

CREATING A REQUISITION 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.

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-061

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

Location	GL Unit	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Subc
061PRO	00061			10000	039000	2010						

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)

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: 1 [00061] Department of Administration

Requester: [J005563] Geer, Jeania- 2

Requisition Name: [] 3 **Priority:** Medium

Line Defaults 4

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

Chartfields **Details** **Asset Information** **EST**

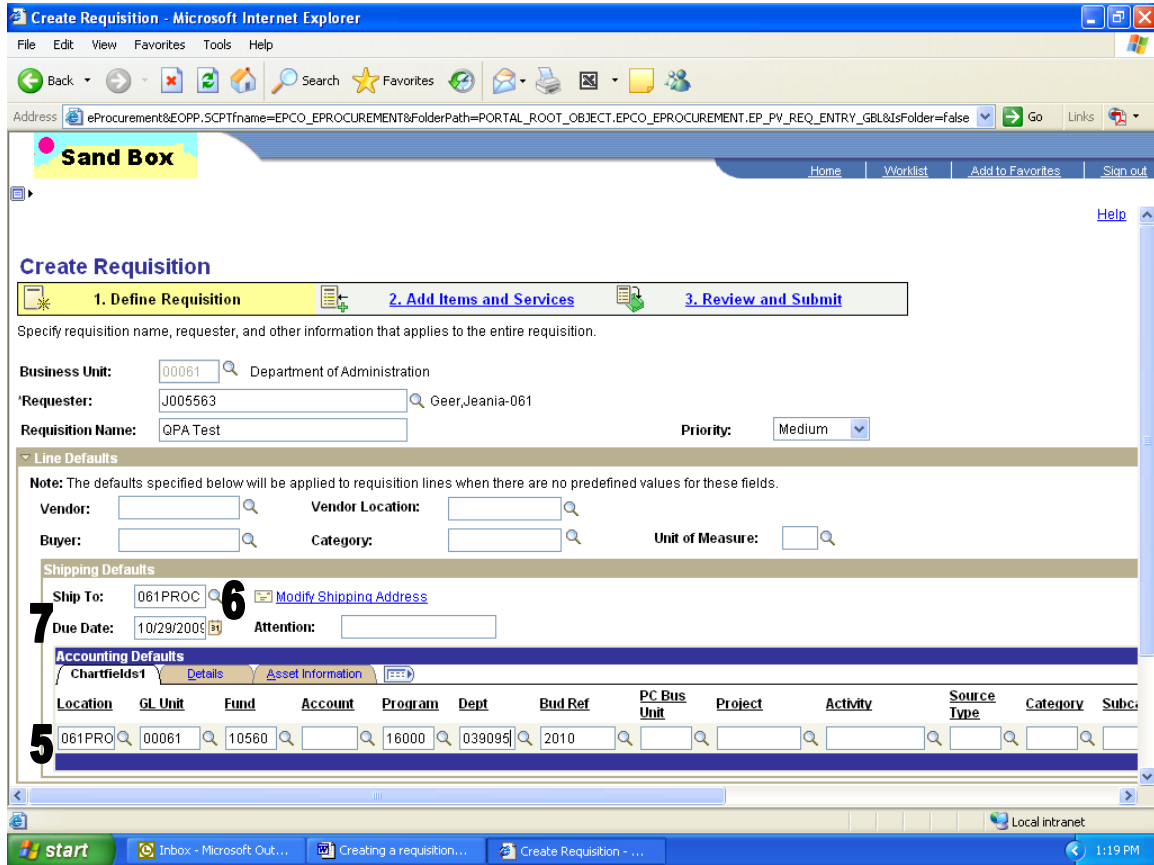
Location	GL Unit	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Subc
061PRO	00061	[]	[]	10000	039000	2010	[]	[]	[]	[]	[]	[]

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.

Look Up Ship To

SetID: STIND

Ship To Location: begins with

Description: begins with

[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 1-100 of 300

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

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.

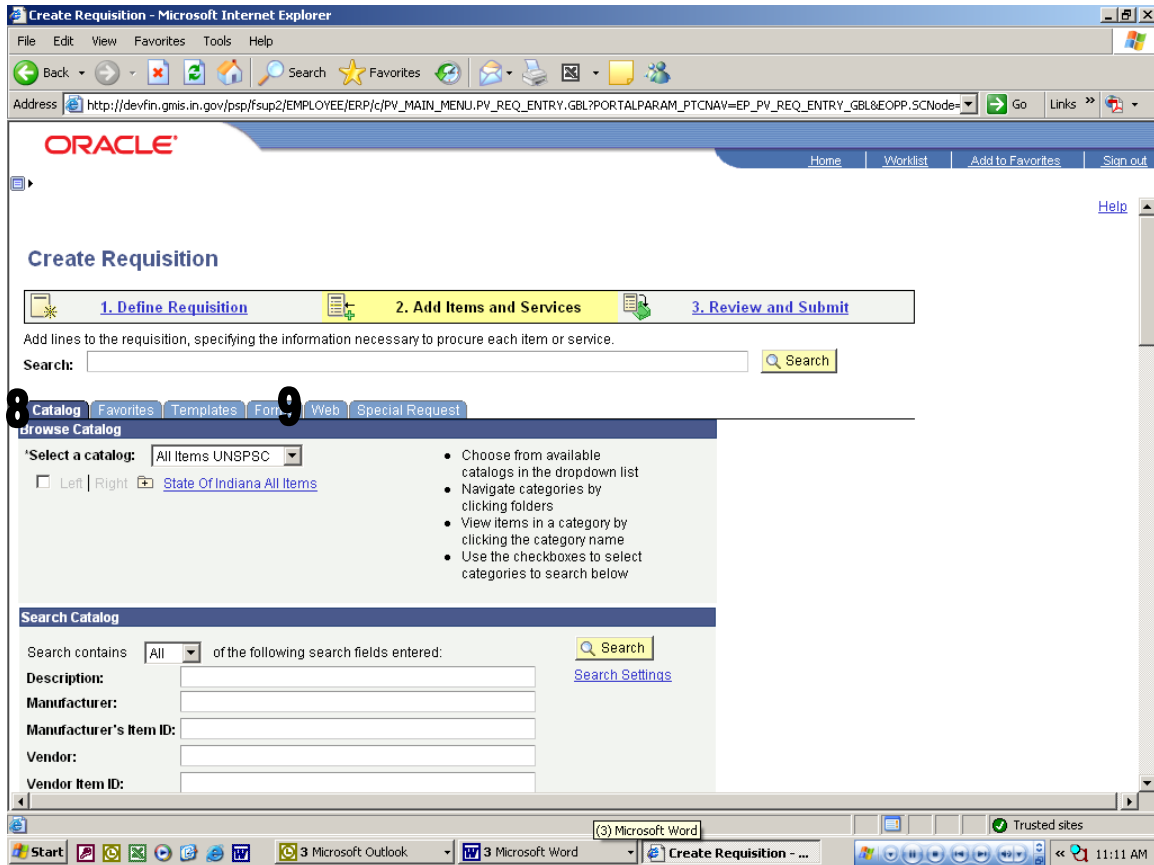
Once all items 1 through 7 have been entered click the yellow Continue button or the Add Items/Services tab to pick the items from the PeopleSoft catalog (QPA items) or the vendor punch-out catalog to be purchased from.

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.

The screenshot displays the Oracle 'Create Requisition' web application in Microsoft Internet Explorer. The browser's address bar shows the URL: `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=`. The page features the Oracle logo and navigation links for Home, Worklist, Add to Favorites, and Sign out. A 'Help' link is also present in the top right corner.

The main heading is 'Create Requisition', followed by a progress bar with three steps: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. Below this, a search bar is labeled 'Search:' with a 'Search' button. A navigation menu includes 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Catalog' tab is active, leading to the 'Browse Catalog' section.

In the 'Browse Catalog' section, a dropdown menu for 'Select a catalog:' is open, showing 'All Items UNSPSC' as the selected option. Other visible options include 'BUILDING SUPPLIES', 'COMMUNICATION SUPPLIES', 'COPY & FORMS PAPER', 'DATA PROCESSING', 'EDUCATIONAL ITEMS', 'ELECTRICAL SUPPLIES', 'FARM, ANIMAL & NURSERY', 'FOOD ITEMS', 'FURNITURE & APPLIANCES', and 'HARDWARE & TOOLS'. To the right of the dropdown, a list of instructions is provided:

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

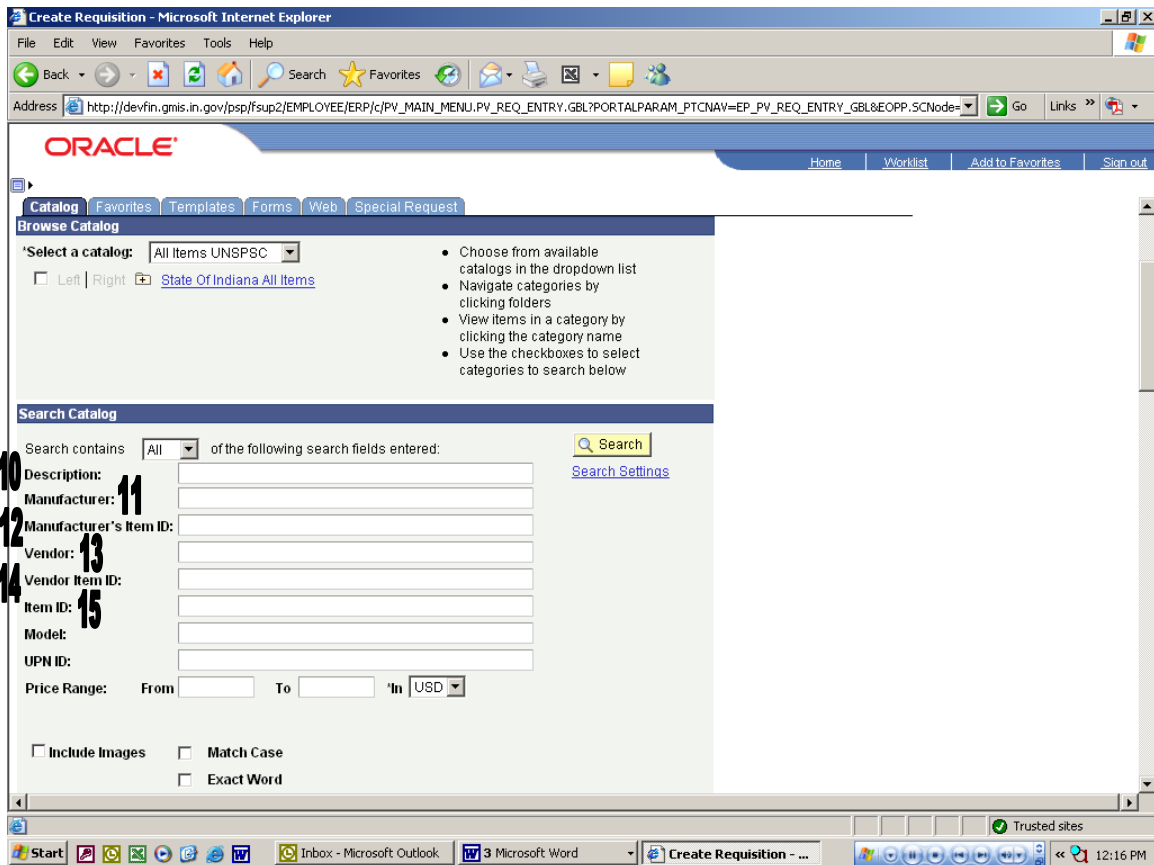
Below the dropdown is a 'Search Catalog' section with a 'Search contains' dropdown (set to 'HARDWARE & TOOLS') and a 'Search' button. There are also input fields for 'Description:', 'Manufacturer:', 'Manufacturer's Item ID:', 'Vendor:', and 'Vendor Item ID:'. A 'Search Settings' link is located below the search button.

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 10:52 AM. A white arrow points from the left side of the page to the 'Select a catalog:' dropdown menu.

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".

Oracle
Home Worklist Add to Favorites Sign out

Catalog Favorites Templates Forms Web Special Request

Browse Catalog

Select a catalog: All Items UNSPSC

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

Search Catalog

Search contains: All of the following search fields entered:

Description: *paper* and *towel*

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

Model:

UPN ID:

Price Range: From To 'In USD

Include Images Match Case

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.

Sort Items: Show Items from: All Vendors

Item Description	Vendor	Mfg Name	Price	Curr	UOM	Quantity
C-Fold Natural Paper Towel 2400/Case, Size 10.25"x13", Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000
C-Fold Natural Paper Towel 2400/Case, Size 10.25"x13", Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000
Dispenser, Towel, Touchless Roll, dispenses towel size 10" x 13" A	GEORGIA PACIFIC	GEORGIA PACIFIC	30.420	USD	Each	1.000
Dispenser, Towel, Touchless Roll, dispenses towel size 10" x 13" A	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	30.420	USD	Case	1.000
Kit Spill Universal Precaution 2-paper towels 1 pair latex			6.000	USD	Each	1.000
Towel, Paper, C-Fold, White, Case Pack, 2400/ea, Open Sheet Size 1	GEORGIA PACIFIC	GEORGIA PACIFIC	12.290	USD	Package	1.000
Towel, Paper, C-Fold, White, Case Pack, 2400/ea, Open Sheet Size 1	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	12.290	USD	Case	1.000
Towel, Paper, C-Fold, White, Open sheet size 10.25"x13"			9.800	USD	Case	1.000
Towel, Paper, Multi-Fold, Natural, Open Minimum Sheet Size 9.13"	SCA TISSUE NORTH AMERICA LLC	SCA TISSUE NORTH AMERICA LLC	11.950	USD	Package	1.000
Towel, Paper, Multi-Fold, Natural, Open Minimum Sheet Size 9.13"	ACORN DISTRIBUTORS INC	SCA TISSUE NORTH AMERICA LLC	11.950	USD	Case	1.000

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

The screenshot shows the Oracle Create Requisition interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a search bar shows '27 Results'. The 'Sort Items' section has a dropdown for 'Item Description' and a filter for 'All Vendors'. The main table lists various paper towel items with their respective vendors and prices. The 'Details' tab is active, showing the following data:

Item Description	Vendor	Mfg Name	Price	Curr	UOM	Quantity
<input type="checkbox"/> C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000
<input type="checkbox"/> C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000
<input type="checkbox"/> Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8" A		GEORGIA PACIFIC	30.420	USD	Each	1.000
<input type="checkbox"/> Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8" A	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	30.420	USD	Case	1.000
<input type="checkbox"/> Kit Spill Universal Precaution 2-paper towels 1 pair latex			6.000	USD	Each	1.000
<input type="checkbox"/> Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1		GEORGIA PACIFIC	12.290	USD	Package	1.000
<input type="checkbox"/> Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	12.290	USD	Case	1.000
<input type="checkbox"/> Towel,Paper,C-Fold,White,Open sheet size,10.25"x13"			9.800	USD	Case	1.000
<input type="checkbox"/> Towel,Paper,Multi Fold,Natural,Open Minimum Sheet Size 9.13"		SCA TISSUE NORTH AMERICA LLC	11.950	USD	Package	1.000

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.

The screenshot shows the Oracle E-Business Suite interface for creating a requisition. The search results are displayed in a table with the following columns:

Description	Item ID	Vendor Item ID	Manufacturer ID	Mfg Item ID
Kit Spill Universal Precaution 2-paper towels 1 pair latex	00000000000000000001			
Towel,Paper,C-Fold,White,Open sheet size,10.25"x13"	18136			
Towel,Paper,Multi-Fold,White,Open sheet size,9.13"x9.5"	18137			
Towel,Paper,Multifold,Natural,Open Sheet Size,9.13"x9.5"	16834			
Towel,Paper,Perforated,Household use,Natural,processed chlor	000000000100003514			
Towel,Paper,Single Fold,Natural,Open sheet size,9.3"x10.75"	18138			
Universal Precaution Spill Kit with: 2 Paper Towels, 1 Pair L	000000000100012988	SPILL KIT	DWD	SPILL KIT
C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	000000000100024624		GEORGIA	GP21924
C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	000000000000024771		GEORGIA	21024
Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8",A	000000000100025423		GEORGIA	GP54086
Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8",A	000000000100003494	GP54086	GEORGIA	GP54086
Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size,1	000000000100026537		GEORGIA	N1222223

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.

The screenshot shows the Oracle 'Create Requisition' web application. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' links. Below this is a search results section titled '27 Results'. The search criteria are 'Show Items from: All Vendors' and 'Sort Items: Item Description'. A white arrow points to the 'Quantity' column in the table below.

Item Description	Vendor	Mfg Name	Price	Curr	UOM	Quantity
<input type="checkbox"/> C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000 <input type="text"/>
<input type="checkbox"/> C Fold Natural Paper Towel 2400/Case,Size 10.25"x13",Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000 <input type="text"/>
<input type="checkbox"/> Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8" A		GEORGIA PACIFIC	30.420	USD	Each	1.000 <input type="text"/>
<input type="checkbox"/> Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8" A	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	30.420	USD	Case	1.000 <input type="text"/>
<input type="checkbox"/> Kit Spill Universal Precaution 2-paper towels 1 pair latex			6.000	USD	Each	1.000 <input type="text"/>
<input type="checkbox"/> Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1		GEORGIA PACIFIC	12.290	USD	Package	1.000 <input type="text"/>
<input type="checkbox"/> Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	12.290	USD	Case	1.000 <input type="text"/>
<input type="checkbox"/> Towel,Paper,C-Fold,White,Open sheet size,10.25"x13"			9.800	USD	Case	1.000 <input type="text"/>
<input type="checkbox"/> Towel,Paper,Multi Fold,Natural,Open Minimum Sheet Size 9.13"		SCA TISSUE NORTH AMERICA LLC	11.950	USD	Package	1.000 <input type="text"/>

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 screenshot displays the Oracle eProcurement 'Create Requisition' interface. The main area shows a table of items with columns for Item Description, Vendor, Mfg Name, Price, Curr, UOM, and Quantity. Each row has a yellow 'Add' button. A white arrow points to the 'Add' button for the first item. On the left, a 'Requisition Summary' box shows 'C Fold Natural Paper 1 CS Towel...' with 'Total Lines: 1' and 'Total Amount (USD): 13.270'. Another white arrow points to this summary box.

Item Description	Vendor	Mfg Name	Price	Curr	UOM	Quantity	Action
C Fold Natural Paper Towel 2400/Case,Size 10.25"x13" Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000	Add
C Fold Natural Paper Towel 2400/Case,Size 10.25"x13" Open Sh	HP PRODUCTS INC	GEORGIA PACIFIC	13.270	USD	Case	1.000	Add
Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8",A		GEORGIA PACIFIC	30.420	USD	Each	1.000	Add
Dispenser,Towel,Touchless Roll,dispenses towel size,10"x8",A	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	30.420	USD	Case	1.000	Add
Kit Spill Universal Precaution 2-paper towels 1 pair latex			6.000	USD	Each	1.000	Add
Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1		GEORGIA PACIFIC	12.290	USD	Package	1.000	Add
Towel,Paper,C-Fold,White,Case Pack,2400/ea,Open Sheet Size 1	ACORN DISTRIBUTORS INC	GEORGIA PACIFIC	12.290	USD	Case	1.000	Add
Towel,Paper,C-Fold,White,Open sheet size,10.25"x13"			9.800	USD	Case	1.000	Add
Towel,Paper,Multi Fold,Natural,Open Minimum Sheet Size 9.13"		SCA TISSUE NORTH AMERICA LLC	11.950	USD	Package	1.000	Add
Towel,Paper,Multi Fold,Natural,Open Minimum Sheet Size 9.13"	ACORN DISTRIBUTORS INC	SCA TISSUE NORTH AMERICA LLC	11.950	USD	Case	1.000	Add

Requisition Summary
 Description Qty UOM
 C Fold Natural Paper 1 CS Towel...
 Total Lines: 1
 Total Amount (USD): 13.270

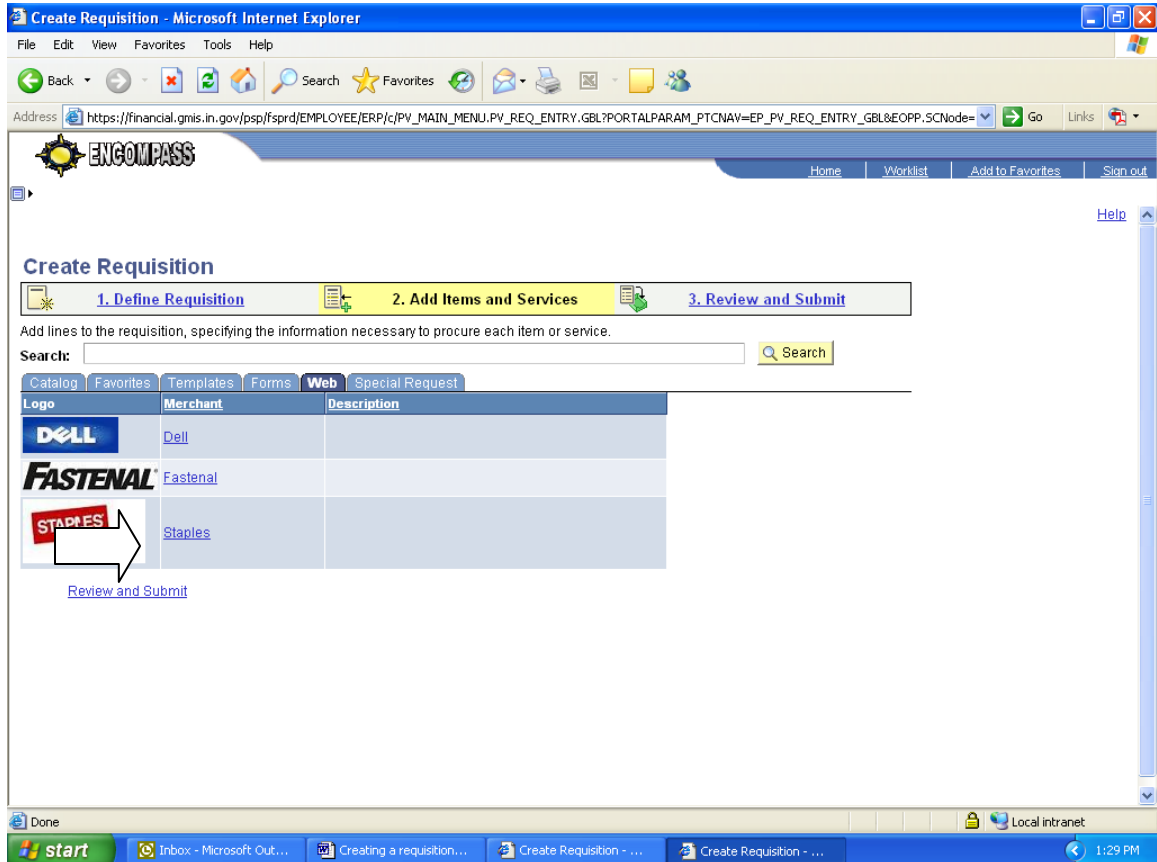
The summary shows the item description, the UOM, the item quantity, the total lines (requisition lines) and the total amount of the requisition.

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

ORACLE

Home | Worklist | Add to Favorites | Sign out

Create Requisition

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: M233168 Sturm,Michael-061-Proc
Requisition Name: PROC TEST **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Test item for training guide		1.0000	Each	1.000	1.000

Requisition Lines

Select All / Deselect All

Add to favorites | Modify Line / Shipping / Accounting | Delete

'Requisition Type: Small Purchase

Justification/Comments

Justification comments placed here on why you need this item

Send to Vendor | Show at Receipt | Show at Voucher

Check Budget

Save as Template

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

Start | Inbox - Microsoft Outlook | Create Requisition - ... | Document1 - Microsoft ... | 12:31 PM

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.

Line	Description	Quantity	Unit	USD
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

Add Attachment

OK **Cancel**

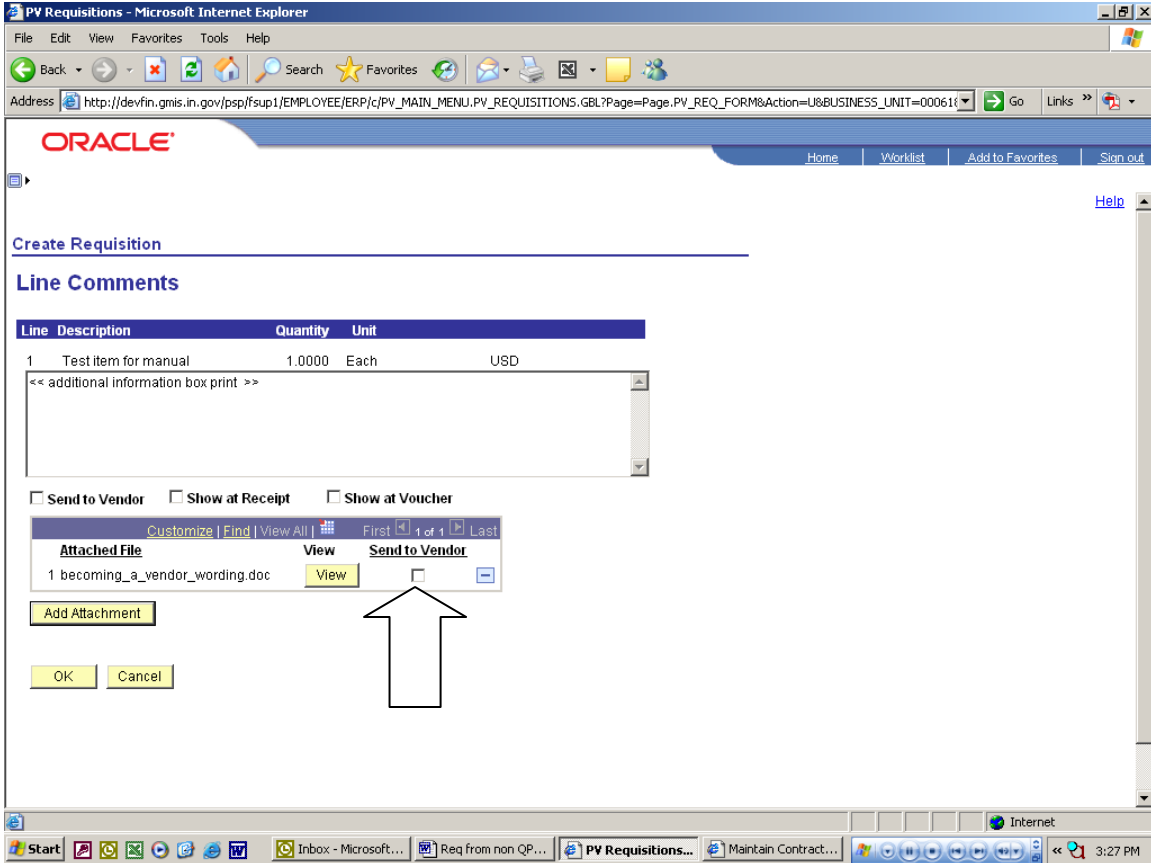
If you need to add attachments to the requisition

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.

Browse...

Upload **Cancel**

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 screenshot shows a web browser window titled "Create Requisition - Microsoft Internet Explorer". The address bar displays the URL: https://financial.gmis.in.gov/psp/fstrn/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT.EP_PV_REQ_ENT. The page content includes a search form with the following fields:

- Search contains: All of the following search fields entered:
- Description: [Empty]
- Manufacturer: [Empty]
- Manufacturer's Item ID: [Empty]
- Vendor: [Empty]
- Vendor Item ID: [Empty]
- Item ID: *29009
- Model: [Empty]
- UPN ID: [Empty]
- Price Range: From [Empty] To [Empty] 'In USD

Below the search form, there are checkboxes for "Include Images", "Match Case", and "Exact Word". The search results section shows "1 Results" and a table with the following data:

Item Description	Vendor	Mfg Name	Price	Curr	UOM	Quantity	Description	Item ID	Vendor Item ID
5 ft. contour pedestal park bench. Five foot bench features	PEN PRODUCTS	PEN PRODUCTS	383.000	USD	Each	1.000	5 ft. contour pedestal park bench. Five foot bench features	000000000000029009	P-3224-A

The browser's taskbar at the bottom shows the Start button, an open "Inbox - Microsoft Out...", and the current "Create Requisition - ..." window. The system clock indicates 11:28 AM.

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.

Training

Create Requisition

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: EPTRN50 EPro Training ID 50

Requisition Name: PEN Park Bench **Priority:** Medium

Description	Vendor Name	Quantity	UOM	Price	Total
pedestal park	PEN PRODUCTS	1.0000	Each	363.000	363.000

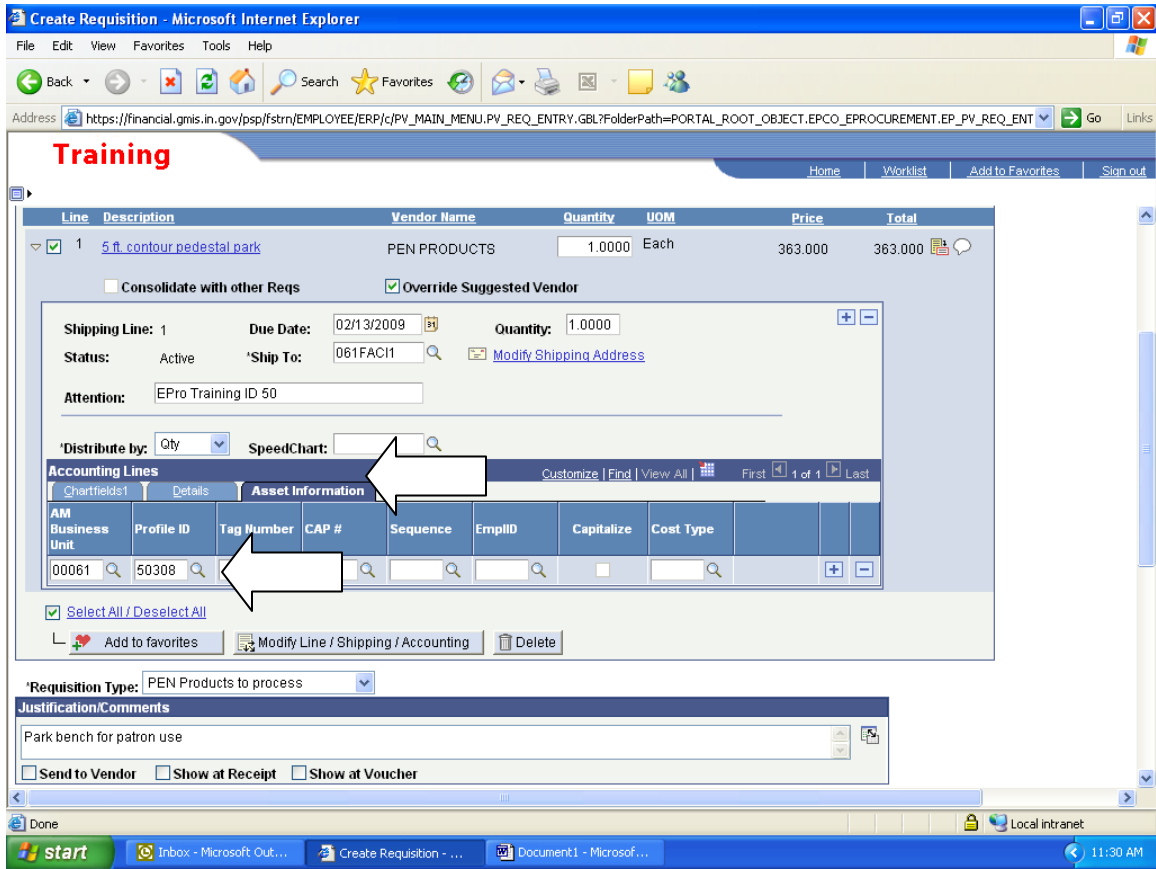
Select All / Deselect All

'Requisition Type: [Dropdown]

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Save as Template



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.

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](#) [SET](#)

Percent	GL Unit	Fund	Object	Program	Dept	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Subcategory	Product
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

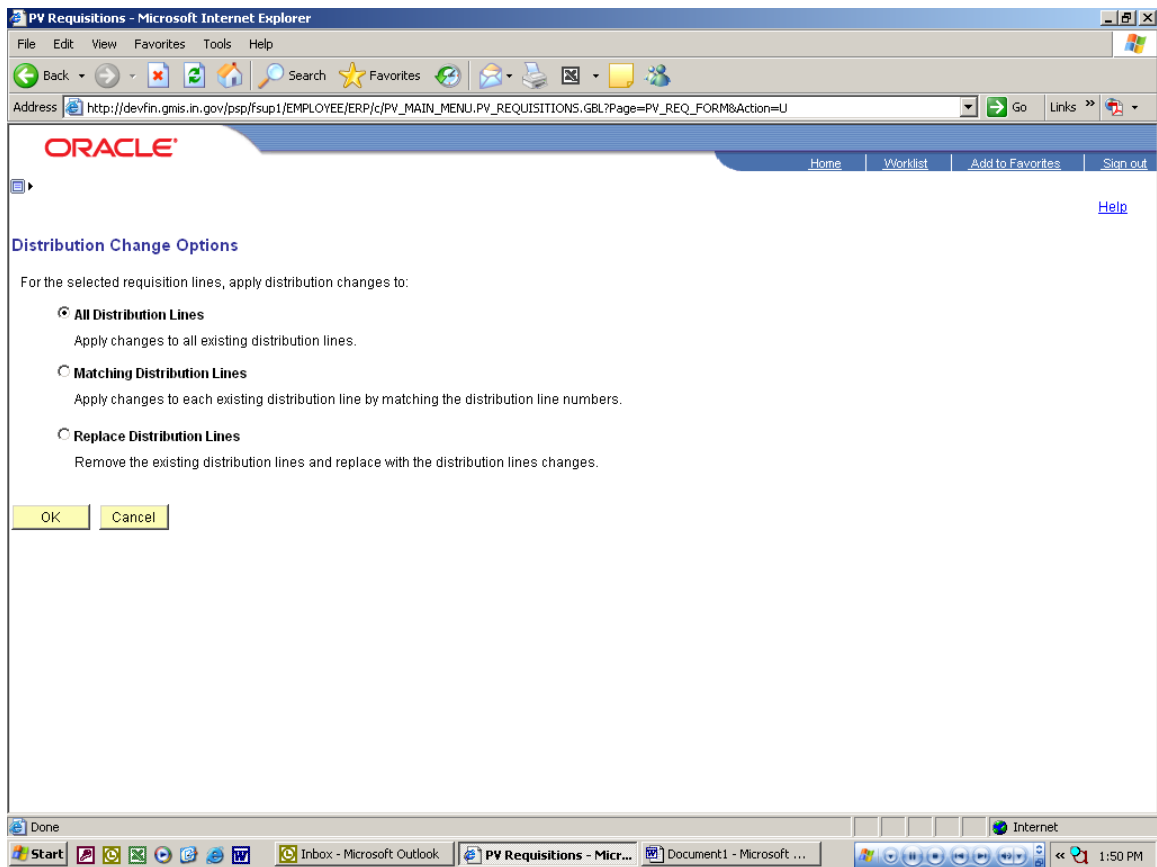
[Load Values From Defaults](#)

Apply Cancel

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.

Microsoft Internet Explorer - Create Requisition

Address: Q_ENTRY.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT_EP_PV_REQ_ENTRY_GBL&IsFolder=false&IgnoreParamTempl=FolderPath%2cFolder

Sand Box

Home | Worklist | Add to Favorites | Sign out

Menu

- Procurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Procurement Training & Resource
 - Services Procurement
 - Sourcing
 - Grants
 - Project Costing
 - Accounts Payable
 - Asset Management
 - Banking
 - Commitment Control
 - General Ledger
 - SCM Integrations
 - Set Up Financials/Supply Chain
 - Enterprise Components
 - Government Resource Directory
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Tax Center
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

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](#)

SOL_OBO

Not Routed

No Approvers Found

Procurement Agent

Staples: Initiated [Start New Path](#)

SOL_PRCAGENT

Not Routed

Multiple Approvers

PVWF_SOL_PROCUREMENT_AGENT

Local intranet

Microsoft Internet Explorer - Create Requisition

Address: Q_ENTRY.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT_EP_PV_REQ_ENTRY_GBL&IsFolder=false&IgnoreParamTempl=FolderPath%2cFolder

Sand Box

Home | Worklist | Add to Favorites | Sign out

Menu

- Procurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Procurement Training & Resource
 - Services Procurement
 - Sourcing
 - Grants
 - Project Costing
 - Accounts Payable
 - Asset Management
 - Banking
 - Commitment Control
 - General Ledger
 - SCM Integrations
 - Set Up Financials/Supply Chain
 - Enterprise Components
 - Government Resource Directory
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools
 - Tax Center
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Procurement Agent

Staples: Initiated [Start New Path](#)

SOL_PRCAGENT

Not Routed

Multiple Approvers

PVWF_SOL_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

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**

Manage Requisitions

Search Requisitions

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

Business Unit: 00800 **28** Requisition Name: **29**
 Requisition ID: **30** Request Status: All but Complete Budget Status: **31**
 Date From: 02/01/2007 **32** Date To: 02/22/2007 **33**
 Requester: **32** Entered By: PO ID: **33**

Search Clear

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	1.89 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](#)

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

Address: http://devfin.gmis.in.gov/pspf/sup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_STATUS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT.EP_

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

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 menu and click the Go button.

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

Create New Requisition Inquire Change Request Inquire Receipts Requisition Report

Main Content

Done, but with errors on page.

Start | Inboxes - Microsoft Outlook | Req from non QPA items ... | Manage Requisitions ... | 11:42 AM

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.

Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
michael qpa budget check cancel0000002893	00061	02/22/2007	Approved	44.00	

Justification / Comments:
test

Line	Item Description	Source Status	Qty	Price	Total
1	Baq.Paper.10 LB.2000/Bale.Kr...Available		1.0000	Case 44.000 USD	44.000

[Return to Manage Requisitions](#) [Requisition Schedule and Distribution](#)

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

Address: eProcurement&EOPP.SCPTfname=EPKO_EPROCUREMENT&FolderPath=PORTAL_ROOT_OBJECT.EPKO_EPROCUREMENT.EP_PV_REQ_ENTRY_GBL&IsFolder=false

Sand Box Home Worklist Add to Favorites Sign out

Help

Create Requisition

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.

Floor Brush,#1695,Street Broom,Nylon,16" Size

Requisition Price:	216.00000
Item ID:	000000000100072216
Category:	Brooms and mops and brushes an
Vendor:	EVANSVILLE ASSOC FOR THE BLIND
Vendor Item ID:	1695
Manufacturer:	N/A
Mfg Item ID:	N/A

[Return to Previous Page](#)

Done Local intranet

start Inbox - Microsoft Out... Creating a requisition... Create Requisition - ... 1:50 PM

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.

The screenshot shows the Oracle Manage Requisitions interface. At the top, there is a search form with fields for Business Unit (00061), Requisition ID, Date From (02/01/2007), Date To (02/22/2007), Requester, Entered By, and PO ID. Below the search form is a table of requisitions. The table has columns for Req ID, Requisition ID / Name, BU, Date, Status, Budget, and Total. Each row has a dropdown menu for actions and a 'Go' button.

Req ID	Requisition ID / Name	BU	Date	Status	Budget	Total	Actions
0000002893	michael qpa budget chec...	00061	02/22/2007	Approved	Not Chk'd	44.00 USD	<Select Action...> Go
0000002892	michael qpa	00061	02/22/2007	Canceled	Not Chk'd	0.00 USD	<Select Action...> Go
0000002891	Michael test 2	00061	02/20/2007	Approved	Valid	1.00 USD	<Select Action...> Go
0000002890	Michael test for manual	00061	02/20/2007	Open	Valid	1.00 USD	<Select Action...> Go
0000002889	PROC TEST	00061	02/20/2007	Approved	Valid	2.00 USD	<Select Action...> Go
0000002888	Jearia Paint GPA	00061	02/20/2007	Approved	Valid	335.28 USD	<Select Action...> Go
0000002887	Jearia Special request	00061	02/20/2007	Approved	Valid	5,176.00 USD	<Select Action...> Go
0000002886	Jearia Fac Man Ice melt	00061	02/16/2007	PO(s)	Valid	714.38 USD	<Select Action...> Go

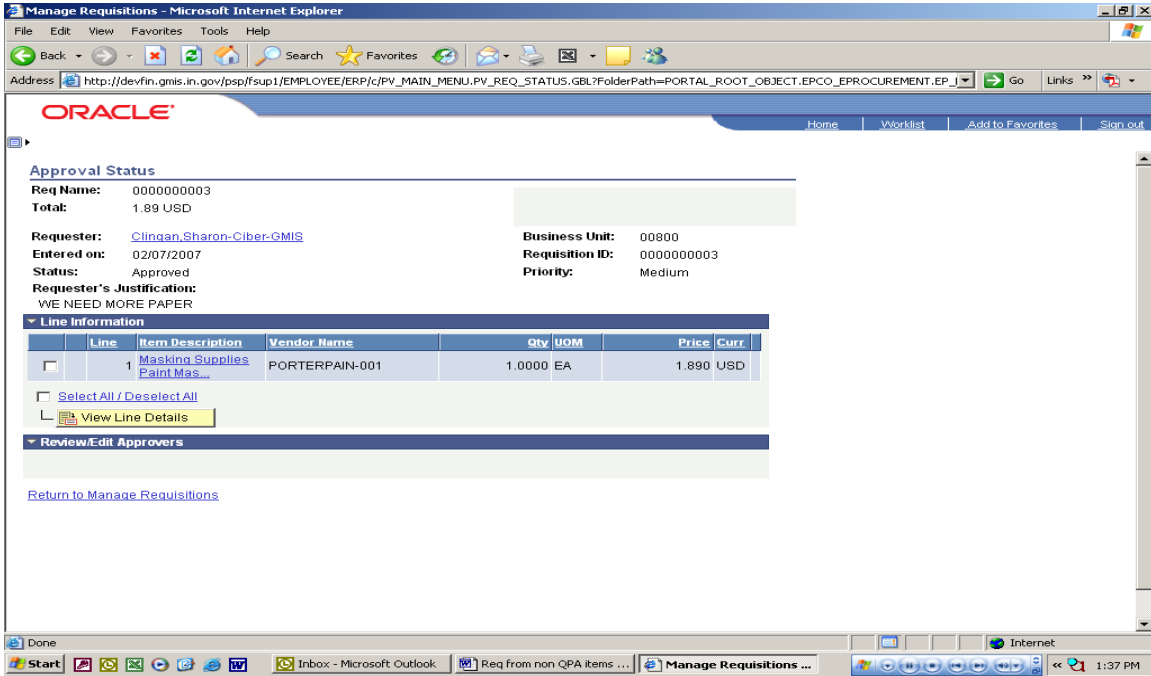
Requisition Cycle

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.

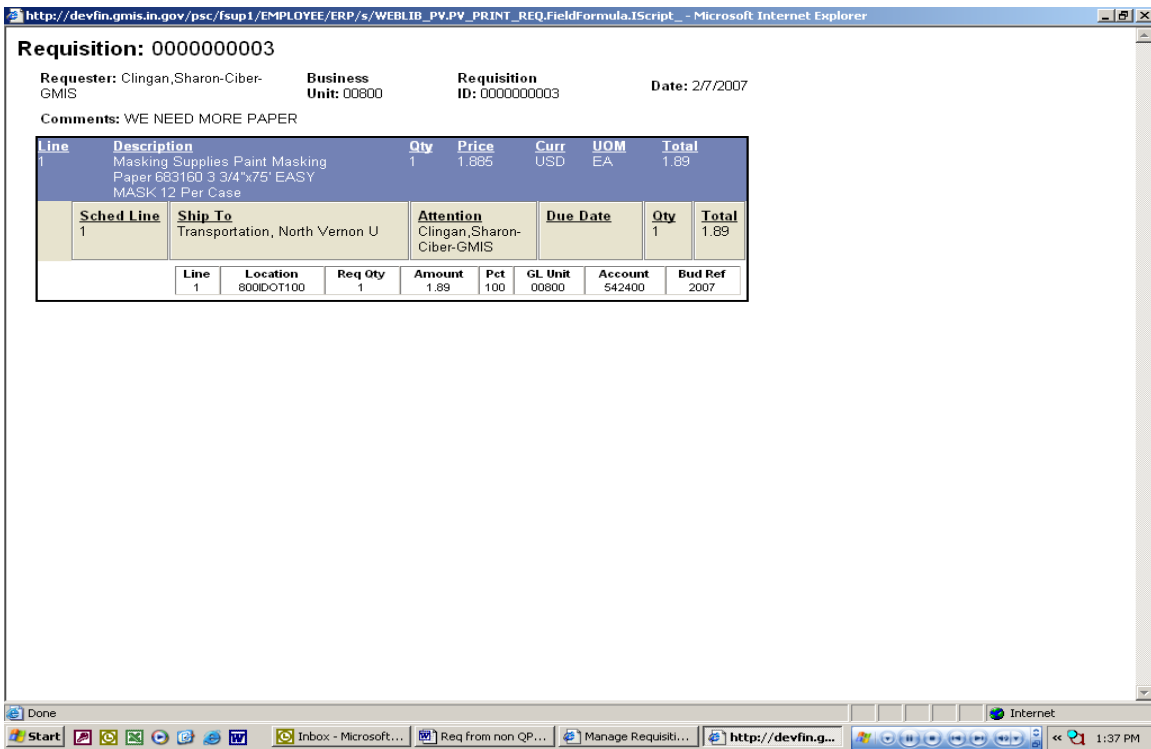
The screenshot shows the Oracle Requisition Cycle screen for requisition M233168. On the left, there is a box with requisition details: Business Unit (00061), Requisition Name (michael qpa budget check cancel), Date Entered (02/22/2007), and Date Last Changed (02/22/07 11:14:51AM). The main content is a circular flow diagram with the following stages: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. A 'Main Content' button is located at the bottom right of the diagram.

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.

Manage Requisitions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://devfin.gmis.in.gov/psp/psup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_STATUS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPROCUREMENT.EP_ Go Links »

ORACLE® Home Worklist Add to Favorites Sign out

New Window Help

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Run Control ID: begins with printreq

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

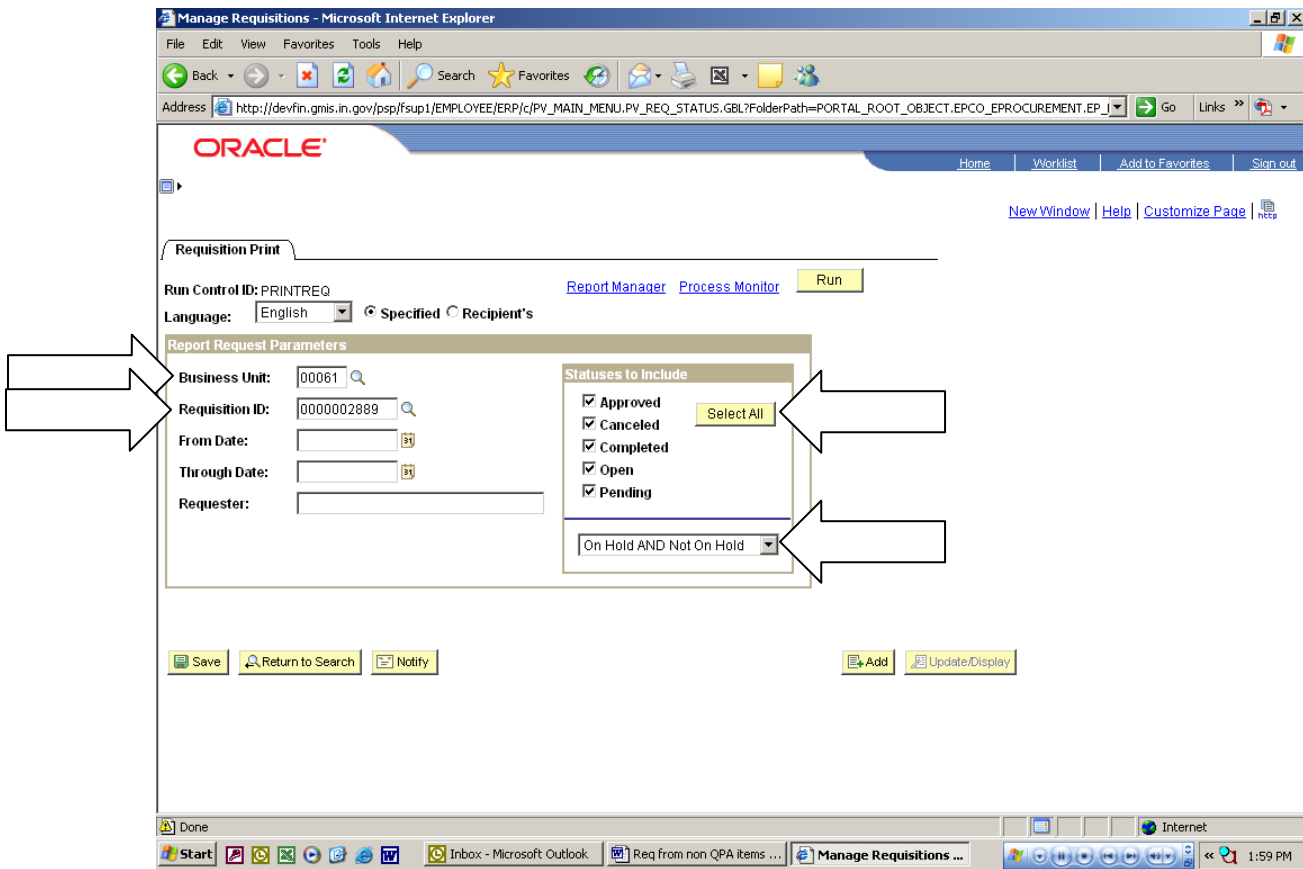
Start | Inboxes - Microsoft Outlook | Req from non QPA items ... | Manage Requisitions ... | 1:59 PM

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.

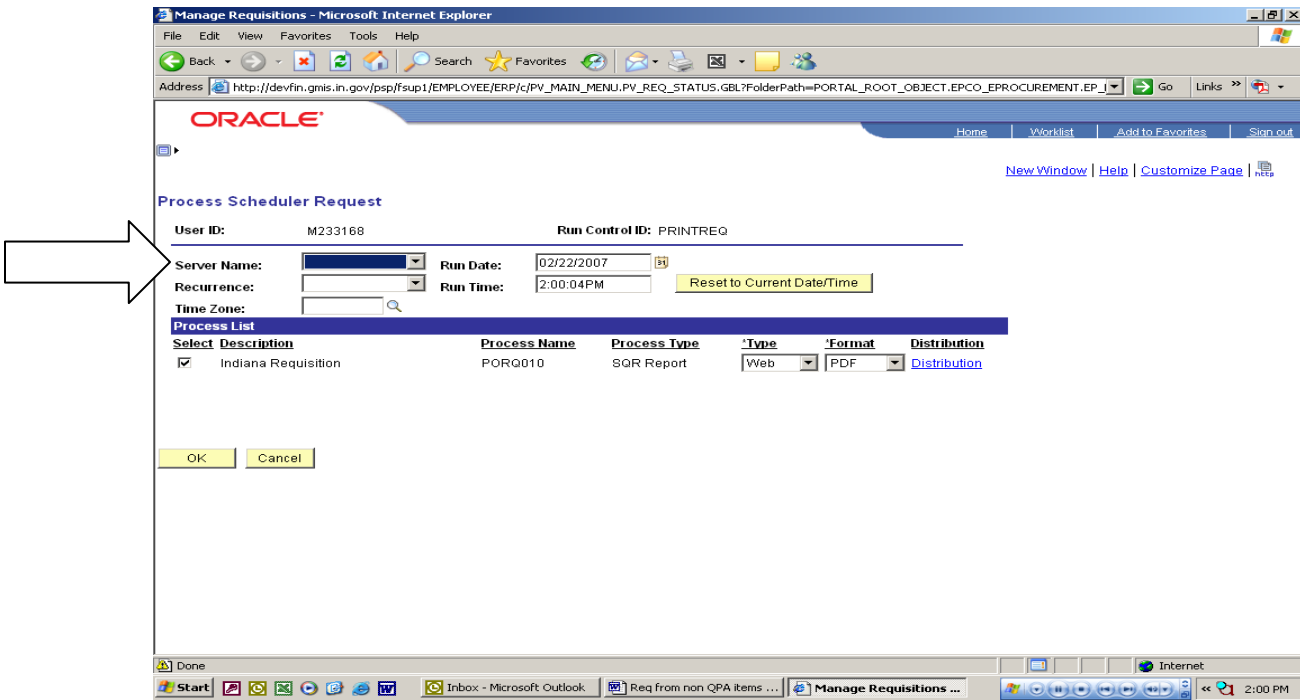
On this screen you will need to enter the five digit Business Unit number and the ten digit Requisition ID in the corresponding boxes.

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.

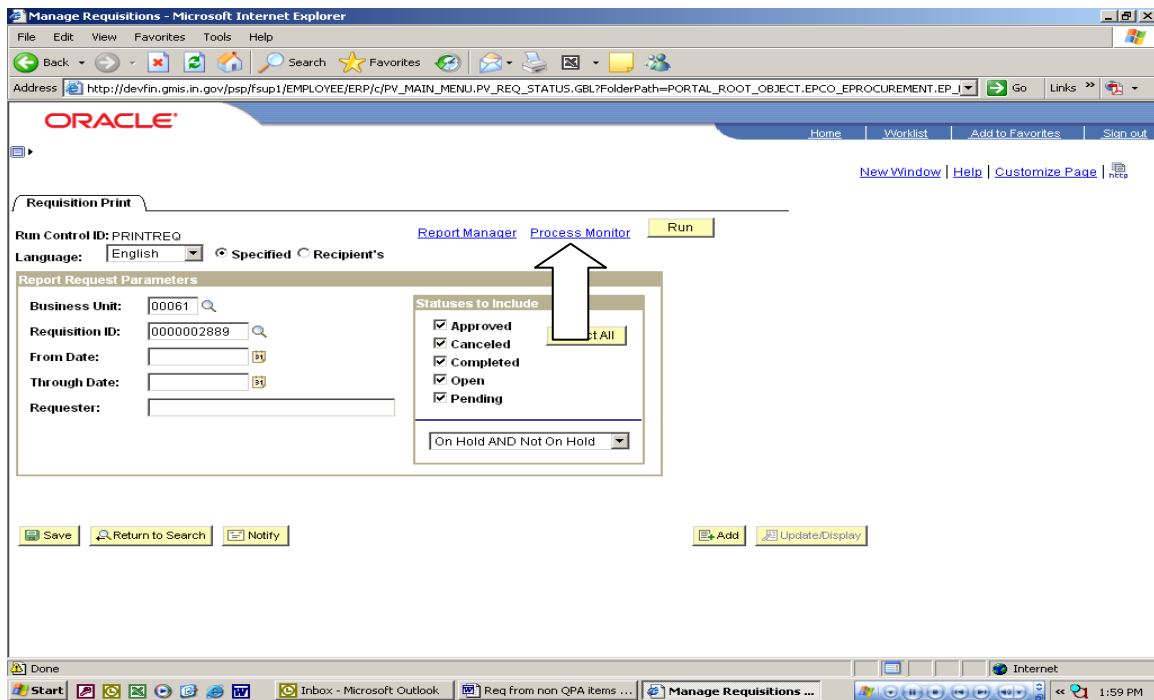
To continue the processing click the Run button. This will take you to a new screen.



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.

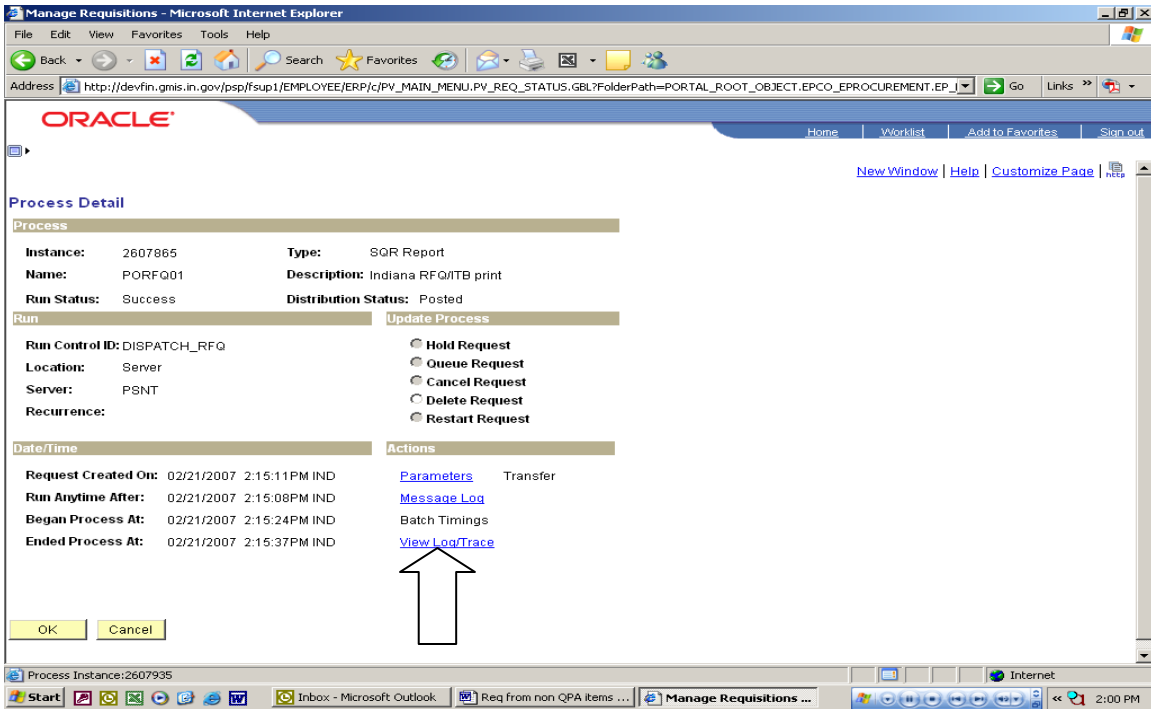
Once all statuses are what they need to be, then click the Details link to be taken to the next screen.

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 links for 'New Window', 'Help', and 'Customize Page'. The main content area has a 'Process List' tab selected. Underneath, there's a 'View Process Request For' section with search filters for User ID, Server, Run Status, and Distribution Status, along with a 'Refresh' button and a 'Save On Refresh' checkbox. The 'Process List' table below has the following data:

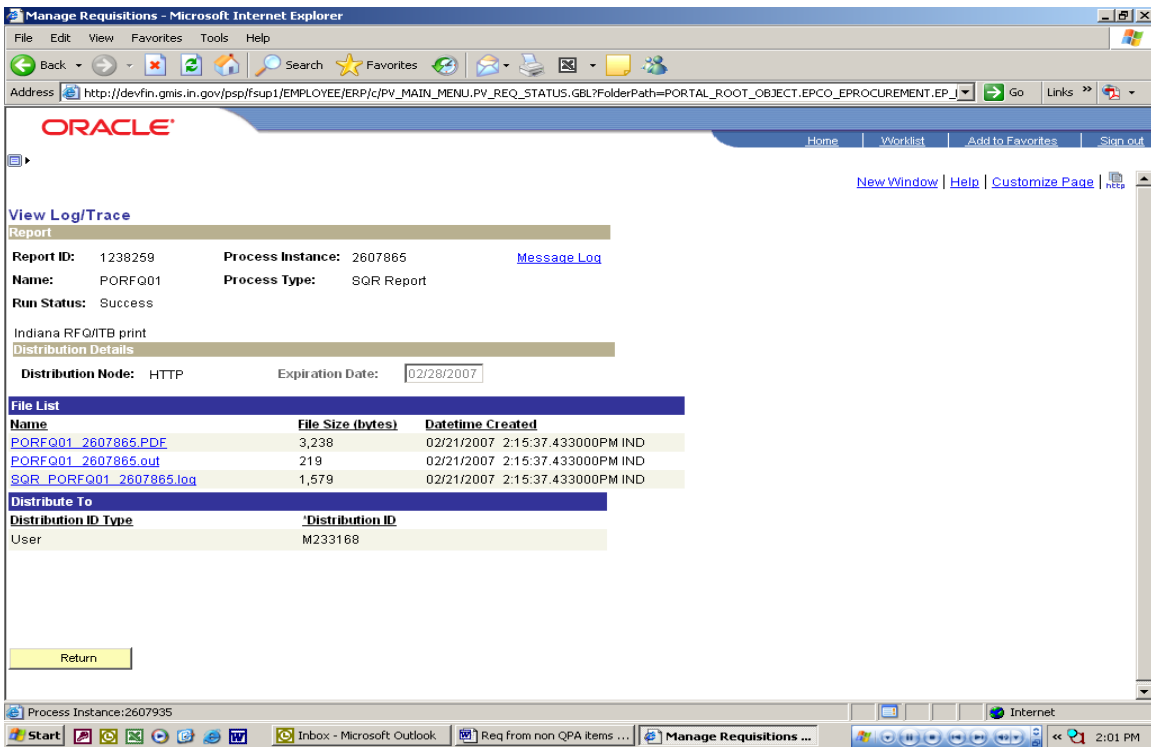
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2607935		SQR Report	PORQ010	M233168	02/22/2007 2:00:04PM IND	Queued	N/A	Details
<input type="checkbox"/>	2607865		SQR Report	PORFQ01	M233168	02/21/2007 2:15:08PM IND	Success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

At the bottom of the page, there are 'Save' and 'Notify' buttons, and a 'Process List | Server List' link. The Windows taskbar at the very bottom shows the Start button, several application icons, and the system clock at 2:00 PM.

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.