

## 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: 

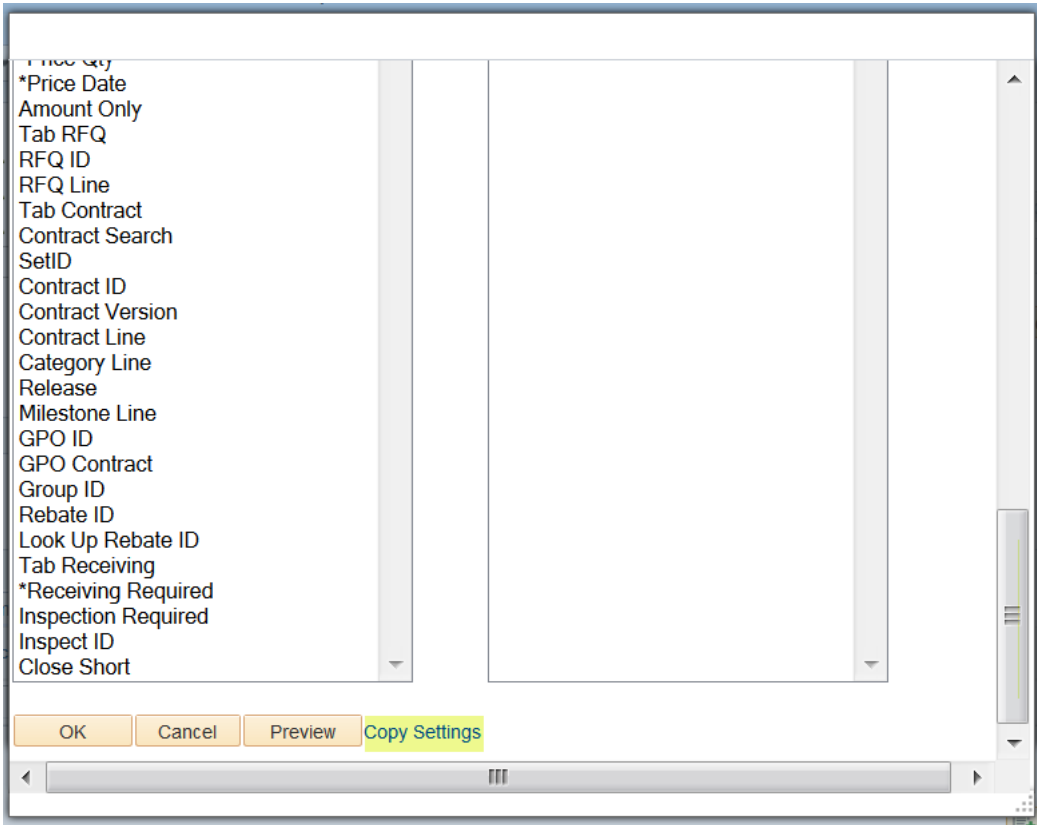
  
 PO ID:

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:

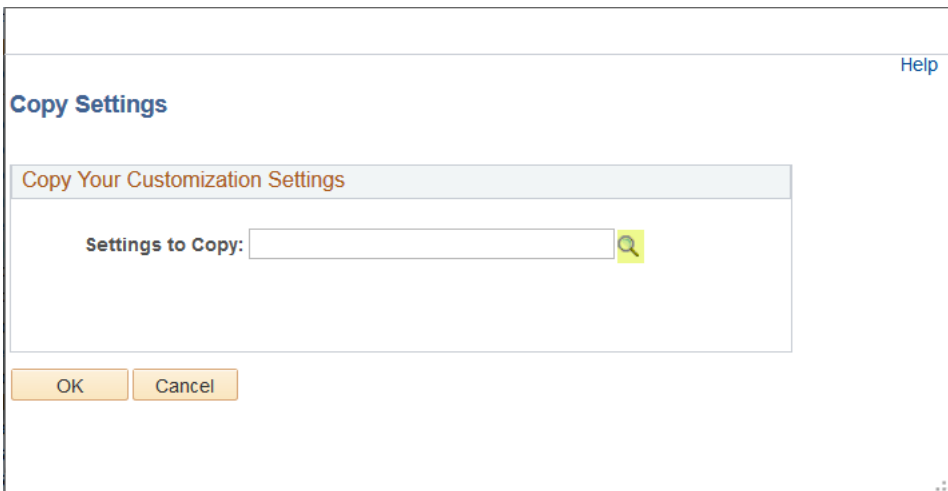
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1						0	0.000	Approved			

[View Printable Version](#)

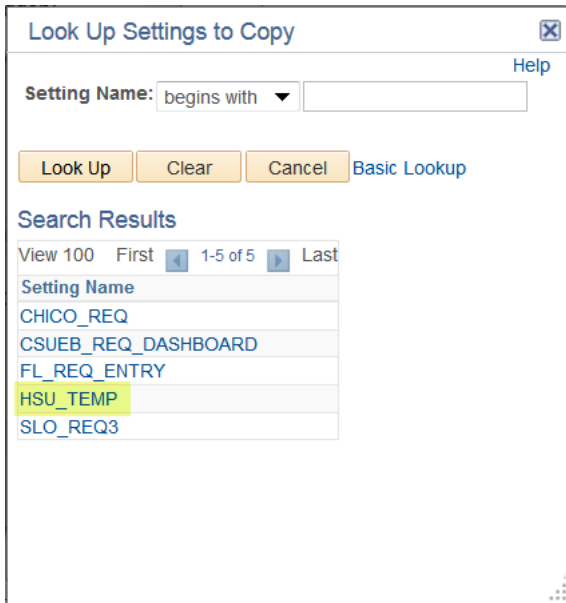
Scroll down and click on the blue link Copy Settings:



Click on the magnifying glass:



Click on the blue link HSU\_TEMP:



Look Up Settings to Copy Help

Setting Name: begins with

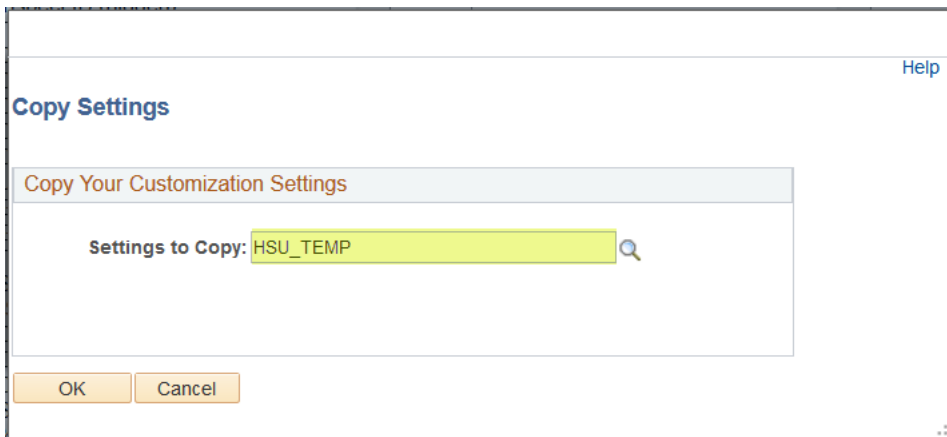
[Basic Lookup](#)

**Search Results**

View 100 First  1-5 of 5  Last

Setting Name
<a href="#">CHICO_REQ</a>
<a href="#">CSUEB_REQ_DASHBOARD</a>
<a href="#">FL_REQ_ENTRY</a>
<a href="#">HSU_TEMP</a>
<a href="#">SLO_REQ3</a>

Click OK once the Settings to Copy shows HSU\_PO:



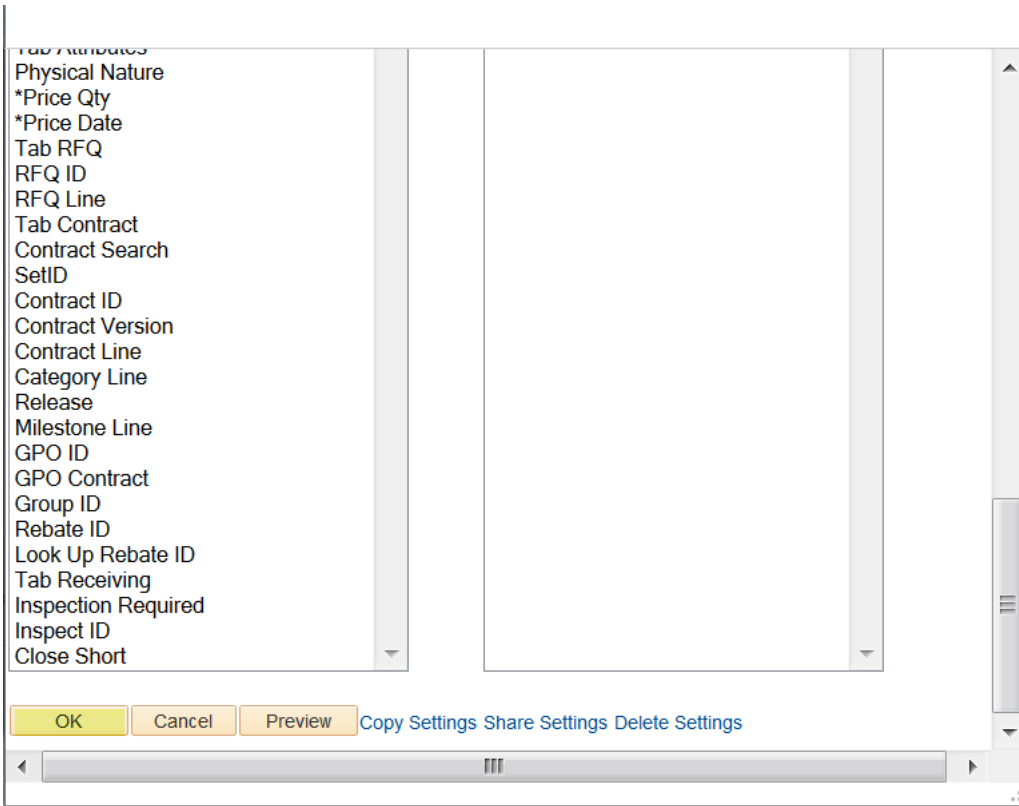
Help

**Copy Settings**

Copy Your Customization Settings

Settings to Copy:

Click OK again at the bottom of this screen:

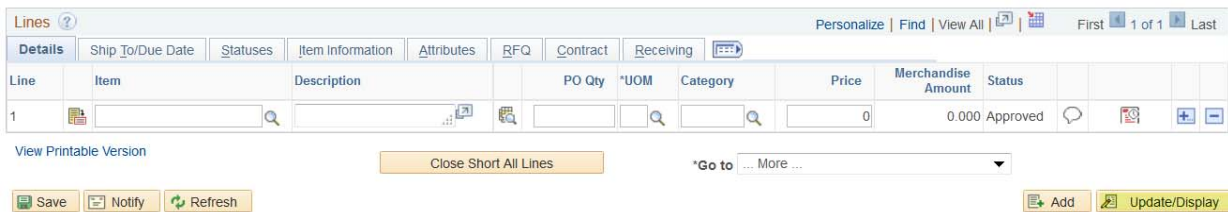


Tab Attributes

- 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

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

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  <a href="#">Supplier Lookup</a>
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 					

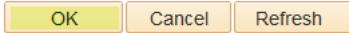
Skip the following remaining fields under Distribution.

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 ?

<b>*Requester</b>	30010025987	Gentry,Denise
<b>*Requisition Date</b>	08/15/2014	Requester Info
<b>Origin</b>	ONL	Online Entry
<b>*Currency Code</b>	USD	Dollar
<b>Accounting Date</b>	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 Burghart.

Please deliver to CP&RM, SBS 413.

**Send to Supplier**    **Show at Receipt**

**Show at Voucher**

**Associated Document**

<b>Attachment</b>	<a href="#">Attach</a> <a href="#">View</a> <a href="#">Delete</a> <input type="checkbox"/> <b>Email</b>
-------------------	--

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									
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"/>

## 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:

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**

Business Unit <input type="text" value="HMCMP"/>	<b>Statuses to Include</b> <input checked="" type="checkbox"/> Approved <span style="float: right;"><b>Select All</b></span> <input checked="" type="checkbox"/> Canceled <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Pending  <input type="text" value="On Hold AND Not On Hold"/>
Requisition ID <input type="text" value="0000006827"/>	
From Date <input type="text"/>	
Through Date <input type="text"/>	
Requester <input type="text"/>	


## 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](mailto: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:

**Requisition**  
Humboldt State University

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

Business Unit:	<b>HMCMP</b>	<b>APPROVED</b>
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 \*