



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: STCMP

Requisition ID: NEXT

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
Status: Open
Budget Status: Not Chkd
 Hold Further Processing

Requester: []
 *Requisition Date: 04/08/2014
 Origin: ONL
 *Currency Code: USD
 Accounting Date: 04/08/2014

Amount Summary
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

*Go to: More...

Save, Notify, Refresh

Add, Update/Display

3. Check the Hold From Further Processing box



Maintain Requisitions

Requisition

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

Requisition Name Copy From Hold From Further Processing

▼ Header

*Requester 9000000999 Requester
 *Requisition Date 04/17/2014 Requester Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 04/17/2014

Requisition Defaults Comments
 Requisition Activities Amount Summary

Total Amount 0.00 USD

4. Select Requisition Defaults link

Requisition Defaults

Business Unit STCMP Requisition Date 04/07/2014
 Requisition ID 000002512 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

Buyer Unit of Measure EA
 Supplier 000000553 Supplier Location 001
 Category 20400 Supplier Lookup

Schedule

Ship To STANMAIN CSU Stanislaus Main Campus *Distribute By Quantity
 Due Date 05/31/2014 *Liquidate By Quantity
 Ultimate Use Code
 Attention To

Distribution

SpeedChart

Distributions

Dist	Percent	GL Unit	Fund	Dept	Program	Class	Project	Budget Date	Location	Business Unit
1		STCMI	G010	99999				04/07/2014	STANMSR29	

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 Supplier field to lookup Supplier (formally called Vendor)

7. Type the first four letters of the vendor's name in the Short Vendor



Look Up Supplier

SetID: STCMP

Supplier ID:

Short Supplier Name:

Search Results

View 100 First 1-2 of 2 Last

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

- 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.

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

Requisition Defaults

Business Unit STCMP Requisition Date 04/07/2014

Requisition ID 0000002512 Status Open

Default Options Default Override

Line

Buyer Unit of Measure EA

Supplier 0000000553 Dell Marketing LP Supplier Location 001

Category 20400 Supplier Lookup

Schedule

Ship To STANMAIN CSU Stanislaus Main Campus *Distribute By Quantity

Due Date 05/31/2014 *Liquidate By Quantity

Ultimate Use Code

Attention To

Distribution

SpeedChart

Distributions

Details

Dist	Percent	GL Unit	Fund	Dept	Program	Class	Project
1	<input type="text"/>	STCM <input type="button" value="Q"/>	G0106 <input type="button" value="Q"/>	99999 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

- 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

- Enter the Fund, Dept, Program, and Project 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.

- 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

Distributions Personalize Find View All First 1 of 1 Last

Details

Dist	Percent	GL Unit	Fund	Dept	Program	Project	Location
1		STCMP	G0106	99999			STANMSR290

OK Cancel Refresh

Maintain Requisitions

Requisition

Business Unit STCMP Status Open
 Requisition ID NEXT Budget Status Not Chkd
 Requisition Name Copy From Hold From Further Processing

Header

*Requester 90000000999 Requester
 *Requisition Date 04/17/2014 Requisition Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 04/17/2014

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

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 04/07/2014
 Requisition ID 0000002512 Status Open

Retrieve Active Comments Only Retrieve
 *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

Associated Document
 Attachment Attach View Delete Email

From -> REQ STCMP-0000002512

OK Cancel Refresh

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 ID 0000002512

Requisition Date 04/07/2014
Status Open

Retrieve Active Comments Only

*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

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-0000002512

File Attachment Help

No file selected.

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

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

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

17. Click the Browse 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 04/07/2014
Requisition ID 0000002512 Status Open

Retrieve Active Comments Only Retrieve

*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


Associated Document

Attachment Attach View Delete Email

From -> REQ-STCMP-0000002512

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 Budget Status Not Chkd X
Requisition ID 0000002512 Hold From Further Processing

Requisition Name 0000002512

Header

*Requester 9000000999 Requester
*Requisition Date 04/07/2014 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 04/07/2014

Requisition Defaults Edit Comments Amount Summary
Requisition Activities
Document Status

Total Amount 950.00 USD

Add Items From Select Lines To Display

Purchasing Kit Catalog Search for Lines
Item Search Requester Items Line To Retrieve

Line

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Laptop		1.0000	EA	20400	950.00000	950.00	Open

View Printable Version Delete Requisition *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add Update

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



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

27. Click on the Supplier Information tab

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chk'd

Requester 90000000999
Requisition Date 04/07/2014
Origin ONL
Currency Code USD
Accounting Date 04/07/2014

Amount Summary
Total Amount 950.00 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chk'd

Requester 90000000999
Requisition Date 04/07/2014
Origin ONL
Currency Code USD
Accounting Date 04/07/2014

Amount Summary
Total Amount 950.00 USD

Line	Item	Description	Supplier	Supplier Name	Location
1		Laptop	0000000553	Dell Marketing LP	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
 Requisition ID 0000002512
 Requisition Name 0000002512

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

Header

*Requester 90000000999
 *Requisition Date 04/07/2014
 Origin ONL
 *Currency Code USD
 Accounting Date 04/07/2014

Requester
 Requester Info
 Online Entry
 Dollar

Requisition Defaults
 Requisition Activities
 Document Status

Amount Summary
 Total Amount 950.00 USD

Add Items From
 Purchasing Kit
 Item Search

Catalog
 Requester Items

Select Lines To Display
 Search for Lines
 Line To Retrieve

Line

Line	Item	Description	Supplier	Supplier Name	Location
1		Laptop	0000000553	Dell Marketing LP	001

29. Click on the Attributes tab

Item Search Requester Items

Line To Retrieve

Line

Line	Description	Name	Physical Nature	Zero Price Indicator	Amount Only	Inspection Required	Inspect ID
1	Laptop		Goods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

View Printable Version
 Delete Requisition *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh Add

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

33. Select the Notify button

Maintain Requisitions

Requisition

Business Unit STCMP
 Requisition ID 0000002512
 Requisition Name 0000002512

Status Open
 Budget Status Not Chkd
 Hold From Further Processing

Header

*Requester 9000000999
 *Requisition Date 04/07/2014
 Origin ONL
 *Currency Code USD
 Accounting Date 04/07/2014

Amount Summary
 Total Amount 950.00 USD

Select Lines To Display
 Search for Lines
 Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Laptop	1.0000	EA	20400	950.00000	950.00	Open

Buttons: Save, Return to Search, Previous in List, Next in List, **Notify**, Refresh, Add, Update/Dis

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

To: reviewer@csustan.edu

CC:

BCC:

Priority: 2-Med

Subject: Requisition #0000002512 - Please see Item (1) below

Template: Requisition Notification for STCMP #0000002512. Detail messages are listed below.
 1 - This is a request to approve the Requisition

Message:

Buttons: Lookup Recipient, Delivery Options, RichText

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

**NOTE: If you use the lookup recipient feature the requisition will appear in the recipient's worklist. Although worklist is not functional at this time it may be in the future.

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.

Buttons: OK, Cancel, Apply



Send Notification

Lookup Address

Recipient Search

Name:

Search Results Personalize | Find | View All | [grid icon] | First 1-2 of 2 Last

To	cc	bcc	Recipient	Email Address	User ID
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer1	reviewer1@csustan.edu	90000000998
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reviewer2	reviewer2@csustan.edu	90000000997

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. Check 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

To: Delivery Options

CC:

BCC:

Priority: 2-Med RichText

Subject: Requisition #0000002512 - Please see Item (1) below

Template: Requisition Notification for STCMP #0000002512 - Detail messages are listed below.

1 - This is a request to approve the Requisition
2 - This is a request to...

Message:

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.

- 40. Choose the Priority
- 41. Type the message to the recipient
- 42. Click the OK button

NOTE: Notification is automatic.



Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chk'd

Requester 9000000999
Requester Info
Requisition Date 04/07/2014
Origin ONL
*Currency Code USD
Accounting Date 04/07/2014

Requisition Defaults
Requisition Activities
Document Status

Amount Summary
Total Amount 950.00 USD

Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display
Search for Lines
Line To Retrieve

43. Select the Requisition Activities link

Business Unit STCMP
Requisition ID 0000002512

Requisition Date 04/07/2014
Status Open

Requisition Activities

Done	*Due Date	*SeqNum	Comments
<input type="checkbox"/>	04/17/2014	1	

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
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chk'd

Requester 9000000999
Requester Info
Requisition Date 04/07/2014
Origin ONL
*Currency Code USD
Accounting Date 04/07/2014

Requisition Defaults
Requisition Activities
Document Status

Amount Summary
Total Amount 950.00 USD

Add Items From
Purchasing Kit
Item Search
Catalog
Requester Items

Select Lines To Display
Search for Lines
Line To Retrieve

Line	Item	Description	Supplier	Supplier Name	Location
1		Laptop	0000000553	Dell Marketing LP	001

46. Click the Save button one last time