

How to Enter a Purchase Requisition

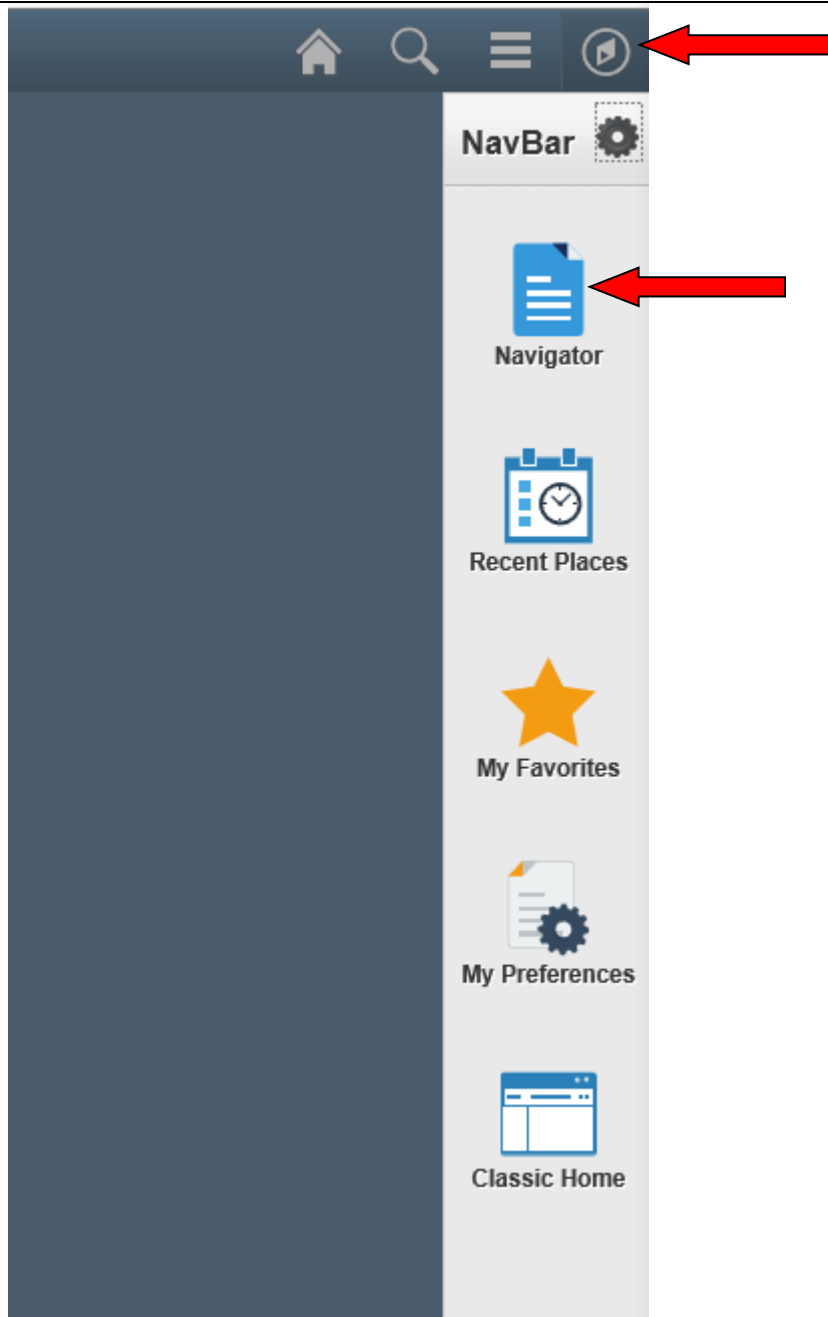
On the Cal Poly Portal click **CSU Portal-Financial Administration**

Pro Tip: Internet Explorer is the recommended web browser for optimal system function.

The screenshot shows the Cal Poly My Portal interface. At the top left is the Cal Poly logo. To its right is the text 'CAL POLY | My Portal'. Below this is a navigation bar with three tabs: 'Home' (selected), 'Money Matters', and 'Personal Info'. The main content area is divided into several sections. On the left is a 'My Apps' list with icons and text for: Email & Calendar, Cal Poly OneDrive, HR Administration, Student Administration, CSU Portal- Financial Administration (highlighted with a red arrow), PolyData Dashboards, Campus Wiki, Electronic Workflow, Technical Service Request, and Facilities Requests. To the right of 'My Apps' is a 'Directory Inform' section with a search bar and a 'Simple Search' link. Below that is a 'Weather' section for San Luis Obispo, CA, showing a sun icon and the word 'Currently'.

Click on the diamond-shaped NavBar icon at the top right of the homepage, then follow this path:

Navigator



Purchasing

NavBar: Navigator

- Accounts Payable >
- Accounts Receivable >
- Asset Management >
- Billing >
- General Ledger >
- Purchasing >
- Suppliers >

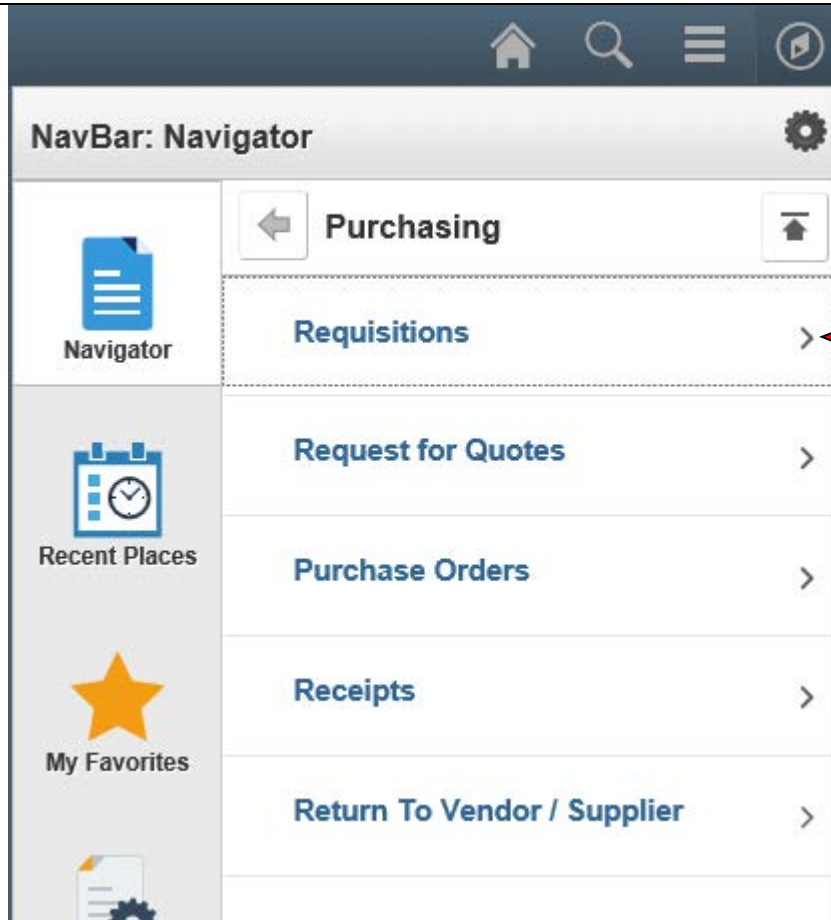
Navigator

Recent Places

My Favorites

My Preferences

Requisitions



Add/Update Requisitions

The screenshot shows a mobile application interface. At the top, there is a dark blue header bar with icons for home, search, menu, and a circular arrow. Below this is a light gray bar labeled "NavBar: Navigator" with a gear icon on the right. The main content area is a list of navigation items. On the left side of this list, there are three categories: "Navigator" (with a blue document icon), "Recent Places" (with a blue calendar icon), and "My Favorites" (with a yellow star icon). The list items are: "Requisitions" (with a back arrow icon on the left and a home icon on the right), "Reconcile Requisitions" (with a right-pointing chevron), "Review Requisition Information" (with a right-pointing chevron), "Reports" (with a right-pointing chevron), "Add/Update Requisitions" (with a red arrow pointing to it from the right), and "Requester's Workbench".

This is the **Add/Update Requisitions** page.

Pro Tip:

To find this page easily next time, use this drop down

Add To ▾

found at the top right of this screen and choose **Homepage** or **Favorites**.

On the **Add a New Value** tab click on **Add** (Do Not change the Business Unit or Requisition ID fields)

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Requisitions

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit 

Requisition ID

Add



[Find an Existing Value](#) | [Add a New Value](#)

Click **OK** through this message

Message

Default comment added for Ship To Code 0820. Verify on Ship to comments page. (10100,142)

The comment defaulted can be found in the Ship To Comments secondary page. To review the comments, click on the Ship To Comments hyperlink found under the Schedule page.

OK

This is the main requisition page.

Pro Tip: Use the **Personalize** hyperlink to show only what you need to see here. On the pop-up screen scroll down and click **Copy Settings**. Click the magnifying glass and choose **SLO_REQ_PERSONALIZATION** then click **OK** and then **OK** again. You will only have to do this once.

Back on the main requisition page click the **Requisition Defaults** hyperlink to begin entering the required information.

Maintain Requisitions

Requisition

Business Unit SLCMP
Requisition ID NEXT
Status Open
Budget Status Not Chk'd
Requisition Name Copy From Hold From Further Processing

Header

*Requester 15006137231 Paolucci, Jeanette
*Requisition Date 03/30/2016 Requirer Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults Add Comments
Requisition Activities

Amount Summary
Total Amount 0.00 USD

Add Items From
Purchasing Kit Catalog
Item Search Requirer Items

Line

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

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

OK Cancel Preview **Copy Settings** Share Settings Delete Settings

Copy Settings

Look Up Settings to Copy

Setting Name begins with

Look Up Clear Cancel

Search Results

View 100 First 1-3 of 3 Last

Setting Name
CHICO_REQ
EB REQ DASH_CUSTOM_HALE
SLO_REQ_PERSONALIZATION

Complete the highlighted fields using the magnifying glasses and the pop-up screens.

Pro Tips:

1. Your Buyer (Procurement Specialist) is easily found by typing **15** in the **Buyer begins with** field and then clicking **Look Up**.

2. When in doubt choose **No Vendor** in the **Supplier** field (it is the first one listed).

3. In the **Category** search, services begin with a 9 and all other numbers (1-8) designate a physical item.

4. Only enter a **Due Date** if a certain date is important.

Once this page is completed click **OK**

Requisition Defaults

Business Unit SLCMP
Requisition ID NEXT

Requisition Date 05/11/2018
Status Open

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 defaults are used, and the hierarchy is used. If default values already exist in the hierarchy, they are not overridden.
 Override If you select this option, the default values entered on this page override the default values found in the default hierarchy, only not the hierarchy.

Enter your designated Procurement Specialist here for fast assignment to the correct person.

Common Units of Measure are **LOT** or **EA**

Line

Buyer
Supplier
Category

Unit of Measure
Supplier Location
Supplier Lookup

Schedule

Ship To 0820 Distribution
Due Date
Ultimate Use Code
Attention To

Do not enter more than **four** letters or characters when searching for a Supplier

*Distribute By Quantity
*Liquidate By Amount
Ship Via UPSGROUND
Freight Terms DA

Distribution

SpeedChart

Distributions

Details Asset Information

You can also use the [Personalize](#) hyperlink to change the way the Distribution fields appear here. In the pop-up screen select Fund, Dept, etc. on the left side and use the up and down arrows to rearrange their order, then click OK.

Dist	Percent	GL Unit	Fund	Dept	Account	Program	Project	Class	Oper Unit
1		SLCMF							

OK Cancel Refresh

You **MUST** enter a Fund and Dept here. Account is optional and will default to 660003. If your funding source has an optional Program, Project or Class number, enter them here.

You will be back on the main requisition page.

After populating the fields highlighted in red, click **Refresh**. This will auto-populate the remaining fields.

Maintain Requisitions
Requisition

Business Unit SLCMP
Requisition ID NEXT

Status Open
Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 15006137231 Paolucci, Jeanette
*Requisition Date 03/30/2016 Requirer Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requirer Items

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"/>	0	0.00	Open

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

Save Notify Refresh Add

This is the minimum amount of information to click **Save** and obtain a **Requisition number**.

Pro Tip: The system times out often so it is important to save at this point.

Maintain Requisitions
Requisition

Business Unit SLCMP
Requisition ID NEXT

Status Open
Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 15006137231 Paolucci, Jeanette
*Requisition Date 03/30/2016 Requirer Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requirer Items

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"/>	0	0.00	Open

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

Save Notify Refresh Add

The word NEXT will be replaced with the requisition number. Requisition numbers begin with the number 1. For example - 1000015555. Please make note of your requisition number.

You can add more lines to the requisition by selecting the + at the far right side.

Maintain Requisitions

Requisition

Business Unit SLCMP
Requisition ID NEXT

Status Open
Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 15006137231 Paolucci, Jeanette
*Requisition Date 03/30/2016 Requisition Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 03/30/2016

Requisition Defaults Add Comments
Requisition Activities

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog
Item Search Requirer Items

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...

Save Notify Refresh Add

In the pop-up screen enter in the number of lines you would like to add then click **OK**.

calstate.edu needs some information

Script Prompt:

Enter number of rows to add:

OK Cancel

Pro Tip: Use a minimal number of lines, but enough to be clear and also reflect the vendor's quote. Use separate lines for unique types of items such as **goods** vs. **services** vs. **shipping**.

You do not need to add a line for sales tax. Sales tax will be reviewed and assigned by your Procurement Specialist to applicable lines.

The lines will be added. Continue populating the required fields and clicking **Refresh** to auto-populate the remaining fields.

When finished adding lines, click **Save**.

The screenshot shows a requisition line item table with columns: Line, Description, Quantity, *UOM, Category, Price, Merchandise Amount, and Status. Two lines are visible, both with a quantity of 0.0000 and a status of 'Open'. Below the table, there are buttons for 'Save', 'Notify', and 'Refresh'. Two red arrows point to the 'Save' and 'Refresh' buttons. A text box in the center reads: 'For a line item with a different category type than entered in Requisition Defaults, change the category number on that specific line at this time.'

Click on the **Add Comments** hyperlink to attach backup paperwork.

Pro Tips:
1. Backup paperwork includes items such as: the vendor's quote, other quotes you received for comparison, an approved building permit, or new vendor form/W-9.

2. Do not use line comments.

The screenshot shows the 'Maintain Requisitions' page. The 'Requisition' header includes fields for Business Unit (SLCMP), Requisition ID (NEXT), Status (Open), and Budget Status (Not Chk'd). Below this is the 'Header' section with fields for *Requester (15006137231), *Requisition Date (03/30/2016), Origin (ONL), *Currency Code (USD), and Accounting Date (03/30/2016). A red box highlights the 'Add Comments' button. Below the header is an 'Amount Summary' section showing a Total Amount of 0.00 USD. At the bottom, there is a table with one line item. A red circle with a slash is over the 'Add Comments' icon in the table's action column. Buttons for 'Save', 'Notify', and 'Refresh' are at the bottom left, and 'Add' and 'Update/Display' are at the bottom right.

Use the blank space to type anything you would like your Procurement Specialist to know about your purchase.

Pro Tips:

1. This is a great location for the vendor contact name, email address and phone number.

2. It is not necessary to select the Send/Show checkboxes.

Click **Attach** to add your backup.

Header Comments

Business Unit SLCMP Requisition Date 03/30/2016
 Requisition ID NEXT Status Open

*Sort Method *Sort Sequence

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment	Attach	View	Delete	Email
From -> REQ SLCMP-NEXT	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/> Email

Click **Browse** first to find your file and once the file is selected, click **Upload**.

File Attachment

If you have another file to attach Click the + at the right side to add another comment box.

Pro Tip:
If **View All** displays as a hyperlink, there is more than one comment box. Click the **View All** hyperlink to show all boxes.

If you are finished attaching all backup documentation, click **OK**.

Header Comments

Business Unit SLCMP Requisition Date 03/30/2016
Requisition ID NEXT Status Open

*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 +

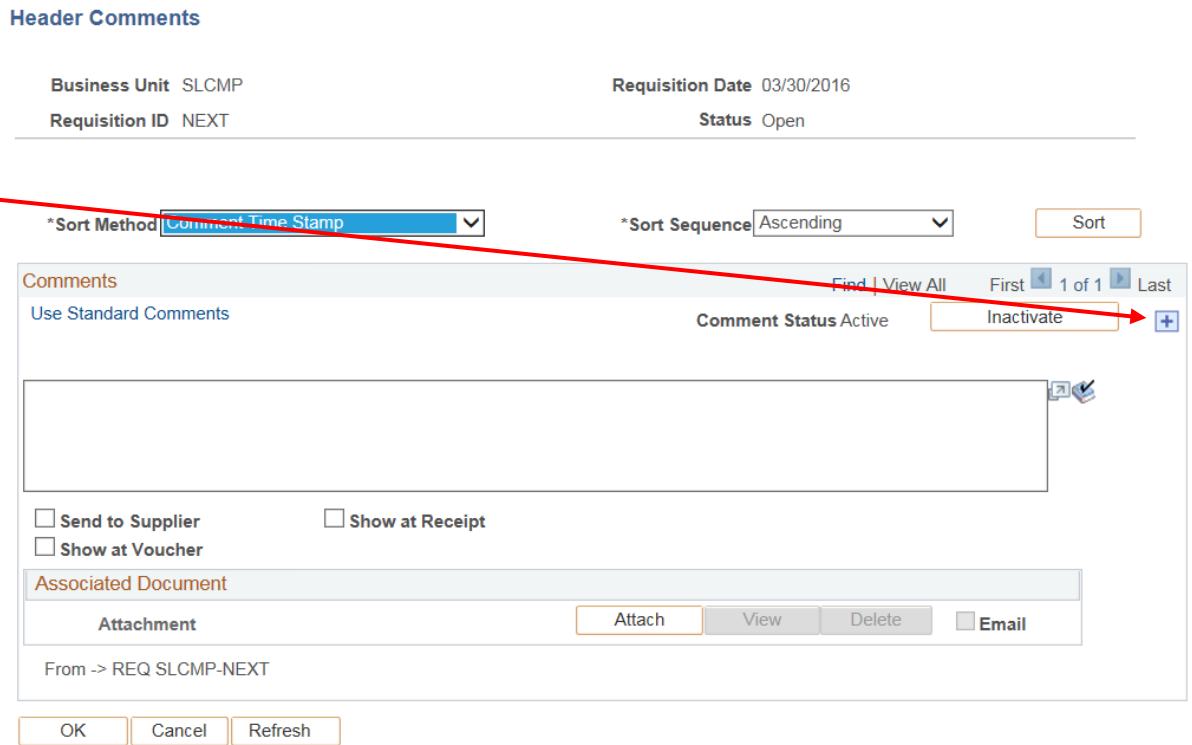
Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> REQ SLCMP-NEXT

OK Cancel Refresh



You will now be back on the main requisition page. Click **Save**.

Your requisition is complete.

Pro Tip:

If you need to update something specific later in the requisition, select the **Hold From Further Processing** checkbox. It will not be made available to your approving official and you will be able to come back and make the update. Once you are finished with the update, unselect **Hold From Further Processing** and click **Save**. The requisition will now be available to your approving official.

Maintain Requisitions

Requisition

Business Unit SLCMP Status Open
 Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 15006137231 Paolucci, Jeanette
 *Requisition Date 03/30/2016 Requisition Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 03/30/2016

Requisition Defaults Add Comments Amount Summary ?
 Requisition Activities

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog
 Item Search Requester Items

Line ?

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		0.0000			0	0.00	Open

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

Save Notify Refresh Add

Communicate the requisition number to your approving official with your approval request. They will not receive an automatic notification.

Your approving official must **approve and budget check** the requisition before your Procurement Specialist can see it in their workflow.

If you do not know who your approving official is call Valerie Maijala at 6-1187.

Please allow approximately 10 days for processing.

Call your designated Procurement Specialist or 6-2232 with any questions.

Status Approved
Budget Status Valid
 Hold From

When the requisition is fully approved the Status will show as **Approved** and the Budget Status as **Valid**.

Status Open
Budget Status Not Chk'd
 Hold From Further Processing

If the requisition shows Status **Open** and/or Budget Status **Not Chk'd**, it is not fully approved by the approving official.

requisition name [Copy From](#)

header ?

*Requester 15010982071 Winterfeldt, Michele L
*Requisition Date 05/11/2018 Requester Info
Origin ONL Online Entry
*Currency Code USD Dollar
Accounting Date 05/11/2018
[Requisition Defaults](#) [Add Comments](#)
[Requisition Activities](#)

If you or your approving official receive an error message when accessing a requisition, you might need to update the Accounting Date on the main page before proceeding. The Accounting Date must always be a date within the current month.

Bonus Pro Tips:

1. Requisition numbers start with a 1, and Purchase Order numbers start with a 2.

2. Once a requisition is saved, you can search for it from the **Add/Update Requisitions** page on the **Find an Existing Value** tab. Search by **Requester Name** (last name), or by **Requisition ID**. To avoid typing all of the digits of the requisition number in the **Requisition ID** field, type a % and only the **last 5 digits** of the requisition number. This is also where your approving official will search to approve your requisition.

Requisition

1000013576

Purchase Order

2000015966



Requisitions

Use the following search to look for an existing Requisition.

▼ **Search Criteria**

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

[Find an Existing Value](#) | [Add a New Value](#)

3. You can also search for a requisition in **Requisition Inquiry** using this path on the NavBar: **Purchasing, Requisitions, Review Requisition Information, Requisitions.**

Searchable fields include: **Requisition ID, Requester Name, or Supplier Name.**

Please note, this is not where your approving official approves your requisition. It is for inquiries only and contains very limited information.

ORACLE Navigator Search

Requisition Inquiry

Business Unit

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID [Supplier Lookup](#)

Supplier ID [Supplier Details](#)

Item SetID

Item Description
254 characters remaining

Department

To Req

Origin

To

Supplier Name

Item ID

Direct Ship


4. To cancel a requisition, go to **Add/Update Requisitions** and search for it on the **Find an Existing Value** tab. On the main requisition page, click on the red **X** in the upper right-hand corner and then click **Yes** at the pop-up message.

You may not have the ability to cancel the requisition if your approving official has accessed or approved the requisition.

If your approving official is also unable to cancel the requisition, please request assistance from your designated Procurement Specialist.

Maintain Requisitions

Requisition

Business Unit SLCMP Status Open 
 Requisition ID 1000013851 Budget Status Not Chk'd
 Requisition Name 1000013851 Hold From Further Processing

Header

*Requester 15010982071 Winterfeldt, Michele L
 *Requisition Date 05/14/2018 Requester Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 05/14/2018

Requisition Defaults Add Comments
 Requisition Activities
 Document Status



Amount Summary

Total Amount 50.00 USD

Add Items From **Select Lines To Display**

Purchasing Kit Catalog Search for Lines
 Item Search Requester Items

Line To Retrieve

Line Personalize | Find | View All |   F

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	TEST	1.0000	LOT	96200	50.00000	50.00	Open

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

Save Return to Search Notify Refresh

Message

Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

5. To update the chartfield on a specific requisition line, click the **Schedule** icon on the main requisition page for the line you want to update. On the **Schedule** page click the **Distribution** icon. Make any updates to the chartfield on the **Distributions** page. This only affects the chartfield for the selected line item.

Maintain Requisitions

Requisition

Business Unit SLCMP Status Open
 Requisition ID NEXT Budget Status Not Chk'd
 Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester 15010982071 Winterfeldt, Michele L
 *Requisition Date 05/14/2018 Requirer Info
 Origin ONL Online Entry
 *Currency Code USD Dollar
 Accounting Date 05/14/2018

Requisition Defaults Add Comments
 Requisition Activities

Amount Summary ?

Total Amount 5,000.00 USD

Add Items From ?

Purchasing Kit Catalog
 Item Search Requirer Items

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

Line	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	test	1.0000	LOT	96200	5,000.00000	5,000.00	Open

View Printable Version

*Go to ...More...

Save Notify Refresh

Add

Maintain Requisitions

Schedule

Business Unit SLCMP Requisition Date 05/14/2018
 Requisition ID NEXT Status Open

Return to Main Page

Line Find | View All | First 1 of 1 Last

Line	Item	test	Quantity	1.0000	Batch Lot	Merchandise Amt	5,000.00 USD
------	------	------	----------	--------	-----------	-----------------	--------------

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

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	9820	1.0000	5,000.00000	5,000.00		Winterfeldt, Mich	Active

Add/Edit Comments

Save Notify Refresh

Add Update/Display

Maintain Requisitions

Distribution

Requisition ID: NEXT

Line	Item	test	Quantity	1.0000	1.0000	5,000.00	5,000.00 USD
Schedule 1	Ship To 0820	Dist Svc	Quantity	1.0000	1.0000	5,000.00	5,000.00 USD

Distributions

Chartfield	Details	Account Information	Budget Information	GL Unit	Fund	Dept	Account	Program	Project	Class	Open Unit	Product	Altitude	Fund Altitude
1	Open	100 0800	1.0000	5,000.00	SLCMP		660803							

OK Cancel Refresh

Use the **Personalize** hyperlink on this page to rearrange the order of fields here.

6. To split a requisition line amount using two or more chartfields, follow the directions from tip #5 on the previous page. On the **Distributions** page, use the + at the far right of the screen to add one or more rows at the prompt. Then add the other chartfield(s) you would like to use.

If you would like to split by a dollar amount rather than a percentage, click on the **Distribute By** drop down. Change from **Quantity** to **Amount**. Adjust the **Merchandise Amount** fields to reflect the desired split.

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

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

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Script Prompt: OK

Enter number of rows to add: Cancel

Line 1 Status Active
Schedule 1

Ship To 0820 Dist Svcs Quantity 1.0000 LOT

*Distribute By **Quantity** Open Quantity 1.0000

*Liquidate By Amount Merchandise Amt 5,000.00 USD

SpeedChart Multi-SpeedCharts

Distributions

Chartfields	Details	Asset Information	Budget Information					
Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Fund	Dept	Account
1	Open	100.0000	1.0000	5,000.00	SLCMF			660003
2	Open		0.0000	0.00	SLCMF			

OK Cancel Refresh

Distribution

Requisition ID NEXT Item test

Line 1 Status Active

Schedule 1

Ship To 0820 Dist Svcs Quantity 1.0000 LOT

*Distribute By **Amount** Open Amount 5,000.000

*Liquidate By Amount Merchandise Amt 5,000.00 USD

SpeedChart Multi-SpeedCharts

Distributions

Chartfields	Details	Asset Information	Budget Information					
Distrib	Status	Percent	Merchandise Amount	GL Unit	Fund	Dept	Account	Progr
1	Open	100.0000	5,000.00	SLCMF			660003	
2	Open		0.00	SLCMF				

OK Cancel Refresh