



# Add/Update Requisitions

This guide outlines the process to enter a requisition. A Requisition is a request for goods or services for use by your department. Taxes are not included in the requisition process therefore all goods will be assessed at the current county tax rate on the purchase order. The requestor's supervisor or department head usually approves requisitions before they are forwarded to the Purchasing department. The Purchasing department uses requisitions to create purchase orders, vendor contracts, or requests for quote.

Purchasing > Requisition > Add/Update Requisitions

## Requisitions

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit:

Requisition ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

1. Enter the Business Unit; STCMP
2. Click the Add button

## Maintain Requisitions

### Requisition

Business Unit: STCMP

Requisition ID: NEXT

[Copy From](#)

Status: Open

Budget Status: Not Chk'd

Hold From Further Processing

#### Header

\*Requester:

\*Requisition Date: 04/20/2011 [Requester Info](#)

Origin: ONL Online Entry

\*Currency Code: USD Dollar

Accounting Date: 04/20/2011

[Requisition Defaults](#)

[Add Comments](#)

[Requisition Activities](#)

#### Amount Summary

Total Amount: 0.00 USD

#### Add Items From

[Purchasing Kit](#)

[Catalog](#)

[Item Search](#)

[Requester Items](#)

[View Printable Version](#)

\*Go to:

3. **Check the Hold From Further Processing box**



**Maintain Requisitions**

**Requisition**

Business Unit: STCMP      Status: Open  
 Requisition ID: NEXT      Budget Status: Not Chkd  
[Copy From](#)       Hold From Further Processing

**Header**

\*Requester: 90000000338      Requestor      [Requisition Defaults](#)  
 \*Requisition: 04/20/2011      [Requester Info](#)      [Add Comments](#)  
 Date:      [Requisition Activities](#)  
 Origin: ONL      Online Entry  
 \*Currency Code: USD      Dollar  
 Accounting: 04/20/2011      **Amount Summary**  
 Date:      Total Amount: 0.00 USD

**Add Items From**

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

4. Select Requisition Defaults link

**Maintain Requisitions**

**Requisition Defaults**

Business Unit: STCMP      Requisition Date: 05/26/2009  
 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.

**Line**

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

**Schedule**

Ship To:      \*Distribute by: Quantity  
 Due Date:      \*Liquidate by: Quantity  
 Ultimate Use Code:      [Vendor Lookup](#)

**Distribution**

SpeedChart:      [Vendor Lookup](#)

**Distributions**      Customize | Find | View All | First | 1 of 1 | Last

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Location	Business Unit
1		STCMP						


OK      Cancel      Refresh

**NOTE: All items entered on this page will be the default for the whole requisition.**

5. Select the Override button

**NOTE: Default will be used for the following reasons:**

- If purchasing a good and service on the same order
- If splitting funding sources

6. Click the  next to the Vendor field



### Look Up Vendor

SetID: STCMP

Vendor ID:

Short Vendor Name:

[Basic Lookup](#)

### Search Results

View All First 1-2 of 2 Last

Vendor ID	Short Vendor Name	Vendor Name 1	Vendor Name 2	Our Customer Number	Old Vendor ID
0000000553	DELLCOM-001	Dell Marketing LP	(blank)	(blank)	DELLCOM
0000006517	DELLFAM-001	Dellosso Family Farm	(blank)	9245	(blank)

**\*A Form 204 must be attached in the comments section if the vendor is not listed in the database.**

- Type the first four letters of the vendor's name in the Short Vendor Name field
- Click the Look Up button
- Select the Vendor from the Search Results

**Note: If the vendor is not listed, enter To Be Determined as the vendor choice. TBD is the Short Vendor Name. If a particular vendor is to be used put a comment in the Header Comments section.**

### Requisition Defaults

Business Unit: STCMP      Requisition Date: 04/20/2011  
 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: 0000000553      Dell Marketing LP      Vendor Location: 001  
 Category:       [Vendor Lookup](#)

#### Schedule

Ship To:       \*Distribute by: Quantity  
 Due Date:       \*Liquidate by: Quantity  
 Ultimate Use Code:

#### Distribution

SpeedChart:

#### Distributions

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

Fund	Dept	Program	Location
G0106	41500		STANMSR270

- Enter the Due Date; this date is the date the items are wanted in the department
- Enter the Fund, Dept, Program, and Project of the Chartfield string to be charged for this expenditure.

**NOTE: Due Dates must be 2-3 Business weeks out.**

**NOTE: A default chartfield string will be populated based on what the chartfield string given when requesting access.**



Distributions

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

Fund	Dept	Program	Location
G0106	41500		STANMSR270

12. Enter the location code for where the items are to be delivered.

**NOTE: A default location will be populated based on the Requester's physical location.**

13. Click the OK button

Maintain Requisitions

Requisition

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

[Copy From](#)

**Header**

\*Requester: 90000000338      Requester      [Requisition Defaults](#)  
 \*Requisition Date: 04/20/2011      [Requester Info](#)      [Add Comments](#)  
 Origin: ONL      Online Entry      [Requisition Activities](#)  
 \*Currency Code: USD      Dollar

Accounting Date: 04/20/2011

**Amount Summary**

Total Amount: 0.00 USD

**Add Items From**

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

**NOTE: Header Comments is used to enter comments that are pertinent to the order, either for the Vendor, for Procurement, Shipping & Receiving, or Accounts Payable.**

14. Click on the Add Comments link



**Header Comments**

Business Unit: STCMP      Requisition Date: 05/26/2009  
Requisition ID: NEXT      Status: Open

\*Sort Method:       \*Sort Sequence:

**Comments**      Find | View All      First 1 of 1 Last  
[Copy Standard Comments](#)      Comment Status: Active     

Send to Vendor     Shown at Receipt     Shown 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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From -> REQ STCMP-NEXT

15. Type the comments

- Add contact name and extension for person who can answer questions on this requisition
- If "To Be Determined" was selected attach the 204 Vendor Data Record

**NOTE: Select who the comments are for**

- Send to Vendor; if the comment need to be viewed by the vendor
- Shown at Receipt; if the comment needs to be viewed by receiving
- Shown at Voucher; if the comment needs to be viewed by Accounts Payable
- Do not select anything if this is a comment for internal use only

**Header Comments**

Business Unit: STCMP      Requisition Date: 05/26/2009  
Requisition ID: NEXT      Status: Open

\*Sort Method:       \*Sort Sequence:

**Comments**      Find | View All      First 1 of 1 Last  
[Copy Standard Comments](#)      Comment Status: Active     

Send to Vendor     Shown at Receipt     Shown at Voucher

**Associated Document**

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

From -> REQ STCMP-NEXT

16. Select the Attach button, if an attachment is available

**NOTE: Attachments can only be a PDF or a JPEG file.**



Choose File no file selected

Upload Cancel

Attachments should be reviewed after being attached by selecting the View button. This will ensure that the document(s) can be read.

17. Click the Choose File button

18. Choose the file location

NOTE: A window will open to choose the file location from the computer.

19. Click the Upload button

NOTE: Only one document can be attached per comment.

Header Comments

Business Unit: STCMP Requisition Date: 05/26/2009  
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 +

Empty text area for comments

Send to Vendor  Shown at Receipt  Shown at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ STCMP-NEXT

OK Cancel Refresh

20. Click the OK button

NOTE: You can add additional comments by selecting the + icon



Maintain Requisitions

**Requisition**

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

▼ Header

\*Requester: 90000000338      Requirer      [Requisition Defaults](#)  
 \*Requisition Date: 04/20/2011      [Requester Info](#)      [Edit Comments](#)  
 Origin: ONL      Online Entry      [Requisition Activities](#)  
 \*Currency Code: USD      Dollar

Accounting Date: 04/20/2011

**Amount Summary**

Total Amount: 0.00 USD

Add Items From

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

**NOTE: Once a comment has been added, the link will change to Edit Comments**

Maintain Requisitions

**Requisition**

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

▼ Header

\*Requester: 90000000338      Requirer      [Requisition Defaults](#)  
 \*Requisition Date: 04/20/2011      [Requester Info](#)      [Edit Comments](#)  
 Origin: ONL      Online Entry      [Requisition Activities](#)  
 \*Currency Code: USD      Dollar

Accounting Date: 04/20/2011

**Amount Summary**

Total Amount: 0.00 USD

Add Items From

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

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

Save    Notify    Refresh    Add    Update Display

21. Enter the item description -Descriptions must begin with a word that describes what you are purchasing; for example: computer, plants, etc
22. Enter the quantity
23. Enter the UOM; Unit of Measure
24. Enter the Category; use the to find the correct category
25. Enter the price per unit
26. Click the Save button

**The requisition number will appear in the upper left hand corner under the Requisition ID.**

**NOTE: Requisition numbers are system generated; therefore there is no need to keep a log of your numbers unless you choose to do so.**



VERIFICATION OF COMPLETE REQUISITION

Maintain Requisitions

Requisition

Business Unit: STCMP  
Requisition ID: 0000001401

Status: Open  
Budget Status: Not Chk'd  
 Hold From Further Processing

Header

\*Requester: 90000000338  
\*Requisition Date: 04/20/2011  
Origin: ONL  
\*Currency Code: USD  
Accounting Date: 04/20/2011

Requester

Requisition Defaults  
Edit Comments  
Requisition Activities

Amount Summary

Total Amount: 5,000.00 USD

Add Items From

Select Lines To Display

Purchasing Kit  
Item Search

Line: To: Retrieve

Line

Line	Description	Quantity	*UOM	Category	Price	Amount	Status
1	Blanket Order	1.0000	LOT	96200	5,000.00000	5,000.00	Open

27. Click on the Vendor Information tab

Maintain Requisitions

Requisition

Business Unit: STCMP  
Requisition ID: 0000001401

Status: Open  
Budget Status: Not Chk'd  
 Hold From Further Processing

Header

\*Requester: 90000000338  
\*Requisition Date: 04/20/2011  
Origin: ONL  
\*Currency Code: USD  
Accounting Date: 04/20/2011

Requester

Requisition Defaults  
Edit Comments  
Requisition Activities

Amount Summary

Total Amount: 5,000.00 USD

Add Items From

Select Lines To Display

Purchasing Kit  
Item Search

Line: To: Retrieve

Line

Line	Description	Vendor	Vendor Name	Location
1	Blanket Order	0000006517	Dellosso Family Farm	001

28. Verify that the Vendor Name is populated on all line items; if not copy and paste vendor number into empty fields



**Maintain Requisitions**

**Requisition**

Business Unit: STCMP      Status: Open  
 Requisition ID: 0000001401      Budget Status: Not Chk'd  
 Hold From Further Processing

**Header**

\*Requester: 90000000338      Requester  
 \*Requisition Date: 04/20/2011      Requisition Defaults  
 Origin: ONL      Online Entry      Edit Comments  
 \*Currency Code: USD      Dollar      Requisition Activities

Accounting Date: 04/20/2011      Amount Summary  
 Total Amount: 5,000.00 USD

Add Items From      Select Lines To Display  
 Purchasing Kit      Catalog      Line:      To:      Retrieve  
 Item Search      Requester Items

Line	Description	Vendor	Vendor Name	Location
1	Blanket Order	0000006517	Dellosso Family Farm	001

29. Click on the Attributes tab

**Requisition**

Business Unit: STCMP      Status: Open  
 Requisition ID: 0000001401      Budget Status: Not Chk'd  
 Hold From Further Processing

**Header**

\*Requester: 90000000338      Requester  
 \*Requisition Date: 04/20/2011      Requisition Defaults  
 Origin: ONL      Online Entry      Edit Comments  
 \*Currency Code: USD      Dollar      Requisition Activities

Accounting Date: 04/20/2011      Amount Summary  
 Total Amount: 5,000.00 USD

Add Items From      Select Lines To Display  
 Purchasing Kit      Catalog      Line:      To:      Retrieve  
 Item Search      Requester Items

Line	Description	Physical Nature	Where Service Performed	Zero Price Indicator	Amount Only
1	Blanket Order	Services	Ship To	<input type="checkbox"/>	<input type="checkbox"/>

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

Save    Notify    Refresh    Add    Update/Display

30. If this is a service order, select Services from the drop down menu under Physical Nature

31. Check the Amount Only box if the order is to be distributed by amount rather than quantity. For example-Blanket Orders

32. Click the Save button

**NOTE: Notification is used to let the reviewer/approver know this is ready for review.**



NOTIFICATION

Maintain Requisitions

Requisition

Business Unit: STCMP  
Requisition ID: NEXT

Status: Open  
Budget Status: Not Chk'd  
 Hold From Further Processing

Header

\*Requester: [Search]  
\*Requisition Date: 05/26/2009  
Origin: ONL Online  
\*Currency Code: USD Dollar  
Accounting Date: 05/26/2009

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

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

[View Printable Version](#)

\*Go to: ...More...

33. Select the Notify button

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.  
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

[Lookup Recipient](#) [Delivery Options](#)

To: reviewer@csustan.edu

CC:

BCC:

Priority: [Dropdown]

Subject: <Enter Subject here>

Template Text: Workflow Notification  
Priority: %NotificationPriority  
Date Sent: 2010-08-02

Message:

34. Enter the full email address of the recipient in the To: field  
OR  
Click the link for Lookup Recipient

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.  
Click Apply to send this notification and remain on this page.



Send Notification

Lookup Address

**Recipient Search**

Name:

---

**Search Results** Customize | Find | View All | First 1 of 1 Last

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>			Reviewer	reviewer@csustan.edu	90000007475

---

**Recipient List**

To:

CC:

BCC:

35. Enter the first four characters of the individual's last name in Name: field

36. Click the Search button

37. Select the To box to select the individual

38. Click the Add to Recipient List button

39. Click the OK button

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

**Notification Details** Lookup Recipient Delivery Options

To:

CC:

BCC:

Priority:

Subject:

Template Text:

Message:

40. Choose the Priority

41. Type the message to the recipient

*SAMPLE MESSAGE: Dear Reviewer, please review the requisition and forward to the next approving authority.*

42. Click the OK button

**NOTE: Notification is automatic.**

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification. Click Apply to send this notification and remain on this page.



Maintain Requisitions

### Requisition

Business Unit: STCMP      Status: Open  
 Requisition ID: 0000001401      Budget Status: Not Chk'd  
 Hold From Further Processing

[Copy From](#)

**Header**

\*Requester: 90000000338      Requester      [Requisition Defaults](#)  
 \*Requisition Date: 04/20/2011      [Requester Info](#)      [Edit Comments](#)  
 Origin: ONL      Online Entry      [Requisition Activities](#)  
 \*Currency Code: USD      Dollar

Accounting Date: 04/20/2011

**Amount Summary**

Total Amount: 5,000.00 USD

Add Items From      Select Lines To Display

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

Line:  To:  [Retrieve](#)

43. Select the Requisition Activities link

**Activities**

Business Unit: STCMP      Requisition Date: 05/26/2009  
 Requisition ID: NEXT      Status: Open

**Requisition Activities**      Customize | Find      First 1 of 1 Last

Done	*Due Date	*SeqNum	Comments
<input type="checkbox"/>	05/26/2009	1	<input type="text"/>

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

44. Enter comments that the requisition has been sent on and add initials

SAMPLE COMMENT:  
Sent to Reviewer for review. REQ

45. Click the OK button

Maintain Requisitions

### Requisition

Business Unit: STCMP      Status: Open  
 Requisition ID: 0000001401      Budget Status: Not Chk'd  
 Hold From Further Processing

[Copy From](#)

**Header**

\*Requester: 90000000338      Requester      [Requisition Defaults](#)  
 \*Requisition Date: 04/20/2011      [Requester Info](#)      [Edit Comments](#)  
 Origin: ONL      Online Entry      [Requisition Activities](#)  
 \*Currency Code: USD      Dollar

Accounting Date: 04/20/2011

**Amount Summary**

Total Amount: 5,000.00 USD

Add Items From      Select Lines To Display

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

Line:  To:  [Retrieve](#)

**Line**      Customize | Find | View All | Attributes | Contract      First 1 of 1 Last

Line	Description	Physical Nature	Where Service Performed	Zero Price Indicator	Amount Only
1	Blanket Order	Services	Ship To	<input type="checkbox"/>	<input type="checkbox"/>

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

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

46. Click the Save button one last time