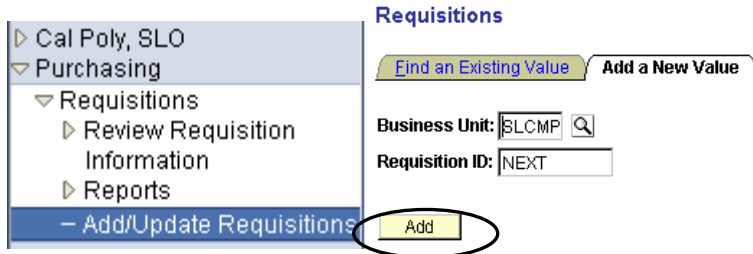


9.0 Enter a purchase requisition

Navigation:

Purchasing, Requisitions, Add/Update Requisitions, Add



1.) On the Maintain Requisition page click [Requisition Defaults](#)

Note to users who change the default requester: Click the on the Requester field to select from the list, or type in the user Id. The following message indicates the values that will default based on the requester change.

Changing Requester will change the default settings
 ShipTo ID to 070_108
 Location Code to 070_100
 General Ledger Unit to SLCMP
 Department to 127900
 . Retrofit to existing lines? (10150,147)

Changing Requester will change the default setting like ShipTo ID, Location, Department ID, Account and other Chartfields. Click 'Yes' to retrofit/apply the default values from Requester to the existing lines? Click 'No' to change only the default setting. Click 'Cancel' to reset the Requestor to the previous value.

Maintain Requisitions

Requisition

Business Unit: SLCMP Status: Open
 Requisition ID: NEXT Budget Status: Not Chkd
 Hold From Further Processing

Header

*Requester: BTESCH Brenda Tesch [Requisition Defaults](#)
 *Requisition Date: 07/11/2008 [Requester Info](#) [Add Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar
 Accounting Date: 07/11/2008

Amount Summary

Total Amount: 0.00 USD

Add Items From

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

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

View Printable Version *Go to:

- 2.) Leave **Buyer:** blank. The buyer will be automatically assigned based on the category code.
- 3.) Enter your Vendor ID in the Vendor field, or click [Vendor Lookup](#) to search.

Maintain Requisitions

Requisition Defaults

Business Unit: SLCMP **Requisition Date:** 08/21/2008
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.

Line

Buyer: **Unit of Measure:**
Vendor: **Vendor Location:**
Category: [Vendor Lookup](#)

Schedule

- 4.) Type in the first few letters of the Vendor Name in the Name field and click
- 5.) To select your vendor, click the appropriate check box and click Ok.

Vendor Search

Search Criteria

Name: ShortName:

City: State:

Country: Postal:

Class: Type:

Max Rows:

1 to 10 of 47

Search Results [View All](#)

Sel	Vendor ID	Location	Address Sequence Number	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>	0000000097	MAIN	1	SAN LUIS-026	SAN LUIS OBISPO,CITY OF	N
<input type="checkbox"/>	0000000213	MAIN	1	SAN LUIS-001	SAN LUIS AUTO PARTS	N
<input type="checkbox"/>	0000000214	MAIN	1	SAN LUIS-006	SAN LUIS GLASS & WINDOW CO	N
<input type="checkbox"/>	0000000215	MAIN	1	SAN LUIS-052	SAN LUIS MAILING	Y
<input checked="" type="checkbox"/>	0000000217	MAIN	1	SAN LUIS-030	SAN LUIS PAINT	N

[Vendor Detail](#) [Address](#)

6.) If you do not locate your vendor, click and enter 0000000001 in the Vendor field on the Header Defaults page. Do not leave this field blank. Note: You could also look up the Vendor Code by opening a second window and go to **Vendor Look-up**

7.) Select a Category by using the magnifying glass to search for the appropriate Category, or type in the Category value.

- When using the Category Search, click the [Description](#) column header to alphabetize the list of categories.
- Click [View All](#) to see the entire list. Select the appropriate value.

Look Up Category

SetID: SLCMP
 Category: begins with
 Description: begins with
 Look Up Clear Cancel [Basic Lookup](#)

Search Results

[View All](#) First 1-100 of 280 Last

Category	Description
00500	ABRASIVES
02000	AG EQUIP
01900	AG GRAINS
02200	AG PARTS
02500	AIR COMPRESSORS ACC
03500	AIRCRAFT EQUIP, MISC

The Category Id will automatically select the corresponding Account Code on the Distribution line. For example 66003 (General Supplies & Services) corresponds with category Id 61500 (Office Supplies). If your Requisition has multiple lines with various Categories, you can leave the field blank here and select it on each line, if you prefer.

8.) Select a Unit of Measurement Unit of Measure: by using the magnify glass.

9.) Populate Due Date: by clicking on the calendar icon to select a date. The date should be when you want the product delivered to campus. Do not leave this field blank.

NOTES:

-Do not change the Distribute by: field on this page. Enter split distribution on the distribution lines of the requisition.

10.) Populate the Fund number and if necessary, Program, Class and Project. As stated earlier, leave the Account field blank. 11.) Click

Distributions									
Customize Find View All First 1 of 1 Last									
Dist	Fund	Account	Dept	Program	Class	Project	Budget Date	Location	
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	07/11/2008	0010012800	<input type="button" value="OK"/>

*The Chartfields entered here will default on each line of the

Requisition. They can be overridden if necessary.

Note:

If you return to this page ([Requisition Defaults](#)) to make a change, you will be asked if you want the change to appear throughout the Requisition. Click

[Mark All](#) and

Business Unit: SLCMP **Requisition Date:** 08/04/2008
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 type="checkbox"/>		Vendor	0000000127	
<input type="checkbox"/>		Category	49500	
<input type="checkbox"/>		Unit of Measure	BOX	
<input type="checkbox"/>		Vendor Location	MAIN	

11.) On the Maintain Requisition page enter product, item code first followed by the description. If can click the line details icon

 **to view the full description field.**

12.) Enter the Qty

13.) Enter the Price

Header

*Requester: BTESCH Brenda Tesch [Requisition Defaults](#)
 *Requisition Date: 07/11/2008 [Requester Info](#) [Add Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar
 Accounting Date: 07/11/2008

Amount Summary
 Total Amount: 195.00 USD

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

Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	R390 - BUCKET OF RED	3.0000	EA	00600	65.00000	195.00	Open

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

14.) Click for the UOM and Category ID to default on Line 1 if you have entered them on the Requisition Defaults page, otherwise enter them on the line.

15.) For additional lines on the Req click and enter the number of lines you need to add. Follow steps 12-15.

16.) For each line of the requisition there is a schedule . The schedule is where you can review the chart field strings. If there are multiple lines on the requisition, click [View All](#) to see all schedules on one page.

17.) To verify the chartfield for each schedule

Click the distribution icon which is located to the right of the due date.

[Return to Main Page](#)

Line	Item:	Quantity:	Amount:
1	R390 - BUCKET OF RED PAINT	3.0000 Each	195.00 USD

Schedule

Sched	*Ship To	Quantity	Price	Amount	Due Date	Status
1	070001	3.0000	65.00000	195.00	08/26/2008	Active

18.) Verify or change Chartfield here if appropriate and click . Once you select OK, you will go back to the Schedule

Page.

19.) Then select [Return to Main Page](#)

20.) Click [Add Comments](#) to enter comments to the Buyer. Comments may include Vendor contact information, comments regarding back-up or rush orders.

If you use the Print Requisition feature, check Send to Vendor, so the comments will display on the printed copy. The comments will not be sent to the vendor. Spell check you comments by clicking



Header Comments

Business Unit: SLCMP **Requisition Date:** 07/11/2008
Requisition ID: NEXT **Status:** Open

*Sort Method: *Sort Sequence:

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#)

Comment Status: Active

BACK UP IN CAMPUS MAIL
PLEASE EXPEDITE



Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Email

From -> REQ SLCMP-NEXT

21.) Click and

Header

*Requester: BTESCH Brenda Tesch [Requisition Defaults](#)
 *Requisition Date: 07/11/2008 [Requester Info](#) [Add Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar
 Accounting Date: 07/11/2008

Amount Summary
 Total Amount: 195.00 USD

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

Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	R390 - BUCKET OF RED	3.0000	EA	00600	65.00000	195.00	Open

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

Save **Notify** **Refresh** **Add** **Update/Display**

22.) Once a requisition number is assigned

Maintain Requisitions

Requisition

Business Unit: SLCMP Status: Open
 Requisition ID: 2007100968 [Copy From](#) Budget Status: Not Chk'd
 Hold From Further Processing

Header

23.) If you are the approver, approve by clicking otherwise, put the requisition on hold by selecting the Hold from Further Processing and notify your approver of the requisition ID.

Otherwise after approving, run Budget Check by clicking

Maintain Requisitions

Requisition

Business Unit: SLCMP Status: Open
 Requisition ID: 2007100968 [Copy From](#) Budget Status: Not Chk'd
 Hold From Further Processing

Header

24.) Click

25.) Verify status and budget status before leaving the page

Status:

Approved



Budget Status:

Valid

NOTE: Budget Check process will be run nightly. If the requisition is in Approved status it will be Budget Checked, unless the Hold from Further Processing box has been selected.

Please make sure to send your backup (quotes, pricing, sole source justification and any other information to the Contracts, Procurement, and Risk Management office in order for your requisition to be processed into a purchase order.