

Enter a Requisition

A Requisition is a request for goods or services for use by your department. The requestor's appropriate administrator approves requisitions before they are processed to the Purchasing department.

Navigation: Purchasing > Requisitions > Add/Update Requisitions> Add a New Value

Section	Process Steps
Requisition (A)	1. Requisition Name which can be used for dept reference number.
Header Section (B)	<ol style="list-style-type: none"> 1. Requestor defaults to the Requestor number (campus ID "40" and 9 digit ID) 2. Requisition Date defaults to the current date. 3. Accounting Date will default to the requisition date. 4. Click on the Requisition Defaults link.
Header Section – Requisition Defaults (C)	<ol style="list-style-type: none"> 1. In the Default Options section, Select "Default". 2. Enter the Supplier ID using the magnifying glass  or attach a Vendor 204 form (comments section). 3. In the Line section, enter Category, UOM and in the schedule section enter Due date. 4. In the distribution section, enter the Chartfield distribution (fund, dept ID, program, class, and project). Click OK to go back to the Maintain Requisitions Page and acknowledge retrofit if applicable.
Header Section – Add or Edit Comments link (D)	<ol style="list-style-type: none"> 1. Click the Add Comments or Edit Comments link. 2. Select the Sent to Vendor, Show at Voucher or Show at Receipt boxes to target the comments to a specific area. 3. Add Attachments, any file type, to the Header Comments page. (one per header comment) 4. Click on the "View" button to make sure the attachment uploaded correctly. 5. Ensure the file name does not include any parenthesis and/or brackets 6. Select "OK".
Requisition Line (E)	<ol style="list-style-type: none"> 1. Click  to view the requisition-line-item long description. 2. Select Refresh to populate fields from Requisition Defaults, then enter the Quantity, UOM, Category, Price, and Due Date. 3. If a line description is a service select the "Amount Only" checkbox. 4. Add or remove lines as necessary using the plus sign (+) or minus sign (-). 5. Click the Schedule icon  to go to the Schedule Page.
Schedule Page/Schedule (F)	<ol style="list-style-type: none"> 1. Click the Distribution icon  to enter accounting information.
Distribution Page/Distribution (G)	<ol style="list-style-type: none"> 1. Remember a distribution must be entered for each line. The distribution only needs to be modified if it is different from what was specified on the Requisition Defaults page. 2. Add or remove lines as necessary using the plus sign (+) or minus sign (-). 3. Click OK then click Return to Main Page.
Requisition Save and Approve (H & I)	<ol style="list-style-type: none"> 1. Select Save. A Requisition ID is assigned. 2. Select  to Approve the Requisition or Notify Approver using the "Notify" button 3. Select the "Notify" button to send the request to approve to the designated person (To, CC, or BCC fields, using a semi-colon as a separator). 4. Specify DELIVERY OPTIONS to view or change the method of the send. 5. Use the Priority field to adjust the urgency of the message. 6. Modify the number in the Subject to correspond with the number in the template text field that most accurately describes the reason for using the notify button. 7. Select "OK" to send the email notification and exit the page.

Navigation Path

Purchasing > Requisitions > Add/Update Requisitions

Add a Requisition

Requisitions

Find an Existing Value Add a New Value

Business Unit: LBCMP

Requisition ID: NEXT

Add

Add/Update a Requisition – Maintain Requisitions page

Maintain Requisitions

Requisition

Business Unit LBCMP

Requisition ID NEXT

Requisition Name Copy From

Status Open Budget Status Not Ch'kd Hold From Further Processing

Header

*Requester 40000040129 Taylor, Doris
 *Requisition Date 08/07/2014 Requirer Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 08/07/2014

Requisition Defaults Edit Comments Requisition Activities

Amount Summary Total Amount 1,250.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Line

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Amount Only	Status	Due Date
1	Independent contractor	1.0000	LOT	96100	1,250.0000	1,250.00	<input checked="" type="checkbox"/>	Open	

View Printable Version

Save Notify Refresh

Requisition Defaults

Requisition Defaults

Business Unit LBCMP Requisition ID NEXT Requisition Date 08/07/2014 Status Open

Default Options: Default Override

Supplier: 96100 Unit of Measure: LOT

Schedule: Ship To RECEIVING Due Date 08/25/2014

Distribution: SpeedChart

Distributions: Details Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Budget Date	Location
1	100.0000	LBCMP	GF001	00214					08/07/2014	FA3-114

Schedule

Schedule

Business Unit LBCMP Requisition ID NEXT Requisition Date 08/07/2014 Status Open

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	RECEIV	1.0000	1,250.00000	1,250.00		Taylor, Doris	Active

Add Ship To Comments: Save Notify Refresh

Distributions

Distribution

Requisition ID: NEXT Item Status: Active independent contractor
 Line 1 Schedule 1
 Ship To: RECEIVING CSULB Recv Quantity: 1.0000 LOT
 *Distribute By: Amount Open Amount: 1,250.000 Merchandise Amt: 1,250.00 USD

Distrib	Status	Percent	Merchandise Amount	GL Unit	Account	Fund	Dept	Program	Class	Project	Location
1	Open	100.0000	1,250.00	LBCMP	GF001	00214					FA3-114

Add Comments

Header Comments

Business Unit LBCMP Requisition ID NEXT Requisition Date 08/07/2014 Status Open

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending

Comments: Find | View All | First | 1 of 1 | Last

Use Standard Comments Comment Status Active Inactivate
 214-172 STEPHANIE DOTSON (GUEST SPEAKER) - Lectures 11/19/14 to students, campus community, community-at-large; plus critique students' work. dotson@sbcc.edu; 635 Olive St., Sta. Barbara, CA 93101; (805) 252-0404 ICPWHA sig. pg. attached

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document: Attachment DOTSON_ICPWHA_sig_pg.pdf Attach View Delete Email

From -> REQ LBCMP-000035067
 OK Cancel Refresh