

Processing Steps / Field Name	Screenshot / Description
<p>Click on either the Purchasing or CFS End User navigation tile and navigate to Add/Update Requisition.</p>	
<p>1. Click on <b>Add</b>.</p>	
<p><b>Maintain Requisition Page</b></p> <p>2. Click on <b>Add Comments</b></p>	

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<p><b>Add Comments Page</b></p> <p>Add the following comments:</p> <p>UNIVERSITY USE ONLY: Department Name, Requestor Name, and Extension <b>BUILDING, ROOM NUMBER</b> Chartfield (ex. 6XXXXX-SF001-5XXXXX)</p> <p><b>Note: Attach the approved completed IC form on this page.</b> Click on the <b>Attach</b> button to upload your document, then click on the <b>OK</b> button to return to the <b>Maintain Requisitions</b> page.</p>	
<p><b>Maintain Requisition Page</b></p> <ol style="list-style-type: none"> <li><b>Description:</b> Enter the line item starting with the Description of Service, and Independent Contractor.</li> <li><b>Quantity:</b> Enter a quantity of '1' and UOM "Lot".</li> <li><b>Price:</b> Enter the price (total).</li> <li>Click on <b>Requisition Defaults</b> (located to the left of the Add Comments link).</li> </ol>	



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<p><b>Requisition Defaults Page</b></p> <ol style="list-style-type: none"> <li><b>Override:</b> Click on the radio button.</li> <li><b>Supplier:</b> Enter if you have a preferred vendor. Click on  to look up the supplier id.</li> <li><b>Category:</b> Click on  to view a list of choices (ex. 96219-Catering, 96200-Misc Serv, 92403-Spec Lec or 92401-Guest Artist). Make sure the <b>Buyer</b> section remains blank.</li> <li><b>LOT</b> = Service or open orders.</li> <li><b>Ship To:</b> Open and Service = NOTAX</li> <li><b>*Distribute by/*Liquidate by:</b> Service = Amount</li> <li><b>Financial Chartfield:</b> Enter your <b>Dept ID</b> and <b>Fund</b>. <b>Program</b> is an optional field. Leave the <b>Account</b> field blank, it will auto-populate based on the Category code chosen.</li> <li>When finished, click on the  button. The following page will display:</li> </ol>	<p>The screenshot shows the 'Requisition Defaults Page' for Business Unit LACMP and Requisition ID 0000045680. The page is titled 'Default Options' and has two radio buttons: 'Default' and 'Override' (selected). Below this are sections for 'Line', 'Schedule', 'Distribution', and 'Distributions'. The 'Line' section includes fields for Buyer, Supplier (0000083769), Category (96200), Unit of Measure (LOT), and Supplier Location (LOC1). The 'Schedule' section includes Ship To (NOTAX), Due Date, and Ultimate Use Code. The 'Distribution' section includes SpeedChart. The 'Distributions' section shows a table with columns for Dist, Percent, GL Unit, Account, Oper Unit, Fund, Dept, Program, and Class. The table contains one row with Dist 1, Percent 14, GL Unit LACMP, and Fund SF001. The 'OK' button is highlighted in orange.</p>



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<p>15. Click on <b>Mark All</b> to check all the boxes and <input type="button" value="OK"/> to return to the main page.</p> <p><b>NOTE:</b> You can return to <b>Requisition Defaults</b> at any time if you add additional lines later or need to change one of these values.</p>	<p><b>Retrofit field changes to "all" existing requisition lines/schedules/distributions.....</b></p> <p>Business Unit LACMP Requisition Date 04/26/2022      Requisition ID 0000045680 Status Approved</p> <p>For [15] schedule defaults, Select 'Apply' to apply changes to all lines and schedules.      For [15] defaults, Select 'Apply' to apply changes to the Distrib Line.      Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.      Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.</p> <p><input checked="" type="checkbox"/> Mark All <input type="checkbox"/> Unmark All</p> <p><b>Retrofit Field Selection</b></p> <table border="1"> <thead> <tr> <th>Apply</th> <th>Distrib Line</th> <th>Field Name</th> <th>Field Value</th> <th>Apply to All Distribs</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Ship To</td> <td>NOTAX</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Supplier Location</td> <td>LOC1</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>1</td> <td>Fund</td> <td>SF001</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>1</td> <td>GL Unit</td> <td>LACMP</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Category</td> <td>96200</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Supplier</td> <td>0000083769</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Unit of Measure</td> <td>LOT</td> <td></td> </tr> </tbody> </table> <p><input checked="" type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/></p>	Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs	<input checked="" type="checkbox"/>		Ship To	NOTAX		<input checked="" type="checkbox"/>		Supplier Location	LOC1		<input checked="" type="checkbox"/>	1	Fund	SF001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	GL Unit	LACMP	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Category	96200		<input checked="" type="checkbox"/>		Supplier	0000083769		<input checked="" type="checkbox"/>		Unit of Measure	LOT	
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<p><b>NOTE:</b> If you have items that are a different category, UOM or chartfield, change the row after you finish your requisition defaults.</p> <p>16. Click on the <input type="button" value="Save"/> button at the bottom of the page. Once the save is complete, the <b>Requisition ID</b> field will change from 'NEXT' to the assigned requisition number. Make note of this number. Contact your approver to approve the requisition.</p> <p><b>NOTE:</b> If any required fields are missing, you will receive a warning message. All required fields will need to be filled out before the page can be saved</p>	<p><b>Maintain Requisitions</b></p> <p><b>Requisition</b></p> <p>Business Unit LACMP Status Approved      Requisition ID 0000045680 Budget Status Not Chk'd      Requisition Name IC Contractor <input type="checkbox"/> Hold From Further Processing</p> <p><b>Header</b></p> <p>*Requester 45203270294 Diaz, Pedro      *Requisition Date 04/26/2022      Origin ONL      Currency Code USD Dollar      Accounting Date 04/26/2022</p> <p><b>Amount Summary</b></p> <p>Total Amount 500.00 USD      Pre-Encumbrance Balance 2,500.00 USD</p> <p><b>Line</b></p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Quantity</th> <th>*UOM</th> <th>Category</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>Independent</td> <td>1.0000</td> <td>LOT</td> <td>96200</td> <td>500.0</td> </tr> </tbody> </table> <p><input checked="" type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/></p>	Line	Item	Description	Quantity	*UOM	Category	Price	1		Independent	1.0000	LOT	96200	500.0																										
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<p><b>ONE-STOP NOTIFICATION</b>  <b>Maintain Requisition Page</b></p> <p>Click on <b>Notify</b> on the main page.</p>	<p>Maintain Requisitions</p> <p><b>Requisition</b></p> <p>Business Unit: LACMP      Status: Approved <span style="color:red">✖</span>      Requisition ID: 0000045680      Budget Status: Not Chk'd <span style="color:blue">🔍</span>      Requisition Name: IC Contractor <input type="text"/>      <input type="checkbox"/> Hold From Further Processing</p> <p>▼ <b>Header</b> <span style="color:blue">?</span></p> <p>*Requester: 45203270294 <input type="text"/> <span style="color:blue">🔍</span>      Diaz, Pedro      *Requisition Date: 04/26/2022 <input type="text"/> <span style="color:blue">📅</span>      <a href="#">Requester Info</a>      Origin: ONL <input type="text"/> <span style="color:blue">🔍</span>      Online Entry      Currency Code: USD      Dollar      Accounting Date: 04/26/2022 <input type="text"/> <span style="color:blue">📅</span>      <a href="#">Requisition Defaults</a>      <a href="#">Edit Comments</a>         <a href="#">Requisition Activities</a>         <a href="#">Document Status</a></p> <p><b>Amount Summary</b> <span style="color:blue">?</span></p> <p>Total Amount: 500.00 USD      Pre-Encumbrance Balance: 2,500.00 USD</p> <p><b>Add Items From</b> <span style="color:blue">?</span></p> <p><a href="#">Purchasing Kit Item Search</a>      <a href="#">Catalog Requester Items</a></p> <p><b>Select Lines To Display</b> <span style="color:blue">?</span></p> <p><a href="#">Search for Lines</a>      Line <input type="text"/> <span style="color:blue">🔍</span> To <input type="text"/> <span style="color:blue">🔍</span> <input type="button" value="Retrieve"/></p> <p><b>Line</b> <span style="color:blue">?</span></p> <p><input type="button" value="Details"/>    <input type="button" value="Ship To/Due Date"/>    <input type="button" value="Status"/>    <input type="button" value="Supplier Information"/>    <input type="button" value="Item Information"/>    <input type="button" value="Attributes"/>    <input type="button" value="Contract"/>    <input type="button" value="Sourcing Controls"/>    <input type="button" value="Print"/></p> <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Quantity</th> <th>*UOM</th> <th>Category</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/> <span style="color:blue">🔍</span></td> <td>Independent <input type="text"/> <span style="color:blue">🔍</span></td> <td>1,000</td> <td>LOT <input type="text"/> <span style="color:blue">🔍</span></td> <td>96200 <input type="text"/> <span style="color:blue">🔍</span></td> <td>500.0</td> </tr> </tbody> </table> <p><a href="#">View Printable Version</a>      *Go to <a href="#">...More...</a></p> <p><input type="button" value="Save"/>    <input type="button" value="Return to Search"/>    <input type="button" value="Previous in List"/>    <input type="button" value="Next in List"/>    <input style="border: 2px solid red;" type="button" value="Notify"/>    <input type="button" value="Refresh"/></p>	Line	Item	Description	Quantity	*UOM	Category	Price	1	<input type="text"/> <span style="color:blue">🔍</span>	Independent <input type="text"/> <span style="color:blue">🔍</span>	1,000	LOT <input type="text"/> <span style="color:blue">🔍</span>	96200 <input type="text"/> <span style="color:blue">🔍</span>	500.0
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