requisition ID NEXT
 Requisition Name Copy From ☐ Hold From Further Processing

Status Open
 Budget Status Not Chk'd

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
 Requisition Activities

Amount Summary ?
 Total Amount 0.00 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	Personalize	Find	View All	First	1 of 1	Last
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status					
1			0.0000			0	0.00	Open					

View Printable Version View Approvals *Go to

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 ID NEXT
 Requisition Date 10/27/2014
 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

Unit of Measure
 Supplier Location
 Supplier
 Category Supplier Lookup

Schedule

Ship To CENTRAL CENTRAL RECEIVING
 *Distribute By Quantity
 *Liquidate By Amount

Due Date

Ultimate Use Code
 Attention To One Time Address

Distribution

SpeedChart

Distributions

Details	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

Old version: Vendor

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

Supplier

- If you don't know what Supplier to use or you expect Purchasing to select the supplier for you, enter **BEST VENDR** as the Supplier ID.
- If you know the Supplier Name, but not the ID number, use the Supplier Lookup link to search for the Supplier ID.
- If you want a certain supplier who is not found in Supplier Lookup, enter NEW VENDR as the Supplier ID. You will also need to list the Supplier 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 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.

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
 Requisition ID NEXT
 Requisition Name Copy From ☐ Hold From Further Processing

Status Open
 Budget Status Not Chk'd

▼ 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
 Requisition Activities

Amount Summary ?
 Total Amount 0.00 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	Personalize	Find	View All	First	1 of 1	Last
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

Business Unit PALMR Requisition Date 11/19/2014
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 +

☒ Send to Supplier ☐ Show at Receipt
☐ Show at Voucher ☐ Approval Justification

Associated Document
Attachment Attach View Delete Email

From -> REQ PALMR-NEXT

OK Cancel Refresh

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

Standard Comments

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. Un-check the **Send to Vendor** checkbox.

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

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

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>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): = 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). 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): = 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. DEADLINE FOR COMPLETION: SERVICES TO BE PERFORMED: ON-SITE or at VENDOR FACILITY.</p>

Standard Comment Type Standard Comment ID	FULL COMMENT
When to Use this Comment	(complete and/or delete items within the Comment as applicable)
REQ FAC The District Facilities Department should use this Comment for SERVICES TO BE PERFORMED. Indicate who will be responsible for scheduling / coordinating the services (staff or vendor?) Indicate any absolute, critical deadline date for the services. State location of the services.	= Complete and/or delete items below as applicable: JOB COORDINATION (Select one): = 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. = = = 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. DEADLINE FOR COMPLETION: WORK / SERVICE LOCATION: DISTRICT / INTERNAL WORK ORDER: WR

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

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

5. **Approval Justification:** You may also add an additional Header comment to include information that will be provided to the approver when you send the requisition forward. To do this click the  to add a Comment. Click on the Approval Justification box and add a comment in the comment box. This information will be provided to the approver.

Header Comments Help

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

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt
☐ Show at Voucher ☒ Approval Justification

Associated Document





Attachment Attach View Delete ☐ Email

From -> REQ PALMR-NEXT


OK Cancel Refresh

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  Requester Info
 Origin IS  Information Systems
 *Currency Code USD Dollar
 Accounting Date 10/29/2014 

[Requisition Defaults](#) [Edit Comments](#)
[Requisition Activities](#)

6. 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.

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
Requisition Activities

Amount Summary
Total Amount 0.00 USD

Add Items From
Purchasing Kit Catalog
Item Search Requisition Items

Line

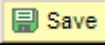

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
6			0.0000			0	0.00	Open

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

Save Notify Refresh Add Update/Display

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

***Category** is the account number.

If multiple lines are required, click , 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:

OK Cancel

8. 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	Merchandise Amt
1	test	1.0000 EACH	10.00 USD

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

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

[Details](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CENTR	1.0000	10.00000	10.00		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

Line 1

Schedule 1

Ship To CENTRAL CENTRAL

*Distribute By [Quantity](#)

*Liquidate By [Amount](#)

SpeedChart [Multi-SpeedCharts](#)

Item

Status Active

test

Quantity 1.0000 EA

Open Quantity 1.0000

Merchandise Amt 10.00 USD

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

[Chartfields](#) | [Details](#) | [Asset Information](#) | [Budget Information](#)

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:

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

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

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 test

Quantity 1.0000 EA

Open Quantity 1.0000

Merchandise Amt 10.00 USD

Distributions Personalize | Find | View All | First 1 of 1 | Last

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project
1	Open	100.0000	1.0000	10.00	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 Per

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Fund	Dept
1	Open	50.0000	0.5000	5.00	PALMI	441100	11	561100
2	Open	50.0000	0.5000	5.00	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	Item	
Line	1	Status	Active
Schedule	1		
Ship To	CENTRAL	CENTRAL	Quantity
*Distribute By	Amount		Open Amount
*Liquidate By	Amount		Merchandise Amt
SpeedChart		Multi-SpeedCharts	

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

OKCancelRefresh

9. 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 Help


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 ?										Personalize Find View All  				First 1 of 1 Last		
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						0.0000	EA 	441000 	1,200.000	0.00	Open					

10. 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
 Requisition ID NEXT
 Requisition Name [Copy From](#)

Status Open
 Budget Status Not Chk'd 


☐ Hold From Further Processing

Header 


*Requester Kathleen D. Davis
 *Requisition Date 11/20/2014 [Requester Info](#)
 Origin Information Systems
 *Currency Code Dollar
 Accounting Date 11/20/2014


[Requisition Defaults](#) [Add Comments](#) [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](#) [Personalize](#) [Find](#) [View All](#)  First 1 of 1 Last


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...](#)



 [Save](#)  [Notify](#)  [Refresh](#)  [Add](#)  [Update/Display](#)

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](#)

11. **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

[Budget Check](#) [Budget Pre-Check](#)

☐ Hold From Further Processing

▼ Header ?

12. 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

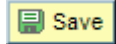
Business Unit PALMR
 Requisition ID 000008218 Track Batch 1
 Requisition Name 000008218

Status Open
 Budget Status Valid

[Budget Check](#) [Budget Pre-Check](#)

☐ Hold From Further Processing

13. 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!**

14. Click  one last time.

15. **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

[Budget Check](#) [Budget Pre-Check](#)

☐ 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](#)

[Add Items From](#)

Purchasing Kit Catalog
 Item Search Requirer 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

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

This screen shows you the routing for this requisition.

View Approvals
Help

Business Unit PALMR
Requisition ID 0000008362
Requisition Name Training req
Requested For Kathleen D. Davis
Status Open
Budget Status Not Checked

Number of Lines 1
Total Amount 50.00 USD

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

16. 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. By clicking OK, it 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 11/20/2014
 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 Distribs' to apply changes to all distribution lines on the requisition.

☒ Mark All ☐ Unmark All

Retrofit Field Selection				
Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Supplier	0000001278	
<input type="checkbox"/>		Category	441000	
<input type="checkbox"/>		Unit of Measure	EA	
<input type="checkbox"/>		Supplier Location	0000000001	
<input type="checkbox"/>		Ship To	CENTRAL	
<input type="checkbox"/>		Due Date	2014-11-20	
<input type="checkbox"/>	1	Pct	100	

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.