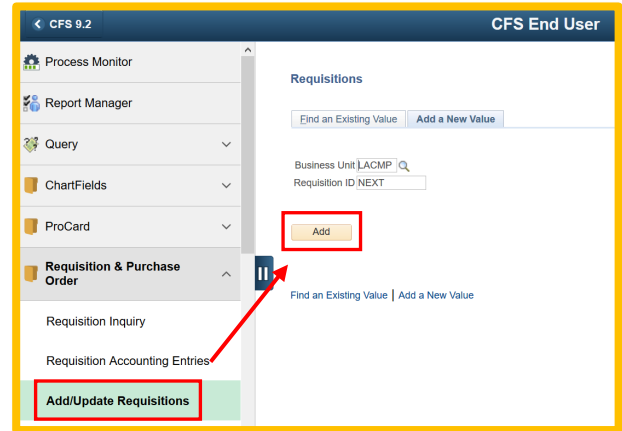


Enter a Requisition



Click on either the Purchasing or CFS End User navigation tile and navigate to Add/Update Requisition.



1. Click on 'Add'.

Maintain Requisitions page

The screenshot shows the 'Maintain Requisitions' page. At the top, it displays 'Business Unit LACMP', 'Requisition ID NEXT', 'Status Open', and 'Budget Status Not Chk'd'. Below this is a 'Header' section with fields for 'Requester' (Cortez,Susan), 'Requisition Date' (04/29/2019), 'Origin' (ONL), and 'Currency Code' (USD). A red box labeled '6' highlights the 'Accounting Date' field (04/29/2019). To the right, there is an 'Add Comments' button labeled '2'. Below the header is an 'Amount Summary' section showing 'Total Amount 0.00 USD'. At the bottom, there is a 'Line' table with columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. A red box labeled '3' highlights the 'Description' column, '4' highlights the 'Quantity' column, and '5' highlights the 'Price' column. The table contains one row with '1' in the Line column, '0.0000' in the Quantity column, and '0.00' in the Price column.

2. Click on **Add Comments**

Add Comments page

The screenshot shows the 'Add Comments' page. It displays 'Business Unit LACMP', 'Requisition ID NEXT', 'Requisition Date 04/29/2019', and 'Status Open'. Below this are dropdown menus for '*Sort Method' (Comment Time Stamp) and '*Sort Sequence' (Ascending), with a 'Sort' button. A 'Comments' section has a 'Use Standard Comments' link, 'Comment Status Active', and an 'Inactivate' button. A red box highlights the comment text: 'UNIVERSITY USE ONLY: Department Name, Requester Name, and Extension Chartfield (6XXXXX - Fund - Deptid - Prog/Proj (optional))'. Below the text are checkboxes for 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Associated Document' section has an 'Attachment' field, 'Attach', 'View', and 'Delete' buttons, and an 'Email' checkbox. At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons. A red arrow points from the 'OK' button to the comment text.

Add Comments - Begin your comments with:

UNIVERSITY USE ONLY:

Department Name, Requestor Name and Ext.

Chartfield ex. 6XXXXX-SF001-5XXXXX

Other information you can add: Preferred Vendor ABC (include contact, address and phone) or special shipping instructions

Click on the button.

NOTE: When you have a quote or any other document you need to send to Purchasing, you can attach the file on this page. Click on the 'Attach' button to upload your document, then click on the button to return to the **Maintain Requisitions** page.



3. **Description:** enter the line item starting with the item name followed by the description. Include a catalog reference or part number, if applicable. Types of entry:

- | | |
|---------------------------|---------------------------------------------------|
| Commodity entry | Item, Description |
| Service/Open Orders entry | Service/Open Order - ... |
| Additional Funds | PO# 2020XXXXX – additional funds |
| Freight & Handling | Enter a line for all freight and handling charges |

If your order has multiple items, click on on the right-hand side of the line to add row(s). Do not enter more than 25 lines per requisition.

4. **Quantity:** enter quantity. Service or open orders enter a quantity of '1'.

5. **Price:** enter the price per item

6. **Requisition Defaults** (located to the left of the Add Comments link)

Requisition Defaults

Business Unit LACMP Requisition Date 04/29/2019
 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.

7 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

8 Buyer [] **10** Unit of Measure EA []
 Supplier 0000073014 [] IRG PLOTTERS & PRINTERS, Supplier Location 0001 []
 INC. Supplier Lookup
 Category 20401 **9** []

Schedule

11 Ship To RECEIVING [] Ship to Address: **13** *Distribute By Quantity [v]
 Due Date [] **12** *Liquidate By Quantity [v]
 Ultimate Use Code [] Ship Via UPSAIR []
 Attention To [] Freight Terms FOB []

Distribution

SpeedChart []

Distributions

Details Asset Information []

Dist	GL Unit	Location	Dept	14 Fund	Program	Account	Oper Unit	Percent	Class
1	LACMP []	RECEIVING []	500200 []	SF001 []	[]	[]	[]	[]	[]

15 OK Cancel Refresh

7. **Override:** click on the radio button

8. **Supplier:** enter if you have a preferred vendor. Click on to look up the supplier id.

9. **Category:** Click on to view a list of choices. (Catering 96115, Freight FRT)

10. **Unit of Measure:** EA = commodity items LOT = Service or open orders

11. **Ship To:** Items = RECEIVING Open and Service = NOTAX

12. **Due Date:** if a rush order enter the due date

13. ***Distribute by/*Liquidate by:** Items = Quantity Blanket and Service = Amount

14. **Financial Chartfield:** enter your Deptid/Fund/Program (opt) – leave Account blank, it will auto-populate based on the Category code chosen.

15. Click on the button, the following page will display:

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit LACMP

Requisition Date 04/29/2019

Requisition ID NEXT

Status Open

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.

For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.

Select 'Apply to All Distributions' to apply changes to all distribution lines on the requisition.



Mark All



Unmark All

Retrofit Field Selection				
Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Supplier	0000073014	
<input checked="" type="checkbox"/>		Category	20401	
<input checked="" type="checkbox"/>		Unit of Measure	EA	
<input checked="" type="checkbox"/>		Supplier Location	0001	
<input checked="" type="checkbox"/>		Ship To	RECEIVING	
<input checked="" type="checkbox"/>		Ship Via	UPS AIR	
<input checked="" type="checkbox"/>		Freight Terms	FOB	

OK

Cancel

Refresh

16. Click on **Mark All** to check all the boxes and to return to the main page.

NOTE: You can return to Requisition Defaults at any time if you add additional lines later or need to change one of these values.

Maintain Requisitions page

Maintain Requisitions

Requisition

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

▼ Header ?

*Requester 4520249/054 Cortez, Susan
*Requisition Date 04/29/2019 Requirer Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 04/29/2019

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 1,250.00 USD

Add Items From ?



Purchasing Kit Catalog
Item Search Requirer Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Computer - HP Laptop	1.0000	EA	20401	1,250.0000	1,250.00	Open

View Print 18 Refresh

NOTE: If you have items that are a different category, UOM or charfield; change the row after you finish your requisition defaults.

17.  **Line Comments:** additional information relevant to that line that is not noted in the Description field such as size/color. If you have \$0 items, enter the information here. For quotes, enter your quote number here on the last row of your order.
18. Click on the  button at the bottom of the page. If any required fields are missing, you will receive a warning, update the field and save again. Once the save is complete, the Requisition ID field will change from 'NEXT' to the assigned requisition number, make note of this number. Contact your approver to approve the requisition.

Copy a Requisition

To save time, you can copy a previously entered requisition, make the necessary updates for that order and save. Once saved, a new requisition number will generate.

Requisitions

Find an Existing Value | Add a New Value

Business Unit LACMP

Requisition ID NEXT

Add

Find an Existing Value | Add a New Value

On the Add/Update Requisitions page, click on **Add**.

On the Maintain Requisitions page, click on the 'Copy From' link.

Maintain Requisitions

Requisition

Business Unit LACMP

Requisition ID NEXT

Requisition Name

Copy From

Maintain Requisitions

Copy Requisition

Header

Business Unit LACMP

Requisition ID 00000XXXXX

Requisition Name

Req Status

Requester 45

Requester Name

Requisition Date

Supplier SetID LACMP

Supplier ID

Item SetID LACMP

Item Description

Department

Origin

To

Supplier Name

Item ID

Direct Ship


254 characters remaining

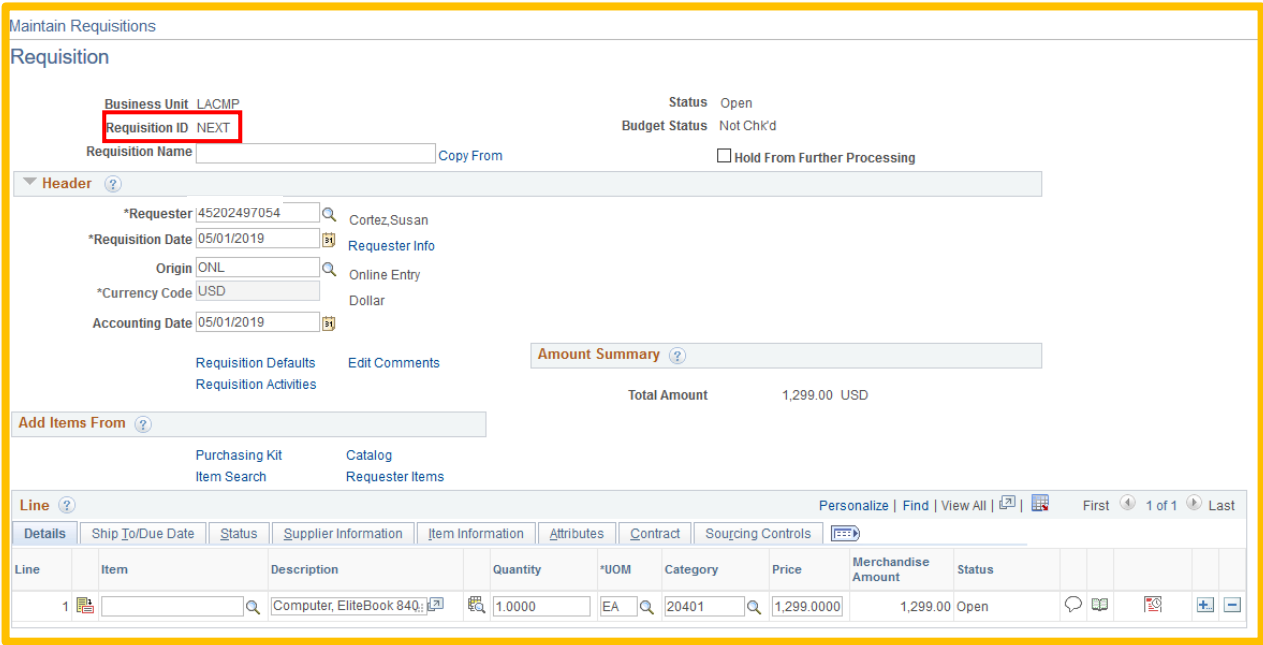
Search

Search by entering the requisition ID you want to copy **OR** by searching your requisitions by entered 45 + your emplid into the Requester field. Click on **Search**, matching requisition(s) will display below.

Sel	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	0000035402	0000035402	Complete	ONL	45202497054
<input type="checkbox"/>	0000034130	0000034130	Complete	ONL	45202497054
<input type="checkbox"/>	0000031266	0000031266	Complete	ONL	45202497054

OK Cancel Refresh

Using the search by Requester, 61 requisitions are found. You can click on the Req ID link for each one to see review that requisition. When you search by Requisition ID, only that requisition will appear. Once you find the requisition you want to copy, click on the 'Sel' checkbox and click on  .



Maintain Requisitions

Requisition

Business Unit LACMP
Requisition ID NEXT

Status Open
Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

Header

*Requester 45202497054 Cortez, Susan
*Requisition Date 05/01/2019 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 05/01/2019

Requisition Defaults Edit Comments
Requisition Activities

Amount Summary

Total Amount 1,299.00 USD


Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line

Personalize | Find | View All | First 1 of 1 Last

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		Computer, EliteBook 840	1.0000	EA	20401	1,299.0000	1,299.00	Open					

Requisition ID must show 'NEXT', you can make updates to the requisition for your new purchase. Once you are done, click on  and a new Requisition number will update in the Requisition ID field, make note of this number. Contact your approver to approve the requisition.