

CFS **Common Financial System**


California State University, Chico

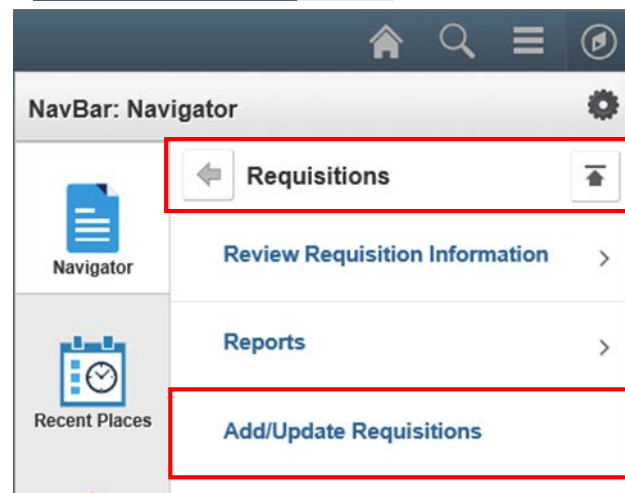
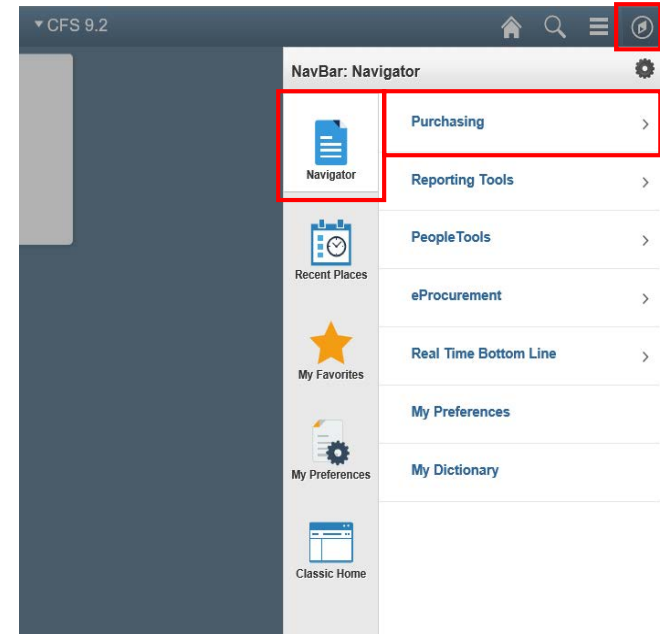
Requisition – Personalize My Entry Fields

Direct questions to Procurement & Contract Services, x5134

Personalization of Entry Fields

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

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



Personalization of Entry Fields (cont.)

- Click 'Add' to enter a new requisition.

Requisitions

Find an Existing Value

Add a New Value

Business Unit: CHICO

Requisition ID: NEXT

Add

- Click on 'Requisition Defaults' link.

Maintain Requisitions

Requisition

Business Unit: CHICO Status: Open Budget Status: Not Ch'd

Requisition ID: NEXT Requester Name: Copy From: Add From Further Processing

Requester: *Requisition Date: 3/4/2014 Requester Info: Origin: CHL Origin Entity: *Currency Code: Dollar Accounting Date: 3/4/2014

Requisition Defaults Add Comments Amount Summary: Total Amount: 0.00 USD

Add Items From: Purchasing Kit Catalog Requisition Name

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1			0			0	0.00	Open

View Printable Version *Go to: More

Save Notify Refresh Add Update/Display

Personalization of Entry Fields (cont.)

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

Requisition Defaults

Business Unit CHICO
Requisition ID NEXT

Requisition Date 04/09/2018
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 
Due Date  Ship Via 
Ultimate Use Code  Freight Terms 
Attention To

- On the **Supplier Search** page, click the 'Personalize' link.

Supplier Search

Search Criteria

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

Search

Search Results

Personalize | [Find](#) | [View All](#) | 

Sel	Supplier ID	Location	Address	Short Supplier Name	Supplier Name
<input type="checkbox"/>					

Personalization of Entry Fields (cont.)

- Click the 'Copy Settings' link.

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.


Column Order		Sort Order	
Sel			
Supplier ID			
Location			
Address			
Short Supplier Name	<input type="checkbox"/>		
Supplier Name	<input type="checkbox"/>		
Withholding Applicable			

OK Cancel Preview **Copy Settings**

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

Copy Settings

Copy Your Customization Settings

Settings to Copy: 

OK Cancel

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.

Look Up Settings to Copy ⓧ

Setting Name: begins with

[Basic Lookup](#)

Search Results

View 100 First 1 of 1 Last

Setting Name

CHICO_REQ

Copy Settings

Copy Your Customization Settings

Settings to Copy:

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order	Sort Order
Sel	
Supplier ID	
Location	
Address	
Short Supplier Name	
Supplier Name	
Withholding Applicable	

Hidden Frozen

Descending

[Copy Settings](#)

Personalization of Entry Fields (cont.)

Requisition Defaults

- Click the 'Personalize' link. (Scroll to the far right to find the link).

Requisition Defaults

Business Unit: DM00 Requisition Date: 10/19/2014
Requisition ID: A217 Status: Open

Default Values
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 and, non-zero values are assigned.

Line
Buyer: _____ End of Measure: _____
Supplier: _____ Supplier Location: _____
Category: _____ Supplier Internal: _____

Schedule
Ship To: _____ *Distribution By: Quantity
Buy Date: _____
Warehouse Code: _____ Attention To: _____

Distribution
Special Char: _____

Distributions
Details | [Personalize](#) | [Print](#) | [Print Full](#)

Dist	Account	GL Unit	Account	Oper Unit	Fund	Bud Ref	Product	Class	Bud Ref	Product	IN	Subject Line	Location	Expense	Cost Type	Description
1	DM00															

OK Cancel Refresh

- Click 'Copy Settings'.

Grid Customization [Help](#)

Distributions

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

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

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.

Copy Settings

Copy Your Customization Settings

Settings to Copy:

OK Cancel

Look Up Settings to Copy ⓧ

Setting Name: begins with Help

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1 of 1 Last

Setting Name
CHICO_REQ

Copy Settings

Copy Your Customization Settings

Settings to Copy: CHICO_REQ

OK Cancel

Personalization of Entry Fields (cont.)

Lines

- On the **Maintain Requisitions** page, click on the 'Personalize' link on **Lines**.

Maintain Requisitions
Requisition

Business Unit: CHCO
Requisition ID: NEXT
Requisition Name: [] Copy From

Status: Open
Budget Status: Not Chkd
 Hold From Further Processing

Header

*Requester: []
*Requisition Date: 04/09/2014
Origin: ORL
*Currency Code: USD
Accounting Date: 04/09/2014

Requester Info
Online Entry
Dollar

Requestion Defaults
Add Comments
Add Comments
Requestion Atributes

Amount Summary

Total Amount: 0.00 USD

Add Items From

Purchasing Kit
Item Search
Catalog
Requester Items

Line

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | **Personalize** | Find | View All | [] | []

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

View Printable Version
*Go to: More...


Save | Notify | Refresh

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

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.

Copy Settings

Copy Your Customization Settings

Settings to Copy: 



OK Cancel

Look Up Settings to Copy 

Setting Name: begins with [Help](#)

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First  1 of 1  Last

Setting Name
CHICO_REQ

Copy Settings


Copy Your Customization Settings

Settings to Copy: CHICO_REQ 

OK Cancel

Personalization of Entry Fields (cont.)

Schedules

- To open the 'Schedule' the **UOM** field must have a value. Enter 'ea' in the UOM field.
- Click the  **Schedules** icon at the end of the Lines section.
- On the **Schedule** page, click the 'Personalize' link.

Maintain Requisitions

Requisition

Business Unit CHCO Status Open
Requisition ID NEXT Budget Status Not Child
Requisition Name _____ Copy From Hold From Further Processing

Header

*Requester _____
*Requisition Date 04/09/2014 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 04/09/2014

Requisition Defaults Add Comments Amount Summary
Requisition Activities Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1			0.0000	EA		0	0.00	Open

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

Save Notify Refresh

Schedule

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

Return to Main Page

Line	Item	Description	Quantity	UOM	Merchandise Amt	Status
1			0.0000	Each	0.00 USD	Open

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

Personalization of Entry Fields (cont.)

- Click 'Copy Settings'.

Schedule

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Details
- Sched
- Additional Details
- *Ship To
- Ship To Address
- Quantity
- Price
- Merchandise Amount
- Due Date
- Attention To
- Price Adjustment
- Distribution
- Status


Sort Order

Hidden

Frozen

Descending

OK Cancel Preview **Copy Settings**

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

Copy Settings

Copy Your Customization Settings

Settings to Copy: 

OK Cancel

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

- On the **Schedule** page, click the  Distribution icon.
- On the **Distribution** page, click the 'Personalize' link. *(Scroll to the far right to find the link).*

Schedule

Business Unit: CHCO 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
Schedule Personalize Find View All First 1 of 1 Last								
Details Personalize Find View All First 1 of 1 Last								
Sched	Quantity	Price	Merchandise Amount	Ship To	Due Date	Attention To	Status	
1	0.0000	0.00000	0.00	RECEIVING			Active	

Add Ship To Comments

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Distribution

Requisition ID: NEXT Item Status: Active

Line: 1 Schedule: 1

Ship To: RECEIVING Quantity: 0.0000 EA

Distribute By: Quantity Open Quantity: 0.0000

Merchandise Amt: 0.00 USD

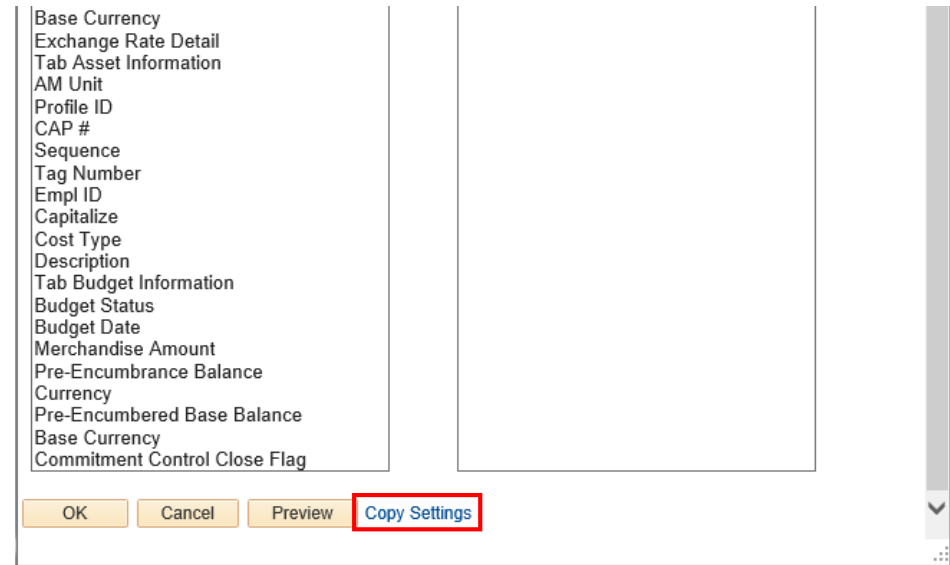
SpeedChart: [Multi-SpeedCharts](#)


Distributions Personalize Find View All													
Chart/Fields	Details	Asset Information	Budget Information										
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Product	Propri
1	Open		0.0000	0.00	CHCO								

[OK](#) [Cancel](#) [Refresh](#)

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.

Copy Settings



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 RECEIVING
*Distribute By: Quantity
SpeedChart: Multi-SpeedChart

Item Status: Active
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	Project
1 Open		0.0000	0.00	CHCO								

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 RECEIVING		

Add Ship To Comments

Save Notify Refresh

Personalization of Entry Fields (cont.)

Finish

After all 5 areas have been customized, close the **Maintain Requisitions** page:

- Click 'Add/Update Requisitions' on the Menu to add a Requisition.

OR

- Click the 'Sign out' in the upper right corner of the page to exit PeopleSoft.
- *If the 'Save Warning' message pops up, click the 'Cancel' box. (Customizations will be saved.)*

The screenshot shows the Oracle PeopleSoft interface for 'Add/Update Requisitions'. The breadcrumb trail is 'Main Menu > Purchasing > Requisitions > Add/Update Requisitions'. The 'Sign out' button is in the top right corner. The main form area is titled 'Maintain Requisitions' and contains a 'Requisition' header with the following fields: Business Unit (OHCO), Requisition ID (1EXT), Requisition Name (with a 'Copy From' button), Requester, Requestion Date (24/09/2018), Origin (OFL), Currency Code (USD), and Accounting Date (24/09/2018). The status is 'Open' and the budget status is 'Not Chrg'. There is also a checkbox for 'Hold from Further Processing'.

The 'Save Warning' dialog box has a title bar with a close button (X). The main text reads: 'You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.' Below the text are two buttons: 'OK' and 'Cancel'. The 'Cancel' button is highlighted with a red box.