

# PURCHASING FROM OFFICE SUPPLY QPA 10516

## Menu Navigation:

- eProcurement
- Create Requisition

Upon navigation you will come to the screen shown below. Notice that the step of process of creating a requisition is noted in yellow.

**QA Testing**

Home | Worklist | Add to Favorites | Sign out

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

**Business Unit:** 00061 Department of Administration

**Requester:** J005563 Geer, Jeania-300

**Requisition Name:**

**Priority:** Medium

**Line Defaults**

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

**Vendor:**  **Vendor Location:**

**Buyer:**  **Category:**  **Unit of Measure:**

**Shipping Defaults**

**Ship To:**  [Modify Shipping Address](#)

**Due Date:**  **Attention:**

**Accounting Defaults**

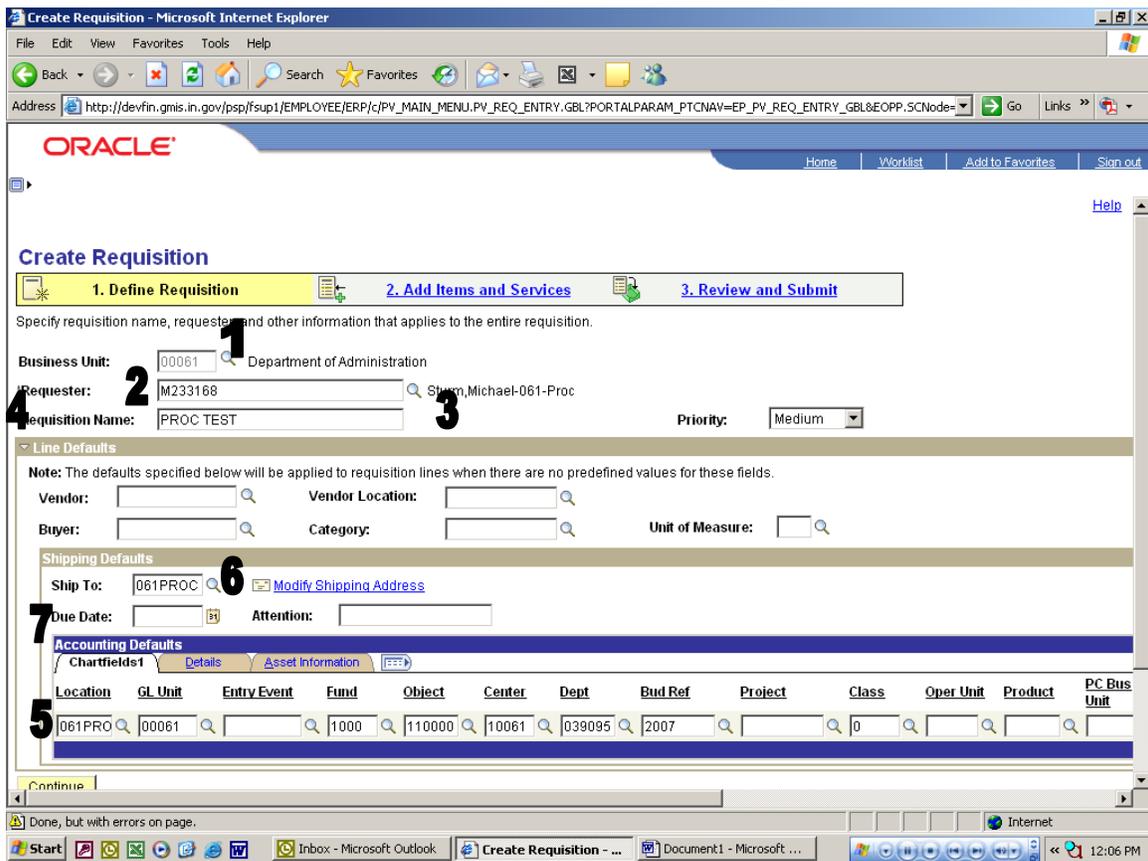
Chartfields1 | Details | Asset Information

Location	GL Unit	Entry Event	Fund	Object	Center	Dept	Bud Ref	Class	Oper Unit	Product	PC Bus Unit	Project
061PRO	00061	<input type="text"/>	1000	<input type="text"/>	<input type="text"/>	<input type="text"/>	2007	<input type="text"/>				

# Define Requisition

At the Define Requisition screen you are able to change or add several fields:

1. Business Unit
2. Requestor
3. Requisition Name
4. Line Defaults
5. Accounting Defaults (Chartfields)
6. Ship To location
7. Due Date (not required)



## 5. Accounting Defaults (Chartfields)

Edit if necessary all Chartfields as required by your agency. This includes but is not limited to: Location, GL Unit, Fund, Object, Center, Dept, Bud Ref (fiscal year of purchase) and Class (always 0)

## 6. Ship To Location

Click on the magnifying glass icon next to the Ship To field. A new page will open where you can search for and identify the appropriate Ship To code. In the Ship To Location field enter the 3-digit agency number, and click the Look Up button to be given a listing of all your agency Ship To locations.

**Look Up Ship To**

SetID:

Ship To Location:

Description:

[Basic Lookup](#)

**Search Results**

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

[View All](#) First  Last

Ship To Location	Description
<a href="#">022ISC1</a>	<a href="#">Indiana Supreme Court</a>
<a href="#">028ITC</a>	<a href="#">Indiana Tax Court</a>
<a href="#">030GOV1</a>	<a href="#">Governor's Office Rm 206</a>
<a href="#">030GOV2</a>	<a href="#">Governor's Office, Rm 116</a>
<a href="#">030GOVR</a>	<a href="#">Governor's Office/Residence</a>
<a href="#">032CJ11</a>	<a href="#">Criminal Justice, Procurement</a>
<a href="#">032CJ12</a>	<a href="#">CJI Council on Impaired and Da</a>
<a href="#">032CJ13</a>	<a href="#">CJI, Council for Drug Free In</a>
<a href="#">032CJ14</a>	<a href="#">CJI, Coroner's Training Board</a>
<a href="#">032CJ16</a>	<a href="#">Criminal Justice, Police Corp</a>
<a href="#">036SDA02</a>	<a href="#">SDA\IN Grain Buyers and Wareh</a>
<a href="#">036SDA03</a>	<a href="#">SDA\Div of Soil Conservation</a>
<a href="#">036SDA04</a>	<a href="#">SDA\ISDA Business Office</a>
<a href="#">036SDA1</a>	<a href="#">State Department of Agricultur</a>
<a href="#">038LTGOV1</a>	<a href="#">LT Governor/State House</a>
<a href="#">038LTGOV10</a>	<a href="#">LT Gov\Comm and Rural Affairs</a>

## 7. Due Date (not required field)

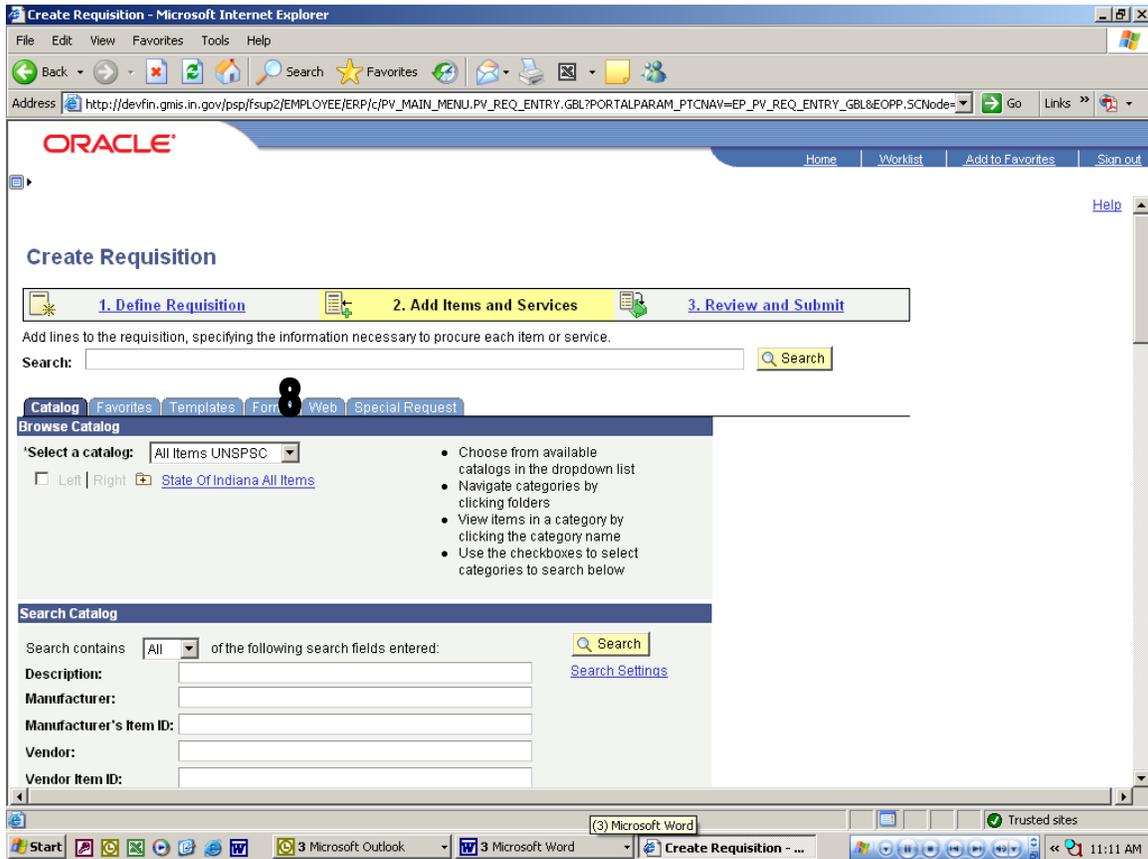
Enter date in MM/DD/YYYY format if needed or use the little calendar page icon to the right of the field for entry of the date.

Once all items 1 through 7 have been entered click the yellow Continue button or the 2. Add Items and Services button to pick the items from the vendor punch-out catalog.

## Add Items and Services

Once you have gotten to the Add Items and Services screen you will have to select the Web tab.

### 8. Web



### 8. Web

Use this tab when searching for items from the Staples punch-out catalog.

## Using Web based catalogs (Punch-out catalogs)

At the punch-out catalog page click the blue link labeled Staples.

**Create Requisition**

1. Define Requisition    2. Add Items and Services    3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog   Favorites   Templates   Forms   **Web**   Special Request

Logo	Merchant	Description
	<a href="#">ASAP</a>	
	<a href="#">Dell</a>	
	<a href="#">MSC Supply</a>	
	<a href="#">Grainger</a>	
	<a href="#">Commercial Lamp</a>	
	<a href="#">Staples</a>	
	<a href="#">DISYS</a>	

[Review and Submit](#)

Clicking on the link for the catalog will take you to the vendor web site. **Remember that while in the vendor web site you still have the 20 minute time frame to complete your order.**

Once you have found all items and checked out of the vendor web site you will be brought back to PeopleSoft and you will need to click the Review and Submit link to continue processing of the requisition.



Once you have navigated to the Staples catalog you will choose either market basket items (items on the QPA with the best pricing) or non-market basket items to be on your order. The processes used to order from market basket or non-market basket follow.

**You do not need to search the online catalog if you know the Product Codes for the items you wish to order (can visit [www.stapleslink.com](http://www.stapleslink.com) beforehand). You can just type the Product Codes and Quantities by clicking on the aqua colored button labeled Enter Several Items on the left hand side under Quick Order.**

# Finding Market Basket items in the Staples catalog

To search for items from the Market Basket click on the down arrow to the left of View All Lists. This will give you all the items available on QPA for purchase. Select the link that best describes the type of item you want to purchase. This will give you a break down of what types of items are under this broad category.



3 Create Requisition - Microsoft Internet Explorer

View All Lists  
Create New Lis

Adhesives  
Badges  
Batteries and P  
Binders  
Binding System  
Boards  
Breakroom Sup  
Calculators  
Calendars  
Carbonless Pap  
Card Filing  
Cash Handling  
Cassettes  
CDs  
Cleaning Suppl  
Clipboards  
Clips and Clamp  
Computer Acce  
Copy Paper  
Correction Sup  
Data Storage  
Desk Accessori  
Easels  
Envelopes  
Fasteners  
File Folders  
Flags

View All Lists  
Go

Home Worklist Add to Favorites Sign out

Staples Vendor # 22724  
QPA# 10516

View Order: **Submit**  
Items: 0  
Subtotal: \$0.00

Show Item Summary

Order Management  
My Order Status  
Returns  
Search for Orders

Office Supplies

- 2008 Calendars & Planners
- Basic Office Supplies
- Batteries
- Binders & Binder Accessories
- Business Cards, Letterhead & Forms
- Card Files
- Cases & Portfolios
- Cash Handling
- Custom Imprinted Products
- Desk Accessories
- Envelopes
- File Folders & Expanding Files
- Greeting Cards

Technology

- Calculators
- Computer Accessories
- Copiers
- Data Storage
- Drives
- Electronic & Accessories

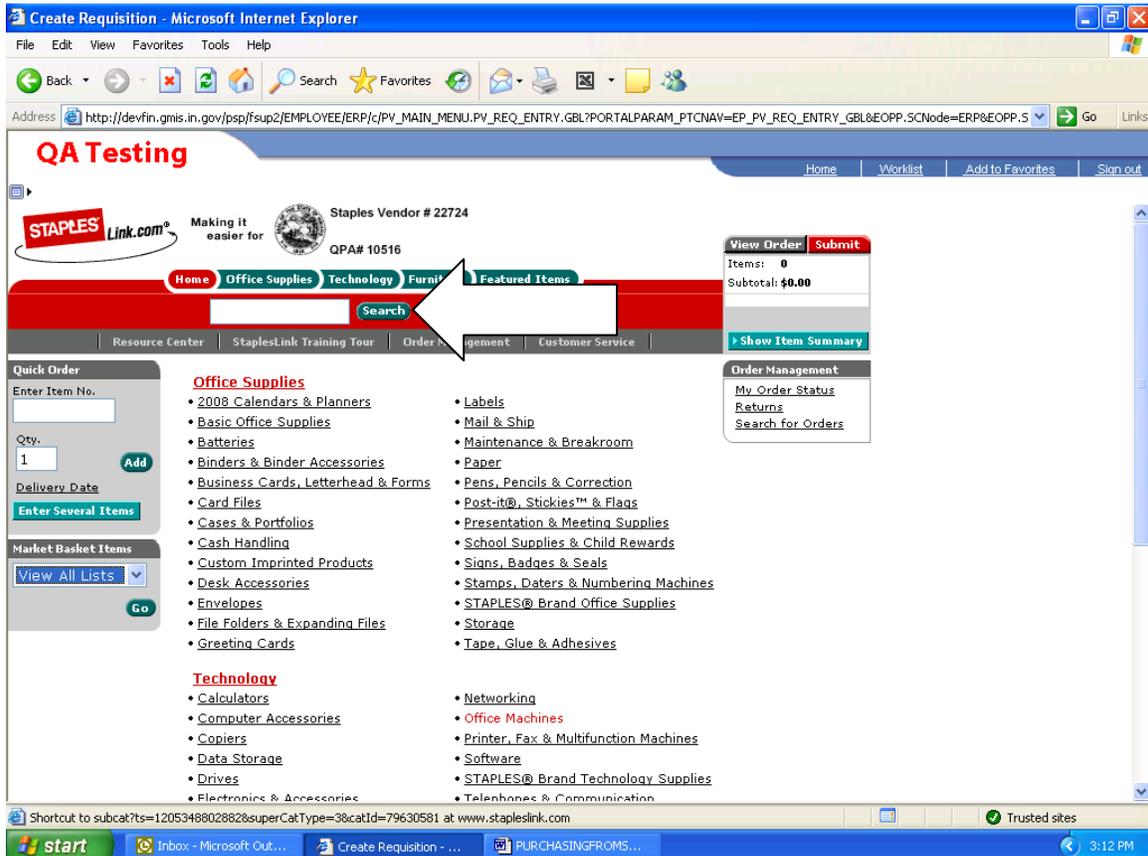
- Labels
- Mail & Ship
- Maintenance & Breakroom
- Paper
- Pens, Pencils & Correction
- Post-it®, Stickies™ & Flags
- Presentation & Meeting Supplies
- School Supplies & Child Rewards
- Signs, Badges & Seals
- Stamps, Daters & Numbering Machines
- STAPLES® Brand Office Supplies
- Storage
- Tape, Glue & Adhesives
- Networking
- Office Machines
- Printer, Fax & Multifunction Machines
- Software
- STAPLES® Brand Technology Supplies
- Telephones & Communication

Trusted sites

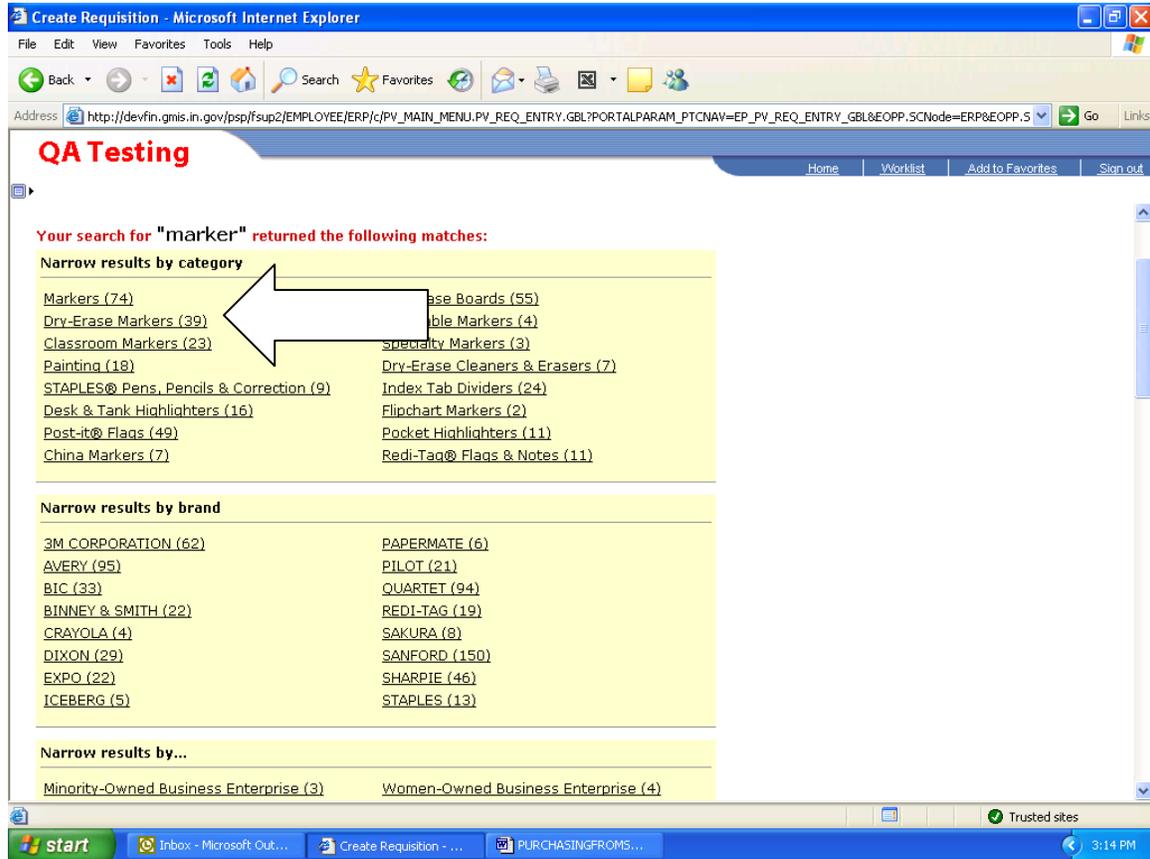
start | Inbo... Microsoft Out... | Create Requisition - ... | PURCHASINGFROMS... | 3:09 PM

# Searching By Keyword/Product number

To search by Keyword/Product # enter a keyword(s) or product number in the Search box and click Search and the system will try to find items that relate to your search.



To help refine your search you can click the category that most closely matches what you are looking for. You can search by category, by brand or by Minority Owned, Women Owned Business and Recycled items.



Microsoft Internet Explorer - Create Requisition

Address: http://devfin.gmis.in.gov/pspf/sup2/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?PORTALPARAM\_PTCNAV=EP\_PV\_REQ\_ENTRY\_GBL&EOPP\_SCNode=ERP&EOPP.S

## QA Testing

Home | Worklist | Add to Favorites | Sign out

Making it easier for 
 Staples Vendor # 22724  
 QPA# 10516

[Home](#) | [Office Supplies](#) | [Technology](#) | [Furniture](#) | [Featured Items](#)

marker  [Ink & Toner Finder](#)

[Resource Center](#) | [StaplesLink Training Tour](#) | [Order Management](#) | [Customer Service](#)

[View Order](#) | [Submit](#)  
 Items: 0  
 Subtotal: \$0.00  
[Show Item Summary](#)

[Back to original search results](#)

Your search for "marker" in Dry-Erase Markers returned the following matches:

All results displayed are in the category:

Dry-Erase Markers  
[Show results for all categories](#)

Narrow results by brand

<a href="#">AVERY (6)</a>	<a href="#">QUARTET (3)</a>
<a href="#">BIC (2)</a>	<a href="#">SANFORD (7)</a>
<a href="#">DIXON (3)</a>	<a href="#">STAPLES (2)</a>
<a href="#">EXPO (16)</a>	

Page 1 of 4 [Next >](#)

### Dry-Erase Markers

Customer Item No.	MFR Item No.	UOM/QTY	Your Price	Qty	Add to....
<a href="#">Hide Images</a>					

Done | | [Inbox - Microsoft Out...](#) | [Create Requisition - ...](#) | [PURCHASINGFROMS...](#) | | 3:21 PM

Market Basket items will be indicated by the words MARKET BASKET hi-lighted in blue

**QA Testing**

Home Worklist Add to Favorites Sign out

Your search for "marker" in Dry-Erase Markers by EXPO returned the following matches:

All results displayed are in the category:  
Dry-Erase Markers  
[Show results for all categories](#)

All results displayed are from the brand:  
EXPO  
[Show results for all brands](#)

Page 2 of 2

**Dry-Erase Markers**

Customer Item No.	MFR Item No.	UOM/QTY	Your Price	Qty	Add to....
<b>Hide Images</b>					
	Sanford Expo® Markers with Built-In Eraser and Grip, Chisel Tip, 12-Color Pack Staples Item No. 600636				
600636	SAN83788	ST/12	\$13.95	1	<a href="#">Add to Order</a> <a href="#">Add to List</a>
	Sanford Expo® Dry-Erase Marker Set and Eraser Organizer Staples Item No. 500710				
500710	SAN			1	<a href="#">Add to Order</a>

MARKET BASKET

Now you can click on the link of the specific item type you would like to order. This might give you a more defined breakdown of the types of items under the category you chose. Once you find the category of items you wish to purchase you will get to a panel that will show you several pieces of information for each item available to order. The information provided is:

Picture of the item with its description

Product Code (Item number)

Unit of Measure item can be purchased

Price of the item

Delivery Date

If the item is a market basket item (MARKET BASKET hi-lighted in blue)

**QA Testing**

Office Supplies> Pens, Pencils & Correction> Dry-Erase Markers> Expo® Dry-Erase Marker Set and Eraser Organizer by Sanford

EXPO  
Sanford Expo® Dry-Erase Marker Set and Eraser Organizer

- Mounts easily to any smooth surface with double-stick tape (included)
- Includes six Expo® chisel-tip markers (black, red, blue, green, orange, and brown) and one Expo® eraser

Staples Item No.	Customer's Item No.	MFR No.	Unit	Your Price	Qty.	Add to...
500710	500710	SAN83056	KT/1	\$6.56	1	<a href="#">Add to Order</a> <a href="#">Add to List</a> <a href="#">Delivery Date</a>

**MARKET BASKET**

When you've found the item or items you wish to buy in a category, enter the quantity needed in the Quantity field, and click on the Add to Order button to add the item or items to your shopping cart. Do this for EACH additional item you wish to purchase.

**QA Testing**

Office Supplies > Pens, Pencils & Correction > Dry-Erase Markers > Expo@ Dry-Erase Marker Set and Eraser Organizer by Sanford

**EXPO**  
**Sanford Expo@ Dry-Erase Marker Set and Eraser Organizer**

View Printable Version



- Mounts easily to any smooth surface with double-stick tape (included)
- Includes six Expo@ chisel-tip markers (black, red, blue, green, orange, and brown) and one Expo@ eraser

Back

Staples Item No.	Customer's Item No.	MFR No.	Unit	Your Price	Qty.	Add to...
500710	500710	SAN83056	KT/1	\$6.56	<input type="text" value="1"/>	<a href="#">Add to Order</a> <a href="#">Add to List</a> <a href="#">Delivery Date</a>

MARKET BASKET

The Cart Subtotal gives you the total number of items and the cart subtotal for the purchase.

The screenshot shows a web browser window titled "Create Requisition - Microsoft Internet Explorer". The address bar shows a URL from "http://devfin.gmis.in.gov". The page content includes a "QA Testing" header, a "STAPLES Link.com" logo, and a "Staples Vendor # 22724" section. A navigation menu includes "Home", "Office Supplies", "Technology", "Furniture", and "Featured Items". A search bar is present with "Ink & Toner Finder" and "Search" buttons. The main content area displays "EXPO Sanford Expo® Dry-Erase Marker Set and Eraser Organizer by Sanford" with a product image and a list of features. A "View Printable Version" link is also visible. On the right side, a "View Order" and "Submit" box shows "Items: 1" and "Subtotal: \$19.68". A white arrow points to the "View Order" link. Below this box is a "Qty Item" table with one row: "3 Sanford Expo®".

Qty	Item
3	Sanford Expo®

Click the Gray View Order link at the top of the Cart Subtotal to bring up the following screen.

QA Testing

QPA# 10516

Home Office Supplies Technology Furniture Featured Items

Search Ink & Toner Finder

Resource Center StaplesLink Training Tour Order Management Customer Service

Your Order: Review Item Information [View Printable Version](#)

- Click on the column headings to sort item information.
- You can also save this order as a list.
- To continue placing your order, click **'Submit'**.

Customer's Item No.	MFR Item No.	UOM/Qty	Your Price	Qty.	Item Total	Expected Delivery Date	
Sanford Expo® Dry-Erase Marker Set and Eraser Organizer Staples Item No. 500710							
MARKET BASKET							
500710	SAN83056	KT/1	\$6.59	<input type="text" value="3"/>	\$19.68	Delivery Date	<input type="checkbox"/>
Staples® Stainless Steel Scissors, 8", 3/Pk Staples Item No. 229690							
MARKET BASKET							
229690	STP10623CC	PK/3	\$1.20	<input type="text" value="5"/>	\$6.00	Delivery Date	<input type="checkbox"/>
Customer's Item No.	MFR Item No.	UOM/Qty	Your Price	Qty.	Item Total	Expected Delivery Date	Remove an Item
<b>Total: \$25.68</b>							
<input type="button" value="Clear Order"/> <input type="button" value="Update Order"/> <input type="button" value="Submit"/>							

Items may be removed by selecting them and then clicking Update Order.

To change quantities, simply highlight the quantity to change and type in the correct quantity. Then click Update Order to save the change(s).

Any changes to your order should be made at this screen before clicking Submit.

You can remove items from your order by selecting the item and then clicking the Update Order button.

You can change the quantity ordered of any item by highlighting the item quantity and changing the item to the quantity you require and then clicking Update Order.

When you are done shopping click the Submit button. This will take you back to PeopleSoft to finish processing the requisition.

**QA Testing**

Address: [http://devfin.gmis.in.gov/psp/fsup2/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU\\_PV\\_REQ\\_ENTRY\\_GBL?PORTALPARAM\\_PTCNAV=EP\\_PV\\_REQ\\_ENTRY\\_GBL&EOPP.SCNODE=ERP&EOPP.S](http://devfin.gmis.in.gov/psp/fsup2/EMPLOYEE/ERP/c/PV_MAIN_MENU_PV_REQ_ENTRY_GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTRY_GBL&EOPP.SCNODE=ERP&EOPP.S)

Home | Worklist | Add to Favorites | Sign out

StaplesLink.com easier for QPA# 10516

Home | Office Supplies | Technology | Furniture | Featured Items

Search Ink & Toner Finder

Resource Center | StaplesLink Training Tour | Order Management | Customer Service

**Your Order: Review Item Information** [View Printable Version](#)

- Click on the column headings to sort item information.
- You can also save this order as a list.
- To continue placing your order, click **'Submit'**.

Customer's Item No.	MFR Item No.	UOM/Qty	Your Price	Qty.	Item Total	Expected Delivery Date	Remove an Item
Sanford Expo® Dry-Erase Marker Set and Eraser Organizer Staples Item No. 500710							
<b>MARKET BASKET</b>							
500710	SAN83056	KT/1	\$6.56	3	\$19.68	Delivery Date	<input type="checkbox"/>
Staples® Stainless Steel Scissors, 8", 3/Pk Staples Item No. 229690							
<b>MARKET BASKET</b>							
229690	STP10623CC	PK/3	\$1.20	5	\$6.00	Delivery Date	<input type="checkbox"/>
Customer's Item No.	MFR Item No.	UOM/Qty	Your Price	Qty.	Item Total	Expected Delivery Date	Remove an Item
<b>Total:</b>						<b>\$25.68</b>	

Continue Shopping | Clear Order | Update Order | **Submit**

Windows taskbar: start | Inbox - Microsoft Out... | PURCHASINGFROMS... | Create Requisition - ... | Windows Media Player | 10:14 AM

QA Testing

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 00061 Department of Administration

Requester: J005563 Geer, Jeania-300

Requisition Name: Staples week of 3/24/08 Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	STAPLES: Sanford Expo#174; Dry-Erase Marker Set and Eraser Organizer	STAPLES	3.0000	Kit	6.560	19.680
2	STAPLES: Staples#174; Stainless Steel Scissors, 8", 3/Pk	STAPLES	5.0000	Package	1.200	6.000

Select All / Deselect All

Add to favorites Modify Line / Shipping / Accounting Delete

Requisition Type: QPA

Justification/Comments: Office supplies for the Procurement Training Room

Send to Vendor Show at Receipt Show at Voucher

Check Budget

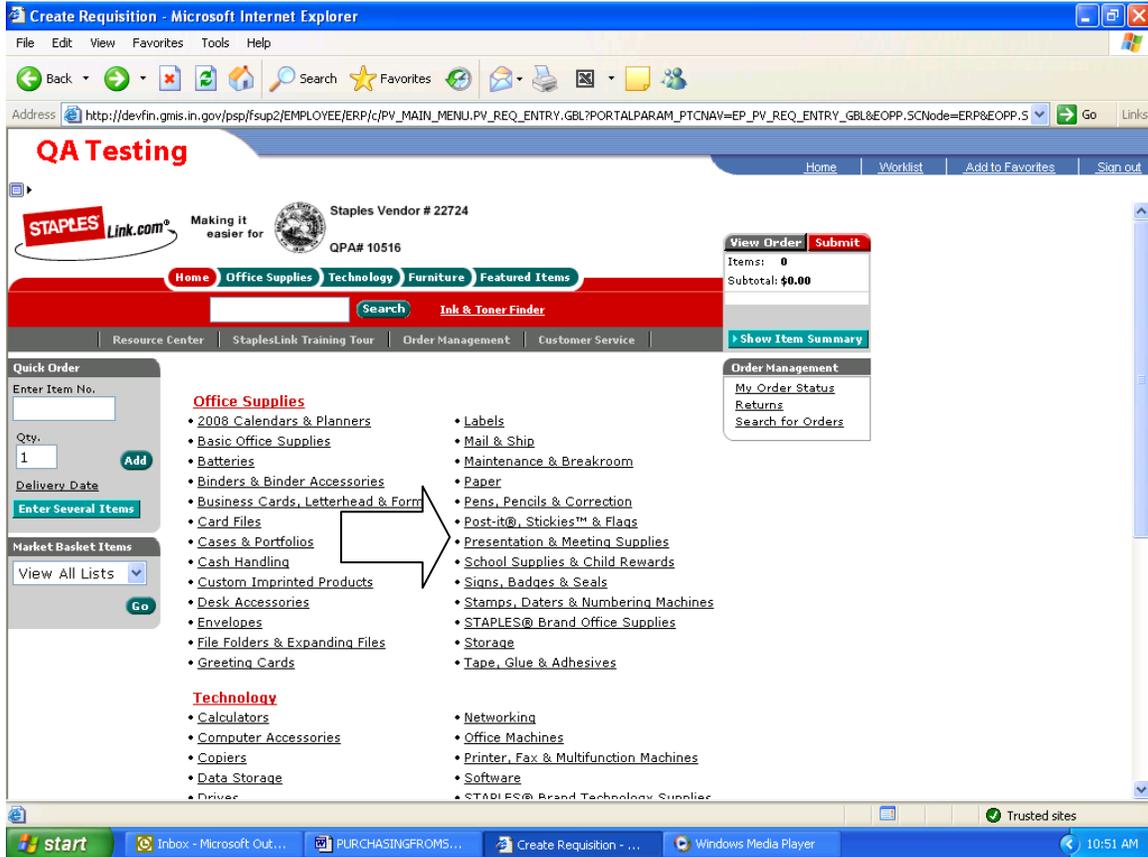
Save as Template

Save & submit Save & preview approvals Cancel requisition Find more items

If you have returned to the Requisition summary screen and you realize that you are missing item(s) you can return to the Staples catalog by clicking the Add Items and Services link again. If you do add any new items, you must edit your line default information or those new line(s) will have the information for your default settings.

# Finding Non-Market Basket items in the Staples catalog

To search for items not from the Market Basket you can search from the categories displayed on the initial screen when you punch out. This will give you both market basket items and non-market basket items for purchase. Select the link that best describes the type of item you want to purchase. This will give you a break down of what types of items are under this broad category.



Microsoft Internet Explorer - Create Requisition

Address: http://devfin.gmis.in.gov/psp/f/sup2/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?PORTALPARAM\_PTCNAV=EP\_PV\_REQ\_ENTRY\_GBL&EOPP\_SCNode=ERP&EOPP.S

# QA Testing

Staples Vendor # 22724  
QPA# 10516

View Order: **Submit**  
Items: 0  
Subtotal: \$0.00

Home Office Supplies Technology Furniture Featured Items

Search **Ink & Toner Finder**

Resource Center StaplesLink Training Tour Order Management Customer Service **Show Item Summary**

**Quick Order**

Enter Item No.

Qty.  **Add**

Delivery Date

**Enter Several Items**

---

**Market Basket Items**

View All Lists

Office Supplies

## Presentation & Meeting Supplies

**Audio/Visual Carts, Stands, & Wall Mounts**

- [Audio/Visual Carts](#)
- [Audio/Visual Stands](#)
- [Audio/Visual Wall Mounts](#)

**Binding Systems & Accessories**

- [Binding Systems](#)
- [Binding Covers](#)
- [Binding Spines](#)

**Board Accessories**

- [Magnets](#)
- [Partition Hangers](#)
- [Pushpins](#)
- [Thumbtacks](#)

**Cameras & Film**

- [Cameras](#)

**Laminating Machines & Accessories**

- [Laminating Pouches](#)

**Pointers & Projection Screens**

- [Pointers](#)
- [Projection Screens](#)

**Presentation Boards & Easels**

- [Presentation Boards](#)
- [Presentation Easels](#)
- [Easel Pads](#)

**Projectors**

- [Projectors: Digital](#)
- [Projectors: Overhead](#)
- [Projectors: Slide](#)

**Report Covers & Portfolios**

- [Clear Front Report Covers](#)

Done Trusted sites

start | Inbox - Microsoft Out... | PURCHASINGFROMS... | Create Requisition - ... | Windows Media Player | 10:53 AM

Microsoft Internet Explorer - Create Requisition

Address: http://devfin.gmis.in.gov/psp/fsup2/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?PORTALPARAM\_PTCNAV=EP\_PV\_REQ\_ENTRY\_GBL&EOPP\_SCNode=ERP&EOPP.S

## QA Testing

Home | Worklist | Add to Favorites | Sign out

**STAPLES Link.com** Making it easier for **Staples Vendor # 22724**  
QPA# 10516

View Order: **Submit**  
Items: **0**  
Subtotal: **\$0.00**

Home | Office Supplies | Technology | Furniture | Featured Items

Search **Ink & Toner Finder**

Resource Center | StaplesLink Training Tour | Order Management | Customer Service | **Show Item Summary**

**Quick Order**

Enter Item No.

Qty.  **Add**

Delivery Date

**Enter Several Items**

Market

View

Office Supplies > [Presentation & Meeting Supplies](#)

### Magnets

**Hide Images**

For product details, click any item name.



[Assorted Size and Color Magnets by OIC](#)



[Assorted Size and Color Magnets by Staples](#)



[Molded Magnetic Letters by Quartet](#)

Done Trusted sites

start | Inbox - Microsoft Out... | PURCHASINGFROMS... | Create Requisition - ... | Windows Media Player | 10:54 AM

Microsoft Internet Explorer - Create Requisition

Address: http://devfin.gmis.in.gov/psp/fsup2/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?PORTALPARAM\_PTCNAV=EP\_PV\_REQ\_ENTRY\_GBL&EOPP\_SCNode=ERP&EOPP.S

## QA Testing

Home | Worklist | Add to Favorites | Sign out

**STAPLES Link.com** Making it easier for **Staples Vendor # 22724**  
QPA# 10516

View Order: **Submit**  
Items: **0**  
Subtotal: **\$0.00**

Home | Office Supplies | Technology | Furniture | Featured Items

Search **Ink & Toner Finder**

Resource Center | StaplesLink Training Tour | Order Management | Customer Service

**Show Item Summary**

Office Supplies > Presentation & Meeting Supplies > Magnets

### Assorted Size and Color Magnets by Staples

- Great for all magnetic surfaces
- Each tub contains 12 small, 12 medium and 6 large magnets
- Assorted colors include red, yellow, green, blue and white

Quick Order

Enter Item No.

Qty.  **Add**

Delivery Date

**Enter Several Items**

Market Basket Items

View All Lists

Customer Item No.	Mfg's Item No.	UOM/Qty	Your Price	Qty	Add to...
	382835	STP10673 PK/30	\$3.80	<input type="text" value="1"/>	<b>Add to Order</b> <b>Add to List</b> Delivery Date

start | Inbox - Microsoft Out... | PURCHASINGFROMS... | Create Requisition - ... | Windows Media Player | 10:54 AM

## Review and Submit

At the Review and Submit screen you are able to complete several tasks on the requisition including final submission to the approval workflow.

These tasks include:

9. Adding Line Comments
10. Modify Line/Shipping/Accounting information
11. Choose Requisition Type
12. Add justification comments for requisition
13. Check requisition budget
14. Add more items to requisition
15. Cancel requisition
16. Save & preview approvals
17. Save & Submit requisition to workflow

The screenshot shows the 'Create Requisition' web application interface. The browser window title is 'Create Requisition - Microsoft Internet Explorer'. The page header includes 'QA Testing' and navigation links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The main content area displays requisition details:

- Business Unit:** 00061 Department of Administration
- Requester:** J005563 Geer, Jeania-300
- Requisition Name:** Staples week of 3/24/08
- Priority:** Medium

The 'Requisition Lines' table is shown below:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	STAPLES: Sanford Expo#174: Dry-Erase Marker Set and Eraser Organizer	STAPLES	3.0000	Kit	6.560	19.680
2	STAPLES: Staples#174: Stainless Steel Scissors, 8", 3/Pk	STAPLES	5.0000	Package	1.200	6.000
3	STAPLES: Staples#174: Assorted Size and Color Magnets, 30/Pk	STAPLES	1.0000	Package	3.800	3.800

Below the table are buttons for 'Select All / Deselect All', 'Add to favorites', 'Modify Line / Shipping / Accounting', and 'Delete'. The 'Requisition Type' is set to 'QPA'. The 'Justification/Comments' section contains two items:

- Item #3 is non market basket
- These magnets are needed to hang posters in the training room.

There are checkboxes for 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher'. At the bottom, there are buttons for 'Check Budget', 'Save as Template', 'Save & submit', 'Save & preview approvals', 'Cancel requisition', and 'Find more items'.

Numbered callouts (9-17) are placed over the interface to highlight specific features: 9 points to the 'Add to favorites' button; 10 points to the 'Modify Line / Shipping / Accounting' button; 11 points to the 'Requisition Type' dropdown; 12 points to the 'Justification/Comments' text area; 13 points to the 'Check Budget' button; 14 points to the 'Find more items' link; 15 points to the 'Cancel requisition' button; 16 points to the 'Save & preview approvals' button; and 17 points to the 'Save & submit' button.

## 9. Adding Line Comments

To add line comments, click on the Comments icon (cloud) to open the Line Comments screen. If the comments are to be printed on the requisition, RFQ or Purchase order, please make sure the **Send to Vendor** box is checked.

**Line Comments**

Line	Description	Quantity	Unit	
1	Test item for training guide	1.0000	Each	USD

<- Test for additional information to see where prints >

Send to Vendor    Show at Receipt    Show at Voucher

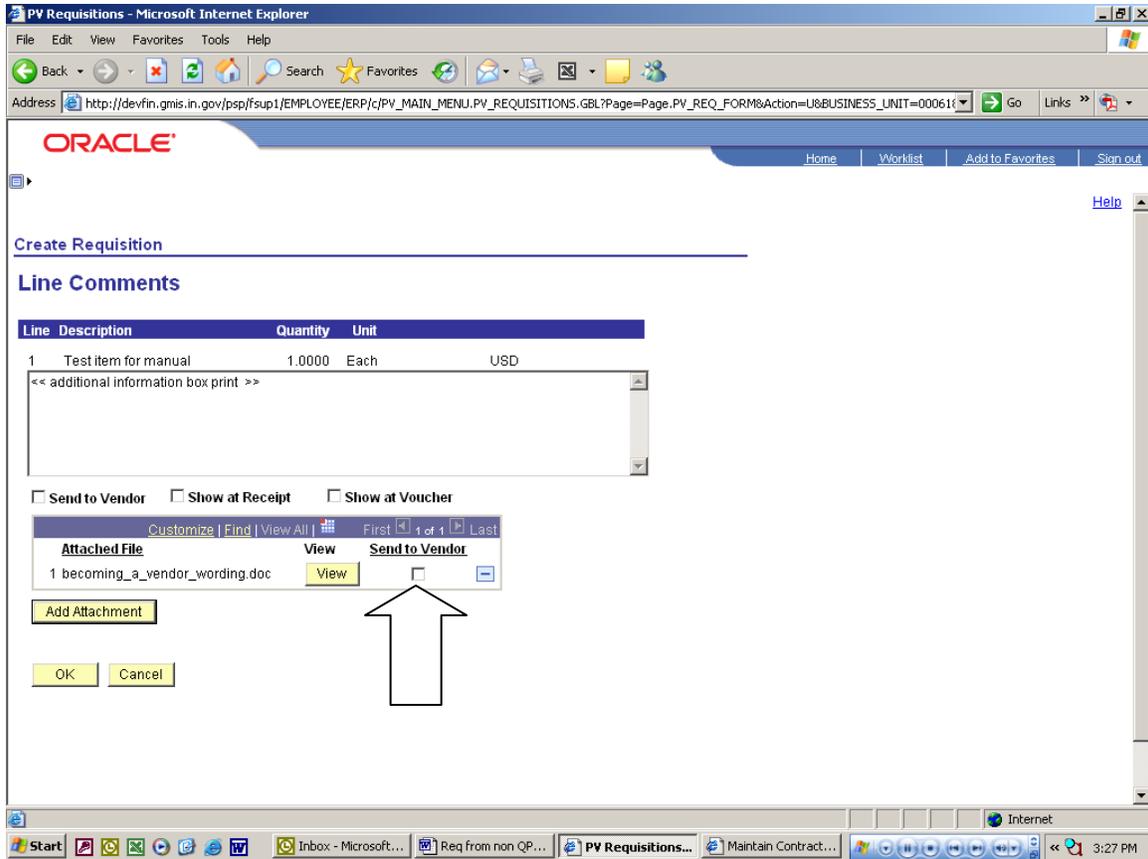
 

### If you need to add attachments to the requisition

Click on the Add Attachment button and you will see the screen below that will allow you to search your computer for the attachment. Click the browse button (this will bring up your Windows menu) to search for the file you want to add as an attachment. Highlight the document name and click open, this will transfer the document to the browse line. Once the file is listed in the browse line, click the Upload button to add the attachment to the requisition.

**Add Attachment**

Once you have uploaded the file you will be returned to this screen. This screen shows you the file as an attachment to the requisition. If you are done and do not want the attachment sent to the vendor or added to the RFQ or Purchase Order, you do not need to check the Send to Vendor box for the attachment. If you are done with adding attachments and line comments, click the OK button to continue and be taken back to the Review and Submit screen.



## 10. Modify Line/Shipping/Accounting information

Always, you must re-enter the shipping and accounting information (Chartfield) for each line of the requisition. You must select each line to be modified before clicking this link. To copy the Chartfields from step 1 of the process, click the Load Values From Defaults and all Chartfields will be populated from Define Requisition screen.

**This is where you can add multiple distribution lines for a requisition line.**

**ORACLE**

Home | Worklist | Add to Favorites | Sign out

Help

### Create Requisition

#### Modify Line / Shipping / Accounting

**Line Information**

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID:  Vendor Location:   
Buyer:  Category:

**Shipping Information**

Ship To:  [Modify Shipping Address](#)  
Due Date:  Attention:

**Accounting Information**

Chartfields1 | Details | Asset Information

Percent	GL Unit	Entry Event	Fund	Object	Center	Dept	Bud Ref	Project	Class	Alt Acct	Oper Unit	Product
1	00061											

[Load Values From Defaults](#)

Apply Cancel

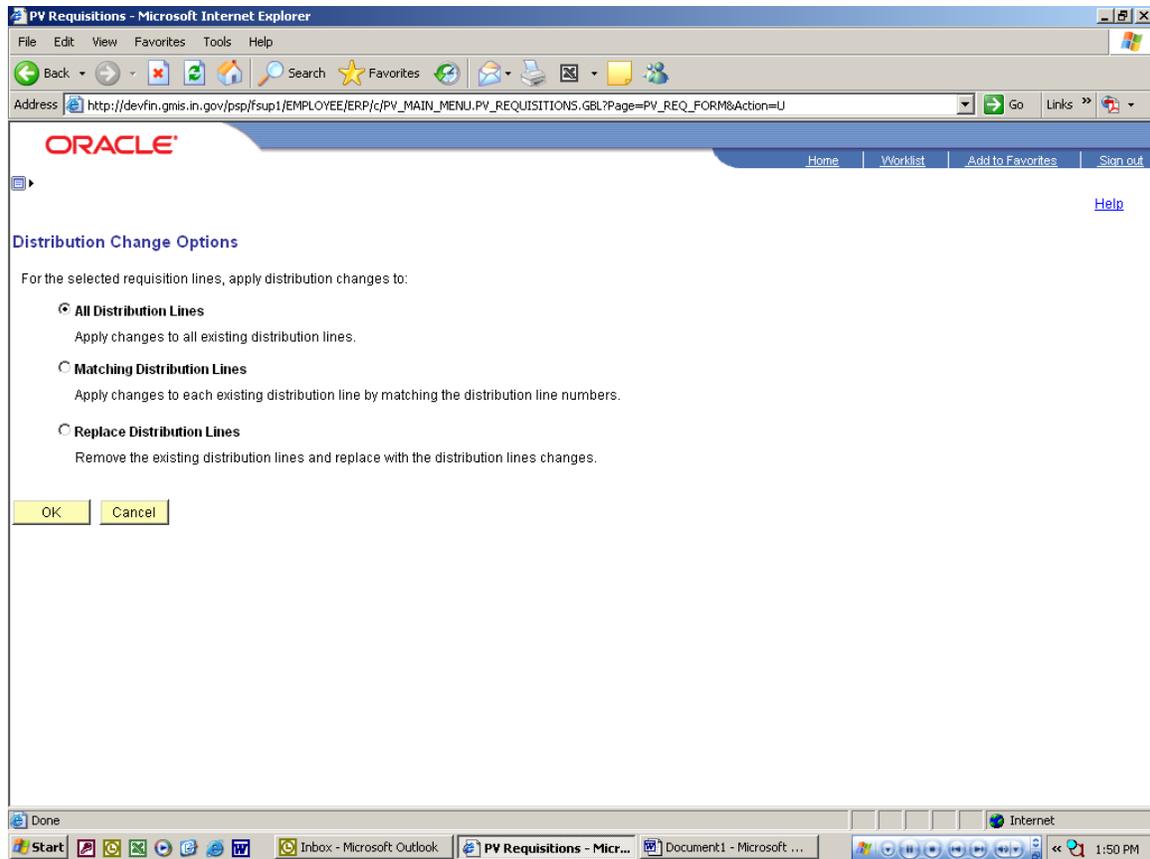
Done, but with errors on page.

Start | Inbox - Microsoft Outlook | PV Requisitions - Micr... | Document1 - Microsoft ... | 1:47 PM

Once you have made all corrections or modifications to the Chartfield information and Click Apply, you will be taken to the following screen.

At this screen you have three (3) options to choose: 1) to have the changes affect all requisition lines select All Distribution Lines 2) to have the changes affect only the requisition lines chosen before making the changes select Matching Distribution Lines 3) if you have made multiple changes to the Chartfields and want to replace the old information with the new, select Replace Distribution Lines.

Click OK and you will be returned to the Review and Submit screen and all changes will be applied to the lines as you have noted.



### 11. Choose Requisition Type

Click the drop down arrow to select the type of requisition this is - QPA. This is a required field.

### 12. Add justification comments for requisition

Click inside the justification box and enter all justification information for this requisition. This could include but is not limited to why using out of state vendor, purchasing outside current QPA, why this item is needed. This information can be added to the RFQ and Purchase Order if needed by checking the Send to Vendor box, otherwise this justification is only placed on the requisition. This is a required field.

**NOTE:** Any order that has non-market basket items included will be routed for IDOA approval once the requisition is saved and submitted. **In PeopleSoft, non-market basket items will be marked with an asterisk (\*) in front of the item description. If your requisition contains any non-market basket item(s) you must have the following information contained in your justification or the requisition will not be approved by IDOA.**

1. Identify what line item(s) are NON-market basket.
2. Detail why this specific product is needed.
3. What research was done to determine that this product is not available or similar to a product through the market basket items?
4. If there is a similar product in the market basket, please detail what sets the product aside from the market basket item(s)? similar? (What does this product offer that other products don't?)

There is an icon to the right of the box (two sheets with a diagonal arrow) that will bring up a larger box to type in your justification. When finished typing, click OK and it will take you back to the Review and Submit screen.

### 13. Check requisition budget

Clicking the Check Budget button will budget check your requisition and pre-encumber the funds. This step is not necessary to save and submit the requisition to workflow, please check with your agency as to when this step should be done. **Budget checking can be completed at the Manage Requisition screen at a later time.**

### 14. Find more items link

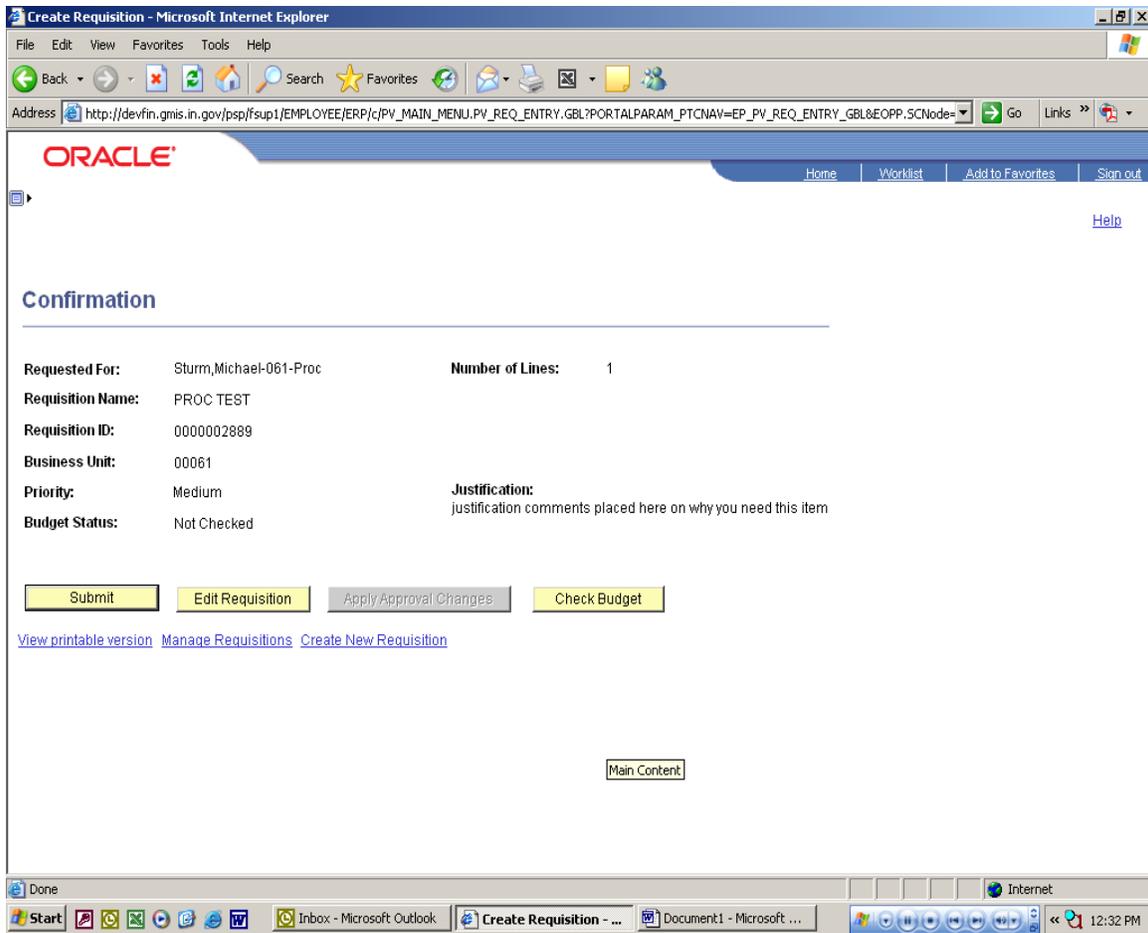
This link takes you directly back to the Add Items and Services step of the requisition, so additional item or services can be added.

### 15. Cancel requisition

Clicking the Cancel requisition button before saving or submitting will remove the information about the requisition being created from the system. If you have saved the requisition, you will only cancel the changes to the requisition if there are any. To cancel the requisition after it has been saved, you must go to the Manage Requisition screen.

### 16. Save & preview approvals

Clicking the Save & preview approvals button will take you to the screen shown below. This allows you to save without submitting the requisition to the approval workflow and review a summary of the requisition. This screen provides your requisition number (for later use), requisition name, justification and if the requisition has been budget checked.



## 17. Save and Submit requisition to workflow

Clicking the Save & Submit button will place the requisition into your agency's approval workflow. You will be taken to a similar screen as shown in the prior section. At this point you have the option to edit the requisition and budget check if you did not do this step prior to saving and submitting. You can access the Manage Requisitions screen to review the requisition and its status by clicking on the Manage Requisition link.

# Manage Requisition

Once the requisition has been saved and submitted to the workflow process you will need to navigate to the Manage Requisition screen to budget check (if not completed prior) and to see if the requisition has been approved and is ready for further processing.

*Menu Navigation:*

- eProcurement
  - Manage Requisitions

When the Manage Requisitions screen opens, locate your requisition by searching or sorting the list as needed. You can search by several pieces of information.

The information you can search by are:

- 18. Business Unit
- 19. Requisition Name
- 20. Requisition ID
- 21. Date range
- 22. Requestor
- 23. PO ID

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

**Business Unit:** 00800 **Requisition Name:**

**Requisition ID:**  **Request Status:** All but Complete **Budget Status:**

**Date From:** 02/01/2007 **Date To:** 02/22/2007

**Requester:**  **Entered By:**  **PO ID:**

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition ID / Name	BU	Date	Status	Budget	Total
0000000003	0000000003	00800	02/07/2007	Approved	Valid	1.89USD
0000000002	0000000002	00800	02/01/2007	Open	Not Chk'd	10.00USD
0000000001	0000000001	00800	02/01/2007	Open	Not Chk'd	10.00USD

[Create New Requisition](#) [Inquire Change Request](#) [Inquire Receipts](#) [Requisition Report](#)

The Manage Requisitions screen gives several pieces of information on the requisition and also allows the user to access other screens that will allow other functions. The information provided on this screen is:

- 24. Req ID
- 25. Requisition ID/Name
- 26. BU (Business unit)
- 27. Date
- 28. Status
- 29. Budget
- 30. Total
- 31. Requisition report
- 32. Additional actions that can be completed on requisition

Clicking on the blue names for fields 24 to 30 will resort the columns.

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 00800    Requisition Name:

Requisition ID:     Request Status: All but Complete    Budget Status:

Date From: 02/01/2007    Date To: 02/22/2007

Requester:     Entered By:     PO ID:

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Actions dropdown menu and click Go.

Req ID	Requisition ID / Name	BU	Date	Status	Budget	Total	
0000000003	0000000003	00800	02/07/2007	Approved	Valid	1.89 USD	<Select Action...> Go
0000000002	0000000002	00800	02/01/2007	Open	Not Chk'd	10.00 USD	<Select Action...> Go
0000000001	0000000001	00800	02/01/2007	Open	Not Chk'd	10.00 USD	<Select Action...> Go

[Create New Requisition](#)   [Inquire Change Request](#)   [Inquire Receipts](#)   [Requisition Report](#)

Main Content

## 24. Req ID

This is the requisition number assigned by PeopleSoft. Clicking the requisition number allows the user to see the following screen of requisition details. When done reviewing the requisition details just click the Return to Manage Requisitions link to be taken back to the Manage Requisition screen.

The screenshot shows a web browser window titled "Manage Requisitions - Microsoft Internet Explorer". The address bar contains the URL: [http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_STATUS.GBL?FolderPath=PORTAL\\_ROOT\\_OBJECT.EPCO\\_EPROCUREMENT.EP\\_J](http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_STATUS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT.EP_J). The page header features the Oracle logo and navigation links: Home, Worklist, Add to Favorites, Sign out, New Window, Help, and Customize Page. The main content area is titled "Requisition Details" and contains a table with the following data:

Requisition Name	Requisition ID	Unit	Date	Status	Total
michael qpa budget check cance	00000002893	00061	02/22/2007	Approved	44.00

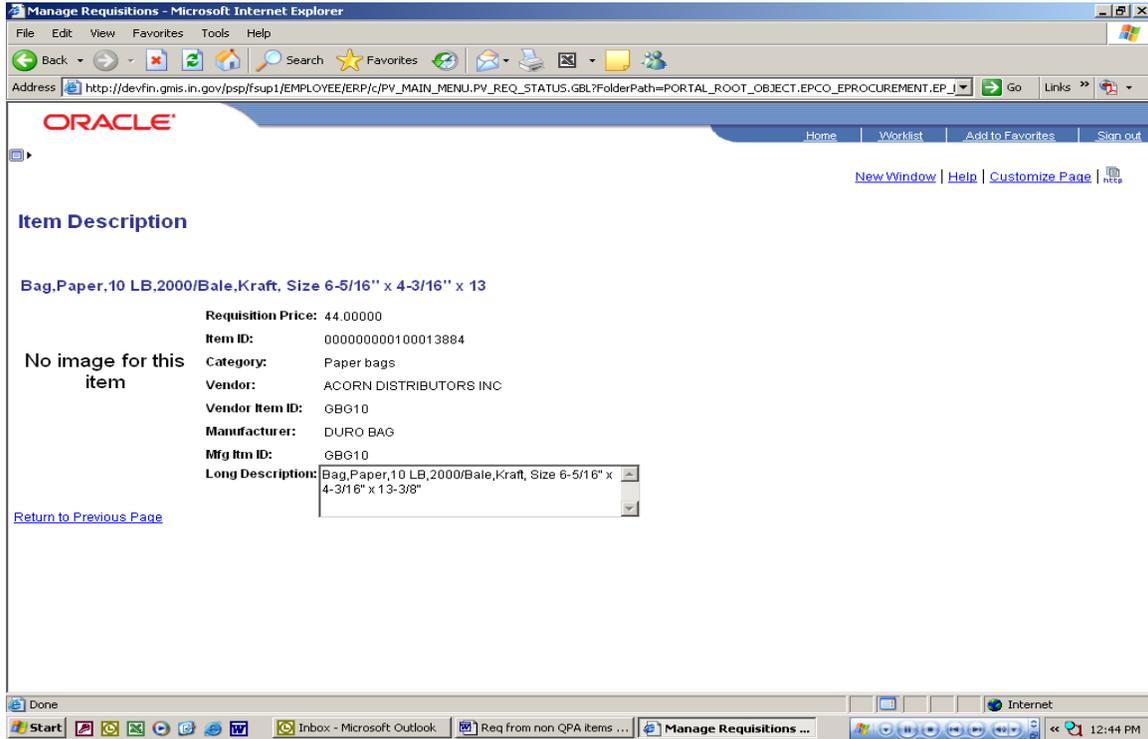
Below the table, there is a section for "Justification / Comments:" with the text "test".

Line	Item Description	Source Status	Qty	Price	Total
1	<a href="#">Bag,Paper,10 LB,2000/Bale,Kr...</a>	Available	1.0000	Case 44,000 USD	44.000

At the bottom of the page, there are two blue links: [Return to Manage Requisitions](#) and [Requisition Schedule and Distribution](#). The browser's taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 12:38 PM.

From the requisition details screen you can also view details about the line items and the schedule and distribution for the requisition lines. To review the detailed information click the blue link to review. The following screens show more detail as to what will be seen.

## Item Description Screen



**Item Description**

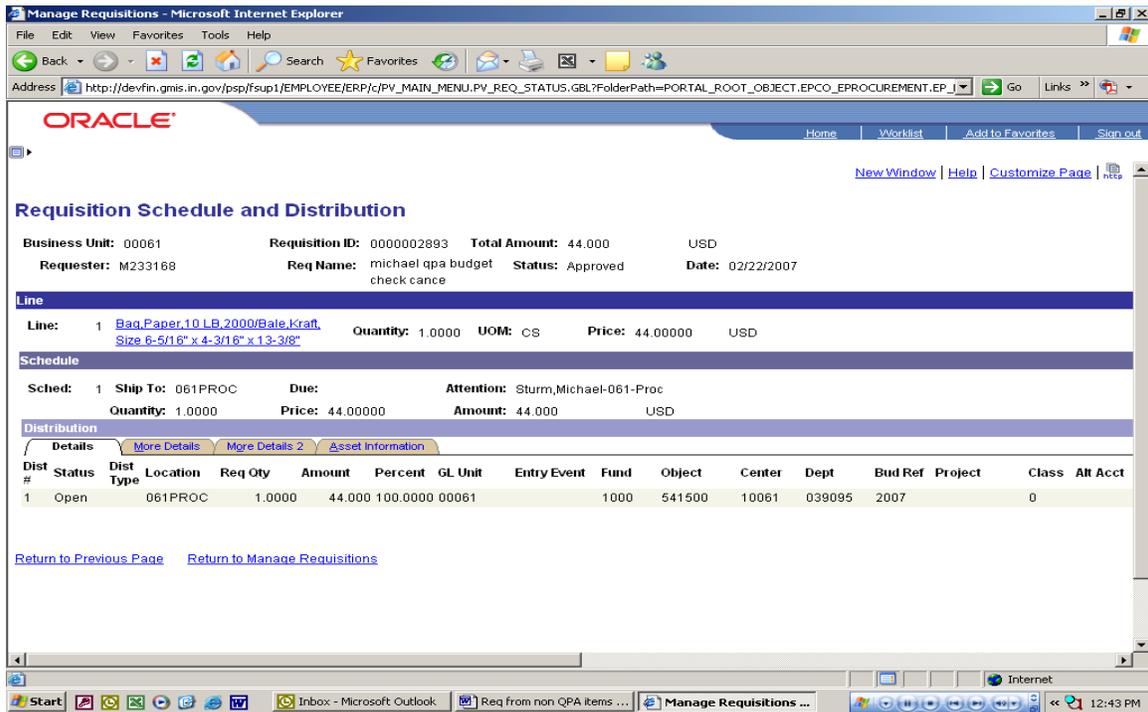
Bag, Paper, 10 LB, 2000/Bale, Kraft, Size 6-5/16" x 4-3/16" x 13

No image for this item

**Requisition Price:** 44.00000  
**Item ID:** 00000000100013884  
**Category:** Paper bags  
**Vendor:** ACORN DISTRIBUTORS INC  
**Vendor Item ID:** GBG10  
**Manufacturer:** DURO BAG  
**Mfg Itm ID:** GBG10  
**Long Description:** Bag, Paper, 10 LB, 2000/Bale, Kraft, Size 6-5/16" x 4-3/16" x 13-3/8"

[Return to Previous Page](#)

## Requisition Schedule and Distribution Screen



**Requisition Schedule and Distribution**

**Business Unit:** 00061      **Requisition ID:** 0000002893      **Total Amount:** 44,000      USD  
**Requester:** M233168      **Req Name:** michael opa budget check cancel      **Status:** Approved      **Date:** 02/22/2007

Line	Line	Item Description	Quantity	UOM	Price	USD
1	1	Bag, Paper, 10 LB, 2000/Bale, Kraft, Size 6-5/16" x 4-3/16" x 13-3/8"	1.0000	CS	44.00000	USD

**Schedule**

**Sched:** 1      **Ship To:** 061PROC      **Due:**      **Attention:** Sturm, Michael-061-Proc  
**Quantity:** 1.0000      **Price:** 44.00000      **Amount:** 44.000      USD

**Distribution**

[Details](#)    [More Details](#)    [Mgre Details 2](#)    [Asset Information](#)

Dist #	Status	Dist Type	Location	Req Qty	Amount	Percent	GL Unit	Entry Event	Fund	Object	Center	Dept	Bud Ref	Project	Class	Alt Acct
1	Open		061PROC	1.0000	44.0000	100.0000	00061		1000	541500	10061	039095	2007		0	

[Return to Previous Page](#)    [Return to Manage Requisitions](#)

**25. Requisition ID/ Name**

This column lists the name of the requisition provided by the requestor or the Req ID number if the requisition was not named during creation.

**26. BU (business unit)**

This column lists the business unit number of the agency that the requisition belongs to.

**27. Date**

This is the date the requisition was created and saved.

**28. Status**

This column shows the status of the requisition. Statuses of Approved, Open, Cancelled, Pending, PO(s) Created, PO Dispatched, Partially Received and Received can be seen. In order to finish processing a requisition to a Purchase Order, the Status must be Approved

**29. Budget**

This column shows the budget status of the requisition. Statuses of Valid, Error or Not Chk'd will be seen. In order to finish processing a requisition to a Purchase Order the budget must be in Valid status.

**30. Total**

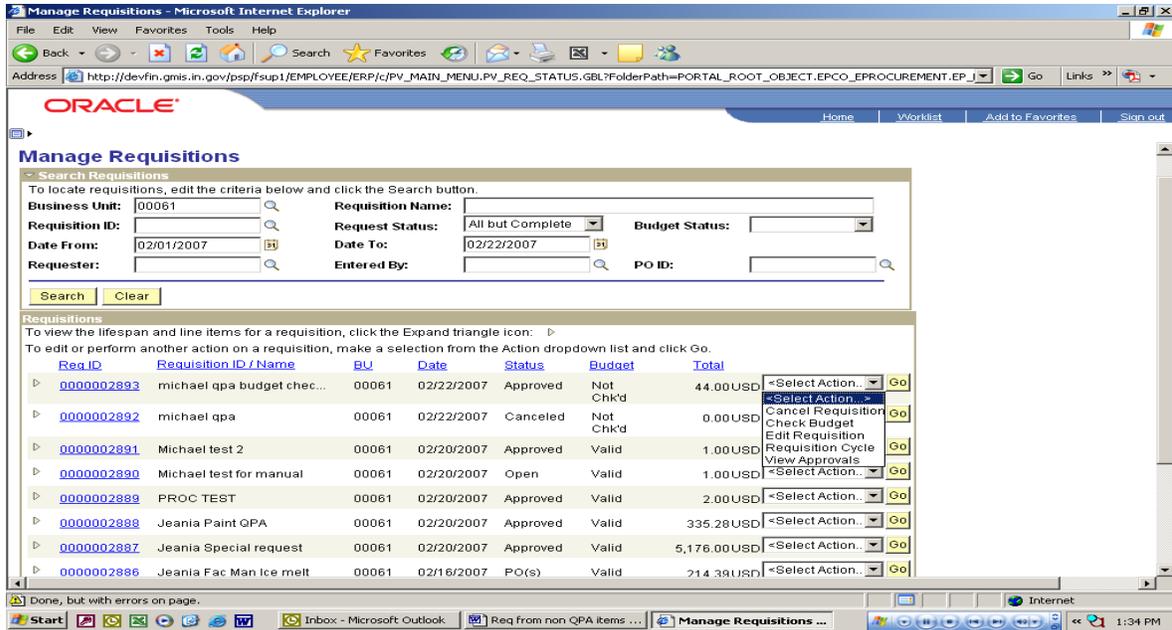
This column shows the total dollar amount for the requisition. This generally is an estimate of the final purchase amount unless it is a requisition created from items found in the search catalog.

**31. Requisition Report**

This link enables the user to create a PDF of the requisition for printing and to obtain signatures on the requisition as required. See Printing a requisition for detailed instructions on the creation process.

### 32. Additional actions that can be completed on requisition

This drop down list allows the user to see several different options that can be done to the requisition. These options include canceling the requisition, budget checking, editing the requisition, reviewing the requisition cycle and viewing the approvals for the requisition.



### Requisition Cycle

The user can access and review from the Manage Requisition screen where in the life cycle of a requisition the current requisition is. Click on the yellow triangle to the left of the Requisition ID number. The Requisition Cycle screen is shown below.

Manage Requisitions - Microsoft Internet Explorer

Address: http://devfin.gmis.in.gov/pspf/sup2/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_STATUS.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.EPCO\_EPROCUREMENT.EP\_PV\_REQ\_STA1

## QA Testing

Home | Worklist | Add to Favorites | Sign out

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition ID / Name	BU	Date	Status	Budget	Total	
0000003412	0000003412	00061	03/10/2008	Open	Not Chk'd	6.50 USD	<Select Action...> Go
0000003411	Office Supplies #4	00061	03/07/2008	PO(s) Dispatched	Valid	8.17 USD	<Select Action...> Go
0000003410	Office Supplies Test 4	00061	03/07/2008	PO(s) Dispatched	Valid	6.98 USD	<Select Action...> Go

**Requester:** Wilson, Myra-061-Proc **Entered By:** Wilson, Myra-061-Proc **Priority:** Medium

**Request Lifespan:**

**Line Information**

Line	Description	Status	Price	Curr	Qty	UOM	Vendor
1	STAPLES: Staples#174, Ballp...	PO Dispatched	0.580	USD	10.0000	DZN	STAPLES
2	STAPLES: Staples#174, Ballp...	PO Dispatched	0.590	USD	2.0000	DZN	STAPLES

0000003409	Office Supplies Test 3	00061	03/07/2008	PO(s) Dispatched	Valid	24.95 USD	<Select Action...> Go
0000003408	Office Supplies Test 2	00061	03/07/2008	PO(s) Dispatched	Valid	4.15 USD	<Select Action...> Go
0000003407	0000003407	00061	03/07/2008	PO(s)	Valid	31.08 USD	<Select Action...> Go

Done | Trusted sites | 11:55 AM

## View Approvals

This action allows the user to review a more detailed summary of the approval status of a requisition, including the Chartfields and Ship to information for individual lines of the requisition.

The screenshot displays the Oracle Manage Requisitions web application in a Microsoft Internet Explorer browser window. The browser's address bar shows the URL: [http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_STATUS.GBL?FolderPath=PORTAL\\_ROOT\\_OBJECT.EPCO\\_EPROCUREMENT.EP\\_1](http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_STATUS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT.EP_1). The Oracle logo is visible at the top left of the page. The main content area is titled "Approval Status" and contains the following information:

**Req Name:** 0000000003  
**Total:** 1.89 USD

**Requester:** [Clingan, Sharon-Ciber-GMIS](#)      **Business Unit:** 00800  
**Entered on:** 02/07/2007      **Requisition ID:** 0000000003  
**Status:** Approved      **Priority:** Medium  
**Requester's Justification:** WE NEED MORE PAPER

Below this information is a section titled "Line Information" containing a table with the following data:

Line	Item Description	Vendor Name	Qty	UOM	Price	Curr.
1	Masking Supplies Paint Mas...	PORTERPAIN-001	1.0000	EA	1.890	USD

Below the table are two buttons: "Select All / Deselect All" and "View Line Details".

At the bottom of the page, there is a section titled "Review/Edit Approvers" and a link: [Return to Manage Requisitions](#).

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 1:37 PM.

## Line Detail Screen

**Requisition: 0000000003**

Requester: Clingan, Sharon-Ciber-GMIS      Business Unit: 00800      Requisition ID: 0000000003      Date: 2/7/2007

Comments: WE NEED MORE PAPER

Line	Description	Qty	Price	Curr	UOM	Total
1	Masking Supplies Paint Masking Paper 683160 3 3/4*75' EASY MASK 12 Per Case	1	1.885	USD	EA	1.89

Sched Line	Ship To	Attention	Due Date	Qty	Total
1	Transportation, North Vernon U	Clingan, Sharon-Ciber-GMIS		1	1.89

Line	Location	Req Qty	Amount	Pct	GL Unit	Account	Bud Ref
1	800IDOT100	1	1.89	100	00800	542400	2007

## Budget Check

Selecting this action and clicking GO the system will run the budget check process and automatically refresh the page after completion. Under the column titled Budget if the requisition passes budget check it will change from Not Chk'd to Valid. If there is a problem with the Chartfields or not enough money in the associated Chartfields combination, the column will change to Error.

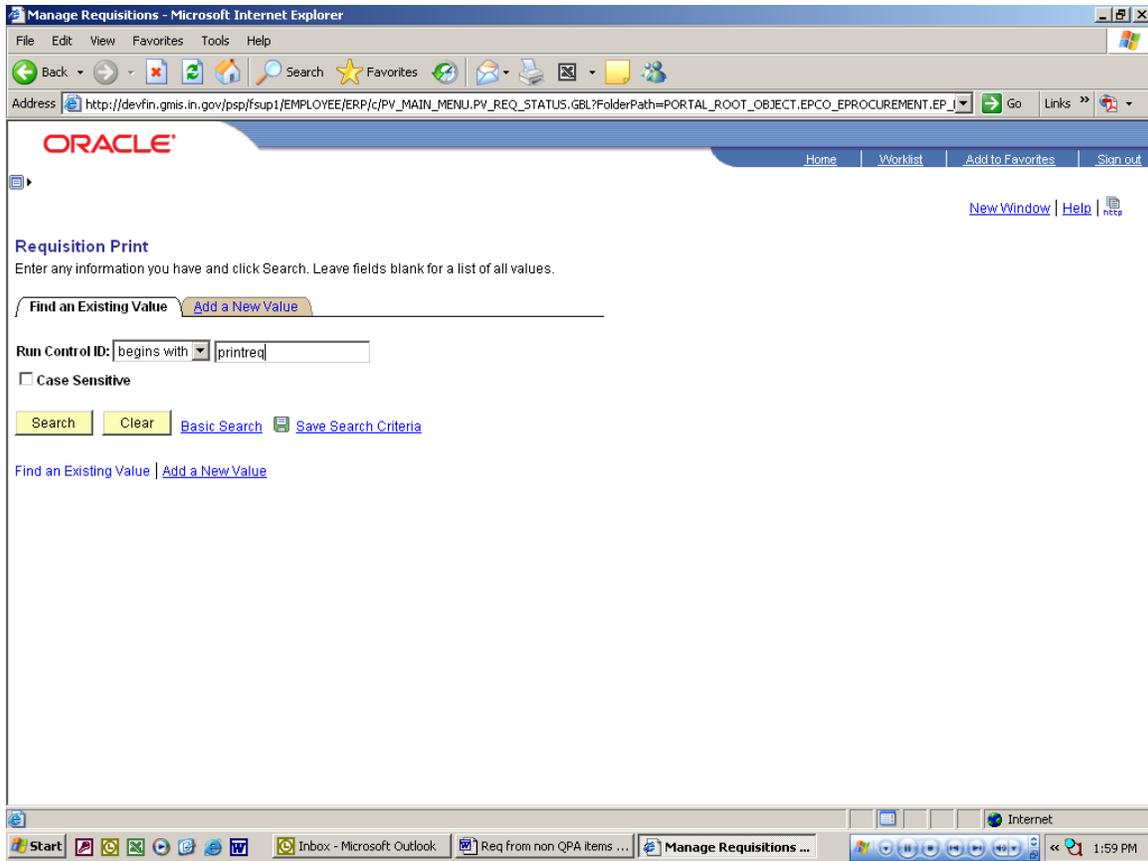
**NOTE: A requisition must be in Approved Status and have a valid Budget Check before it can be used in either the RFQ or Purchase Order processes.**

## Printing a Requisition

To print a requisition you must be in the Manage Requisitions screen. Click the link titled Requisition Report. The following screen will be the first screen for the printing process. At this screen you will be creating or searching for the Run Control for printing a requisition.

If this is the first time that you are entering the Run Control ID, then click on the Add a New Value tab. In the Run Control ID field type in PRINTREQ as the control name. Click on the Add button to create the Run Control.

**After adding the Run Control ID name the first time, use the Find and Existing Value tab and search for the run control name PRINTREQ to start the printing process.**

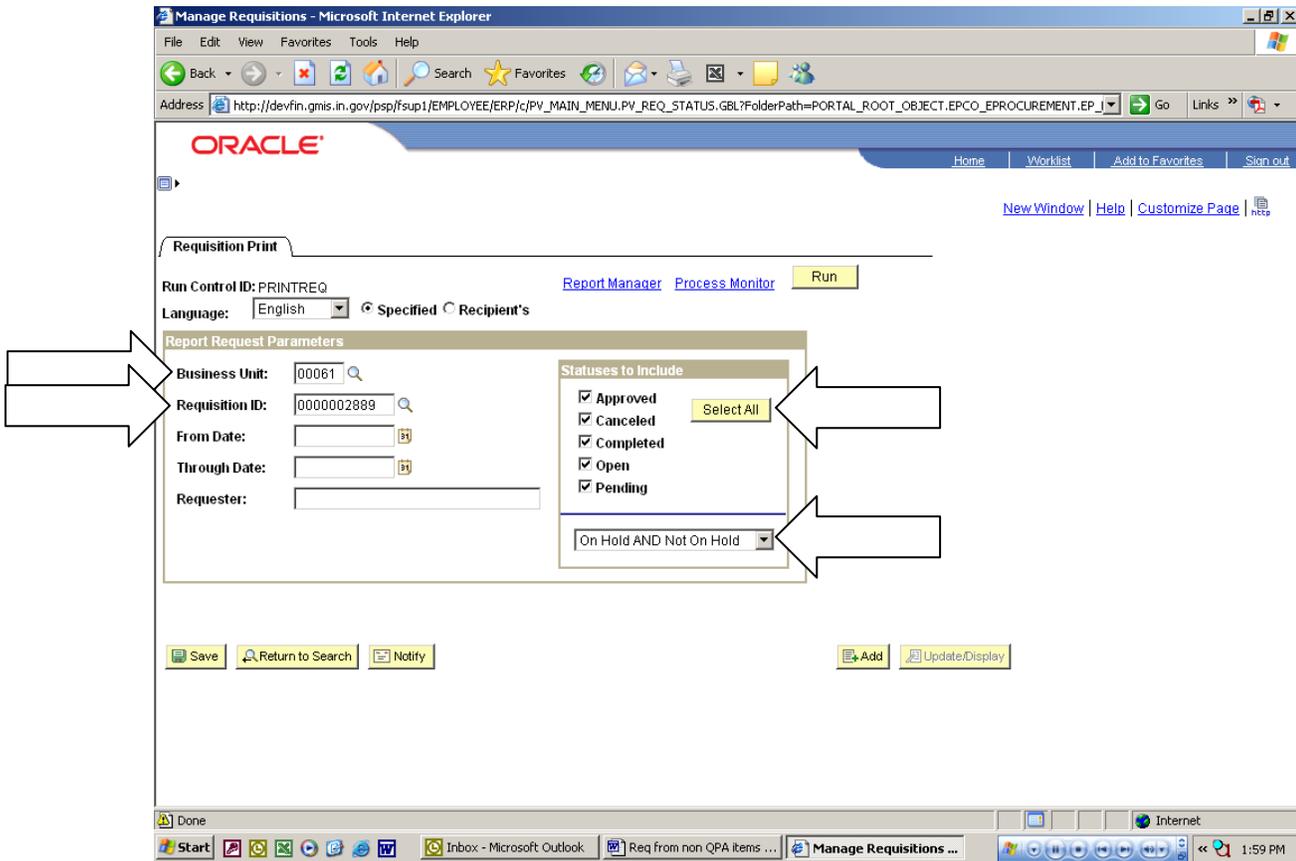


After creating or searching for an existing Run Control ID you will be taken to the following screen. At this screen you will enter your search criteria to find the requisition of which to create a PDF.

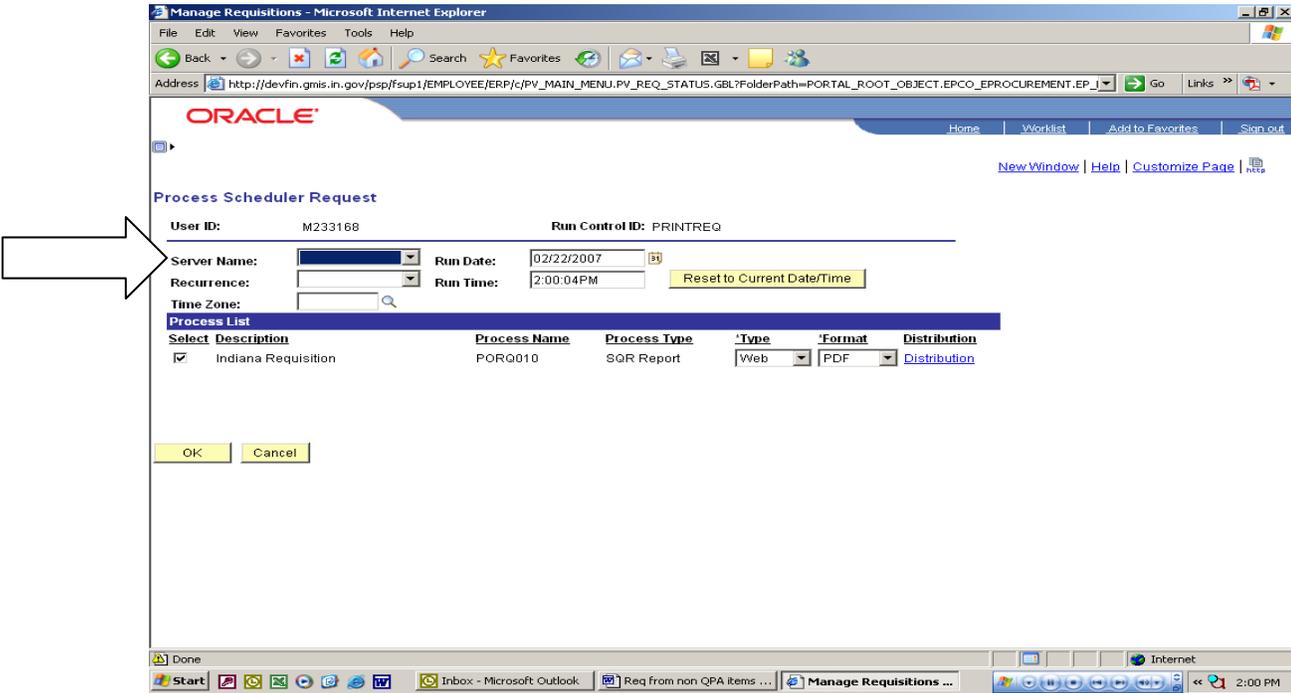
On this screen you will need to enter the five digit Business Unit number and the ten digit Requisition ID in the corresponding boxes.

You will also need to make sure that in the Statuses to Include that you click the select all button or check all five statuses. In the drop down box under the statuses you **must** make sure the box has On Hold and Not On Hold as the choice.

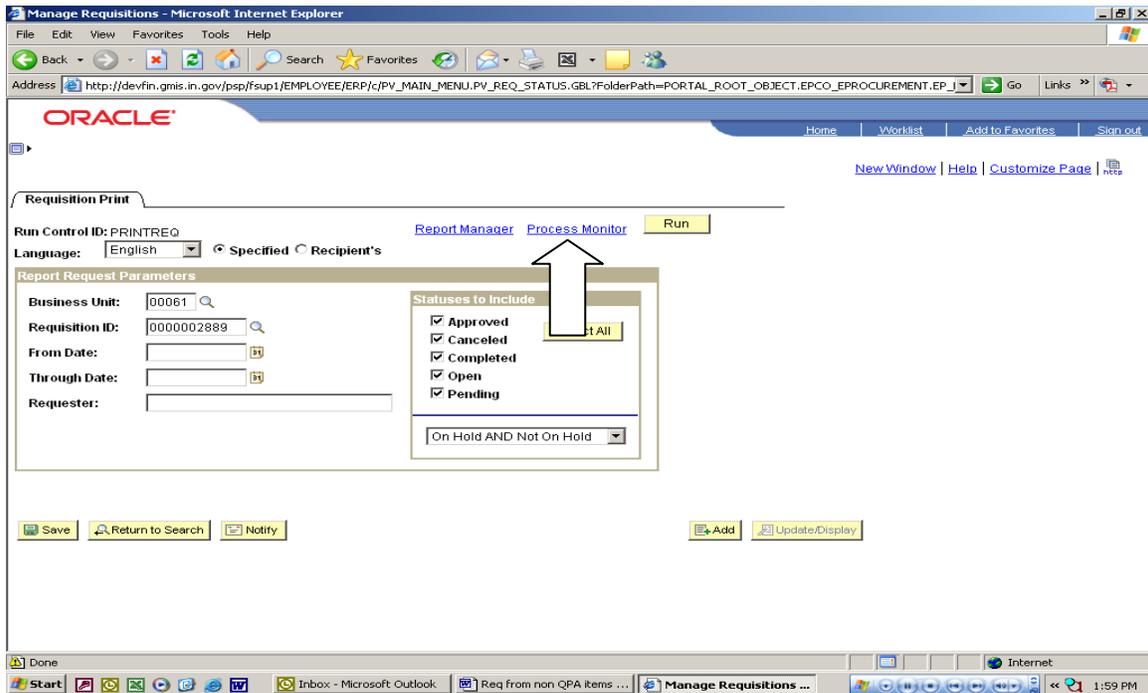
To continue the processing click the Run button. This will take you to a new screen.



The following screen is used to select the Server on which the process will be run. In the Server Name field set the field to blank. This allows the process to run on the first available server. Once the Server Name field is set to blank clicking the OK button will run the creation process.



After clicking the OK button you will be taken back to the Requisition Print screen. Once here click the Process Monitor link.



After clicking the Process Monitor link the following screen will allow the PDF creation process to be monitored and to be able to access and print a copy of the requisition PDF. At this screen your process will be the top line listed. You want the Run Status column to be Success and the Distribution Status column to be Posted. If either of these is not what is required, you will need to click the Refresh button about every eight (8) seconds or so until both have become the required status.

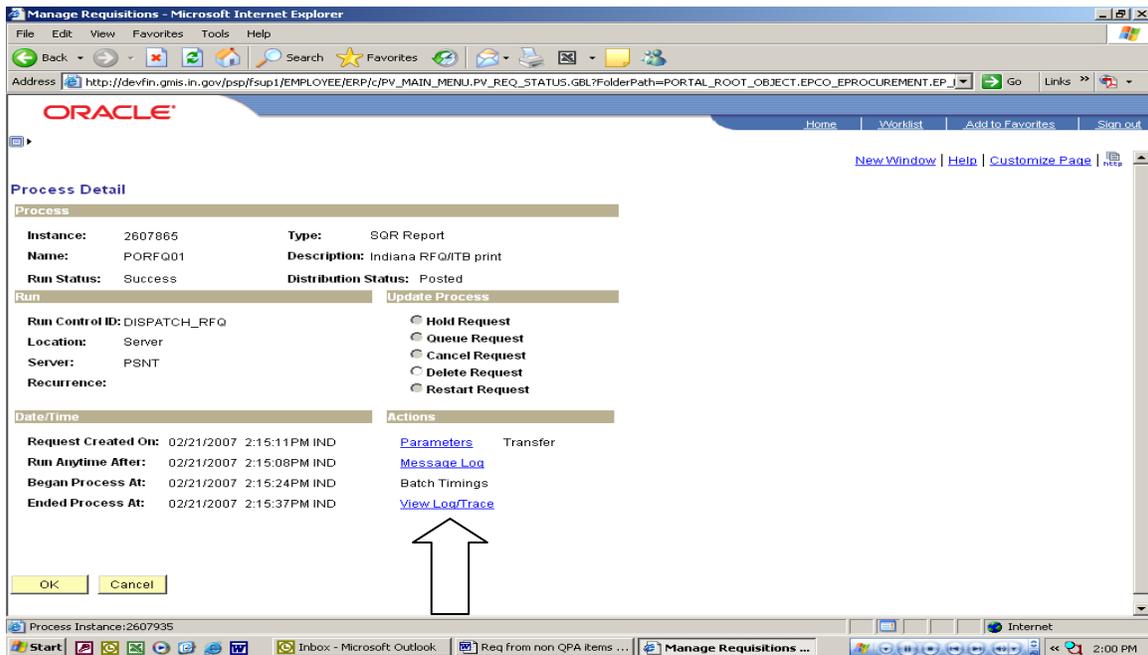
Once all statuses are what they need to be, then click the Details link to be taken to the next screen.

The screenshot shows the Oracle Manage Requisitions interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, there are tabs for 'Process List' and 'Server List'. A search area allows filtering by 'User ID', 'Type', 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is present. The main area contains a table with the following data:

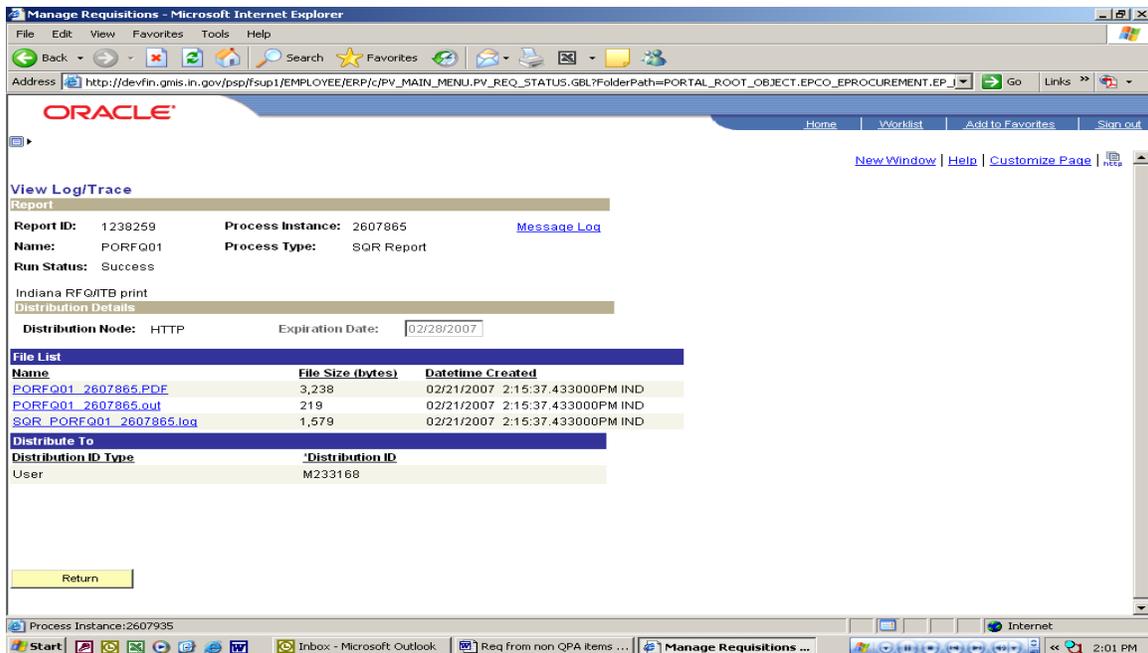
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2607935		SQR Report	PORQ010	M233168	02/22/2007 2:00:04PM IND	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	2607865		SQR Report	PORFQ01	M233168	02/21/2007 2:15:08PM IND	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2607864		Application Engine	FS_BP	M233168	02/21/2007 2:11:49PM IND	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2607863		SQR Report	PORQ010	M233168	02/21/2007 2:07:58PM IND	Success	Posted	<a href="#">Details</a>

Three arrows point to the 'Run Status' and 'Distribution Status' columns of the first row. Below the table, there are 'Save' and 'Notify' buttons, and a link to 'Go back to Requisition Print'. The bottom of the screen shows the Windows taskbar with the 'Manage Requisitions' window active.

At this screen you will need to click on the View Log/Trace link.



After clicking the View Log/Trace link you will see the following screen and you will be looking for a link with the ending of PDF. This link will give you a PDF of your requisition. To open and print the PDF you will need to click the link. This might open a security alert box, click yes and the requisition PDF should open up. At this time print a copy of the PDF and close.



To finish your processing see the user guide titled: Expediting Requisition to PO.