

Customization

This guide outlines the process to customize certain sections of a requisition. Customization will make it easier to understand what fields need to be populated versus all the fields available. Customizing only needs to be done once; every time thereafter the customization will be defaulted.

Main Menu > Purchasing > Requisitions > Add/Update Requisitions

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 90000008437 Barnhart, Sandra
 *Requisition Date 10/02/2014 Requisition Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 10/02/2014

Requisition Defaults Add Comments Amount Summary

Requisition Activities

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requester Items

Line

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Computer - Mod	12	ea		0	0.00	Open

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

Save Notify Refresh Add Update/Display

1. Select the Requisition Defaults link

Requisition Defaults

Business Unit STCMP Requisition Date 10/02/2014
 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, only non-blank values are assigned.

Line

Buyer Unit of Measure
 Supplier 0000000553 Dell Marketing LP Supplier Location 001
 Category Supplier Lookup

Schedule

Ship To STANMAIN CSU Stanislaus Main Campus Distribute By Quantity
 Due Date 10/16/2014 *Liquidate By Quantity
 Ultimate Use Code
 Attention To

Distribution

SpeedChart

Distributions

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

Fund	Dept	Program	Project	Location
G0106	51200			STANHC

OK Cancel Refresh

2. ON the Distribution line; scroll to the right
3. Click on the Personalize link

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Details (frozen)
- Dist (frozen)
- Percent
- GL Unit
- Account
- Oper Unit
- Fund
- Dept
- Program
- Class
- Bud Ref
- Product
- Project
- Affiliate
- Fund Affil
- Oper Unit Affil
- Budget Date
- Location
- IN Unit
- Tab Asset Information
- Business Unit
- Profile ID
- Capitalize
- Cost Type
- Description

Hidden
 Frozen

Sort Order

Descending

OK
Cancel
Preview
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4. Highlight the items listed to the left
5. Click Hidden
6. Click the OK button

Requisition Distribution Line

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Computer - Mod	12.0000	EA		0	0.00	Open

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

7. Select the Personalize Link

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Details (frozen)
- Line (frozen)
- (column 3) (frozen)
- Item (frozen)
- Description (frozen)
- (column 6)
- Quantity
- *UOM
- Category
- Price
- Amount
- Status
- (column 22)
- (column 25)
- (column 26)
- Tab Ship To/Due Date
- Due Date
- Ship To
- Price
- (column 31)
- Tab Status
- Status

Hidden
 Frozen

Sort Order

Descending

8. Select Item from the Column Order
9. Click the Hidden box

<p>Manufacturer's Item ID Tab Attributes (column 52) Buyer Name Physical Nature Where Service Performed Zero Price Indicator Amount Only Inspection Required Inspect ID Tab Contract Contract ID Contract Line GPO ID GPO Contract Number Tab Sourcing Controls Source Status *Source Date Calculate Price Override Suggested Vendor Consolidate with other Reqs Sourcing Controls % Unit Price Tolerance % Unit Price Tolerance - Under Unit Price Tolerance Unit Price Tolerance - Under</p>	<p>10. Click the OK button</p>
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[Delete Settings](#)

Schedule, Distribution

11. In the Line area, select the schedule icon

12. On the Schedule page, click on the Distribution icon

13. On the Distribution line, select the Personalize link

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Chartfields (frozen)
- Distrib (hidden)
- Status (hidden)
- Percent (frozen)
- Quantity
- Merchandise Amount
- GL Unit (hidden)
- Account
- Oper Unit (hidden)
- Fund
- Dept
- Program
- Class
- Bud Ref (hidden)
- Product (hidden)
- Project
- Affiliate (hidden)
- Fund Affiliate (hidden)
- Oper Unit Affil (hidden)
- Tab Details (hidden)
- *Location (hidden)
- IN Unit (hidden)
- Statistics Code (hidden)
- Open Quantity (hidden)
- GL Base Amount (hidden)
- Base Currency (hidden)
- Exchange Rate Detail (hidden)
- Tab Asset Information (hidden)

Sort Order

Descending

- AM Unit (hidden)
- Profile ID (hidden)
- CAP # (hidden)
- Sequence (hidden)
- Tag Number (hidden)
- Empl ID (hidden)
- Capitalize (hidden)
- Cost Type (hidden)
- Description (hidden)
- Tab Budget Information (hidden)
- Budget Status (hidden)
- Budget Date (hidden)
- Merchandise Amount (hidden)
- Pre-Encumbrance Balance (hidden)
- Currency (hidden)
- Pre-Encumbered Base Balance (hidden)
- Base Currency (hidden)
- Commitment Control Close Flag (hidden)

14. Select all the items in the Column Order
15. Click the Hidden box
16. Select the OK button