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 ℹ️ 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 search 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’
- Click on the magnifying glass next to ‘Buyer’ to select the Buyer that is assigned to your Department, College or Unit.
- On the ‘Look Up Buyer’ screen, type ‘20’ next to ‘Buyer’ to narrow your search to CSU, Chico only.
- Click ‘Look Up’.
- In ‘Search Results’, click on your assigned buyer.
- Once you have selected your buyer, click on ‘Supplier Lookup’ to search for a Supplier.
Requisition Entry Guide (cont.)

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.
- If the requested supplier is not displayed on the first page, use the 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’.

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.

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.
Category

- Enter a ‘Category’. Use the search 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 (In order of: type, brand, model #, etc., for example ‘Computer, Dell, 123456) 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.
Requisition Entry Guide (cont.)

- 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.
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.
Requisition Entry Guide (cont.)

- 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.