

## 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      Status: Open

Requisition ID: NEXT      Budget Status: Not Chkd

Requisition Name:  Copy From:  Hold From Further Processing

**Header**

\*Requester:       Requisition Date: 04/08/2014      Requester Info

Origin: ONL      Online Entry

\*Currency Code: USD      Dollar

Accounting Date: 04/08/2014

Requisition Defaults      Add Comments      Amount Summary

Requisition Activities      Total Amount: 0.00 USD

Add Items From:

Purchasing Kit      Catalog

Item Search      Requirer Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.00000			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 Chkd

Requisition Name  Copy From   Hold From Further Processing

▼ Header ?

\*Requester 9000000999  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

4. Select Requisition Defaults link

**Requisition Defaults**

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

Dist	Percent	GL Unit	Fund	Dept	Program	Class	Project	Budget Date	Location	Business Unit
1		STCMP	G0106	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 magnifying glass next to the Supplier field to lookup Supplier (formally called Vendor)

**Look Up Supplier**

SetID: STCMP

Supplier ID:

Short Supplier Name:

Basic Lookup

**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)

- 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.**

**\*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: 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: 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**

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

- 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.**

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

**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

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 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				<input type="checkbox"/>

OK      Cancel      Refresh

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

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

File Attachment      Help

Browse...      No file selected.

Upload      Cancel

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.**

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

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

Header

\*Requester 90000000999      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      Total Amount 950.00 USD  
 Document Status

Add Items From      Select Lines To Display

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

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      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

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

Line	Item	Description	Supplier	Supplier Name	Location
1	<span style="color: blue;">🔍</span>	Laptop <span style="color: blue;">🔍</span>	0000000553 <span style="color: blue;">🔍</span>	Dell Marketing LP	001 <span style="color: blue;">🔍</span>

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: 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

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

Line	Item	Description	Supplier	Supplier Name	Location
1	<span style="color: blue;">🔍</span>	Laptop <span style="color: blue;">🔍</span>	0000000553 <span style="color: blue;">🔍</span>	Dell Marketing LP	001 <span style="color: blue;">🔍</span>

29. Click on the Attributes tab



Item Search
Requester Items

Line  To  Retrieve

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

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

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

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/Dis

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**

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:

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.

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 work list. Although work list is not functional at this time it may be in the future.

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### Send Notification

#### Lookup Address

**Recipient Search**

Name: Revi

**Search Results**    Personalize | Find | View All | 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: Reviewer1 / 90000000998

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**

To:

CC:

BCC:

Priority:

Subject:

Template:

1 - This is a request to approve the Requisition

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

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

42. Click the OK button

**NOTE: Notification is automatic.**

### Maintain Requisitions

#### Requisition

Business Unit STCMP      Status Open

Requisition ID 0000002512      Budget Status Not Ch'kd

Requisition Name 0000002512       Hold From Further Processing

▼ Header

\*Requester 90000000999      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](#)      [Amount Summary](#)

[Document Status](#)      Total Amount 950.00 USD

Add Items From

Select Lines To Display

Search for Lines

Line  To

43. Select the Requisition Activities link

**Activities**

Business Unit STCMP  
Requisition ID 0000002512

Requisition Date 04/07/2014  
Status Open

Requisition Activities					Personalize   Find   First 1 of 1 Last
Done	*Due Date	*SeqNum	Comments		
1	04/17/2014	1		+ -	

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 Chkd

Hold From Further Processing

▼ Header

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

Amount Summary

Total Amount 950.00 USD

Add Items From

Purchasing Kit Catalog  
Item Search Requisition Items

Select Lines To Display

Search for Lines

Line  To

Line							Personalize   Find   View All   First 1 of 1 Last
Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls
Line	Item	Description	Supplier	Supplier Name	Location		
1		Laptop	0000000553	Dell Marketing LP	001	+ -	

46. Click the Save button one last time