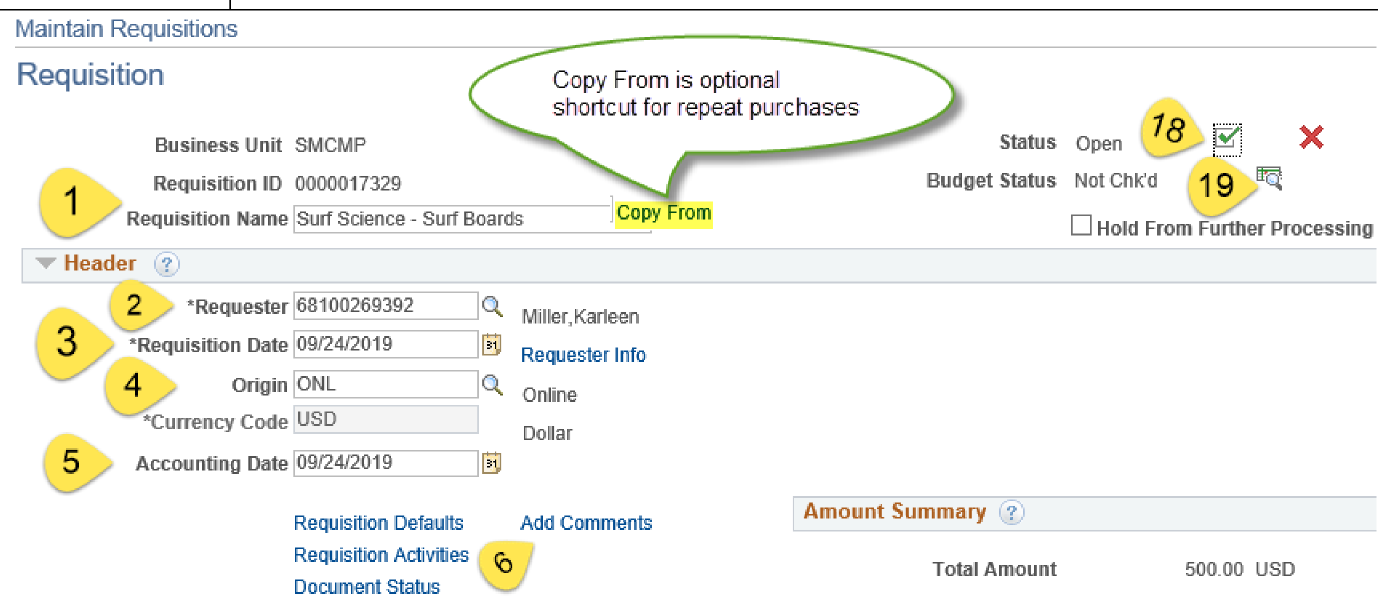
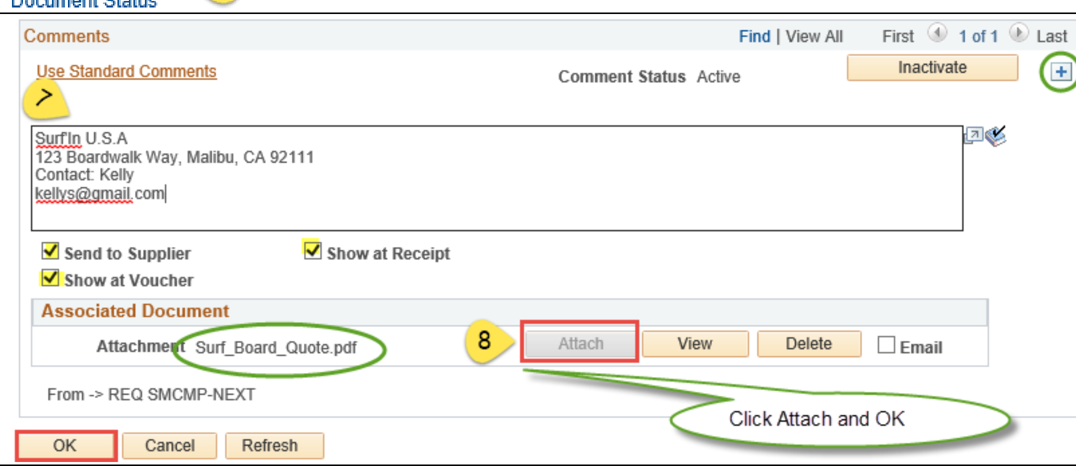
Enter a Requisition

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 *Copy From* will replicate a previous requisition; review for accuracy.
Requisition Header Section Add Comments Add Attachments	**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* **7.** Click all options ☐ Send to Supplier – supplier will see the comment on the PO ☐ Show at Voucher – only accounting tech will see the comment ☐ Show at Receipt – only receiving will see the comment **8.** **Attachments** – required documentation and supporting information i.e. 204, quote etc.



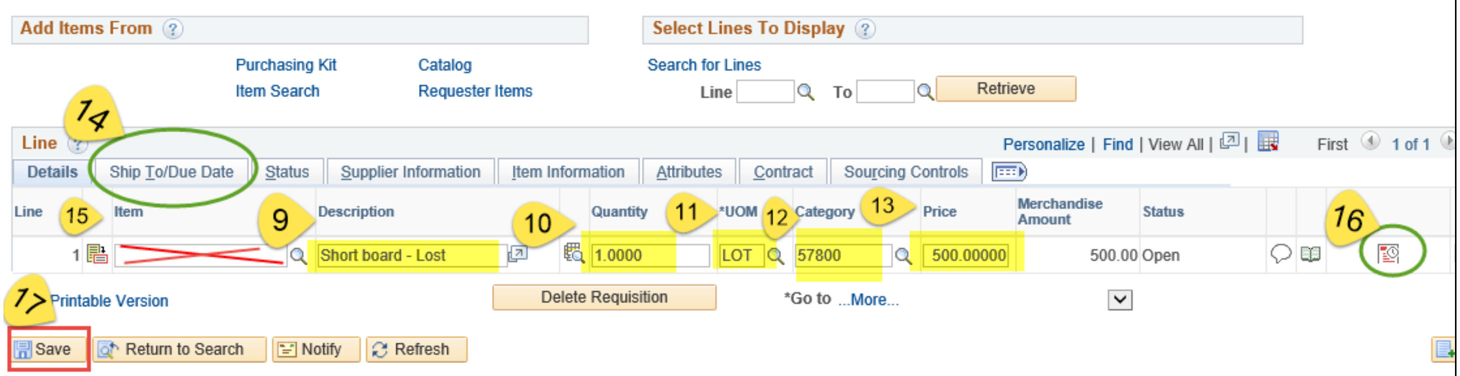
* NOTE – One document per comment; please name the document. Click " + " to add more than one.



<table>
<tr><td>Line Information Section

*15. NOTE – Never enter anything into “Item” field.</td><td>

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.</td></tr>
<tr><td colspan="2">



</td></tr>
<tr><td>Enter Chartfield</td><td>

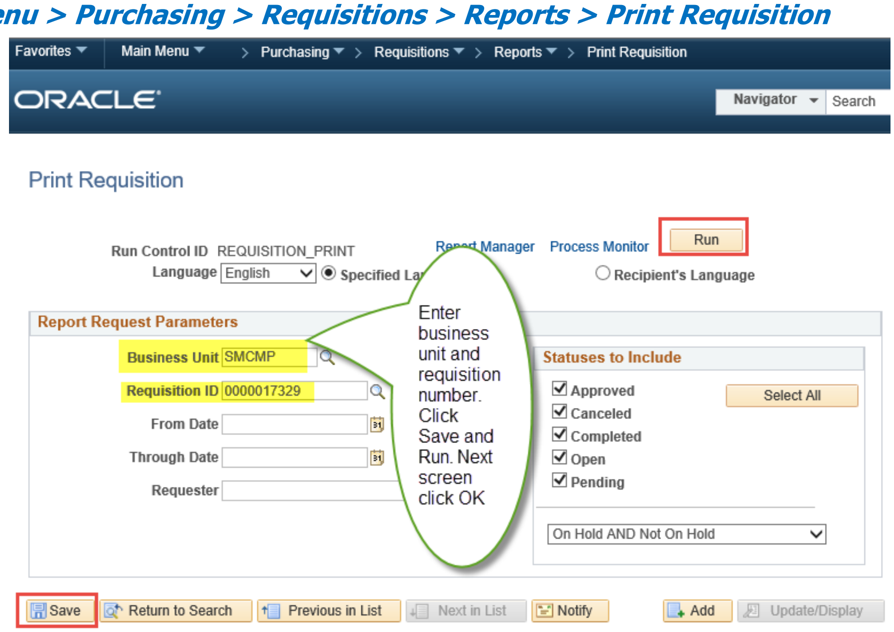
16. Schedule - click to split the distribution. Add row/s and split by amount or quantity.
Distribution Information - enter chartfield.
17. Click OK and Save and a requisition # will be assigned.</td></tr>
<tr><td>Requisition Page/General Section</td><td>

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.</td></tr>
<tr><td>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.</td><td>

Main Menu > Purchasing > Requisitions > Reports > Print Requisition



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