Requisition – Multiple Chartfields

Direct questions to Procurement & Contract Services, x5134
Multiple Chartfields

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

• On the **NavBar** select:
  • ‘Navigator’
  • ‘Purchasing’
  • ‘Requisitions’
  • ‘Add/Update Requisition’
Multiple Chartfields (cont.)

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.

*Refer to ‘Creating a Tile and Adding to Favorites in PeopleSoft Financials’ guide for instructions.
Multiple Chartfields (cont.)

Find a Requisition

- Select the ‘Find an Existing Value’ tab.
- Enter the ‘Requisition ID’ number; it will be 10 digits including the leading zeros.
- Click the ‘Search’ button or use the enter key.
Multiple Chartfields (cont.)

Requisition Distribution

• To split the distribution or make a change to the Chartfield, go to Maintain Requisition page.

• Click the ‘Schedule’ icon on the line needing the split or change.

• On the Schedule page, click the ‘Distribution’ icon.
Multiple Chartfields (cont.)

To Split the distribution:

• In the **Distribution by** box, use dropdown to select a method for the split, either ‘Quantity’ or ‘Amount’.

• Use the icon to add a distribution line.

• At the prompt, enter the number of distribution lines needed.

• Click ‘OK’.
Multiple Chartfields (cont.)

- To distribute by **Quantity**, adjust the ‘Quantity’ and ‘Chartfield’.

- To distribute by **Amount**, adjust the ‘Percent’ or Amount’ and the ‘Chartfield’.

- To make a change to a **Chartfield**, adjust the Chartfield on the existing distribution line.

- Click ‘OK’ when the distribution split or change is complete.
Multiple Chartfields (cont.)

• Click the ‘Return to Main Page’ link on the Schedule page.

• Click ‘Save’ on the Maintain Requisitions page.