

Requisition Guide for Requesters

PeopleSoft Financials 8.4 Requisition Guide For Requesters



Requisition Guide for Requesters

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Requisition Guide for Requesters

1.0 Entering a Requisition

Overview

A requisition is the first step in the procurement process. The format of a requisition within the system is made up of 4 basic parts, Header, Line, Schedule, and Distribution.

The requester fills out the requisition for the supplies/equipment/services required for their department or project. After the requisition has been filled out completely, the department approver must approve it. Following approval, the budget checking process will be run to verify that budget exists and a pre-encumbrance will be created for the requisition. Staff in purchasing, who will create a purchase order, will then pick up the requisition.

Requisition Layout

Header – Used for the entire Requisition
Form – Requester, Req Date, Origin, Acct Dt, Hold Flag
Header Defaults (override) – Vendor, Buyer, Ship To, Due Dt, Distribution
Header Comments – Vendor, Receipts, Voucher

Line – Each item requested
Form – Description, Qty, UOM, Category, Price, Ship To, Status

Schedule – Delivery: Ship To, Due Date, Qty, Price
Distribution – Account/Dept/Prog/Fund, Delivery Location, %

Line – Each item requested
Form – Description, Qty, UOM, Category, Price, Ship To, Status

Schedule – Delivery: Ship To, Due Date, Qty, Price
Distribution – Account/Dept/Prog/Fund, Delivery Location, %

Schedule – Delivery (each line will have 1 or more schedules)
Distribution – Account/Dept/Prog/Fund, Delivery Location, %
Distribution – Account/Dept/Prog/Fund, Delivery Location, %

Gray areas indicate that multiple schedules and distributions are permitted for each line.

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Basic steps for Requisitioning

Header

1. Add a new requisition to the system
2. Select the recommended vendor on the Header Defaults
3. Select a Ship To location on the Header Defaults
4. Verify that the Default Distribution has been brought in successfully

Line

5. Enter a Description for the item to be requested
6. Enter the quantity, unit of measure, category, and price
7. Verify the Ship To location from the Header Defaults

Schedule

8. Verify that the schedule information has been defaulted in from the Header and Line correctly
9. Insert any additional schedules that are required (normally only one schedule is required)

Distribution

10. Verify that the Default Distribution has been brought in successfully
11. If distribution needs to be changed,
 - Account: select the Account from the dropdown
 - Department: use the SpeedChart dropdown to select a valid Dept/Program/Fund

Following Entry

12. Click the [**Approval**] button

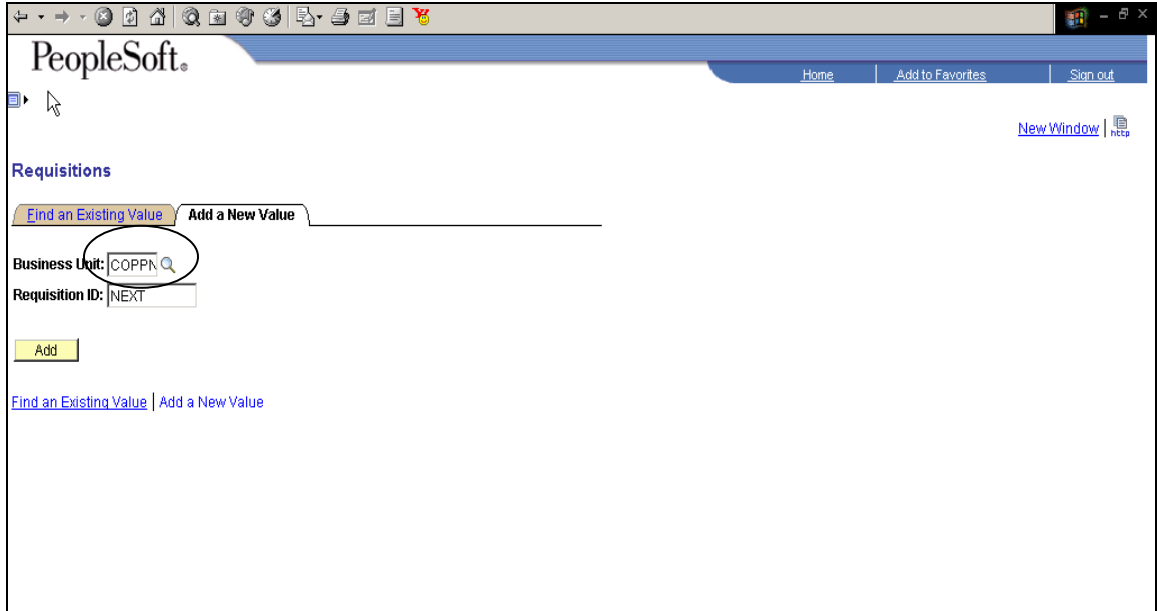
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Adding a Requisition

Navigation ***Purchasing > Requisitions > -Maintain Requisitions***

Business Unit: Enter **COPPN** or select from the Lookup.

Click **Add**.



The screenshot shows the PeopleSoft web interface for adding a new requisition. The page title is "Requisitions" and the sub-tab is "Add a New Value". The "Business Unit" field contains "COPPN" and is circled in red. The "Requisition ID" field contains "NEXT". A yellow "Add" button is visible below the fields. The page also includes navigation links for "Find an Existing Value" and "Add a New Value" at the top and bottom.

Requisition Id: NEXT – the word **NEXT** informs PeopleSoft to assign the next available requisition number.

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The **Form** screen should appear:

The screenshot displays the PEOPLE Soft Requisition Form interface. At the top, there is a navigation bar with the PEOPLE Soft logo, a search bar, and links for Home, Worklist, Add to Favorites, Sign out, New Window, and Help. The main form area is titled 'Form' and includes a 'Schedule' tab. The header information includes: Unit: US001, Req ID: NEXT, Req Date: 04/24/2002, Origin: ONL, Requester: VP1, Status: Approved, and Currency: USD. A table with columns Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, and Status is shown. Below the table are summary fields for Total Amt and Total Base Amt, and a 'Go to:' menu with options like Header Defaults, Header Comments, Item Search, Item Detail, Line Defaults, and Line Details. At the bottom are buttons for Save, Notify, Refresh, Add, and Update/Display.

The information at the top of this screen is Header information and pertains to the entire Requisition.

Requester: Should contain your **User ID** with your name displayed next to you ID.

Req Date: Defaults in as Today's date. This date will only be changed if a Requisition has been on hold for more than one day. The date should be changed to today's date so that the requisition will truly represent the date that the request was made.

Origin: Defaults from your User ID setup. Can be changed if a more appropriate origin is to be assigned.

Currency: **USD** – will always be USD

Click: [Header Defaults](#) .

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Header Defaults

The header defaults screen allows the user to enter data that will be applied to each line, schedule, or distribution of the requisition line after the requisition has been create.

Unit: COPPN Req ID: NEXT

Default Options
 Default Override

Item Defaults
Vendor: Location:
[Vendor Lookup](#)
Buyer:
Ship To: CENTRAL RECEIVING
Due Date: Category: UOM:
Distribute by: SpeedChart:

Distributions
Customize | Find | View All | First

Dist	Percent	GL Unit	Dept	Project	Account	Program	Fund Code	Bud Ref	Budget Date	Location
1		COPPN							06/04/2004	PROC

OK Cancel Refresh

Vendor: Tax ID of the merchant.

Location: Not required to be entered.

Vendor Lookup – we'll explore this in a little more detail below.

Buyer: Not required to be entered.

Ship To: **RECV** – this is the code for the location of Central Receiving. This code will be defaulted into the Ship To location of each Schedule.

Due Date: Today's Date or the date that the goods are to be received. This code will be defaulted into the Ship To location of each Schedule.

Category: Requesters will typically use either: A-2WAY MATCH or A-3WAY MATCH.

The category is used to identify what type of good or service is being requested. It also identifies the requirements PeopleSoft will use for Matching the PO, Receiving, and Voucher. This code will be defaulted into the Category field of

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each Line. **Caution:** *If any item that is being requested is NOT in this Category then it will have to be changed manually at the time the line is added.*

Unit of Measure: Each (EA) is the most popular. Select the most appropriate UOM that describes the quantity that will be used to order and receive the goods. This UOM code will be defaulted into the UOM field of each Line. **Caution:** *If any item that is being requested is NOT in this UOM then it will have to be changed manually at the time the line is added.*

Speed Chart: Abbreviation of a combination of Dept/Program/Fund. This will enable the user to select a valid Dept/Program/Fund without having to enter each field separately.

Distributions – this is the default and will be applied to every Line on the Requisition. (Coppin's distribution may look a little different, have changed the order to make it easier for entry.)

Percent: This is the percentage of each line that will be charged to the Account/Department that is listed on the same line.

GL Unit: **COPPN** – is always COPPN

Account: The GL account to which the items on the line are being charged. (What)

Department: Use the Speed Chart field to populate the department/program/fund combination.

Location: This field should default from your User ID. This field is the delivery location of the person making the request. Will be **RECV**, unless every campus location has been identified and attached to each requester.

Hint: **If you have a need to navigate to a different menu location, to lookup the cross-reference from a FRS Account to a PeopleSoft Department as an example, you may not be able to do so without losing your current work. Instead of leaving your current menu location, you can click on 'New Window' in the upper right corner of the screen. This will allow you to navigate to another screen without disturbing the work you are performing. Once you are finished with the 'New Window', close it and you will return to your original location.**

Click on the **Vendor Lookup** link. [Vendor Lookup](#)

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Header Defaults - Retrofit

PeopleSoft. Home Worklist Add to Favorites Sign out

Menu

- Requisitions
 - Reconcile Requisitions
 - Review Requisition Information
 - Reports
 - Maintain Requisitions**
 - Approve Amounts
 - Approve ChartFields
 - Request Requisitions
 - Load Requisitions
 - Update Drop Shipments
 - Budget Check
 - Entry Event Request
 - Purge Requisition Load Regsts
 - Approval Workflow
 - Request for Quotes
 - Procurement Contracts
 - Purchase Orders
 - Supplier Schedules
 - Procurement Cards
 - Shipments
 - Return To Vendor
 - Analyze Procurement
 - Inventory
 - eProcurement
 - Sourcing
 - Engineering
 - Manufacturing Definitions
 - Production Control
 - Configuration Modeler
 - Product Configurations
 - Quality
 - Grants
 - Projects
 - Engagement Planning
 - Resource Management

Retrofit field changes to "all" existing requisition lines/schedules/distributions....

Unit: COPPN Req ID: NEXT

For the distribution specific defaults, Select 'Apply' to apply changes to the Distrib Line value. For example, if you select Apply for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.

Select 'Apply to All Distributions' to apply changes to all distribution lines on the requisition.

Mark All Unmark All

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Ship To	RECV	
<input checked="" type="checkbox"/>	1	Budget Date	2004-06-04	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Location	PROC	<input type="checkbox"/>

OK Cancel Refresh

Defaults: If you want to use the values that were just selected on the Header Default page. This will set the Vendor, Ship To, Location, etc... on every line of the requisition.

Click Mark All

Click .

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New Vendor Info

The screenshot displays the PeopleSoft Requisition system interface. At the top, there is a search bar and navigation links for Home, Worklist, Add to Favorites, and Sign out. Below this, the 'Form' tab is active, showing a 'Schedule' sub-tab. The main form area contains fields for Unit (US001), Req ID (NEXT), Req Date (04/24/2002), and Origin (ONL). There is also a field for Requester (VP1) and a checkbox for 'Hold From Further Processing'. The Status is 'Approved' and the Currency is 'USD'. A table below shows a single line item with a quantity of 0.0000 and a price of 0.00000. At the bottom of the form, there are several navigation links: 'Header Defaults', 'Header Comments' (circled in red), 'Item Search', 'Item Detail', 'Line Defaults', and 'Line Details'. There are also buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'. An arrow points from the 'Header Comments' link to the text below.

When to use: Vendors that can not be found by doing the Vendor Lookup.

Vendor Info: Vendor Information can be sent to the Buyer within the Requisition. Simply click the Header Comments icon to enter the vendor information.

A screen will appear to allow the user to enter information the buyer should know about:

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Header Comments

PeopleSoft.

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help

Header Comments

Unit: SALIS Req ID: NEXT

Comments Find | View All First 1 of 1 Last

Active Only *Sort Method: Comment Time Sta *Sort Seq: Ascending

Comments:

Send to Vendor Shown at Receipt Shown at Voucher

Associated Document

File Name: File Extension:

Standard Comments GoTo Source Fetch Item Specs

OK Cancel Refresh

Enter the information the buyer will need to know to add a new vendor to PeopleSoft prior to creating the PO.

Things like: Federal Tax ID (SSN or TIN)
Name
Address
City, State & Zip

When finished entering the information you would like the buyer to know:

Be careful: If you click these buttons this information will be passed to those people!!

Send to Vendor Shown at Receipt Shown at Voucher

Clicking these boxes will pass your comments on to those people.

Click .

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Adding Lines

The screenshot shows the 'Maintain Requisitions' page in Microsoft Internet Explorer. The browser address bar shows the URL: http://tweety.coppin.edu/psp/psfntst/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL. The PeopleSoft logo is visible at the top left. The page title is 'Maintain Requisitions - Microsoft Internet Explorer'. The browser menu bar includes File, Edit, View, Favorites, Tools, and Help. The address bar has Back, Forward, Home, Search, Favorites, Media, and Go buttons. The main content area shows the 'Form' tab with a 'Schedule' sub-tab. The requisition details include: Unit: COPPN, Req ID: NEXT, Req Date: 06/04/2004, Origin: ONL, Requester: fnconsult4, Cedar Consultant - George, Status: Open, Budget Status: Not Chk'd, Accounting Date: 06/04/2004, Currency: USD, Dollar. A table with one line item is displayed: Line 1, Item ID (blank), Description: Copy Paper, Req Qty: 5.0000, UOM: BOX, Category: SUP-OFF, Price: 3.50000, Ship To: RECV, Status: Active. The total amount is 17.50 USD. Navigation links include Header Defaults, Header Comments, Item Search, Item Detail, Line Defaults, Line Details, Copy From, Catalog, Line Comments, and Sourcing Controls. Action buttons include Save, Notify, Refresh, Add, and Update/Display.

Item ID: Not Required to be entered.

Description: Enter a description of the item to be requested.

Req Qty: Enter the full quantity of the item to be requested.

Unit Of Measure: Should default from header defaults. However, if the UOM is different for this item from the header defaults, use the drop down and select a different UOM that better describes the UOM for ordering and receiving. This will be done if the number of items is large and they vary in type.





Category: Should default from header defaults. However, if the Category is different for this item from the header defaults, use the drop down and select a different Category that better describes the UOM. This will be done if the number of items is large and they vary in type.

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Price: Enter the Price for each UNIT, not the total price of the items, but rather the individual cost of each item. The system will multiply the Qty * Price to arrive at the Total Cost. In order to get the exact price of items that are sold in lots, you need to extend out the use of decimal places.

Additional Lines

In order to add additional lines you simply click on the  key and you will be prompted to enter the number of rows to add.

Schedule Before proceeding to the  tab you must select the line that you want to review the schedule for. Click the Sel box on the Form screen for one of the lines.

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Schedule

Click on the [Schedule](#) Tab at the top of the screen.

The screenshot shows the 'Maintain Requisitions' screen in Microsoft Internet Explorer. The browser address bar shows the URL: http://tweety.coppin.edu/psp/csfntst/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL. The PeopleSoft logo is at the top left, and navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' are at the top right. Below the logo, there are tabs for 'Form' and 'Schedule', with 'Schedule' being the active tab. The main content area shows 'Unit: COPPN' and 'Req ID: NEXT'. A table for 'Line: 1 Copy Paper' is displayed, with a sub-table for 'Schedule'. The sub-table has columns: 'Sel', 'Sched', '*Ship To', 'Due Date', 'Req Qty', 'Price', 'Amount', and 'Status'. The first row shows '1', 'RECV', a search icon, a date field, '5.0000', '3.50000', '17.50', and 'Active'. Below the table, 'Req Qty: 5.0000' and 'Amount: 17.50 Dollar' are shown. There are links for 'Distribution', 'Shipment Detail', 'Drop Shipment', 'Ship To Address', and 'One Time Address'. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Verify that the Schedule data has defaulted from the User ID or the Header Defaults. Click **View All** to display all lines entered on Form tab.

In order to add additional lines you simply click on the [+](#) key and a new row will appear. If additional lines are added the sum of the schedule lines **MUST** be equal to the total quantity entered on the **Form** screen.

The use of schedules is rare unless you are making large orders for materials to be delivered over time. This usually involves things like construction projects.

Click on the [Distribution](#) link to review the Accounting information.

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Distribution (Accounting)

Maintain Requisitions - Microsoft Internet Explorer
Address: http://tweety.coppin.edu/psp/csfntst/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL

PeopleSoft.
Home | Worklist | Add to Favorites | Sign out

New Window | Help

Distribution Information

Req ID: NEXT Line: 1 Sched: 1 [Copy Paper](#) ✖

Ship To: RECV RECEIVING Open Amt: 17.50

*Distribute by: Amt SpeedChart: 1020 [Multi-SpeedCharts](#)

Distributions Customize | Find | View All | First 1 of 1 Last

Sel	Dist Status	Location	Amount	Percent	GL Unit	Dept	Project	Account	Program	Fund	Bud Ref
<input type="checkbox"/>	1 Open	PROC	17.50	100.0000	COPPN	2301020		090201	00401	4010	

Req Qty: 5.0000 BOX Amount: 17.50 USD

[Exchange Rate Detail](#)

OK Cancel Refresh

Distributions – this Distribution is the accounting information for only this LINE.

Selecting *Distribute by: allows the Accounts Payable dept to make payments if this item is invoiced across more than one invoice.

Percent: This is the percentage of each line that will be charged to the Account/Department that is listed on the same line.

GL Unit: **COPPN** – is always COPPN

Account: The GL account to which the items on the line are being charged. (Note: copy the account before using speedchart, the speedchart will blank out the account number)

Department: Use the Speed Chart field to populate the department/program/fund combination.


Speed Chart: Abbreviation of a combination of Dept/Program/Fund. This will enable the user to select a valid Dept/Program/Fund without having to enter each field separately.

Location: This field should default from your User ID. This field is the delivery location of the person making the request. Will be **RECV**, unless every campus location has been identified and attached to each requester.

Click .

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
Saving the Requisition

Click on the  Tab at the top of the screen.

Unit: COPPN Req ID: 0000000012 *Req Date: 06/04/2004 Origin: ONL
*Requester: wgreene Watina Greene Hold From Further Processing
Status: Pending Budget Status: Not Chkd Accounting Date: 06/04/2004 Currency: USD Dollar
Line
Sel Line Item ID Description Reg Qty UOM Category Price Ship To Status
1 Copy Paper 5.0000 BOX SUP-OFF 3.50000 RECV Active
Total Amt: 17.50 USD Total Base Amt: 17.50 USD
*Go to: Header Defaults Header Comments Item Search Item Detail Line Defaults Line Details
Catalog Line Comments Sourcing Controls ...More...
Save Notify Refresh Add Update/Display
Form | Schedule

Click .

The requisition does NOT exist in PeopleSoft until you click the  button.

Once you click the  button, the requisition is saved in PeopleSoft and the word **NEXT** in **Req ID**: is assigned the next available number.

The **Status**: should be **Open** or **Pending** depending on what security has been set up for each user.

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Hold – until complete

The screenshot shows the PEOPLE Soft requisition system interface. At the top, there is a search bar and navigation links for Home, Worklist, Add to Favorites, and Sign out. Below this, the 'Form' tab is active, and the 'Schedule' sub-tab is selected. The requisition details include: Unit: US001, Req ID: NEXT, Req Date: 06/17/2002, Origin: ONL, Requester: VP1, Atamian, Wes, Status: Approved, Budget Status: Not Chk'd, Accounting Date: 06/17/2002, and Currency: USD. A table lists four requisition lines, all with a quantity of 144.0000 and a price of 20.00000. Line 4 is selected. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display. The 'Hold From Further Processing' checkbox is circled in red, and the 'Save' button is also circled in red. A red arrow points from the 'Save' button to the 'Hold From Further Processing' checkbox.

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1	10000	Long Sleeve Biking Jersey, Men	144.0000	EA	CYCLING	20.00000	US001	Active
2	10003	Long Sleeve Biking Jersey, Wom	144.0000	EA	CYCLING	25.00000	US001	Active
3	10007	Sidepocket Short's, Women's	144.0000	EA	CYCLING	20.00000	US001	Active
4	10008	Switchback Mt. Biking Shorts,	144.0000	EA	CYCLING	20.00000	US001	Active

If the Requisition you are entering is not ready to be sent to the Approver for any reason you can set the Requisition to HOLD so that no further action can be taken by the Approver nor the Buyer. For instance, the Requisition is only partially entered or there is some question about the Requisition that needs to be clarified prior to processing it.

Click on the **Hold from Further Processing** checkbox to **HOLD** the Requisition.

The **HOLD** does NOT take effect until you click the **Save** button.

To take the HOLD off you simply click the **Hold from Further Processing** again.

Don't forget to Click **Save** after you take the **HOLD** off.

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Notify

The screenshot shows the PeopleSoft Requisition system interface. At the top, there is a search bar and navigation links for Home, Worklist, Add to Favorites, and Sign out. Below this, there are links for New Window and Help. The main form area is titled 'Form' and 'Schedule'. It contains fields for Unit (US001), Req ID (NEXT), Req Date (06/17/2002), and Origin (ONL). There is also a field for Requester (VP1) and a checkbox for 'Hold From Further Processing'. The Status is 'Approved' and Budget Status is 'Not Chkd'. The Accounting Date is 06/17/2002 and the Currency is USD. Below this is a table with columns: Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, and Status. The table contains four rows of items, all with a quantity of 144.0000 and a price of 20.00000. The fourth row is selected. Below the table, there are fields for Total Amt (12,240.00 USD) and Total Base Amt (12,240.00 USD). At the bottom, there are navigation links for 'Go to: Header Defaults, Header Comments, Item Search, Item Detail, Line Defaults, Line Details, Copy Form, Catalog, Line Comments, Sourcing Controls, ...More...'. There are also buttons for Save, Notify, Refresh, Add, and Update/Display. The 'Notify' button is circled in red.

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1	10000	Long Sleeve Biking Jersey, Men	144.0000	EA	CYCLING	20.00000	US001	Active
2	10003	Long Sleeve Biking Jersey, Wom	144.0000	EA	CYCLING	25.00000	US001	Active
3	10007	Sidepocket Short's, Women's	144.0000	EA	CYCLING	20.00000	US001	Active
4	10008	Switchback Mt. Biking Shorts,	144.0000	EA	CYCLING	20.00000	US001	Active

Once the Requisition is complete:

- All Lines are added to the Req
- All Schedules are correct
- All Distribution (accounting) has been assigned correctly

You are now ready to **Notify** the Approver that the Requisition is complete and ready for Approval.

You can create an email message directly from PeopleSoft using the  button.

Click the  button.

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Notify Screen

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.
Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

[Lookup Recipient](#) [Delivery Options](#)

To:

CC:

BCC:

Priority:

Subject: <Enter Subject here>

Template Text: Workflow Notification
Priority: %NotificationPriority
Date Sent: 2003-06-10

Message:

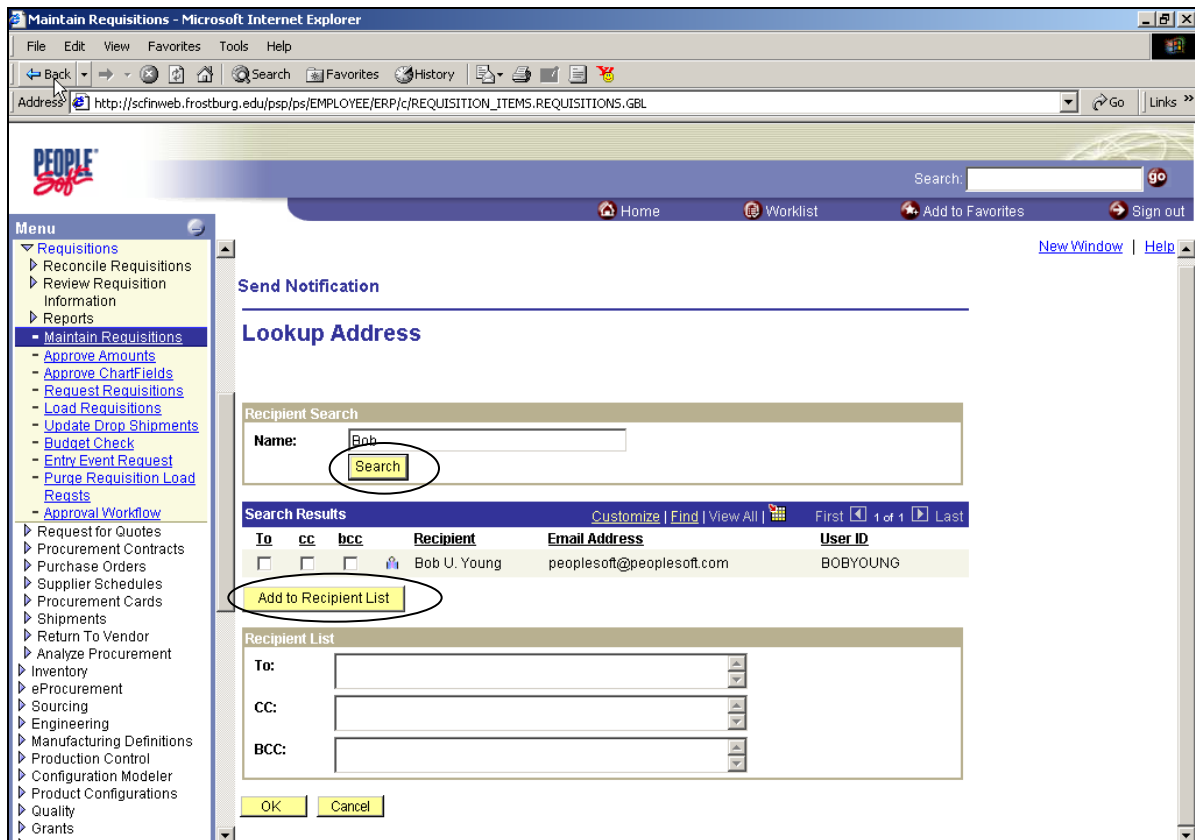
Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.
Click Apply to send this notification and remain on this page.

You first must select who you want to send the Notification to:

Click on the [Lookup Recipient](#) link to assign the users you want to notify.

You should get the following screen:

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In the **Name:** field enter the name of the person you wish to Notify.

Click **Search**.

A list of users who have this name should appear. That might be many users or a single user. It depends on how many users meet the criteria.

From the list of users you then Click the **To:** checkbox next to the user's name to tell the system which user to send the Notification to. You can select more than one user if those users all appear on the same search.

Once you have selected the user **To:** notify, click the **Add to Recipient List** button which will make the user's name appear in the Recipient List at the bottom.

You may perform this process several times to send the notification to more than one user.

Once all users are on the list Click **OK**.

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The screenshot shows a web browser window titled "Maintain Requisitions - Microsoft Internet Explorer". The address bar shows the URL: http://sclinweb.frostburg.edu/ps/ps/EMPLOYEE/ERP/c/REQUISITION_ITEMS.REQUISITIONS.GBL. The page features a "PEOPLE Soft" logo and a navigation menu on the left. The main content area is titled "Send Notification" and includes instructions: "Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator. Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send." Below this is a "Notification Details" section with fields for "To:", "CC:", "BCC:", "Priority:", "Subject:", "Template Text:", and "Message:". The "Subject:" field contains the placeholder text "<Enter Subject here>". The "Template Text:" field contains "Workflow Notification" and "Priority: %NotificationPriority". The "Message:" field is empty. At the bottom of the form are three buttons: "OK", "Cancel", and "Apply".

Enter a subject in the **Subject:** field and any comments you want to send to the users in the **Message:** field.

Click to send the message.

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Approval

Requisition approvals must be done by someone who is set up with 'Approval' authority in PeopleSoft and who has access to documents created by specific requesters. Approvers are not permitted to add requisitions. Conversely, requesters are not permitted to approve requisitions.

The screenshot shows the PeopleSoft Requisition Schedule form. The status is 'Approved' and the origin is 'ONL'. The requisition is for four items, all with a quantity of 144.0000. The total amount is 12,240.00 USD. The 'Origin' field is circled, and a checkmark in a box is visible next to it. The 'Status' field is also circled.

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1	10000	Long Sleeve Biking Jersey, Men	144.0000	EA	CYCLING	20.00000	US001	Active
2	10003	Long Sleeve Biking Jersey, Wom	144.0000	EA	CYCLING	25.00000	US001	Active
3	10007	Sidepocket Short's, Women's	144.0000	EA	CYCLING	20.00000	US001	Active
4	10008	Switchback Mt. Biking Shorts,	144.0000	EA	CYCLING	20.00000	US001	Active

The Approval process is fairly simple! The approval process applies to the entire Requisition not just single lines.

Once the Requisition is verified:
The Approver must click the **Approve** button (looks like a )
The **Status**: should change to **Approved**

** Note ** - Only certain users have the security to Approve Requisitions

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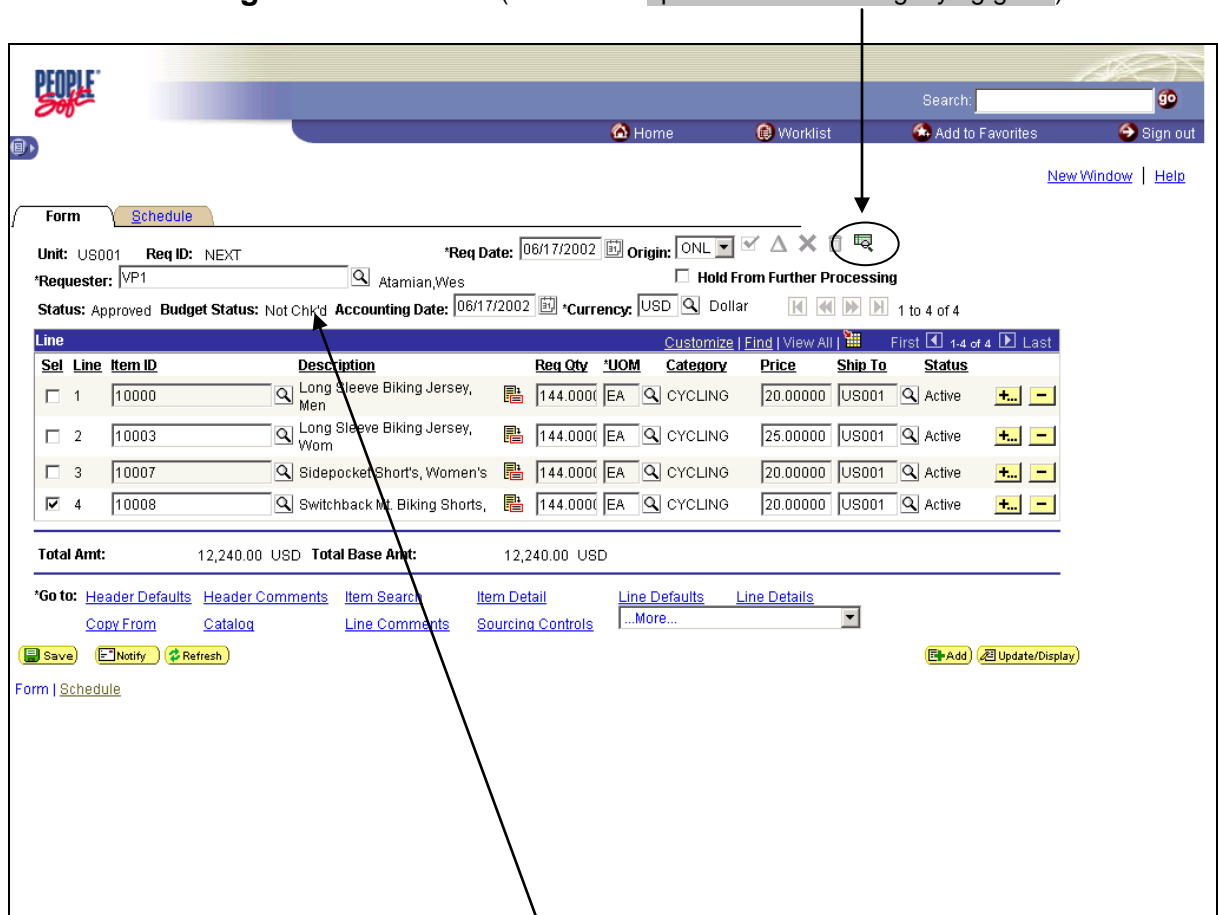
Budget Check

In order to Budget Check, you must be looking at the Requisition you want to Budget Check.

The Budget Check process is fairly simple! The Budget Check process applies to the entire Requisition but checks each line one at a time.

The Requisition must be Approved before Budget Checking. Therefore, the Approver will be Budget Checking the Requisition.

Click the  **Budget Check** button (looks like a spreadsheet with magnifying glass)



The screenshot shows the PeopleSoft Requisition interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' buttons. Below this is a search bar and 'New Window' and 'Help' links. The main content area is titled 'Form | Schedule'. It displays various fields for requisition details: Unit: US001, Req ID: NEXT, Req Date: 06/17/2002, Origin: ONL, Requester: YP1, Status: Approved, Budget Status: Not Chkd, Accounting Date: 06/17/2002, Currency: USD. A table lists four requisition lines with columns for Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, and Status. Line 4 is selected. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display. A red circle highlights the 'Budget Check' button icon in the top right corner of the form area.

The **Budget Status:** should change to **Valid**

The Budget Check does an automatic save but it never hurts to Click 

** Note ** - Only certain users have the security to Budget Check Requisitions

Requisition Guide for Requesters

2.0 Copying a Requisition from a Previous Requisition

Navigation

Purchasing > Requisitions > -Maintain Requisitions

Create a Requisition using the normal process (see pg. 15)

The screenshot displays the PEOPLE Soft Requisition system interface. At the top, there is a search bar and navigation links for Home, Worklist, Add to Favorites, and Sign out. The main content area is titled 'Form' and has a 'Schedule' tab selected. The requisition details include: Unit: US001, Req ID: NEXT, Req Date: 04/25/2002, Origin: ONL, Requester: VP1, Status: Approved, and Currency: USD. A table with one line item is shown below, with columns for Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, and Status. The total amount is 0.00 USD. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display, along with a 'Go to' menu containing options like Header Defaults, Header Comments, Item Search, Item Detail, Line Defaults, Line Details, Copy From, Catalog, Line Comments, and Sourcing Controls.

The Copy From option allows you to use an already existing Requisition to create a new Requisition. Much of the data from the original Requisition is copied into the new Requisition, however, the Approval & Budget Statuses are NOT.

Click [Copy From](#).

The Copy From screen appears.

Requisition Guide for Requesters

PEOPLE Soft

Search: go

Home Worklist Add to Favorites Sign out

[New Window](#) | [Help](#)

Copy Requisition

Business Unit: US001

Requisition ID: 🔍

OK Cancel Refresh

It simply asks you which Requisition you'd like to copy.

Enter the Requisition ID: or click the 🔍 Lookup button to find the Requisition

Click .

When the OK button is clicked the data from the original Requisition is copied into the new requisition.

Requisition Guide for Requesters

PEOPLE Soft

Search: [] GO

Home Worklist Add to Favorites Sign out

New Window Help

Form Schedule

Unit: US001 Req ID: NEXT Req Date: 06/19/2002 Origin: ONL

Requester: VP1 Atamian, Wes Hold From Further Processing

Status: Approved Currency: USD Dollar 1 to 4 of 4

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1	10000	Long Sleeve Biking Jersey, Men	44.0000	EA	CYCLING	20.00000	US001	Active
2	10003	Long Sleeve Biking Jersey, Women	44.0000	EA	CYCLING	25.00000	US001	Active
3	10007	Sidepocket Short's, Women's	44.0000	EA	CYCLING	20.00000	US001	Active
4	10008	Switchback Mt. Biking Shorts,	44.0000	EA	CYCLING	20.00000	US001	Active

Total Amt: 12,240.00 USD Total Base Amt: 12,240.00 USD

Go to: Header Defaults Header Comments Item Search Item Details Line Defaults Line Details
Copy From Catalog Line Comments Sourcing Controls ...More...

Save Notify Refresh Add Update/Display

Form | Schedule

Make sure you update the **Req Date:** so it is set for today's date.

Make any other changes to Header, Line, Schedule or Distribution information.

Click .

Follow the normal process for Approval and Budget Checking.

Requisition Guide for Requesters

3.0 Canceling a Requisition

Navigation **Purchasing > Requisitions > -Maintain Requisitions**

The screenshot displays the 'Maintain Requisitions' interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' buttons. Below this is a search bar and a 'go' button. The main content area is titled 'Form' and 'Schedule'. It shows a requisition with the following details:

- Unit: US001, Req ID: NEXT, *Req Date: 06/17/2002, Origin: ONL
- *Requester: VFP1, Atamian, Wes
- Status: Approved, Budget Status: Not Chk'd, Accounting Date: 06/17/2002, *Currency: USD

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1	10000	Long Sleeve Biking Jersey, Men	144.0000	EA	CYCLING	20.00000	US001	Active
2	10003	Long Sleeve Biking Jersey, Women	144.0000	EA	CYCLING	25.00000	US001	Active
3	10007	Sidepocket Short's, Women's	144.0000	EA	CYCLING	20.00000	US001	Active
4	10008	Switchback Mt. Biking Shorts,	144.0000	EA	CYCLING	20.00000	US001	Active

Below the table, it shows 'Total Amt: 12,240.00 USD' and 'Total Base Amt: 12,240.00 USD'. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'. A red circle highlights the 'X' button in the top right corner of the requisition header area.

In order to Cancel a Requisition you must be looking at the Requisition you want to cancel. If you have been working the Requisition and it is still in front of you then you can proceed directly to Cancel. If not, to Find an Existing Requisition see page 30

Verify that the Requisition in front of you is the Requisition you wish to delete.

Click on the **Update Display** button to change the mode.

Click the Cancel button (looks like a big **X**)

The **Status:** should change to **Cancelled**

The Cancel takes effect the minute you click Cancel.

**** Note **** - Only certain users have the security to Cancel Requisitions

Requisition Guide for Requesters

4.0 Inquiry/Tracking a Requisition

As the Requester you can review the Requisition or track the status of that Requisition.

Select **Purchasing > Requisitions > Review Requisition Information > -Requisitions**

The screenshot shows the PeopleSoft web interface for a Requisition Inquiry. The left-hand menu is expanded to 'Purchasing > Requisitions > Review Requisition Information > -Requisitions'. The main content area is titled 'Requisition Inquiry' and contains several search fields: Business Unit (COPPN), Requisition ID, To Req, Req Status, Origin, Requester, Requisition Date (To), Vendor Set ID (COPPN), Vendor ID, Short Vndr Name, Item SetID (COPPN), and Item ID. There are also fields for Descr and Department, with a 'Drop Ship' checkbox. At the bottom of the form are 'OK' and 'Cancel' buttons.

If you click OK you will get a list of ALL Coppin Requisitions.

This may be a big list that can be narrowed down by entering as many of the fields that you'd like to specify which requisition you would like to review.

Click on the Requisition (blue) that you would like to view or work on.

Click .

Requisition Guide for Requesters

Inquiry Details Tab

The screenshot shows the PeopleSoft Requisitions Inquiry Details screen. The 'Status' column in the table is highlighted with a yellow circle. Below the table, there are several blue links: Search, Approval History, Header Comments, and Document Status. A 'Notify' button is also visible.

Unit	Requisition	Status	Requester	Reg Date	Total Amt	Currency
<input checked="" type="checkbox"/>	COPPN	000000003	Pending	Thomas Dawson	05/27/2004	50.000 Dollar
<input type="checkbox"/>	COPPN	000000002	Open	Thomas Dawson	05/27/2004	288.000 Dollar
<input type="checkbox"/>	COPPN	000000001	Open	Thomas Dawson	05/27/2004	48.000 Dollar

The Inquiry Details screen shows you all the requisitions selected. It gives very brief information about each requisition.

You can see the specific requisition by clicking the Requisition ID: (in blue)

To see any of the topics in blue at the bottom you must first put a check mark in front of the Requisition you want to see.

Note before leaving this screen that the **Status** of the Requisition is listed beside the Requisition ID:

Interesting that the Status is on this screen but the label on the tab for the next screen is **Status**.

Click on the [Status](#) tab.

Requisition Guide for Requesters

Inquiry Status

The screenshot displays the PeopleSoft Requisitions Inquiry Status screen. The interface includes a menu on the left, a header with navigation links, and a main table area. The table has columns for Unit, Requisition, Status, Requester, Reg Date, and Total Amt Currency. A yellow box with an arrow icon is highlighted over the Status column header. Below the table, there are several links and buttons for further actions.

Unit	Requisition	Status	Requester	Reg Date	Total Amt	Currency
<input checked="" type="checkbox"/>	COPPN	000000003	Pending	Thomas Dawson	05/27/2004	50.000 Dollar
<input type="checkbox"/>	COPPN	000000002	Open	Thomas Dawson	05/27/2004	288.000 Dollar
<input type="checkbox"/>	COPPN	000000001	Open	Thomas Dawson	05/27/2004	48.000 Dollar

Search Approval History Header Comments Document Status
Show RFQ Show PO Show Receipts Show MSR Show Voucher / Payment

Notify

The Inquiry Details screen shows you all the requisitions selected. It gives very brief information about each requisition.

The columns on the [Status](#) tab show the progression of the Requisition. If there is a Y next to the Requisition ID: then this requisition has been progressed further along the procurement path.

You can inquire on the **RFQ**, **PO**, **Received**, and **Voucher** by clicking on the **Y** (blue).

The yellow box with the arrow in it shows you both screens at once when it is clicked.