

LOS RIOS COMMUNITY COLLEGE DISTRICT

Purchasing Department

User Guide for Requisitions

General Services Department

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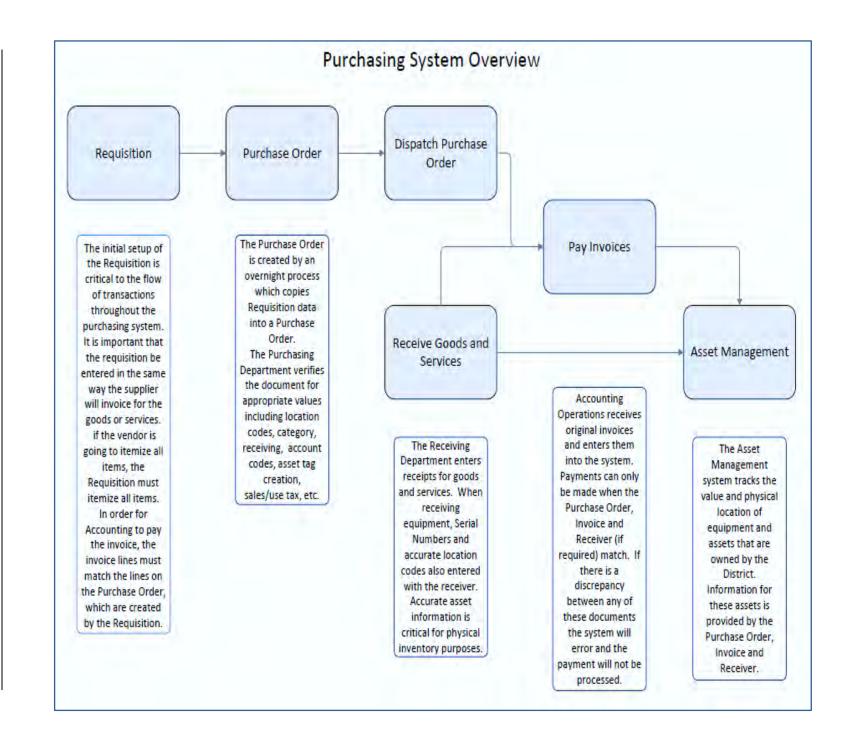
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Before we begin...

The Requisition is the initial document in the Purchasing process. This process not only involves Purchasing, but also impacts Receiving, Accounts Payable and Asset Management. The examples that follow are provided with the entire procurement process in mind.

The PeopleSoft Financial System is an enterprise application that has many integrated modules. In order to understand the reasoning behind why we create transactions in the manner we do, it is important to note the relationships that exist between the modules. The following illustration provides a graphical summary of how purchases are managed at Los Rios.



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Section 1 - Create a New Requisition

Creating a new requisition is the first step in PeopleSoft Purchasing. There are many different types of purchases made throughout the District. Depending on the type of purchase you are initiating, the requisition attributes play a significant role in how efficiently your request flows through the system. In Section 9 you can find detailed information on specific requisition setup for different types of purchases.

NAVIGATE TO THE	REQUISITION MENU
Main Menu > Purchasing > Requisitions > Add/Update Requisitions Click Add	Favorites Main Menu Purchasing Add/Update Requisitions
Let the Requisition ID default by leaving "NEXT" in the Requisition ID field. The Business Unit defaults from your user profile. If you are purchasing with funds from a different Business Unit, make the change here. The Lookup icon is used throughout all PeopleSoft applications. You can use this button to look up a list of values for the field immediately to the left.	Find an Existing Value Add a New Value Business Unit GENFD Requisition 1D Add Find an Existing Value Add a New Value

MAINTAIN REQUISITIONS		
The Maintain Requisitions page displays a view of the	Fandlis • Man Menij • Piptisang • / Regulations • Addupter Regulations New Workse Hep Pintonatos Pape Maintain Regulations Regulation	
Header information and the Line	Buisteness Unit GEN/D Status Open Berganistics 10 NDXT Builder Status Mid CM/d Requision Name Exp / Forg	
information.	• Theoder: T • Organization: Q, Entered By: W0000070 Cincy Petry • Residue bale 05/2000 7 • Registrate rob Origin Oxic. Q, Online • Contrary Code USD Octar Accounting bale 05/2000 7 Bi # Contrary Petry	
Click on the Personalize link to hide the fields you will	Approved by Amount Summary Other of Approval Reputation Data Reputation Data Reputation Data Reputation Data Reputation	
not need.	Defails Sho [ofDue Date: Status: Support Information Amountair Sources Status Like Rein Delargende Guurdity YOOM Calagory Price Merchandler Massard Status 1 B (Q) (D) (Q) (Q) (Q) (D) (D	
You will only need to perform this step once. The system will remember your preferences.	Vee Notes Vision "Go to Jubre. V Sere (2) Notes (2) Notes (2) Notes (2) Updaw/Daptay	

PEOPLESOFT REQUISITIONS

Scroll to the bottom of			
he Personalize	Personalize Column and Sort Orde	er	^
olumn and Sort Order list page.	To order columns or add fields to sort order, highligh Frozen columns display under every tab.	t column name, then press the appropriate but	ton
	Column Order Tab Details (frozen)	Sort Order	
Click on the Copy Settings link	Line (frozen) Details (frozen) Item (hidden) Description (frozen) Item Search (hidden) Quantity Hidd 'UOM Category Price Merchandise Amount Status (hidden) Suppler Name Ship To Amount Only Line Comments Defaults Schedule Tab Ship To/Due Date (hidden) Due Date (hidden) Price (hidden) Schedule. Tab Status (hidden) Schedule. Tab Status (hidden) Schedule. Tab Suppler Information (hidden) Supplier (hidden) Location (hidden) Tab Supplier Information (hidden) Stockless Item (hidden) Stockless Item (hidden) Supplier Internation (hidden) Supplier Texking (hidden) Supplier's Catalog (hidden) Manufacturer's Item ID (hidden) Tab Supplier's Catalog (hidden) Manufacturer's Item ID (hidden) Tab Xupplier (hidden) Name (h		Cescending
	Inspect ID (hidden) Tab Contract (hidden) Contract Search (hidden) Contract Version (hidden) Contract Une (hidden) Contract Line (hidden) Category Line Number (hidden) Use Contract Available (hidden) GPO ID (hidden) GPO Contract Number (hidden) Tab Sourcing Controls (hidden) Source Status (hidden) 'Source Date (hidden) Calculate Price (hidden) Source To Inventory (hidden) Source To Inventory (hidden) Source To Inventory (hidden) % Unit Price Tolerance - Under (hidden) Unit Price Tolerance - Under (hidden) Unit Price Tolerance - Under (hidden) Unit Price Tolerance - Under (hidden)		
	OK Cancel Preview Copy Si	ettings Share Settings Delete Settings	Ŷ

MAINTAIN REQUISITIONS		
Use the lookup icon to copy the LR template.	Copy Settings Copy Your Customization Settings Settings to Copy:	Help
Select the LR REQ setting. Click OK twice to get back to the Requisition page. The page customization takes effect the next time you open a Requisition.	Look Up Settings to Copy Help Setting Name begins with T Look Up Clear Cancel Basic Lookup Search Results View 100 First 1 of 1 Last Setting Name LR REQ	

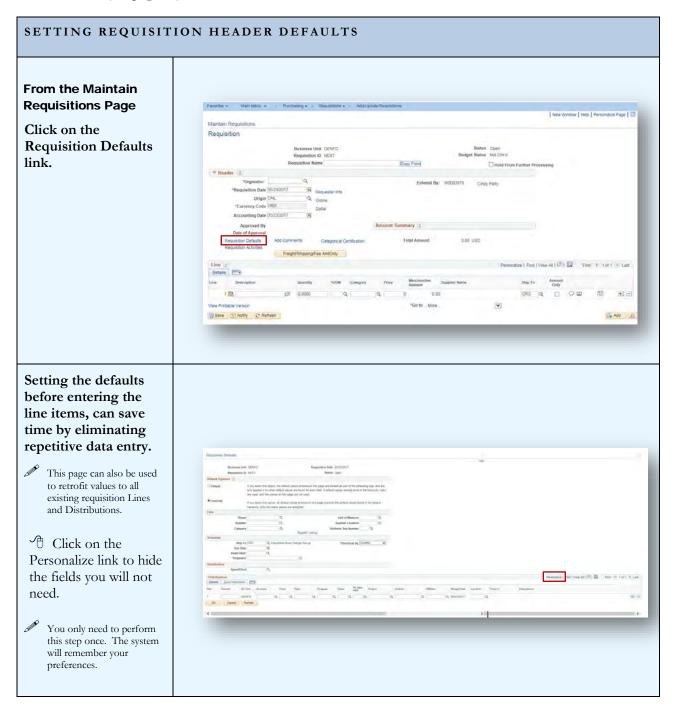
REQUISITION		
The upper portion of the Requisition page contains general information.	Favorites Main Menu > Purchasing > Add/Update Requisitions Maintain Requisitions Maintain Requisitions Business Unit GENFD Requisition ID NEXT Status Open Budget Status Not Chk'd Requisition Name Copy From Hold From Further Processing	
Business Unit	The Business Unit value defaults from your user setup.	
Status	The initial Requisition status is "Open". Upon approval, the status updates to "Approved". The Requisition remains "Approved" until the subsequent Purchase Order is complete. The status will then update to "Complete".	
Requisition ID	"NEXT" will be displayed when you initiate the Requisition. The system will assign a Requisition ID when the transaction is saved.	
Budget Status	The initial budget status is "Not Checked". Budget Checking can be run by clicking the ^{II} con. When the process completes, the status will update to either "Valid" or "Error". There is also a nightly batch process that budget checks Requisitions.	
Requisition Name	You can give your requisition a meaningful name which can help locate the transaction later. If the field is left blank, the system will insert the Requisition ID here.	
Copy From	To save time on recurring orders, you can copy from a previous requisition. (see page 46)	
Hold From Further Processing	Checking this box prevents the requisition from being processed further. A requisition on hold will not be budget checked or sourced to a Purchase Order.	

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HEADER		
The Header contains values that apply to all Requisition Lines and Distributions	Vertication Violation W0392005 Greeg.Jason L Entered By: W0002223 Jason Gregg "Requisition Date Violation Date Violation Date Violation Date Violation Date "Requisition Date Violation Date Violation Date Violation Date Violation Date Origin O District Office District Office Dollar Accounting Date Violation Defaults Add Comments Categorical Certification Total Amount 68,935.95 USD Requisition Activities Freight/Shipping/Fee AmtOniy Select Lines To Display @ Search for Lines Line To Retrieve Retrieve Note	
Originator	Enter the ID of the person initiating the order. You can use the lookup \bigcirc to search.	
Entered By	This ID defaults to the person entering the requisition.	
Requisition Date	The date defaults to current date.	
Origin	This value is defaulted from your user setup.	
Currency Code	The system is setup for US Dollars.	
Accounting Date	This field will default to the Requisition Date.	
Requisition Defaults	This link opens the Requisition Defaults Page. (see page 10)	
Add Comments	This link opens the Comments Page. (see page 17)	
Categorical Certification	Use this area to record the compliance of expenditures when using categorical funding.	
Requisition Activities	This link opens an activities subpage where you can track activities related to the Requisition.	
Freight/Shipping/Fee Amt Only	This I will set the attributes for Fees, Freight, and Shipping lines on the requisition.	
Total Amount	The total amount of the requisition is displayed upon saving. (Please note: requisitions do not include sales tax. Be sure to allow enough in your budget to cover applicable taxes which will be added on the purchase order.)	
Pre-Encumbrance Balance	This is the amount of funds pre-encumbered against the budgets on the Requisition. (Displays after the requisition is saved.)	
Select Lines to Display	This feature allows you to search for a select group of lines on multi-line requisitions.	

Section 2 - Requisition Header Defaults

Setting Requisition Defaults can be done at two different levels. You can set Header Defaults which apply to all lines and distributions on the Requisition, or you can set Line Defaults which apply to an individual line. (see page 22)



SETTING REQUISITIO	ON HEADER DEFAULTS	
Click on the Copy Settings link at the bottom of the	Distributions	-
Personalize Column and Sort Order page.	Personalize Column and Sort Order To order columns display under every tab. Column Order Tab Details (frozen) Percent CU Unit (hidden) Program Class Frozen Profiel D Tab Asset Information Norifie ID Tab Asset Information Norifie ID Tab Asset Information Norifie ID Cost Type Description OK Carcel Proview Copy Settings Thare Settings Delete Settings	n. T
Use the lookup icon Q to copy the settings template.	Copy Settings Copy Your Customization Settings Settings to Copy:	Help

SETTING REQUISIT	TION HEADER DEFAULTS
Select the LR REQ setting. Click OK twice to get back to the Requisition Defaults page. The page customization takes effect the next time you open a Requisition.	Look Up Settings to Copy Help Setting Name begins with T Look Up Clear Cancel Basic Lookup Search Results View 100 First 1 of 1 Clast Setting Name LR REQ
Requisition Defaults Page	Requisition Defaults. Beguisition DEfaults. Requisition ID NEXT Requisition ID NEXT Status Open Default Default Default Plotebult objections Plotebult Supplier Q Supplier Q Plotebult Supplier Q </td
Buyer	Enter or use 🔍 to lookup the Buyer for your location.
Supplier	Enter or use to lookup the Supplier you would like to use.
Category	Enter or use 🔍 to lookup the Category for the items you are requesting.

SETTING REQUISITION HEADER DEFAULTS	
Unit of Measure	Enter or use to look up the unit of measure that applies to the majority of your line items.
Supplier Location	This value defaults from the supplier ID.
Address Seq Number	Use the magnifying glass Q to select the address you would like the purchase order sent to.
Ship To	Select the receiving location where the items should be delivered. <i>If the line items on the order are non-taxable (such as services or software delivered electronically), choose the applicable NOTAX Ship To Location.</i> There are also Ship To Locations set up for Library Book orders and Outreach Centers.
Due Date	Enter the date your items/services are required (this will default to).
Asset Department	This value is required for items purchased with 64xx accounts. The Asset Department indicates the area that is <u>paying for the asset</u> , not the location where the asset will be housed.
Originator	Enter the ID of the employee originating the request. This will default from the Requisition Header.
Budget Distributions	• Account • Fund • Dept • Program • Class • Project
	Entering chartfield values here will save data entry on each individual line. You can change the budget on individual Requisition Lines where applicable. (see Requisition Line Defaults page 23)
Location	The Location Code identifies the specific on-site location for the goods or services. <i>It is critical to provide an accurate Location Code for equipment</i> . This Location Code will be used by auditors to locate assets.
Profile ID	A Profile ID is required for asset purchases. The Profile ID identifies the specific type of asset being purchased. This value may be different for a number of items on the same requisition. For instance, a computer will have a Profile ID of COMPU, a monitor will have a Profile ID of COMPMONT and the recycle fee for the monitor will have a Profile ID of COMP:FEES. The different Profile IDs are necessary because different asset types have differing depreciation and tagging rules.

SETTING REQUISITIO	ON HEADER DEFAULTS	
Click OK to return to the Requisition	Paromis + Main Monu + s Purchaesg + s Récuestions + s AdarUpdate Reguistions. Maintain Requisitions	New Window Het: Personalize Page 🗐
	Nequisition ID: NDXT Bludget 54 Reputsition Name Copy From	alar Opp And Not China Hold From Further Processing Cricky Patry Perconduca Find View At C ² So First 4 t of t 14 Last Step To Annote Original China Chin

Section 3 – Requisition Lines

Requisition Lines contain the detailed information for the products or services requested. The attributes that you set for each requisition line will dictate how the order flows through the system. Refer to section 10 for examples of how different types of Requisitions should be set up.

LINES	
The Line section of the Requisition contains the detail of the request. The line is where you set the attributes applicable to the item or service that you are requesting.	Line Personalize [Find [View Al] [2]] Find (View Al] [2]] </th
Line	Displays the line number.
Description	Enter the description of the item or service requested. <i>Please phrase your description in a manner that will make it easy for the next user to understand what it is you are requesting.</i> A technical description of an item may be perfectly clear to someone familiar with the product. But someone in Purchasing, Accounting or Asset Management may not possess the same level of expertise in the commodity requested. A clear description will help get your order processed more efficiently (see Section 10 for examples).
E	This Icon displays the entire description for review and editing.
Quantity	Enter the quantity for the line.
UOM	Enter or use to lookup the Unit of Measure for the line. This value can be defaulted from the Requisition Defaults. (see page 10)
Category	Enter or use \bigcirc to lookup the Category that applies to the line item. This value can be defaulted from the Requisition Defaults. (see page 10)
Price	Enter the unit price for the line.
Merchandise Amount	The calculated line amount will display upon saving.
Ship To	The Ship To defaults from the Requester setup. This value can also be defaulted from the Requisition Defaults (see page 10).

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LINES	
Supplier Name	The supplier name is displayed here.
Amount Only	This checkbox should be flagged for items that may require multiple payments. Blanket Orders are always Amount Only.
0	This Icon opens the Line Comments Page. (see page 17)
B	This Icon opens the Line Defaults Page. (see page 22)
+	These buttons add or delete lines on the requisition.
View Printable Version	The View Printable Version link generates the requisition report and displays it in PDF format.
Delete Requisition	The Delete Requisition pushbutton is available after save and before successful budget checking. Once the Budget Status is valid, the Requisition can no longer be deleted. (See cancelling a Requisition, page)
Save	Saving the Requisition will trigger a few things. The defaults that were set on the Header Defaults will populate to the Requisition Lines, the Merchandise and Total Amounts will calculate, the Delete pushbutton will be visible and a Requisition ID will be assigned.
Notify	The Notify pushbutton allows you to generate an email notification (see page 26).

Section 4 - Comments and Attachments

Comments and Attachments, like defaults, can be added at either the Header or Line level. Comments and Attachments on the Header apply to the entire requisition and will print after the line items on the Purchase Order.

COMMENTS AND ATTA	ACHMENTS	
COMMENTS On the Requisition Header Click on the Add Comments link. If a comment or attachment already exists on the Requisition Header, the link will read "Edit Comments" instead of "Add	Ferritins = Maintain Requisitions Maintain Requisitions Basiliess Unit (SENPD) Requisition Basiliess Unit (SENPD) Requisition (Maint) Basiliess Unit (SENPD) Requisition (SENPD) Requisition (Requisition (Report)	New Window Head Personalize Pape Series Open Rudget States Not Child Indeet Free Functions Warrie Dollers Varier Dollers
Comments".	Line of	Personalize Find Vew All [[2] [2] Find All 1 al 1 A Last
Comments entered here will copy to the Purchase Order and print on the Purchase Order following the PO Lines.	Details Min Manual Support Like Description Gauntity 1904 Datagony Nice Manual Support + Ba 22 0.0000 Q Q G 0.00 Value Principit/Vecan *Ga to More *Ga to More (Some Q) Nodry Q2 features *Ga to More	aani Dag Ta Ansaal Dog Q D C D Ta Ali al (v) (v)
On The Requisition Line	Farchtes - Man Mercy - Putchasing - Requisitorie - Additiption Regimbere Maintain Regissione Regulation	New Window Heiz Personalce Pape 🗐
Access the Line	Basaness Unit: GENFD	Status Open
Comments page by	Requisition ID NEXT But Regulation Name (Dapy From)	dget Stales Not Child
clicking the cicon. Comments entered here will copy to the Purchase Order and print on the Purchase Order immediately following the Line Item.	Theorem of the solution o	Vaume Dobbers 105 UIDD Personation Fired Verw All (21) 🐼 First 🔶 1 at 5 % Last

COMMENTS AND ATTAC	CHMENTS	
The Comments page		
provides a text box for	Header Comments	
comments and an		
attachment option for	Business Unit GENFD	Requisition Date 05/10/2017
uploading supporting	Requisition ID NEXT	Status Open
documents such as		
	*Sort Method Comment Time Stamp	*Sort Sequence Ascending V Sort
quotes, agreements,	*Sort Method Comment Time Stamp	*Sort Sequence Ascending V Sort
etc.	Comments	Find View All First 🕚 1 of 1 🕑 Last
	Use Standard Comments	Comment Status Active
A		
If you remove the check from Send to Supplier, the comment		±€
	Send to Supplier Show at Receipt	
	Associated Document	
	Attachment	Attach View Delete Email
	From -> REQ GENFD-NEXT	
	OK Cancel Refresh	
Standard Comments		
are available by	Header Comments	
	Treader Comments	
selecting the Use		
Standard Comments	Business Unit GENFD	Requisition Date 05/10/2017
link.	Requisition ID NEXT	Status Open
	*Sort Method Comment Time Stamp	*Sort Sequence Ascending V Sort
	Comments	Find View All First 🕚 1 of 1 🕑 Last
	Use Standard Comments	Comment Status Active Inactivate +
		₽¢¢
	Send to Supplier Show at Receipt	
	Show at Voucher Associated Document	
		Attach View Delete Email
	Attachment	Attach View Delete Email
	From -> REQ GENFD-NEXT	
	OK Cancel Refresh	

COMMENTS AND ATTA	CHMENTS	
Use the to lookup the Comment Type and Comment ID.	Standard Comments Comments	Help
	*Action Copy Comment *Action Copy Comment ID Comment Type Comment ID *Effective Date 05/16/2017 *Status Active * Description Short Desc Comments Comments OK Cancel Refresh	

COMMENTS AND ATTACHMENTS			
File Attachments			
Support documents can be uploaded directly into PeopleSoft using the	Business Unit GENFD Requisition Date 05/10/2017 Requisition ID NEXT Status Open		
Attachment functionality.	*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort Comments Find View All First ④ 1 of 1 ④ Last		
Click the Attach pushbutton to add an attachment.	Use Standard Comments Comment Status Active Inactivate		
You can only attach one file per comment. To avoid having to create multiple comments, scan all supporting documents into one file prior to uploading.	Send to Supplier Show at Receipt Show at Voucher Associated Document Attachment Attach View Delete Email From -> REQ GENFD-NEXT OK Cancel Refresh		

COMMENTS AND AT	TACHMENTS
From here you can browse and upload a file. You can upload any file format.	File Attachment Help Upload Cancel
Depending on your browser, the File Attachment page may look different.	
	File Attachment
	Help Choose File No file chosen Upload Cancel
	File Attachment ×
	Help Browse No file selected. Upload Cancel

COMMENTS AND AT	TACHMENTS
When a File Attachment exists, the file name is displayed and the	Business Unit GENFD Requisition Date 04/20/2017 Requisition ID NEXT Status Open
View and Delete pushbuttons become active.	*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort Comments Find View All First 1 of 1 Last Use Standard Comments Comment Status Active Inactivate
active.	Send to Supplier Show at Receipt Show at Voucher
	Associated Document Attachment EXHIBIT_A_1.docx Attach View Delete Email From -> REQ GENFD-NEXT OK Cancel Refresh

Section 5 - Requisition Line Defaults

Requisition Lines can require different attributes. For instance, one line could be for equipment and the remaining lines for supplies. In this case, the equipment line will require an equipment budget and the appropriate Asset Profile ID. Since the majority of the line items are supplies, we can enter the supply budget on the Header Defaults page. This will apply the supply budget and category to all requisition lines. To apply the appropriate budget and Asset Profile ID for the equipment item, we can change the defaults on that Requisition line.

On The Requisition Line	
Access the Line	Requisition
Defaults by clicking the icon.	Busines Unit OENFD Status Opin Requisition ID NEXT Bodget Status 300 Child Negasition Name Copy From Eliter Processing
	V Header () Originator: Originatori: Originator: Originator: Originator: Originat
	Récuestion Defaulte Koz Commercial Carefordical Carefordi
	Line (7) Personalize Find Yeer Al (2) Rest M 1 of 1 Detains Imp Description Data (2) Rest M 1 of 1 Detains Imp Description Data (2) Rest M 1 of 1 Detains Description Data (2) Rest M 1 of 1 Description Step to Anoted Anote
	Ves Prituse Vesor "Gold More "
The Requisition Line Defaults provides access to chartfields, location and Asset Profile ID Click the Copy Header	Requisition Line Defaults Maintain Requisitions Defaults for Line 1 Requisition ID NEXT Rem BALANCE Metter Toledo 3021054 Line 1 Default Options Override Copy Header Default
Defaults link to bring in	SpeedChard Q. Distributions Personal(c)
the header default values and then make changes accordingly.	Dest Percent Account Fund Dept Program Class Project Location Business Unit Profile ID Dest Percent Account Fund Dept Program Class Project Location Business Unit Profile ID Dest Cancel Refresh
Click on the Personalize link to hide the fields you will not need.	
You will only need to perform this step once. The system will remember your preferences.	

LINE DEFAULTS

Click on the Copy Settings link at the	Distributions		_
bottom of the Personalize Column and Sort Order	Personalize Column and Sort	Order	
page.	To order columns or add fields to sort orde Frozen columns display under every tab.	er, highlight column name, then press the approp	priate button.
	Column Order	Sort Order	
	Tab Details (frozen) Dist (frozen) Percent GL Unit (hidden) Account Fund Dept Program Class PC Bus Unit (hidden) Project Activity (hidden) Affiliate (hidden) Budget Date (hidden) Location Floor # (hidden) Business Unit (hidden) Profile ID Tab Asset Information IN Unit Capitalize Cost Type Description	Hidden Frozen	Descending
Use the lookup icon to copy the LR template.			_
	Copy Settings		Help
	Copy Your Customization Settings		1
	Settings to Copy:	Q	
	OK Cancel		

LINE DEFAULTS
Select the LR REQ setting. Click OK twice to get back to the Requisition Defaults page. The page customization may not display immediately. Look Up Settings to Copy Help Setting Name begins with T Look Up Clear Cancel Basic Lookup Search Results View 100 First 1 of 1 Last Setting Name LR REQ

SECTION 6 - CATEGORICAL PROGRAMS

Categorical Programs, Grants or Special Projects require certification that funds are being expended appropriately. The Categorical Certification link on the Requisition Header opens a pop-up page for recording this information.

CERTIFYING CATEGO	DRICAL PURCHASES	
On the Requisition Header	Maintain Reguistions Requisition	
To document the criteria met by the purchase, click on the Categorical Certification link.	Business Unit CENFD Requisition ID NEXT Requisition Name Copy From *Requisition Date (Ad2002017 *Requisition Date (Ad2002017 *Requisition Date (Ad2002017 *Commenty Cate (USO Dollar Accounting Date (Ad2002017 Busine Commenty Cate (USO Dollar Account Summary 7: Date of Approvel Requisition Activities Freight/Shipping/Fee AmOnly	Status Open Budget Status Not Cirk's Status Biold From Further Processing Q. 0.00 LISTO
Enter the applicable information on the page.	Custom Fields for Requisition Header Date This purchase is in compliance with the requirements of: Program Director/Coordinator: Project/Grant Number: Program Goal/Objective: OK Cancel Refresh	

SECTION 7 - NOTIFICATIONS

Email notifications can be sent directly from the Maintain Requisitions page. The notification includes a link to the Requisition within PeopleSoft Financials. This notification can provide easy access to users that need to review and/or approve Requisitions.

NOTIFY	
From the Maintain Requisitions Page You can send an email by clicking the Notify pushbutton located on the bottom left of the page.	Approved By Date of Approval Requisition Defaults Requisition Activities Freight/Shipping/Fee AmtOnly Line @ Details Line Description Quantity 'UOM Category Price Merchandise Amount 1 0.0000 Q 0 0 0.0 View Printable Version *Go tot Save Notify @ Refresh
Use the Lookup Recipient link to select email recipients.	<form></form>

NOTIFY	
Enter the last name of the employee you wish to notify.	Send Notification
Click Search and select the action for the Recipient. (To, CC, Bcc).	Lookup Address Recipient Search Name: Dobbins Search
Click the Add to Recipient List pushbutton to add the email addresses to the Recipient List below.	Search Results Personalize Find View All First (1 of 1) Last To cc bcc Recipient Dobbins,Valerie J. DobbinV@losrios.edu W0002223 Add to Recipient List To: Dobbins,Valerie J./W0002223 CC: BCC: OK Cancel
Once you have your recipients identified, you can set the Priority, add a Subject, and enter a Message. Click OK to send the notification.	Workflow Notification Prove one and addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. The observe of the name. Color addresses The observe of the name. City optimizer: Priority: Priority: Priority: Priority: Priority: Priority: Priority: Priority: Priority: Priority: Priority: Priority:

PEOPLESOFT REQUISITIONS

NOTIFY	
The resulting email message contains a direct link to the	Frame Barmanight baran ska Tra & Ouders, Valent Ca: Gaget Regulation (1001091154 - Amerigan Tambér
 requisition. This email can be forwarded to the next user for review. The active link will forward with the message. 	Workflow Norfication Priority: 2-Medium Date Sent: 2017-04-13 Sent: To: Dobbins, Valene I,/W0002223 CC: Please click on the link below to access this transaction: https://tsorpweb.losnes.edu/2443/psp/tsorp/EMPLOYEE/ISBP/c/REQUISITION ITEMS.REQUISITIONS.GBI/Plage=REQ_EORM&BUSINESS_UNIT=GENEPB&REQ_ID=B002809154&Actoon=U
	Message Text: Hello Valerie, This requisition is for service at FLC. Please review. Thank you.

SECTION 8 - TRACKING ACTIVITIES

Requisition Activities can be tracked using the pop-up page accessed from the link on the Requisition Header.

REQUISITION ACTIVI	TIES				
On the Requisition Header	Maintain Requisitions				
neader	Requisition				
Click on the Requisition Activities		Business Unit GENFD Requisition ID NEXT Requisition Name	Inex State	Status Open Budget Status Not Chk'd	5
	* Header ?	Requisition Name	Copy From	Hold From F	urther Processing
link.	*Requester *Requisition Date 04/2 Origin [ON] *Corrency Code USI Accounting Date 04/2	L Q, Online D Dollar	Attention To:	٩	
	Approved By Date of Approved Requisition Activities	Add Comments Categorical Centication Freight/Shipping/Fee AmtOny	Amount Summary 🧟	0.00 1280	
Reviews and intermediate approvals can be tracked using Requisition Activities.	Activities Business Unit CENFD Requisition 0001009157	Requisition Date 0 Status C			
	ID Requisition Activities		Person	alize Find 💷 🗰 First 🛝	1-2 of 2 East
	Done Date Comm	nents	Signed Date User ID	Signed By	and a start
	1 😿 04/20/2017 Notifi	cation sent to Monica Pactol	84/20/2017 W0023322	Kathy Barnes-Liquori	* =
	2 3 04/20/2017 Revie OK Cancel Refres	www.and.approved	04702017 W0943793	Monical Pacial	

SECTION 9 - VIEWING THE COMPLETED REQUISITION

Viewing the Requisition in simple page format can be done by generating the requisition report. Using the View Printable Version link at the bottom left of the Requisition page will initiate the report.

VIEW THE REQUISIT	ION
On the Requisition page Click on the View Printable Version link.	Natrian Requisitions Regulations Building Bill Charling Building Bill Charling
You will see the report submitted for printing	Queued Process Name: PORQ010 Requisition Print SQR Process Instance: 1105826 Process Type: SQR Report

VIEW THE REQUISIT	ION	
When the process completes, a PDF of your requisition is displayed.	Requisition Supplier: HILLYARD 0000002517 Supplier: HILLYARD 0000002517 Business Unit: CENFD APPROVED Req ID SACRAMENTO CA 95834 Date Page 0/19/2017 1 United States Phone: (800) 755-3111 Phone: (800) 755-3111 Fax: (916) 569-4175 Caudia Castellon Requester Signature Ship To: RECEIVING Received Fignature	
	1919 SPANOS COURT SACRAMENTO CA 95825-3981 Entered By: CASTELLC 19-AFR-2017	
	Line-Schd Description Quantity UOM Price Extended Amt Due Date	
	1-1 HIL0081422 ARSENAL CARPET PRE-SPRAY 12 EA 21.13 253.56 1/2 GAL (#14)	I
	2-1 HIL0081522 ARSENAL CARPET SPOTTER 1/2 6 EA 21.31 127.86 GAL (#15)	
	Total Requisition Amount. 381.42	I
	CUTODIAL DEPT.	
	QUOTE# 100435024	I
	BU Acci Fd Org Prog Sub Proj Amount GENED 4500 11 DS.GS.WAIR 65300 00000 073M 381.42	

Section 10 – Requisitions for Specific Purchases

Different types of Requisitions require different set up to ensure the transaction moves through the PeopleSoft system efficiently. The examples that follow will provide pointers on the attributes and settings needed for different types of purchases. This section covers:

- Blanket Orders
- Equipment Orders
- Maintenance Agreements
- Prepaid Expenses
- Split budgets
- Future Dated Requisitions

BLANKET ORDER

Ship-To

The Ship-To should always be "NOTAX" for Blanket Orders. Select the applicable NOTAX ship to location code on the

Requisition Defaults page

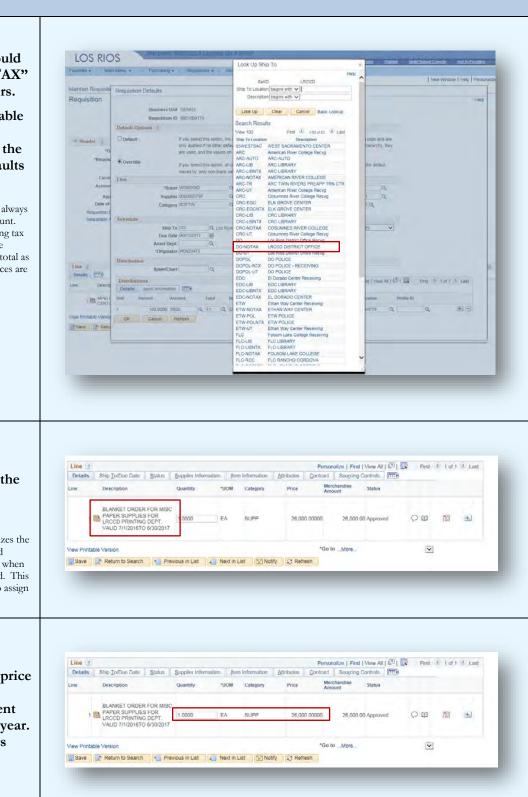
Blanket Orders are always set up as a flat amount. All charges, including tax and shipping will be deducted from the total as the individual invoices are paid.

Begin your description with the words "Blanket Order".

The system recognizes the word "Blanket" and notifies Purchasing when the PO is processed. This signals the Buyer to assign a "B" PO number.

Line Attributes

The quantity is always 1 and the price is the maximum amount to be spent during the fiscal year. The line is always "Amount Only."



BLANKET ORDER

Split Budgets If you require multiple budgets on a Blanket Order, create	Lines () Details Sho joCue Date galues jen information Amounts groups grid contract Becaving () Line ten Description PO dry "OOM Category Price Mandemic Solute TOOP - BLANKET ORDER FOR TOOP - BLANKET ORDER FOR TOOP - BLANKET ORDER FOR TOOP - BLANKET ORDER FOR
separate lines of the requisition.	1 Image: Address of the sec. 1,0000 EA SUPP Q 7,000 00, Approved Q M BL BL 2 Image: Address of the sec. Image: Addrese Address of the sec. Image: Address
Begin the description with the Project/Grant number of the budget to be used. Using a separate line for each budget ensures the appropriate budget gets	
charged.	
Comments Enter a comment on the Requisition Header Include the date the Blanket Order is in effect, the prior year Blanket PO Number and the names of personnel authorized to make purchases using this Blanket Order.	Header Comments Image: Set in the GENFD Requisition Date 01/31/2017 Requisition ID 00010090065 Status Approved Image: Set in the Method Comments Only Refrieve *Sort Method Comments Set Open PurceHASES FROM 02/01/17 THRU 06/30/17 Find View All FY16 Por #B116500 Imattivate Auto-Method Derror Show at Receipt Show at Noucher Imattivate Associated Document Attach Introducted Derror Show at Receipt Show at Receipt Show at Receipt OK Cancel Refresh Refresh

EQUIPMENT ORDERS

Defaults - Location Code

It is very important to be accurate when selecting the location code for equipment. This indicates to auditors where the equipment is located (building and room) during physical inventory.

The location code can be set on the Requisition Defaults or it can be set on the Line Defaults (see page 22)

Defaults - Profile ID

The profile ID is specific to various assets and is used to determine the useful life for depreciation purposes.

Different lines on a single requisition may require different Profile IDs. The Profile ID can be set on the Line Defaults for an individual Requisition Line. (see page 22)

Many of the Profile IDs will default from the Category Code for the Requisition Line.

Requisition Defaults								
Business Unit	GENFD		Requis	sition Date 02/09/2017				
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EQUIPMENT ORDERS

Description Enter an obvious Line ? Details description. Line Description MOU! Category Price More Supplier Name Ship To 1 COMPUTER, HP ELITE X2 1012 (18205UT#ABA) A good description 2.0000 EA 1,192.5000 2,385.00 CDW GOVERNMENT INC FLC Q O D M will tell anyone 2 WARRANTY, HP E-CARE PACK PICK-UP AND RETURN SERVICE - EXTENDED SERVICE AGREEMENT 5 YR (U7809E) 2.9000 118.00000 236.00 CDW GOVERNMENT INC FLC Q @ B B EA COMPU reading it what the item is within the first few words. Good Description The Purchasing staff n | Find | View All | [20] | [2] First 1 1/2 of 2 A L Details Ship [o/Due Date Status Supplier Information Rem Infor on Attributes Contract Sourcing Controls cannot verify the Quantity UOM Category Price Merchan int Amount Description Supplier Name appropriate ELECTRONIC HP CARE PACK H AND RETURN SERVICE WITH ACCIDENTAL DAMAGE P (CDW KCK PICK-UP 6.0000 EA 00 0 0 00 113 EQUIP 389 22000 2,335.32 CDW GOVERNMENT INC 1 Category/Profile ID if they are not sure HP ELITE X2 1012(\$1359] - [\$60 2 No savings] = [\$1299], [ENDS 01/31)] 00 Q D O D 10 EA 1.254.4900 6,272.45 CDW GOVERNMENT INC 5.0000 EQUIP exactly what the item is. Not So Good Description A An obvious description also assists auditors during physical inventory. Asset Tags? Another reason for Personalize | Find | View All | 🖾 | 🛄 First 🕚 1-10 of 12 🕑 Last Line 👔 Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls the obvious Merchandise Amount Line Description Quantity *UOM Category Price Status description is 1 1 303633 FLUKE NET CIQ-KIT. CABLE IQ ADVANCED IT KIT. INCLUDES HARD CASE, MULTIPLE TEST ACCESSORIES. FACTORY. determining if the 1.0000 EA FOUNTHER 1,615.7200 1.615.72 Open 0 00 1 +. item is taggable? 2 👪 461203 FLUKE NET LRAT-2000.LINKRUNNER AT 2000 NETWORK. AUTO-TESTER. FACTORY. 1.0000 0 🗰 1 +.. EQU:OTHER 1,595.0000 1,595.00 Open EA The Buyer must 463748. FLUKE NET OFP-100-QI/GLD. 3 BUNDLED OFP-100-QI WITH 1-YEAR TOLD 1.0000 1-2 WEEK LEAD TIME FROM FACTORY decide if the item can 2 +.. 15,040,760 0 0 EQU:OTHER 15,040.76 Open EA physically be tagged or if it is a product Taggable or not? that cannot feasibly be tagged with an adhesive label. If you know it is not practical to place an asset tag on the item you are requesting, please include an explanation in the comments

EQUIPMENT ORDERS											
Category											
Categories are specific to the type of	Line ? Details	Ship <u>T</u> o/Due Date <u>S</u> tatus <u>S</u> uppli	er Information	Item Inform	mation <u>A</u> ttril	Person butes <u>C</u> ontract	alize Find View Sourcing Con		First	1-4 of 4	🕑 Last
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For a list of Categories and	Line (?)					Person	alize Find View	AILI 💷 I 🔜	First	1-6 of 6	Last
Profile IDs see page 55.	Details	Ship To/Due Date Status Suppl	ier Information	Item Infor	mation Attrit		Sourcing Cont				
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				Not So	Good C	ategories					

MAINTENANCE AGREEMENTS

Recurring (monthly) payments

When entering a Requisition for routine/recurring payments, specific information needs to be included in the description.

- Equipment Serial Number
- Exact cost per month, including taxes
- Term of contract (effective dates)
 Prior Year PO
- Prior Year PO number

Annual Agreements

Include the description of services to be provided and the terms of the agreement. This can be done using the line description and/or the comments.

If you are paying up front for one year of service that crosses fiscal years, the current year cost is charged to a regular budget and the future expenses are charged to the 9220 account code. (see prepaid expenses page 40)

Line 🛞							Perso	onalize Find V	iew All 🖾 🔣	F	irst 🧃	1-4 of 4	E Las
Details	Ship To/Due Date	Status	Supplier Information	Item	Information	Attributes	Contrac	ct Sourcing C	controls				
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3 [400. \$127.49/MO (\$		1.0000	EA	FEES	1,529	.88000	1,529.88	Approved	P	m	19	+

Begin the description with the Serial Number of the equipment. This assists in matching the invoice to the correct PO line.

)etails	5	Ship To/Due Date Status S	upplier Information	Item I	nformation <u>Att</u>	tributes <u>C</u> ontr	act Sourcing C	ontrols (::::))			
•		Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
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MAINTENANCE AGREEMENTS

Multi-Year Agreements

The current year cost is charged to a 1

budget and Line	Description			Quantity	*UOM	Category	Price	Merchandise Amount	Status		
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	QUANTITY: 99999									V	
•											
. 2		ACLE DATABASE ENTER USER	PRISE EDITION	1.0000	EA	SERVI	67,021.950	67,021.95	5 Onen	0	
	- NONSTANDARD CSI#15482222 QUANTITY: 99999			1.0000		OL: (1)	07,021.0001	07,021.00	o opon	v	
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ment amount											
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PREPAID EXPENSES

Prepaying multiyear agreements

Occasionally you may need to create a requisition that covers multiple years of service. In this case there should be one line for each Fiscal Year of the agreement.

It is advised that you contact Accounting Operations prior to creating the requisition to ensure the future year payments can be processed without creating a new requisition each year.

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SPLIT BUDGETS

NOTE: EQUIPMENT PURCHASES CANNOT HAVE SPLIT BUDGETS

Equipment purchases are processed with a single budget to ensure the transaction processes through to the Fixed Asset System.

For non-equipment items, you can split the cost by percentage, quantity or specific dollar amount.

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SPLIT BUDGETS	
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FUTURE DATED RE	EQUISITIONS	
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next Fiscal Year. The Requisition Date dictates	Requisition Business Unit GENFD Requisition ID NEXT Requisition Name Copy From	Status Open Budget Status Not Chird ਾਨ
which Fiscal Year the transaction will be charged to.	Theader (2)	red By: Kathy Barnes-Liguori
Change the Requisition date to July 1.	*Currency Code USD Dollar Accounting Date 05/04/2017 3 Approved By Amount Summary ? Date of Approval	
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Requisition from a prior year, be sure to update the descriptions and comments.		

Section 11 - Copying Requisitions

You can copy a Requisition using the Copy From link on the header of the Requisition.

COPY A REQUISITION	
On the Requisition Header	Maintain Requisitions
Click on the Copy From link.	Requisition Dusiness Unit: GENFD Requisition ID: NEXT Budget Status: No: Chrid Requisition Name Copy From Header "Orginator: Orginator:
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COPY A REQUISITION

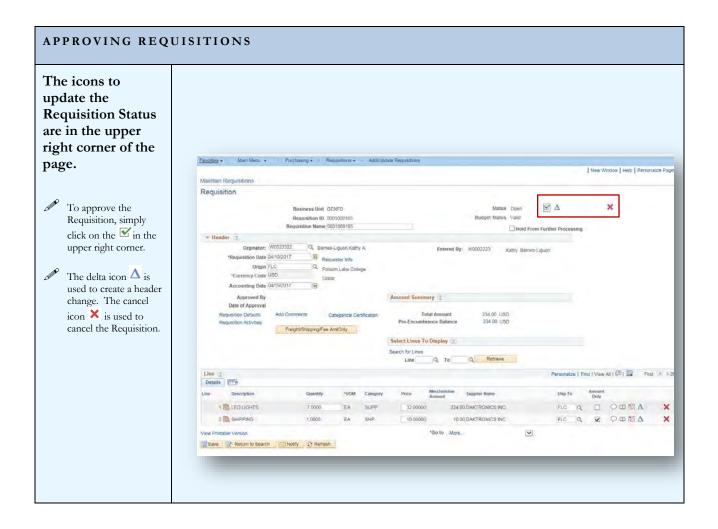
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Add the Originator and make necessary changes to defaults, descriptions, comments and attachments.	

Section 12 – Approving Requisitions

Approving the Requisition is the final step before the document is sourced to a Purchase Order. Only an Authorized Signer, that has appropriate security access, can approve the requisition. Approval can be done by accessing the requisition via a notification link or by searching for the requisition using specific search criteria.

APPROVING REQUISITIONS		
Using the notification link	To: Dobbins, Valerie Cc: Subject: Subject: Requisition 0001009165 DAKTRONICS	
Using the link within the notification email, you can go directly to the requisition without any menu navigation.	Workflow Notification Priority: 2-Medium Date Sent: 2017-05-09 Sent To: Dobbins,Valerie J./W0002223 cc:	
If you are not logged into PS Financials, the link will first take you to the log in page and then to the requisition.	Please click on the link below to access this transaction: https://fsprpweb.losrios.edu:2443/psp/fsprp/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL? Page=REQ_FORM&BUSINESS_UNIT=GENFD&REQ_ID=0001009165&Action=U Message Text: Hello Valerie, This requisition is ready for your review and approval. These are the replacement lamps we discussed. Kathy	

APPROVING REQU	ISITIONS
Search for a Requisition	
Requisition	Favorites + Main Menu + > Purchasing + > Requisitions + > Add/Update Requisitions
You can use the Add/Update Requisitions menu to search for a requisition.	Requisitions Use the following search to look for an existing Requisition. Find an Existing Value Add a New Value Search Criteria
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Under the Find an Existing Value tab, use a specific Requisition number or enter whatever search criteria you have.	Business Unit Requisition ID begins with Requisition Name begins with Requisition Status Origin begins with Requester Degins with Degins with </th
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The search by Requisition Status, Origin, and Budget Checking Status provides a list of Requisitions meeting the criteria.	Requester begins with Requester Name (begins with Budget Checking Header Status Viald Case Sensitive Limit the number of results to (up to 300): 300 Search Clear Basic Search Search Clear Basic Search Search Results View All First 1 1/2 of 10 Last
The search criteria can be saved by using the Save Search Criteria link.	Business Unit Requisition ID Requisition Name Requisition Status Origin Requester Requester Name Budget Checking Header Status Hold From Further Processing GENFD 0001009170 0001009170 Open FLC W00022322 Valerie Dobbins Valid N GENFD 0001009154 0001009155 Open FLC W0022322 Kathy Barnes-Liguori, Xathy A, Valid N GENFD 0001009154 0001009154 0001009154 Open FLC W0023322 Barnes-Liguori, Xathy A, Valid N
You may want to save a search for each Business Unit.	



Section 13 – Unapproving Requisitions

Unapproving the Requisition may be necessary from time to time. Occasionally the requisition may be set up in a manner that is not conducive to Accounts Payable or Asset Management. The Purchasing staff will make changes on the Purchase Order if possible, but sometimes it is necessary to start back at the beginning. Once a Requisition is unapproved, the person with Requisition Entry access will be able to make changes to the Requisition.

UNAPPROVING RE	QUISITIONS	
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Section 15 - Categories and Profile IDs

CATEGORIES AND PROFILE IDS			
Category Code	Description	Profile ID	
FURN	Furniture	FURN	
SUPP	Supplies		
SERVI	Services		
COMPU	Computer Equipment	COMPU	

CATEGORIES AND PROFILE IDS

CATEGORIES AND FRO	STILL IDS	
EQUIP	Miscellaneous Equipment	EQP:OTHER
VEHIC	Vehicle	VEHIC
SOFTW	Software	SOFTW
MEMBR	Membership	
RENTL	Rentals	
TRAVL	Travel	
FRT	FREIGHT	
FEES	FEES	
CMPAC	Computer Accessories	CMPAC
CPYPR	Copy/Printing/Duplicating Eq	CPYPT
РНОТО	Photography Equipment	EQP:PHOTO
PROP	Real Property	
SSI	Sole Source Justification	
VOIP	VOIP	
APPL	Appliances & Supplies	EQP:APPL
BLDIM	Buildings & Improvements	
BLDSUPP	Building Supplies & Materials	EQP:BLDIM
COMPMONT	Computer Monitor	COMPMONT
COMPRINT	Computer Printer	COMPPRINT
COMPSERVER	Computer Server	COMPSERVER
CONSULTSVC	Consulting Services	
COPIER	Copier	COPIER
ENTERTAIN	Entertainment, Misc.	
ART	Art	EQP:ART
ATHL	Athletic Equipment & Supplies	EOP:ATHL
AUDVIS	Audio Visual/Theatre/Equip⋑	EOP:AUDVIS
AUTO	Auto Equipment & Supplies	EQP:AUTO
COMM	Communication Equip & Supp	EQP:COMM
HORT	Horticulture/Landscape Equpmnt	EQP:HORT
OFFICE	Office Machines & Accessories	EQP:OFFICE
EOU:OTHER	Other Equipment	EQP:OTHER
РНОТО	Photography Equipment	EQP:PHOTO
PIANO	Piano Equipment & Supplies	EQP:PIANO
POLICE	Police Equipment/Supplies	EQP:POLICE
SCI	Science Lab Equipment & Supp	
FUEL	Fuel	
INSURE	Insurance	
LIBR	Library books	
MUSIC	Musical Instruments & Supplies	EQP:MUSIC
SACIM	Site Acquisition	
SIMPR	Site Improvements	
SURVCAM	Surveillance/Security Camera	SURVCAM
TOOLS	Tools	EQP:TOOLS
TRAIN	Training	
SHP	Shipping & Handling	
NETWORK	Network	NETWORK
SAN	Storage Area Network (SAN)	SAN
WAP	Wireless Access Point (WAP)	WAP
TABLETS	Tablets	TABLET

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