

Enter a Requisition

This guide explains how to create a requisition in PeopleSoft Common Financial System (CFS).

Getting there	Main Menu > Purchasing > Requisition > Add/Update Requisitions On the Add a New Value tab click Add.
Requisition Name	1. Requisition Name of your choice that will help identify the requisition contents. Optional <i>Copy From</i> will replicate a previous requisition; review for accuracy.
Requisition Header Section	2. Requester will self-populate. 3. Requisition Date defaults to today's date. 4. Origin (ONL) do not change. 5. Accounting Date defaults to today's date; do not change unless instructed otherwise. 6. Add Comments – enter information for the buyer to know when creating the PO: - Delivery requirements, special instructions. - Supplier information if known: supplier name, address, email, phone, extension number and contact person. Suppliers > Supplier Information > Add/Update > Review Suppliers to look up supplier
Add Comments	7. Click all options <input type="checkbox"/> Send to Supplier – supplier will see the comment on the PO <input type="checkbox"/> Show at Voucher – only accounting tech will see the comment <input type="checkbox"/> Show at Receipt – only receiving will see the comment
Add Attachments	8. Attachments – required documentation and supporting information i.e. 204, quote etc.

Maintain Requisitions

Requisition

Business Unit SMCMP
 Requisition ID 0000017329
 Requisition Name Surf Science - Surf Boards **Copy From**

Status Open **18**
 Budget Status Not Chk'd **19** Hold From Further Processing

1 Header ?

2 *Requester 68100269392 Miller, Karleen
3 *Requisition Date 09/24/2019 Requisition Info
4 Origin ONL Online
 *Currency Code USD Dollar
5 Accounting Date 09/24/2019

Requisition Defaults Add Comments
 Requisition Activities **6**
 Document Status

Amount Summary ?
 Total Amount 500.00 USD

Copy From is optional shortcut for repeat purchases

* NOTE – One document per comment; please name the document. Click " + " to add more than one.

Comments Find | View All First 1 of 1 Last
 Use Standard Comments Comment Status Active Inactivate

SurfIn U.S.A
 123 Boardwalk Way, Malibu, CA 92111
 Contact: Kelly
 kellys@gmail.com

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document
 Attachment Surf_Board_Quote.pdf **8** Attach View Delete Email


From -> REQ SMCMP-NEXT

Click Attach and OK

OK Cancel Refresh

Line Information Section

***15. NOTE** – Never enter anything into "Item" field.

9. Description - enter the description of the goods or services. Part/Item/Product Number i.e. Part Number: XCO Monitor. If the line description is longer than the field permits click the display button.  To indicate taxable or non-taxable add at the end of the description line.

10. Quantity – Quantity 1 is preferred.

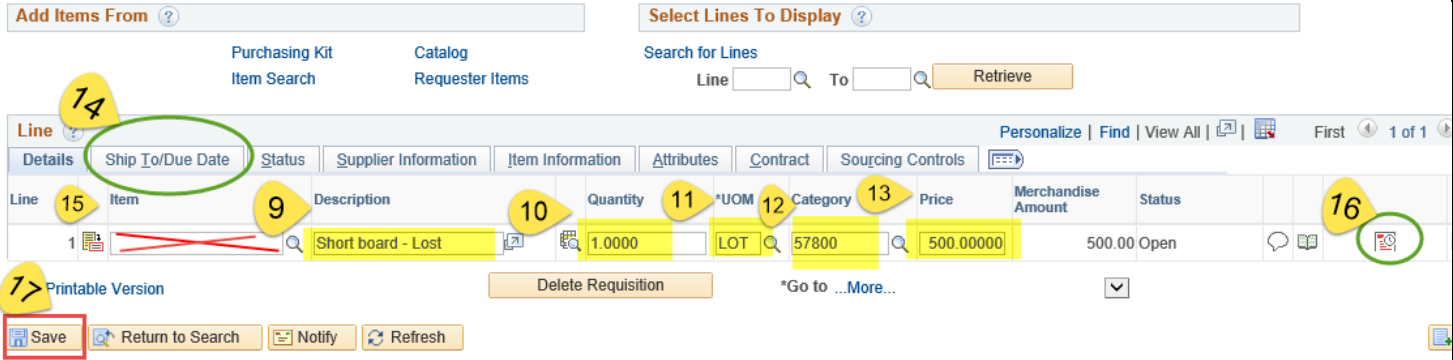
11. Unit of Measure (UOM) – Lot is preferred.

12. Category – choose option that most closely matches the purchase.



13. Price (per unit/lot) - sales tax will be added to the purchase order as noted in the description. If there is freight, add it as a separate line. The category code for freight should be the same as the item.


14. Ship To/Due Date tab - date you would like the good delivered or the services completed i.e. last day of the service contract. If there is an extended service time enter the date you expect the service to expire/end.

Ship To – the default is Receiving.



Enter Chartfield


16. Schedule -  click  to split the distribution. Add row/s and split by amount or quantity.

Distribution Information -  enter chartfield.

17. Click OK and Save and a requisition # will be assigned.

Requisition Page/General Section

18. Approve the requisition, select status will change to Approved

19. Budget check the requisition, select  (Important!) will change to Valid.
If applicable, email a copy of the supporting documents and requisition to procurementservices@csusm.edu. Reference the requisition # in the subject line.

Print A Requisition

A new run control ID maybe needed.

Go to Process Monitor. When it says Success and Posted select "Details." Click View Log/Trace and print the PDF version.

Main Menu > Purchasing > Requisitions > Reports > Print Requisition