



Line Item Options

This guide outlines the process for all options relating to the line item itself. The list below will help reference where in the document contents appear.

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Purchasing > Requisition > Add/Update Requisitions

Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value

Add a New Value

Search Criteria

Business Unit: = STCMP

Requisition ID: begins with

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with 90000000999

Requester Name: begins with

Hold From Further Processing

Case Sensitive

Search

Clear

Basic Search



Save Search Criteria

1. Enter the Business Unit; STCMP
2. Enter the Requisition ID OR enter the Requestor User ID
3. Click on the Search button



Search Results

View All First 1-3 of 3 Last

| Business Unit | Requisition ID | Requisition Name | Requisition Status | Origin | Requester | Requester Name | Hold From Further Processing |
|---------------|----------------|------------------|--------------------|--------|-------------|----------------|------------------------------|
| STCMP | 0000002452 | (blank) | Open | ONL | 90000000999 | Requester | Y |
| STCMP | 0000002411 | (blank) | Open | ONL | 90000000999 | Requester | Y |
| STCMP | 0000001986 | (blank) | Approved | ONL | 90000000999 | Requester | N |

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

4. Select the requisition from the Search Results

ADDING ADDITIONAL LINE ITEMS

Requisition

Business Unit: STCMP
Requisition ID: 0000002411
Requisition Name: 0000002411

Status: Open
Budget Status: Not Chkd
 Hold From Further Processing

▼ Header ?

*Requester: 90000000999 Requirer
*Requisition Date: 12/13/2013 Requisition Info
Origin: ONL Online Entry
*Currency Code: USD Dollar
Accounting Date: 02/06/2014


Requisition Defaults Edit Comments
Requisition Activities
Document Status

Amount Summary ?
Total Amount: 960.00 USD

Add Items From ?
Purchasing Kit Catalog
Item Search Requirer Items

Select Lines To Display ?
Search for Lines
Line: [] To: [] Retrieve

| Line | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|------|--------------------------|----------|------|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude ... | 2.0000 | EA | 20400 | 960.00000 | 1,920.00 | Open |

5. Select the  icon to add an additional line item to a requisition

Enter number of rows to add:

1

OK Cancel

6. Click the OK button



Requisition

Business Unit: STCMP
Requisition ID: 0000002411
Requisition Name: 0000002411

Status: Open
Budget Status: Not Chk'd

Hold From Further Processing

Header

*Requester: 9000000999
*Requisition Date: 12/13/2013
Origin: ONL
*Currency Code: USD
Accounting Date: 02/06/2014

Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Amount Summary

Total Amount: 960.00 USD

Add Items From: Purchasing Kit, Catalog, Item Search, Requirer Items

Select Lines To Display

Search for Lines

Line: [] To: [] Retrieve

| Line | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|-----|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 1.0000 | EA | 20400 | 960.00000 | 960.00 | Open |
| 2 | | 0.0000 | | | 0 | 0.00 | Open |

- 7. Enter the item description -Descriptions must begin with a word that describes what you are purchasing; for example: computer, plants, etc
- 8. Enter the quantity
- 9. Enter the UOM; Unit of Measure
- 10. Enter the Category
- 11. Enter the price per unit

DELETING ADDITIONAL LINE ITEMS

Requisition

Business Unit: STCMP
Requisition ID: 0000002411
Requisition Name: 0000002411

Status: Open
Budget Status: Not Chk'd

Hold From Further Processing

Header

*Requester: 9000000999
*Requisition Date: 12/13/2013
Origin: ONL
*Currency Code: USD
Accounting Date: 02/06/2014

Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Amount Summary

Total Amount: 960.00 USD


Add Items From: Purchasing Kit, Catalog, Item Search, Requirer Items

Select Lines To Display

Search for Lines

Line: [] To: [] Retrieve

| Line | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|-----|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 1.0000 | EA | 20400 | 960.00000 | 960.00 | Open |
| 2 | | 0.0000 | | | 0 | 0.00 | Open |

- 12. Select the  icon to delete a line from the requisition



ADD LINE ITEM COMMENTS

Requisition

Business Unit STCMP
 Requisition ID 0000002411
 Requisition Name 0000002411

Status Open
 Budget Status Not Chkd

Hold From Further Processing

Header

*Requester 9000000999 Requester
 *Requisition Date 12/13/2013 Requisition Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 02/06/2014

Requisition Defaults
 Requisition Activities
 Document Status

Amount Summary

Total Amount 960.00 USD

Add Items From

Purchasing Kit
 Item Search

Catalog
 Requisition Items

Select Lines To Display

Search for Lines

Line To Retrieve

| Line | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|-----|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 2.0000 | EA | 20400 | 960.00000 | 1,920.00 | Open |

13. Select the Line
 Comments icon to enter comments pertaining to this line only

NOTE: 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 ID 0000002411

Requisition Date 12/13/2013
 Status Open Line 1

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments

Use Standard Comments
 Use Item Specifications

Comment Status Active Inactivate

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ STCMP-0000002411-1

OK Cancel Refresh

NOTE: Attachments should entered on Header Comments.

14. Type the comments
 15. 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

16. Click the OK button



SPLITTING CHARTFIELD DISTRIBUTION

Requisition

Business Unit STCMP
 Requisition ID 000002411
 Requisition Name 000002411

Status Open
 Budget Status Not Chkd

Hold From Further Processing

▼ Header

*Requester 9000000999 Requester
 *Requisition Date 12/13/2013 Requisition Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 02/06/2014

Requisition Defaults
 Requisition Activities
 Document Status

Amount Summary
 Total Amount 960.00 USD

Add Items From
 Purchasing Kit
 Item Search Catalog
 Requester Items

Select Lines To Display
 Search for Lines
 Line To Retrieve

Line Personalize Find View All First 1 of 1 Last

| Line | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|------|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 2.0000 | EA | 20400 | 960.00000 | 1,920.00 | Open |

17. Click Requisition Defaults

Requisition Defaults

Business Unit STCMP
 Requisition ID 000002411
 Requisition Date 12/13/2013
 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
 Supplier 0000000553 Dell Marketing LP
 Category 20400
 Unit of Measure EA
 Supplier Location 001
 Supplier Lookup

Schedule

Ship To STANMAIN CSU Stanislaus Main Campus
 *Distribute By Quantity
 Due Date 12/20/2013
 *Liquidate By Quantity
 Ultimate Use Code
 Attention To

Distribution
 SpeedChart

Distributions Personalize Find View All First 1 of 1 Last

| Dist | Percent | GL Unit | Fund | Dept | Program | Project | Location |
|------|----------|---------|-------|-------|---------|---------|------------|
| 1 | 100.0000 | STCMP | G0106 | 51600 | | | STANMSR210 |

OK Cancel Refresh

18. Select the Default radio button

19. Click the OK button



Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit STCMP Requisition Date 12/13/2013
 Requisition ID 0000002411 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

| Apply | Distrib Line | Field Name | Field Value | Apply to All Distribs |
|--------------------------|--------------|------------|-------------|--------------------------|
| <input type="checkbox"/> | 1 | GL Unit | STCMP | <input type="checkbox"/> |

OK Cancel Refresh

20. Click the Mark All link

21. Click the OK button

NOTE: The retrofit message comes up anytime you make any changes to the Defaults page.

Requisition

Business Unit STCMP Status Open
 Requisition ID 0000002411 Budget Status Not Chk'd
 Requisition Name 0000002411 Hold From Further Processing

Header

*Requester 9000000999 Requester
 *Requisition Date 12/13/2013
 Origin ONL Requisition Defaults Edit Comments
 *Currency Code USD Requisition Activities
 Accounting Date 02/06/2014 Document Status

Amount Summary

Total Amount 960.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requisition Items

Select Lines To Display

Search for Lines

Line To Retrieve

| Line | Description | Quantity | UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|-----|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 2.0000 | EA | 20400 | 960.00000 | 1,920.00 | Open |

22. Click on the Schedule icon

NOTE: Splitting distributions must be done on each line item that needs to be split between funding sources.



Maintain Requisitions

Schedule

Business Unit STCMP Requisition Date 12/13/2013
 Requisition ID 000002411 Status Open
 Return to Main Page

Line 1 Item Laptop-Dell Latitude E5430 Quantity 2,0000 Each Merchandise Amt 1,920.00 USD


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

Details

| Sched | *Ship To | Quantity | Price | Merchandise Amount | Due Date | Attention To | Status |
|-------|----------|----------|-----------|--------------------|------------|--------------|--------|
| 1 | STANM | 2,0000 | 960.00000 | 1,920.00 | 12/20/2013 | | Active |

Add Ship To Comments

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

23. Click on the  Distribution icon

Maintain Requisitions

Distribution

Requisition ID 000002411 Item Laptop-Dell Latitude E5430
 Line 1 Status Active
 Schedule 1
 Ship To STANMAIN Stan Main Quantity 2,0000 EA
 *Distribute By Quantity Open Quantity 2,0000
 *Liquidate By Quantity Merchandise Amt 1,920.00 USD
 SpeedChart Multi-SpeedCharts

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


Chartfields Asset Information Budget Information

| Distrib | Status | Percent | Quantity | Merchandise Amount | Account | Fund | Dept | Program | Project | *Location |
|---------|--------|----------|----------|--------------------|---------|-------|-------|---------|---------|-----------|
| 1 | Open | 100.0000 | 2,0000 | 1,920.00 | 616002 | G0106 | 51600 | | | STANMSR21 |

OK Cancel Refresh

24. Enter the percentage amount for the default chartfield string

25. Tab

26. Select the  icon to add an additional chartfield line

Enter number of rows to add:

1

OK Cancel

27. Enter the number of lines to add; i.e. if adding 2 more chartfield strings type in 2

28. Click the OK button



Maintain Requisitions

Distribution

Requisition ID 000002411 Item Laptop-Dell Latitude E5430
 Line 1 Status Active
 Schedule 1

Ship To STANMAIN Stan Main Quantity 2.0000 EA
 *Distribute By Quantity Open Quantity 2.0000
 *Liquidate By Quantity Merchandise Amt 1,920.00 USD
 SpeedChart Multi-SpeedCharts

Distributions Personalize | Find | View All | First 1-2 of 2 Last

| Chartfields | Asset Information | Budget Information | Quantity | Merchandise Amount | Account | Fund | Dept | Program | Project | *Location |
|-------------|-------------------|--------------------|----------|--------------------|---------|------|-------|---------|---------|------------|
| 1 | Open | 50.0000 | 1.0000 | 960.00 | 616002 | G010 | 99999 | | | STANMSR290 |
| 2 | Open | 50.0000 | 1.0000 | 960.00 | 616002 | G010 | 99998 | | | STANMSR290 |

OK Cancel Refresh

- 29. Change the Fund, Dept, Program, and Project
- 30. Repeat Steps #17-24 to enter more than one line distribution.
- 31. Click the OK button

NOTE: Once the Ok button is selected the screen will return to the schedule page.

Maintain Requisitions

Schedule

Business Unit STCMP Requisition Date 12/13/2013
 Requisition ID 000002411 Status Open
 Return to Main Page

Line Item Laptop-Dell Latitude E5430 Quantity 2.0000 Each Merchandise Amt 1,920.00 USD

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

Details

| Sched | *Ship To | Quantity | Price | Merchandise Amount | Due Date | Attention To | Status |
|-------|----------|----------|-----------|--------------------|------------|--------------|--------|
| 1 | STANM | 2.0000 | 960.00000 | 1,920.00 | 12/20/2013 | | Active |

Add Ship To Comments

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

- 32. Click the Return to Main Page link

NOTE: PeopleSoft will return back to maintain requisition screen.



VERIFICATION OF COMPLETE REQUISITION

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chkd

Requester: 9000000999
Requester Info
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 |

33. Click on the Supplier Information tab

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002512
Requisition Name 0000002512

Status Open
Budget Status Not Chkd

Requester: 9000000999
Requester Info
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 |

34. 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 Ch'kd

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

Attributes

35. Click on the Attributes tab

Maintain Requisitions
Requisition

Business Unit STCMP
Requisition ID 0000002411
Requisition Name 0000002411

Status Open
Budget Status Not Ch'kd

Requester 9000000999
Requisition Date 12/13/2013
Origin ONL
Currency Code USD
Accounting Date 02/06/2014

Amount Summary
Total Amount 1,920.00 USD

Select Lines To Display
Search for Lines
Line To Retrieve

Line 1
Description Laptop-Dell Latitude
Name
Physical Nature Goods
Zero Price Indicator
Amount Only
Inspection Required

Attributes

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

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



ZERO PRICE INDICATOR

Maintain Requisitions

Requisition

Business Unit STCMP
Requisition ID 0000002411
Requisition Name 0000002411

Status Open
Budget Status Not Chkd
 Hold From Further Processing

Header

*Requester 9000000999
*Requisition Date 12/13/2013
Origin ONL
*Currency Code USD
Accounting Date 02/06/2014

Requester
Requester Info
Online Entry
Dollar

Requisition Defaults
Requisition Activities
Document Status

Edit Comments

Amount Summary

Total Amount 1,927.00 USD

Add Items From

Purchasing Kit
Item Search

Catalog
Requester Items

Select Lines To Display

Search for Lines

Line To Retrieve

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

View Printable Version

*Go to: ...More...

Save Notify Refresh Add Update/Display

38. 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.

39. Click the Save button



NOTIFICATION

Maintain Requisitions
Requisition

Business Unit: STCMP
Requisition ID: 0000002512
Requisition Name: 0000002512

Status: Open
Budget Status: Not Chkd

*Requester: 9000000999
*Requisition Date: 04/07/2014
Origin: CNL
*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 | | 20400 | 950.00000 | 950.00 | Open |

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

40. Select the Notify button

NOTE: Notify is used to let the next individual know this is ready for review.

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:

Lookup Recipient
Delivery Options
 RichText

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

41. 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.



Send Notification

Lookup Address

Recipient Search

Name:

Search Results Personalize | Find | View All | | First 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:

- 42. Enter partial last name in Name: field
- 43. Click the Search button
- 44. Select the To box to select the individual
- 45. Click the Add to Recipient List button
- 46. 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: 2-Med

Subject:

Template:

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.

- 47. Change the Priority if necessary
 - 48. Type the message to the recipient
 - SAMPLE MESSAGE: Dear Reviewer, please review the requisition and forward to the next approving authority.*
 - 49. Click the OK button
- NOTE: Notification is automatic.**



REQUISITION ACTIVITIES

Maintain Requisitions

Requisition

Business Unit STCMP Status Open
 Requisition ID 0000002512 Budget Status Not Chk'd
 Requisition Name 0000002512 Hold From Further Processing

▼ 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
 Requisition Activities
 Document Status

Amount Summary ?
 Total Amount 950.00 USD

Add Items From ?
 Purchasing Kit Catalog
 Item Search Requester Items

Select Lines To Display ?
 Search for Lines
 Line To Retrieve

50. Select the Requisition Activities link

Activities

Business Unit STCMP Requisition Date 04/07/2014
 Requisition ID 0000002512 Status Open

Requisition Activities Personalize | Find | First 1 of 1 Last

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

OK Cancel Refresh

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

SAMPLE COMMENT:
Sent to Reviewer for review. REQ

52. Click the OK button

Requisition

Business Unit STCMP Status Open
 Requisition ID 0000002411 Budget Status Not Chk'd
 Requisition Name 0000002411 Hold From Further Processing

▼ Header ?

*Requester 9000000999 Requester
 *Requisition Date 12/13/2013 Requester Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 02/06/2014

Requisition Defaults Edit Comments
 Requisition Activities
 Document Status

Amount Summary ?
 Total Amount 960.00 USD

Add Items From ?
 Purchasing Kit Catalog
 Item Search Requester Items

Select Lines To Display ?
 Search for Lines
 Line To Retrieve

Line ? Personalize | Find | View All | First 1 of 1 Last

| Line | Description | Quantity | *UOM | Category | Price | Merchandise Amount | Status |
|------|----------------------|----------|------|----------|-----------|--------------------|--------|
| 1 | Laptop-Dell Latitude | 2.0000 | EA | 20400 | 960.00000 | 1,920.00 | Open |

53. Click the Save button one last time