

CFS **Common Financial System**


California State University, Chico

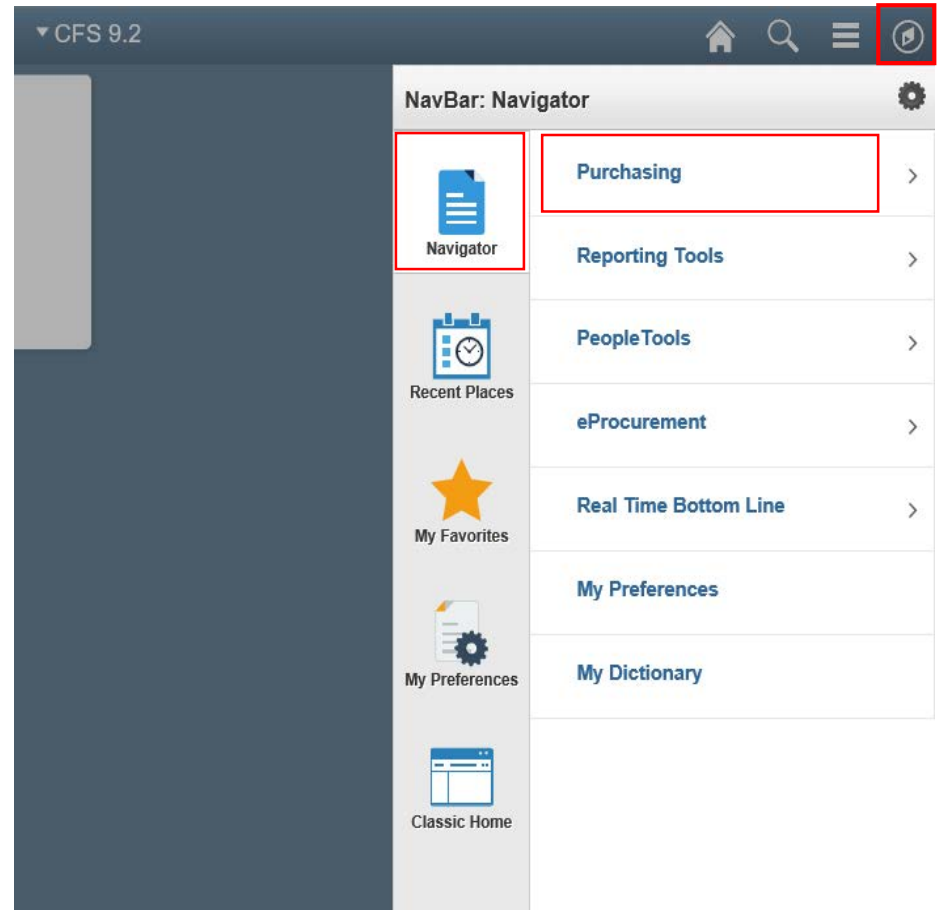
Requisition – Copy an Existing Requisition

Direct questions to Procurement & Contract Services, x5134

Copy an Existing Requisition

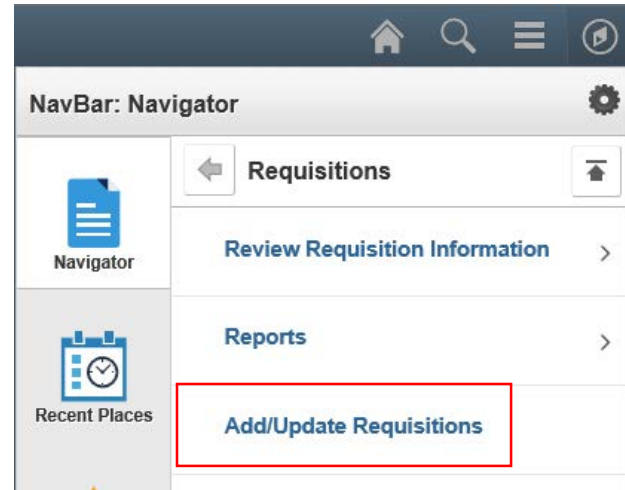
Refer to 'Log into PeopleSoft Financials' guide for login instructions.

- Once logged in, click on the  in the top right of the page.
- Click 'Navigator'
- Click 'Purchasing'



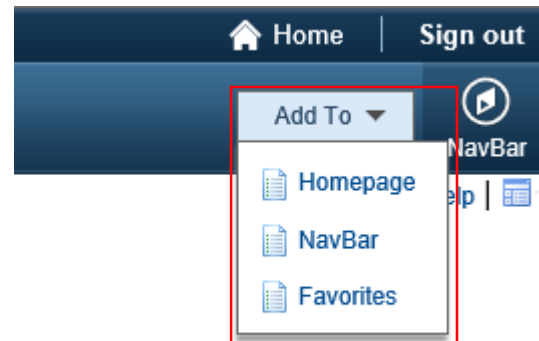
Copy an Existing Requisition (cont.)

- 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.

**Refer to 'Creating a Tile in PeopleSoft Financials' Guide for more instructions.*



Copy an Existing Requisition (cont.)

- Click 'Add' to enter a new requisition.
- Click the 'Copy From' link at the top of the **Maintain Requisition** page.

Requisitions

Find an Existing Value

Add a New Value

Business Unit: CHICO

Requisition ID: NEXT

Add

Maintain Requisitions

Requisition

Business Unit: CHICO
Requisition ID: NEXT
Requisition Name: [Copy From](#)

Status: Open
Budget Status: Not CN'd
 Hold From Further Processing

Header

*Requester:
*Requisition Date: 03/10/2014
Origin: ONL
*Currency Code: USD
Accounting Date: 03/10/2014

Requester Info
Online Entry
Dollar

Requisition Details
Requisition Activities

Add Comments

Amount Summary

Total Amount: 0.00 USD

Copy an Existing Requisition (cont.)

- Enter the requisition number to be copied in the 'Requisition ID' box.
- Click 'Search'.
- Use the 🔍 to find a requisition by Requestor ID.
- The requisition number to be copied will display at the bottom of the page in the Requisition box.
- Click 'OK'.
- Click 'Yes' on the **Source Requestor** message.

Maintain Requisitions

Copy Requisition

Header

Business Unit CHICO
Requisition ID 0000011864 🔍
Requisition Name 🔍
Req Status 🔍
Requester 🔍
Requester Name 🔍
Requisition Date 📅
Supplier SetID CHICO Supplier Lookup
Supplier ID 🔍 Supplier Details
Item SetID CHICO
Item Description 🔍
Department 🔍

Origin 🔍
Card Number
To 📅
Supplier Name 🔍
Item ID 🔍
 Direct Ship


Requisition						Personalize	Find	View All	📄	📄	First	1 of 1	Last
Set	Req ID	Requisition Name	Status	Origin	Requester								
<input checked="" type="checkbox"/>	0000011864	0000011864	Open	ONL	20000042745								

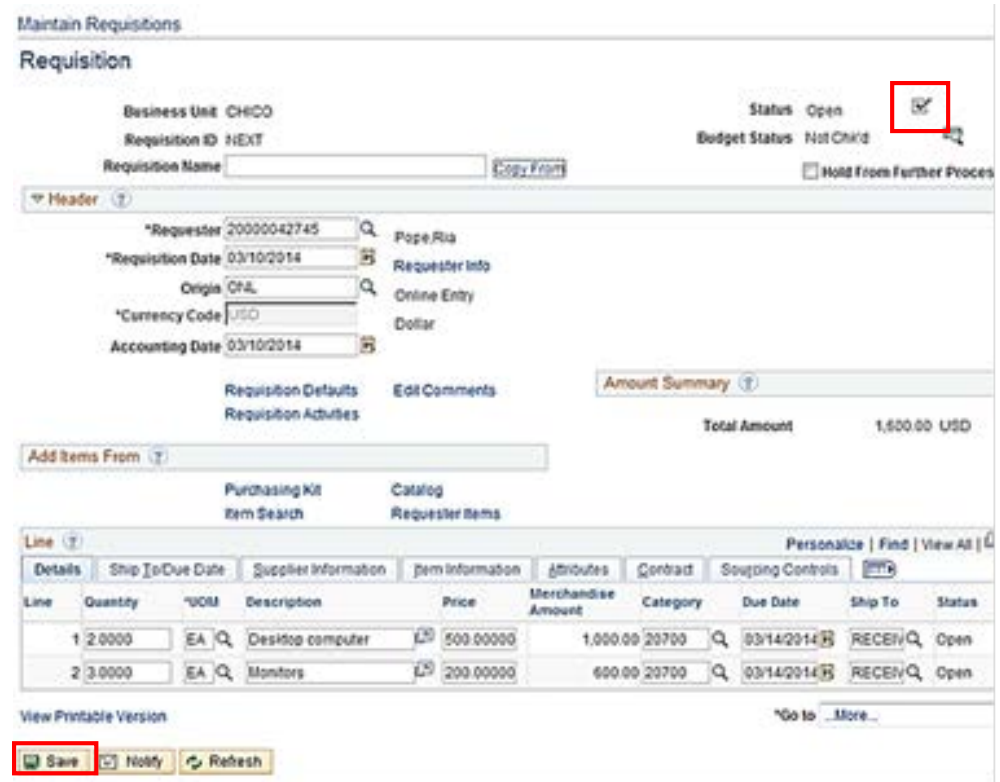
Message

The source requester (20000042745) is different from the target requester (), copy? (10150,186)

All copied defaults will remain unchanged. Do you want to copy?

Copy an Existing Requisition (cont.)

- The **Maintain Requisitions** page will open a copy of the requisition for editing.
- Make changes and additions necessary to update the requisition.
- After editing is complete, click the  to **Approve** the requisition.
- Click 'Save' to finish.



Maintain Requisitions

Requisition

Business Unit: CHCO
Requisition ID: HEXT
Status: Open
Budget Status: Not Chkd

Requisition Name: Copy From

Header

*Requester: 20000042745
Requester Info: Pope, Ria
*Request Date: 03/10/2014
Origin: OPL
Online Entry: Dollar
*Currency Code: USD
Accounting Date: 03/10/2014

Amount Summary

Total Amount: 1,500.00 USD

Add Items From

Purchasing Kit
Catalog

Line	Quantity	UOM	Description	Price	Merchandise Amount	Category	Due Date	Ship To	Status
1	2.0000	EA	Desktop computer	500.00000	1,000.00	20700	03/14/2014	RECEN	Open
2	3.0000	EA	Monitors	200.00000	600.00	20700	03/14/2014	RECEN	Open

View Printable Version

Save Notify Refresh