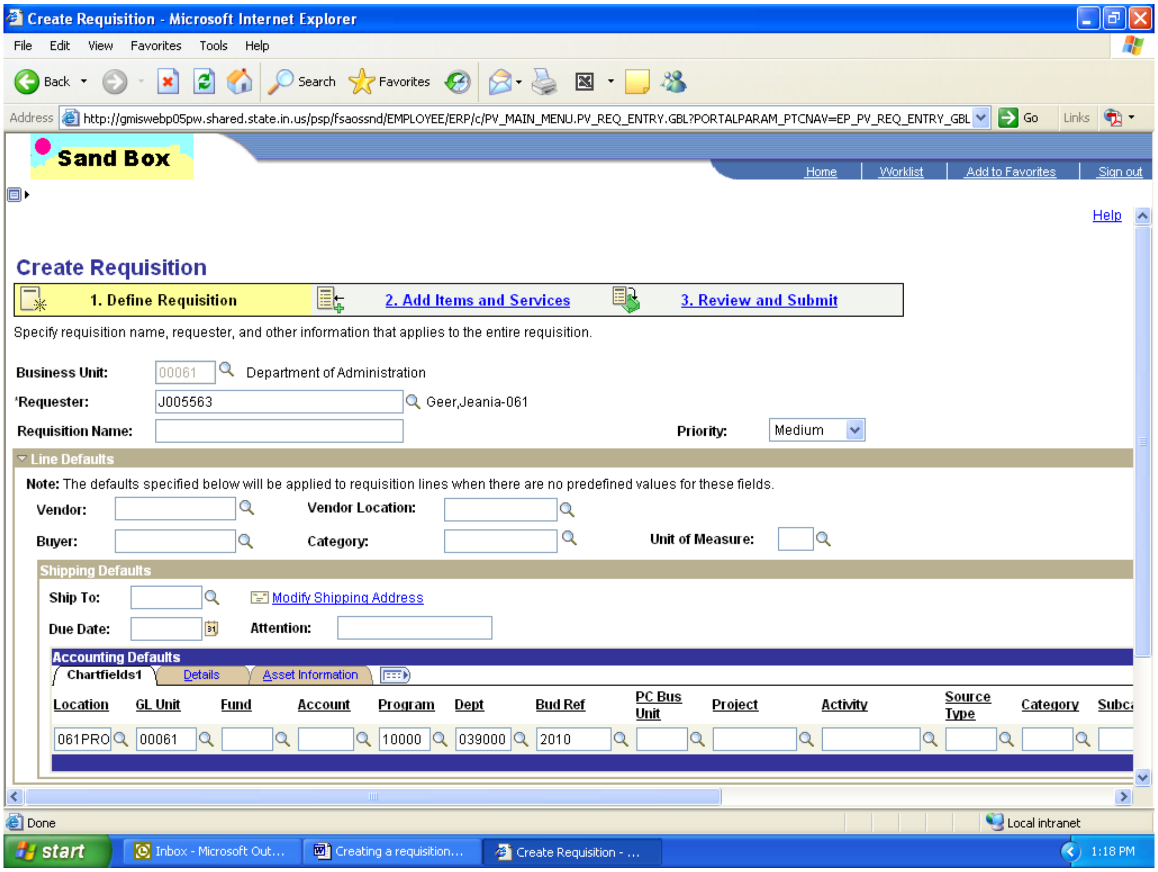
CREATING A REQUISTION FOR QPA OR VENDOR CATALOG ITEMS

Menu Navigation:

- **eProcurement**
  - **Create Requisition**

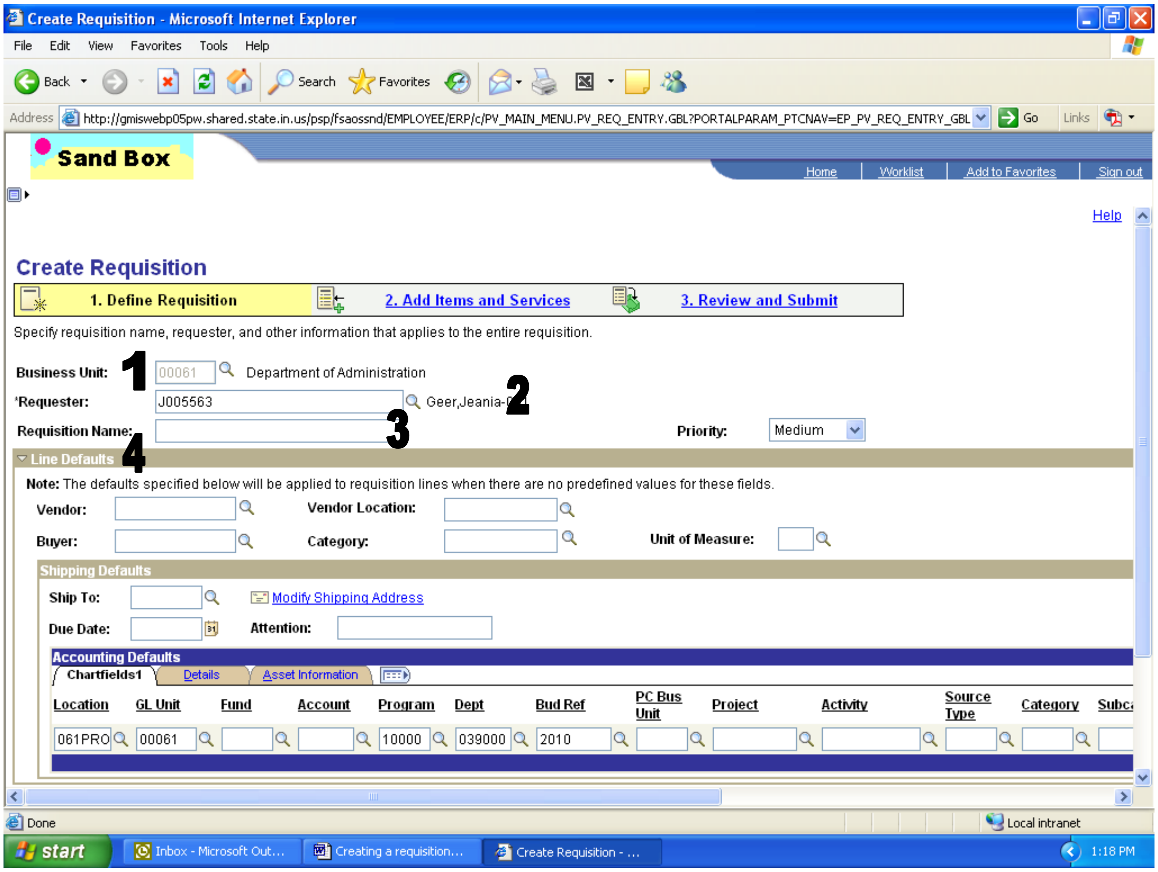
Upon navigation you will come to the screen shown below. Notice that the step of process of creating a requisition is noted in yellow.



Define Requisition

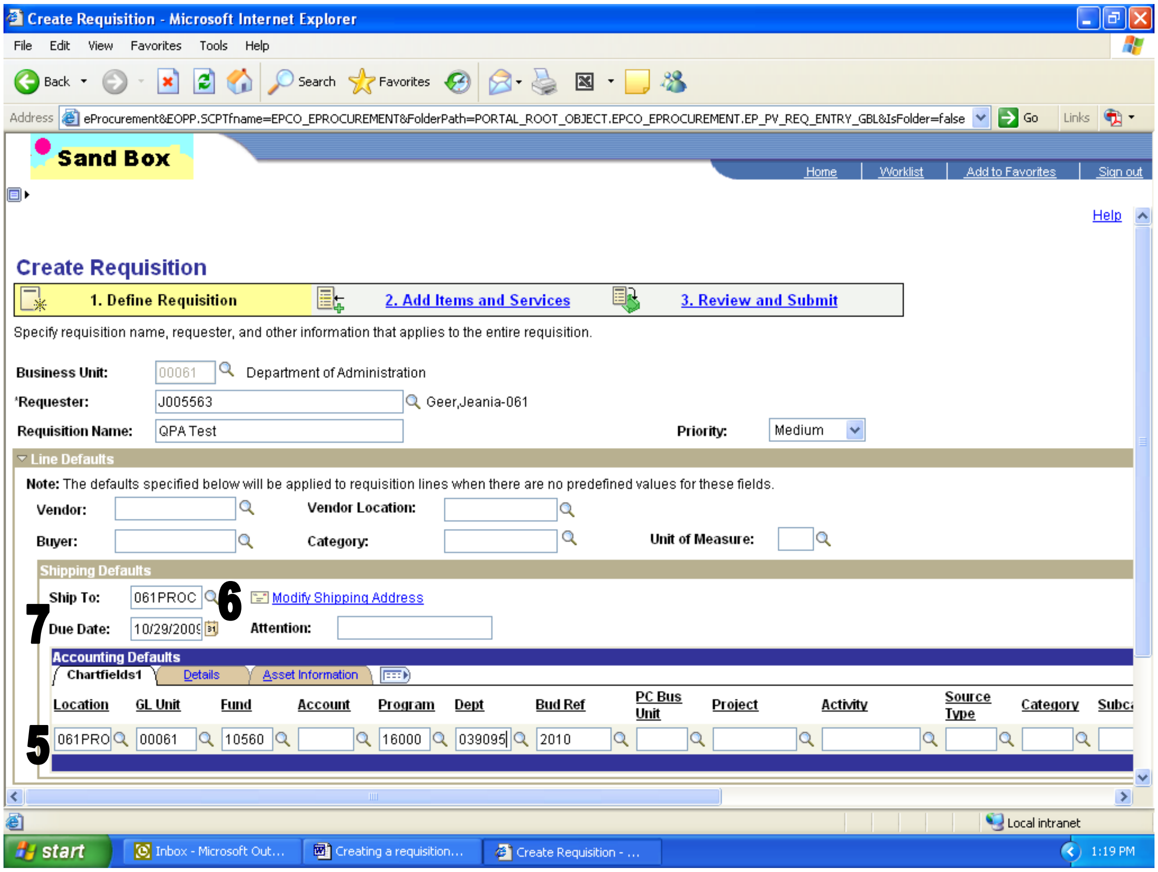
At the Define Requisition screen you are able to change or add several fields:

1. Business Unit
2. Requestor
3. Requisition Name
4. Line Defaults (Chartfields)



Next you may need to edit items under the Line Defaults section. These items are:

5. Accounting Defaults (Chartfields)
6. Ship To location
7. Due Date (not required)

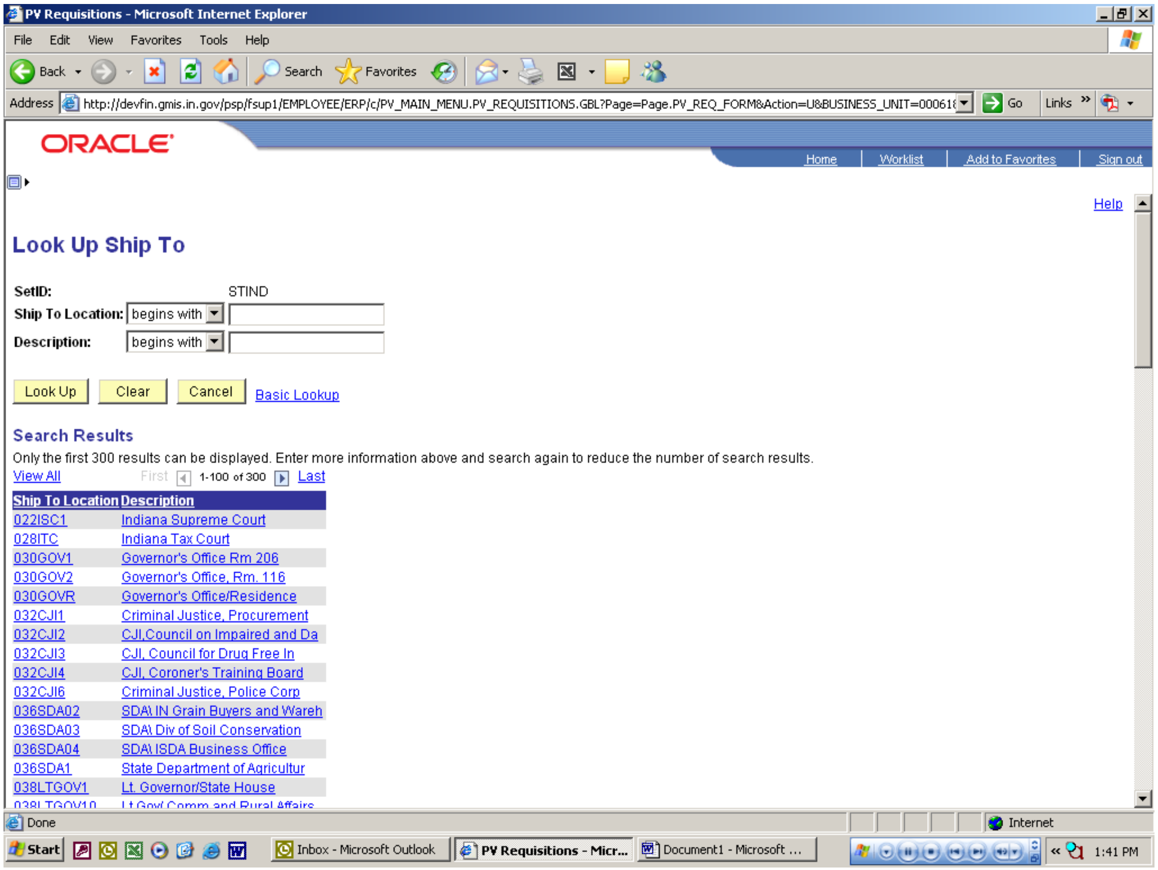


5. Accounting Defaults (Chartfields)

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

6. Ship To Location

You can click on the magnifying glass icon next to the Ship To field to look up the location. 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.



7. Due Date (not required field)

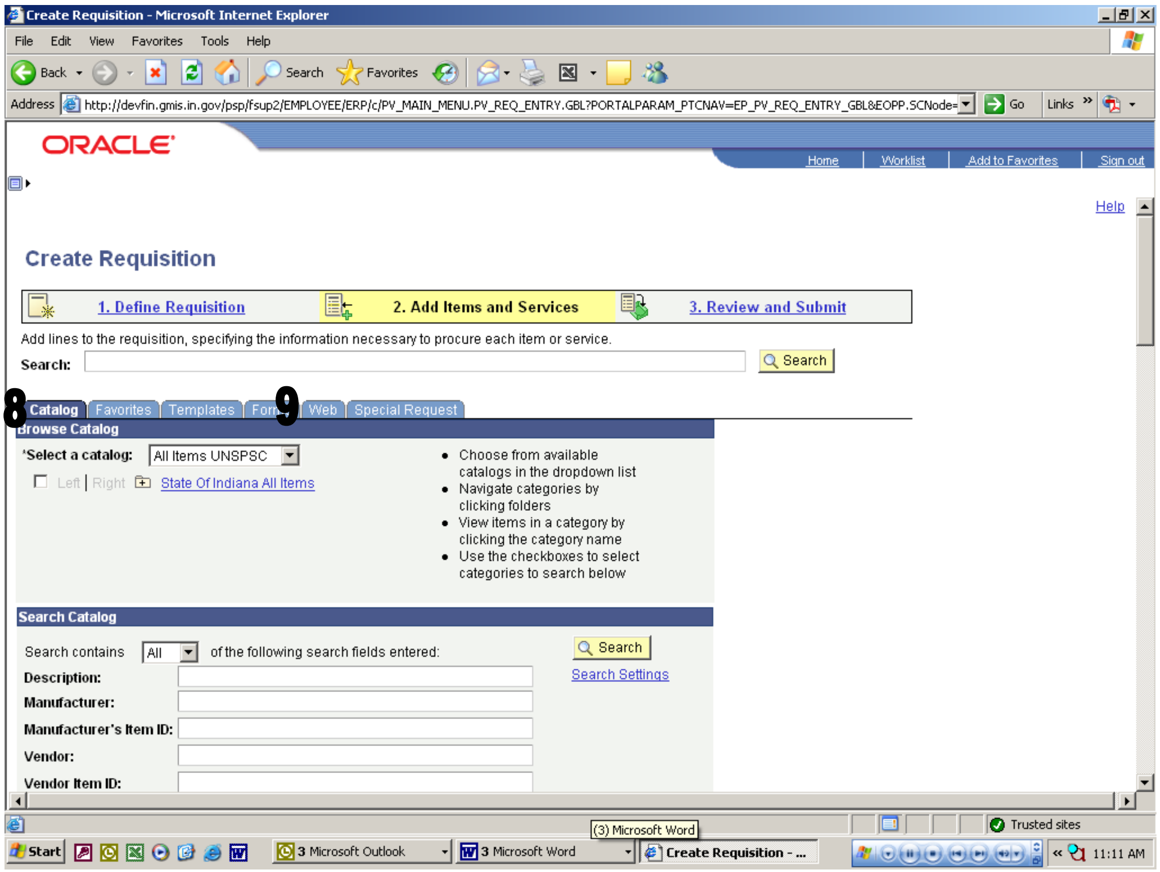
Enter date in MM/DD/YYYY format or use the calendar page icon to the right of the field for entry of the date.

Once all items 1 through 7 have been entered click the yellow Continue button or the Add Items/Services tab to pick the items from the PeopleSoft catalog (QPA items) or the vendor punch-out catalog to be purchased from.

Add Items and Services

Once you have gotten to the Add Items and Services screen you will have to select one of two tabs.

8. Catalog
9. Web



8. Catalog

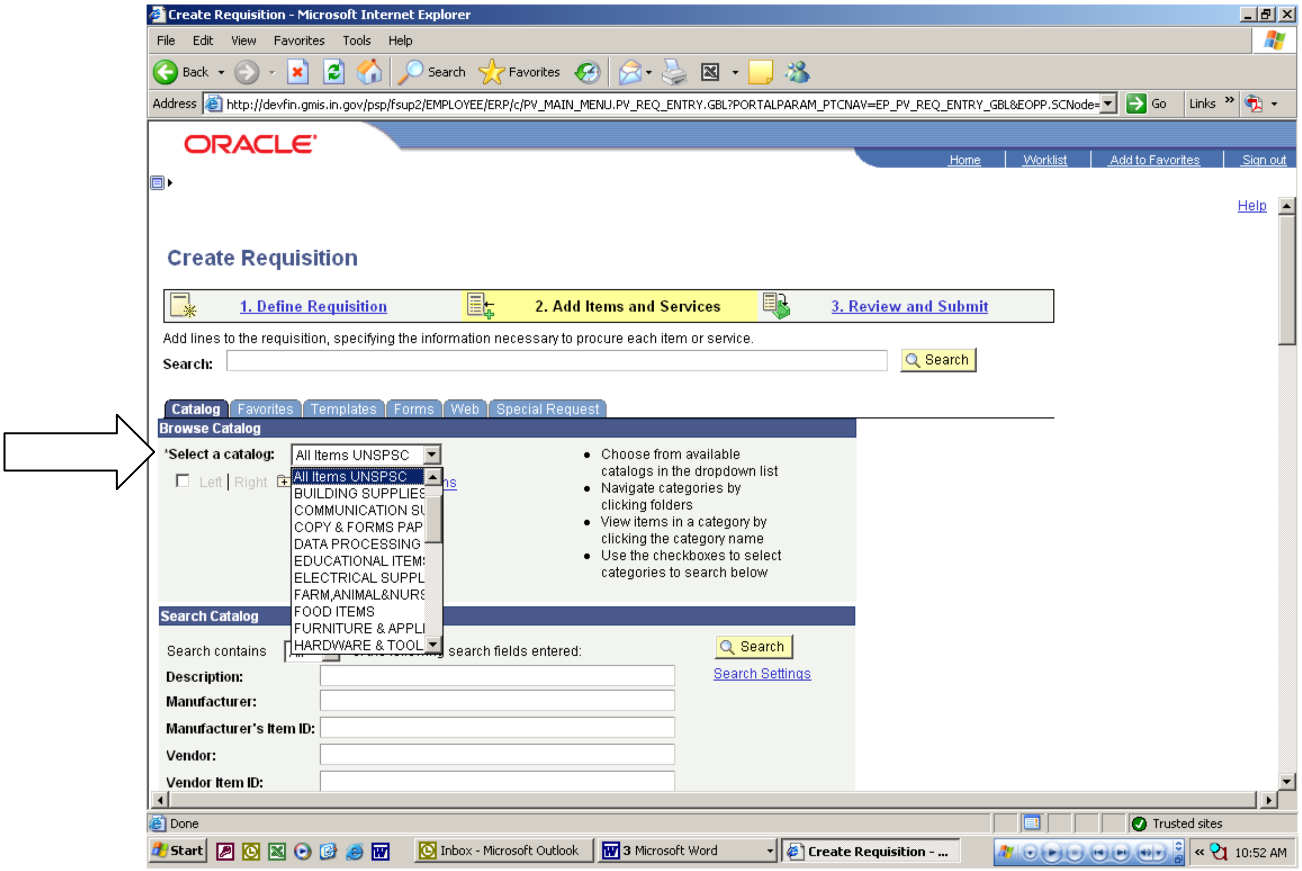
Use this tab if you are going to be searching for items from a non punch-out catalog.

9. Web

Use this tab if you are going to be searching for items from punch-out catalogs. These catalogs include but are not limited to: Dell, Fastenal and Staples.

Using Catalog Search

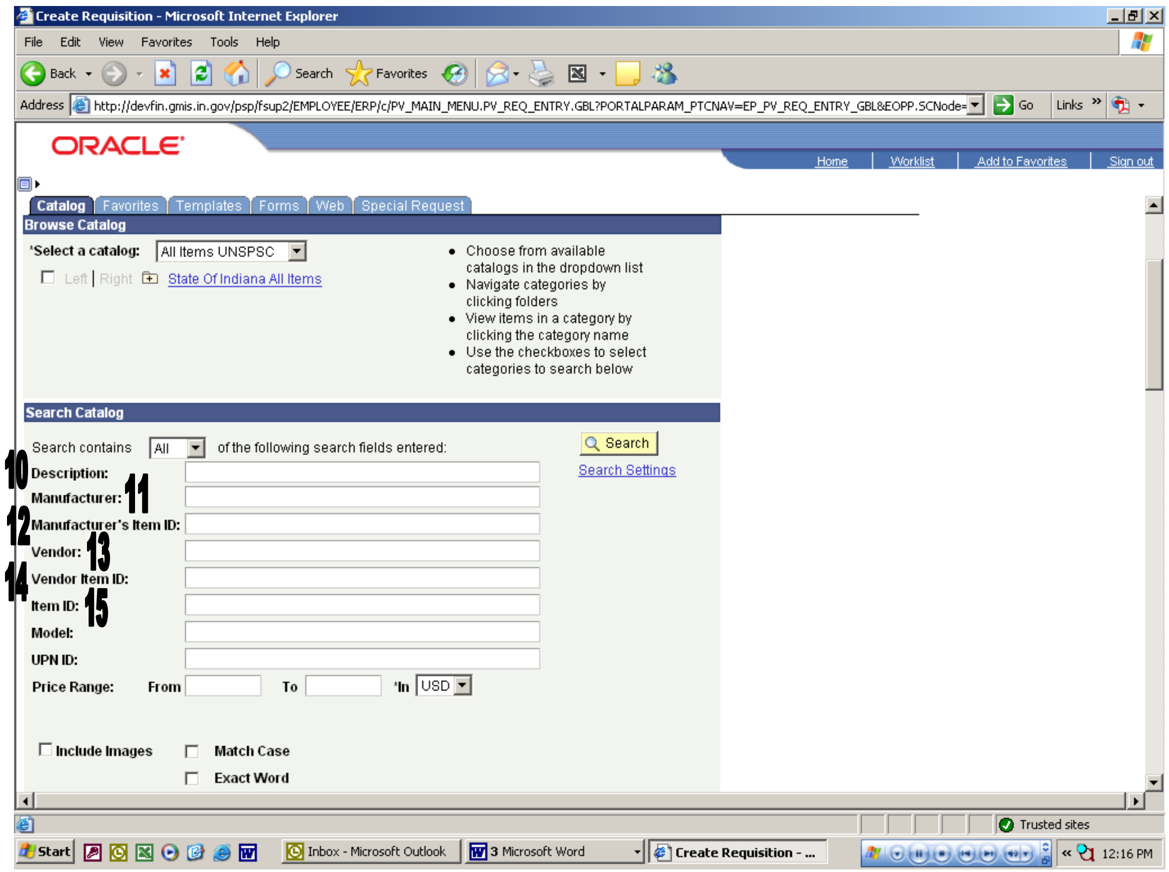
Click the Catalog Tab to see the catalog search page. At the catalog search page you will need to **ALWAYS** change the Select a catalog dropdown to be All Items UNSPSC. This will allow you to search for any item located in the State of Indiana item catalog.



Once you have selected the correct catalog you will need to search for the item you want to add to your requisition. There are several ways to search.

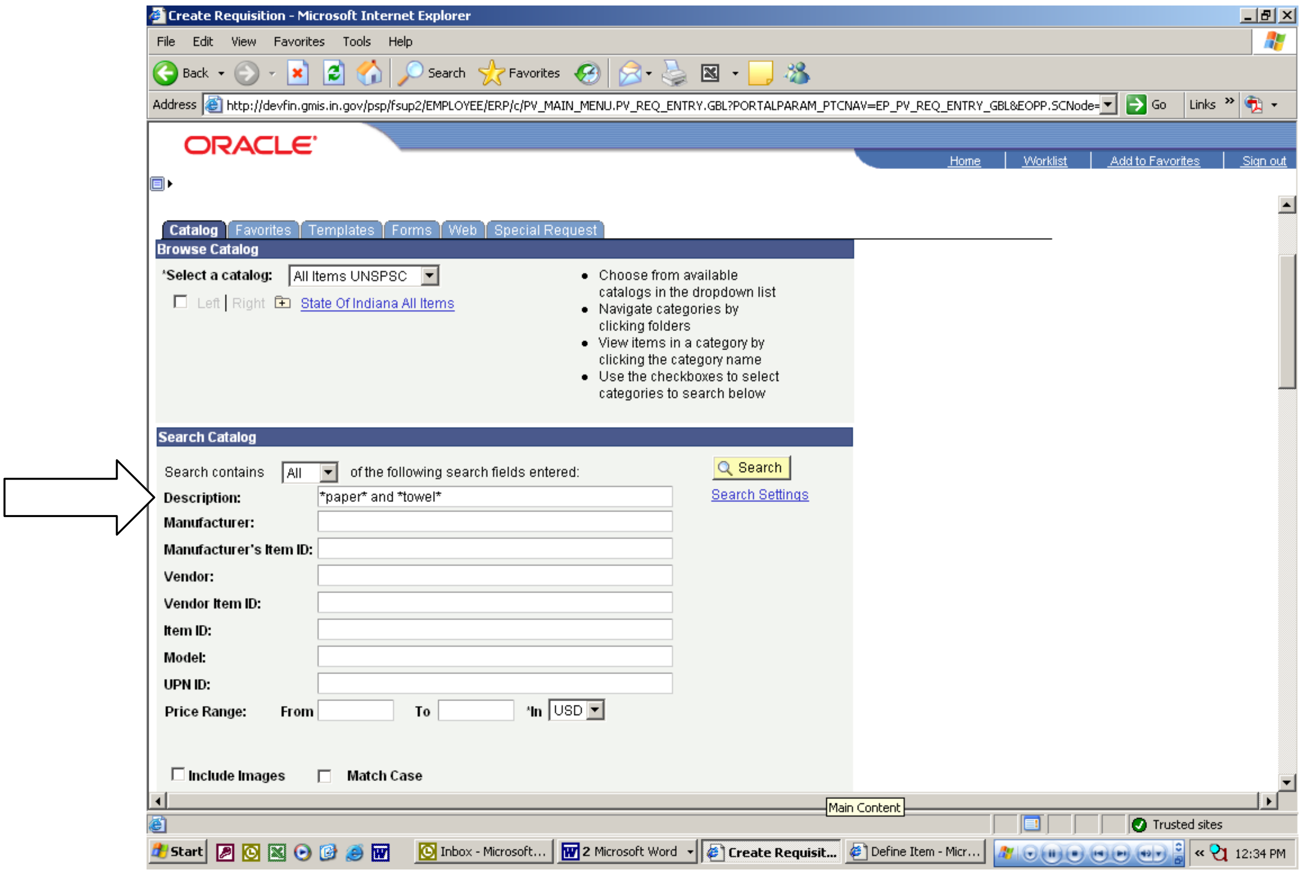
Search Criteria:

10. Description
11. Manufacturer
12. Manufacturer's Item ID
13. Vendor
14. Vendor Item ID
15. Item ID

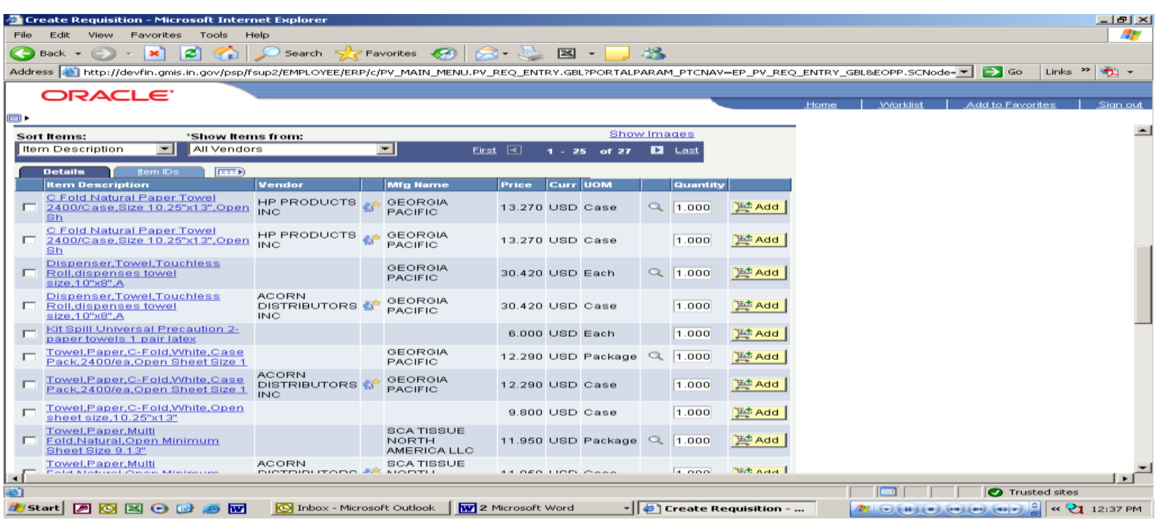


10. Description

Enter a basic description of the item to be purchased. For the best results enter key words to search by. Place an asterisk before and after each descriptive word (ie *paper*). To search by more than one descriptive word you should include the word “and” between each descriptive word (ie “paper” and “towel”). This search will give you all items that contain the words “paper and “towel”.



This search will give you all items that contain both paper and towel in the description. The following screen shot shows the results from this search.



11. **Manufacturer**

    Enter the manufacturer of the item for which you are searching. This method is not recommended for all items as the catalog does not always have this information.

12. **Manufacturer's Item ID**

    Enter the manufacturer's item number to search. This method is not recommended for all items as the catalog does not always have this information.

13. **Vendor**

    Enter the name of the vendor to search for all items that are in the catalog for this vendor.

14. **Vendor Item ID**

    Enter the vendor's item number if known. This method is not recommended for all items as the catalog does not always have this information.

15. **Item ID**

    This is the PeopleSoft item number assigned by IDOA Procurement. This generally is in the format of a 18 digit number (can use the wildcard key *). This will only pull up the item and vendors assigned to this item. **This is the best search if the item number is known.**

    If there are multiple vendors for one catalog item, then do the search and when it returns the item, click on the blue Item Description link and it will bring up all the vendors. Then click on the yellow Add button for the appropriate vendor and it will pull the item into your requisition. Navigate to the Review and Submit screen where you can click on the Quantity box to make any adjustments to the quantity and continue processing.

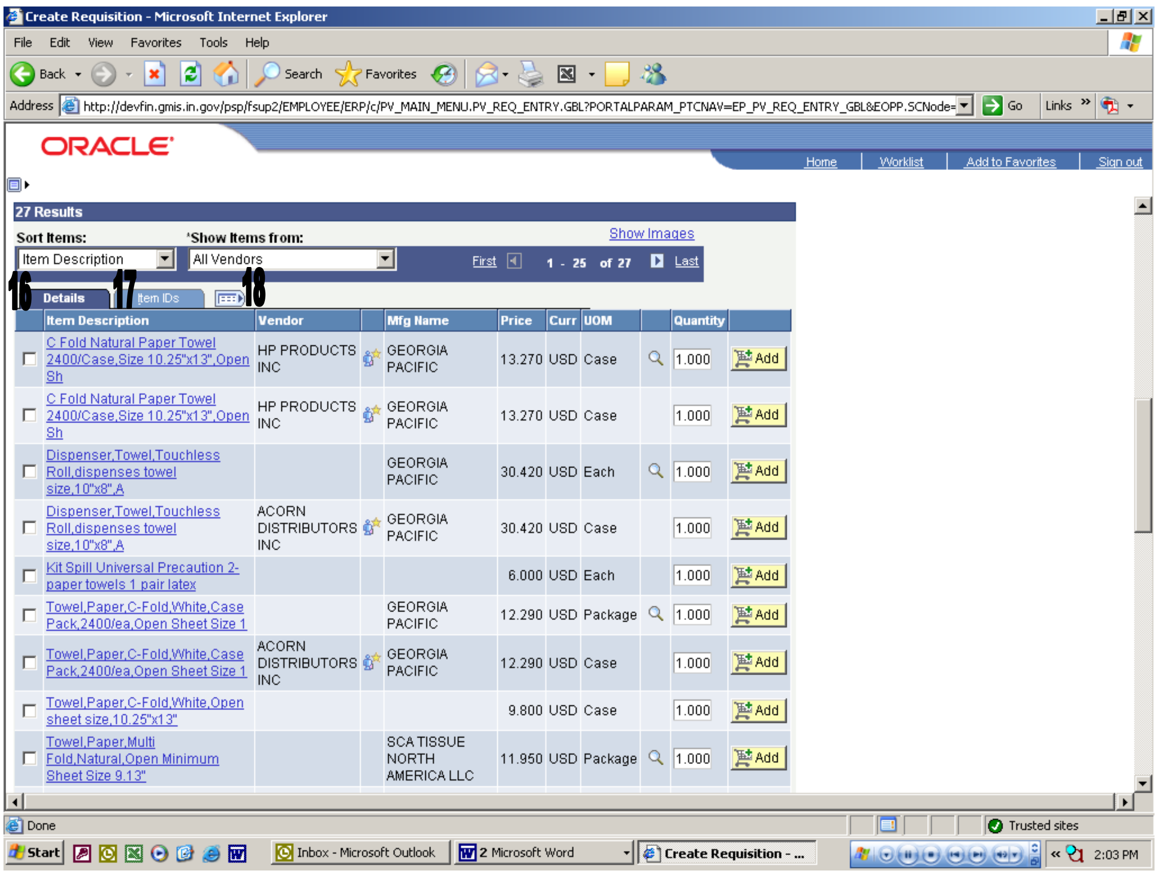
Once you have entered the search criteria you want to search by you will then click the yellow submit button to obtain all of the items that meet your criteria. The next steps will show you how to add the item you want to your requisition.

Add item from catalog to requisition

You will see results that look like the screen shot below for all items found based on your search criteria. You must determine which item or items from the results that you want to purchase. There are three places information for each item is displayed that will help you determine the correct item you need to put on your requisition.

The item information is contained in:

16. Details
17. Item IDs
18. Show all Columns



16. Details

The Details Tab gives six (5) different pieces of information on the item you have found during your search. These are Item Description, Vendor, Mfg Name, Price and UOM. This tab also allows you to enter the quantity of an item and add it to your requisition.

17. Item IDs

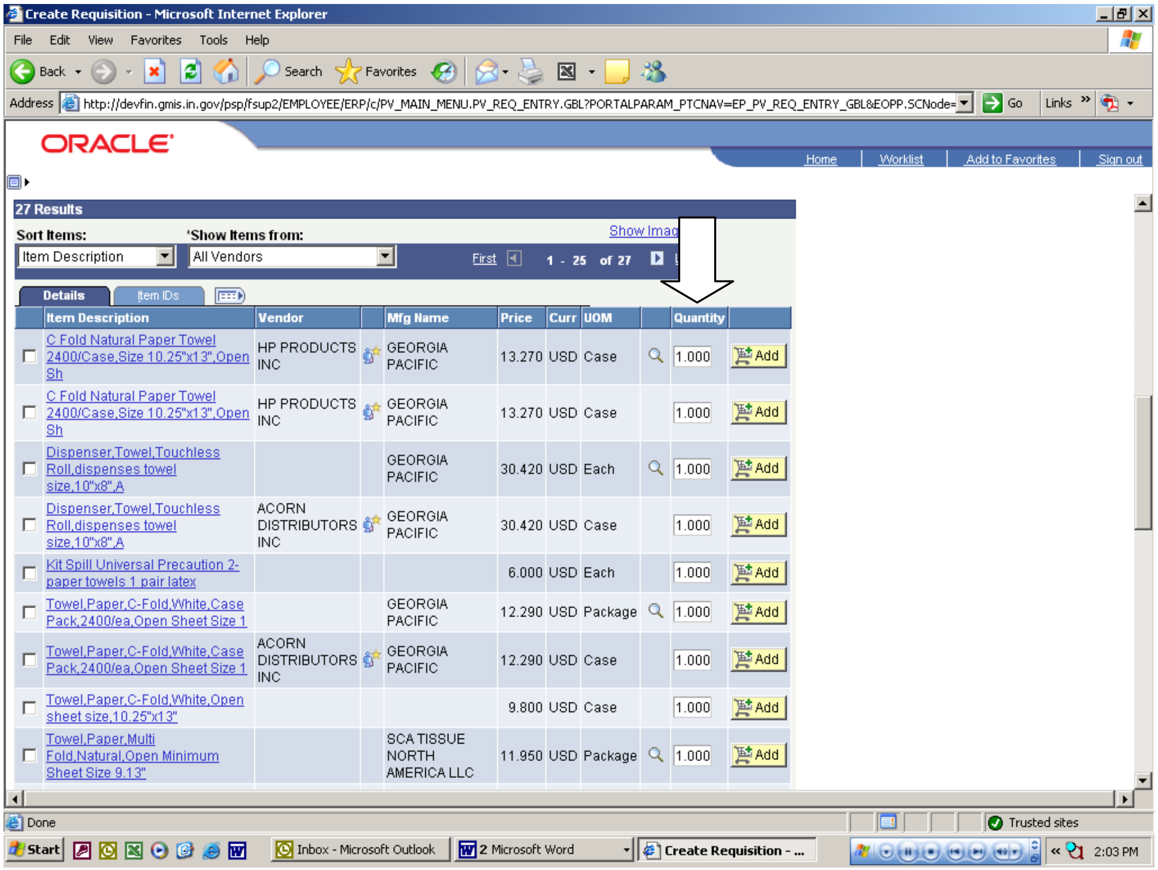
The Item IDs Tab gives five (5) more pieces of information on the item found during your Search. These are Item description, Item ID, Vendor Item ID, Manufacturer ID and Mfg Item ID.

18. Show All Columns

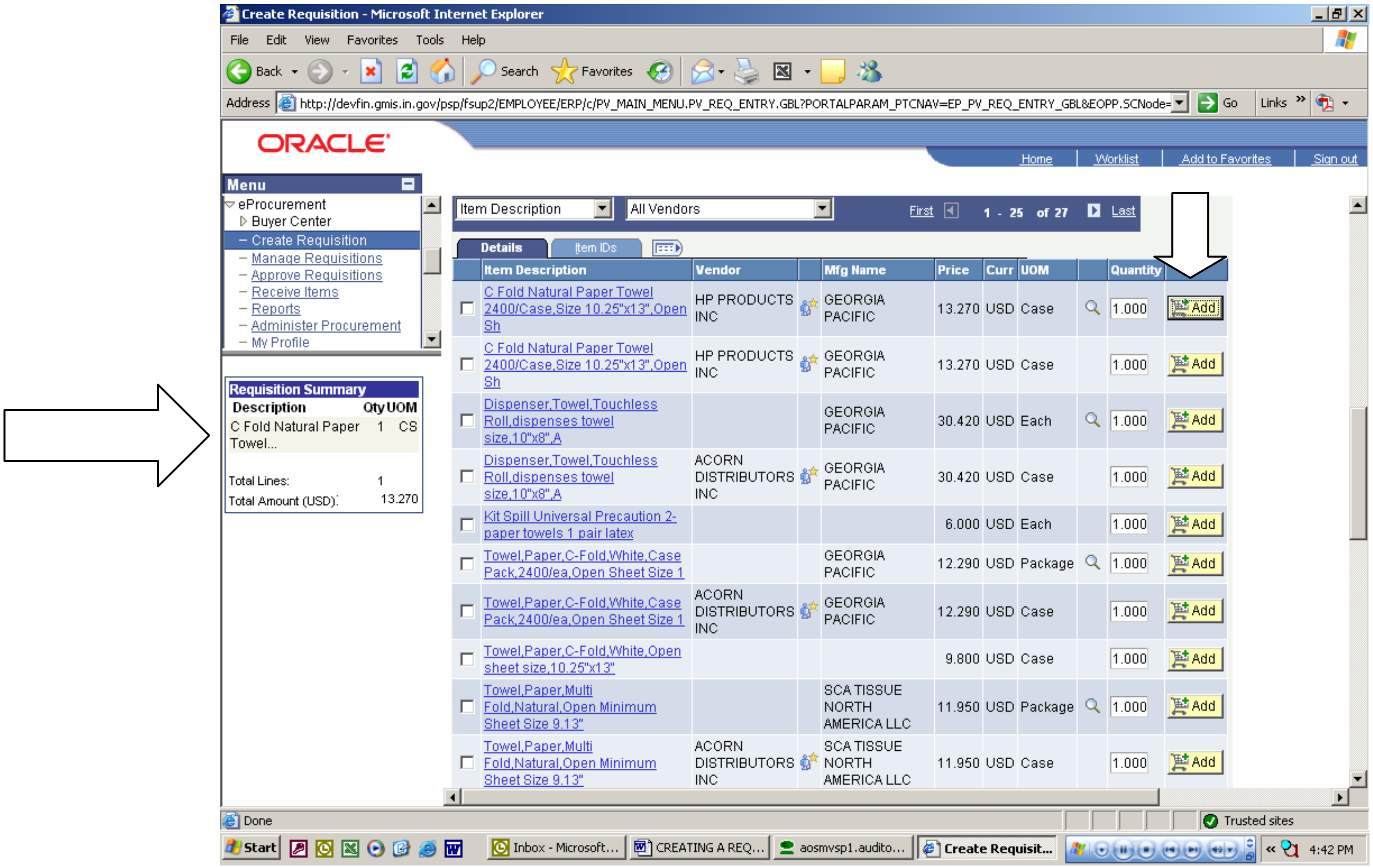
This gives the user all columns listed under both the Details and Item IDs. This should be used at all times to allow the user to see all information in one page.

You can either review the details on both tabs or click on the Show All Columns icon to determine if the item found is the one you want to order.

Once you have determined the item or items you want to purchase from the list of items you found during your search you will need to add the quantity of your order to the item(s). To add the quantity you need to place the quantity needed in the Quantity field.



Next you need to add the item to your shopping cart (requisition). Click the Yellow Add button to add the item to your requisition. Once you have added the item to your requisition you may see a summary of the requisition to the left of the catalog items.



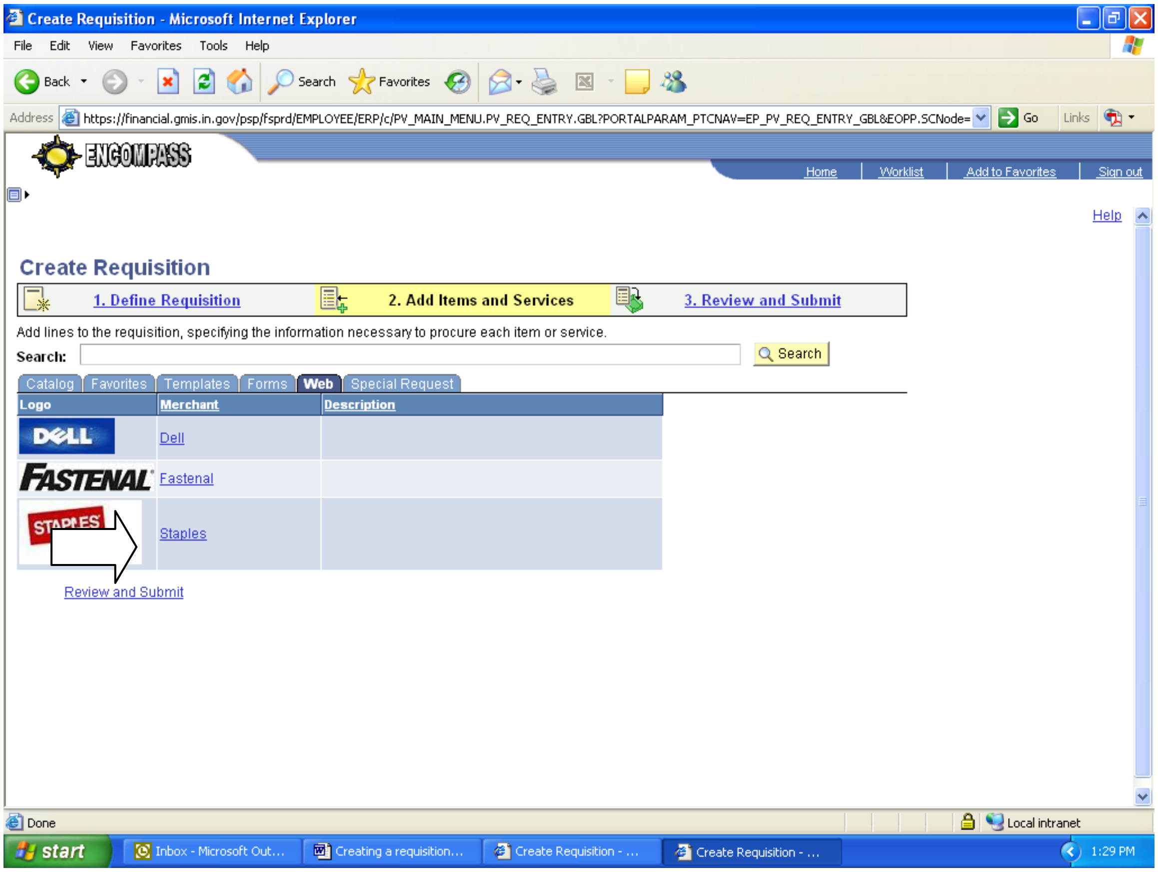
The summary shows the item description, the UOM, the item quantity, the total lines (requisition lines) and the total amount of the requisition.

REPEAT THE PROCESS UNTIL ALL ITEMS HAVE BEEN ADDED TO YOUR REQUISITION.

Once you have added all items to your requisition then click on the Review and Submit link at the bottom of the item search page or the Review and Submit tab at the top. This will take you to the procedures found under Review and Submit.

Using Web based catalogs (Punch-out catalogs)

Click on the Web Tab to see the available punch-out catalogs. At the punch-out catalog page click the blue link of the catalog you want to access.



Clicking on the link for the catalog will take you to the vendor web site. You will then have to follow the specific instructions posted for the punch-out site on the IDOA Procurement web site at http://www.in.gov/idoa/2342.htm. **Remember that while in the vendor web site you still have the 20 minute time to complete your order.**

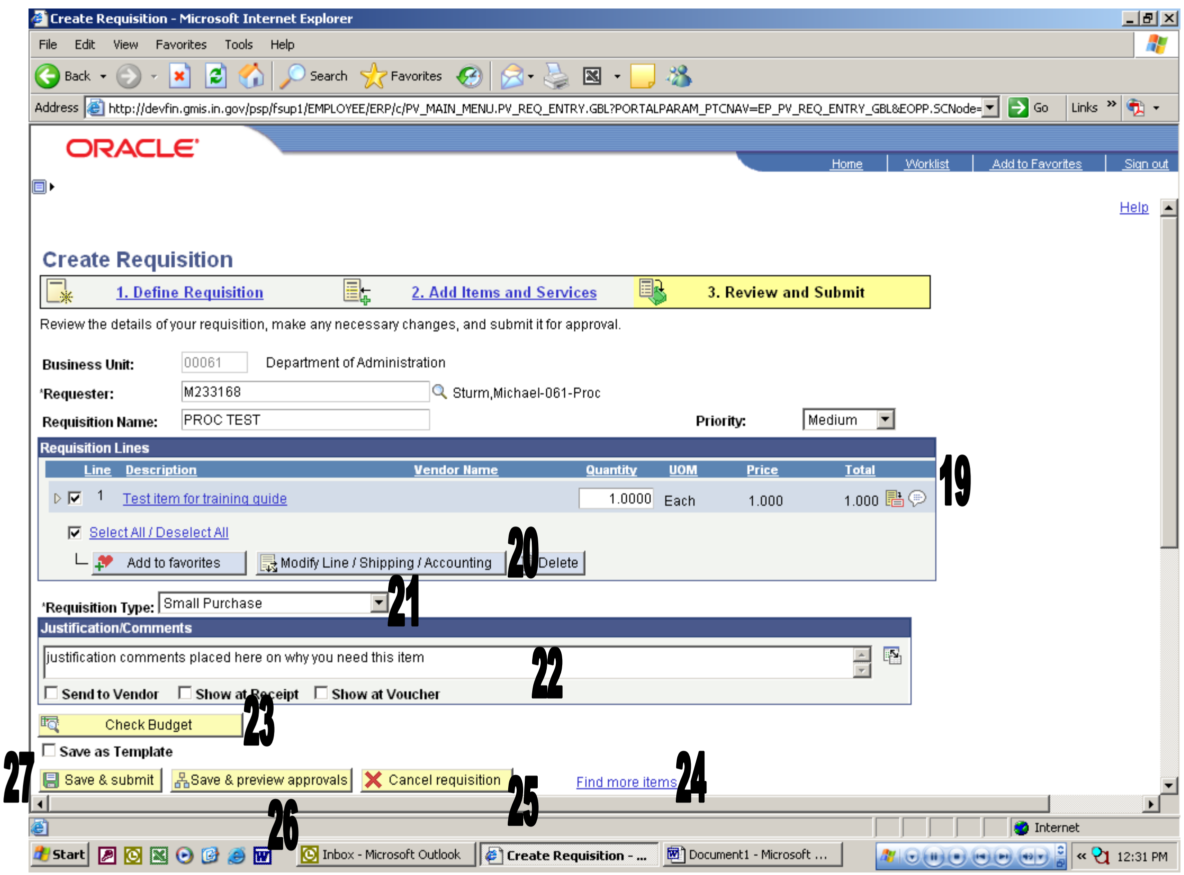
Once you have found all items and checked out of the vendor web site you will be brought back to PeopleSoft and you will need to click the Review and Submit link to continue processing of the requisition.

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.

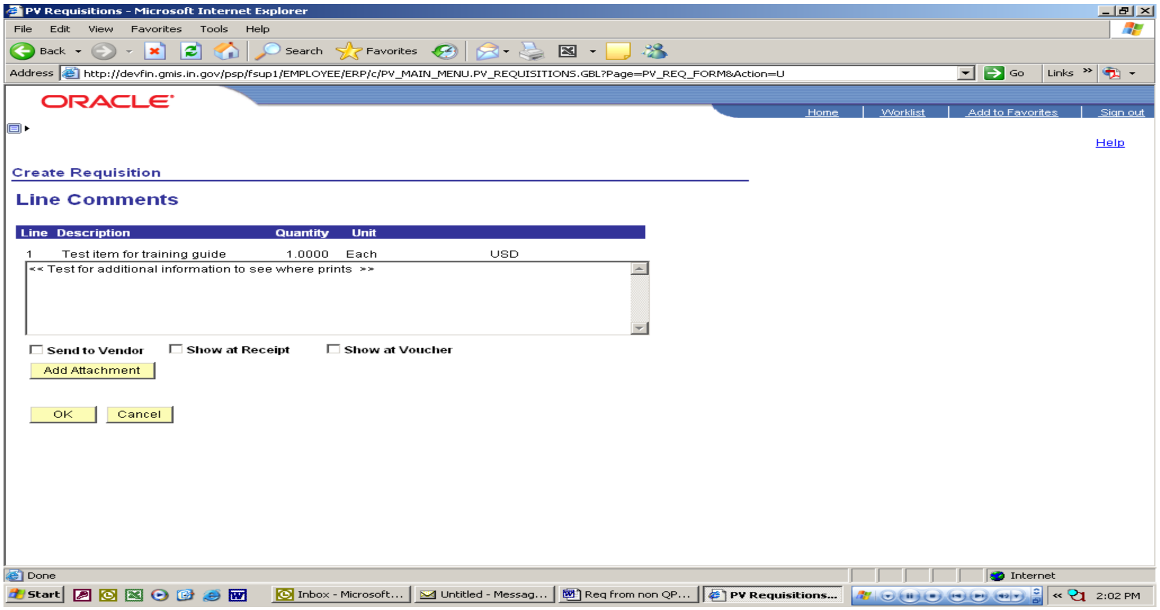
These tasks include:

19. Adding Line Comments
20. Modify Line/Shipping/Accounting information
21. Choose Requisition Type
22. Add justification comments for requisition
23. Check requisition budget
24. Add more items to requisition
25. Cancel requisition
26. Save & preview approvals
27. Save & Submit requisition to workflow



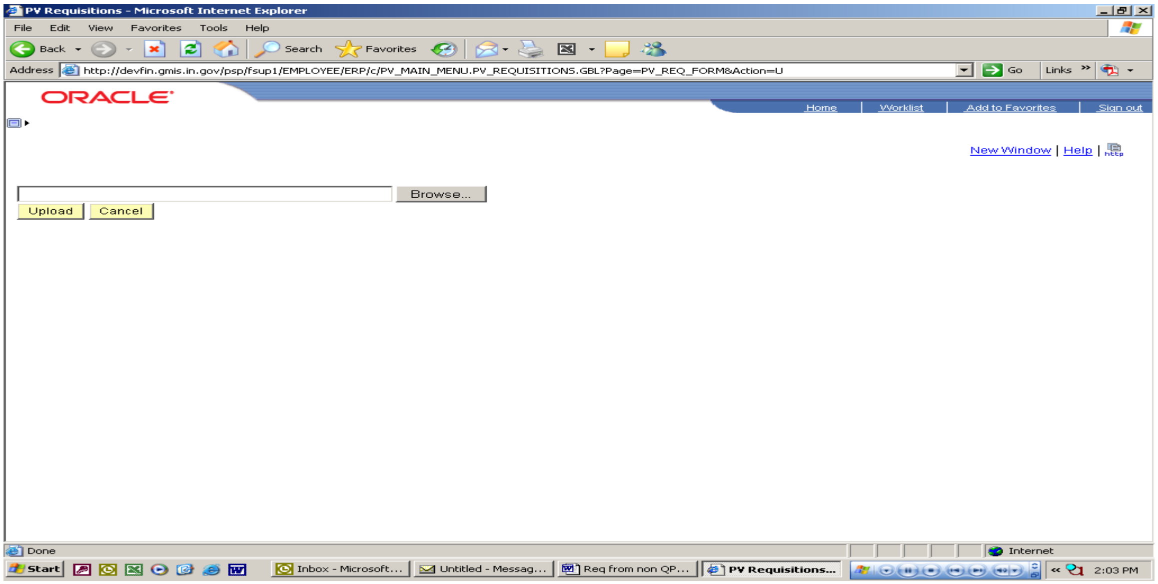
19. Adding Line Comments

To add line comments click on the Comments icon to open the Line Comments screen. Type the desired information and click OK. If the comments need to be printed on the requisition, RFQ or Purchase order, please make sure the **Send to Vendor** box is checked.

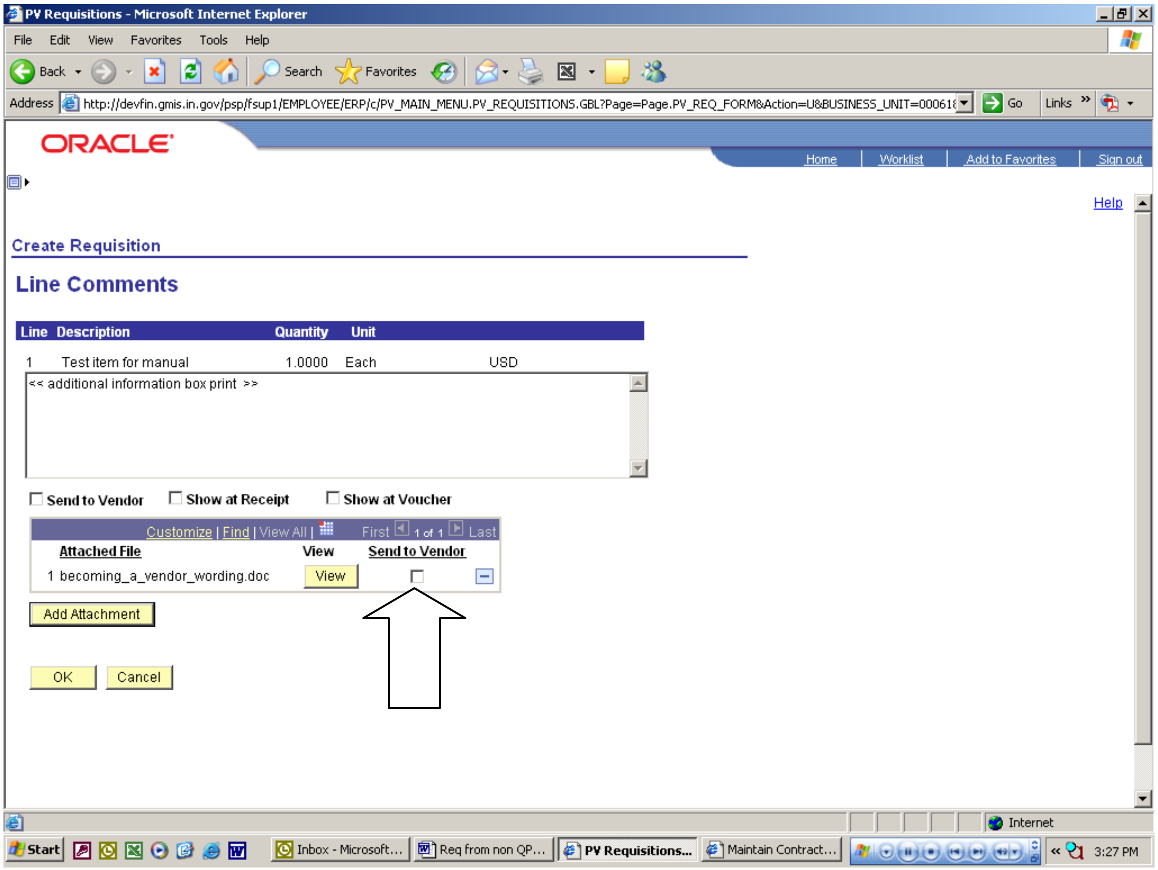


If you need to add attachments to the requisition

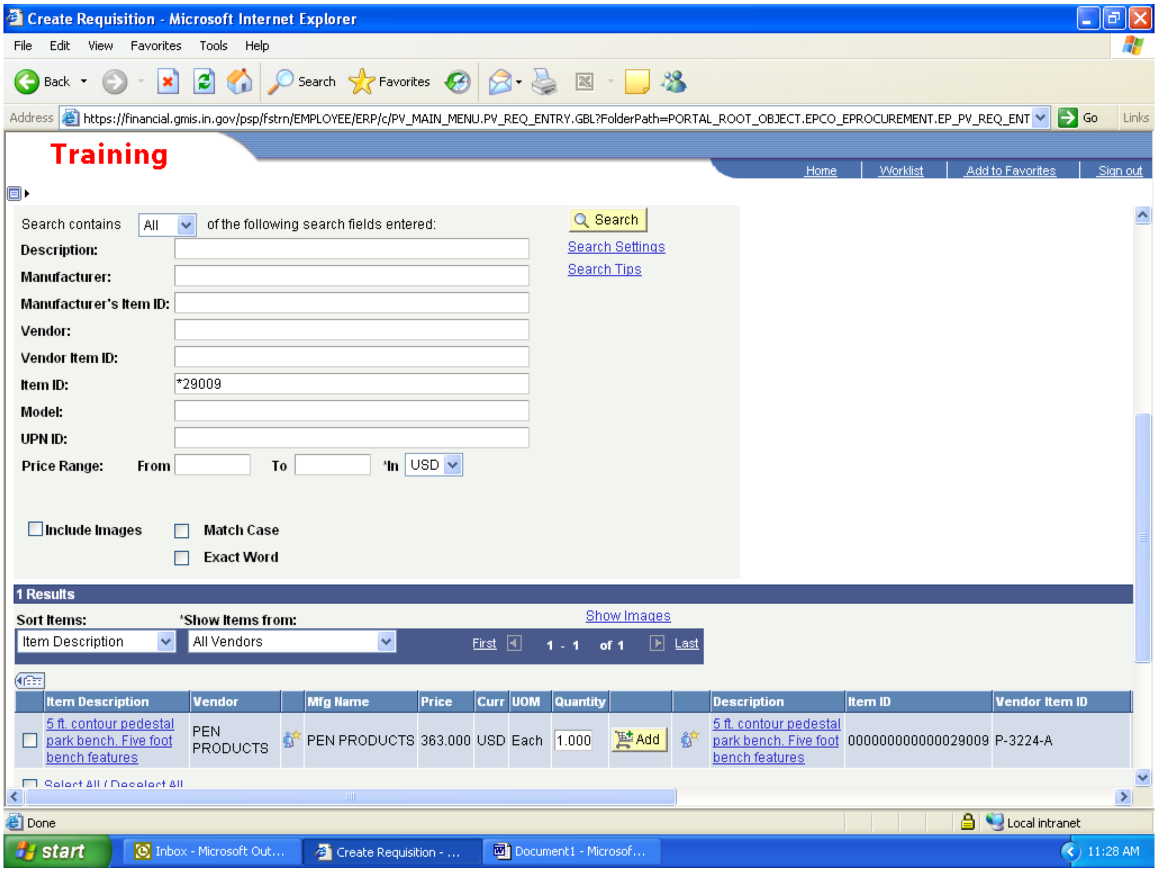
Click on the Add Attachment button and you will see the screen below that will allow you to search your computer for the attachment. Click the browse button (this will bring up your Windows menu) to search for the file you want to add as an attachment. Highlight the document name and click open, this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



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.

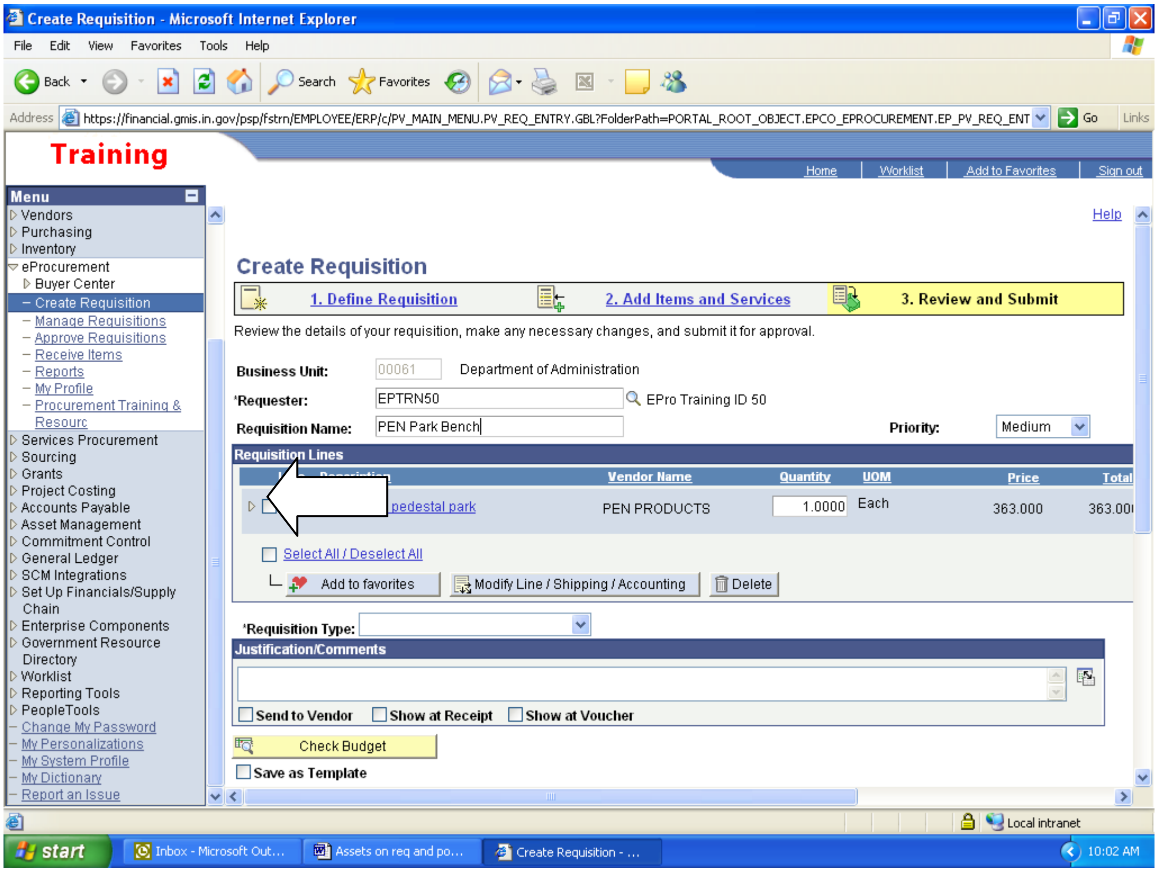


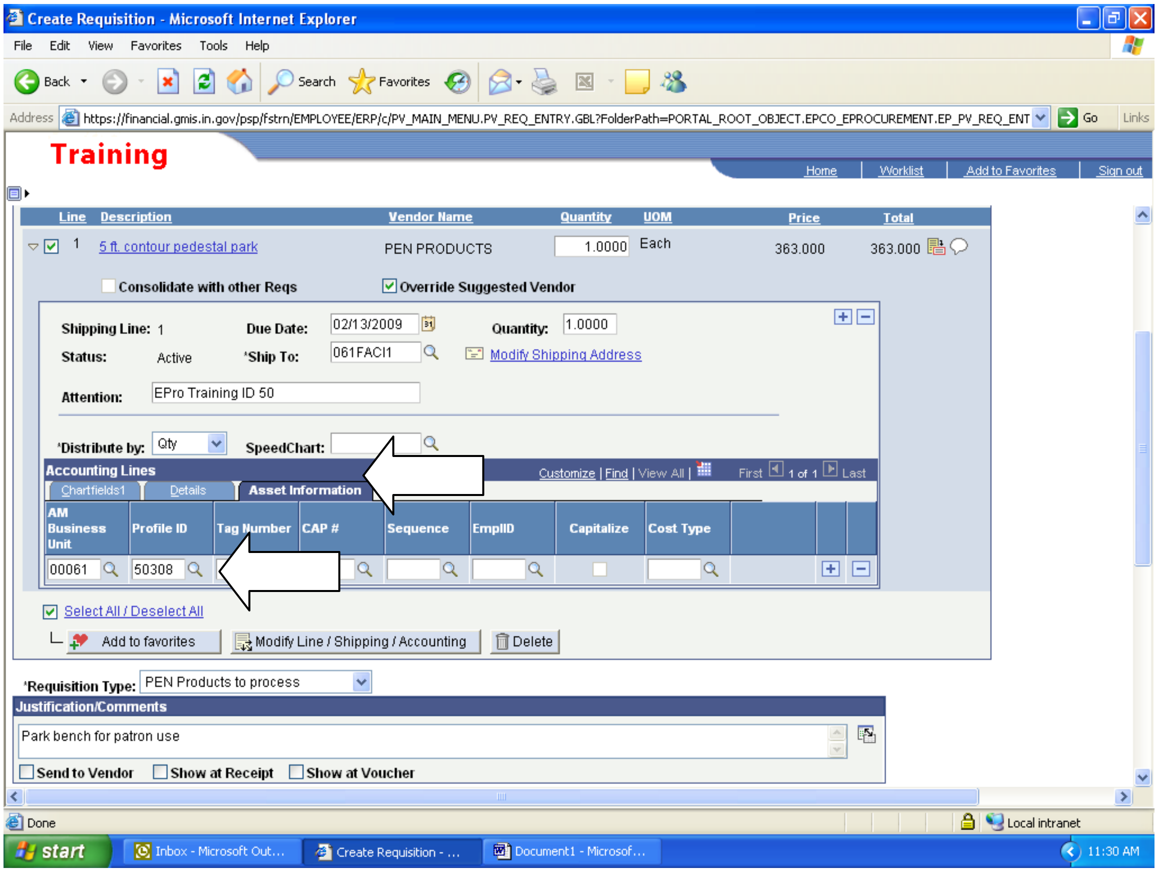
Verifying Asset information on the Requisition Line



The QPA item above will be brought forward as asset through the ePro catalog.

This should be verified (line by line) on the Review & Submit panel through opening the line details (yellow triangle to the left of the line), then clicking on the Asset Information tab under Accounting Lines as shown in the panels below.





The definition of an Asset Management asset is a capital asset purchase (or lease) where the total cost is $500 or more (single line item) and the expected life is one year or longer.

Purchases of assets are not required to go to Asset Management if the cost is less than $500 (single line item), unless the agency has extended this to include certain items of a lesser value. For example, the Indiana State Police would like to track firearms under the amount of $500 and can mark them as assets on the requisition/purchase order.

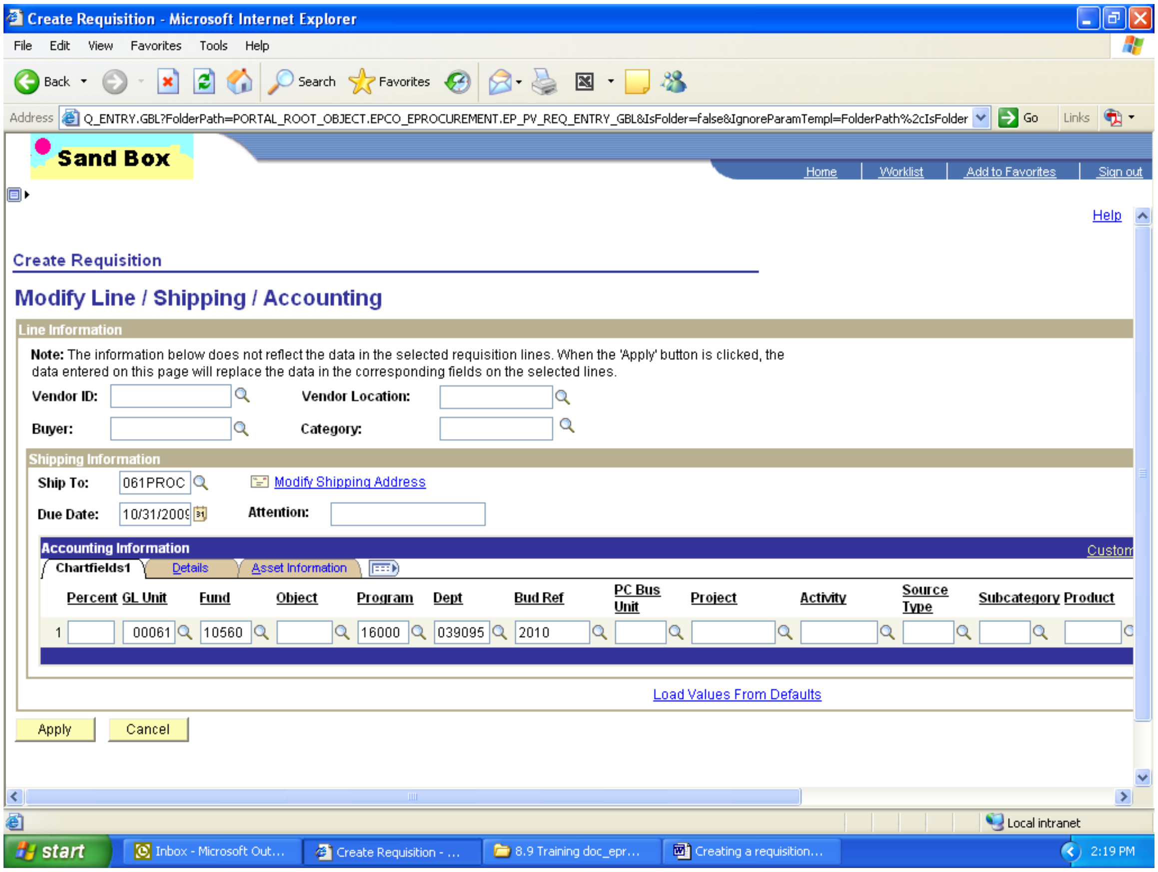
If a Requisitioner does not want an item to remain an asset, then he/she should remove the AM Business Unit and Profile ID on each line of the requisition (as needed). The Requisitioner can also make an item an asset that is not automatically set as one (through the UNSPSC code chosen) by adding the AM Business Unit and Profile ID on each line of the requisition (as needed).

Once the AM Business Unit and Profile are removed from the requisition line, it will not show as an asset on the corresponding purchase order line.

20. Modify Line/Shipping/Accounting information

You must confirm the shipping and accounting (Chartfields) information 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 link and the Chartfields will be populated from your defaults entered on the Define Requisition page.

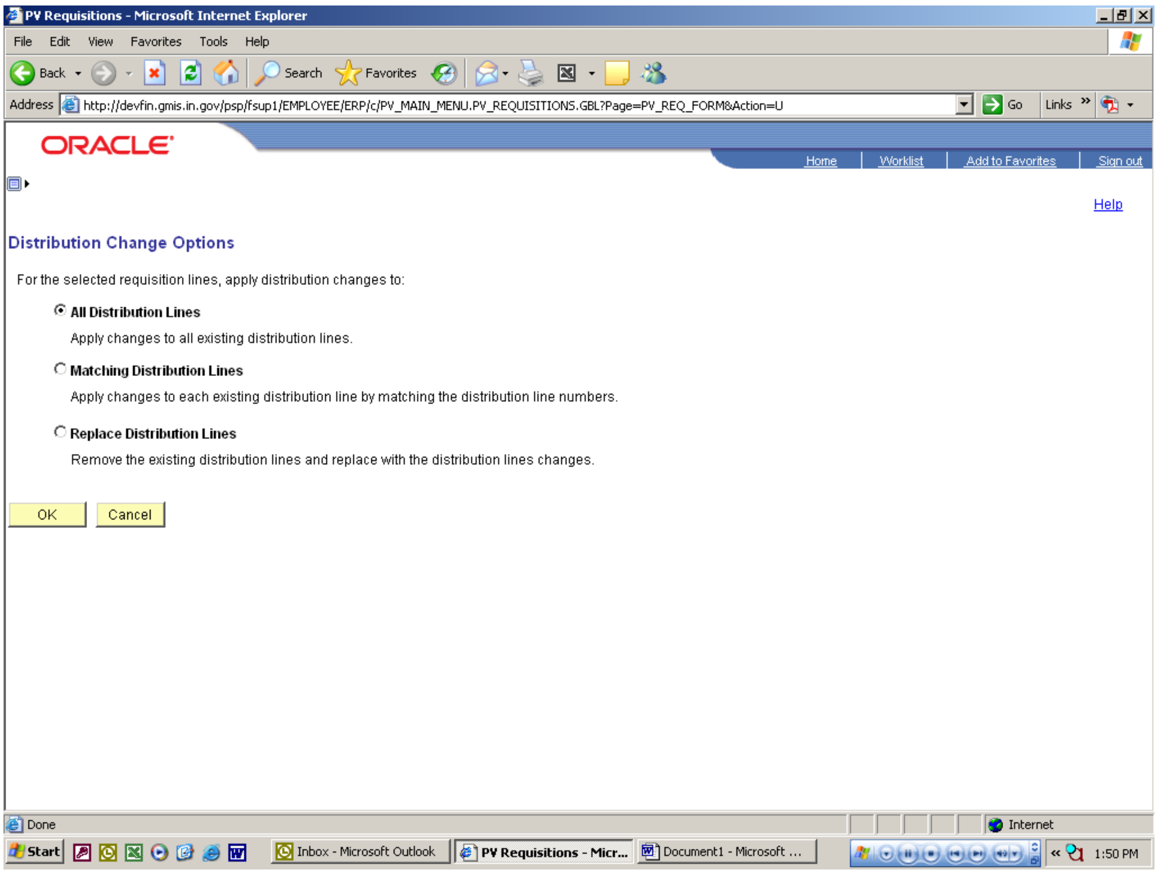
This is where you can add multiple distribution lines on the requisition by clicking the plus button at the end of the first row.



Once you have made all corrections or modifications to the Ship To and Chartfields you will be taken to the following screen.

At this screen you have three (3) options to choose from: 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.



21. Choose Requisition Type

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

22. 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, why purchasing outside current QPA, and 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.

23. 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 completed. **Budget checking can be completed at the Manage Requisition screen at a later time.**

24. Find more items link

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

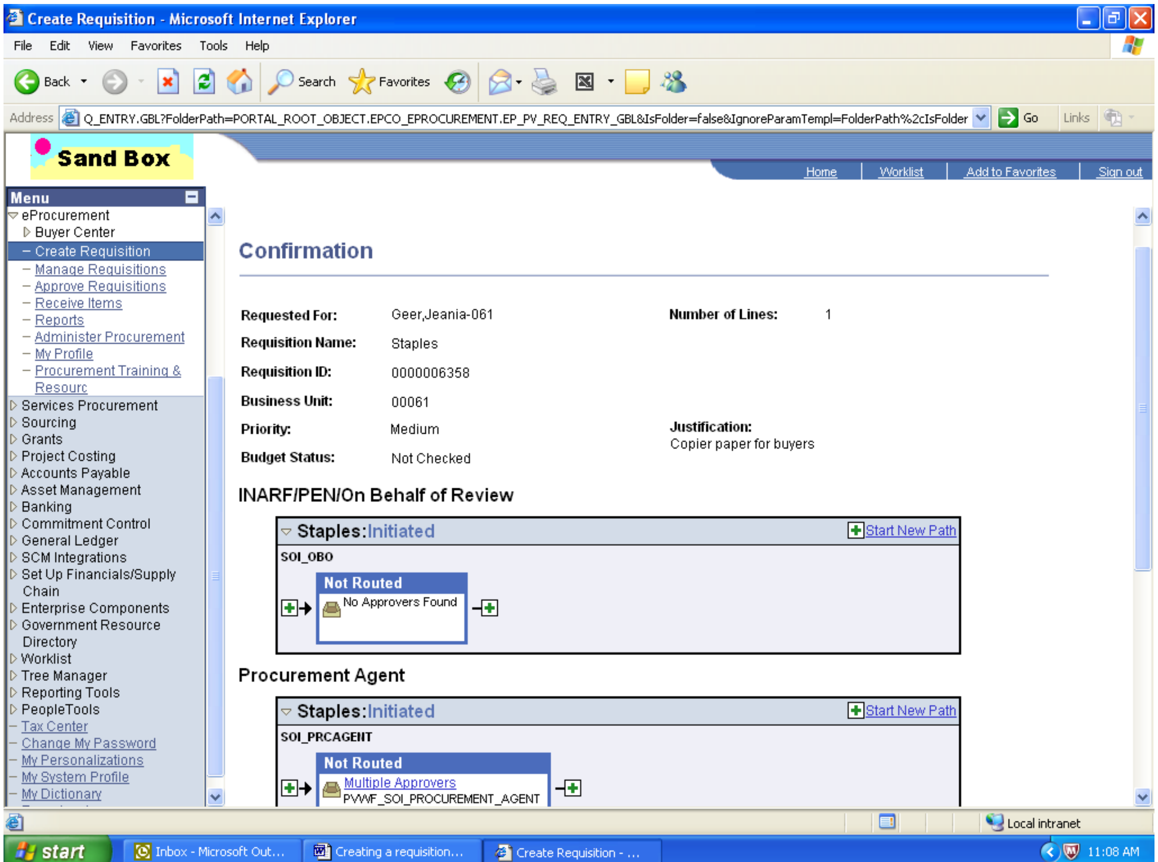
25. Cancel requisition

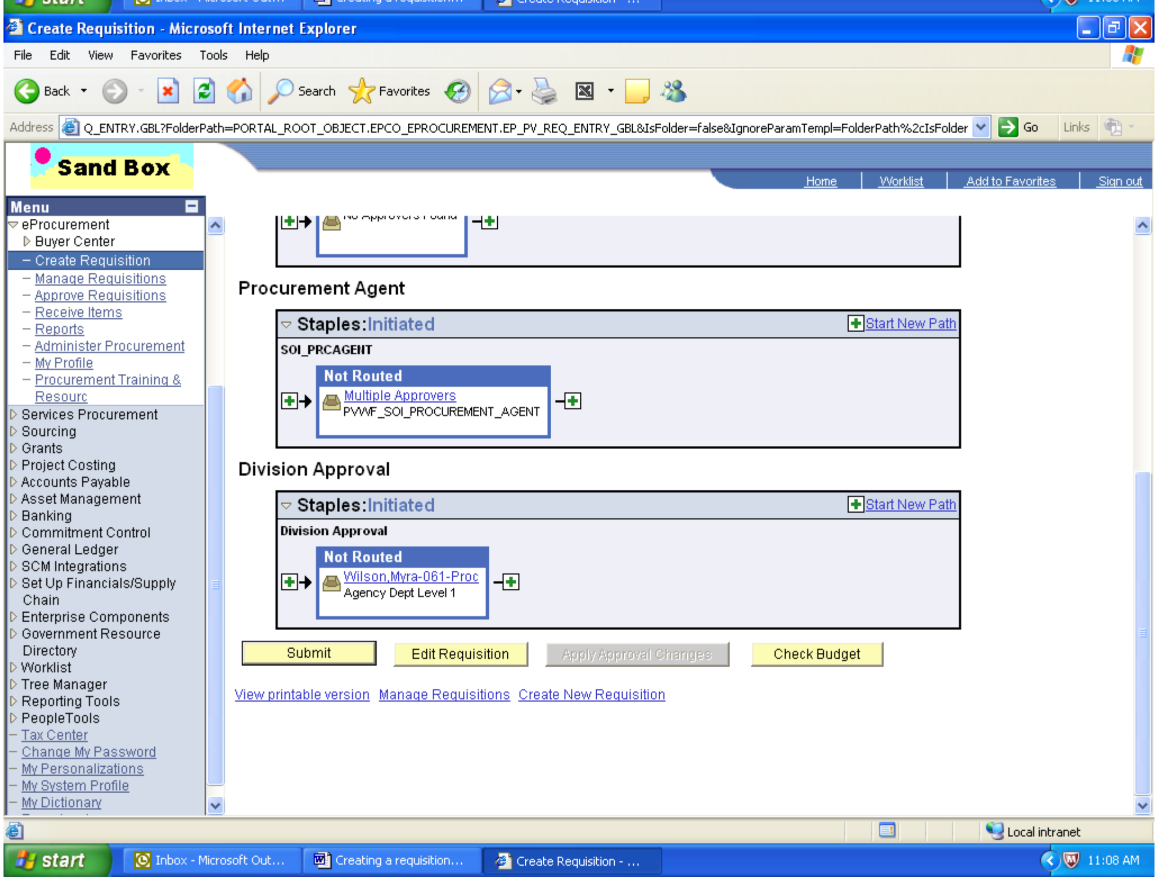
Clicking the Cancel requisition button before saving or submitting will remove the information about the requisition being created from the system. If you have saved the requisition, you will only cancel the changes to the requisition if there are any. To cancel the requisition if previously saved, you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

26. 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, if the requisition has been budget checked and to see a preview of who is in the approval workflow.

From this screen you can submit the requisition to the approval workflow, edit the requisition if necessary, or budget check the requisition if you want.


Create Requisition - Microsoft Internet Explorer
Sand Box
Home | Worklist | Add to Favorites | Sign out
Menu
eProcurement
Buyer Center
Create Requisition
Manage Requisitions
Approve Requisitions
Receive Items
Reports
Administer Procurement
My Profile
Procurement Training & Resourc
Confirmation
Requested For: Geer,Jeania-061
Number of Lines: 1
Requisition Name: Staples
Requisition ID: 0000006358
Business Unit: 00061
Priority: Medium
Justification:
Copier paper for buyers
Budget Status: Not Checked
INARF/PEN/On Behalf of Review
Staples:Initiated
Start New Path
SOI_OBO
Not Routed
No Approvers Found
Procurement Agent
Staples:Initiated
Start New Path
SOI_PRCAGENT
Not Routed
Multiple Approvers
PVWF_SOI_PROCUREMENT_AGENT
Local intranet
start
11:08 AM


Create Requisition - Microsoft Internet Explorer
Sand Box
Home | Worklist | Add to Favorites | Sign out
Procurement Agent
Staples:Initiated
Start New Path
SOI_PRCAGENT
Not Routed
Multiple Approvers
PVWF_SOI_PROCUREMENT_AGENT
Division Approval
Staples:Initiated
Start New Path
Division Approval
Not Routed
Wilson,Myra-061-Proc
Agency Dept Level 1
Submit
Edit Requisition
Apply Approval Changes
Check Budget
View printable version
Manage Requisitions
Create New Requisition
Local intranet
start
11:08 AM

27. 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 Requisitions

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

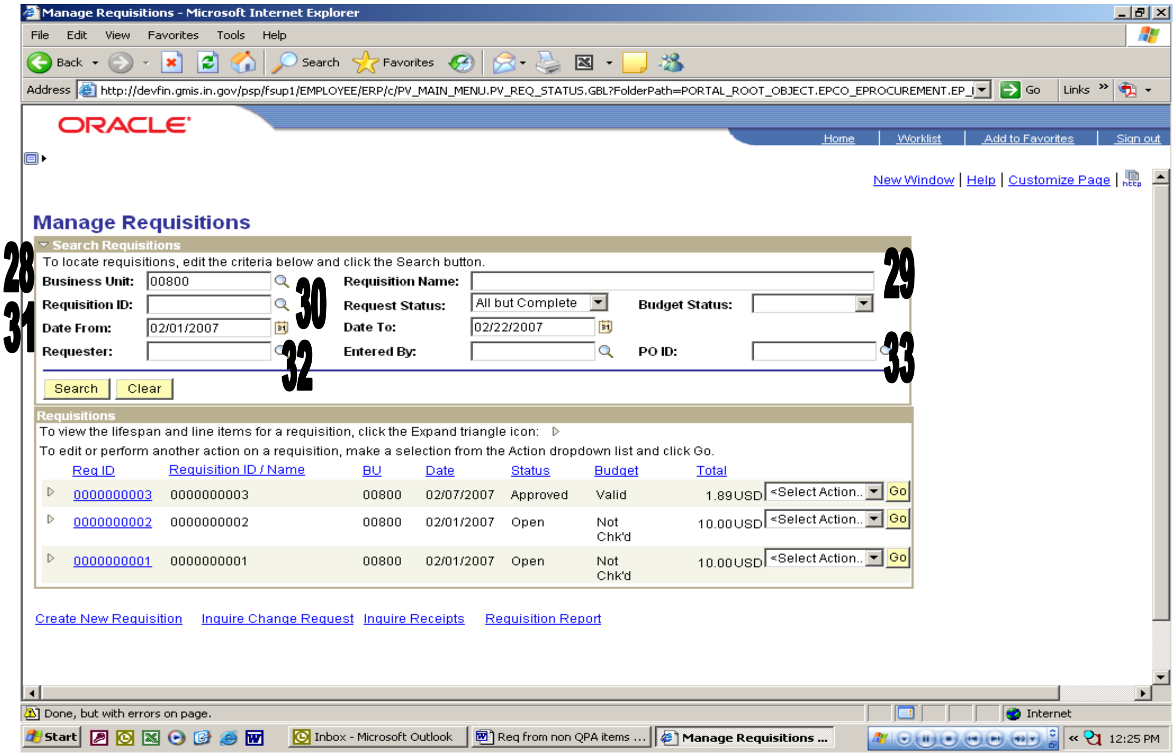
Menu Navigation:

- **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:

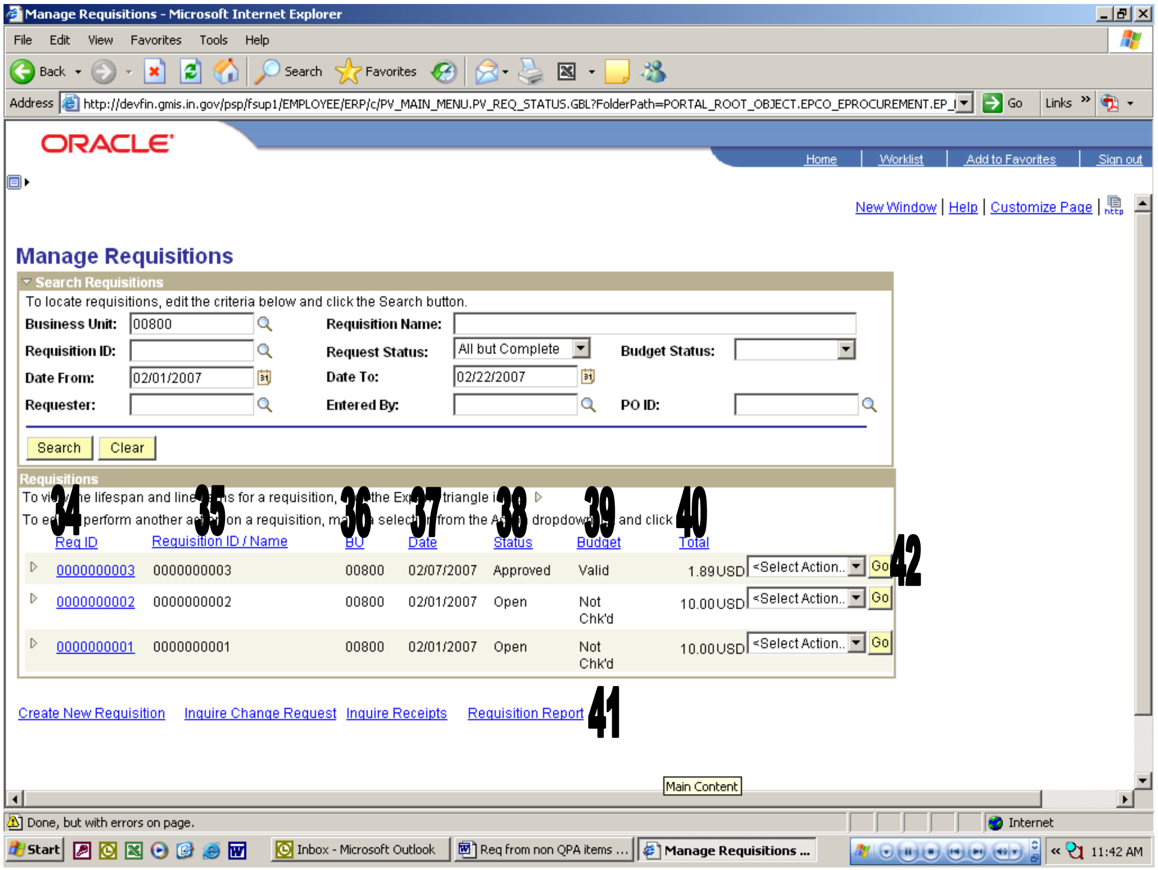
28. Business Unit
29. Requisition Name
30. Requisition ID
31. Date range
32. Requestor
33. PO ID



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:

34. Req ID
35. Requisition ID/Name
36. BU (Business unit)
37. Date
38. Status
39. Budget
40. Total
41. Requisition report
42. Additional actions that can be completed on requisition

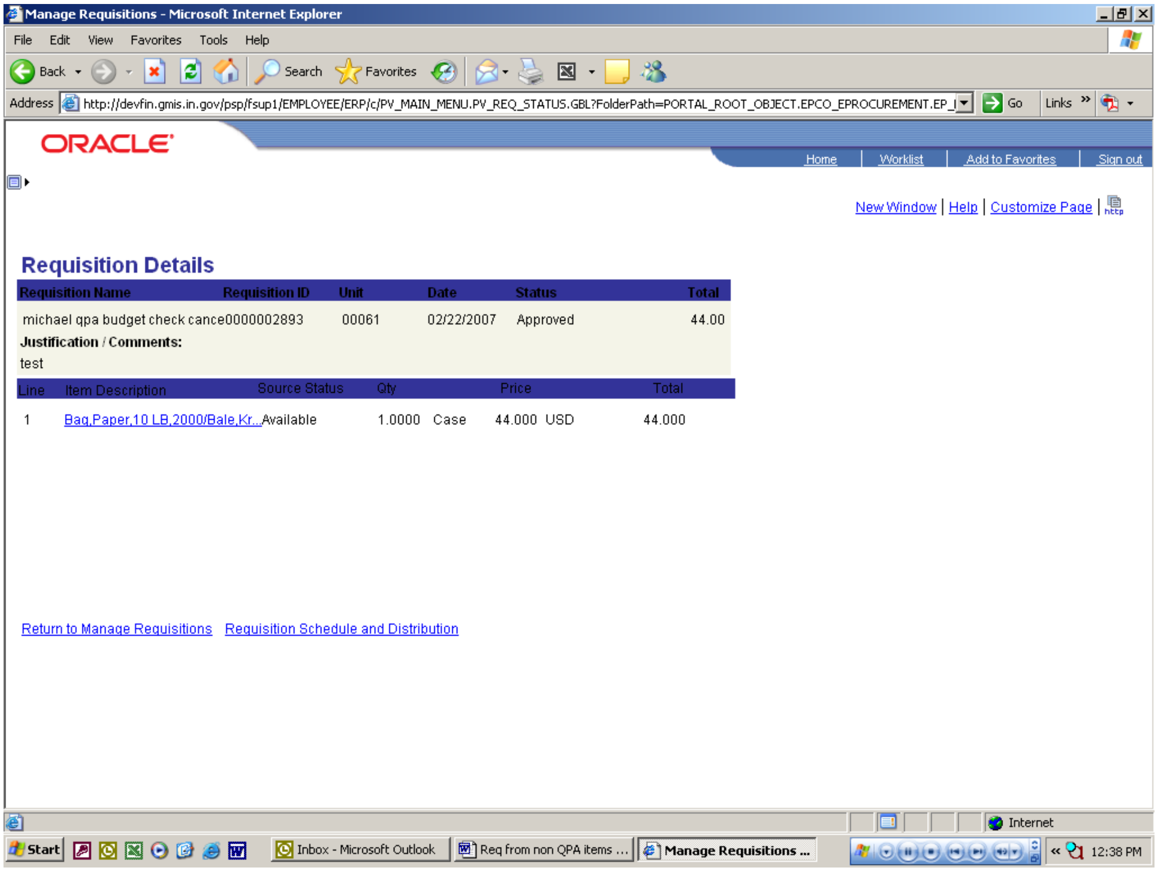
Clicking on the blue names for fields 34 to 40 will resort the columns.



Manage Requisitions - Microsoft Internet Explorer
ORACLE
Home | Worklist | Add to Favorites | Sign out
New Window | Help | Customize Page
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:
Search
Clear
Requisitions
34
35
36
37
38
39
40
42
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
41

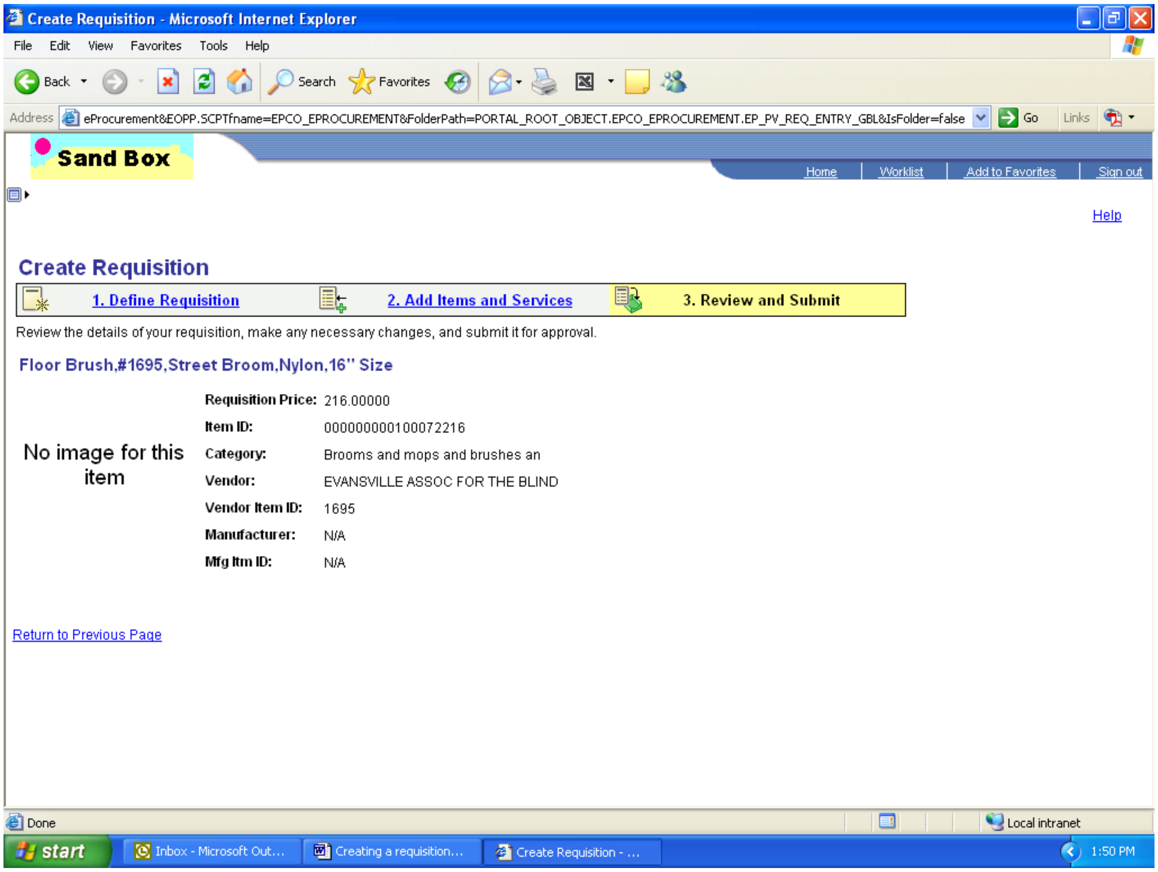
34. Req ID

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.

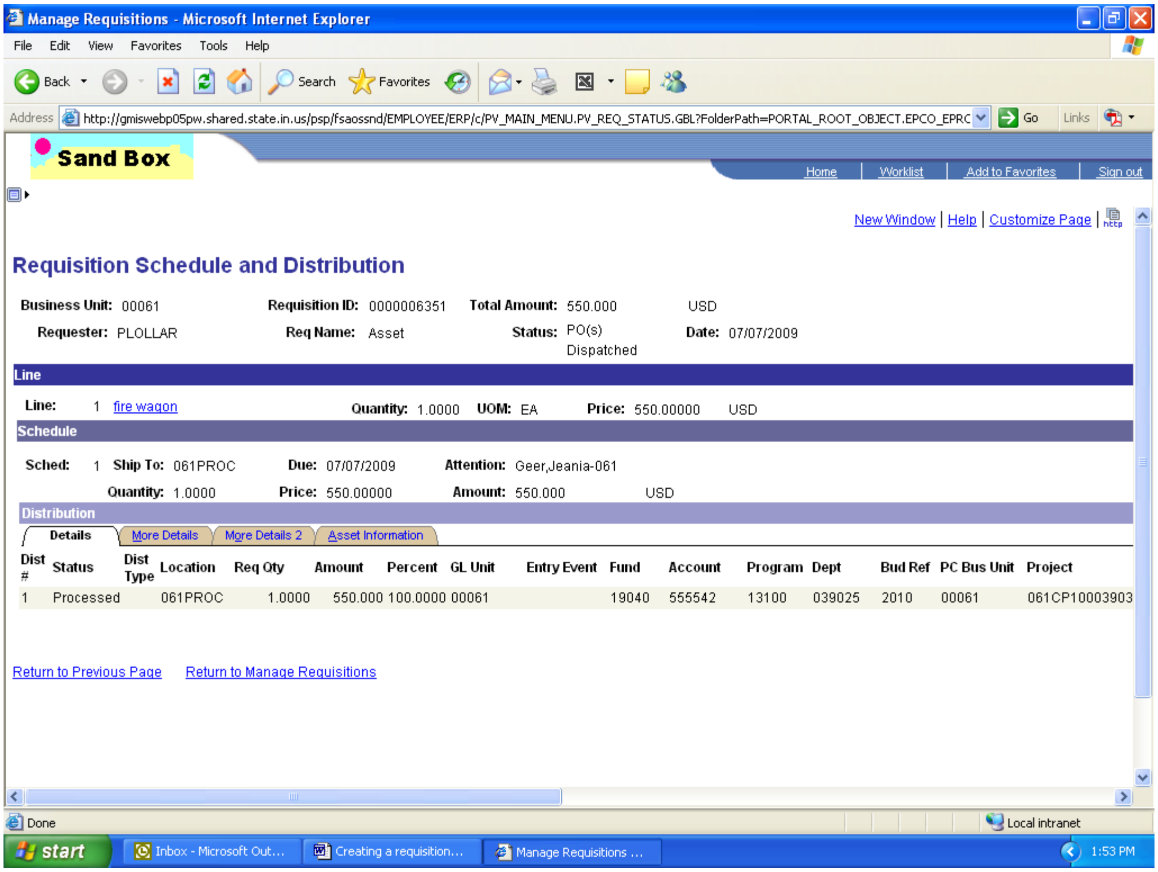


From the requisition details screen you can also view details about the line items and the schedule and distribution for the requisition lines. To review the detailed information click the blue link to review. The following screens show more detail as to what will be seen.

Item Description Screen



Requisition Schedule and Distribution Screen



35. Requisition ID/ Name

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

36. BU (business unit)

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

37. Date

This is the date the requisition was created and saved.

38. Status

This column shows the status of the requisition. Statuses of Approved, Open (not submitted to workflow), Cancelled, Pending, PO(s) Created, Partially Received and Received will be seen. In order to finish processing a requisition, the status must be in Approved status.

39. 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, the budget status must be Valid.

40. Total

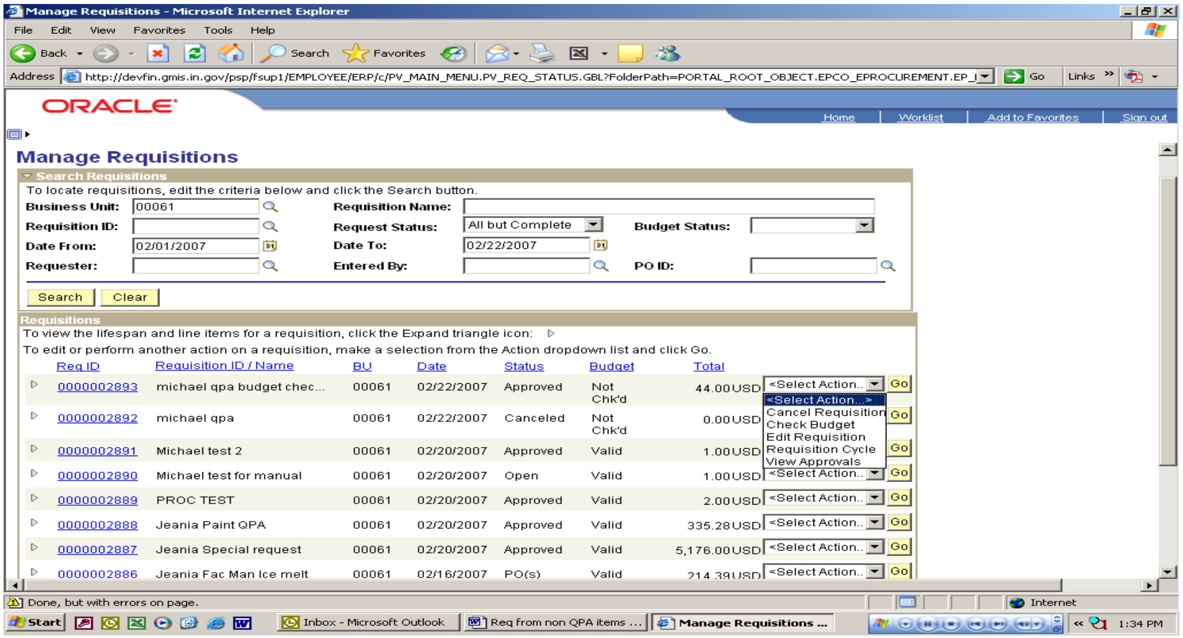
This column shows the total dollar amount for the requisition. This generally is an estimate of the final purchase amount unless it is a requisition created from items found in the search catalog.

41. 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.

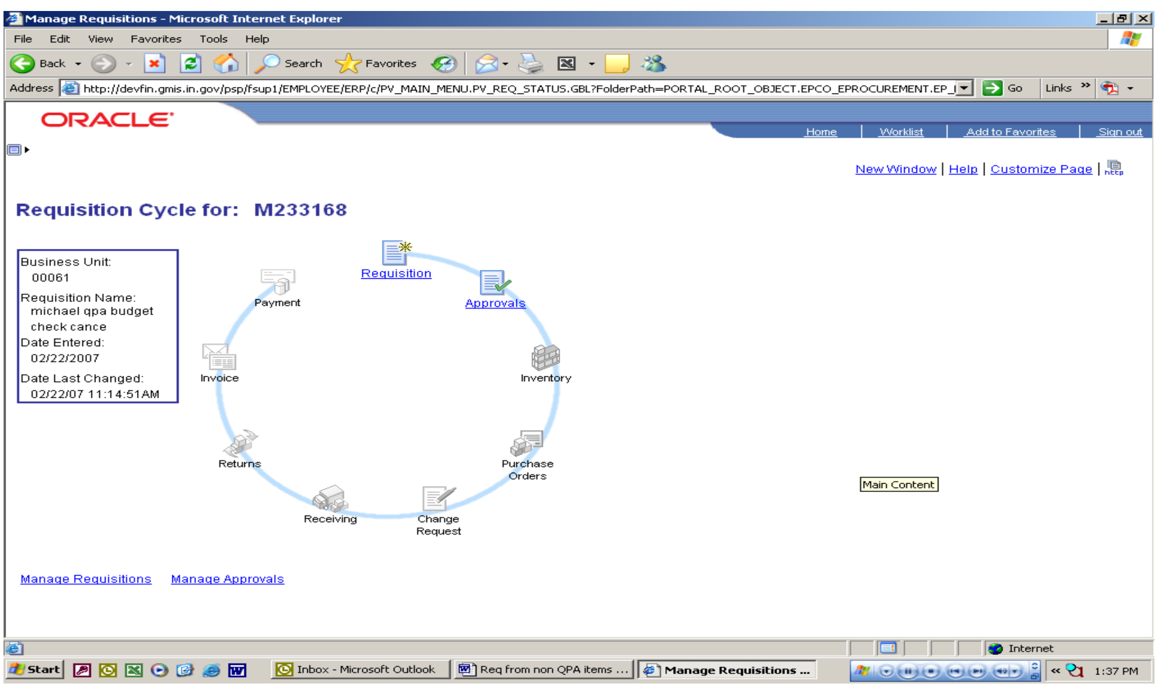
42. Additional actions that can be completed on requisition

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.



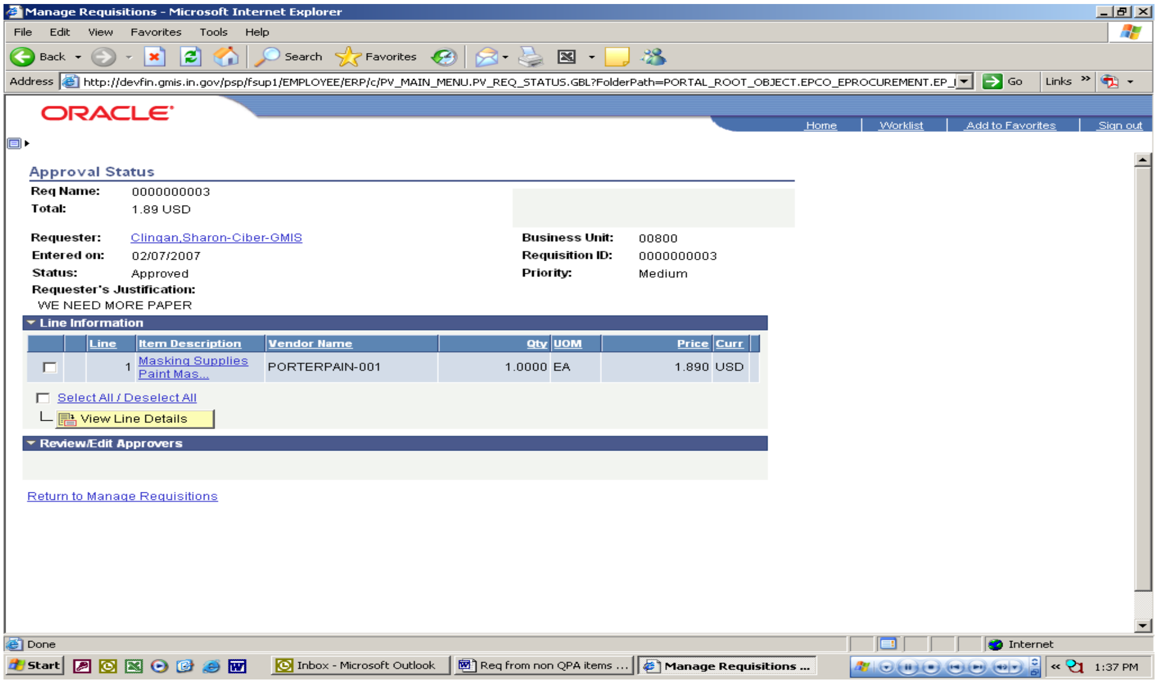
Requisition Cycle

The user can access and review from the Manage Requisition screen where in the life cycle of a requisition the current requisition is. The Requisition Cycle screen is shown below.

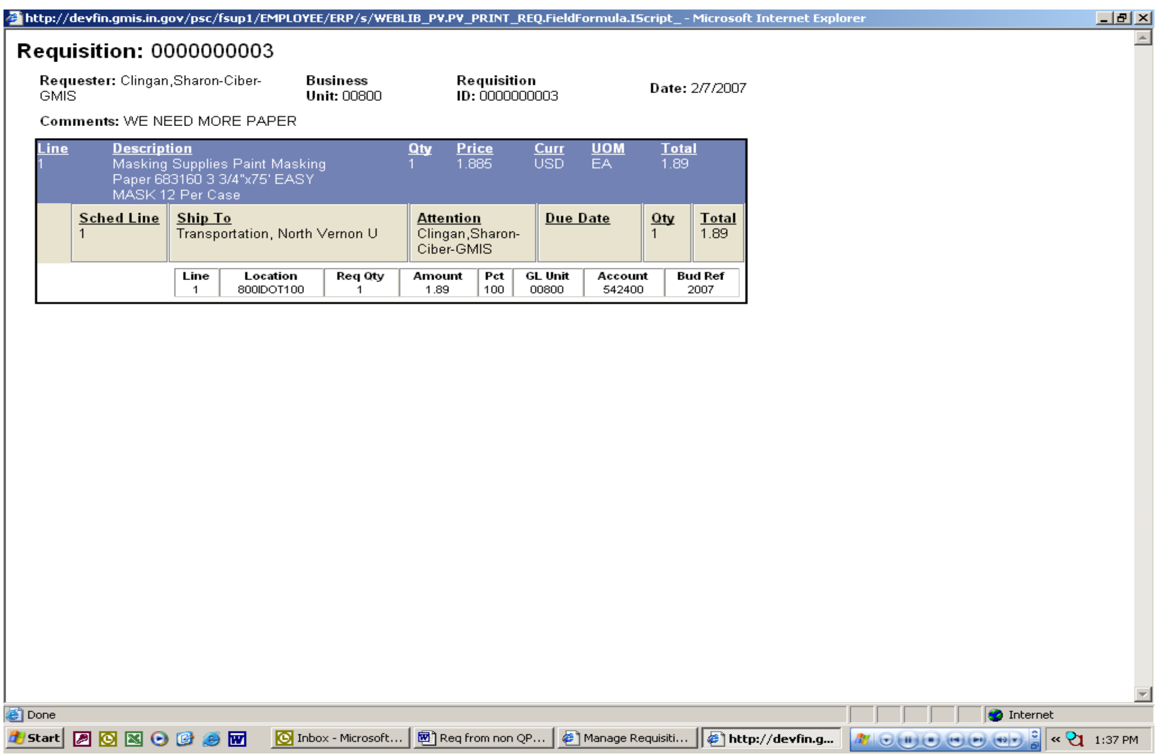


View Approvals

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.



Line Detail Screen



Budget Check

By 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.

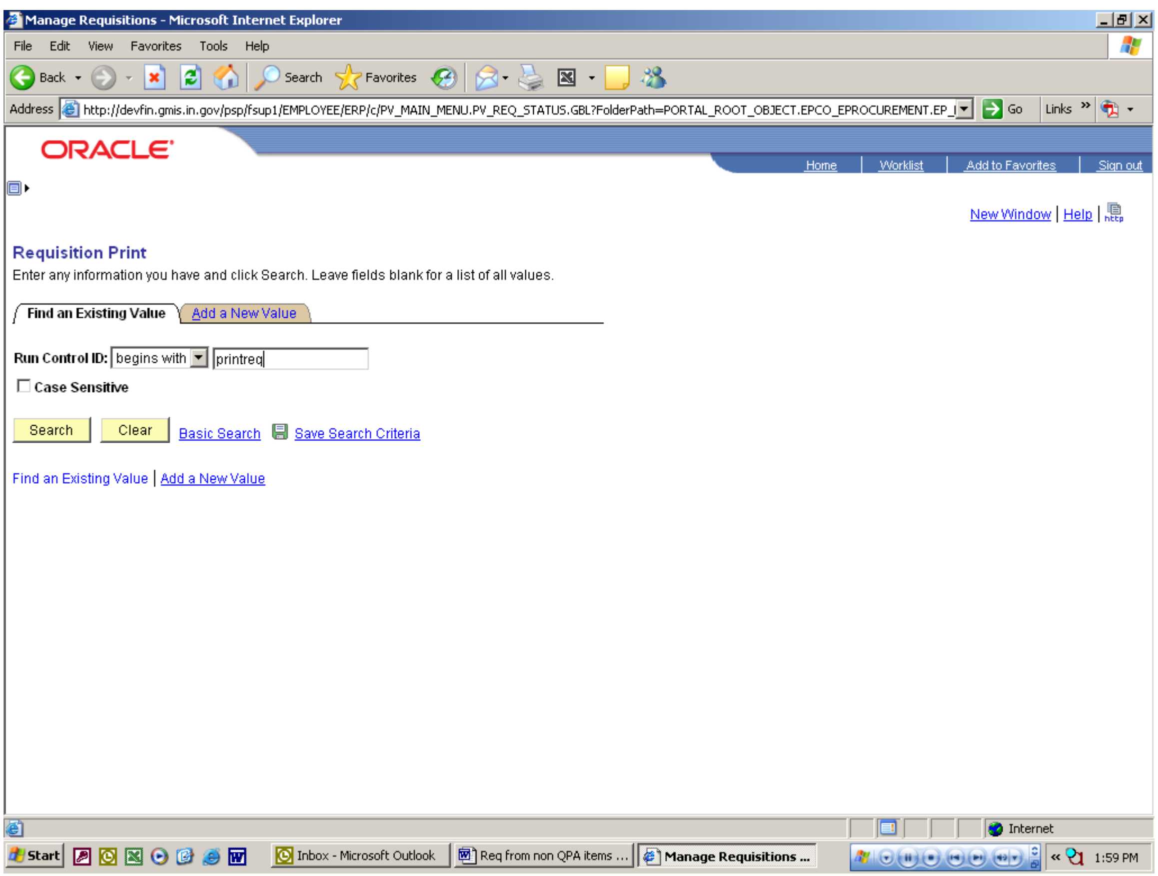
NOTE: A requisition must be in Approved Status and have a valid Budget Check before it can be used in either the RFQ or Purchase Order processes.

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.

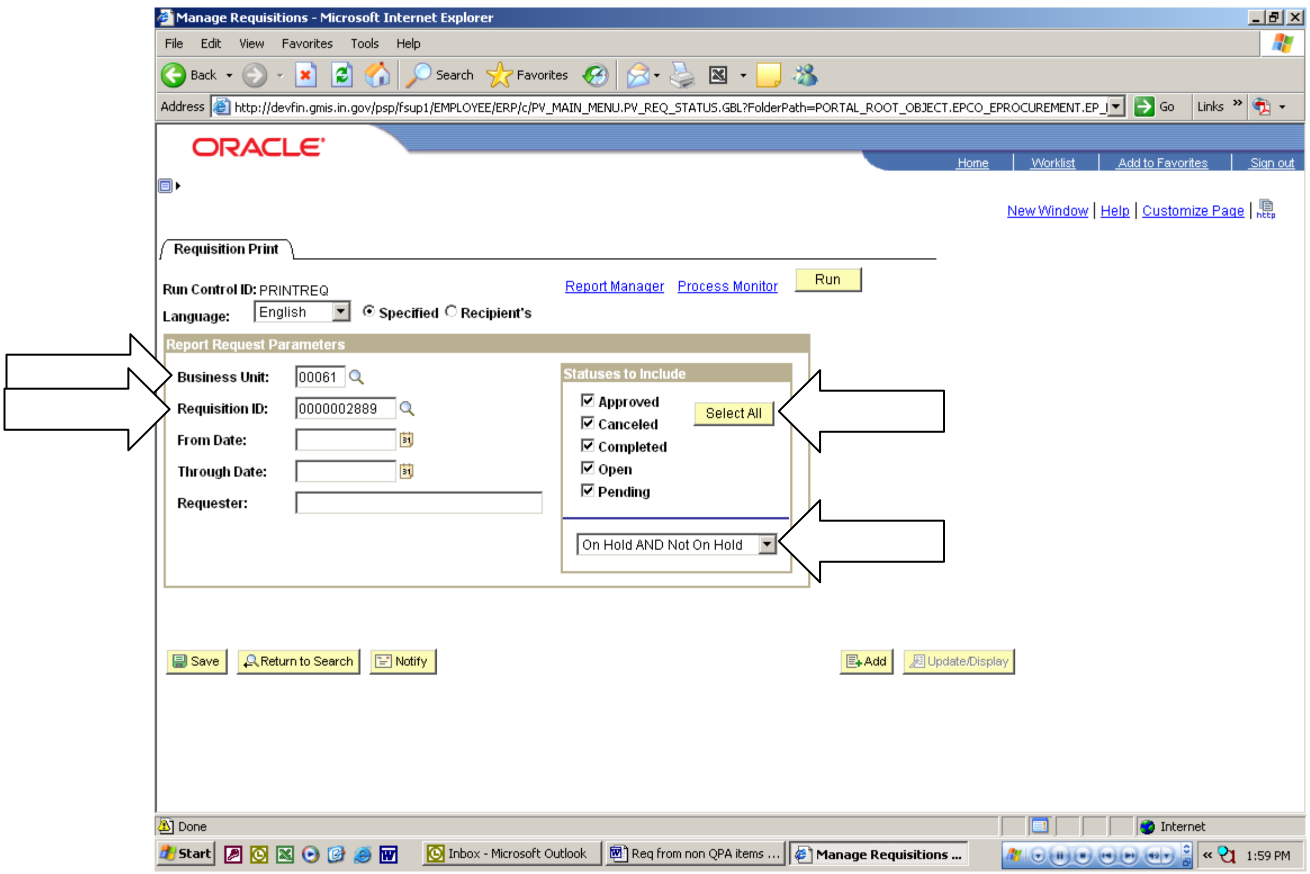


After creating or searching for an existing Run Control ID you will be taken to the following screen. At this screen you will enter your search criteria to find the requisition of which to create a PDF.

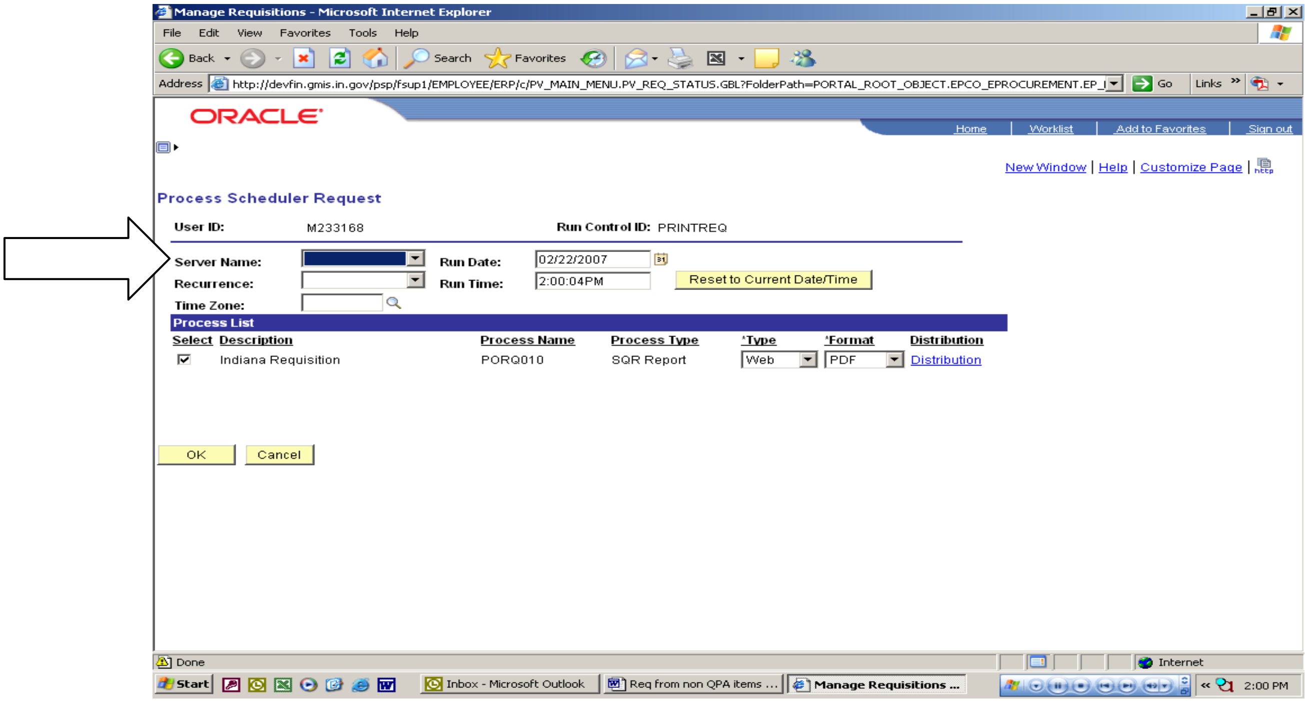
On this screen you will need to enter the five digit Business Unit number and the ten digit Requisition ID in the corresponding boxes.

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.

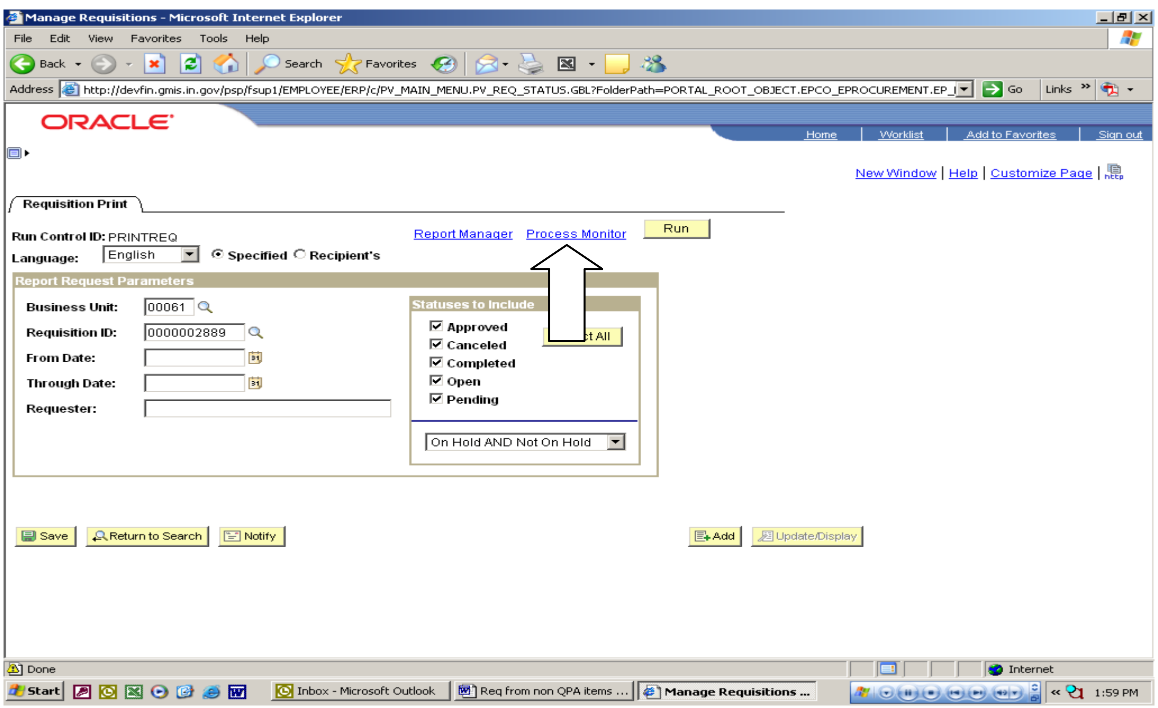
To continue the processing click the Run button. This will take you to a new screen.



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.

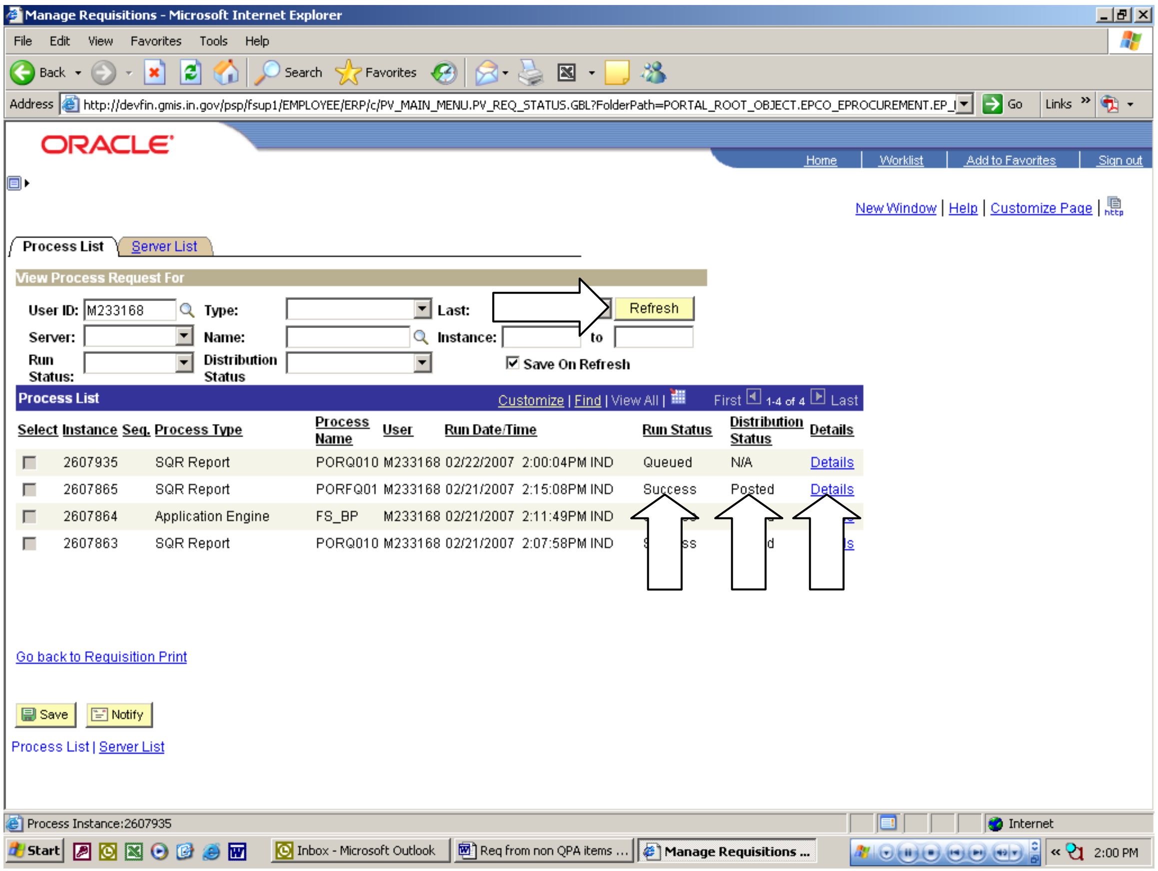


After clicking the OK button you will be taken back to the Requisition Print screen. Once here click the Process Monitor link.

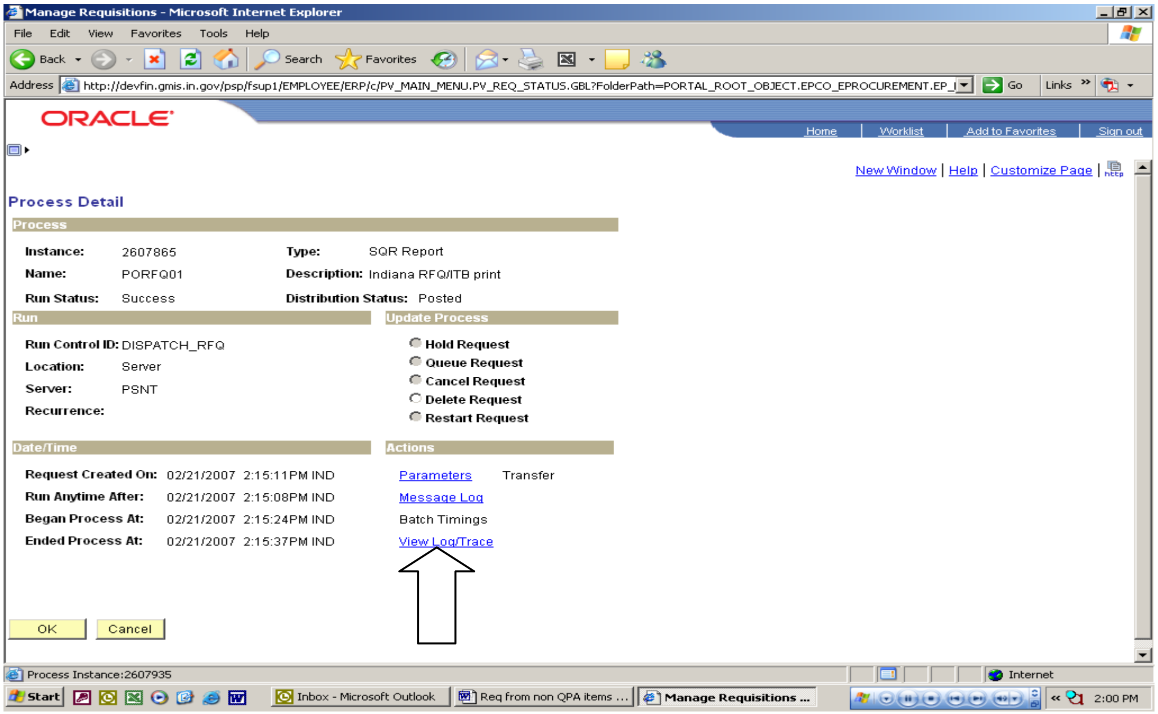


After clicking the Process Monitor link the following screen will allow the PDF creation process to be monitored and to be able to access and print a copy of the requisition PDF. At this screen your process will be the top line listed. You want the Run Status column to be Success and the Distribution 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.

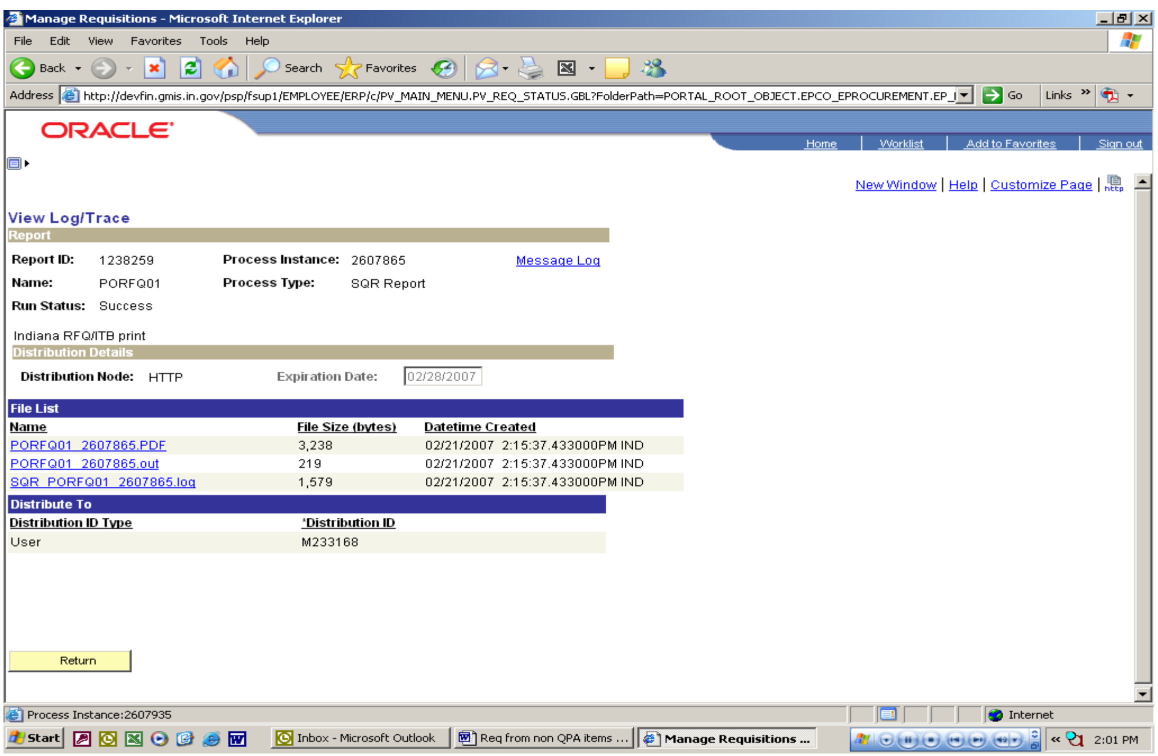
Once all statuses are what they need to be, then click the Details link to be taken to the next screen.



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. 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.



If your requisition is under your streamline delegation, see the user guide titled: Expediting Requisition to PO. Otherwise send completed requisition to IDOA Procurement to complete the process.