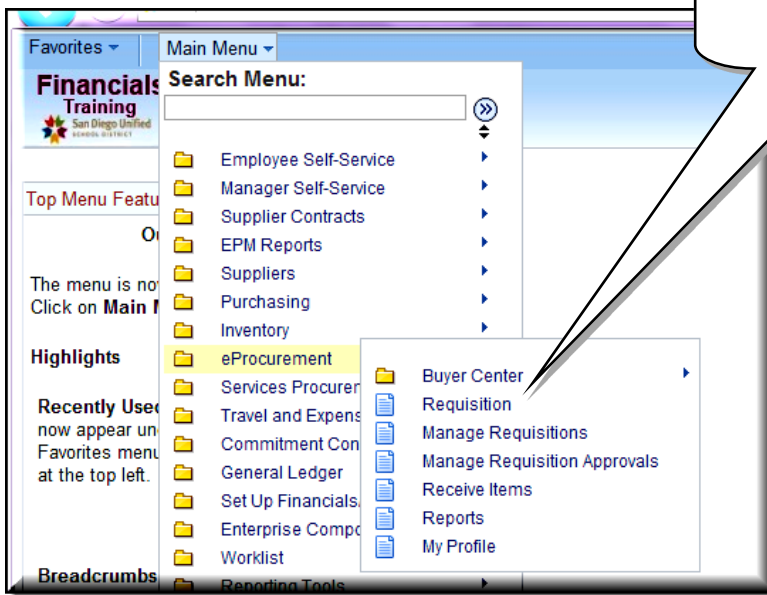


Requisition Settings for Special Request Items

Shortcut for Ordering Multiple Special Request Items

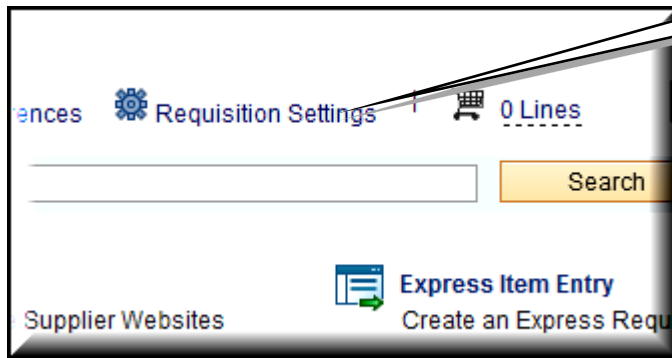
This Job Aid shows how to use the **Requisition Settings** feature in eProcurement to set up defaults for your **Special Request** items on a single order. You can enter information into a few of the fields, and have that same information populate those fields automatically for each Special Request item in that requisition. This works well when you order multiple items from the same supplier, or use the same budget for all items, or generally plan to use the same exact information in a given field for all the Special Request items on one requisition.

1. Start from the PeopleSoft Financials home page:



Click **Main Menu**, then click **eProcurement**, and then click **Requisition**.

2. On the eProcurement Home Page, in the upper right area, find **Requisition Settings**.



Click **Requisition Settings**.

3. On the Requisition Settings page, fill in whichever available fields (*text boxes*) you want to have show up automatically on each Special Request item you plan to add to this order. In the example shown below, we entered the following fields:

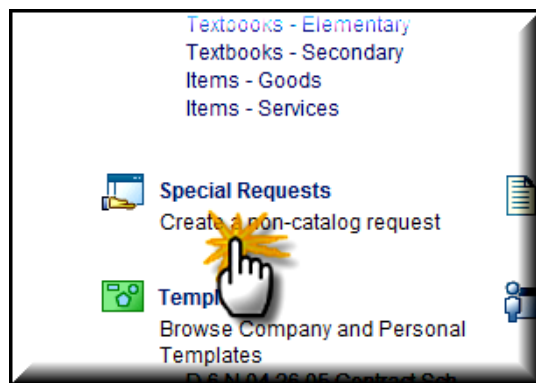
- A. **Supplier**— We chose Meredith Digital from the Supplier (vendor) list.
- B. **Category**— All items will be paid with the same budget, so we chose the GDS_4301 category.
- C. **Unit of Measure**—All items come packaged one to a package/unit, so we chose EA for “Each”.
- D. **Chartfields**—We entered the budget string here so that all items will be paid with the same budget.
- E. **OK**—When done entering the information, click the OK button.

The screenshot shows the 'Requisition Settings' page for 'San Diego Unified School Dist'. The 'Requisition Name' is 'Printer Ink Cartridge' and the 'Priority' is 'Medium'. The 'Requester' is 'Leslie Doe'. Under 'Line Defaults', the 'Supplier' is '0000024853', 'Category' is 'GDS_4301', and 'Unit of Measure' is 'EA'. Under 'Accounting Defaults', the 'Chartfields1' table is populated with the following data:

Percent	Location	GL Unit	DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended
	0003A	SDUSD	0003	00000	00		1000	1110	01000	0000

Callouts A through E are placed over the Supplier, Category, Unit of Measure, Chartfields1 table, and the OK button respectively.

4. Click the **Special Requests** link to start adding items to this requisition. (All the information you entered into the Requisition Settings page will now automatically fill in for each Special Request item you create for this one order).



5. The Special Request screen is displayed, with the information you entered earlier from the Requisition Settings page (*Category, Supplier, etc.*). This will save you time, as now you don't have to type all that information repeatedly for each item you add to this order.

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

*Supplier ID

Supplier Name Meredith Digital [Suggest New Supplier](#)

6. For the first example item below, we filled in the **Item Description, Price, Quantity,** and the required **Additional Information.**

Item Details

*Item Description

*Price

*Quantity

*Category

Supplier

*Supplier ID

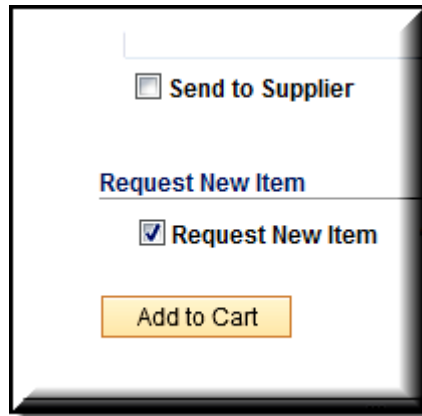
Supplier Name Meredith Digital

Additional Information

Send to Supplier Show at Receipt Show at V

7. Since this printer cartridge is something we will be ordering again in the future, we decided to click a checkmark into the checkbox for **Request New Item**. This sends a request to the Strategic Sourcing Department, asking to have this item added as a Catalog (*stock or inventory*) item. If it's accepted as such, the next time we order this item we might be able to find it as a Catalog item, instead of having to order it as a time-consuming Special Request item.

Click the **Add to Cart** button to add this item to your requisition.



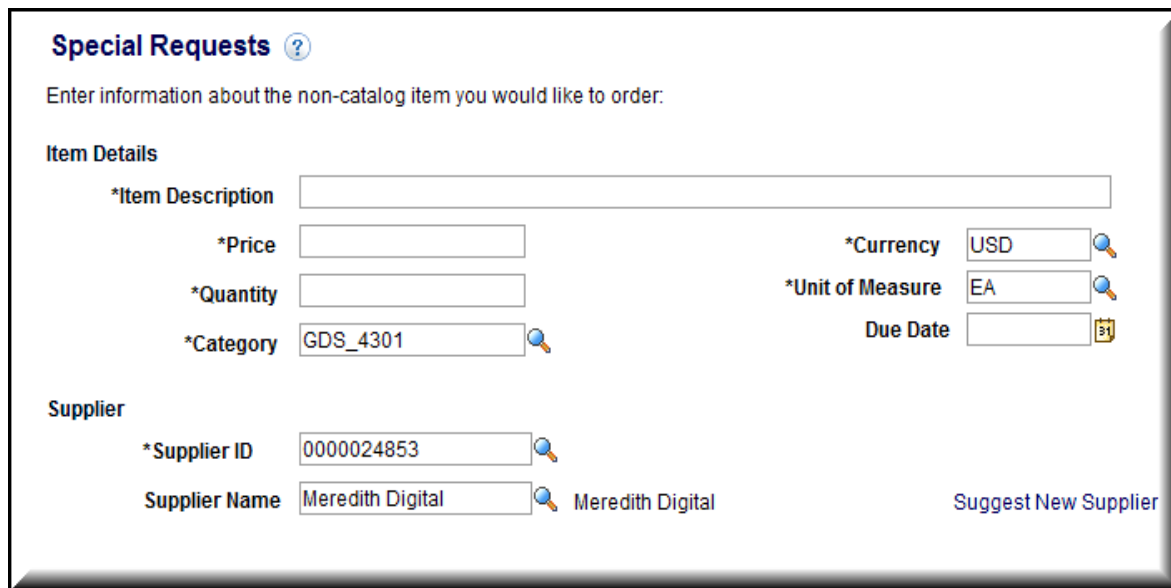
Send to Supplier

Request New Item

Request New Item

Add to Cart

8. A fresh, blank Special Request screen is displayed, to allow us to order another item. The same fields are automatically filled in for us once again, to save time, since the next item we want to order will be from the same Supplier, and will use the same Unit of Measure, and the same Category and Budget.



Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

*Supplier ID

Supplier Name Meredith Digital [Suggest New Supplier](#)

9. For our next item we fill in the required fields again (**Item Description, Price, Quantity**). This time we're ordering a different printer cartridge for another printer used in our department.

When done, we click the same **Add to Cart** button as before (*not pictured here*).

Special Requests ?

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description

*Price

*Quantity

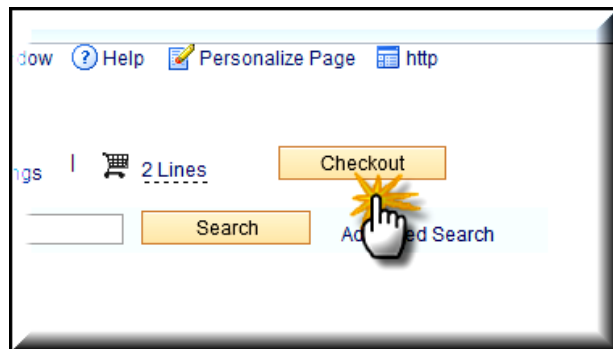
*Category

Supplier

*Supplier ID

Supplier Name Meredith Digital

10. The two printer cartridges are all we want to order on this requisition. In the upper right corner, click the **Checkout** button to go to the Checkout page (*used to be called the Review and Submit page*).



Complete the requisition normally:

- A. Run the Budget Check to pre-encumber the funds.
- B. Save and submit the requisition.

For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft