

**CFS** **Common**  
**Financial**  
**System**

California State University, Chico

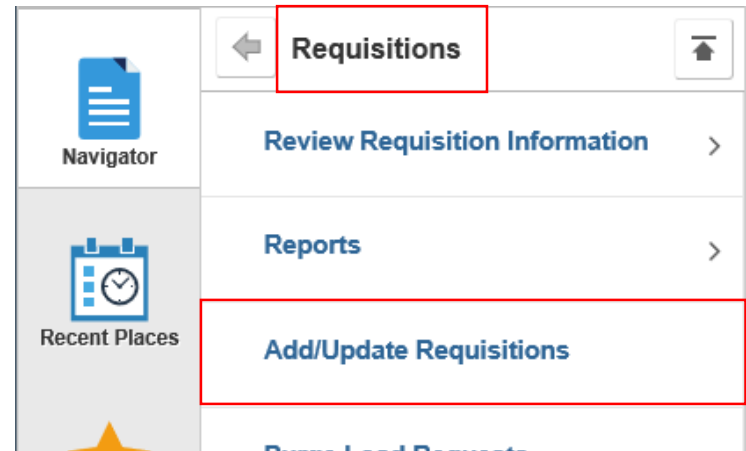
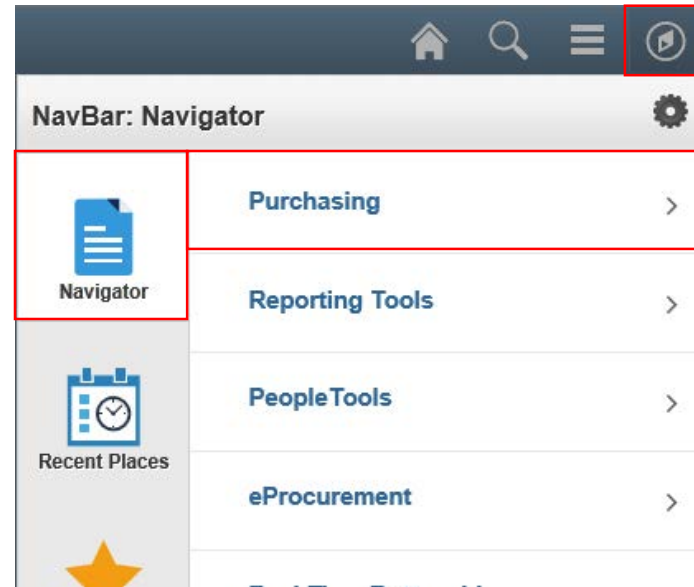
**Requisition – Multiple Chartfields**

Direct questions to Procurement & Contract Services, x5134

# Multiple Chartfields

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

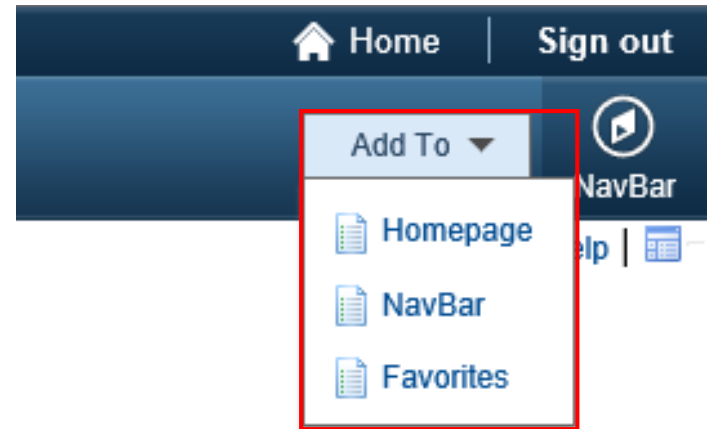
- On the **NavBar** select:
  - 'Navigator'
  - 'Purchasing'
  - 'Requisitions'
  - 'Add/Update Requisition'



## 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.

**Requisitions**

[Find an Existing Value](#) [Add a New Value](#)

Business Unit: CHICO 🔍  
Requisition ID: NEXT

[Add](#)

**Requisitions**

Use the following search to look for an existing Requisition.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria



Business Unit: = CHICO 🔍  
Requisition ID: begins with 0000011863  
Requisition Name: begins with  
Requisition Status: =  
Origin: begins with 🔍  
Requester: begins with 🔍  
Requester Name: begins with 🔍  
Hold From Further Processing   
 Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

# 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.

Maintain Requisitions

Requisition

Business Unit: CHICO  
Requisition ID: 0000011854  
Requisition Name: 0000011854

States: Approved  
Budget States: Not Ch'd

Hold From Further Processing

▼ Header ▼

\*Requester: 20000042745 Pope, Ria  
\*Requisition Date: 10/13/2013  
Origin: OTEL  
\*Currency Code: USD  
Accounting Date: 10/31/2013

Requester Info  
Online Entry  
Dollar

Requisition Defaults  
Requisition Activities  
Document Status

Edit Comments

Amount Summary ▼




Total Amount: 1,600.00 USD

Add Items From ▼

Purchasing Kit Item Search  
Catalog Requisition Items

Select Lines To Display ▼

Search for Lines  
Line: \_\_\_\_\_ To: \_\_\_\_\_

Line	Ship To	Due Date	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	Personalize	Find	View All	First	1-2 of 2	Last
1	20000	KA	Desktop computer	500.00000	1,000.00	20300	03/14/2014	RECEIV	Approved				


Maintain Requisitions

Schedule

Business Unit: CHICO  
Requisition ID: 0000011854  
Requisition Date: 10/13/2013  
Status: Approved

Return to Main Page

Line

Line	Item	Description	Quantity	Unit	Merchandise Amt	Find	View All	First
1	Item	Desktop computer	2,0000	Each	1,000.00 USD			


Schedule

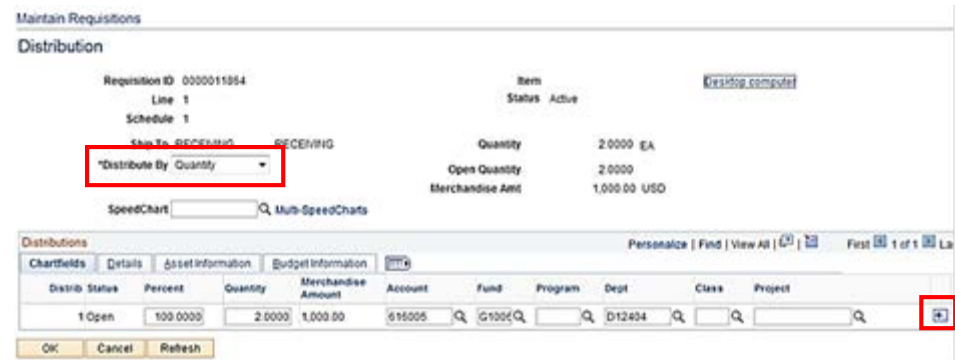
Personalize | Find | View All | First

Sched	Quantity	Price	Merchandise Amount	Ship To	Due Date	Attention To	Status
1	2,0000	500.00000	1,000.00	RECEIV	03/14/2014	Pope, Ria	 Active

# 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'.



Maintain Requisitions

Distribution

Requisition ID 0000011004

Line 1

Schedule 1

Item Status Active

Residue Computer

Quantity 2.0000 EA

Open Quantity 2.0000

Merchandise Amt 1,000.00 USD

SpeedChart Multi-SpeedCharts

Distributions

Personalize | Find | View All | First 1 of 1

Distrib Status	Percent	Quantity	Merchandise Amount	Account	Fund	Program	Dept	Class	Project
1 Open	100.0000	2.0000	1,000.00	695005	G1000		D12434		

OK Cancel Refresh



Explorer User Prompt

Script Prompt:

Enter number of rows to add:

OK

Cancel

# Multiple Chartfields (cont.)

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

Maintain Requisitions  
Distribution

Requisition ID 000011864  
Line 1  
Schedule 1

Ship To: RECEIVING RECEIVING

\*Distribute By: Quantity

SpeedChart:  Multi-SpeedCharts

Item Status: Active Desktop computer

Quantity: 2,000 EA  
Open Quantity: 2,000  
Merchandise Amt: 1,000.00 USD

Distributions

Distrib	Status	Percent	Quantity	Merchandise Amount	Account	Fund	Program	Dept	Class	Project
1	Open	50.0000	1,000.00	500.00	616005	G100		D12404		
2	Open	50.0000	1,000.00	500.00	616005	G100		D12400		

OK Cancel Refresh

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

Maintain Requisitions  
Distribution

Requisition ID 000011864  
Line 1  
Schedule 1

Ship To: RECEIVING RECEIVING

\*Distribute By: Amount

SpeedChart:  Multi-SpeedCharts

Item Status: Active Desktop computer

Quantity: 2,000 EA  
Open Amount: 1,000.00  
Merchandise Amt: 1,000.00 USD

Distributions

Distrib	Status	Percent	Merchandise Amount	Account	Fund	Program	Dept	Class	Project
1	Open	50.0000	500.00	616005	G100		D12404		
2	Open	50.0000	500.00	616005	G100		D12400		

OK Cancel Refresh

- 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.

Maintain Requisitions  
Distribution

Requisition ID 000011864  
Line 1  
Schedule 1

Ship To: RECEIVING RECEIVING

\*Distribute By: Quantity

SpeedChart:  Multi-SpeedCharts

Item Status: Active Desktop computer

Quantity: 2,000 EA  
Open Quantity: 2,000  
Merchandise Amt: 1,000.00 USD

Distributions

Distrib	Status	Percent	Quantity	Merchandise Amount	Account	Fund	Program	Dept	Class	Project
1	Open	100.0000	2,000.00	1,000.00	616005	G100		D12404		

OK Cancel Refresh

# Multiple Chartfields (cont.)

- Click the 'Return to Main Page' link on the **Schedule** page.

Maintain Requisitions

Schedule

Business Unit CHICO Requisition Date 10/13/2013  
Requisition ID 0000011864 Status Approved

[Return to Main Page](#)

Line Find | View All

Line	Item	Quantity	Each	Merchandise Amt	1,000.00
1	Desktop computer	2,000	Each		1,000.00

Schedule Personalize | Find | View All | [?] | [?]

Details [?]

Sched	Quantity	Price	Merchandise Amount	*Ship To	Due Date	Attention To	Status
1	2,000	500.00000	1,000.00	RECEIV	03/14/2014	Pope,Ria	Active

Add Ship To Comments

- Click 'Save' on the **Maintain Requisitions** page.

Maintain Requisitions

Requisition

Business Unit CHICO Status Approved  
Requisition ID 0000011864 Budget Status Not Chkd  
Requisition Name 0000011864  Hold from Further Processing

Header

\*Requester 20000042745 Pope,Ria  
\*Requisition Date 10/13/2013 Requirer Info  
Origin CHL Online Entry  
Currency Code USD Dollar  
Accounting Date 10/31/2013

Requisition Defaults Edit Comments  
Requisition Activities  
Document Status

Amount Summary  
Total Amount 1,600.00 USD

Add Items From

Purchasing Kit Catalog  
Item Search Requirer Items

Select Lines To Display  
Search for Lines  
Line [?] To [?] Retrieve

Line Personalize | Find | View All | [?] | [?] First 1-2 of 2

Line	Quantity	*QTY	Description	Price	Merchandise Amount	Category	Due Date	Ship To	Status
1	2,000	EA	Desktop computer	500.00000	1,000.00	20700	03/14/2014	RECEIV	Approved
2	3,000	EA	Monitors	200.00000	600.00	20700	03/14/2014	RECEIV	Approved

View Printable Version \*Go to ...More...

Save Return to Search Notify Refresh