

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.

Contents

ADDING ADDITIONAL LINE ITEMS.....	2
DELETING ADDITIONAL LINE ITEMS.....	3
ADD LINE ITEM COMMENTS.....	4
SPLITTING CHARTFIELD DISTRIBUTION.....	5
VERIFICATION OF COMPLETE REQUISITION.....	8
ZERO PRICE INDICATOR.....	10
NOTIFICATION.....	11
REQUISITION ACTIVITIES.....	13

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: =

Requisition ID: begins with

Requisition Name: 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

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

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	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

6. Click the OK button

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

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	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 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

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	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 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 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	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 000002411
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-000002411-1

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

17. Click Requisition Defaults

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

Requisition Defaults

18. Select the Default radio button

19. Click the OK button

Business Unit STCMP
 Requisition ID 0000002411
 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
 Due Date 12/20/2013
 *Distribute By Quantity
 *Liquidate By Quantity
 Ultimate Use Code
 Attention To

Distribution

SpeedChart

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

OK Cancel Refresh

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 Distributions' to apply changes to all distribution lines on the requisition.

Mark All Unmark All

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<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 Chkd
 Requisition Name 0000002411 Hold From Further Processing

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

Amount Summary
 Total Amount 960.00 USD

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 0000002411 Status Open


[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amt
1	Laptop-Dell Latitude E5430	2.0000	960.00000	1,920.00 USD

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](#)

23. Click on the  Distribution icon

Maintain Requisitions

Distribution


Requisition ID 0000002411 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

Distrib	Status	Percent	Quantity	Merchandise Amount	Account	Fund	Dept	Program	Project	*Location
1	Open	100.0000	2.0000	1,920.00	616002	G010	51600			STANMSR21

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:

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

Distrib	Status	Percent	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

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	STANMM	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 Status Open Budget Status Not Chkd
 Requisition ID 000002512
 Requisition Name 000002512 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 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	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/Display

33. 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

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls 🔍

Line	Item	Description	Supplier	Supplier Name	Location
1	<input type="text"/> 🔍	Laptop 📄	0000000553 🔍	Dell Marketing LP	001 🔍

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

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls 🔍

Line	Item	Description	Supplier	Supplier Name	Location
1	<input type="text"/> 🔍	Laptop 📄	0000000553 🔍	Dell Marketing LP	001 🔍

34. Click on the Attributes tab

Maintain Requisitions

Requisition

Business Unit STCMP
Requisition ID 0000002411
Requisition Name 0000002411

Status Open
Budget Status Not Chk'd

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 Edit Comments
Requisition Activities
Document Status

Amount Summary

Total Amount 1,920.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display

Search for Lines

Line 1 to 1 Retrieve

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

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

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

Maintain Requisitions

Requisition

Business Unit STCMP
Requisition ID 0000002411
Requisition Name 0000002411

Status Open
Budget Status Not Chk'd

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 Edit Comments
Requisition Activities
Document Status

Amount Summary

Total Amount 1,920.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Select Lines To Display

Search for Lines

Line 1 to 1 Retrieve

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

View Printable Version

*Go to: ...More...

Save Notify Refresh Add Update/Display

37. 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.

38. Click the Save button

NOTIFICATION

39. 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.

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.

OK Cancel Apply

40. 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.

Send Notification

Lookup Address

Recipient Search

Name:

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:

CC:

BCC:

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

Subject:

Template:

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.

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

REQUISITION ACTIVITIES

49. Select the Requisition Activities link

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

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

*SAMPLE COMMENT:
Sent to Reviewer for review. REQ*

51. Click the OK button

52. Click the Save button one last time