PEOPLESOFT FINANCE · USER GUIDE

How to Create a Requisition

A step-by-step guide for requesters — from requisition settings through budget check and submission.

VERSION	UPDATED	AUDIENCE	CLASSIFICATION
1.0	August 2026	Requesters	Internal use

01 / GENERAL GUIDELINES

Purchase Requisitions

Follow the steps to create a requisition

- Purchase Requisitions are used to generate Purchase Orders for contractual services or supplies. The Purchase Order itself is a contractual document that contains terms and conditions.
- In general, purchase requisitions are required for all purchases greater than $10,000. There are exceptions for certain types of payments, like reimbursements, honorariums, or stipends.

02 / REQUIREMENTS

When is a PO required?

See next section for a list of PO requirements.

- Purchases over $10,000.
- The supplier requires a PO to fulfill an order.
- The department requires a PO for tracking purposes or to maintain terms
- & conditions associated with the purchase.
- Assets are being acquired – defined as any item with a total cost of acquisition per unit greater than or equal to $5,000 (inclusive of tax, shipping, installation, etc.)
- Radioactive materials are being acquired.
- Construction-related procurements.

FOR ADDITIONAL DETAILS SEE THE PURCHASING MATRIX
Link to the Competitive Procurement Guidelines

03 / CREATE THE REQUISITION

Set requisition defaults before adding lines

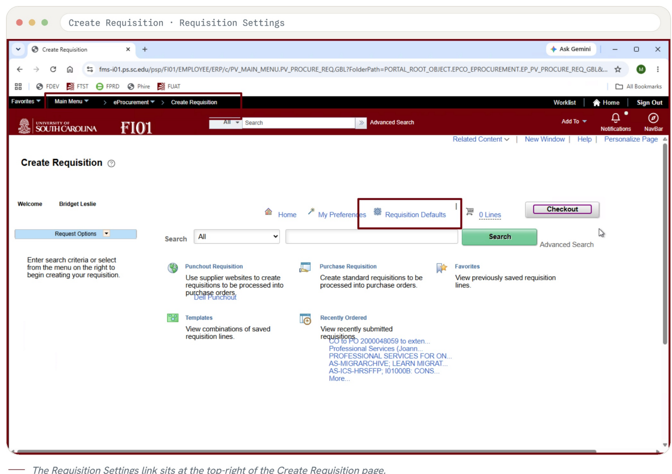
Do this so every requisition line you create inherits the correct funding and ship-to values.

`Main Menu ▸ eProcurement ▸ Create Requisition ▸ Requisition Settings`

1 Open Requisition Settings

Navigate to eProcurement > Create Requisition

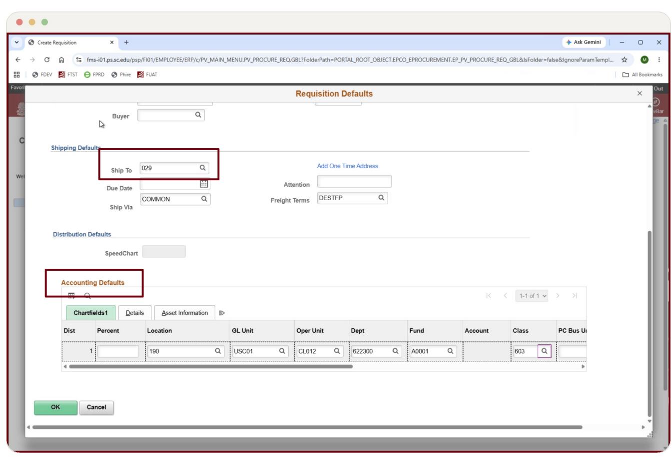
From the Create Requisition page, select **Requisition Defaults** in the top-right before adding any items.



The Requisition Settings link sits at the top-right of the Create Requisition page.

2 Enter your Ship To and Accounting Defaults

In **Accounting Defaults**, set your requisition line default ship to and accounting string.

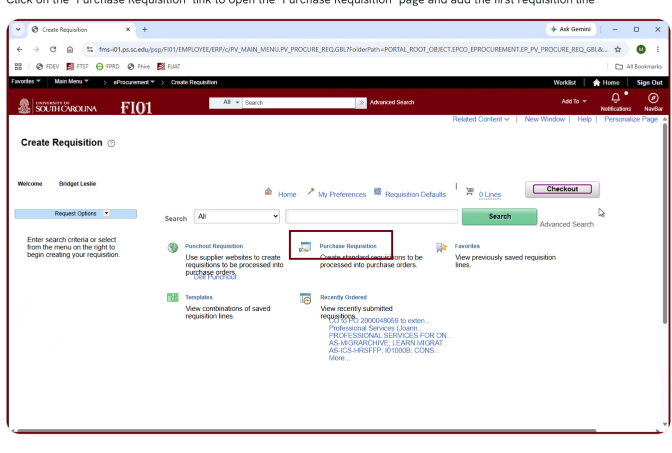


04 / CREATE THE REQUISITION

Create the Requisition Line

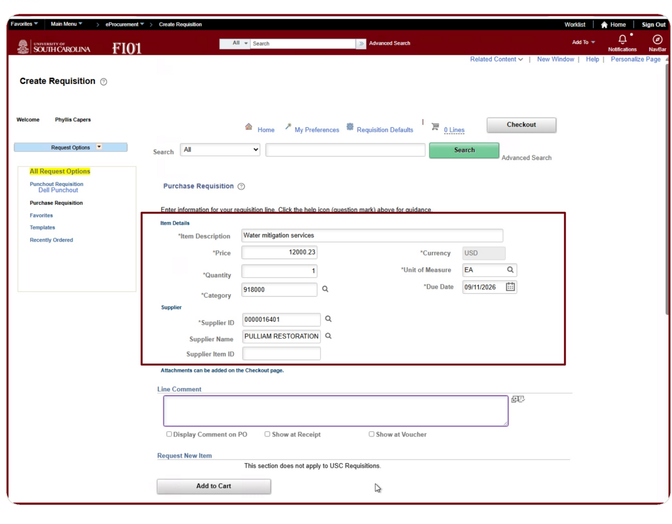
3 Click on "Purchase Requisition"

Click on the "Purchase Requisition" link to open the "Purchase Requisition" page and add the first requisition line



4 Enter the requisition line

Enter the first requisition line on the "Purchase Requisition' page. Complete the Item Details and Supplier, then click "Add to Cart".



5 Item Descriptions

Item Descriptions should contain a detailed description of what you are buying. Typically, these details are on the supplier's quote. For example, instead of "2-Ply Jumbo Roll" enter a detailed description such as "Toilet Paper, 2 Ply, Jumbo Roll, white, 1000 per roll, Roll width 3.50", roll diameter 8.8 core, 3.3" diameter"

Please add additional information for the following requests:

- **Blanket Purchase Orders:** "BPO" or "Blanket" or similar, as well as the effective

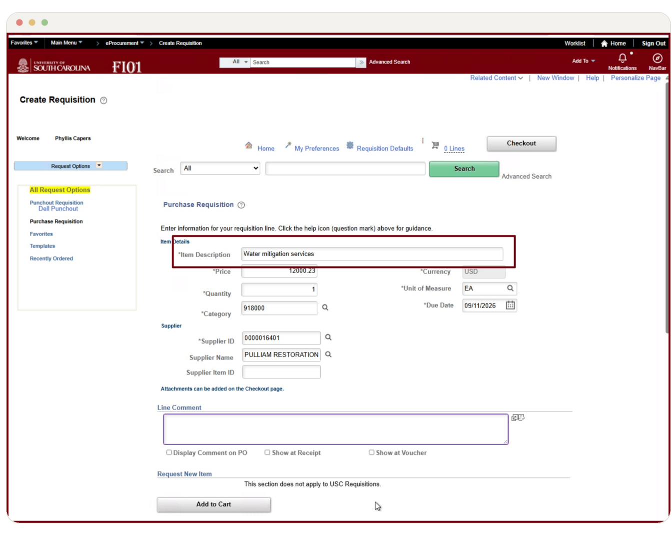
start and end date. Fiscal year blanket orders should include date ranges like "7/1/20 to 6/30/21."

- **Change Orders that involve adding a new line to existing Purchase Order**:

"C/O to PO 20000xxxxx"

- **Bids or Solicitations:** "To Be Bid," "Put Out for Bid," or "Solicitation Required" in

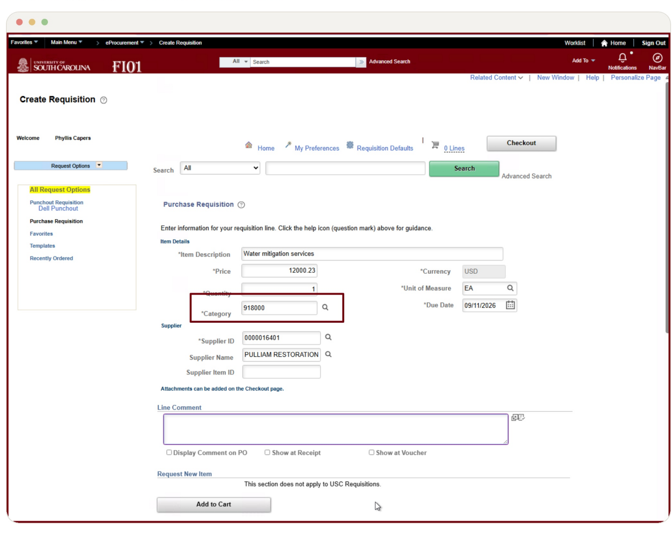
conjunction with using the Supplier named "TO BE BID BY PURCHASING" (Supplier ID #0000008279



6 Item Categories

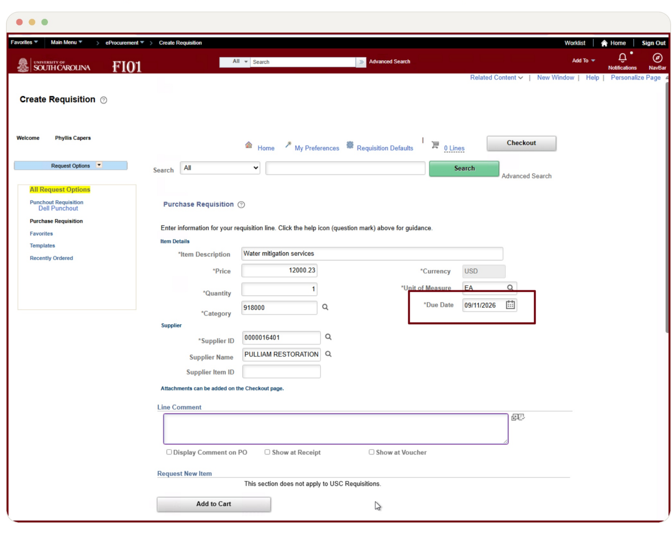
The item category defaults the correct general ledger account number, asset profile (if applicable), tax applicability, and receipting requirement default for your purchases;

- Asset category descriptions include the word "Asset,"
- Asset category codes contain 5 digits and the letter 'A.' For example, Laboratory Equipment (Asset), 49000A.
- Non-asset categories have 6 digits without the 'A.'



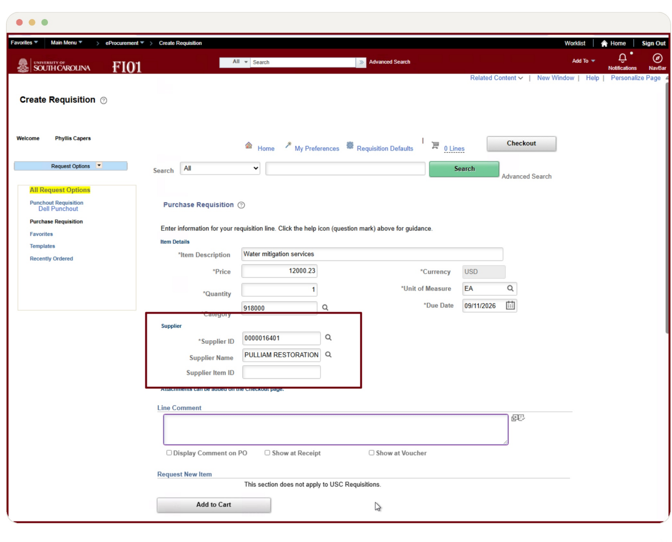
7 Due Dates

Use the Due Date in the item details to indicate the delivery date expected to receive goods or services.
For blanket orders or grant-related procurements, select the last effective date of the purchase order



8 Suppliers

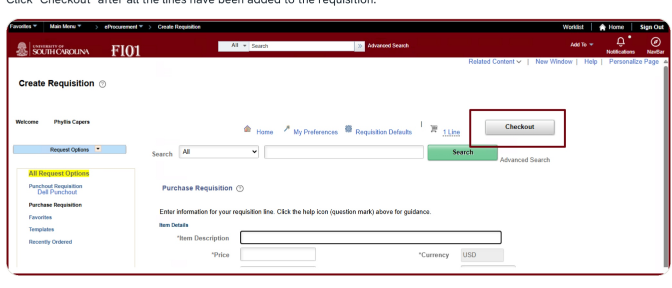
Use the search features to find the supplier, but if you cannot find the supplier, contact the Accounts Payable by using the email address apsupplr@mailbox.sc.edu.



VISIT THE SUPPLIER MANAGEMENT PAGE
For additional information on supplier management, click here to visit the supplier management page.

9 Go to the Checkout page

Click "Checkout" after all the lines have been added to the requisition.



05 / COMPLETE THE CHECKOUT PAGE

Checkout

Complete additional important fields on the "Checkout - Review and Submit" page such as the requisition name, the amount only checkbox, attachments and accounting distributions.

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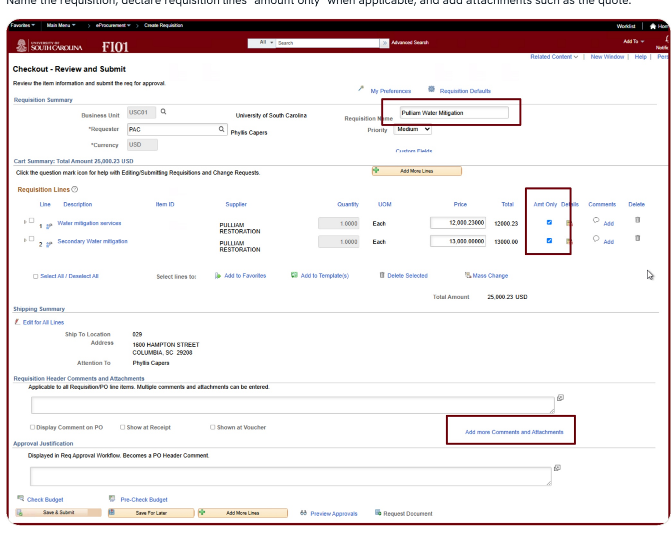
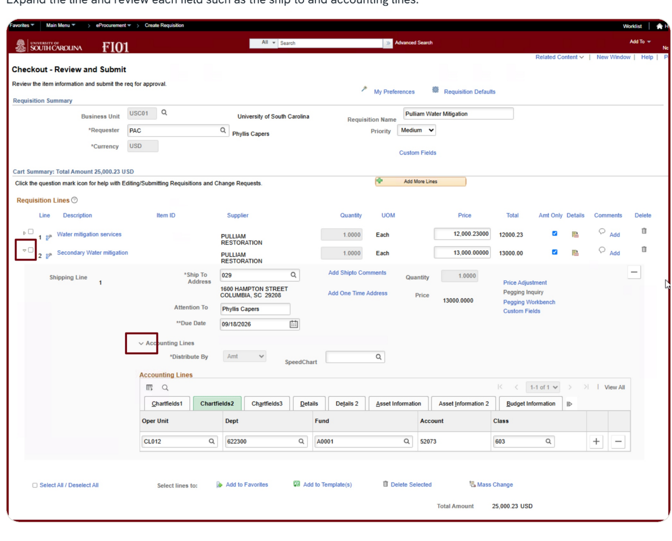
Name the requisition, declare requisition lines "amount only" when applicable, and add attachments such as the quote.



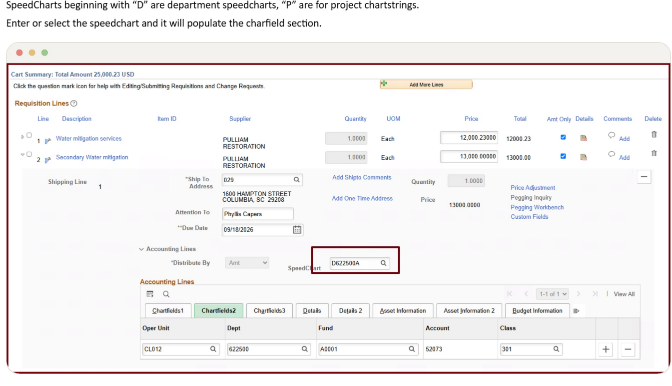
11 Review each line

Expand the line and review each field such as the ship to and accounting lines.



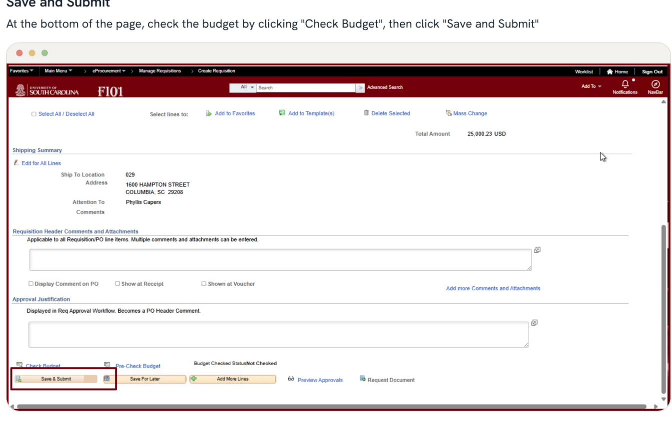
12 Speedcharts

SpeedCharts beginning with "D" are department speedcharts, "P" are for project chartstrings.
Enter or select the speedchart and it will populate the charfield section.



13 Save and Submit

At the bottom of the page, check the budget by clicking "Check Budget", then click "Save and Submit"



14 Review and Return

Review approvers by clicking on "Multiple Approvers", then return to "Manage Requisitions" or "Create New Requisition"