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)**

[Image of PeopleSoft interface showing the Accounting Tag feature]

Upon first use, build your own list of Favorite Speedcharts

[Image of PeopleSoft interface showing the Manage Favorites feature]

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

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Keep clicking done 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).
Congratulations! You have entered and submitted a PeopleSoft requisition!