

CFS **Common Financial System**

California State University, Chico


Requisition – Personalize My Entry Fields

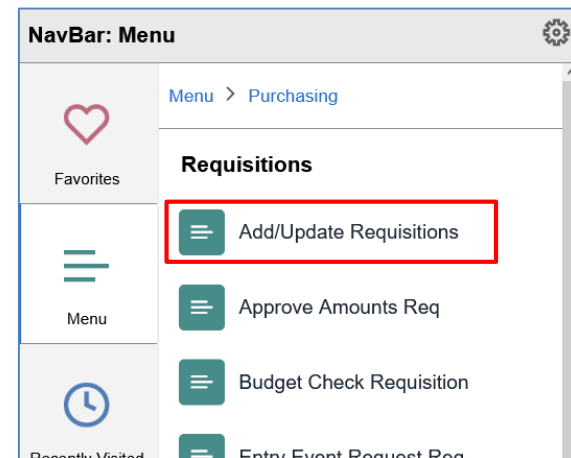
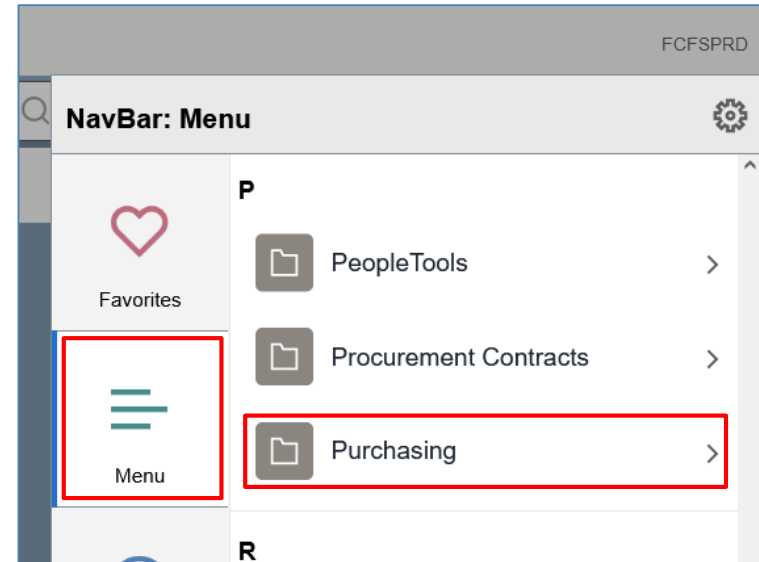
Direct questions to Procurement & Contract Services, x5134

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.

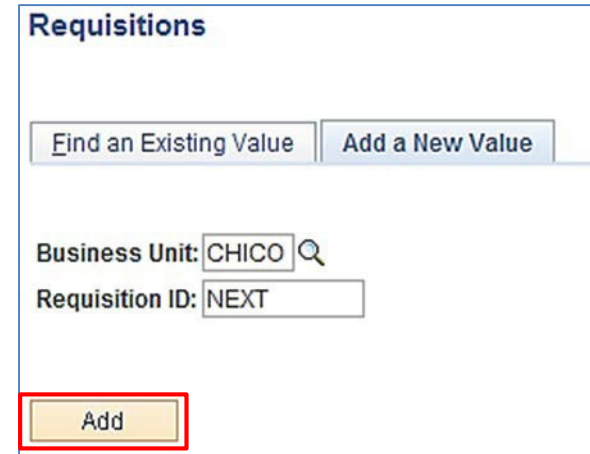
- Once logged in, click on the  in the top right of the page to access the NavBar.
- Click 'Menu'
- Click 'Purchasing'
- Click 'Requisitions'
- Click 'Add/Update Requisitions'



Personalization of Entry Fields (cont.)

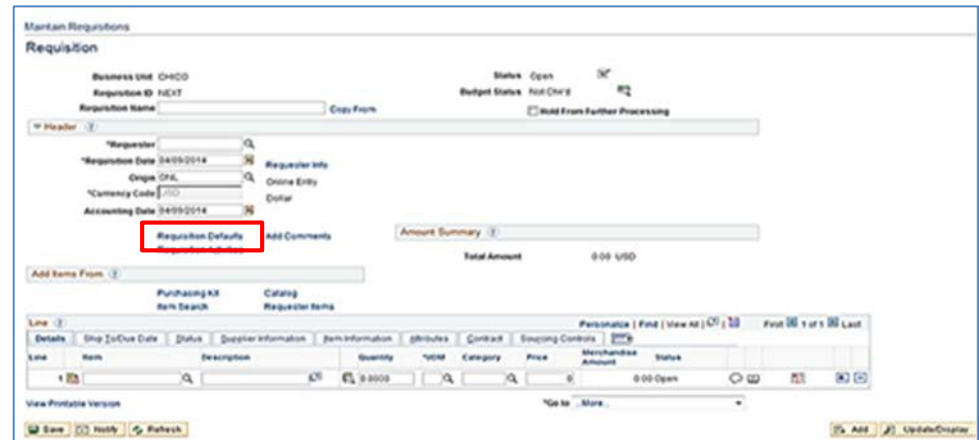
- Click 'Add' to enter a new requisition.

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



The screenshot shows a web form titled "Requisitions". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these, there are two input fields: "Business Unit:" with the value "CHICO" and a search icon, and "Requisition ID:" with the value "NEXT". At the bottom of the form, there is a yellow "Add" button, which is highlighted with a red rectangular border.

- Click on 'Requisition Defaults' link.



The screenshot shows the "Maintain Requisitions" page. The "Requisition" header is visible, with fields for "Business Unit: CHCO", "Requisition ID: NEXT", "Status: Open", and "Budget Status: Not Chg'd". Below this, there are several tabs and links, including "Requester", "Requester Info", "Requester Defaults" (highlighted with a red box), and "Add Comments". The "Requester Defaults" link is highlighted with a red rectangular border. At the bottom of the page, there are buttons for "Save", "Notify", "Refresh", "Add", and "Update/Display".

Personalization of Entry Fields (cont.)

1. Supplier Search

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

Requisition Defaults

Business Unit CHICO Requisition Date 04/09/2018
Requisition ID NEXT Status Open

Default Options ?

Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer Unit of Measure
Supplier Supplier Location
Category **Supplier Lookup**

Schedule

Ship To *Distribute By

- On the **Supplier Search** page, click the Grid Action Menu button, then click the ‘Personalize’ link.

Supplier Search

Search Criteria

Name Short Name
Alternate Supp Name
City State
Country Postal
Class Type
Max Rows

Search Results

1-1 of 1

Supplier ID	Address	Location

Supplier Detail Address

Personalize
Zoom Search Results
Download Search Results Table to Excel

Personalization of Entry Fields (cont.)

- Click the 'Copy Settings' link.




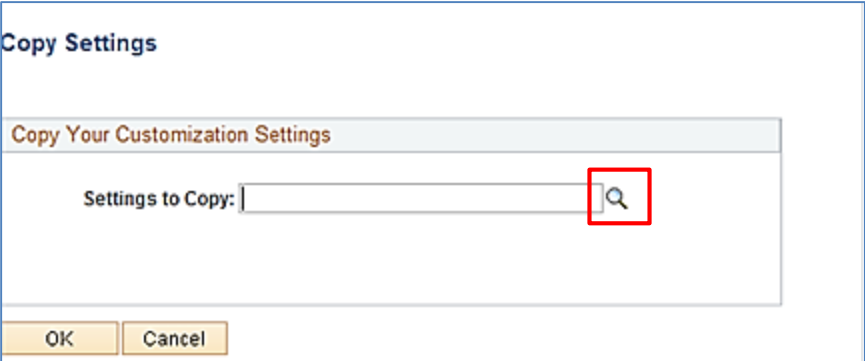
The screenshot shows a dialog box titled "Personalize Column and Sort Order". Below the title is a brief instruction: "To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab." The dialog is divided into two main sections: "Column Order" and "Sort Order".

The "Column Order" section contains a list of fields: Sel, Supplier ID, Location, Address, Short Supplier Name, Supplier Name, and Withholding Applicable. To the right of this list are several icons: a magnifying glass, a left arrow, a right arrow, a down arrow, and a checkbox labeled "Hidden". Below these icons is another checkbox labeled "Frozen".

The "Sort Order" section is an empty box. To its right are icons for ascending and descending sort orders, and a checkbox labeled "Descending".

At the bottom of the dialog are four buttons: "OK", "Cancel", "Preview", and "Copy Settings". The "Copy Settings" button is highlighted with a red rectangular box.

- Click the  icon next to the 'Settings to Copy' box.



The screenshot shows a dialog box titled "Copy Settings". Below the title is a section header "Copy Your Customization Settings". Underneath is a text input field labeled "Settings to Copy:". To the right of the input field is a magnifying glass icon, which is highlighted with a red rectangular box.

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Personalization of Entry Fields (cont.)

- Click the 'CHICO_REQ' link in the **Search Results** box.

The screenshot shows a dialog box titled "Look Up Settings to Copy" with a close button (X) in the top right corner. Below the title bar, there is a "Setting Name:" label followed by a dropdown menu set to "begins with" and an empty text input field. To the right of the input field is a "Help" link. Below this are three buttons: "Look Up", "Clear", and "Cancel". To the right of the "Cancel" button is the text "Basic Lookup". Below these buttons is a section titled "Search Results". Under "Search Results", there is a "View 100" label, a "First" button with a left arrow, "1 of 1", a "Last" button with a right arrow, and a list of results. The list has a header "Setting Name" and one entry, "CHICO_REQ", which is highlighted with a red rectangular box.

- Click 'OK' on the **Copy Settings** page.

The screenshot shows a dialog box titled "Copy Settings". Below the title bar is a section titled "Copy Your Customization Settings". Under this section is a text input field labeled "Settings to Copy:" containing the text "CHICO_REQ" and a search icon (magnifying glass) to its right. At the bottom of the dialog box are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular box.

- Click 'OK' on the **Personalize Column and Sort Order** page.

The screenshot shows a dialog box titled "Personalize Column and Sort Order". Below the title bar is a paragraph of instructions: "To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab." Below the instructions are two main sections: "Column Order" and "Sort Order". The "Column Order" section contains a list of column names: "Sel", "Supplier ID", "Location", "Address", "Short Supplier Name", "Supplier Name", and "Withholding Applicable". The "Supplier Name" entry is highlighted with a blue background. To the right of this list are two sets of up/down arrow buttons and two checkboxes labeled "Hidden" and "Frozen". The "Sort Order" section is an empty list box. To its right are up/down arrow buttons, a close button (X), and a checkbox labeled "Descending". At the bottom of the dialog box are four buttons: "OK", "Cancel", "Preview", and "Copy Settings". The "OK" button is highlighted with a red rectangular box.

Personalization of Entry Fields (cont.)

2. Requisition Defaults

- On **Requisition Defaults** page click the **Grid Action Menu** button, then click the 'Personalize' link.

Requisition Defaults

Business Unit: CHICO Requisition ID: NEXT Requisition Date: 11/21/2022 Status: Open

Default Options

Default: If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override: If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer: [] Unit of Measure: []
Supplier: [] Supplier Location: []
Category: [] Supplier Lookup: []

Schedule

Ship To: [] *Distribute By: Quantity []
Due Date: []
Ultimate Use Code: [] Ship Via: []
Attention To: [] Freight Terms: []

Distribution

SpeedChart: []

Distributions

Dept	Fund	Account	Program	Class	Project	Percent	Budget Date
[]	[]	[]	[]	[]	[]	[]	11/21/2022

Buttons: OK, Cancel, Refresh

- Click 'Copy Settings'.

Column Order


- Tab Details (frozen)
- Dist (frozen)
- Percent
- GL Unit
- Account
- Oper Unit
- Fund
- Dept
- Program
- Class
- Bud Ref
- Product
- Project
- Affiliate
- Fund Affil
- Oper Unit Affil
- Budget Date
- Location
- IN Unit
- Tab Asset Information
- Business Unit
- Profile ID
- Capitalize
- Cost Type
- Description

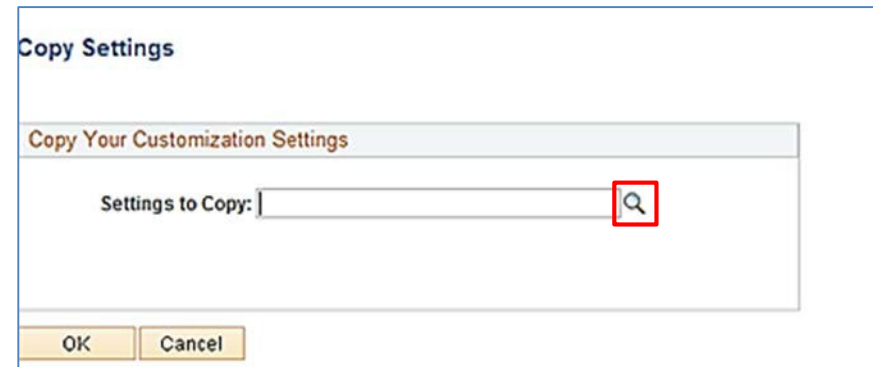
Sort Order

Hidden []
Frozen []
Descending []

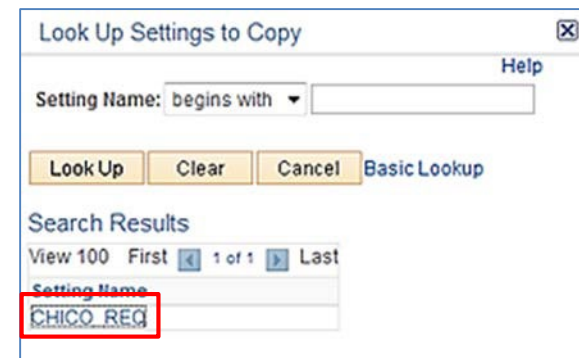
Buttons: OK, Cancel, Preview, Copy Settings

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.



The 'Copy Settings' dialog box is shown. It has a title bar with the text 'Copy Settings'. Below the title bar is a section titled 'Copy Your Customization Settings'. Inside this section is a text input field labeled 'Settings to Copy:'. A magnifying glass icon is located at the end of this input field, and it is highlighted with a red square. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.



The 'Look Up Settings to Copy' dialog box is shown. It has a title bar with the text 'Look Up Settings to Copy' and a close button. Below the title bar is a 'Setting Name:' label followed by a dropdown menu showing 'begins with' and an empty text input field. To the right of the input field is a 'Help' link. Below this are three buttons: 'Look Up', 'Clear', and 'Cancel'. To the right of the 'Cancel' button is the text 'Basic Lookup'. Below these buttons is a section titled 'Search Results'. Under 'Search Results' is the text 'View 100 First 1 of 1 Last'. Below this is a table with one row and one column. The column header is 'Setting Name' and the cell contains the text 'CHICO_REQ'. The 'CHICO_REQ' text is highlighted with a red square.



The 'Copy Settings' dialog box is shown again. It has a title bar with the text 'Copy Settings'. Below the title bar is a section titled 'Copy Your Customization Settings'. Inside this section is a text input field labeled 'Settings to Copy:'. The text 'CHICO_REQ' is entered into this field. A magnifying glass icon is located at the end of the input field. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red square.

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'.

Maintain Requisitions
Requisition

Business Unit CHICO Status Open
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name Copy From Hold From Further Processing

▼ Header ?
*Requester
*Requisition Date 11/21/2022 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 11/21/2022

Amount Summary ?
Total Amount 0.00 USD

Add Items From ?
Purchasing Kit Item Search Catalog Requester Items


Line ?

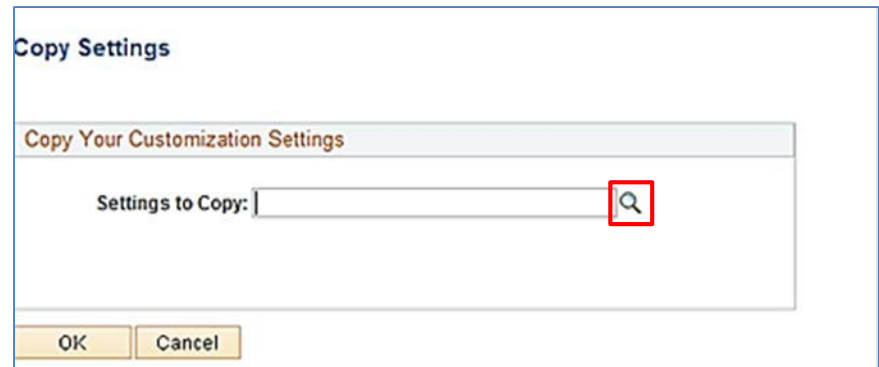
Description	Quantity	*UOM	Category
<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>

Category Line Number
Use Contract if Available
GPO ID
GPO Contract Number
Tab Sourcing Controls
Source Status
*Source Date
Calculate Price
Override Suggested Supplier
Consolidate with other Reqs
Sourcing Controls
% Unit Price Tolerance
% Unit Price Tolerance - Under
Unit Price Tolerance
Unit Price Tolerance - Under

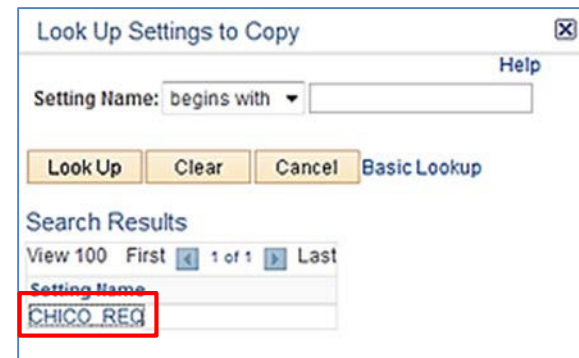
OK Cancel Preview **Copy Settings**

Personalization of Entry Fields (cont.)

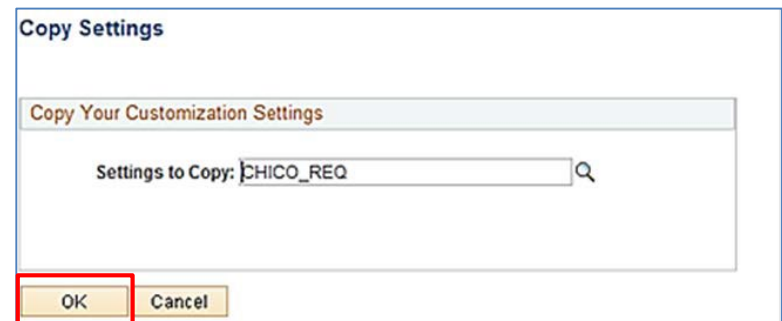
- Click the  icon next to the 'Settings to Copy' box.
- Click the 'CHICO_REQ' link in the **Search Results** box.
- Click 'OK' on the **Copy Settings** page.



The 'Copy Settings' dialog box is shown. It has a title bar 'Copy Settings' and a subtitle 'Copy Your Customization Settings'. Below the subtitle is a text input field labeled 'Settings to Copy:' with a magnifying glass icon to its right. At the bottom are 'OK' and 'Cancel' buttons.




The 'Look Up Settings to Copy' dialog box is shown. It has a title bar 'Look Up Settings to Copy' and a subtitle 'Basic Lookup'. Below the subtitle is a text input field labeled 'Setting Name:' with a dropdown menu set to 'begins with' and a magnifying glass icon to its right. Below the input field are 'Look Up', 'Clear', and 'Cancel' buttons. Below the buttons is a 'Search Results' section with 'View 100', 'First', '1 of 1', and 'Last' options. A table with one row is shown, with 'Setting Name' as the header and 'CHICO_REQ' as the value. At the bottom are 'OK' and 'Cancel' buttons.



The 'Copy Settings' dialog box is shown again. The 'Settings to Copy:' text input field now contains the text 'CHICO_REQ'. The 'OK' button at the bottom is highlighted with a red box.

Personalization of Entry Fields (cont.)

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.

Maintain Requisitions
Requisition

Business Unit CHICO
Requisition ID NEXT
Requisition Name Copy From

Status Open
Budget Status Not Child
Hold From Further Processing

*Requester
*Requisition Date 04/09/2014
Origin ONL
*Currency Code USD
Accounting Date 04/09/2014

Requester Info
Online Entry
Dollar

Requisition Defaults Add Comments
Requisition Activities

Amount Summary
Total Amount 0.00 USD

Add Items From
Purchasing Kit Catalog
Item Search Requirer Items

Line
Details Ship To Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls
Line Item Description Quantity UOM Category Price Merchandise Amount Status

1 Item Description Quantity 0.0000 UOM 'ea' Category Price 0 Merchandise Amount 0.00 Status Open

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

Save Notify Refresh

Maintain Requisitions
Schedule

Business Unit CHICO
Requisition ID NEXT
Requisition Date 11/21/2022
Status Open

Return to Main Page

Line
1 Item Description Quantity 0.0000 Each Merchandise Amt 0.00 USD

Schedule
Personalize
Zoom Schedule
Download Schedule Table to Excel

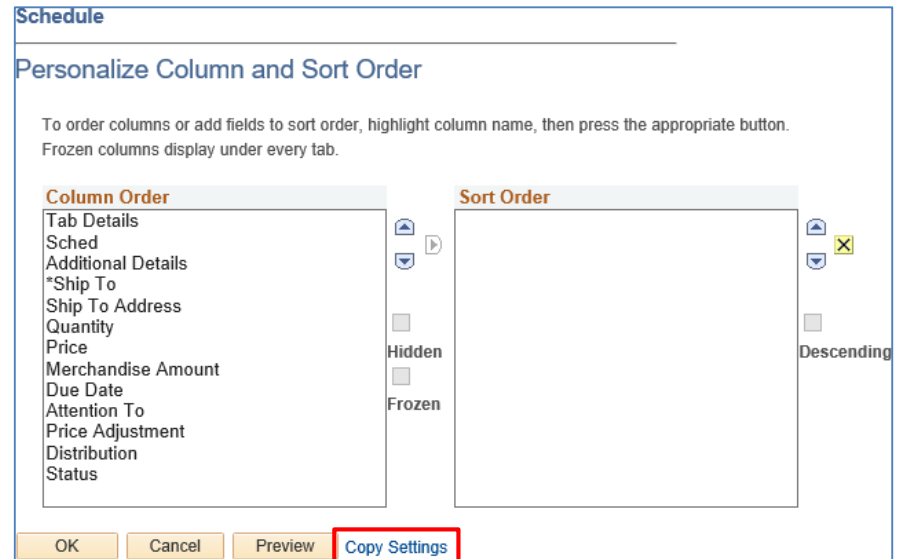
Quantity Price Merchandise Amount Due Date Status


0.0000 0.000000 0.00 Active

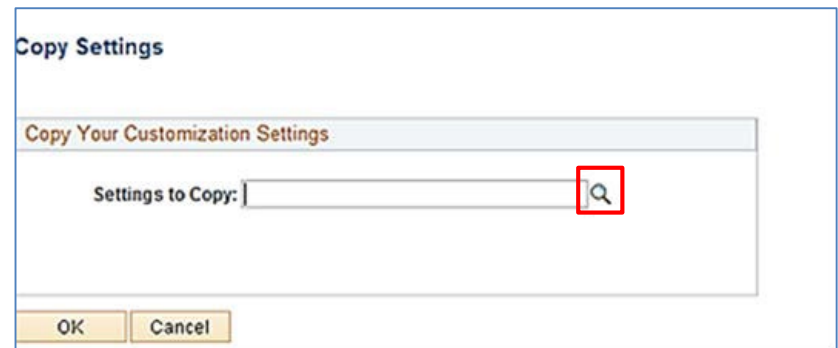
Add Ship To Comments

Personalization of Entry Fields (cont.)

- Click 'Copy Settings'.

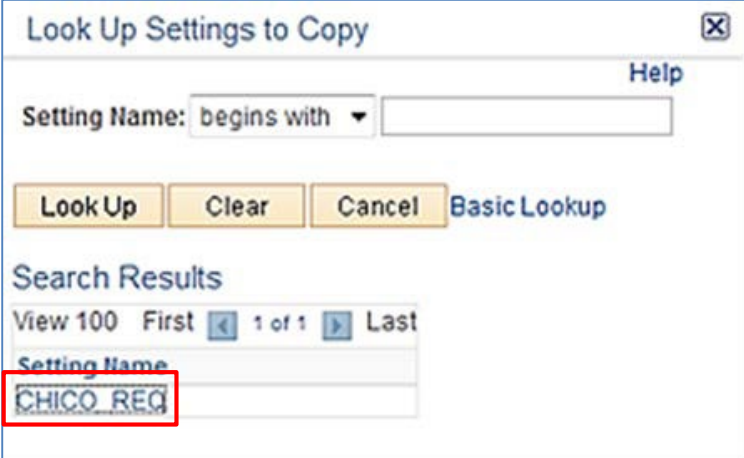


- Click the  icon next to the 'Settings to Copy' box.



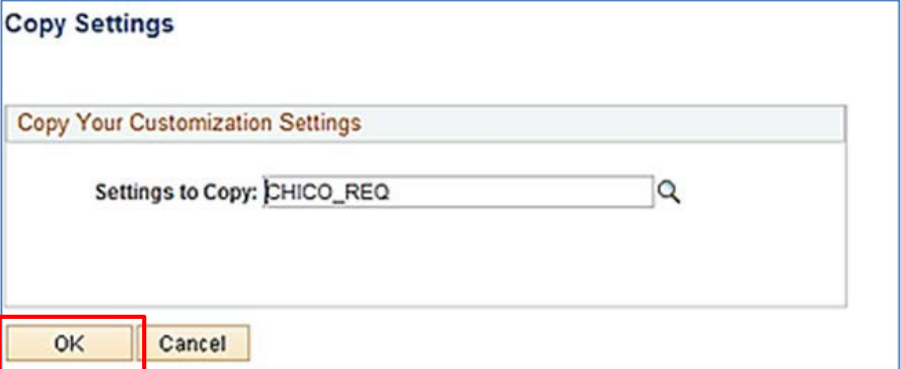
Personalization of Entry Fields (cont.)

- Click the 'CHICO_REQ' link in the **Search Results** box.



The screenshot shows a dialog box titled "Look Up Settings to Copy" with a close button (X) in the top right corner. Below the title bar is a "Help" link. The main area contains a "Setting Name:" label followed by a dropdown menu set to "begins with" and an empty text input field. Below this are three buttons: "Look Up", "Clear", and "Cancel", followed by the text "Basic Lookup". Underneath is a "Search Results" section with "View 100", "First", navigation arrows, "1 of 1", and "Last". A table with one row is visible, with the "Setting Name" column containing the text "CHICO_REQ", which is highlighted with a red rectangular box.


- Click 'OK' on the **Copy Settings** page.

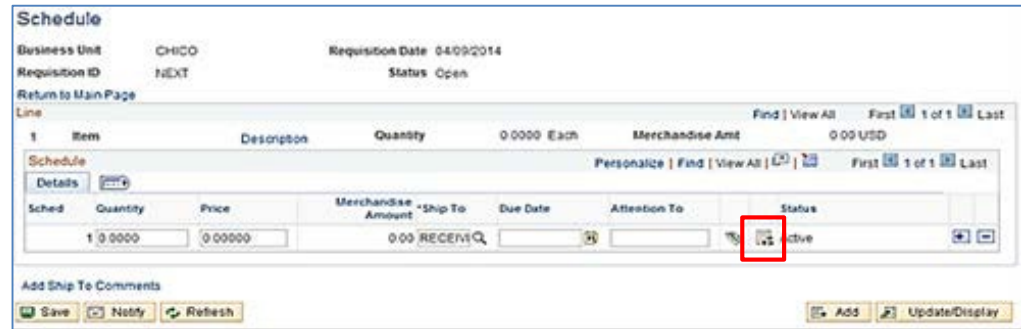


The screenshot shows a dialog box titled "Copy Settings". It features a header "Copy Your Customization Settings" above a search bar. The search bar contains the text "Settings to Copy: CHICO_REQ" and a magnifying glass icon. At the bottom of the dialog, there are two buttons: "OK" and "Cancel", with the "OK" button highlighted by a red rectangular box.

Personalization of Entry Fields (cont.)

5. Distribution

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



Schedule

Business Unit: CHICO Requisition Date: 04/09/2014
Requisition ID: NEXT Status: Open

Return to Main Page

Line	Item	Description	Quantity	0.0000 Each	Merchandise Amt	0.00 USD
1						

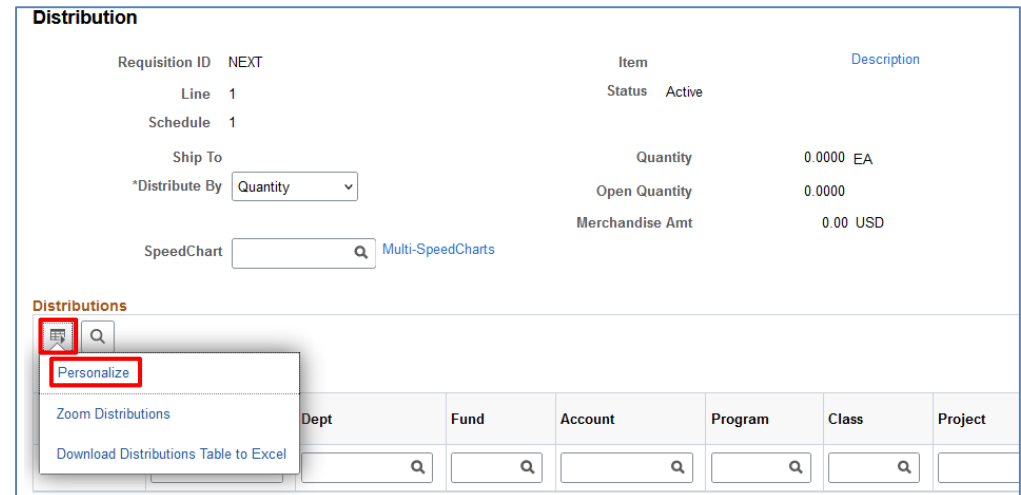
Schedule Details

Sched	Quantity	Price	Merchandise Amount	Ship To	Due Date	Attention To	Status
1	0.0000	0.00000	0.00	RECEIV			Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

- On the **Distribution** page, click the Grid Action Menu button, then click the 'Personalize' link.



Distribution

Requisition ID: NEXT Item: Description

Line: 1 Status: Active

Schedule: 1

Ship To: Quantity: 0.0000 EA

*Distribute By: Quantity Open Quantity: 0.0000

Merchandise Amt: 0.00 USD

SpeedChart: Multi-SpeedCharts

Distributions

Personalize

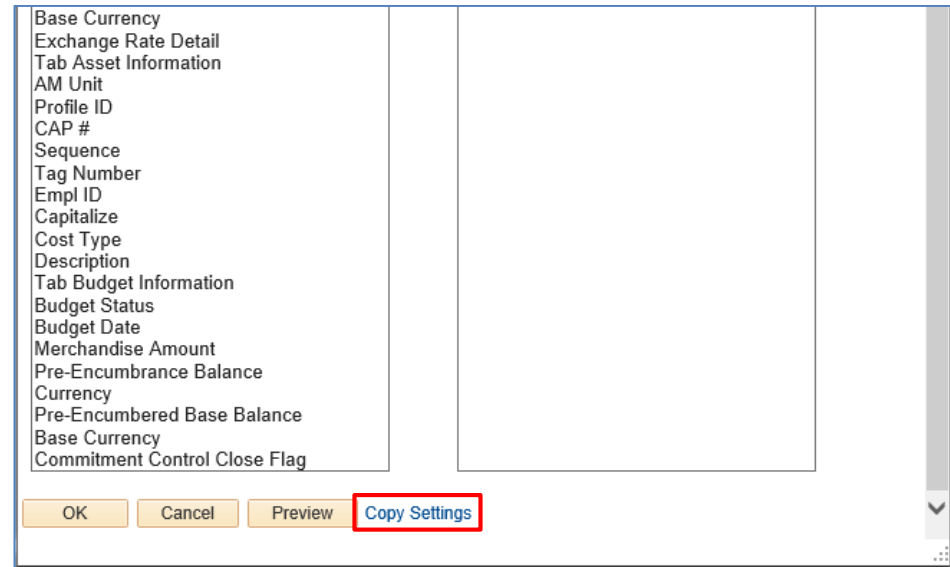
Zoom Distributions


Download Distributions Table to Excel

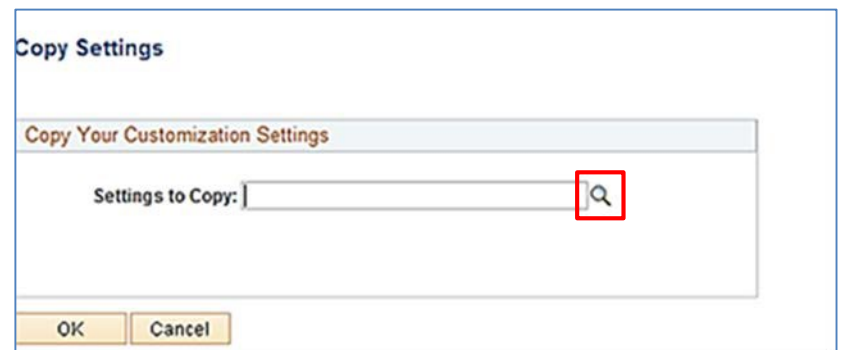
Dept	Fund	Account	Program	Class	Project

Personalization of Entry Fields (cont.)

- On the **Personalize Column and Sort Order** screen, scroll down and click on '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.

Look Up Settings to Copy ⓧ

Help

Setting Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1 of 1 Last

Setting Name
CHICO_REQ

- Click 'OK' on the **Copy Settings** page.

Copy Settings

Copy Your Customization Settings

Settings to Copy: CHICO_REQ

OK Cancel

Personalization of Entry Fields (cont.)

Distribution (cont.)

- Click 'Cancel' to close the Distribution page.

Distribution

Requisition ID: NEXT
Line: 1
Schedule: 1
Ship To: RECEIVING
*Distribute By: Quantity
SpeedChart: Multi-SpeedCharts

Item: [Empty]
Status: Active
Description: [Empty]

Quantity: 0.0000 EA
Open Quantity: 0.0000
Merchandise Amt: 0.00 USD

Distrib Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Product	Prop
1 Open		0.0000	0.00	CHCC								

OK Cancel Refresh

- One the **Schedule** page, click the 'Return to Main Page' link.

Schedule

Business Unit: CHICO
Requisition ID: NEXT
Requisition Date: 04/09/2014
Status: Open

[Return to Main Page](#)

Line	Item	Description	Quantity	0.0000 Each	Merchandise Amt
1					

Schedule

Sched	Quantity	Price	Merchandise Amount	Ship To	Due Date	Attention To
1	0.0000	0.00000	0.00	RECEIV		

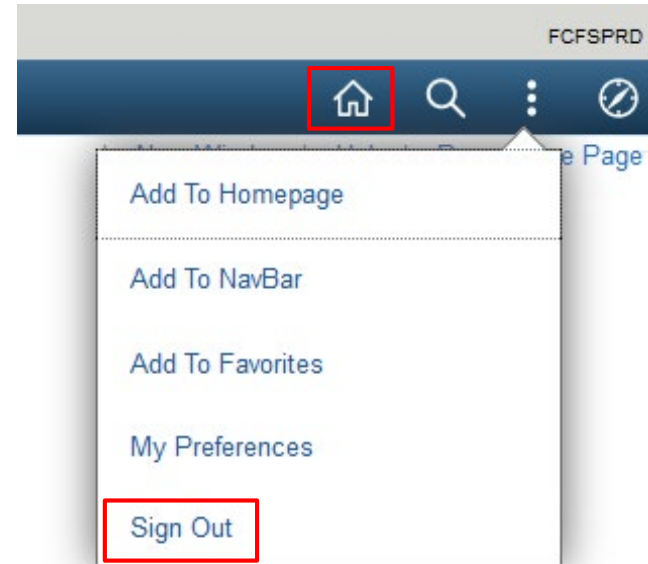
Add Ship To Comments

Save Notify Refresh

Personalization of Entry Fields (cont.)

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.)*

