Requisition – Personalize My Entry Fields

Direct questions to Procurement & Contract Services, x5134
Personalization of Entry Fields

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

In the Add/Update Requisition page, there are 5 main screens to personalize. These instructions will change the entry fields so the end user will only see the fields that Chico State uses. This also helps CFS screens be consistent across campus.

- Once logged in, click on the menu icon in the top right of the page to access the NavBar.

- Click ‘Menu’

- Click ‘Purchasing’

- Click ‘Requisitions’

- Click ‘Add/Update Requisitions’
Personalization of Entry Fields (cont.)

• Click ‘Add’ to enter a new requisition.

To prevent any loss of data entry, it’s best to set up the personalization within a new requisition, as instructed.

• Click on ‘Requisition Defaults’ link.
Personalization of Entry Fields (cont.)

1. **Supplier Search**

• On **Requisition Defaults** page, click the ‘Supplier Lookup’ link.

• On the **Supplier Search** page, click the Grid Action Menu button, then click the ‘Personalize’ link.
Personalization of Entry Fields (cont.)

• Click the ‘Copy Settings’ link.

• Click the icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.

• Click ‘OK’ on the Personalize Column and Sort Order page.
Personalization of Entry Fields (cont.)

2. Requisition Defaults

• On Requisition Defaults page click the Grid Action Menu button, then click the ‘Personalize’ link.

• Click ‘Copy Settings’.
• Click the icon next to the ‘Settings to Copy’ box.

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

3. **Main Page/Lines**

- **On the Maintain Requisitions page**, under **Lines**, click the Grid Action Menu button, then click the ‘Personalize’ link.

- **On the Personalize Column and Sort Order screen**, scroll down and click on ‘Copy Settings’.
Personalization of Entry Fields (cont.)

• Click the icon next to the ‘Settings to Copy’ box.

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
4. **Schedule**

- To open the ‘Schedule’ the **UOM** field must have a value. Enter ‘ea’ in the UOM field.

- Click the **Schedule** icon at the end of the Lines section.

- On the **Schedule** page, click the Grid Action Menu button, then click the ‘Personalize’ link.
Personalization of Entry Fields (cont.)

• Click ‘Copy Settings’.

• Click the icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the **Search Results** box.

• Click ‘OK’ on the **Copy Settings** page.
5. **Distribution**

- On the **Schedule** page, click the Distribution icon.

- On the **Distribution** page, click the Grid Action Menu button, then click the ‘Personalize’ link.
Personalization of Entry Fields (cont.)

• On the **Personalize Column and Sort Order** screen, scroll down and click on ‘Copy Settings’.

• Click the ![icon] icon next to the ‘Settings to Copy’ box.
Personalization of Entry Fields (cont.)

• Click the ‘CHICO_REQ’ link in the Search Results box.

• Click ‘OK’ on the Copy Settings page.
Personalization of Entry Fields (cont.)

Distribution (cont.)

• Click ‘Cancel’ to close the Distribution page.

• One the **Schedule** page, click the ‘Return to Main Page’ link.
Finish

After all 5 screens have been personalized/customized, close the Maintain Requisitions page, click the home button, or sign out.

• If the ‘Save Warning’ message pops up, click the ‘No’ box. (Personalizations have already been saved.)