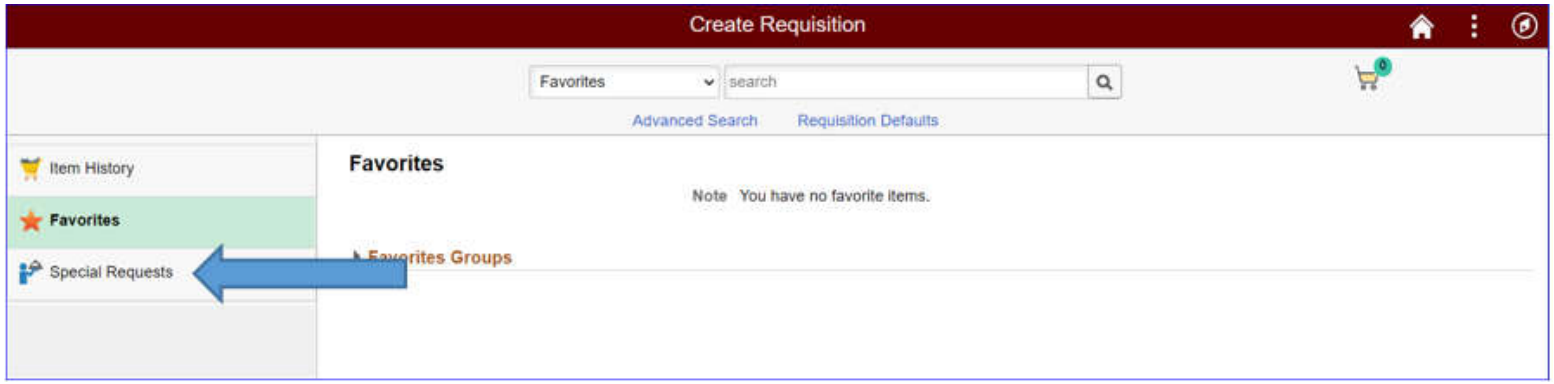
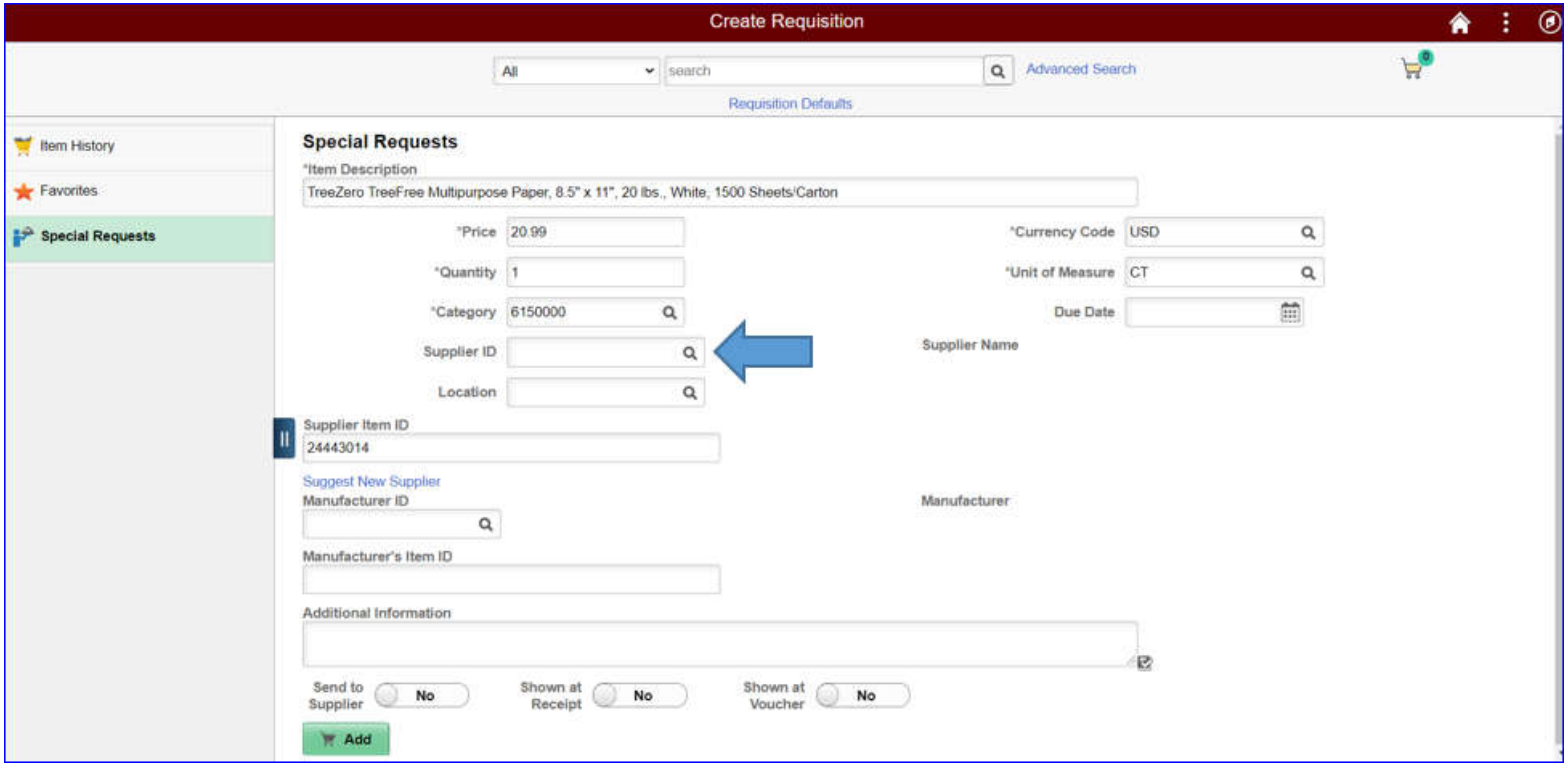
PS Financials 9.2

Create Requisition

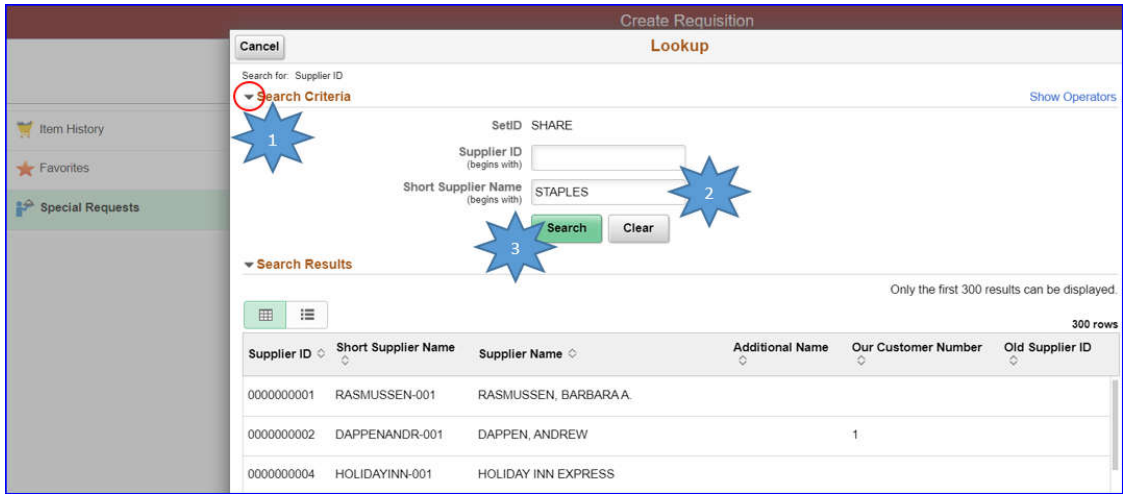
Special Request



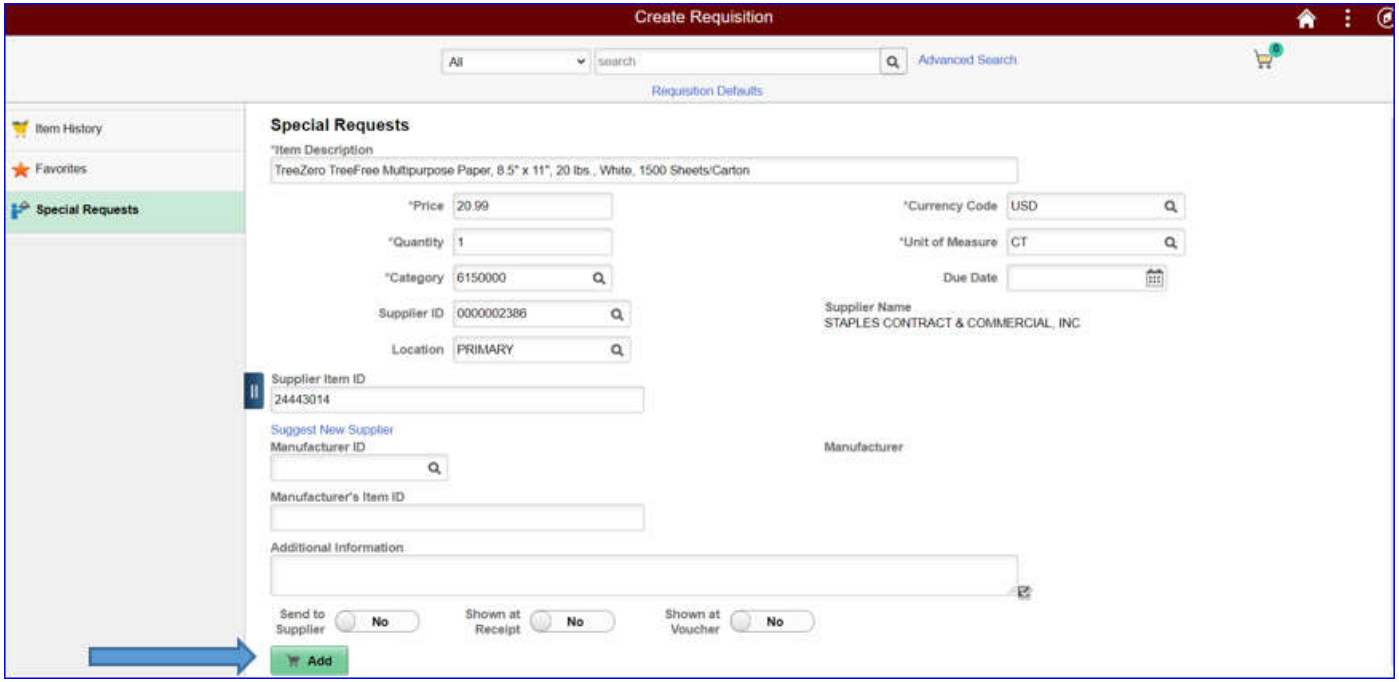
Look up Supplier ID



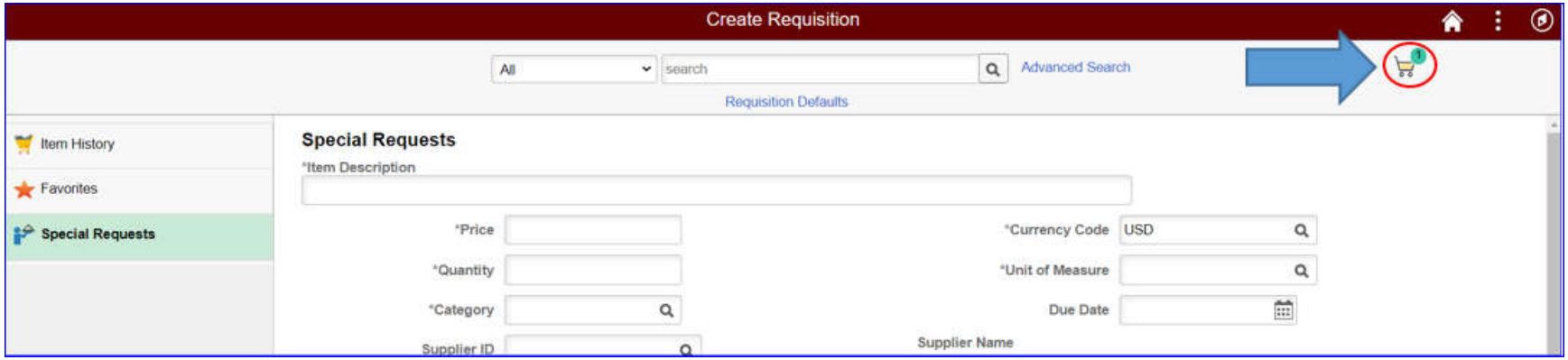
Search Criteria, Short Supplier Name



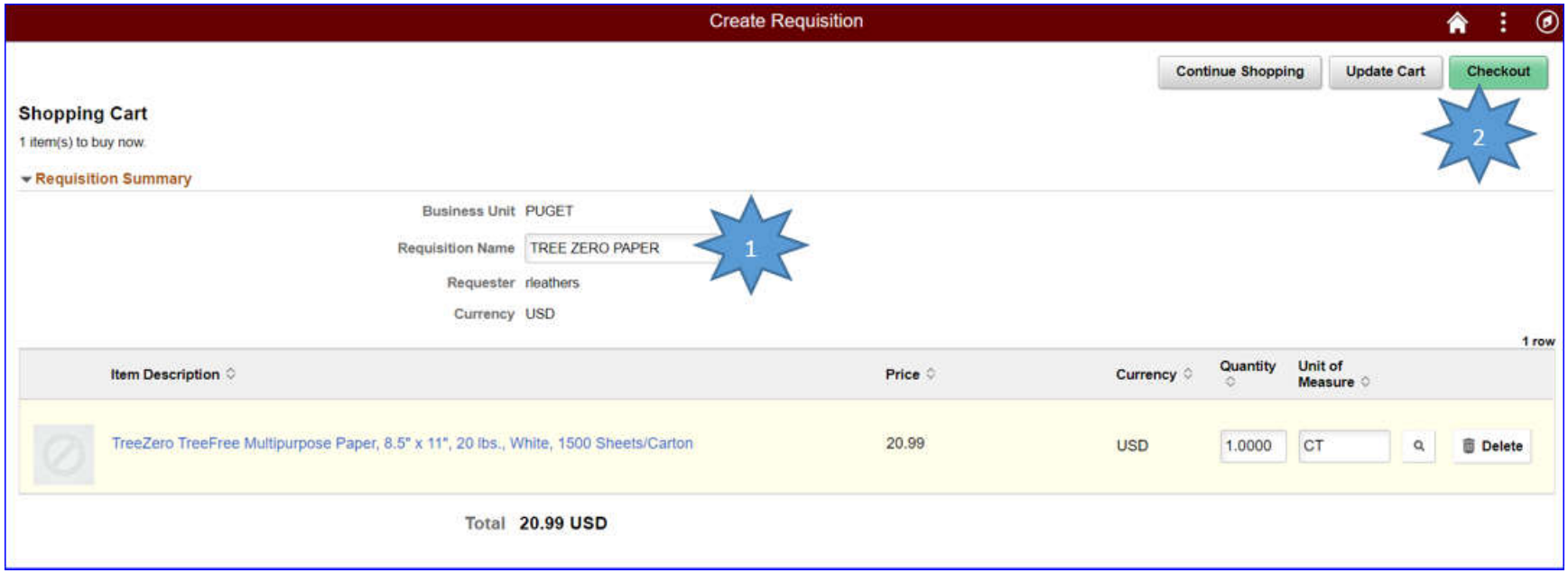
Add to cart



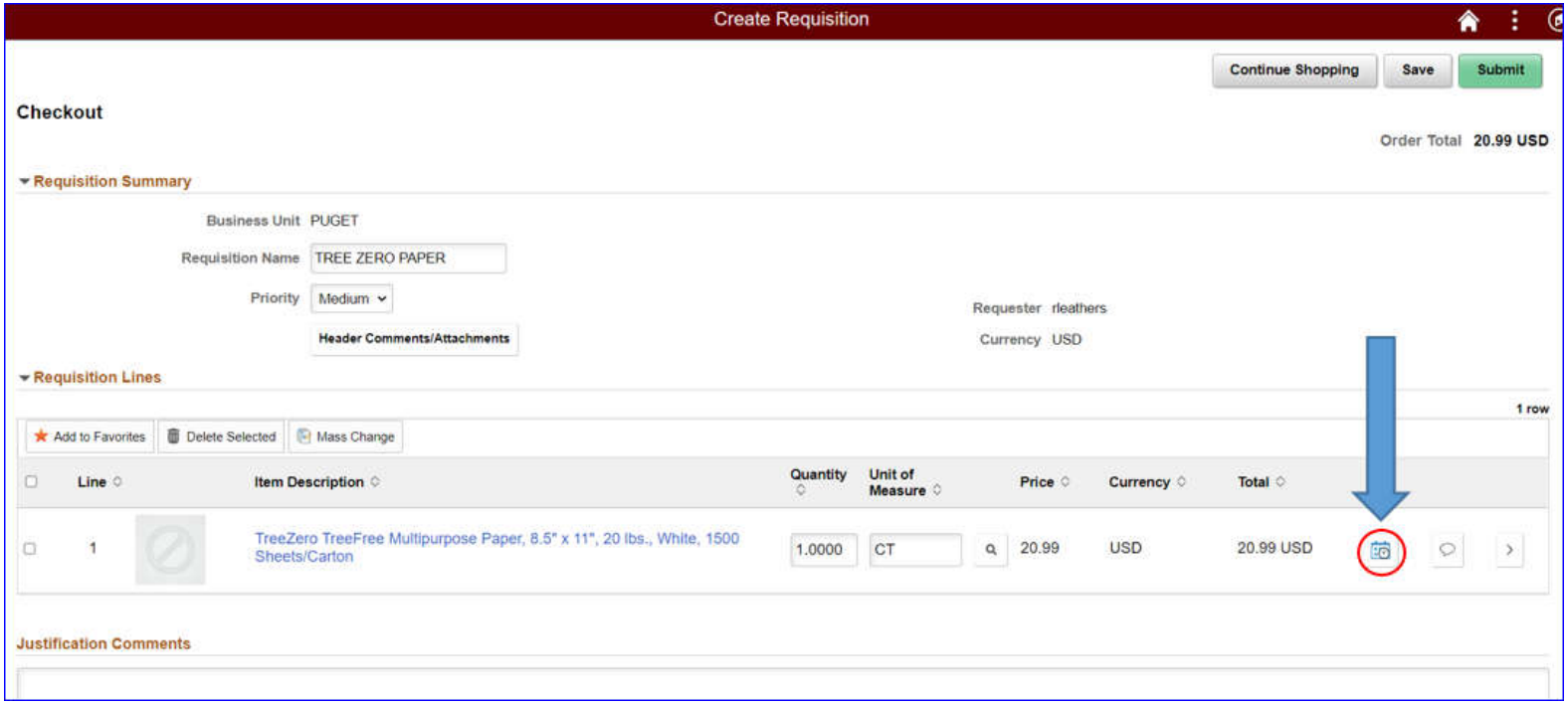
Check out cart

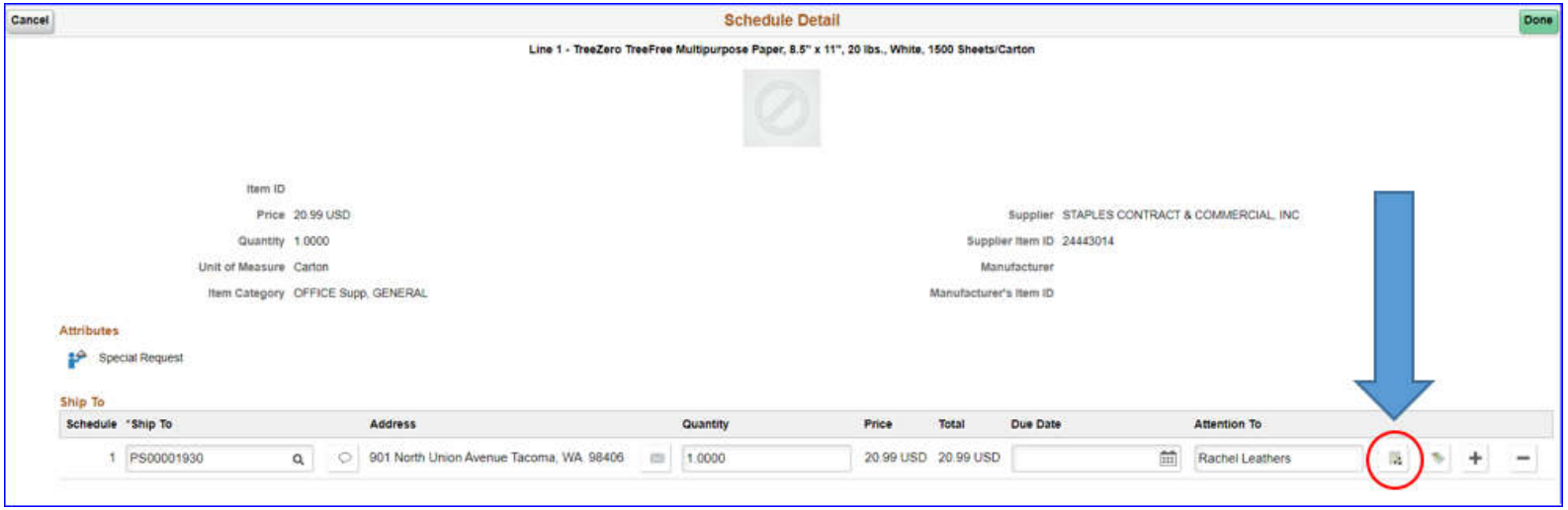


Requisition Name, Checkout

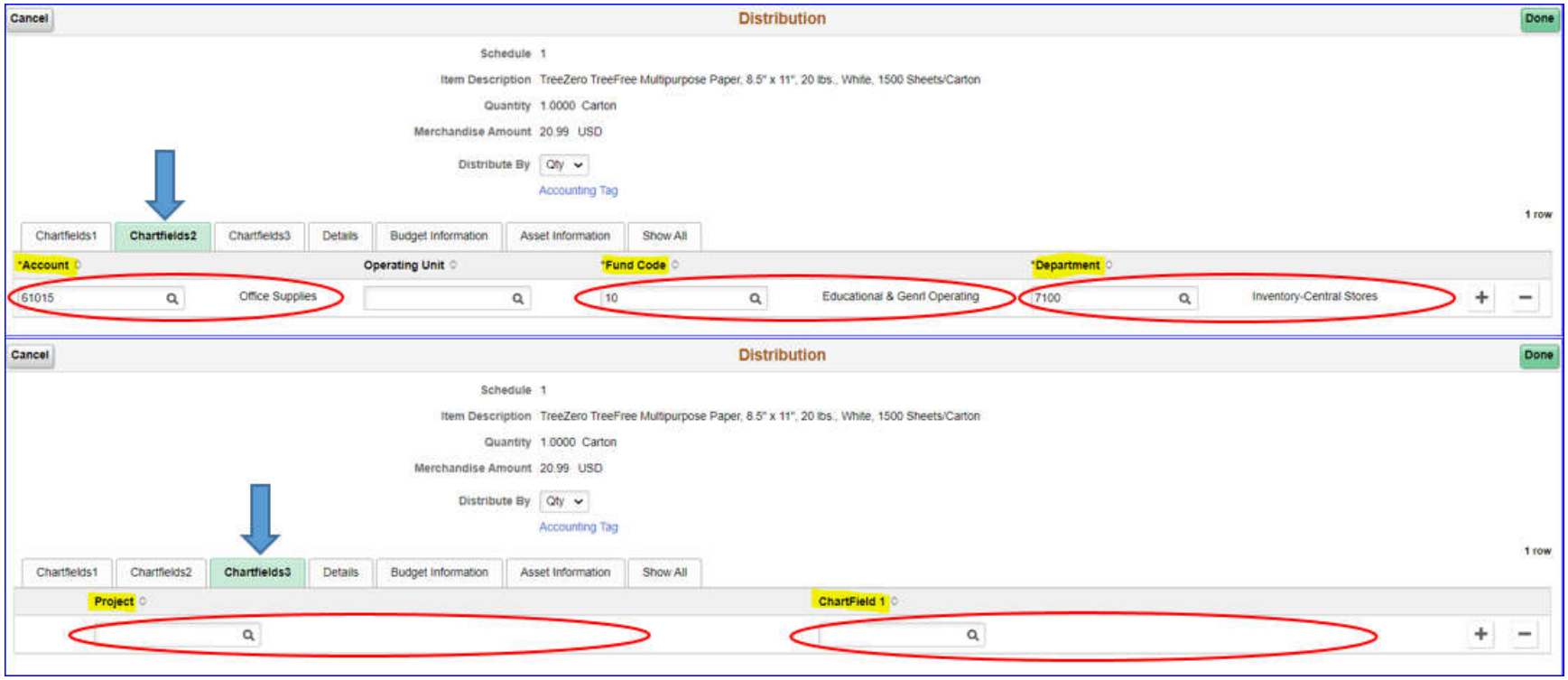


To select/confirm budget coding:
View Schedule





View Chartfields2 and Chartfields3 tabs to confirm coding is correct…



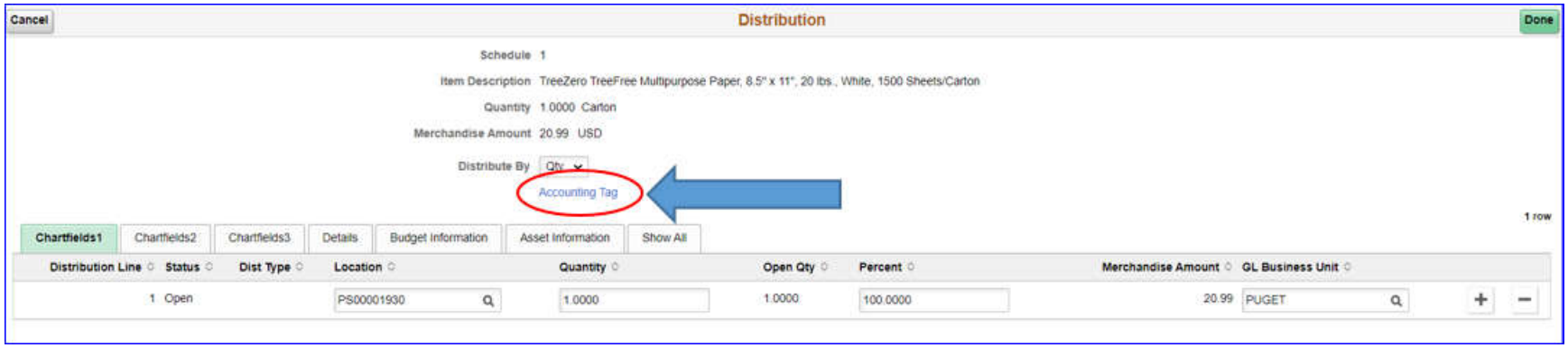
If budget is correct, keep clicking **Done** buttons at top right…

…until you get to Checkout screen (see last page of these instructions)

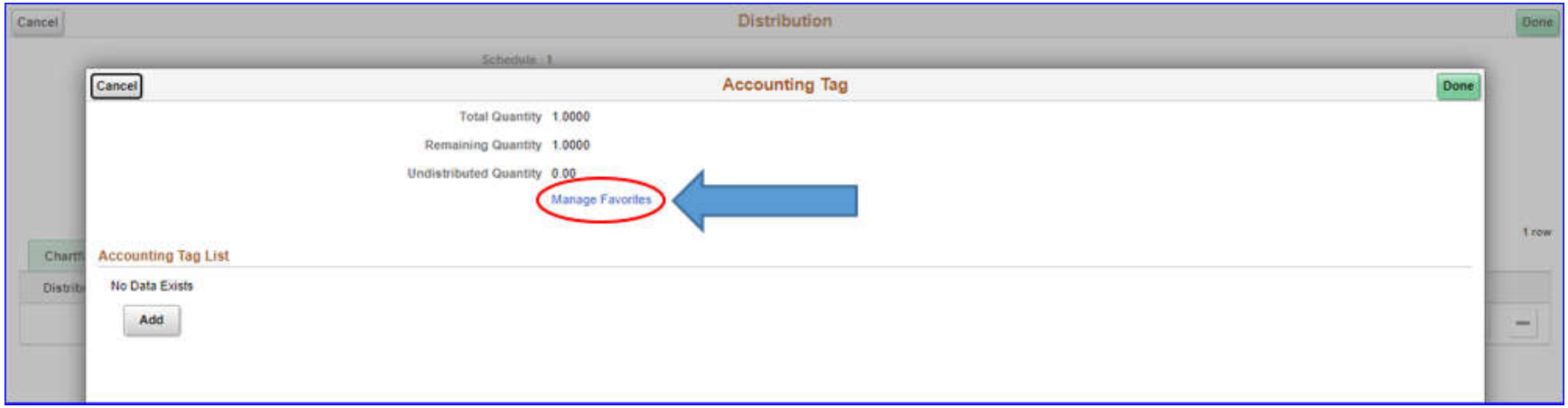
Otherwise, if budget is not correct, go to next page of these instructions…

PeopleSoft now refers to Speedcharts as “Accounting Tags” on Requisitions

Distribution: Accounting Tag (Speedchart)

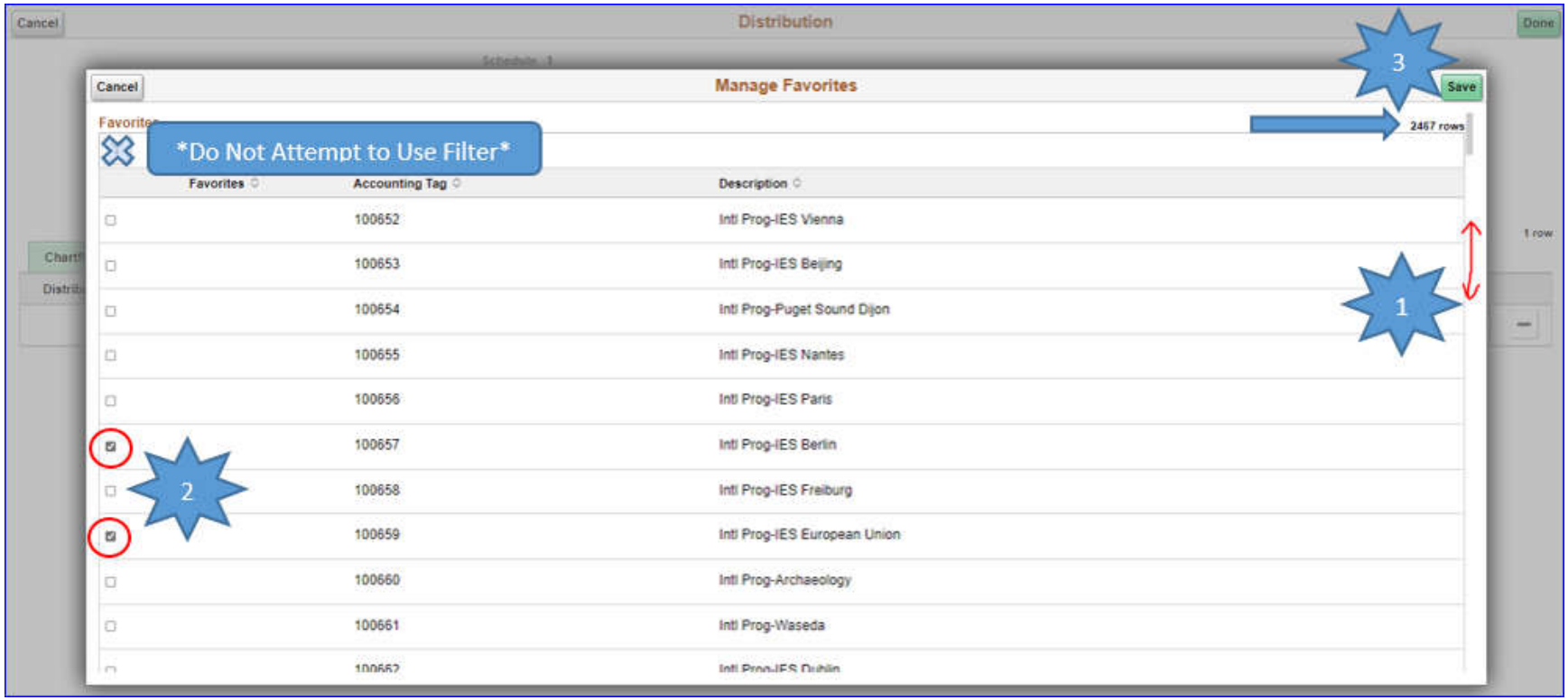


Upon first use, build your own list of Favorite Speedcharts



The following step to produce a Favorites list is only needed on the first requisition you create…

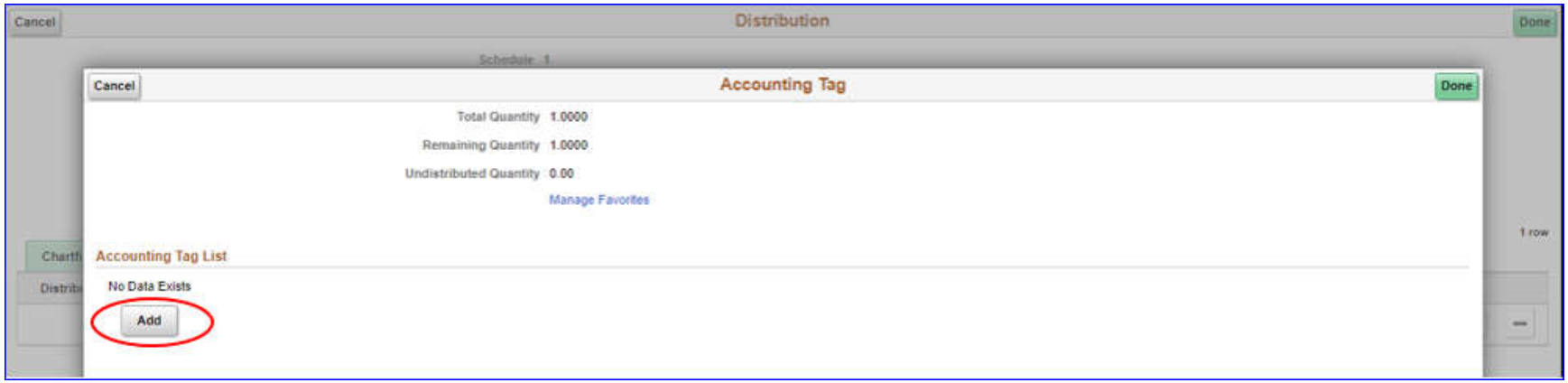
Here's how…

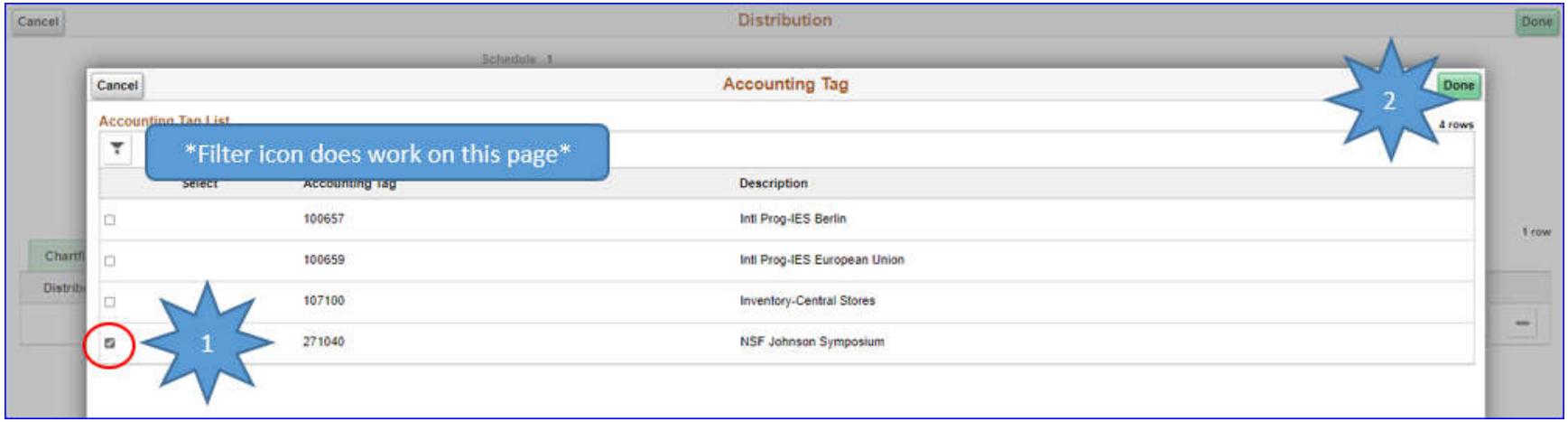


1. Use the right scroll bar to look through the entire list of available speedcharts
2. Click the checkboxes on the left to mark the speedcharts you regularly use
3. Click the Save button at top right to save your Favorites in a list.

*Please stay away from the Filter icon at top left on this page. It works in other places, but on this "Manage Favorites" page, it will lead you to an error message. Puget Sound is working with Oracle PeopleSoft Support to resolve.

Add Accounting Tag from Favorites list



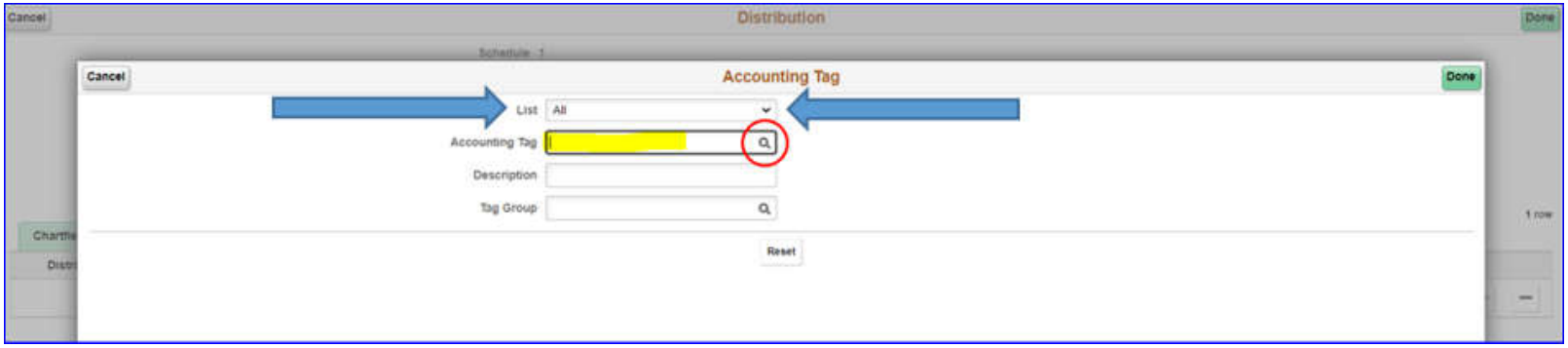


*If Accounting Tag (Speedchart) has not been saved to your Favorites list yet, you can use the Filter icon from this page to find it. Follow instructions between ********** lines to see how.

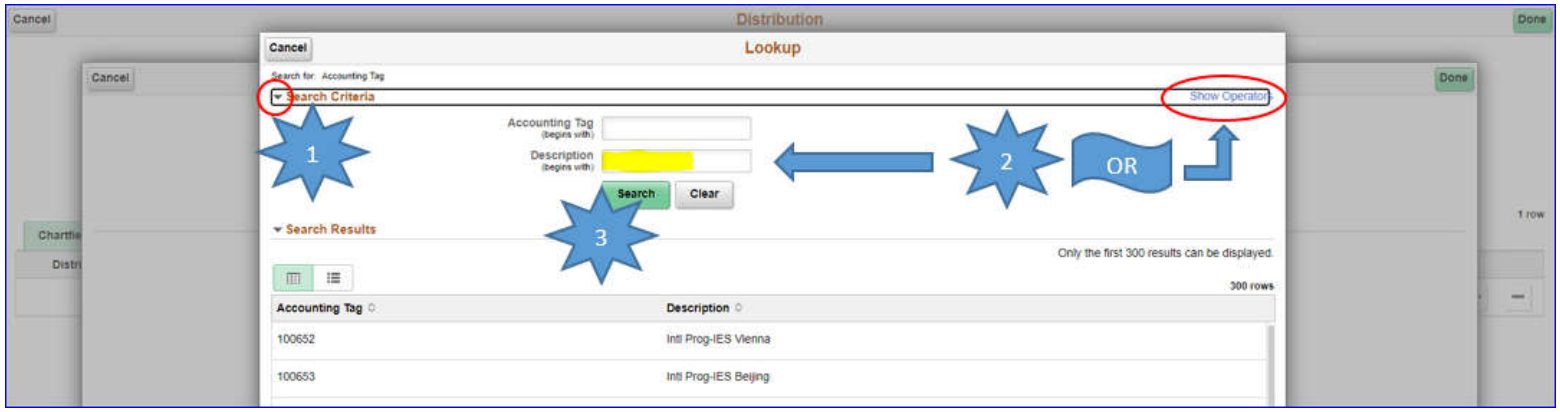
****

If needed, filter to find desired Accounting Tag (Speedchart)

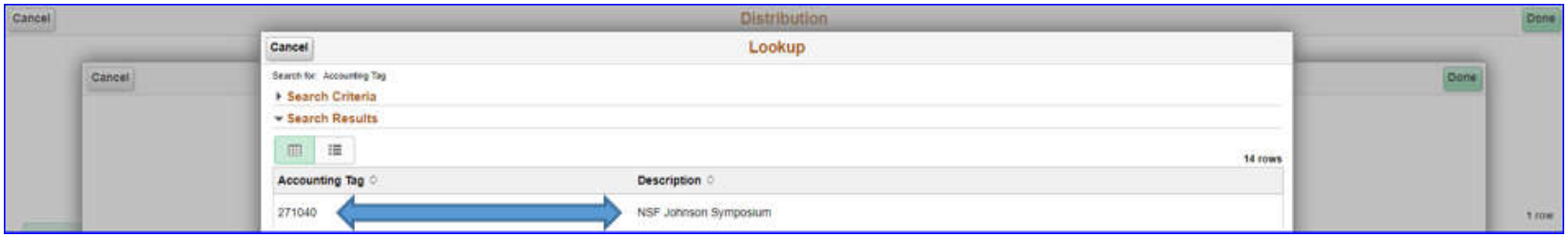
Enter Accounting Tag (Speedchart) if known…or use lookup



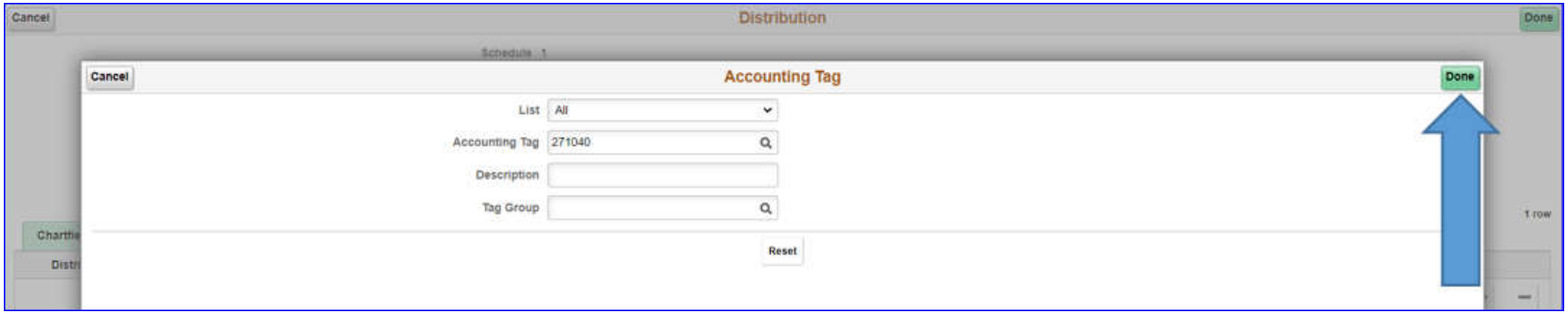
Enter Description (begins with) if known…or use Show Operators to use “contains”



Click either code or description of desired Speedchart to continue



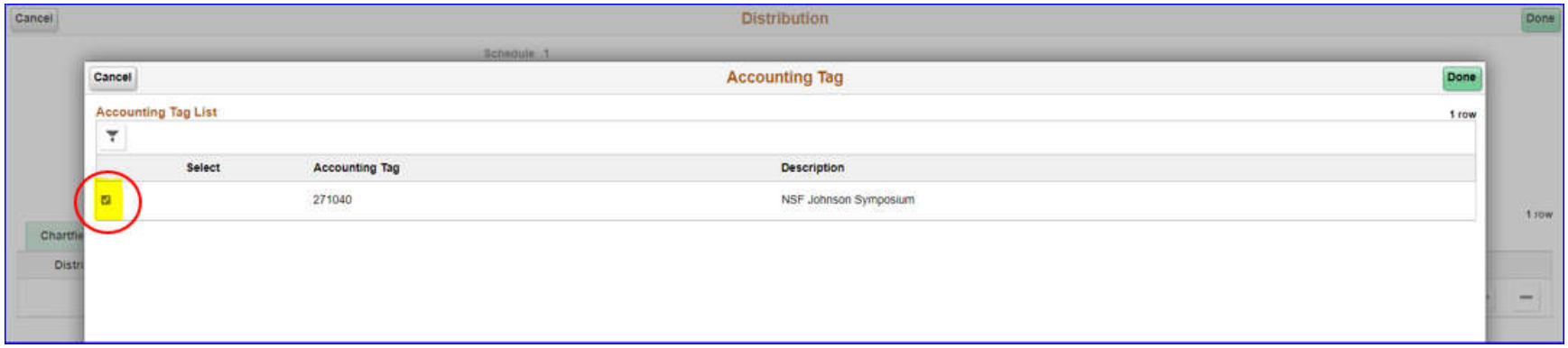
Click Done to pull selected Speedchart into requisition



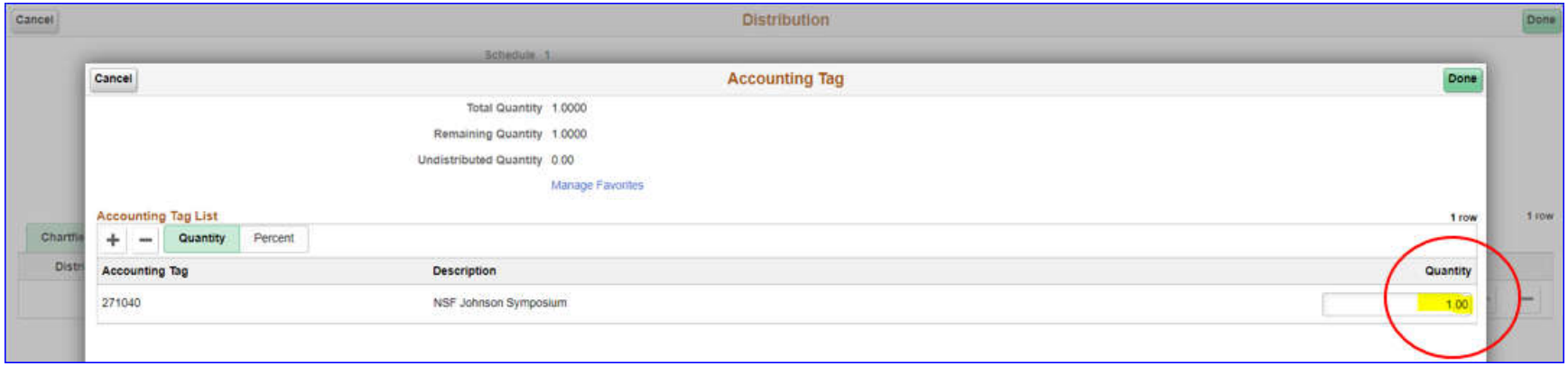
****

Keep clicking 

buttons at top right…making sure to click checkbox at left…



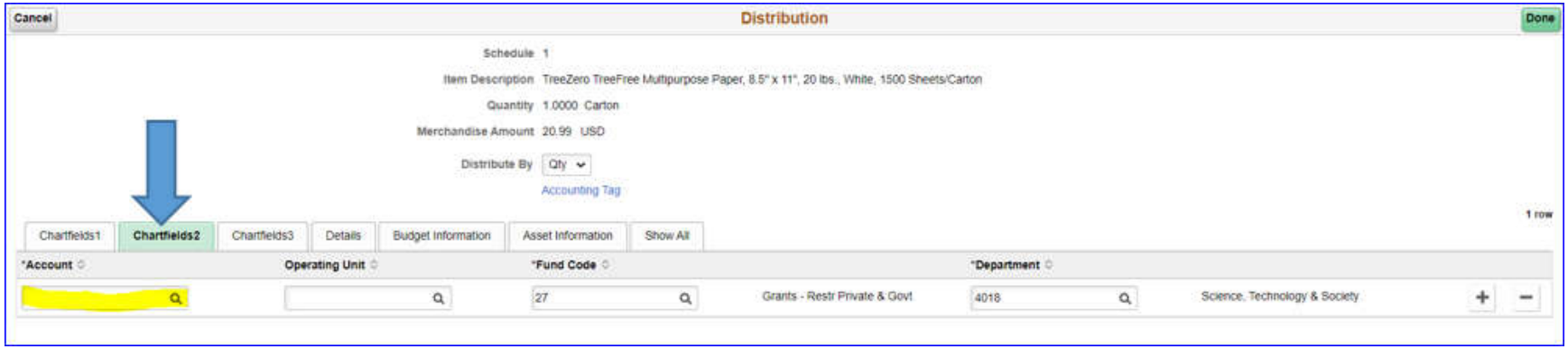
…and entering desired quantity at right…

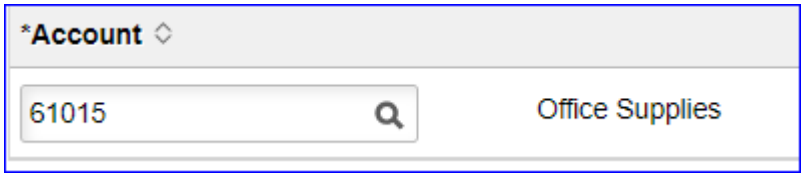


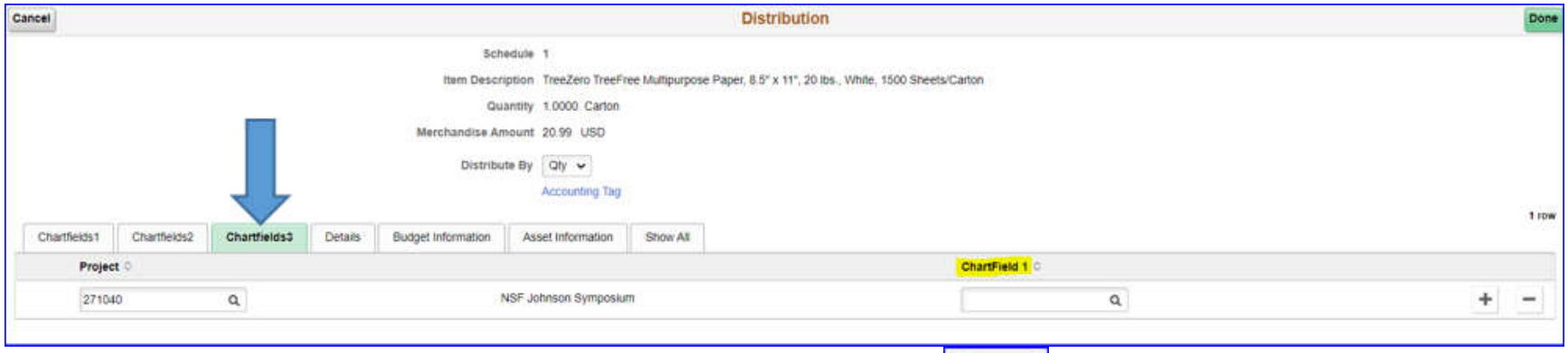
When budget is replaced, expenditure account (and Chartfield1) need to be re-entered…

Go to Chartfields2 and Chartfields3 tabs to confirm coding is complete

Enter or use lookup icons to select desired (expenditure) Account and (optional) Chartfield1





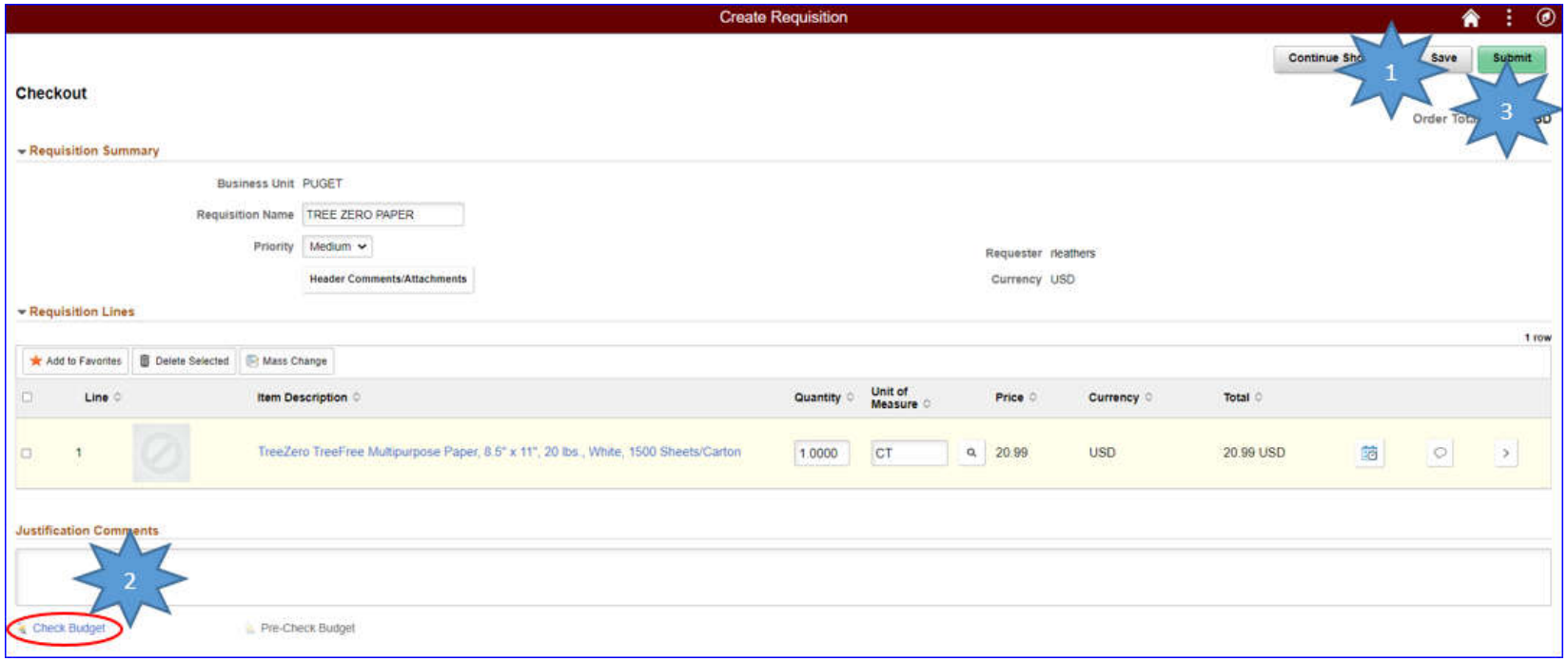


When coding is complete, keep clicking 

buttons at top right

…until you get to Checkout screen (see last page of these instructions)

Save, Check Budget, Submit for approval



Congratulations! You have entered and submitted a PeopleSoft requisition!