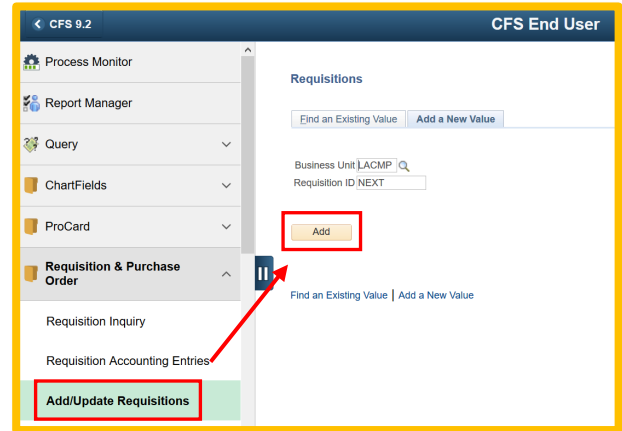CAL STATE LA | FINANCIAL OPERATIONS PLANNING

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

2. Click on **Add Comments**

Add Comments page

<u>**Add Comments**</u> - 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 [OK] 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 [OK] button to return to the **Maintain Requisitions** page.

Associated Document				
Attachment	Attach	View	Delete	☐ Email

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.

◉ Override [7]   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 [   ] 🔍   [10] Unit of Measure [EA] 🔍
[8] Supplier [0000073014] 🔍 IRG PLOTTERS & PRINTERS,   Supplier Location [0001] 🔍
                                INC.
Category [20401 [9]   ] 🔍   Supplier Lookup

Schedule

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

Distribution

SpeedChart [   ] 🔍

Distributions

| Details | Asset Information | 📇 |

Dist	GL Unit	Location	Dept	und	Program	Account	Oper Unit	Percent	Class
1	LACMF🔍	RECEIVING 🔍	500200 [14] 🔍	SF001🔍	[ ]🔍	[ ]🔍	[ ]🔍	[ ]🔍	[ ]🔍

| OK [15] | el | 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 [OK] 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.

16 ~~nple~~: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
~~Select~~ 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.

☑ Mark All   ☐ Unmark All

Retrofit Field Selection   Personalize | Find | View All | 🔗 | 📊   First ◄ 1-7 of 12 ► Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
☑		Supplier	0000073014	
☑		Category	20401	
☑		Unit of Measure	EA	
☑		Supplier Location	0001	
☑		Ship To	RECEIVING	
☑		Ship Via	UPSAIR	
☑		Freight Terms	FOB	

[OK]   [Cancel]   [Refresh]

16. Click on **Mark All** to check all the boxes and [OK] 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

NOTE: If you have items that are a different category, UOM or chartfield; 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 🖫Save 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 00000XXXXXX
Requisition Name [   ]
Req Status [   ]   Origin [   ]
Requester 45
Requester Name [   ]
Requisition Date [   ]   To [   ]
Supplier SetID LACMP   Supplier Lookup
Supplier ID [   ] Supplier Details   Supplier Name [   ]
Item SetID LACMP   Item ID [   ]
Item Description [   ]   ☐ Direct Ship
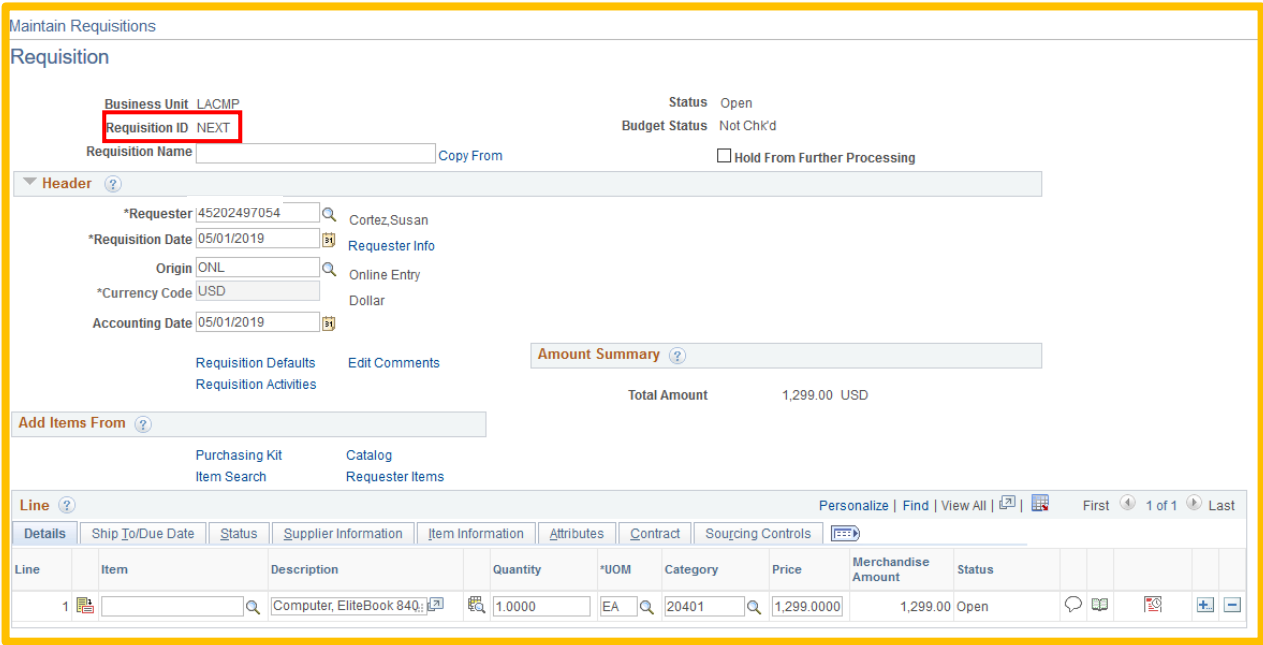254 characters remaining
Department [   ]

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.

Requisition   Personalize | Find | View All | 🗗 | 📊   First ◀ 1-3 of 61 ▶ Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
☑	0000035402	0000035402	Complete	ONL	45202497054
☐	0000034130	0000034130	Complete	ONL	45202497054
☐	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 [OK] .

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