

Create a Requisition

Follow the instructions below to create, save and budget check a requisition:

1. **Navigation: Purchasing > Requisitions > Add/Update Requisitions**
2. Enter the Business Unit code or ensure the correct Business Unit code is entered.
3. Click Add.

The screenshot shows the 'Requisitions' page. On the left is a 'Menu' sidebar with 'Purchasing' expanded to show 'Requisitions', 'Reconcile Requisitions', 'Add/Update Requisitions', 'Budget Check', and 'Commitment Control'. The 'Add/Update Requisitions' option is highlighted. The main content area has a 'Requisitions' title and two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs, there is a 'Business Unit' field with '50802' entered and a magnifying glass icon. Below that is a 'Requisition ID' field with 'NEXT' entered. At the bottom, there is a yellow 'Add' button circled in red. Below the 'Add' button are two links: 'Find an Existing Value' and 'Add a New Value'.

4. The Maintain Requisitions - Requisition page displays.

The screenshot shows the 'Maintain Requisitions - Requisition' page. The top header includes the City Colleges of Chicago logo, 'F S89 TRN', and a 'Home' link. The left sidebar shows the 'Menu' with 'Add/Update Requisitions' highlighted. The main content area has a 'Requisition' title and the following information: Business Unit: 50801, Status: Pending, Requisition ID: NEXT, Budget Status: Not Chk'd. Below this is a 'Header' section with fields for *Requester (AALLEN56), *Requisition Date (04/03/2013), *Origin (1IT), *Currency Code (USD), and *Accounting Date (04/03/2013). There is also an 'Amount Summary' section showing a Total Amount of 0.00 USD. At the bottom, there is a table with one line item. The table has columns for Line, Item, Description, Quantity, *UOM, Category, Price, Amount, and Status. The first row shows Line 1, Item 1, Description, Quantity 0.0000, *UOM, Category, Price 0, Amount, and Status Pending. Below the table are buttons for 'Save', 'Refresh', 'Add', and 'Update/Display'.

5. Click the magnifying glass next to the Origin.

- Select the correct Origin code or ensure the correct Origin code is entered. The Item list is tied to the Origin code so you will see only the items for the Origin code selected here.

Look Up Origin

SetID: 50801

Origin: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-24 of 24 Last

Origin	Description
1AF	Arts/Bio Sciences Academic Spt
1AC	Academic Supplies
1AE	Athletic supplies and Equip
1AL	Dean of ALSP GED
1AQ	Advertising Promotional outrea
1BS	Bookstore,cafeteria and vendin
1CE	Continuing Education
1CP	Dean of Career Programs
1CR	Career Programs Grants
1DW	Dawson
1ET	Employee Travel
1FC	Facilities Origin
1GR	Reprographics
1IN	VP of Instruction
1IS	Instructional Supplies
1IT	Office of Information Tech
1ME	Memberships
1OT	Other
1PS	Presidents Office
1SC	Security
1SR	Student related purchases
1SS	Student Services
1VP	Office of the Vice President

- Click the Requisition Defaults link.

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending

Requisition ID: NEXT Budget Status: Not Chk'd

Header

*Requester: AALLEN56 Alfred L Allen - KKC [Requisition Defaults](#) [Add Comments](#)

Requisition Date: 04/08/2013

*Origin: 1IT Office of Information Tech

*Currency Code: USD Dollar

Accounting Date: 04/08/2013

Amount Summary

Total Amount: 0.00 USD

Add Items From

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1			0.0000			0		Pending

View Printable Version

Save Refresh Add

- Click the magnifying glass next to Vendor.

9. Enter the Short Vendor Name to search for the Vendor.
10. Click the Look Up button.

Look Up Vendor

SetID: CCCGO

Vendor ID:

Short Vendor Name: begins with

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1 of 1 Last

Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID
0000028098	GUYBROWNMA-001	GUY BROWN MANAGEMENT LLC.	(blank)	(blank)	(blank)

11. Select the Vendor ID.
12. Select “Quantity” or “Amount” in the Distribute by field or ensure the correct field is entered. Indicate whether the item will be received by Goods or Services (goods by quantity and services by amount).
13. Enter the budget (chartfield) information (Account will be determined by the item code chosen).
14. Click OK.

The Maintain Requisitions – Requisition page displays.

Maintain Requisitions

Requisition Defaults

Business Unit: 50801 Requisition Date: 04/08/2013

Requisition ID: NEXT Status: Pending

Header

Buyer:

Unit of Measure:

Vendor: 0000028098 GUY BROWN MANAGEMENT LLC. Location: 01

[Vendor Lookup](#)

Item Defaults

*Distribute by:

Distributions

Customize Find View All First 1 of 1 Last

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Budget Date	Location
1		CCCGC		05501	1070100	70000	00000	CCCGC	0000000	04/08/2013	1KENKING

OK Cancel Refresh

15. Click the magnifying glass next to the Item.
16. Enter a Description of the item to be purchased.
17. Click Look Up button.

Look Up Item

SetID: CCCGO

Item ID: begins with

Category: begins with

Description: begins with monitor

Account: begins with

Physical Nature: =

Look Up Clear Cancel [Basic Lookup](#)

Search Results

View All First 1-2 of 2 Last

Item ID	Category	Category ID	Description	Account	Physical Nature
204-60	EQUIP < 25K	00156	Monitors, Color and Monochrome	549200	Goods
206-61	EQUIP < 25K	00156	Monitors, Color and Monochrome	549200	Goods

18. Select the Item ID that is the closest match to the item of purchase.
The Maintain Requisitions – Requisitions page displays.

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending
 Requisition ID: NEXT Budget Status: Not Chk'd

Header

*Requester: AALLEN56 Alfred L Allen - KKC [Requisition Defaults](#)
[Add Comments](#)

Requisition Date: 04/08/2013

*Origin: 1IT Office of Information Tech

*Currency Code: USD Dollar

Accounting Date: 04/08/2013

Add Items From

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1	204-60	Monitors, Color and Monochrome	0.0000	EA	EQUIP_<_25K	0		Pending

[View Printable Version](#)

Save Refresh Add Update/Display

- 19. Enter the Quantity for the item entered.**
- 20. Enter the Price.**
- 21. Click the Line Comments icon.**

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending
 Requisition ID: NEXT Budget Status: Not Chk'd

Header

*Requester: AALLEN56 Alfred L Allen - KKC [Add Comments](#)

Requisition Date: 04/03/2013

*Origin: 1IT Office of Information Tech

*Currency Code: USD Dollar

Accounting Date: 04/03/2013

Amount Summary

Total Amount: 0.00 USD

Add Items From

Line	Item	Description	Quantity	*UOM	Category	Price	Amount	Status
1	204-60	Monitors, Color and Monochrome	1.0	EA	EQUIP_<_25K	120.00		Pending

22. Enter a comment about what the item of purchase is.
23. Check the boxes for Send to Vendor, Shown at Receipt and Shown at Voucher.
24. Click the Attach button to attach any relevant information for the requisition. See the instructions, "Attaching a Document to a Requisition.pdf" to learn how to attach a document to a requisition.
25. Click OK.

The Maintain Requisitions – Requisition main page displays.

Line Comments

Business Unit: 50800 Requisition Date: 03/08/2012
 Requisition ID: NEXT Status: Pending Line: 1

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending [Sort](#)

Comments [Find](#) | [View All](#) First 1 of 1 Last

[Copy Standard Comments](#) [Copy Item Specs](#) Comment Status: Active [Inactivate](#)

paper clips for the chancellor

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment [Attach](#) [View](#) [Delete](#) Email

From -> REQ 50800-NEXT

[OK](#) [Cancel](#) [Refresh](#)

26. Click the Add Comments link to add header comments (optional). These comments will apply to the entire purchase.

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending
Requisition ID: NEXT Budget Status: Not Chkd

Header

*Requester: ALLEN56 Alfred L Allen - KKC [Requisition Defaults](#)
[Add Comments](#)

Requisition Date: 04/10/2013

*Origin: 1IT Office of Information Tech

*Currency Code: USD Dollar

Accounting Date: 04/10/2013

- 27. Enter a comment about the purchase.
- 28. Check the boxes for Send to Vendor, Shown at Receipt and Shown at Voucher.
- 29. Click the Attach button to attach any relevant information for the requisition. See the instructions, "Attaching a Document to a Requisition.pdf" to learn how to attach a document to a requisition.
- 30. Click OK.

The Maintain Requisitions – Requisition main page displays.

Header Comments

Business Unit: 50801 Requisition Date: 04/10/2013
Requisition ID: NEXT Status: Pending

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

Comments Find | View All First 1 of 1 Last

[Copy Standard Comments](#) Comment Status: Active Inactivate +

Test header comments

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

Attachment	PeopleSoft_Ent_logo.gif	Attach	View	Delete	Email
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From -> REQ 50801-NEXT

OK Cancel Refresh

- 31. Click Save.
- 32. Click the Budget Check icon.

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending
Requisition ID: 0000024900 Budget Status: Not Chkd

Header
*Requester: ALLEN56 Alfred L Allen - KKC
Requisition Date: 04/03/2013
*Origin: 1IT Office of Information Tech
*Currency Code: USD Dollar
Accounting Date: 04/03/2013
Amount Summary
Total Amount: 120.00 USD

Line: [] To: [] Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1	204-60	Monitors, Color and Monochrome	1.0000	EA	EQUIP_<_25K	120.00000	120.00	Pending

[View Printable Version](#) [Delete Requisition](#)

Save Refresh

Add Update/Display

33. The Budget Status should be Valid.

A pop-up box will also display that the requisition has been routed to workflow for approval.

Maintain Requisitions

Requisition

Business Unit: 50801 Status: Pending
Requisition ID: 0000024900 Budget Status: Valid

Header
Requester: AALLEN56 Alfred L Allen - KKC
Requisition Date: 04/03/2013
Origin: 1IT Office of Information Tech
Currency Code: USD Dollar
Accounting Date: 04/03/2013
Requisition Defaults
Add Comments
Requisition Activities
Document Status
Amount Summary
Total Amount: 120.00 USD

Add Items From: Purchasing Kit, Catalog, Item Search, Requirer Items

Select Lines To Display: Line: [] To: [] Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Amount	Status
1	204-60	Monitors, Color and Monochrome	1.0000	EA	EQUIP_<_25K	120.00000	120.00	Pending

[View Printable Version](#)

Go to: ...More...

Save Refresh

Add Update/Display