Section 1 Create Requisitions using Requisition Defaults

When creating a requisition with multiple lines using the same Chartstring information, it is best to enter Requisitions using the requisition defaults. Setting the defaults before entering each line will save time and reduce errors.

1. Log in to My Sac State with your SacLink user name and password https://www.csus.edu

2. From the Faculty/Staff Related Links page click on the CFS Finance Access link.
3. The Oracle menu page will display. Click on the diamond-shaped NavBar icon at the top right of the homepage.

![Oracle Menu Page](image)

4. Follow the following path. Navigator>Purchasing>Requisitions>Add/Update Requisitions

5. The Add a New Value screen will display. The business unit will default to SACST and the Requisition ID will default to NEXT. Click the Add button.

If you are using a different Business Unit click on the to see the other options.

![Add a New Value Screen](image)
6. On the Maintain Requisitions screen, the **Status**: displays “Open” and **Budget Status**: is “Not Chk’d”.

7. The **Requester** field will default according to your log in information or security settings. If it does not, click on the search icon to select a Requester from your list of available requesters.

8. Click the **Requisition Defaults** link shown above.
The Requisition Defaults screen, shown below, is used to select the supplier and to enter default Chartstring information.

9. Select **Override Default Options**

10. Select a supplier by clicking the search icon next to the **Supplier** field (previously known as “Vendor”) to obtain a list of available suppliers. You can search by Supplier ID or by Short Supplier Name. **If the desired supplier is not in the list, leave this field blank and note the supplier name, address and other related information in the Comments section.**

11. The **Distribute By** field will default to **Quantity**. Leave as is if the requisition is for a commodity. Change it to **Amount** if the requisition is for a service.

12. The **Distributions** section will default to the **Details** tab.

   If you are using a different Business Unit click on the search icon to see the other options

13. Enter the chartstring information. Account, Fund, Dept. Click OK.
The Maintain Requisition screen will display again. The next step is to enter the details for each line.

The line section of the screen will default to the details tab. You can add additional lines to the requisition using the same default chartstring information.

16. For each line, complete the following fields:

**Item:** Do not use this field. It is recommended that you customize this page and hide this field. See Section 10 of this document for instructions on customization.

**Description:** Enter the description of the product or service. If you need to add more information than this field will accommodate, use the Line Comments icon.

**Quantity:** Enter the quantity of the product. If it is a service, enter “1”.

**UMO:** Enter the Unit of Measure. Select **EA** for all commodities (57800) or **DLR** (96200) for all services. **DLR** (91900) Accessible Technology Initiative

**Category:** Enter **57800** for miscellaneous products or **96200** for miscellaneous services. or **91900** for Accessible Technology Initiative

**Price:** Enter the unit Price.
1.1 Adding Comments to a Requisition

You can add comments to a requisition for Procurement or Vendor. The Maintain Requisitions screen provides two ways to enter comments.

To add a comment click on the **Add Comments** link on the Requisition screen. This comment will apply to the entire requisition.

17. The **Header Comments** page will display.

1. Enter your comments in the text field. Add contact name and extension for person who can answer questions on this requisition

2. Select the **Send to Supplier, Show at Receipt** and **Shown at Voucher** check boxes. This will insure the comments are printed on the requisition and receipt. If you do not select these options your comment will not be seen.

3. To enter a comment using the pre-defined comments section, click the **Use Standard Comments** link.
4. From the standard comments window, enter "REQ" in the Comment Type field.

5. In the Comment ID field, click the search icon and select from the search results list.

6. The standard comment will populate in the Comments textbox.

7. Click the OK button to continue.

NOTE: Once comments are entered into the comments field, the comments link on the Requisition screen will change to "Edit Comments".
1.2 Add a Line Comment

To add a comment to an individual line item, click the comments icon in the desired line.

The Line Comments screen will display.

This screen functions like the Header Comments screen.

1. Enter comments in the text box.
2. Select Send to Vendor, Shown at Receipt and Shown at Voucher check boxes at the bottom of the screen.
3. Click the OK button to return to the requisition screen.
The Requisition Process

The comment icon will change indicating that a line comment has been entered into the system.

1.3 Assigning a Requisition ID

After entering all the necessary chartstring information and line information on the Maintain Requisitions page, click the Save button.

18. The Requisition ID will change from NEXT to an assigned Requisition ID number. Record this number so that you will have it available for other functions in the requisition process. At this point the requisition is ready to be approved.

19. If you do not have approver status, notify the person in your department responsible for approving requisitions and supply them with the Requisition ID number.

If you have approver status, click the green checkbox to approve the requisition.

20. After approving, click the Save button.

**NOTE:** All requisitions will be Budget Checked nightly.