

ENTER A REQUISITION

A. GETTING THERE

Log in to myHumboldt Portal > Faculty/Staff Resources > PeopleSoft Finance > Main Menu > Purchasing > Requisitions > Add/Update Requisitions > Select Business Unit > Click Add

Purchase Order

Business Unit:

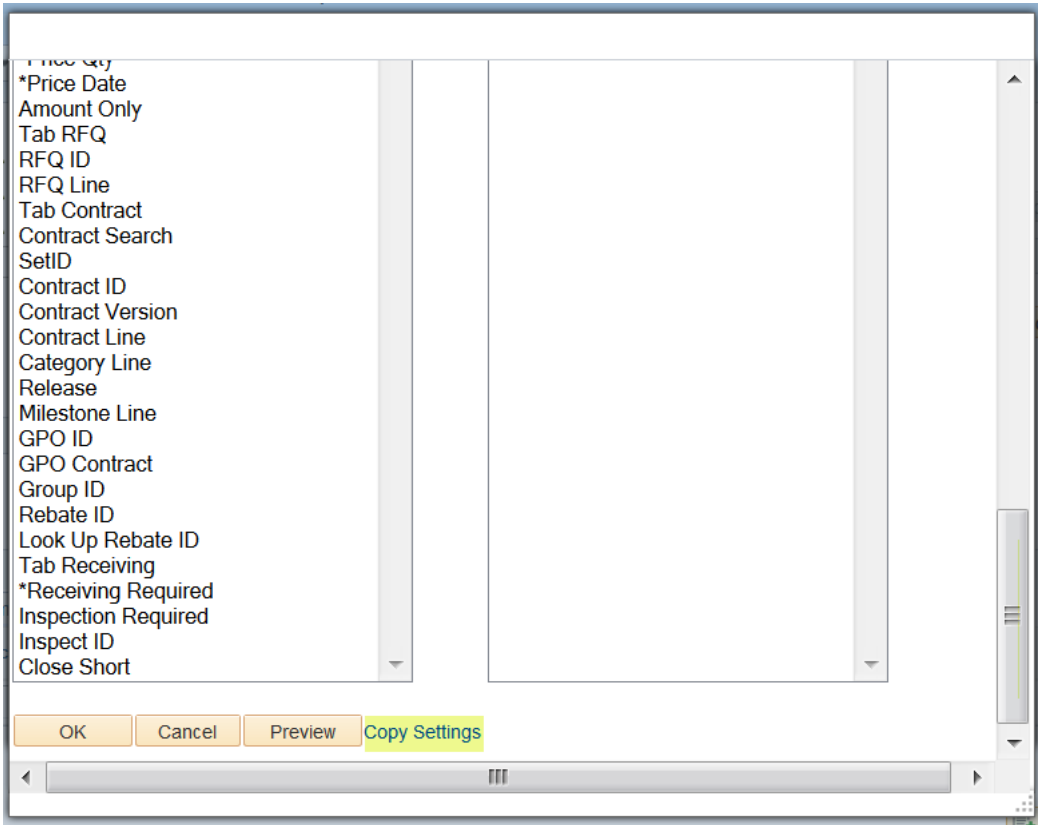
 PO ID:

NOTE: For first-time requisitioners, you will need to copy the HSU_TEMP template. You will only need to do this one time. Click on the blue link Personalize as shown below:

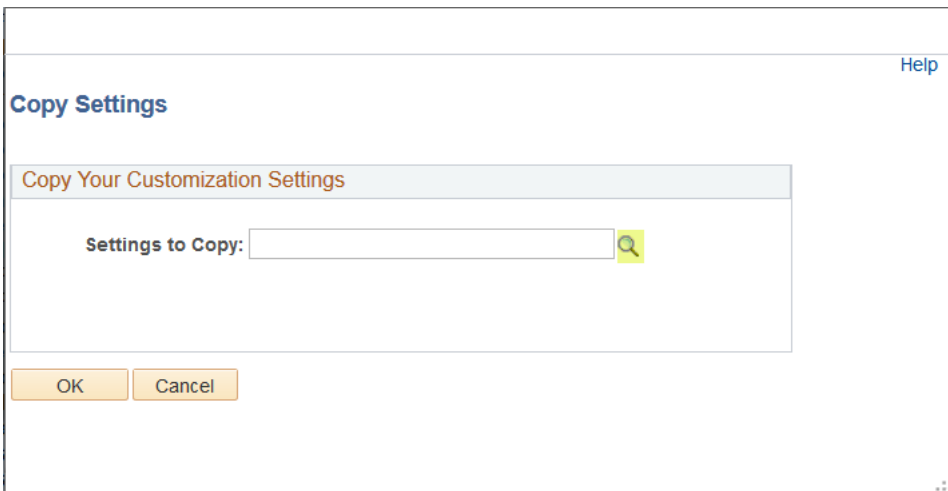
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1						0	0.000	Approved			

[View Printable Version](#)

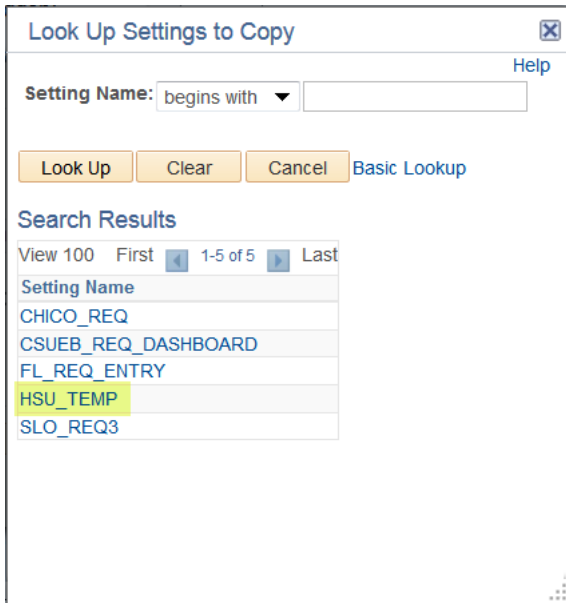
Scroll down and click on the blue link Copy Settings:



Click on the magnifying glass:



Click on the blue link HSU_TEMP:



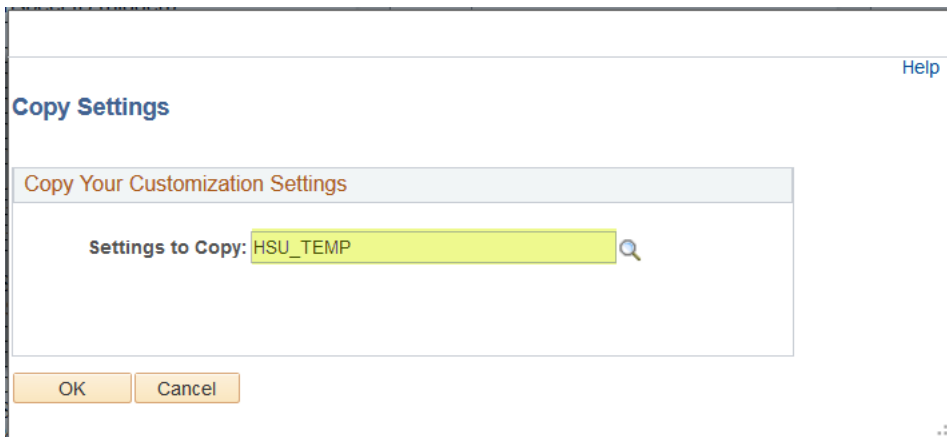
The screenshot shows a dialog box titled "Look Up Settings to Copy" with a close button (X) in the top right corner. Below the title bar, there is a "Setting Name:" label followed by a dropdown menu set to "begins with" and an empty text input field. To the right of the input field is a "Help" link. Below these elements are three buttons: "Look Up", "Clear", and "Cancel". To the right of the "Cancel" button is a blue link labeled "Basic Lookup".

Below the buttons is a section titled "Search Results". At the top of this section are navigation controls: "View 100", "First", "1-5 of 5", and "Last". Below these is a table with one column labeled "Setting Name". The table contains five rows of data:

Setting Name
CHICO_REQ
CSUEB_REQ_DASHBOARD
FL_REQ_ENTRY
HSU_TEMP
SLO_REQ3

The "HSU_TEMP" row is highlighted in yellow.

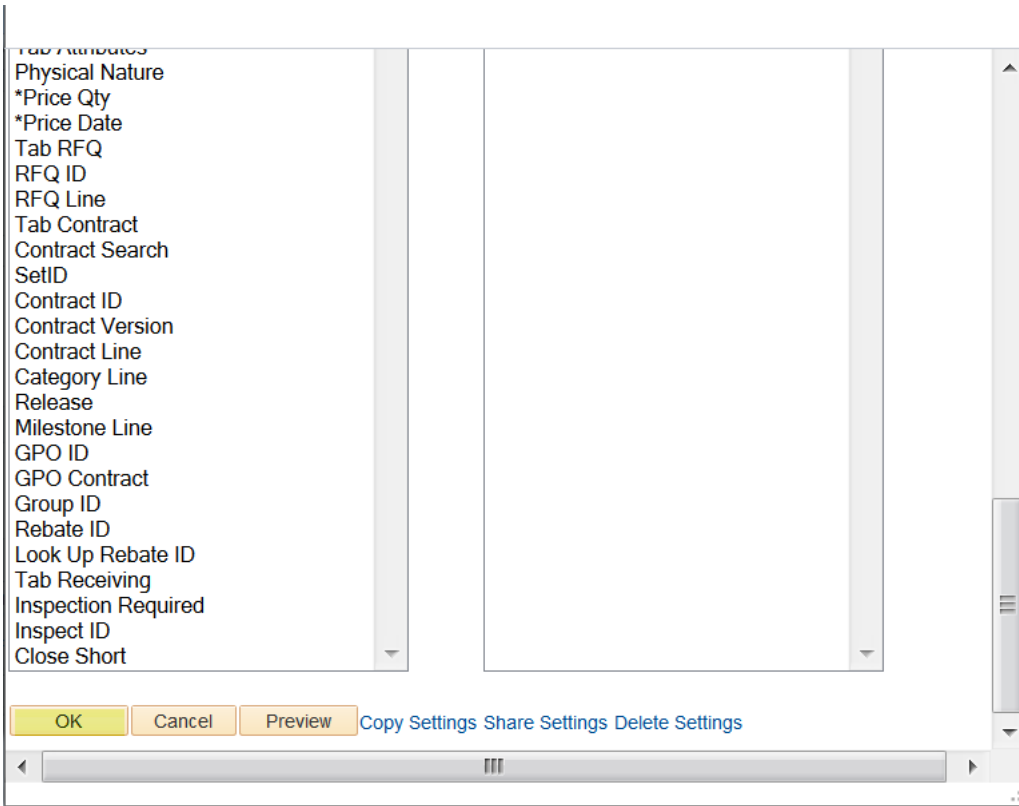
Click OK once the Settings to Copy shows HSU_PO:



The screenshot shows a dialog box titled "Copy Settings" with a "Help" link in the top right corner. Below the title bar is a section titled "Copy Your Customization Settings". Inside this section is a text input field labeled "Settings to Copy:" containing the text "HSU_TEMP" and a magnifying glass icon to its right. The input field is highlighted in yellow.

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Click OK again at the bottom of this screen:

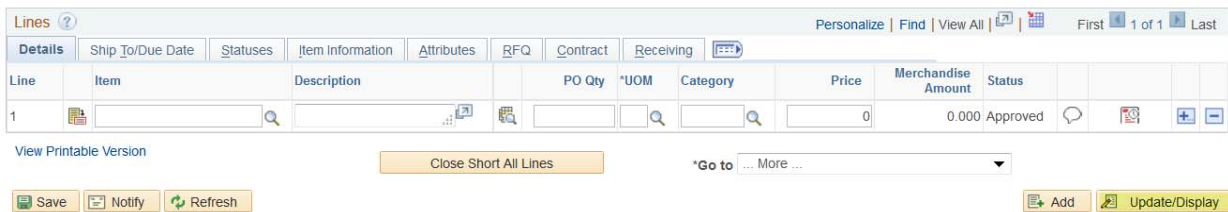


Tab Attributes

- Physical Nature
- *Price Qty
- *Price Date
- Tab RFQ
- RFQ ID
- RFQ Line
- Tab Contract
- Contract Search
- SetID
- Contract ID
- Contract Version
- Contract Line
- Category Line
- Release
- Milestone Line
- GPO ID
- GPO Contract
- Group ID
- Rebate ID
- Look Up Rebate ID
- Tab Receiving
- Inspection Required
- Inspect ID
- Close Short

OK Cancel Preview Copy Settings Share Settings Delete Settings

Click Update/Display in the bottom right corner of your screen:



Lines ? Personalize | Find | View All | First 1 of 1 | Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Approved





View Printable Version Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

You will end up back at this screen where you will select Add a New Value:


Requisitions

Use the following search to look for an existing Requisition.




Business Unit: = 
Requisition ID: begins with
Requisition Name: begins with
Requisition Status: =
Origin: begins with 
Requester: begins with 
Requester Name: begins with 
Hold From Further Processing
 Case Sensitive




Click on Add at the bottom of the screen:


Requisitions

Business Unit: 
Requisition ID:

The HSU Template is now set – notice the Item Field, which HSU does not use, is removed.

Line  Personalize | Find | View All |   First 1 of 1 Last

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status		
1	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open		 

View Printable Version *Go to ...More... 

B. ENTER A REQUISITION

Select Hold from Further Processing:

Maintain Requisitions

Requisition

Business Unit HMCMP
 Requisition ID NEXT
 Requisition Name [Copy From](#)

Status Open
 Budget Status Not Chk'd

Hold From Further Processing

NOTE: At this point you can copy from a requisition, i.e., the previous year's blanket, or other requisitions can all be copied. Then you can just change the information to the current year. Select the blue link Copy From as shown below:

Maintain Requisitions

Requisition

Business Unit HMCMP
 Requisition ID NEXT
 Requisition Name [Copy From](#)

Status Open
 Budget Status Not Chk'd

Hold From Further Processing

Then enter the Requisition ID and click on the yellow Search button:

Maintain Requisitions

Copy Requisition

Header

Business Unit HMCMP
 Requisition ID
 Requisition Name
 Req Status
 Requester
 Requester Name
 Requisition Date
 Supplier SetID HMCMP [Supplier Lookup](#)
 Supplier ID [Supplier Details](#)
 Item SetID HMCMP
 Item Description
 Department
 Origin
 Card Number
 To
 Supplier Name
 Item ID
 Direct Ship

Make sure the correct Req ID is selected and click OK:

Requisition					
Sel	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	000006047		Approved	ONL	30938326903

Confirm that you want to copy the requisition and continue as follows. Remember to change the cloned information to reflect the current fiscal year.

C. REQUISITIONS/HEADER SECTION

Add yourself as the Requester and confirm the Requester Info link has your correct phone/fax numbers. Then click on the Requisition Defaults link.

▼ Header ?

*Requester [Gentry,Denise](#)

*Requisition Date [Requester Info](#)

Origin [Online Entry](#)

*Currency Code [Dollar](#)

Accounting Date [Requisition Defaults](#) [Add Comments](#)

[Requisition Activities](#)

Amount Summary ?

Total Amount 0.00 USD

D. REQUISITION DEFAULTS

Click on Override:

Requisition Defaults

Business Unit HMCMP Requisition Date 08/15/2014


Requisition ID NEXT Status Approved

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 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:

Click on the Magnifying Glass  to select Buyer, Supplier, Category, and Unit of Measure. The Supplier Location field will populate once you select a Supplier.

Line	
Buyer	30932032407  Diaz, Carlos
Supplier	0000016699  FOLLETT HIGHER EDUCATION GROUP INC
Category	57800  Supplier Lookup
Unit of Measure	EA 
Supplier Location	1 












SCHEDULE:

Click on the Due Date Calendar Icon  and select a Due Date; skip the Ultimate Use Code and Attention To fields; change Distribute By/Liquidate By to Amount for blanket orders.



Schedule	
Ship To	SR  Shipping & Receiving
Due Date	08/22/2014 
Ultimate Use Code	
Attention To	
*Distribute By	Quantity 
*Liquidate By	Quantity 







DISTRIBUTIONS:

Enter the Chartfield Distribution. Skip the Percent Field; Verify GL (Business) Unit is **HMCMP**, **HMSPF**, or **HMADV**; Enter Account; skip Oper Unit; Enter Fund, Dept, Program, and Class; skip Bud Ref and Product; and if **HMSPF**, be sure to include Project.

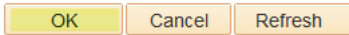
Distributions											
Details 											
Dist	Percent	GL Unit	Account	Oper Unit	Fund	Dept	Program	Class	Bud Ref	Product	Project
1		HMCMP 	660003 		HM500 	D30020 					

Skip the following remaining fields under Distribution.

Personalize | Find | View All |  |  First 1 of 1 Last



Affiliate	Fund Affil	Oper Unit Affil	Budget Date	Location	IN Unit
			08/15/2014 	PURCH 	


Then Click OK in the bottom left corner.




E. HEADER

Click on Add Comments:

Header	
*Requester	30010025987  Gentry,Denise
*Requisition Date	08/15/2014  Requester Info
Origin	ONL  Online Entry
*Currency Code	USD Dollar
Accounting Date	08/15/2014 
Requisition Defaults Add Comments Requisition Activities	

Enter your Comments and check the respective boxes below the comment 1) Send to Supplier (if you want your comment to show on the purchase order to the vendor); 2) Show at Receipt (if you want Shipping & Receiving to see your comment; and 3) Show at Voucher (if you want Accounts Payable to see your Comment). Click the Plus Sign  at the top right of the Comment if you need to add additional comment(s). Click on Attach if you want to upload a quote or other requisition-related documents.

Comments		Find View All	First 1 of 1 Last
Use Standard Comments		Comment Status Active Inactivate 	
Approved by Mike <u>Burghart</u> . Please deliver to <u>CP&RM</u> , <u>SBS</u> 413.			
<input checked="" type="checkbox"/> Send to Supplier	<input checked="" type="checkbox"/> Show at Receipt		
<input checked="" type="checkbox"/> Show at Voucher			
Associated Document			
Attachment	Attach	View	Delete <input type="checkbox"/> Email
From -> REQ HMCMP-NEXT			

Note: If this is for a new vendor (3409 – XXX-CHANGE ME), please add the new vendor information in a comment and select Show at Voucher as shown below. Be sure to add a comment for your name and contact information as the requester; select Show at Receipt and Show at Voucher for this comment.

To remove a comment, click Inactivate in the upper right.

Comments Find | View All First 2 of 2 Last

Use Standard Comments Comment Status Active Inactivate +

New Supplier Information:


New Supplier Name
 Supplier Street Address
 Supplier City, State & Zip
 Supplier Telephone, Fax, Email

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

F. REQUISITIONS LINE

Enter Description, Quantity and the Price. You do not have to enter UOM or Category if you entered these in Requisition Defaults. Click on the yellow Save button. Click the Plus Sign  at the end of the line to add additional lines.

Line Personalize | Find | View All | First 1 of 1 Last




Details

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	Chemistry Books	42.0000	EA	57800	25.50000	1,071.00	Approved

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


If you only have one Line item, please skip to I. REQUISITION PAGE/GENERAL INFO.

G. SCHEDULE


To add lines, click the Plus  sign at the end of the line. Click the Schedule Icon  to go the Schedule Page. Click the Distribution Icon  to enter chartfield information. This line is where you can distribute the cost of the purchase by Amount or Percent.

H. DISTRIBUTION



NOTE: You only need to enter a chartfield on this distribution line if you have not already specified the chartfield on the Requisition Defaults page.

Enter Percent, if necessary, to split the chartfield, Quantity, GL (Business) Unit, Account, skip Oper Unit, enter Fund, Dept, Program, Class, skip Bud Ref and Product, Project (if HMSPF), skip Affiliate, Fund Affiliate, and Oper Unit Affil. To add additional distribution lines, click the Plus Sign  at the end of the line.


Distributions									
Chartfields	Details	Asset Information	Budget Information						
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Account	Oper Unit	Fund	Dept
1	Open	100.0000	42.0000	1,071.00	HMCMP	660003		HM50	D30020

Personalize | Find | View All |  | First 1 of 1 Last

Program	Class	Bud Ref	Product	Project	Affiliate	Fund Affiliate	Oper Unit Affil		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

I. REQUISITION PAGE/GENERAL INFO

After clicking Save, a Requisition ID is assigned. Take the requisition off of Hold From Further Processing. Click on the Green Open Check Mark button to change to Approved. Select the Budget Check Icon  to Budget Check the Requisition.

[Maintain Requisitions](#)

Requisition

Business Unit HMCMP
 Requisition ID 0000006827
 Requisition Name 0000006827

Status **Approved** 
 Budget Status Not Chk'd 
 Hold From Further Processing

Once the status is approved and budget check is completed, the Budget Check Status will show Valid. Do not click on the red X unless you want to cancel your requisition.

[Maintain Requisitions](#)**Requisition****Business Unit** HMCMP**Requisition ID** 0000006827**Requisition Name** 0000006827**Status** Approved**Budget Status** Valid Hold From Further Processing

PRINT A REQUISITION

A. GETTING THERE

Log in to myHumboldt Portal > Faculty/Staff Resources > PeopleSoft Finance > Main Menu > Purchasing > Requisitions > Reports > Print Requisition

B. SELECTING A RUN CONTROL ID

If a Run Control ID already exists, select the Yellow Search Button to locate it.

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

Run Control ID: begins with ▼

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Select the Run Control ID.

Run Control ID: begins with ▼

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

Search Results

Run Control ID
Ginger
ace
drg34
gentry
printreq

If a Run Control ID does not exist, select Add a New Value.

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Run Control ID: begins with ▼

Case Sensitive

[Basic Search](#)

Once you Add a New Value, e.g., 'printreq,' it will bring up the Print Requisition Screen (shown under C. REPORT REQUEST PARAMETERS).

NOTE: Do not use special characters (',&,%,\$,etc.) and do not use spaces when adding a new value.

C. REPORT REQUEST PARAMETERS

- Select a Business Unit
- Click on Prompt to locate the Requisition ID or Enter a Requisition ID
- Check all of the Statuses to Include or Click on the yellow Select All button
- In the dropdown below Statuses to Include, select On Hold AND Not on Hold
- Select the Run button located at the top right of the page

Print Requisition

Run Control ID PrintReqs Report Manager Process Monitor **Run**

Language English Specified Language Recipient's Language Process Instance:6365921

Report Request Parameters


<p>Business Unit <input type="text" value="HMCMP"/></p> <p>Requisition ID <input type="text" value="0000006827"/></p> <p>From Date <input type="text"/></p> <p>Through Date <input type="text"/></p> <p>Requester <input type="text"/></p>	<p>Statuses to Include</p> <p><input checked="" type="checkbox"/> Approved Select All</p> <p><input checked="" type="checkbox"/> Canceled</p> <p><input checked="" type="checkbox"/> Completed</p> <p><input checked="" type="checkbox"/> Open</p> <p><input checked="" type="checkbox"/> Pending</p> <hr/> <p><input type="text" value="On Hold AND Not On Hold"/></p>
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D. PROCESS SCHEDULER REQUEST


Click on Select so that a checkmark shows before Requisition Print SQR. Click on Email from the dropdown menu in the Type field. Click on PDF from the dropdown menu in the Format field. Click OK at the bottom left of the screen.

Process Scheduler Request

User ID: 30010025987 Run Control ID: PrintReqs



Server Name: Run Date: 08/18/2014 

Recurrence: Run Time: 1:10:20PM

Time Zone: 

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Email	PDF	Distribution

You will then receive an email from FCFSPRD@calstate.edu which includes a PDF of your requisition.

 **FCFSPRD@calstate.edu** **1:14 PM**
 Output from PORQ010 (#6365992) 



Click on the attachment within the email. Select File then Print from the top left or select the Printer icon in the toolbar:

File Edit View Window Help

Create [Icons] Customize

1 / 1 146% Tools Sign Comment

Requisition

Humboldt State University

Ship To: Shipping & Receiving
Humboldt State University
1 Harpst St
Arcata CA 95521-8299

Business Unit:		HMCMP	APPROVED
Req ID	Date	Page	
0000006827	08/15/2014	1	
Requester	Telephone	Entered By	
Gentry,Denise	3303	Gentry,Denise	

Line-Schd-Dist	Description	Fund	Dept	Category	Quantity	UOM	Price	Extended Amt	Due Date
Distribution	Account			Prgm	Class	Project		Dist Amt	
Buyer: Gentry,Denise									
Supplier: 0000016699 FOLLETT HIGHER EDUCATION GROUP INC									
1-1	Chemistry Books			57800	42.0000	EA	25.50	1,071.00	08/22/2014
1-1-1	660003	HM500	D30020						1,071.00
<u>Line Total:</u>								1,071.00	

Please contact our office at x3512 if you have any questions.

* End of Instructions *