









Enter a Requisition

A Requisition is a request for goods or services for use by your department. The requestor’s supervisor or department head usually approves requisitions before they are forwarded to the Purchasing department. The Purchasing department uses requisitions to create purchase orders, supplier contracts, or requests for quote.

A Requisition is made up of four main pieces of information: header, line, schedule, and distribution information. These pieces are found in the Online Maintain Requisitions Page.

Getting there	Purchasing ► Requisition ► Add/Update Requisitions ► Select Business Unit – Add a New Value
Requisitions	1. Put requisition on hold.
Requisitions/ Header Section	1. Confirm that the Requester and the Requestor Info Link has your correct phone number 2. Click on the Requisition Defaults Link.
Requisitions/ Requisition Defaults Link	1. Select Override. 2. Enter the Supplier ID. Click  or open a new window and use the Review Supplier function (Suppliers ► Supplier Info ► Add/Update Suppliers ► Review Suppliers). 3. Enter Category, UOM and Due date if the same for the entire Requisition. 4. Enter the Chartfield distribution. Click OK to go back to the Maintain Requisitions Page.
Requisitions Page/Header - Add Comments Link	1. Click the Add Comments Link. 2. Specify where you want the Materials Management (Receiving) department to deliver the goods. Select Shown at Receipt. Click ok to go back to the Maintain Requisitions Page. 3. Insert another comment if you did not enter a supplier on the Requisition Defaults link. Enter the Suplrier information; name, address, phone number, and a contact in the header comments.
Requisitions/Line	1. Enter the Item Description, Quantity, UOM, Category, Price, and Due Date. 2. Click  to view the requisition-line-item long description. 3. To add lines click the  at the end. 4. Click the Schedule icon  to go to the Schedule Page.
Schedule Page/Schedule	1. Click the Distribution icon  to enter accounting information.
Distribution Page/Distribution	1. Enter Account (defaults from Category, do not change), Fund, DeptID (defaults), Program (optional), Class (optional) and Project (optional). Remember a distribution must be entered for each line. Only do this if you did not specify these on the Requisition Defaults page. 2. To add additional distribution lines click the  at the end. 3. Click OK then click Return to Main Page. 4. Click Save. A Requisition ID is assigned.
Requisition Page/General Info.	1. Take requisition off hold. Click Save. 2. Select  to Approve the Requisition. 3. Select  to Budget Check the Requisition. 4. If applicable email a copy of the quote to procurementservices@csusm.edu . Reference the Requisition # in the Subject line.

Navigation Path

- Requisitions
 - Reconcile Requisitions
 - Review Requisition Information
 - Reports
 - Add/Update Requisitions**
 - Approve Amounts
 - Stage For Loading
 - Load Requisitions
 - Update Direct Shipments
 - Budget Check
 - Entry Event Request
 - Purge Load Requests

Add a Requisition – Requisition page

Maintain Requisitions
Requisition

Business Unit SMCMP
Requisition ID NEXT
 Requisition Name _____ Copy From _____

Status Open
 Budget Status Not Chkd
 Hold From Further Processing

*Requester 68000046732 Taylor,David
 *Requisition Date 02/21/2014 Requirer info
 Origin ONL Online
 *Currency Code USD Dollar
 Accounting Date 02/21/2014

Requisition Defaults Add Comments
Requisition Activities

Amount Summary
Total Amount 0.00 USD

Add Items From _____
 Purchasing Kit Catalog
 Item Search Requirer Items

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Due Date	Ship To	Zero Price Indicator	Amount Only
1		0.0000			0	0.00		RECEIV		

View Printable Version *Go to ...More...
 Save Notify Refresh Add Update/Display

Add Comments

Header Comments

Business Unit SMCMP Requisition Date 02/20/2014
 Requisition ID 0000010035 Status Open

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments
 Use Standard Comments Comment Status Active Inactivate

Enter Relevant Information

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document
 Attachment Attach View Delete Email

From -> REQ SMCMP-0000010035
 OK Cancel Refresh

Add Attachment

Header Comments

Business Unit SMCMP Requisition Date 02/20/2014
 Requisition ID 0000010035 Status Open

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments
 Use Standard Comments Comment Status Active Inactivate

File Attachment Help
 Enter Relevant Information
 Browse...
 Upload Cancel

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document
 Attachment Attach View Delete Email

From -> REQ SMCMP-0000010035
 OK Cancel Refresh

Schedule

Schedule

Business Unit SMCMP Requisition Date 02/20/2014
 Requisition ID 0000010035 Status Open

Return to Main Page

Line	Item	Widgets	Quantity	Price	Merchandise Amt	Due Date	Attention To	Status
1			29.0000	50.00000	1,450.00	02/20/2014	Taylor,David	Active

Add Ship To Comments
 Save Notify Refresh Add Update/Display

Distributions

Distribution

Requisition ID 0000010035
 Line 1
 Schedule 1
 Ship To RECEIVING Receiving
 *Distribute By Quantity
 *Liquidate By Quantity
 SpeedChart Multi-SpeedCharts

Item Status Active
 Quantity 29.0000 EA
 Open Quantity 29.0000
 Merchandise Amt 1,450.00 USD

Distributions
 Chartfields Details Asset Information Budget Information

Distrib Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Product	Project
1 Open	100.0000	29.0000	1,450.00	SMCM	660003		48500	1047					

OK Cancel Refresh

