PS Financials 9.2
Create Requisition
Special Request

Look up Supplier ID
Search Criteria, Short Supplier Name

(...click desired supplier to pull onto requisition)

Add to cart
Check out cart

(...or if you click Cart icon)

Add Requisition Name and Select/Confirm budget coding
View Chartfields2 and Chartfields3 tabs to confirm coding is correct.
If budget is correct, keep clicking 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 refers to Speedcharts as “Accounting Tags” on Requisitions

Distribution: Accounting Tag (Speedchart)

Note: You can save Accounting Tags (Speedcharts) to your own Manage Favorites list. How-to instructions are provided in the “Managing Favorites for Requisitions” link on the Finance Procurement Resources & Training Materials | University of Puget Sound web page.

If no favorites have been saved to select, follow instructions between ****************** lines to look up Accounting Tag (Speedchart).
Click Add button

To find (or enter) desired Accounting Tag (Speedchart), click Filter button
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 (shown next)
Save and Checkout
Check Budget and Checkout (again)
Submit for approval
Congratulations! You have entered and submitted a PeopleSoft requisition!

(Suggestions to improve this training document? Please send your ideas to finance@pugetsound.edu)