



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](#)

Requisitions

Use the following search to look for an existing Requisition.

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit: =

Requisition ID: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

[Search](#)

[Clear](#)

[Basic Search](#)

[Save Search Criteria](#)

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

1. Enter the Business Unit; STCMP (Should default)
 2. Enter the Requisition ID; NEXT (Should default)
 3. Click the Add button
 4. To find a requisition that has already been entered, use the Find an Existing Value tab
 5. Enter the Requisition ID, if you have it
 6. Enter the Business Unit; STCMP (Should default)
 7. Enter the Requester's User ID in the Requester field
- OR
8. Enter the Requester's Name in the Requester Name field
- NOTE: Use the Look-Up icon to search for a requester
9. Click the Search button



Search Results

View All First 1-4 of 4 Last

Business Unit	Requisition ID	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
STCMP	0000000012	Open	ONL	REQUESTER	Requester	N
STCMP	0000000009	Open	ONL	REQUESTER	Requester	Y
STCMP	0000000007	Open	ONL	REQUESTER	Requester	Y
STCMP	0000000005	Approved	ONL	REQUESTER	Requester	N

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

10. Choose the Requisition from the search results

Maintain Requisitions

Requisition

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

Header

*Requester: REQUESTER Requester [Requisition Defaults](#)
*Requisition: 08/02/2010 [Requester Info](#) [Add Comments](#)
Date: [Requisition Activities](#)
Origin: ONL Online
*Currency Code: USD Dollar

Accounting Date: 08/02/2010

Amount Summary

Total Amount: 0.00 USD

Add Items From

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

Line

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

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

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

11. Check the Hold From Further Processing box

12. Click on the 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: Vendor Location:
 Category: [Vendor Lookup](#)

Schedule

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

Distribution

SpeedChart:

Distributions

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

OK Cancel Refresh

Vendor Search

Search Criteria

Name: ShortName:
 City: State:
 Country: Postal:
 Class: Type:
 Max Rows: 10

Search



Search Results

Sel	Vendor ID	Location	Address	Short Vendor Name	Name	Withholding Applicable
<input type="checkbox"/>						

Vendor Detail Address

OK Cancel Refresh

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

13. Select the Override button

14. Click the Vendor Lookup link

OR

15. Click the  next to the Vendor field

If the Vendor Lookup link is used:

16. Enter the first four letters of the vendor's name in the Name field

17. Click the Search button

18. If a vendor list comes up, check the box next to the vendor that is needed

19. Click the OK button



Look Up Vendor

SetID: STCMP
 Vendor ID:
 Short Vendor Name:

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

Vendor ID	Short Vendor Name	Vendor Name 1	Vendor Name 2	Our Customer Number	Old Vendor ID
0000000002	INTEREV-001	Internal Revenue Service	(blank)	(blank)	(blank)
0000000003	FRANTAX-001	Franchise Tax Board	(blank)	(blank)	(blank)
0000000004	16500-001	16500	(blank)	(blank)	16500
0000000005	360SYST-001	360 Systems	(blank)	(blank)	360SYST
0000000006	3DSECUR-001	3D Security & Sound	(blank)	(blank)	3DSECUR
0000000007	3M-001	3M Company	(blank)	(blank)	3M

- If the is used:
20. Type the first four letters of the vendor's name in the Short Vendor Name field
 21. Click the Look Up button
 22. 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.

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: Vendor Location:
 Category: [Vendor Lookup](#)

Schedule

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

Distribution

SpeedChart:

Distributions

Fund	Dept	Program	Location
G0106	41500		STANMSR270

OK Cancel Refresh

23. If this is a blanket order, enter the Unit of Measure; LOT
24. Enter the Due Date; this date is the date the items are wanted in the department

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

For a blanket order the due date would be the end of the fiscal year

25. For Services, change the Distribute by to: Amount only.
26. Customize the Distribution line to what you see here

NOTE: Step 26 only needs to be done once in Production.

27. Enter the Fund, Dept,



and Program of the Chartfield string to be charged for this expenditure.

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

NOTE: If an order is to be split between two different chartfields, leave the main chartfield on this page. See step # for additional chartfields

28. 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.

29. Click the OK button



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

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 comment text area]

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ STCMP-NEXT

OK Cancel Refresh

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

Also only one document can be attached per comment.

Choose File no file selected
Upload Cancel

30. Click on the Add Comments link

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

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

31. Type the comments

- If "To Be Determined" was selected as the vendor, add the vendor you wish Procurement to use
- Add the Vendor Contact with contact name, phone, email, and fax.
- Add contact name and extension for person who can answer questions on this requisition

32. 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 Procurement only

33. If an attachment is available, Select the Attach button

34. Click the Choose File button

35. Choose the file



- 36. Click the Upload button
- 37. Click the OK button

Maintain Requisitions

Requisition

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

Header

*Requester: REQUESTER Requester [Requisition Defaults](#)
 *Requisition: 08/02/2010 [Requester Info](#) [Add Comments](#)
 Date: [Requisition Activities](#)
 Origin: ONL Online
 *Currency Code: USD Dollar

Accounting

Date: 08/02/2010 **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

Maintain Requisitions

Details for Line 1

Requisition ID: NEXT Item: [Description](#)
 Line: 1

Line Details

Buyer: Line Status: Open
 Buyer Name: [Buyer Information](#)
 Category Code: [View Hierarchy](#) **Amount Summary**
 Category: Amount: 0.00 USD
 Document Base Amount: 0.00 USD

Category Description:
 *Transaction Item Description:
 Preferred Language Item Description:


[Expand All](#) [Collapse All](#)

- ▶ Vendor Information
- ▶ Item Information
- ▶ Attributes
- ▶ Contract
- ▶ Sourcing Controls

OK Cancel Refresh

Attributes

Physical Nature: Goods Amount Only
 Zero Price Indicator
 Inspection Required
 Inspect ID:

- 38. Click on the  Line Items icon
- 39. Enter the item description -Descriptions must begin with a word that describes what you are purchasing; for example: computer, plants, etc
- 40. Expand the Attributes section
- 41. If this is a service order, select Services from the drop down menu under Physical Nature
- 42. Check the Amount Only box if the order is to be distributed by amount



rather than quantity. For example-Blanket Orders

- 43. If this is a line item that does not have a price attached to it, select the Zero Price Indicator box

NOTE: If the Zero Price Indicator is selected, Services and the amount only box CANNOT be checked.

- 44. Click the OK button

Maintain Requisitions

Requisition

Business Unit: STCMP Status: Open

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

Hold From Further Processing

Header

*Requester: [Requisition Defaults](#)

*Requisition Date: 05/26/2009 [Requester Info](#)

Origin: ONL Online [Add Comments](#)

*Currency Code: USD Dollar [Requisition Activities](#)

Accounting Date: 05/26/2009

Amount Summary

Total Amount: 0.00 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

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

Line	Description	Quantity	*UOM	Category	Price	Amount	Status	
1	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>


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

When adding additional lines, be sure to save after each line. Remember to save often!

NOTE: Requisition Defaults will only default to the line items once the Save button has been selected.

- 45. Customize the Line to what you see here

NOTE: Step 45 only needs to be done once in Production.

- 46. Enter the quantity; if this is an amount only order, the quantity will default to 1 and CANNOT be changed.
- 47. Enter the UOM, if not entered on the Requisition defaults page
- 48. Enter the Category
- 49. Enter the price per unit
- 50. Select the Line Comments icon  to enter comments pertaining to this line only



Line Comments are used specifically for the item you are ordered. Comments can be directed towards the Vendor, Shipping & Receiving, or Accounts Payable.

Line Comments

Business Unit: STCMP Requisition Date: 05/26/2009
 Requisition ID: NEXT Status: Open Line: 1

*Sort Method: *Sort Sequence:

Comments Find | View All First 1 of 1 Last

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

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

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

From -> REQ STCMP-NEXT

NOTE: Attachments should not be entered on Line Comments.

- 51. Type the comments
- 52. 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 Procurement only

- 53. Click the OK button

NOTE: Only do this step if you want to split transactions between Chartfield Strings.

Maintain Requisitions

Requisition

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

Header

*Requester: [Requisition Defaults](#)
 *Requisition Date: 05/26/2009 [Add Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar
 Accounting Date: 05/26/2009

Amount Summary

Total Amount: 0.00 USD


Add Items From

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

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

Line	Description	Quantity	*UOM	Category	Price	Amount	Status			
1		0.0000			0	0.00	Open	<input type="button" value="Schedule"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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

- 54. Click on the  Schedule icon



Maintain Requisitions

Schedule

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

[Return to Main Page](#)

Line	Item:	Description	Quantity:	0.0000	Each	Amount:	0.00	USD
Schedule								
Sched	1	STANM	0.00000	0.00000		0.00		Active

[Add Ship To Comments](#)

Save Notify Refresh

Add Update/Display

Maintain Requisitions

Distribution

Requisition ID: NEXT Item: Description
Line: 1 Status: Active
Schedule: 1
Ship To: STANMAIN Stan Main Quantity: 0.0000 EA
*Distribute by: Quantity Open Quantity: 0.0000
*Liquidate by: Amount Amount: 0.00 USD

SpeedChart: Multi-SpeedCharts

Distrib	Status	Percent	Quantity	Amount	Fund	Dept	Program	*Location
1	Open		0.0000	0.00	G0106	41500		STANMSR270

OK Cancel Refresh

https://cmsdev4.calstate.edu

Enter number of rows to add:

1

Cancel OK



55. Click on the Distribution icon

56. Customize the Distribution line to what you see here

NOTE: Step 56 only needs to be done once in Production.

57. Enter the percentage amount for the default chartfield string



58. Click the + icon to add another line

59. Enter the number of lines to add; i.e. if adding 2 more chartfield strings type in 2 and click OK

60. Enter the percentage amount for the next chartfield string

61. Enter the Fund, Dept, Prog

62. Click the OK button

63. Repeat Steps #38-62 to enter more than one line item.



Maintain Requisitions
Requisition

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

Header

*Requester: [Requester Info](#) [Requisition Defaults](#)
 *Requisition Date: 05/26/2009 [Add Comments](#)
 Origin: ONL Online [Requisition Activities](#)
 *Currency Code: USD Dollar
 Accounting Date: 05/26/2009

Amount Summary
Total Amount: 0.00 USD

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

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

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

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

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 <input type="text"/>	1	<input type="text"/>

64. Click on the Requisition Activities link

65. Enter comments for Department reference and select the Done box

66. To add additional comments, use the  sign next to the comment

67. Click the OK button when finished

68. Click the Save button

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