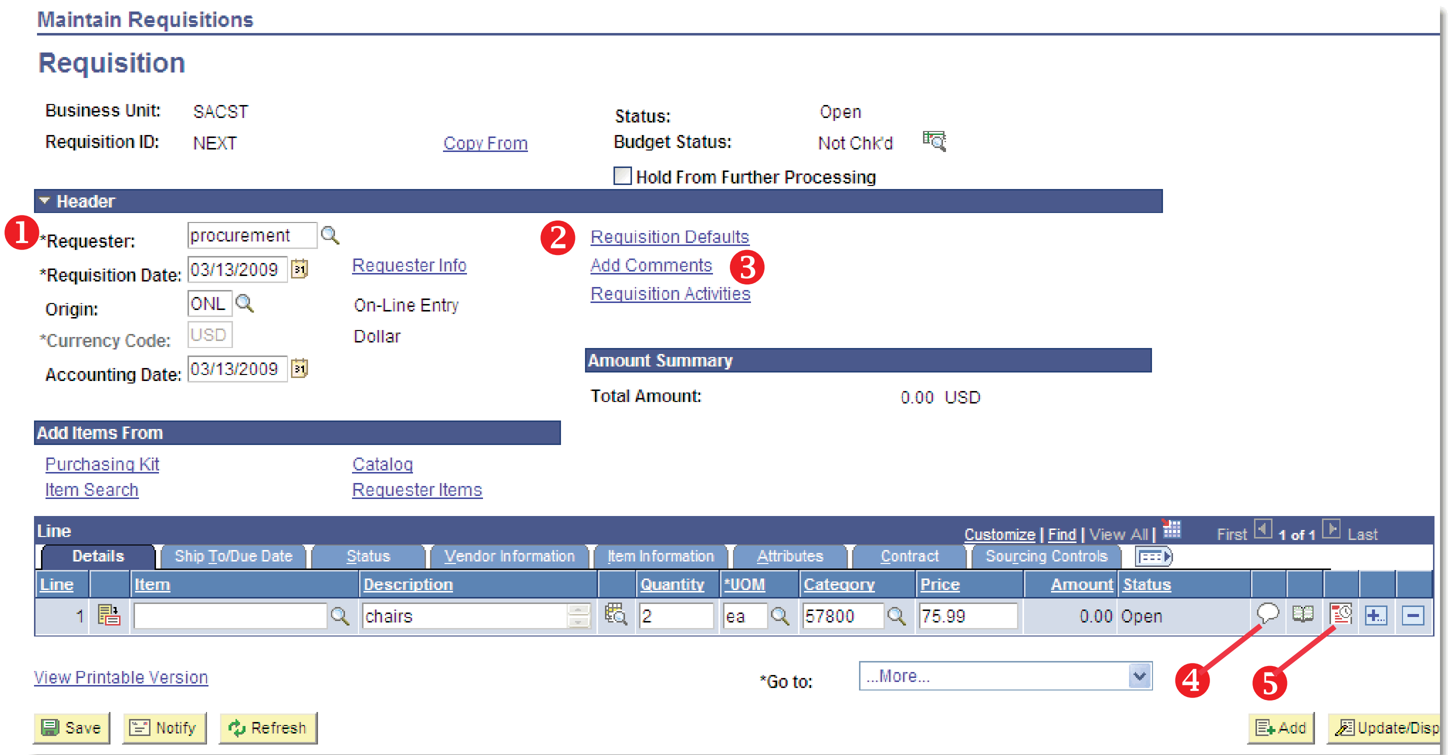
CMS Finance 9.0 - Creating a Requisition
8.4 vs 9.0 Comparison

This document is intended to be a quick visual guide to the new screen layouts for creating a requisition in Finance 9.0. For complete instructions on how to create requisitions, please see the training manuals available on the CMS Training web site.

Navigation

From the PeopleSoft Menu: Purchasing > Requisitions > Add/Update Requisitions

Maintain Requisitions Screen



1. Requestor: Will populate if user has only one requestor associated with the user ID. If it does not populate, click the search icon and select a requester from the list.

2. Requisition Defaults link: previously called Header Defaults. This link will take the user to the Requisition Defaults page.

3. Add Comments link: previously called Header Comments. Allows user to enter comments that pertain to the entire requisition. These comments will print on the requisition. The comments page includes a new spell check feature.

4. Line Coments Icon: Allows the user to enter comments that pertain to a specific line item.

5. Schedule Icon: Links to the Schedule Page.

> To Create a New Requisition
> Step 1: Enter Requester
> Step 2: Enter Line information such as Description, Quantity, UOM, etc.
> Step 3: Select the Requisition Defaults Link

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Maintain Requisitions

Requisition Defaults

Business Unit:	SACST	Requisition Date:	03/13/2009
Requisition ID:	NEXT	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 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.

Line

Buyer:
Unit of Measure:
❶ Vendor: 0000000001 OFFICE PLANNING GROUP
Vendor Location: RANCH
Category:
Vendor Lookup

Schedule

Ship To:
*Distribute by: Quantity ❷
Due Date:
*Liquidate by: Quantity
Ultimate Use Code:

Distribution

SpeedChart:

Distributions — Customize | Find | View All | First 1 of 1 Last

Details ❸

Dist	Percent	Account	Fund	Dept	Class	Category	Location	Business Unit	Description
1									

OK Cancel Refresh

1. Vendor Field: Enter Vendor name. Use the search icon to select a Vendor from the available list.

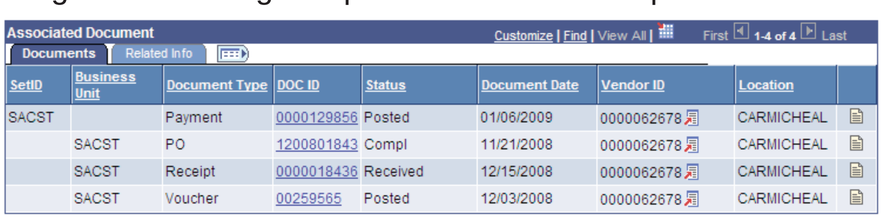
2. Distribute by: Select from the drop down menu: “Quanitiy” for merchandise or “Amount” for services.

3. Details Tab: Enter chartstring information such as Account, Fund Dept ID and Category.

> Step 4: Select a Vendor
> Step 5: Select the Distribute by: value (Quantity or Amount)
> Step 6: Enter Chartstring information
> Step 7: Click OK

Document Status Page: Purchasing>Requisitions>Review Requisition Information>Document Status

New Feature



Associated Document — Customize | Find | View All | First 1-4 of 4 Last

Documents | Related Info

SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location
SACST		Payment	0000129856	Posted	01/06/2009	0000062678	CARMICHEAL
	SACST	PO	1200801843	Compl	11/21/2008	0000062678	CARMICHEAL
	SACST	Receipt	0000018436	Received	12/15/2008	0000062678	CARMICHEAL
	SACST	Voucher	00259565	Posted	12/03/2008	0000062678	CARMICHEAL

Support Information

For more information on creating Requisitions, please visit the CMS website training pages www.csus.edu/irt/acs/services/cms/training/index.stm. For questions, contact the CMS Help Desk at 278-2670 or cmshelpdesk@csus.edu.