Requisition Entry Guide

Direct questions to Procurement & Contract Services, x5134
Requisition Entry Guide

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’
Requisition Entry Guide (cont.)

• Click on ‘Requisitions’

• Click on ‘Add/Update Requisitions’

Note: The first time this page is accessed, click the ‘Add To’ link to create a tile on your Homepage or add to your NavBar/Favorites. See ‘Creating a Tile and Adding to Favorites’ guide for further instructions.
Add a Requisition

- Click ‘Add’ to enter a new requisition.
- Click the add icon to add the person entering the Requisition as the ‘Requestor’.
- Click the ‘Requisition Defaults’ link.
Requisition Entry Guide (cont.)

Requisition Defaults

• Click on ‘Override’

• Leave the ‘Buyer’ field blank. The Buyer will be assigned by Procurement staff.

• Click on ‘Supplier Lookup’ to search for a Supplier.

Supplier Lookup

• Enter the first few characters of the supplier’s name in the ‘Name’ field.

• Click ‘Search’ to bring up a list of suppliers based on the criteria entered.
Supplier Lookup (cont.)

- If the requested supplier is not displayed on the first page, use the ⏯️ ⏯️ ⏯️ ⏯️ to scroll through the list of suppliers.
- Select a supplier by checking the box in the corresponding row.
- Click ‘Ok’.

Note: if supplier is not located, enter the Wildcard symbol, ‘%’ before and after one word in the supplier name and click ‘Search’.

Example: To search for a supplier with PAPER in the name, use the Wildcard %. This will display all vendors with Paper anywhere in the name.
Suggested Supplier

• If the supplier could not be located, enter a ‘1’ in the ‘Name’ field.

• Click ‘Search’.

• Click the box associated with ‘1 SUGGESTED SUPPLIER’.

• Click ‘Ok’ to be directed back to the Requisition Defaults page.

Note: The new supplier name, address and other pertinent information will be entered in the ‘Add Comments’ section.
Requisition Entry Guide (cont.)

Category

• Enter a ‘Category’. Use the to search for the appropriate Category value.

• To search for a Category, type in the ‘Description’ of the item to be ordered.

• Click ‘Look Up’.

• Click the appropriate category.

• To search for values with a common Category, change the search criteria in the Description field.

Note: If multiple lines are added to the Requisition and have a different Category value, the Category can be added with the Line Details. (See – Line Details, Additional Information on UOM & Category).
Requisition Entry Guide (cont.)

Unit of Measurement
• Select a ‘Unit of Measurement’ using the icon.

Ship To
• Select the ‘Ship To’ value if it is not already filled in.

Due Date
• Select the ‘Due Date’. This should be the expected delivery date of the product or service.

Chartfield and Location
• Enter the ‘Chartfield’ information in the ‘Dept’/‘Fund’/‘Account’ fields.
• Scroll over to the right and using the icon, select the campus delivery location for a commodity order, or select NA for service orders.
• Click ‘Ok’.

Select "RECEIVING" for commodity orders and "NA" for service orders.
Requisition Entry Guide (cont.)

Note: Returning to the ‘Requisition Defaults’ page and making a change may trigger a ‘Retrofit’ prompt.

- If the prompt is displayed, check the ‘Mark All’ box.
- Click ‘Ok’.
- This action will retrofit the changes to all lines on the Requisition.

Line Details-Quantity, Description, & Price.

- In the Line, enter the Quantity, Description and Price.
- Click ‘Save’.

- The ‘Requisition ID’ will be assigned after info is saved.
Requisition Entry Guide (cont.)

• To enter additional lines, click the icon at the far right of the line.

• A prompt window will open with ‘1’ defaulting as the number of rows (lines) to add.

• Click ‘Ok’. (It is best to add one line at a time).

• The new line will be inserted as shown.

• Complete these steps for each additional line needed.
Requisition Entry Guide (cont.)

- After entering all line items, click the ‘Add Comments’ link in the Header section.

- Click the ‘Use Standard Comments’ link to add the REQUIRED COMMENT.

- This comment must be added to all Requisitions.
In ‘Comment Type’ field, type ‘DPT’.

In ‘Comment ID’ field, type ‘0001’.

Click ‘Ok’.

Fill in the ‘Department information, Delivery Location, and Chartfield.

Click ‘Send to Supplier’ box, so the comments will display on the printed copy.

Click ‘Ok’ to close the comments page.
Requisition Entry Guide (cont.)

To use the Suggested Vendor Comment

- To add the **Suggested Supplier** information, select ‘SPLR’ on the ‘Comment ID’ page.

- Click ‘OK’ on the Standard Comments page.

- Fill in information necessary to complete the comment section.

- Check the ✓ ‘Send to Supplier’ box.
• When the Comments are completed, click ‘OK’ to return to the Maintain Requisition page.

• On the Maintain Requisition page, click ‘Save’.

Note:
Click the icon to spell check the comment. Click the Inactivate button to delete the comment.
Requisition Entry Guide (cont.)

Approve the Requisition

- To **Approve** the Requisition, click the ✓ in the upper right corner of the Maintain Requisition page.

- Click ‘Save’.

Or

- If the person entering the Requisition is not authorized to approve it, **or** to suspend the Requisition and complete it later, click the ‘Hold From Further Processing’ box.

- Click ‘Save’.
The Requestor can make changes to the Requisition until 5:00pm of the day it is entered or approved. For changes after this deadline, contact Procurement & Contract Services, x5134. Approved Requisitions will be converted to a Purchase Order by the Procurement & Contract Services staff. To view the status of a Requisition, refer to the Requisition Document Status Guide. Please write the Requisition number on all back up documentation (quotes, pricing, Sole Source Justification, etc.) and send it to Procurement & Contract Services, Zip 244.