Requisition – Personalize My Entry Fields

Direct questions to Procurement & Contract Services, x5134
Personalization of Entry Fields

Refer to ‘Log into PeopleSoft Financials’ guide for login instructions.

• Once logged in, click on the 📈 in the top right of the page.

• Click ‘Navigator’

• Click ‘Purchasing’

• Click on ‘Requisitions’

• Click on ‘Add/Update Requisitions’
Personalization of Entry Fields (cont.)

• Click ‘Add’ to enter a new requisition.

• Click on ‘Requisition Defaults’ link.
Personalization of Entry Fields (cont.)

• On Requisition Defaults page, click the ‘Supplier Lookup’ link.

• On the Supplier Search page, click the ‘Personalize’ link.
Personalization of Entry Fields (cont.)

• Click the ‘Copy Settings’ link.

• Click the icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.

• Click ‘OK’ on the Personalize Column and Sort Order page.
Personalization of Entry Fields (cont.)

Requisition Defaults

• Click the ‘Personalize’ link. *(Scroll to the far right to find the link).*

• Click ‘Copy Settings’.
Personalization of Entry Fields (cont.)

• Click the icon next to the ‘Settings to Copy’ box.

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

**Lines**

- On the **Maintain Requisitions** page, click on the ‘Personalize’ link on Lines.

- On the **Personalize Column and Sort Order** screen, scroll down and click on ‘Copy Settings’.
Personalization of Entry Fields (cont.)

• Click the search icon next to the ‘Settings to Copy’ box.

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

Schedules

- To open the ‘Schedule’ the **UOM** field must have a value. Enter ‘ea’ in the UOM field.

- Click the **Schedules** icon at the end of the Lines section.

- On the **Schedule** page, click the ‘Personalize’ link.
Personalization of Entry Fields (cont.)

• Click ‘Copy Settings’.

• Click the icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

Distribution

- On the **Schedule** page, click the Distribution icon.

- On the **Distribution** page, click the ‘Personalize’ link. *(Scroll to the far right to find the link).*
Personalization of Entry Fields (cont.)

• On the **Personalize Column and Sort Order** screen, scroll down and click on ‘Copy Settings’.

• Click the ![search icon] icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

Distribution (cont.)

• Click ‘Cancel’ to close the Distribution page.

• One the Schedule page, click the ‘Return to Main Page’ link.
Personalization of Entry Fields (cont.)

Finish

After all 5 areas have been customized, close the Maintain Requisitions page:

• Click ‘Add/Update Requisitions’ on the Menu to add a Requisition.

  OR

• Click the ‘Sign out’ in the upper right corner of the page to exit PeopleSoft.

• If the ‘Save Warning’ message pops up, click the ‘Cancel’ box. (Customizations will be saved.)