

CREATING A REQUISITION FOR NON-QPA GOODS & SERVICES

Create a “Special Request” Requisition

This guide is to be used when an item or service is not in the PeopleSoft catalog or when an item that should be in the Search Catalog function is not available. This guide only covers the creation of the requisition.

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

Requestion 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	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, requestor, and other information that applies to the entire requisition.

Business Unit: Department of Administration

Requestor: Jeener, Jeania-061

Requisition Name: **Priority:**

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 (EET)

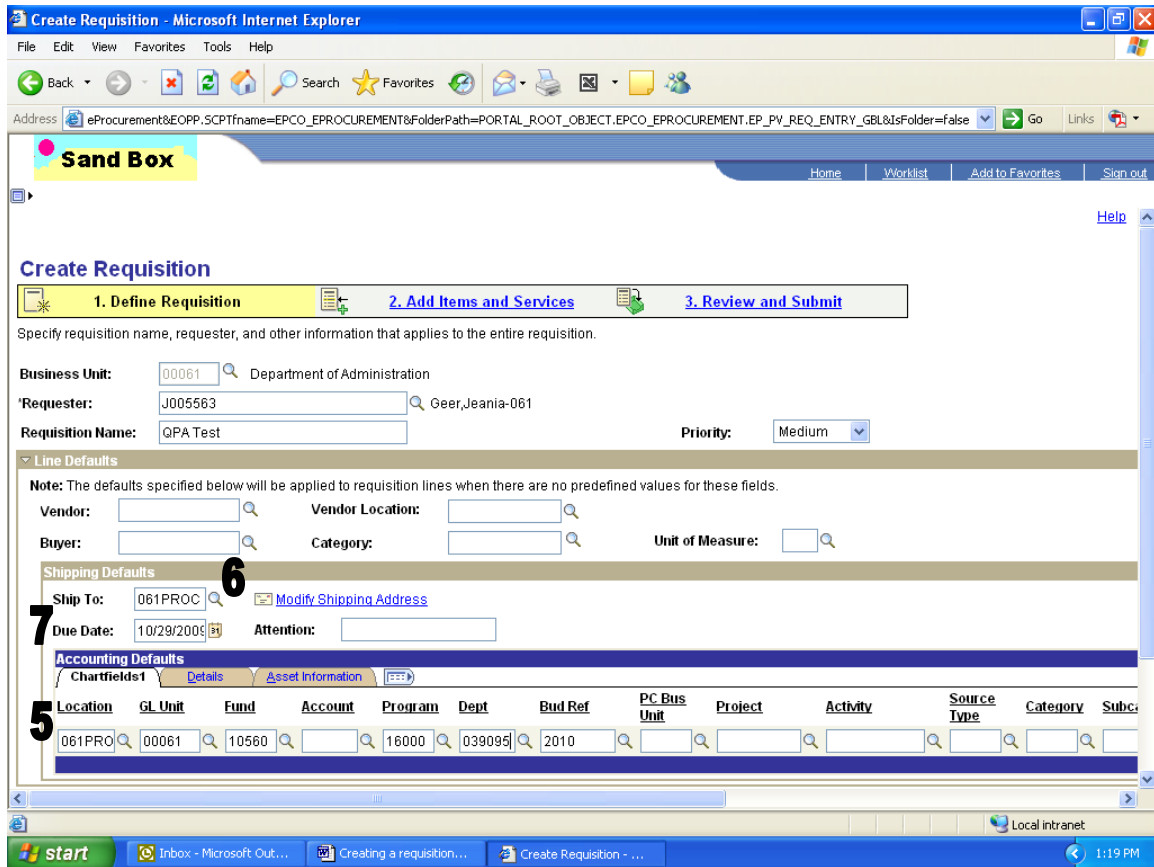
Location	GL Unit	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project	Activity	Source Type	Category	Subc
061PRO	00061			10000	039000	2010						

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

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.

The screenshot shows a web browser window titled "PV Requisitions - Microsoft Internet Explorer". The address bar contains the URL: http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQUISITIONS.GBL?Page=Page.PV_REQ_FORM&Action=U&BUSINESS_UNIT=00061. The page content includes the Oracle logo and navigation links (Home, Worklist, Add to Favorites, Sign out). The main heading is "Look Up Ship To". Below this, there are input fields for "SetID:" (with "STIND" entered), "Ship To Location:" (with a dropdown menu set to "begins with"), and "Description:" (with a dropdown menu set to "begins with"). There are buttons for "Look Up", "Clear", "Cancel", and a link for "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 Last

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 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 to proceed to create the non-QPA item to be purchased.

Add Items and Services

Once you have gotten to the Add Items and Services screen you will need to select the tab titled Special Request. You will see the screen below allowing you to select one of four options. The only option you should use is Special Item. This option is used for both goods and services. After choosing this option you will be able to enter all the information about the item or service you will be purchasing.

ORACLE

Home Worklist Add to Favorites Sign out

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: Search

Catalog Favorites Templates Forms Web **Special Request**

Select a Request Type

- [Special Item](#) Request an item that is not listed in the Catalog. **Always Use**
- [Fixed Cost Service](#) Request a one-time service for a flat fee.
- [Variable Cost Service](#) Request a service for which the fee is based on the time worked.
- [Time and Materials](#) Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Start | Inboxes - Microsoft Outlook | Create Requisition - ... | Document1 - Microsoft ... | 12:16 PM

Once you have clicked the Special Item link you will see the page below and you will need to complete several pieces of information about the item you are wanting to purchase.

The information you will need to complete are:

- 8. Item Description**
- 9. Price**
- 10. Quantity**
- 11. Unit of Measure**
- 12. Category**
- 13. Due Date (not required)**
- 14. Additional Information (not required)**

The screenshot displays the Oracle 'Create Requisition' web application. The page title is 'Create Requisition' and it features a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The main content area is titled 'Create Requisition' and includes a progress bar with three steps: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. Below the progress bar, there is a search bar and a 'Search' button. The 'Special Item' form is the central focus, with fields for: *Item Description (8), *Price (9), *Quantity (10), *Category (12), Vendor ID (12), Vendor Item ID, Mfg ID, Mfg Item ID, *Currency (USD), *Unit of Measure (11), and Due Date (13). There is also an 'Additional Information' section (14) with a text area and a 'Send to Vendor' checkbox. The bottom of the page shows a taskbar with various application icons and a system clock showing 12:18 PM.

8. Item Description

This line is to contain a brief description of the good or service being requested. If you have additional information on the good or service to be provided to the vendor, this can be placed in the Additional Information section.

9. Price

Enter the estimated price for the good or service being requested.

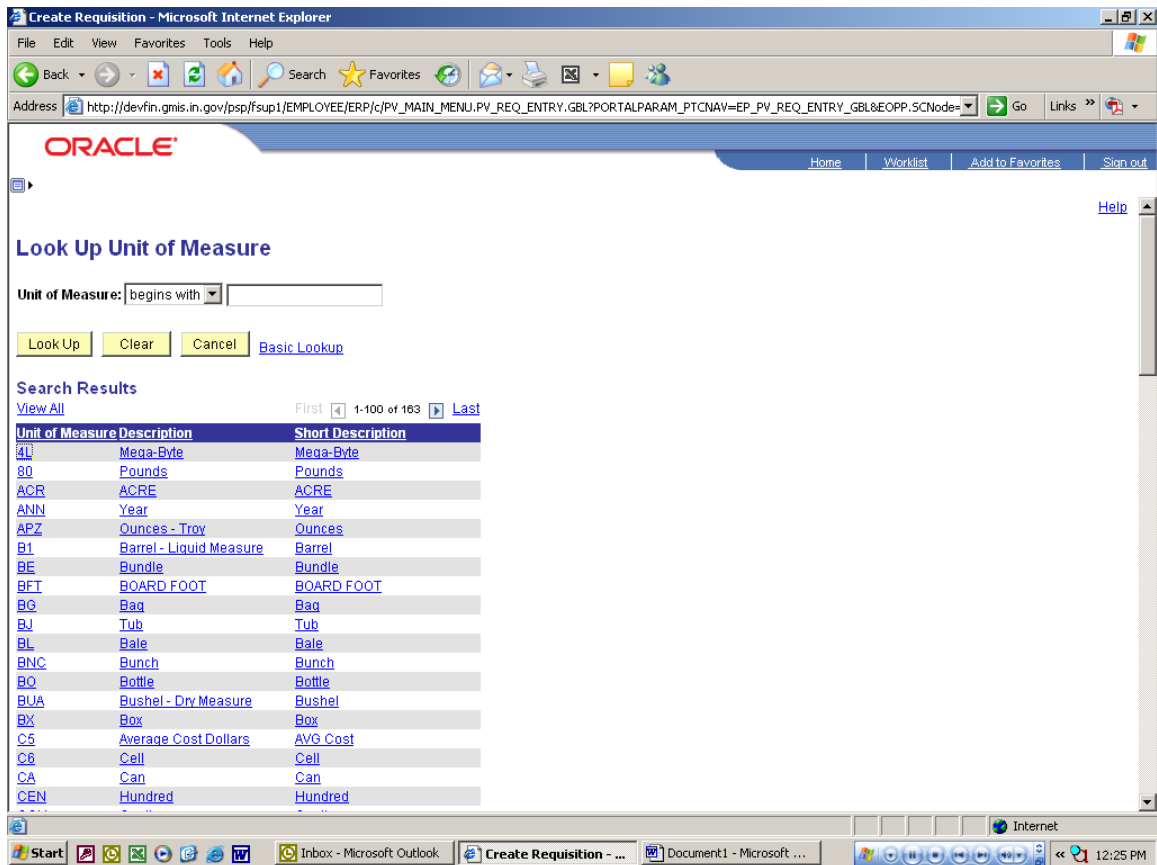
10. Quantity

Enter the number of each good or service you are requesting. If you intend to make the purchase order "Amount Only", then enter a quantity of one with an appropriate unit of measure.

11. Unit of Measure

Enter the unit of measure specific to the good or service being requested.

If you are not sure of the unit of measure to choose, you can click the magnifying glass to the right of the Unit of Measure section to be taken to the search screen as shown below. Search the values in the list that is displayed for the unit of measure you need. You must choose a unit of measure from the approved list or it will cause an error.



The screenshot shows the Oracle 'Look Up Unit of Measure' search screen. The browser window title is 'Create Requisition - Microsoft Internet Explorer'. The address bar shows the URL: http://devfin.gmis.in.gov/psp/fsup1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTRY_GBL&EOPP_SCNode=

The page header includes the Oracle logo and navigation links: Home, Worklist, Add to Favorites, Sign out, and Help.

The main section is titled 'Look Up Unit of Measure'. It features a search input field with a dropdown menu set to 'begins with'. Below the input field are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'.

The search results are displayed in a table with the following columns: Unit of Measure, Description, and Short Description. The results are sorted by 'Unit of Measure' and show 1-100 of 163 results.

Unit of Measure	Description	Short Description
4U	Mega-Byte	Mega-Byte
80	Pounds	Pounds
ACR	ACRE	ACRE
ANN	Year	Year
APZ	Ounces - Troy	Ounces
B1	Barrel - Liquid Measure	Barrel
BE	Bundle	Bundle
BFT	BOARD FOOT	BOARD FOOT
BQ	Bag	Bag
BJ	Tub	Tub
BL	Bale	Bale
BNC	Bunch	Bunch
BO	Bottle	Bottle
BUA	Bushel - Dry Measure	Bushel
BX	Box	Box
C5	Average Cost Dollars	AVG Cost
C6	Cell	Cell
CA	Can	Can
CEN	Hundred	Hundred

The taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 12:25 PM.

12. Category

Enter the Category code; this is also known as the United Nations Standard Products and Services Code (UNSPSC). If you know your eight (8) digit UNSPSC code for the good or service, enter it. If you do not know the correct UNSPSC code, you should click the magnifying glass to the right of this section. You will see the following screen.

The screenshot shows a web browser window titled "Create Requisition - Microsoft Internet Explorer". The address bar shows the URL: http://gmiswebp05pw.shared.state.in.us/psp/fsaossnd/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTRY_GBL. The page content includes a "Sand Box" header, a navigation menu on the left, and a main section titled "Create Requisition" with a sub-section "Look Up Category".

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

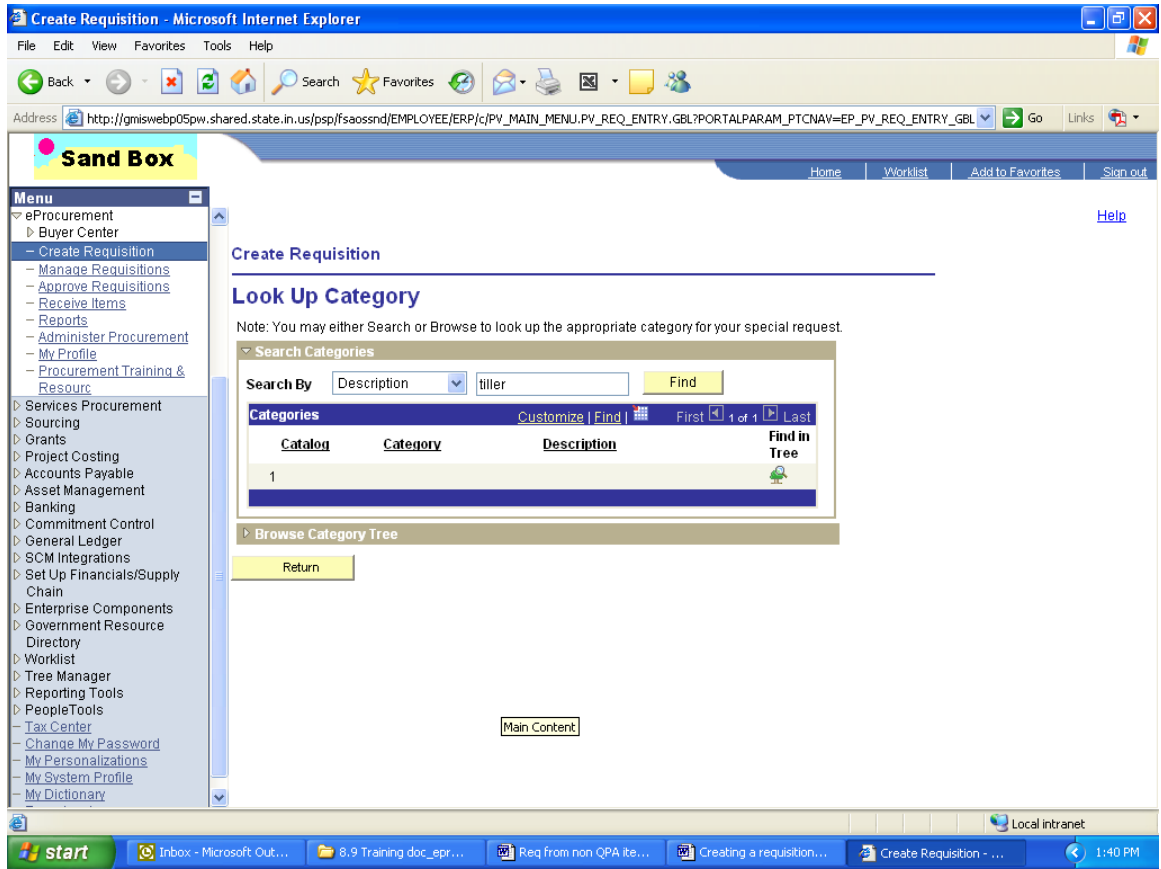
Search Categories

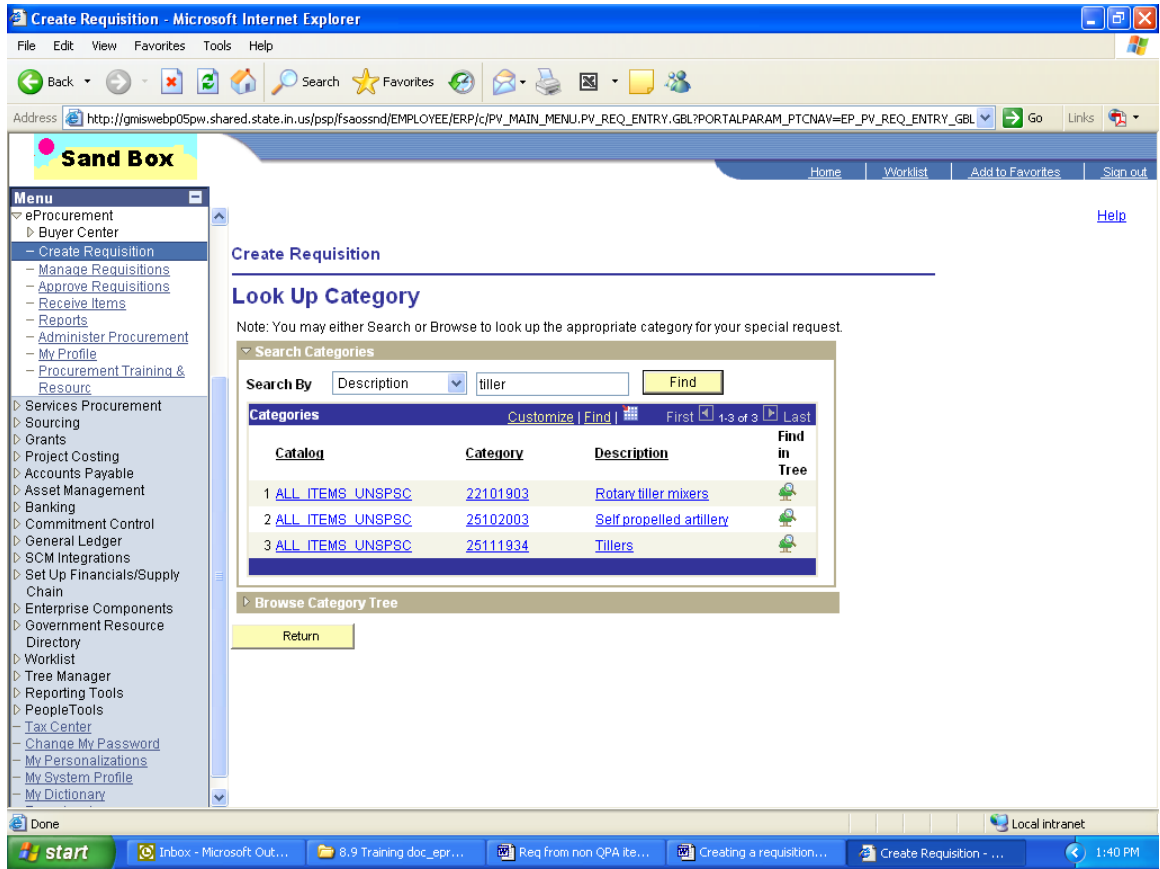
Search By:

Categories	Customize	Find	First	1 of 1	Last
Catalog	Category	Description	Find in Tree		
1					

Browse Category Tree

Enter a brief description in the dialog box and click Find. It is best to truncate, use the single version of words and few adjectives at the beginning of your search.





Click on the most appropriate choice based on the item/service being purchased. It may be helpful to sort the description column (click on Description). Go to www.unspsc.org to see the entire description or to search outside of PeopleSoft. The UNSPSC code does drive the Account number defaulted on the line and whether or not the item is automatically signified as an Asset.

13. Due Date

Enter the date the goods/services are to be delivered. You can either enter the date in the required space in the format of MM/DD/YYYY (2 digit month and 2 digit date and 4 digit year, i.e. 01/01/1900) or you can search for a due date by clicking on the date page icon to the right of this section.

14. Additional Information

This section allows you to place any necessary line information that is to be printed on the requisition or the RFQ concerning the good or service. If you want the information to be placed on the requisition or RFQ as a line comment, you must check the Send to Vendor box. Otherwise, the comment only shows up on the requisition if no line comment is entered. You can check the spelling of your comment by clicking on the book with the check mark icon to the right of the comment box.

NOTE: Do not select a vendor or manufacturer information at this time. You will select the vendor at the Purchase Order creation and RFQ steps.

Once you have completed all the fields you require for your good or service, you can click either the Add Item or Add and Start New Type button to add the item to the requisition. If you only need this one item, choose Add Item. If you need more items, choose the Add and Start New Type option and complete the previous steps for each item you need added to the requisition.

Once all the items have been added to your requisition you will need to click on the Review and Submit link to: review all information, make changes, budget check, save and submit the requisition to the approval workflow.

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:

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

15

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

16

17

18

19

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22

23

15. Adding Line Comments

To add line comments (if not added as an Additional Information when creating item), click on the Comments icon to open the Line Comments screen. If the comments are needed on the requisition, RFQ or Purchase, order please make sure the **Send to Vendor** box is checked.

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

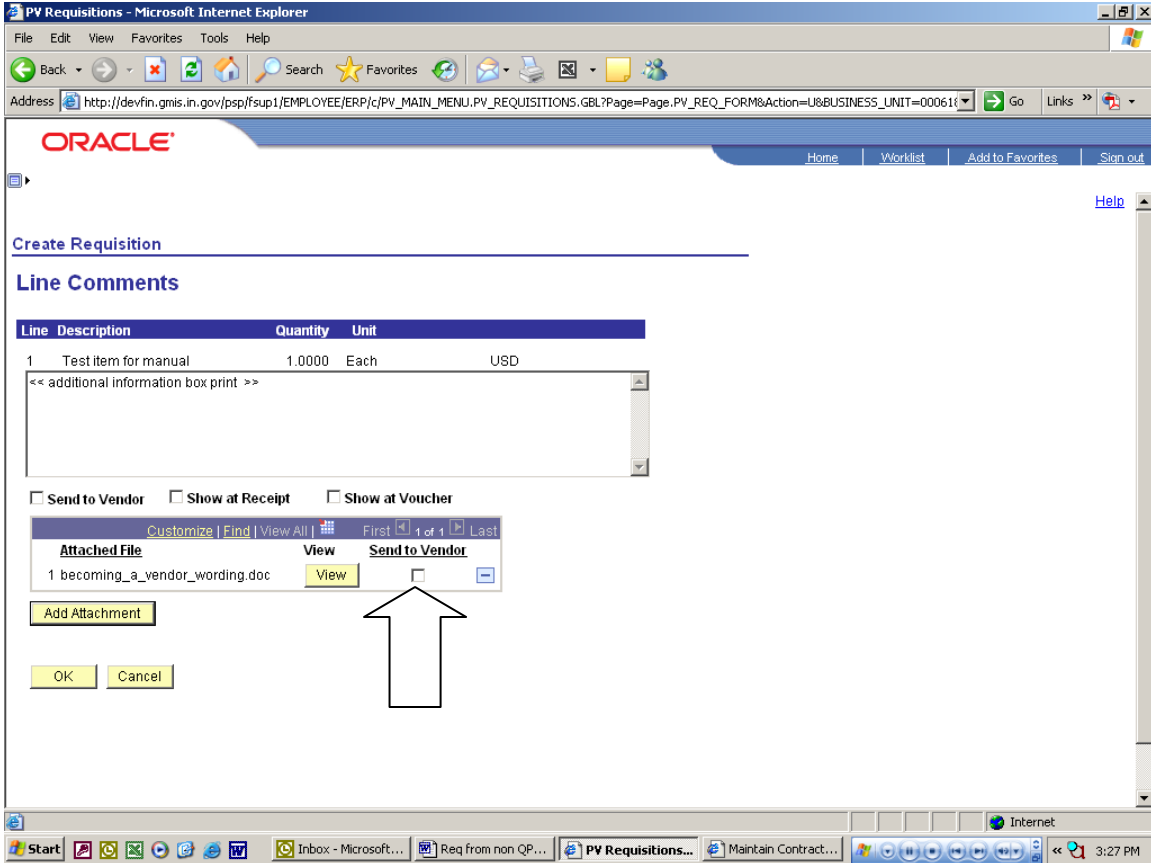
<< Test for additional information to see where prints >>

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.

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

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.

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: J005563 Geer, Jeania-061
Requisition Name: Roto Tiller **Priority:** Medium

Vendor Name	Quantity	UOM	Price	Total
	1.0000	Each	525.000	525.000

Requisition Lines

Select All / Deselect All

Add to favorites Modify Line / Shipping / Accounting Delete

Requisition Type: Small Purchase

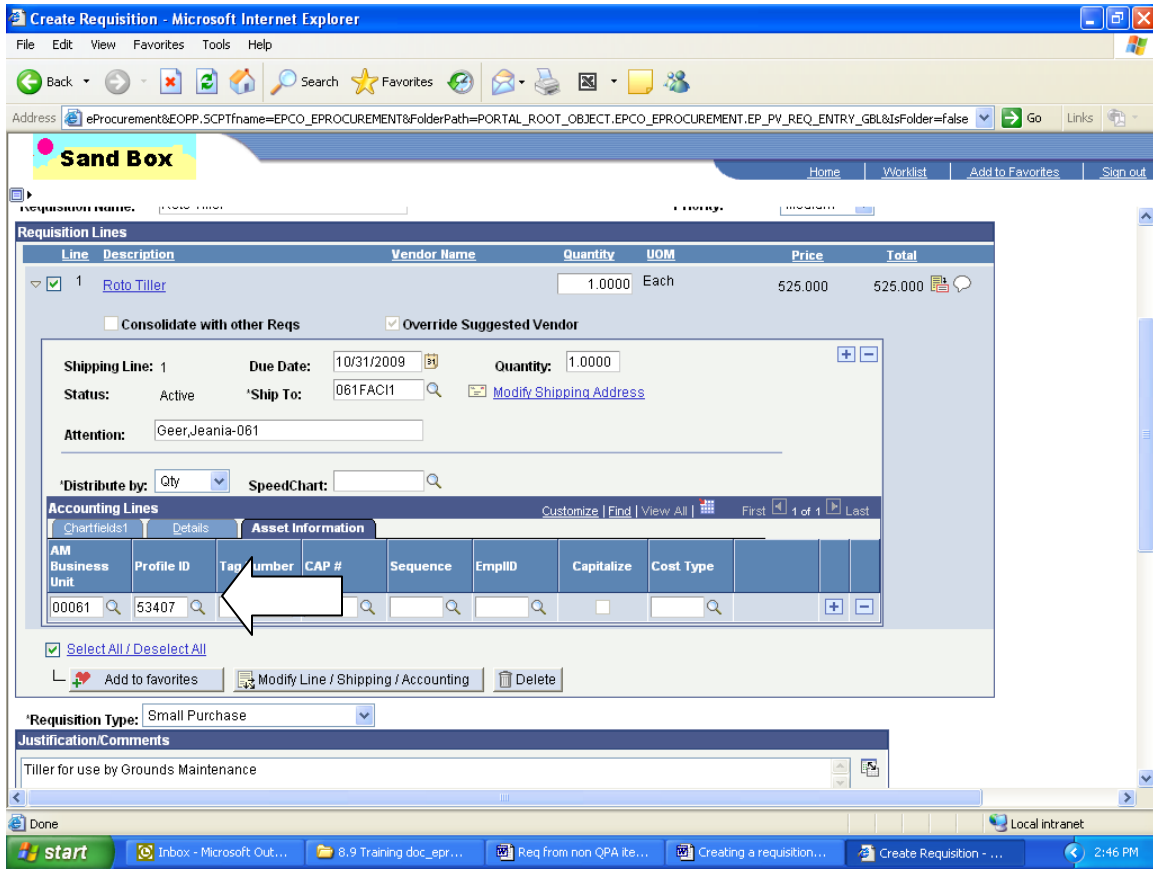
Justification Comments: Tiller for use by Grounds Maintenance

Send to Vendor Show at Receipt Show at Voucher

Check Budget

Save as Template

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



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.

16. 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 and all Chartfields will be populated from your defaults entered during the Define Requisition stage..

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

Sand Box 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 Custom

Chartfields1 Details Asset Information +

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](#)

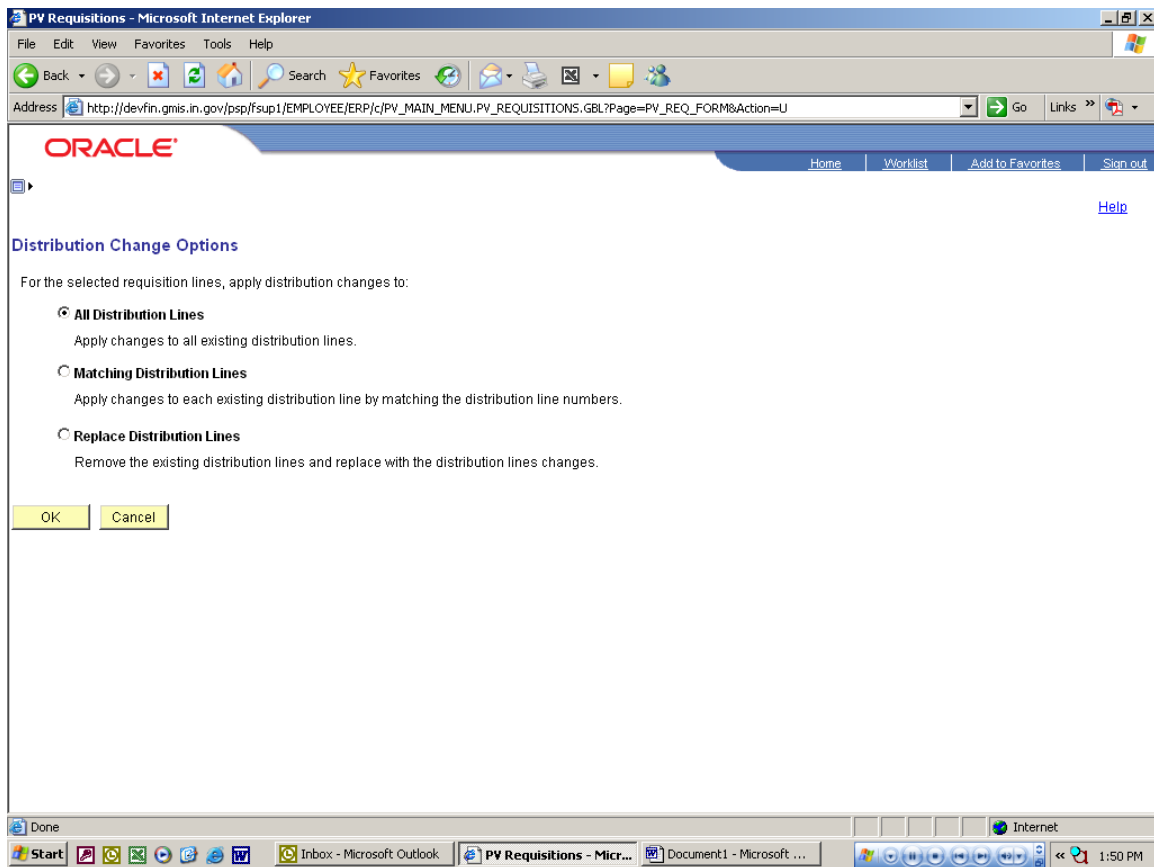
Apply Cancel

Local intranet 2:19 PM

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: 1) to have the changes affect all requisition lines mark "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, choose "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.



17. Choose Requisition Type

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

18. 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, 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.

19. 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.**

20. 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 to the requisition.

21. 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.

22. 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 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%2cisFolder

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

PWWF_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%2cisFolder

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

PWWF_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

23. 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 Requisitions link.

Manage Requisitions

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:

- 24. Business Unit**
- 25. Requisition Name**
- 26. Requisition ID**
- 27. Date range**
- 28. Requestor**
- 29. PO ID**

Manage Requisitions

Search Requisitions

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

Business Unit: 00800 **24** Requisition Name: **25**
 Requisition ID: **26** Request Status: All but Complete Budget Status: **27**
 Date From: 02/01/2007 Date To: 02/22/2007 **28**
 Requester: **29** 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 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:

- 30. Req ID
- 31. Requisition ID/Name
- 32. BU (Business unit)
- 33. Date
- 34. Status
- 35. Budget
- 36. Total
- 37. Requisition report
- 38. Additional actions that can be completed on requisition

Clicking on the blue names for fields 30 to 36 will place the requisitions in numerical or alphabetical order.

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: Request Status: All but Complete Budget Status: Requester: Date From: 02/01/2007 Date To: 02/22/2007 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 Actions 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. Internet

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

30. 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

Manage Requisitions - Microsoft Internet Explorer

Address: http://devfin.gmis.in.gov/psp/f/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](#) | [Print](#)

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: 000000000100013884
Category: Paper bags
Vendor: ACORN DISTRIBUTORS INC
Vendor Item ID: GBG10
Manufacturer: DURO BAG
Mfg Item 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](#)

Done | Internet | 12:44 PM

31. 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.

32. BU (business unit)

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

33. Date

This is the date the requisition was created and saved.

34. Status

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

35. 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.

36. Total

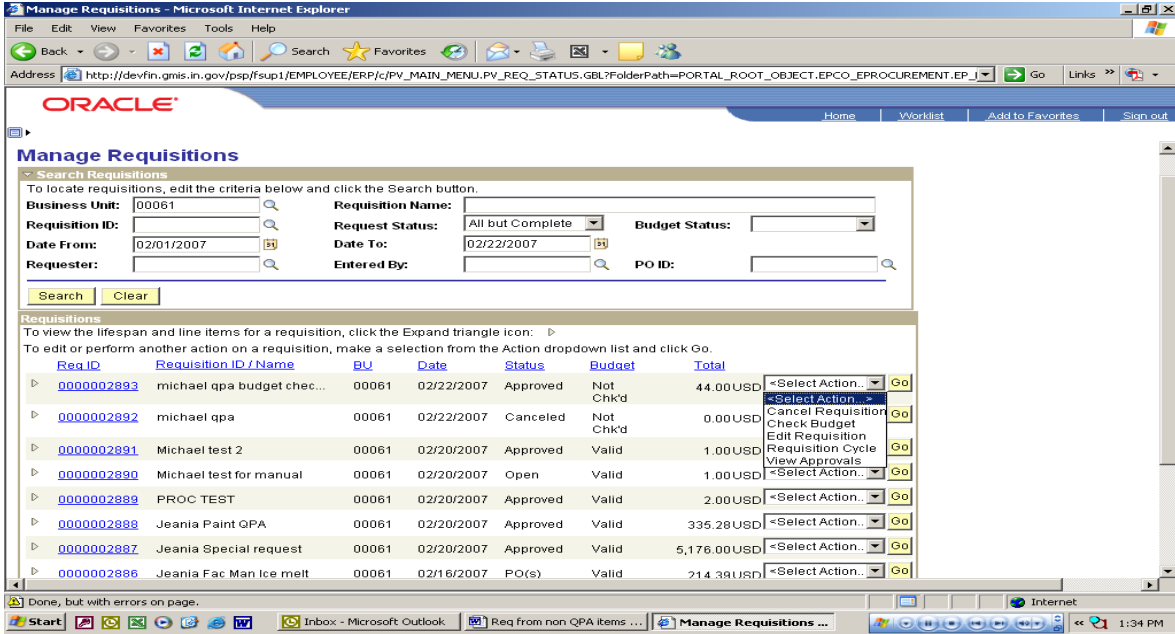
This column shows the total dollar amount for the requisition. This generally is an estimate of the final purchase amount unless it is a requisition created from items found in the search catalog.

37. 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.

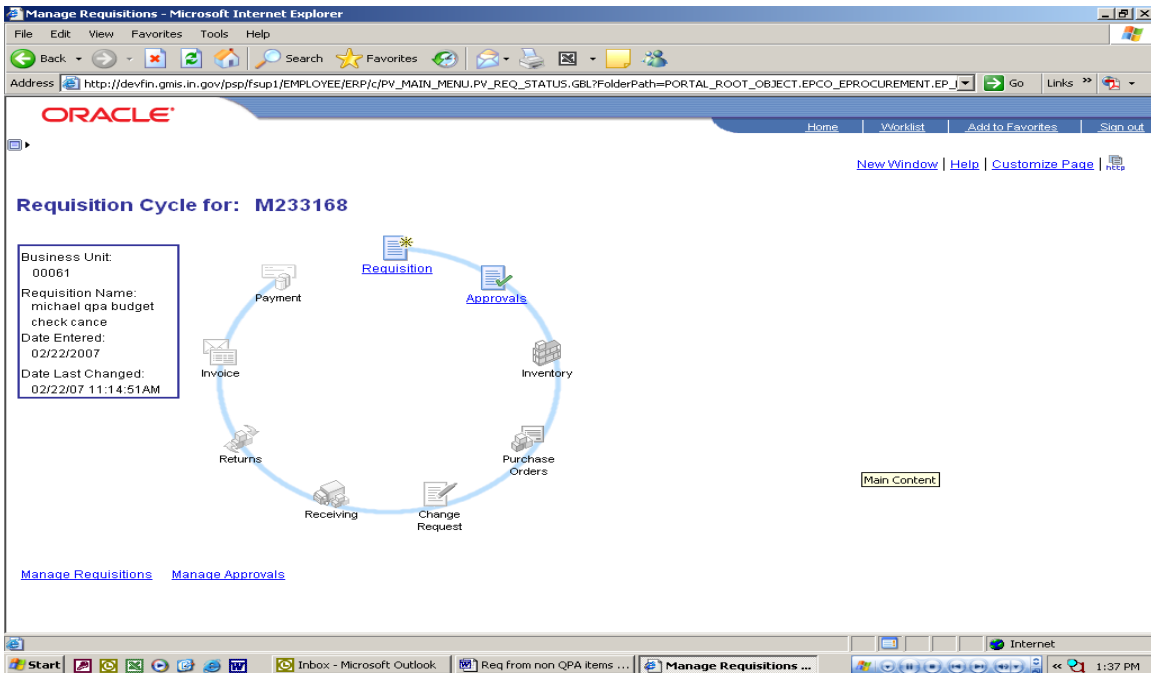
38. Additional actions that can be completed on requisition

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.

The screenshot shows the Oracle Manage Requisitions web application in Microsoft Internet Explorer. The page title is "Approval Status".

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

Line Information

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

Buttons: Select All / Deselect All, [View Line Details](#)

Review/Edit Approvers

[Return to Manage Requisitions](#)

Line Detail Screen

The screenshot shows the Oracle Line Detail Screen for requisition 0000000003.

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.

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

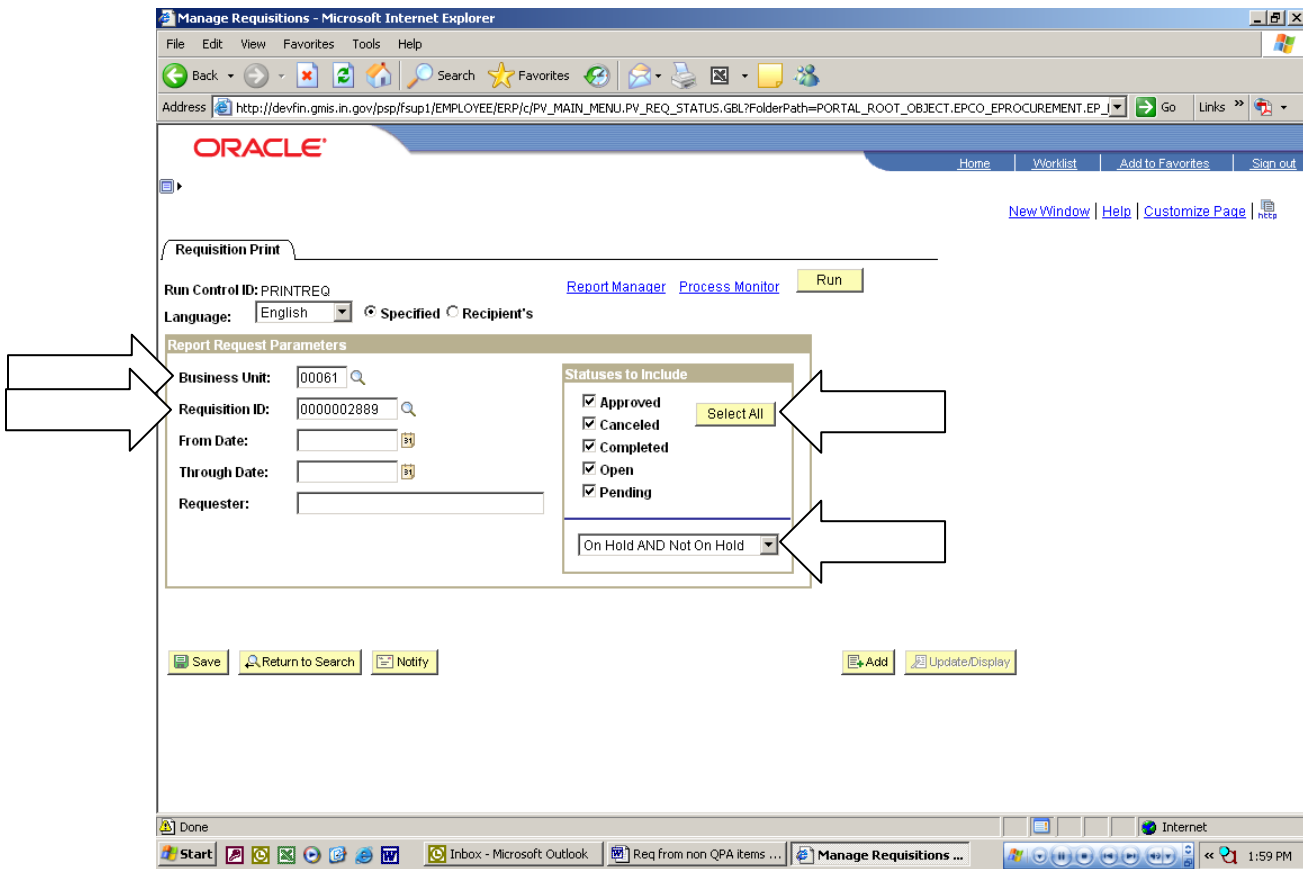
Start | Inboxes - Microsoft Outlook | Req from non QPA items ... | Manage Requisitions ... | 1:59 PM

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.

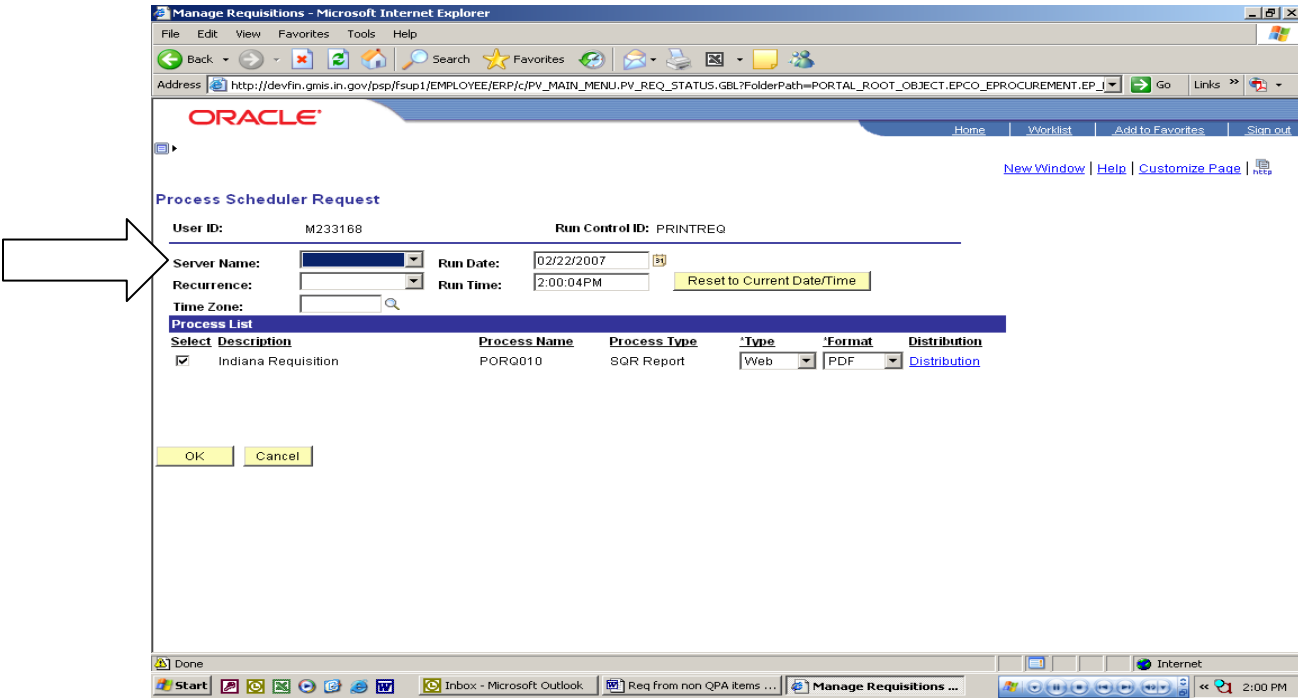
On this screen you will need to enter the five digit Business Unit number and the ten digit Requisition ID in the corresponding areas.

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.

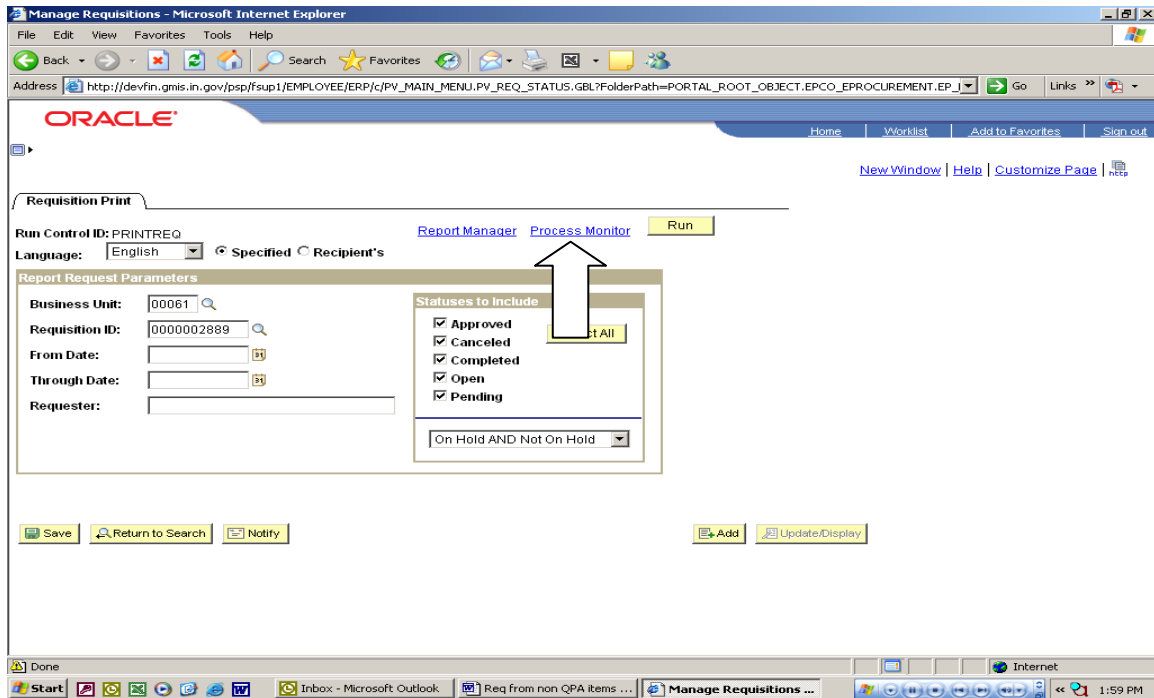
To continue the processing click the Run button. This will take you to a new screen.



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.



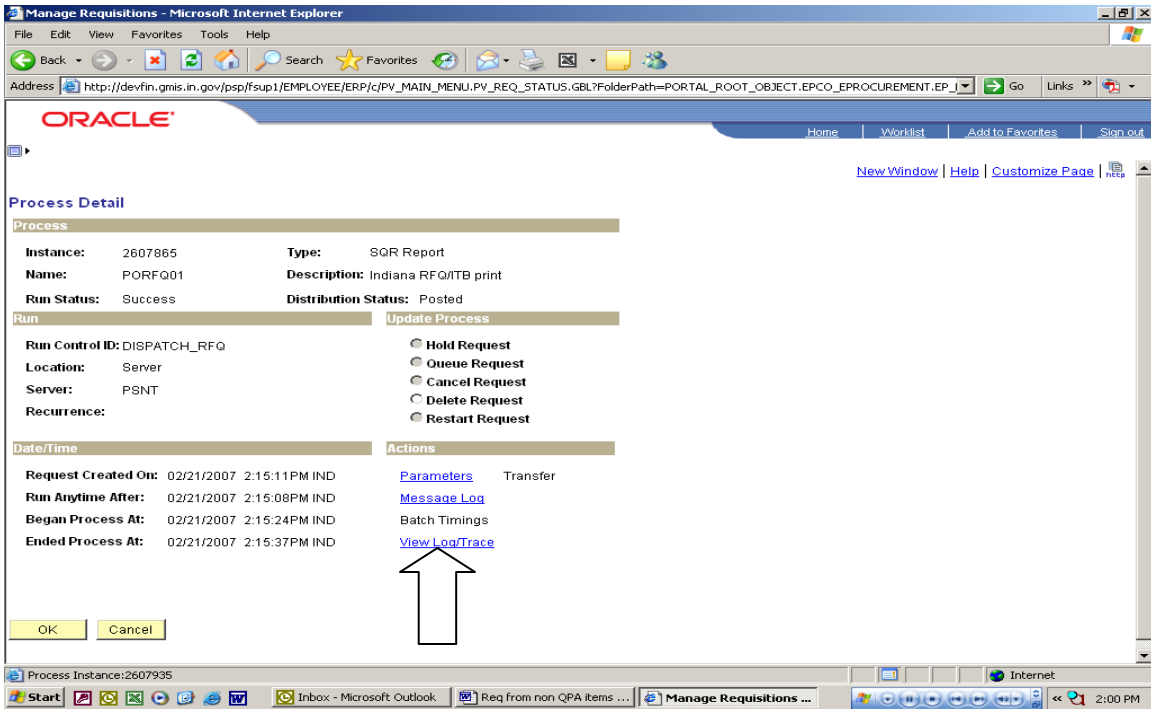
After clicking the Process Monitor link the following screen will allow the PDF creation process to be monitored and to be able to access and print a copy of the requisition PDF. At this screen your process will be the top line listed. You want the Run Status column to be Success and the Distribution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

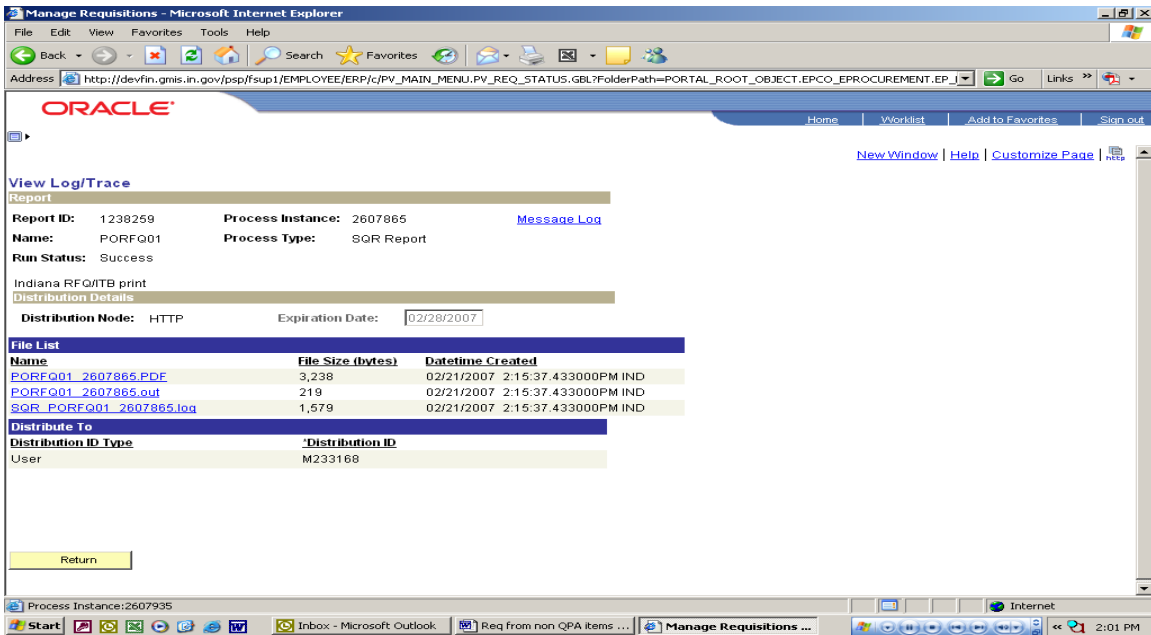
The screenshot shows the Oracle Manage Requisitions interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, there are links for 'New Window', 'Help', and 'Customize Page'. The main content area has a 'Process List' tab selected. Underneath, 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 is displayed below, with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains four rows of data. The first row is highlighted. Three arrows point to the 'Run Status' and 'Distribution Status' columns of the first row.

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			
<input type="checkbox"/>	2607863		SQR Report	PORQ010	M233168	02/21/2007 2:07:58PM IND	Success	Posted	Details

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 if your requisition is under your streamline delegation, see the user guide titled: RFQ Process, otherwise send completed requisition to IDOA Procurement to complete the process.