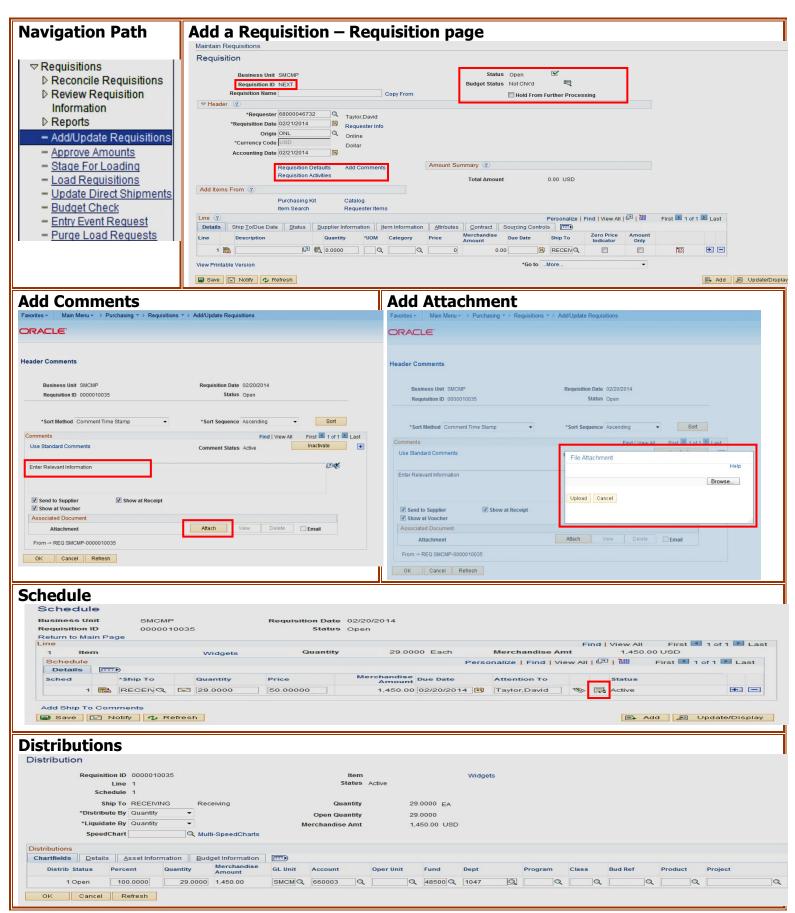
## Enter a Requisition

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 ▶ <b>Select Business Unit</b> – 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	1. Click the Add Comments Link.
Page/Header - <u>Add Comments</u> 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 Suplpier 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 <a href="mailto:procurementservices@csusm.edu">procurementservices@csusm.edu</a> . Reference the Requisition # in the Subject line.

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PeopleSoft Enter a Requisition 9.2 Quick Reference Guide

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