CREATING A REQUISITION FOR NON-QPA GOODS & SERVICES

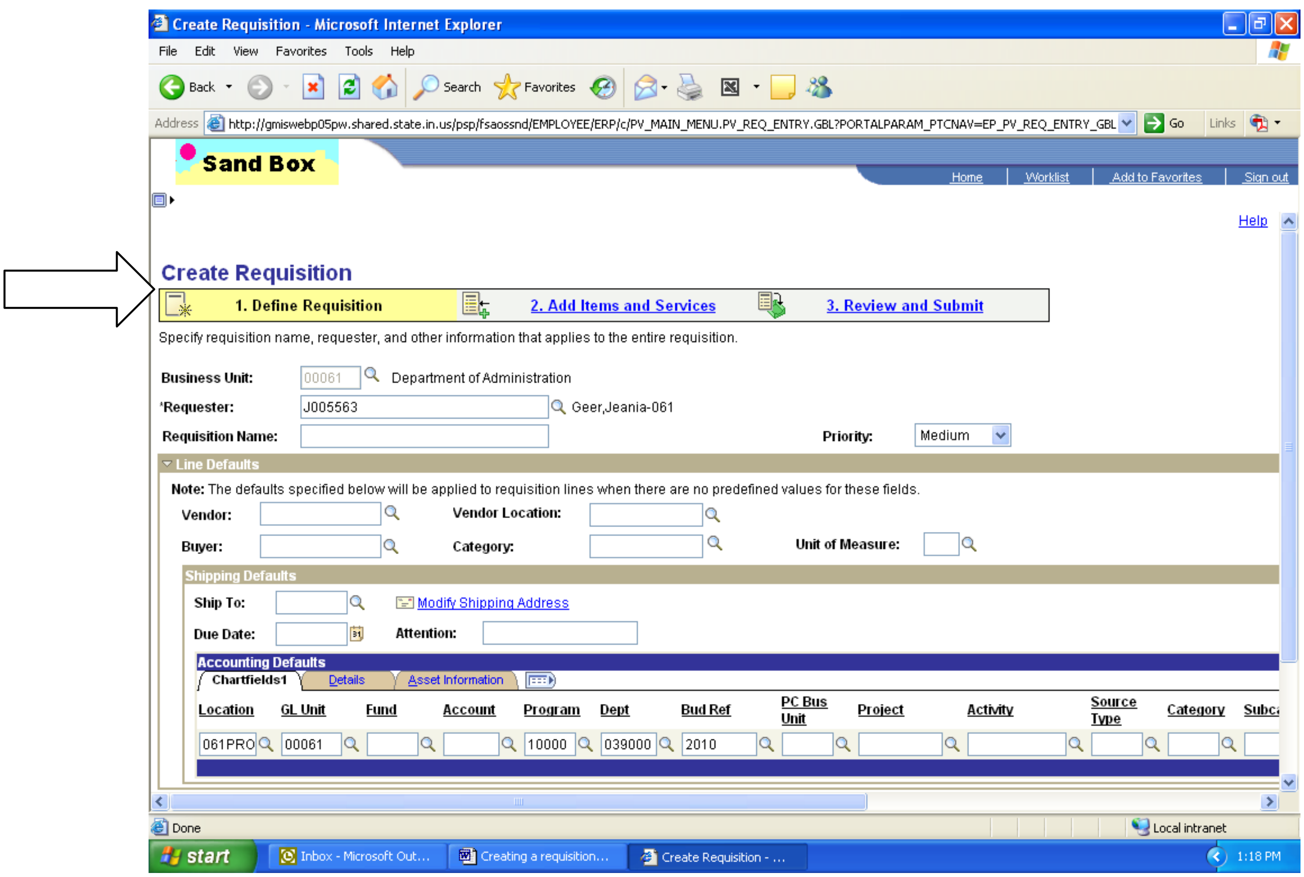
Create a "Special Request" Requisition

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**

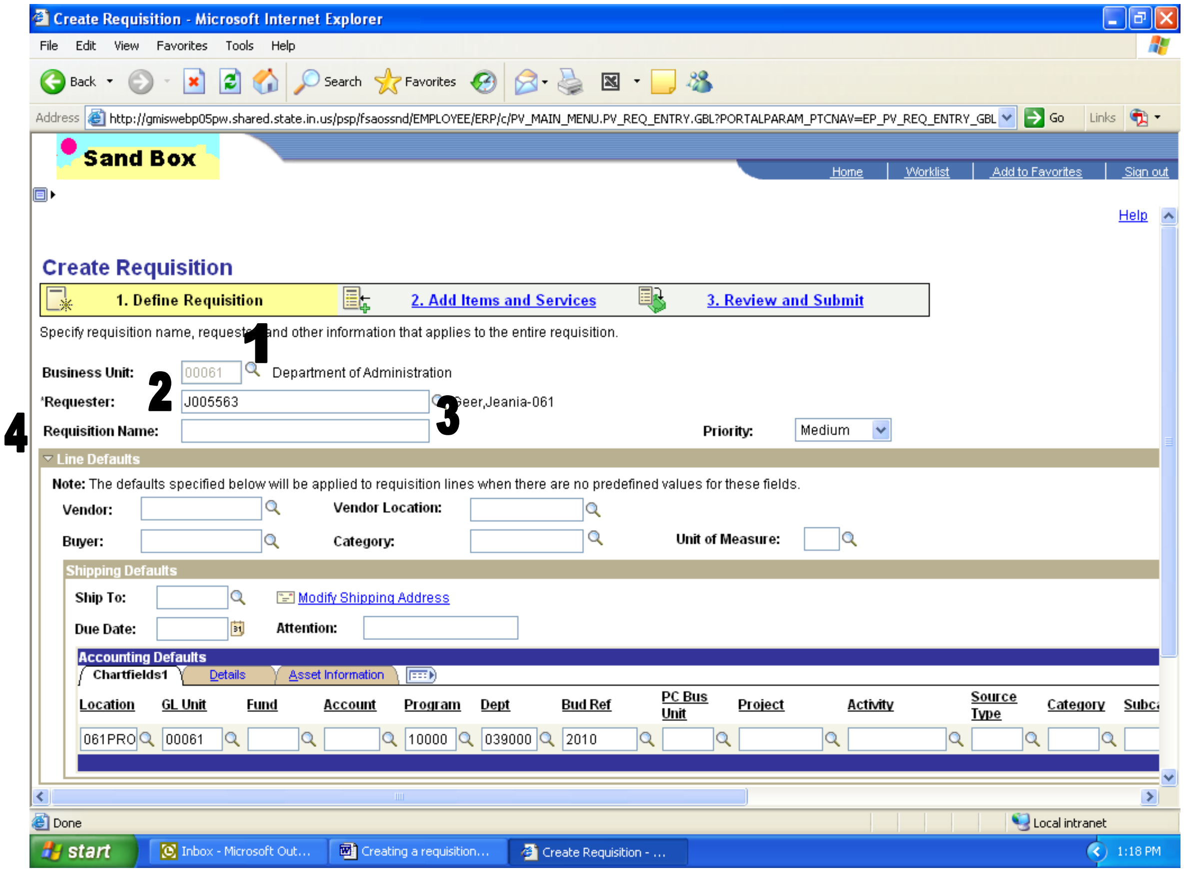
Upon navigation you will come to the screen shown below. Notice that the step of process of creating a requisition is noted in yellow.



Define Requisition

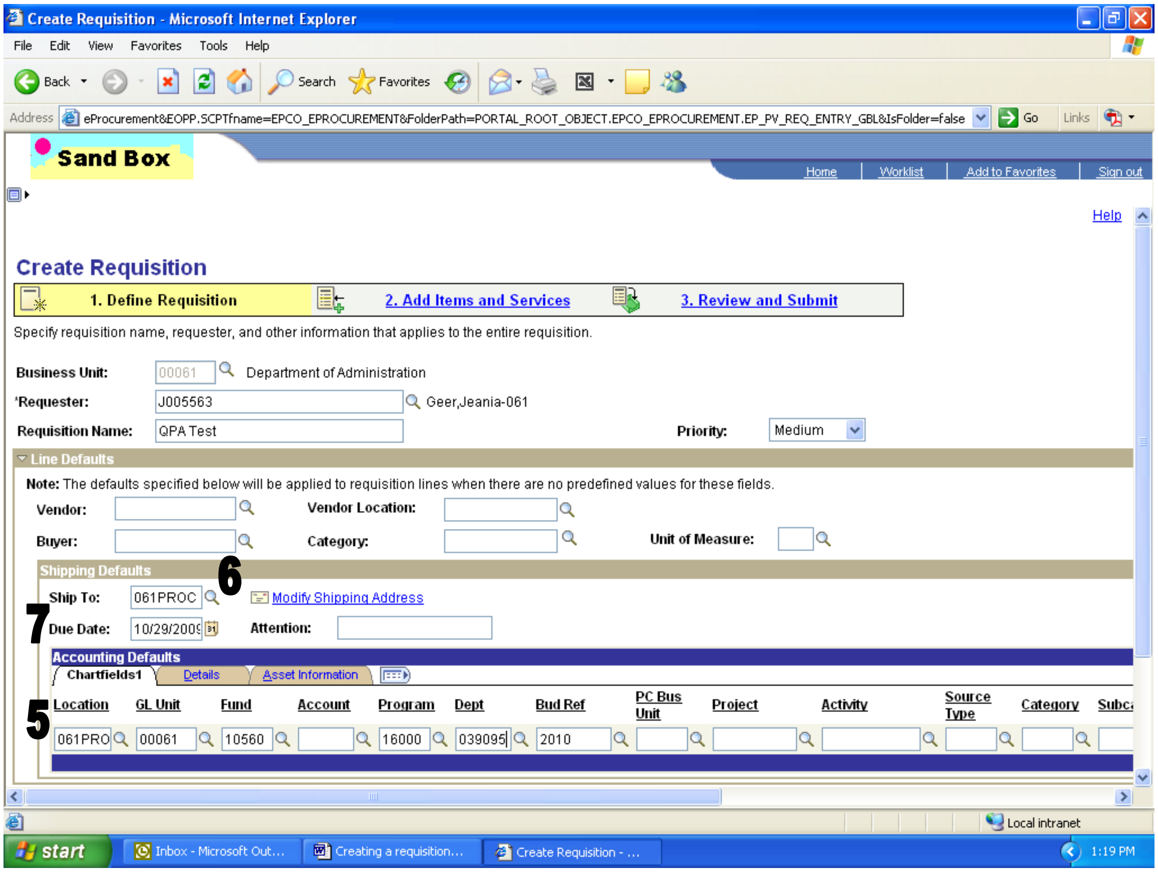
At the Define Requisition screen you are able to change or add several fields:

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



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

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

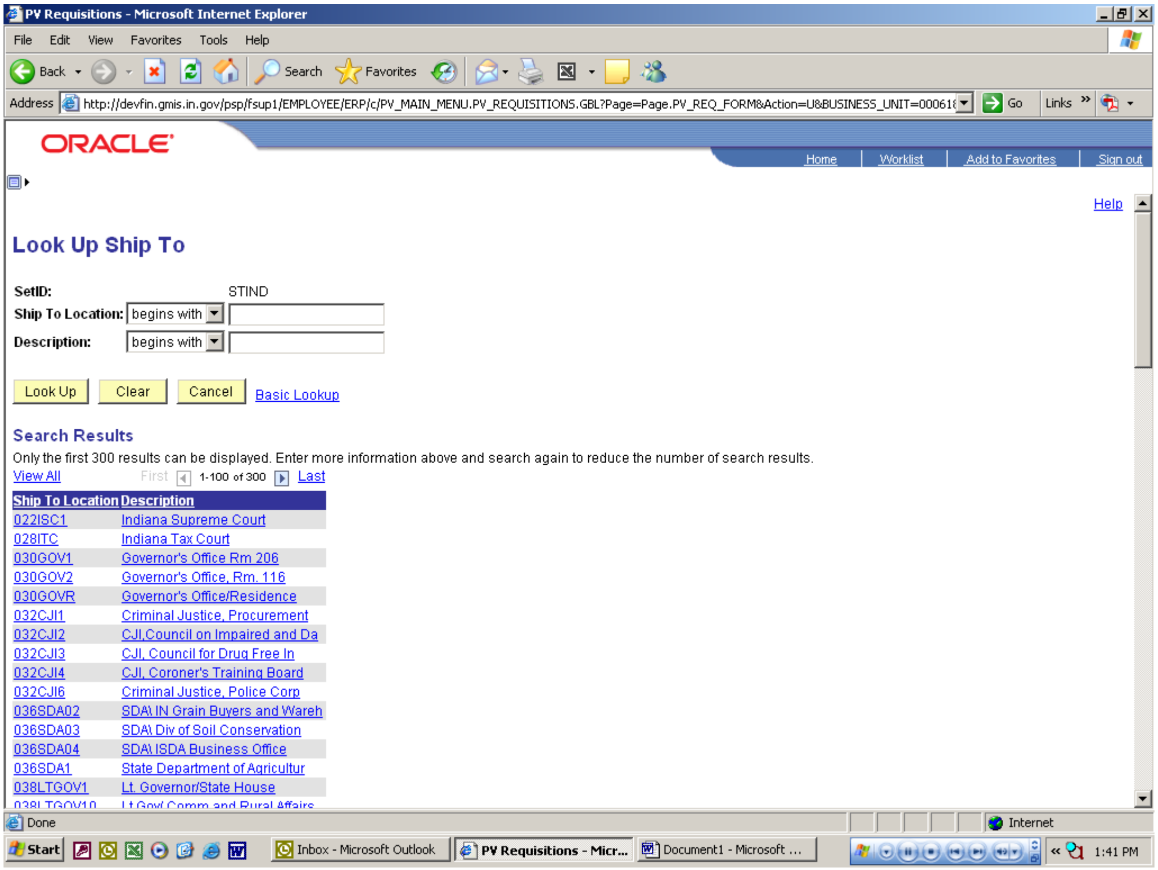


5. Accounting Defaults (Chartfields)

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

6. Ship To Location

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.



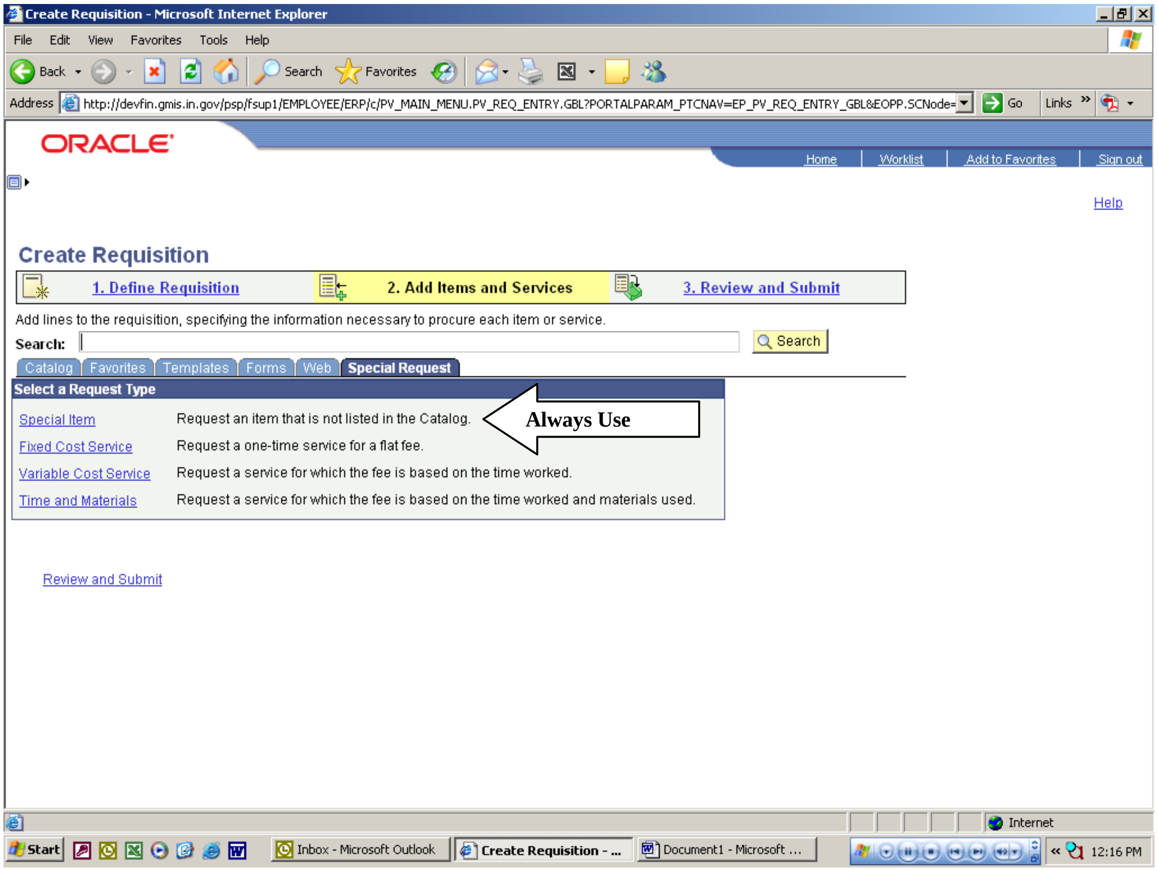
7. Due Date (not required field)

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

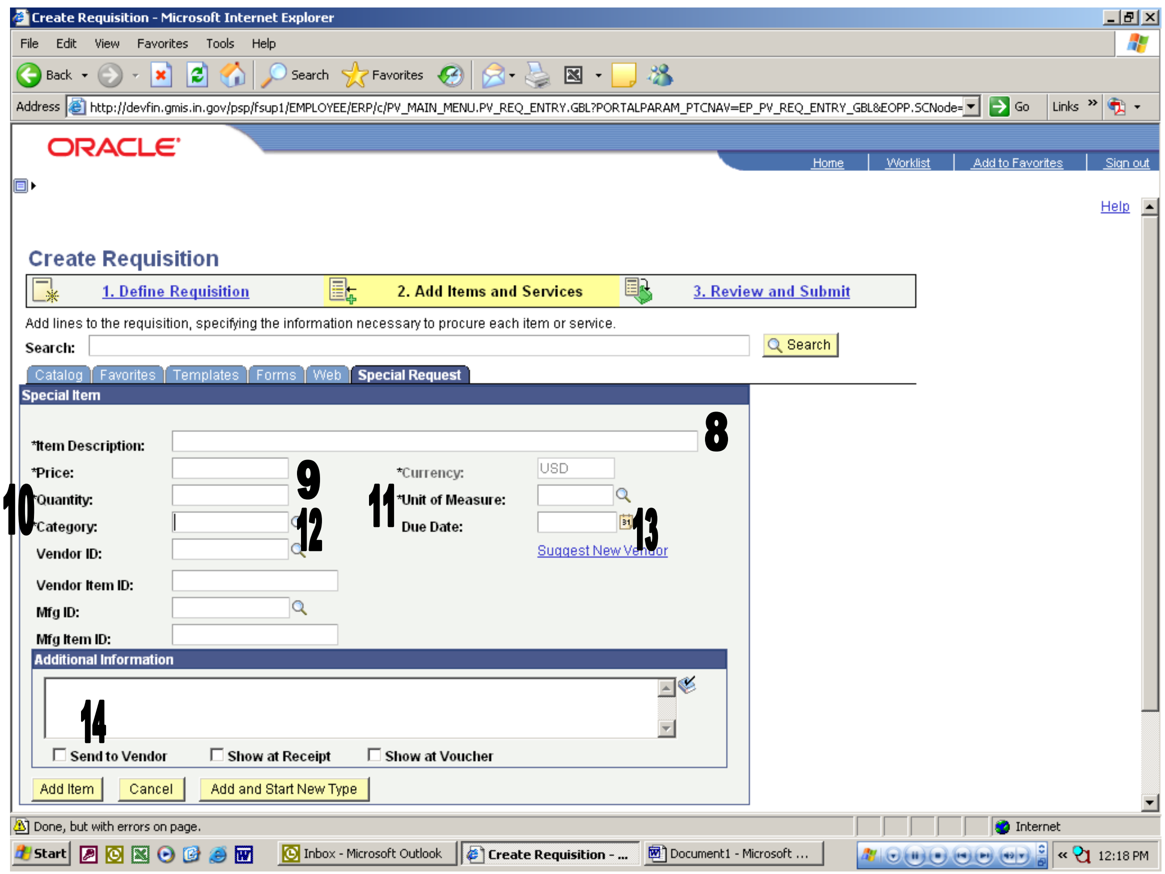
Once you have gotten to the Add Items and Services screen you will need to select the tab titled Special Request. You will see the screen below allowing you to select one of four options. The only option you should use is Special Item. This option is used for both goods and services. After choosing this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



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)



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.

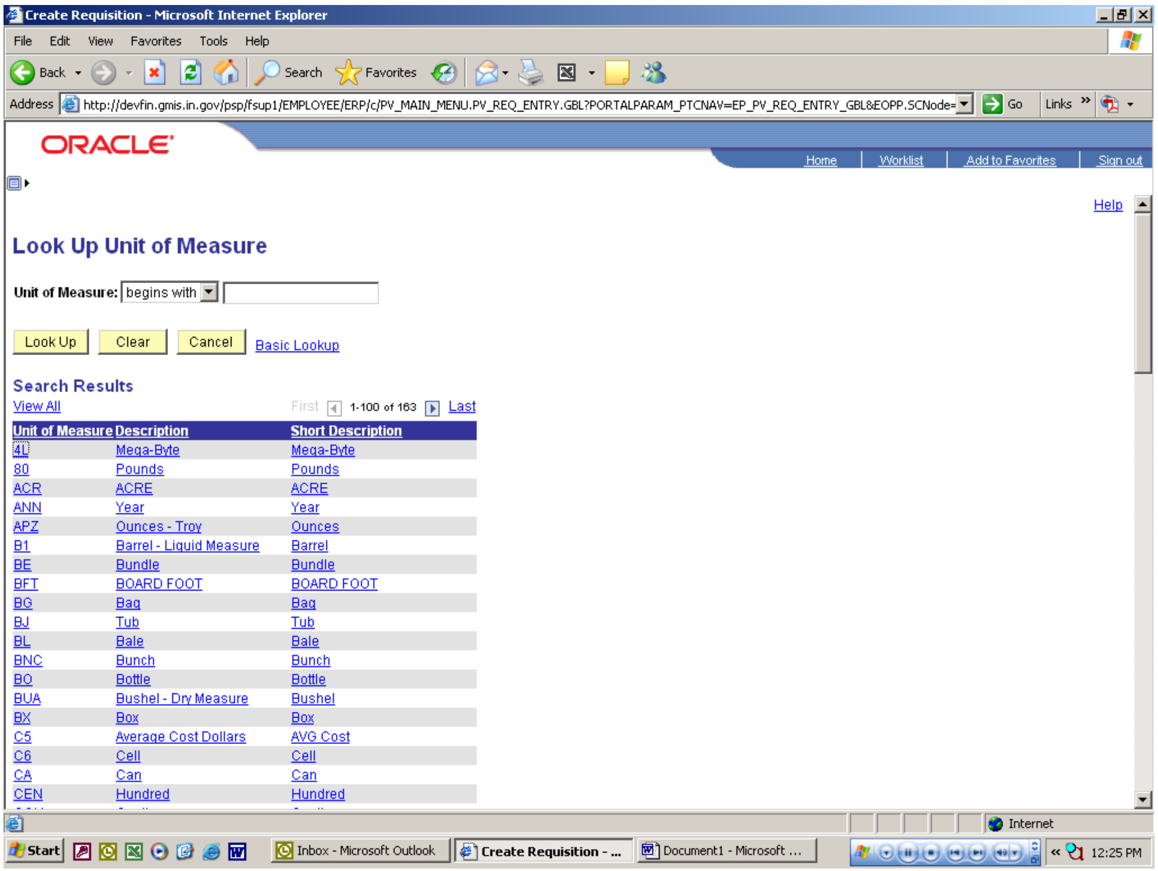
10. Quantity

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

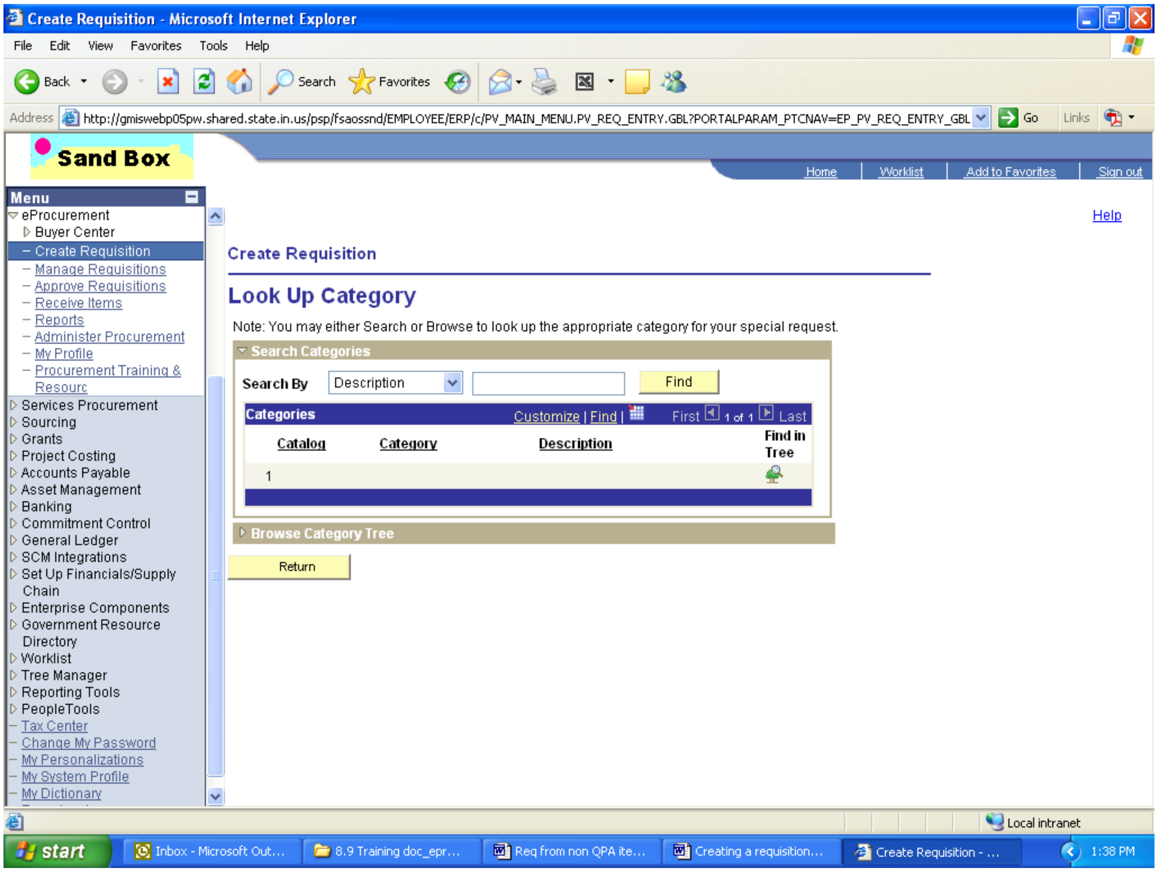
Enter the unit of measure specific to the good or service being requested.

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.

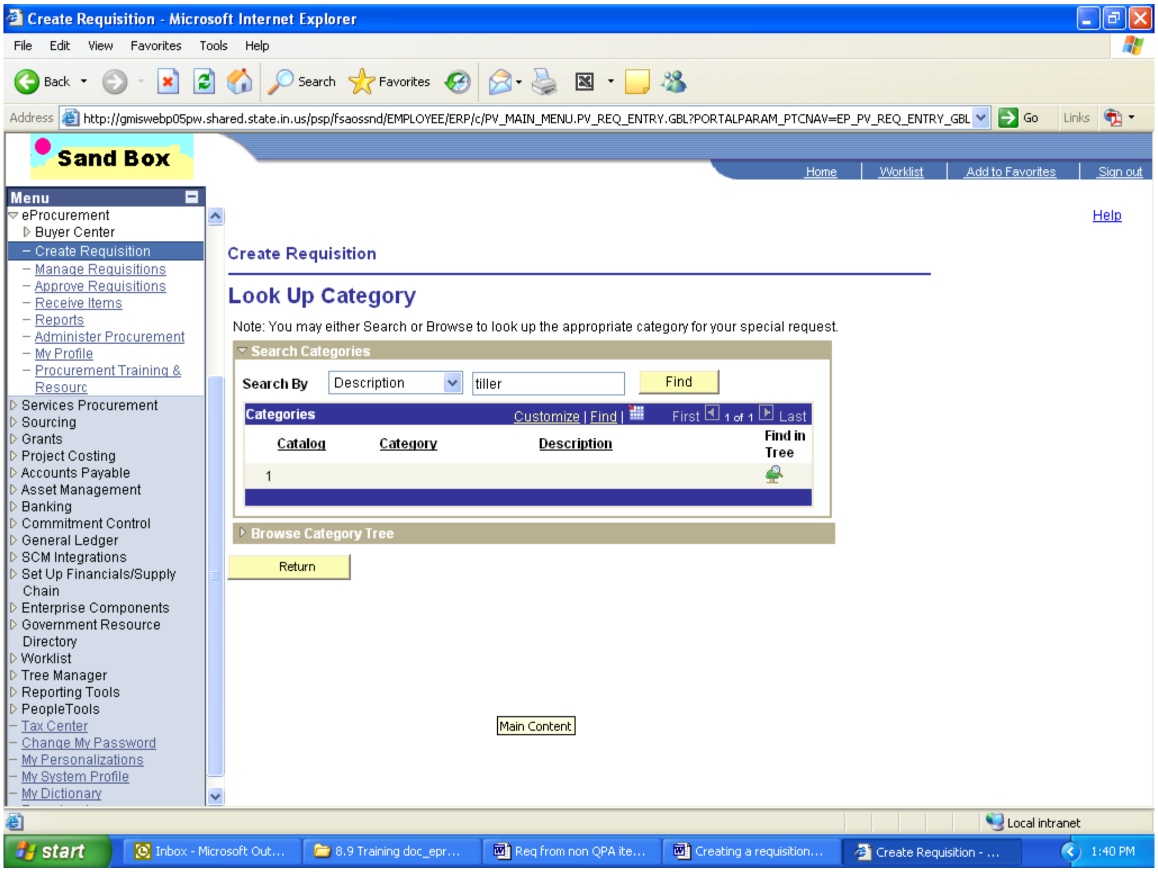


12. Category

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.



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.


Create Requisition - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address 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
Go Links
Sand Box
Home Worklist Add to Favorites Sign out
Menu
eProcurement
Buyer Center
Create Requisition
Manage Requisitions
Approve Requisitions
Receive Items
Reports
Administer Procurement
My Profile
Procurement Training & Resourc
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
Help
Create Requisition
Look Up Category
Note: You may either Search or Browse to look up the appropriate category for your special request.
Search Categories
Search By
Description
tiller
Find
Categories
Customize | Find |
First 1 of 1 Last
Catalog
Category
Description
Find in Tree
1
Browse Category Tree
Return
Main Content
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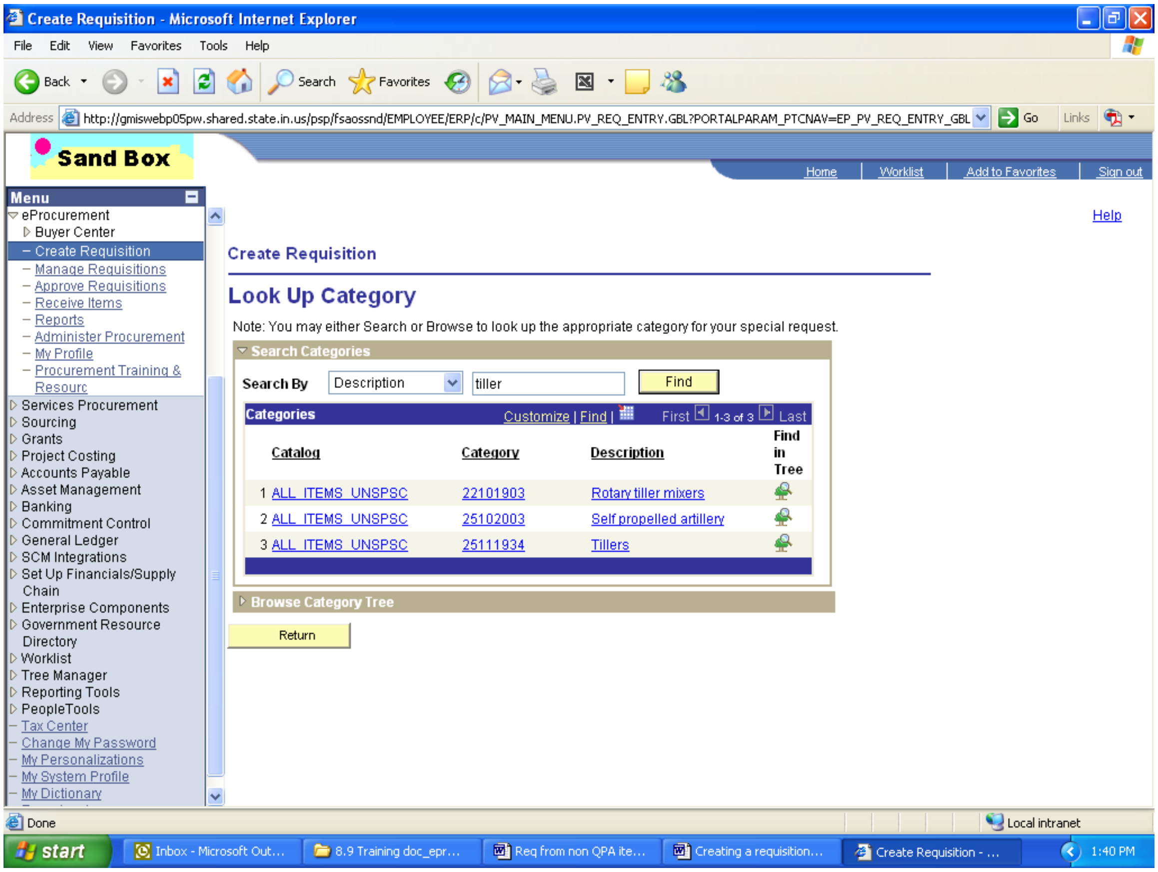
start
Inbox - Microsoft Out...
8.9 Training doc_epr...
Req from non QPA ite...
Creating a requisition...
Create Requisition - ...
1:40 PM



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.

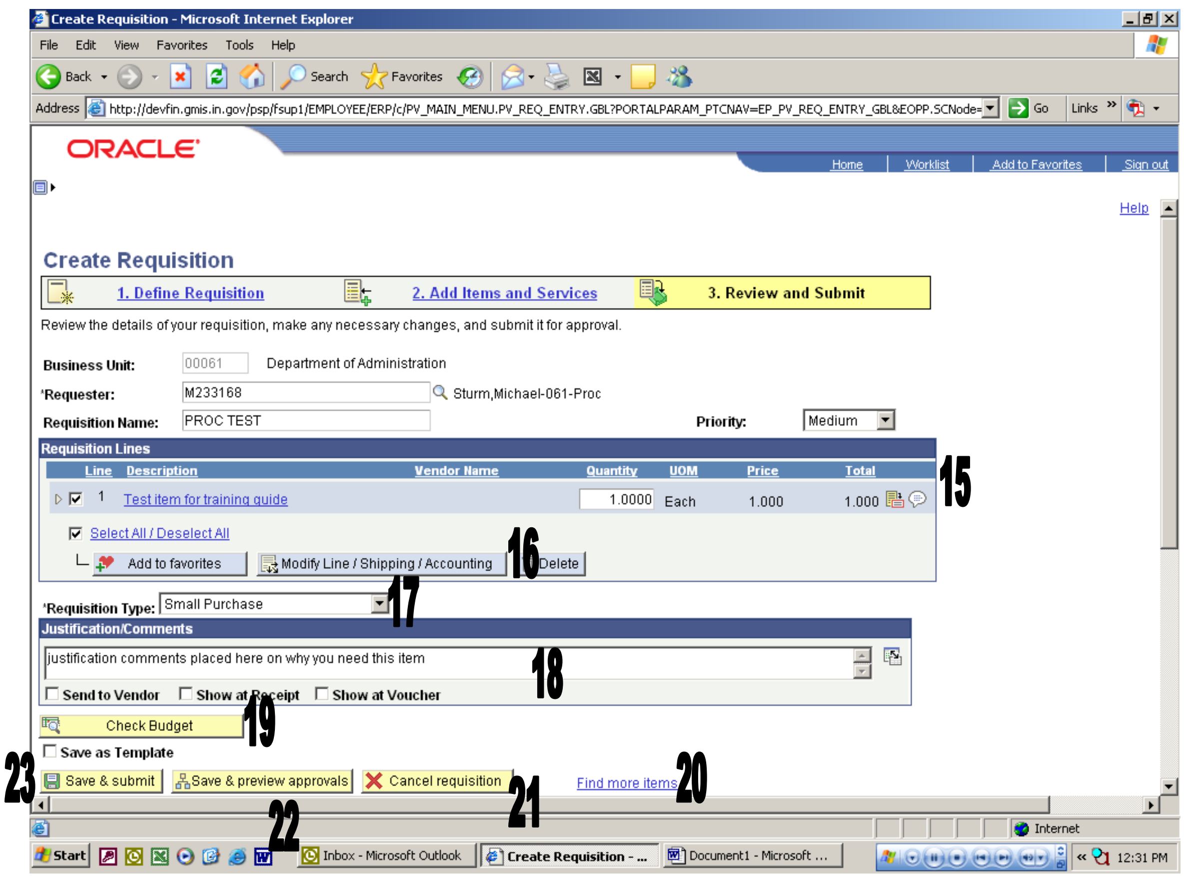
Once all the items have been added to your requisition you will need to click on the Review and Submit link to: review all information, make changes, budget check, save and submit the requisition to the approval workflow.

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.

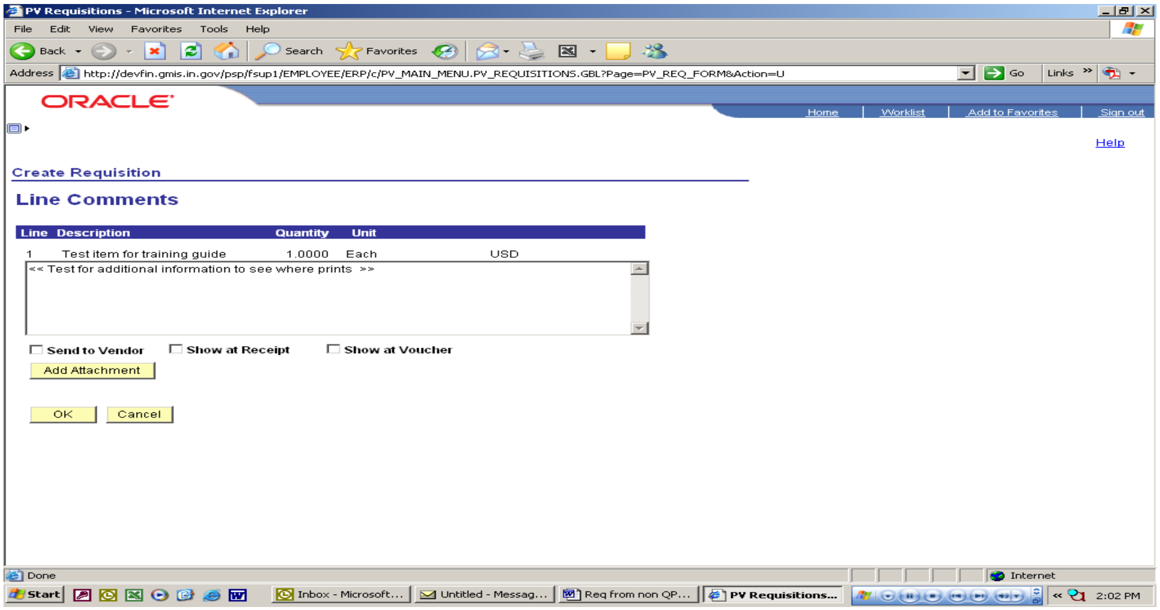
These tasks include:

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



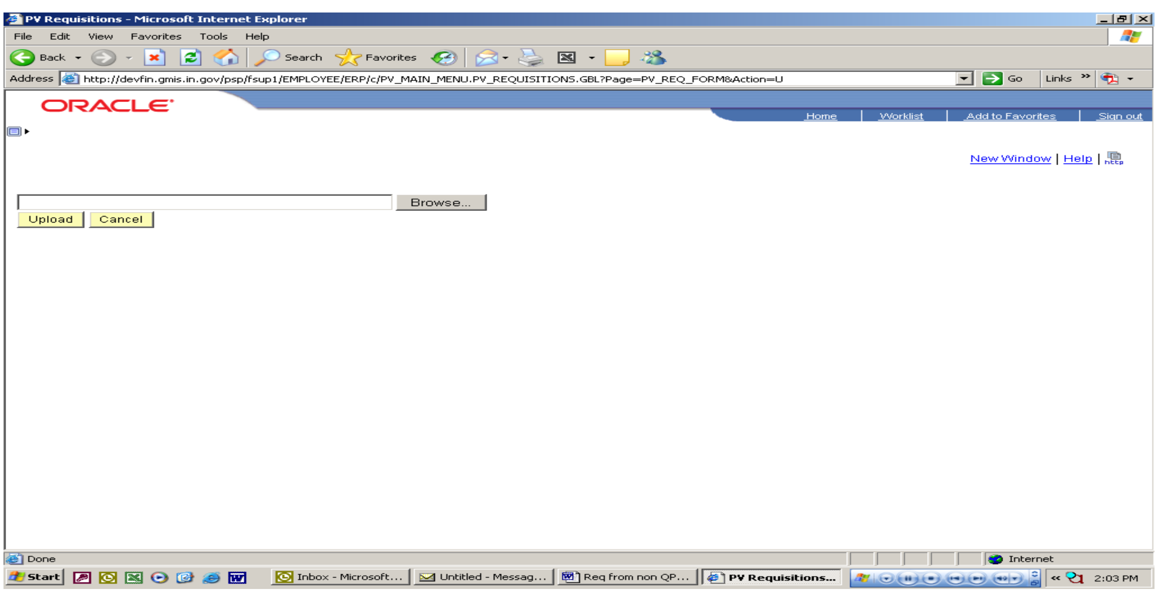
15. Adding Line Comments

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.

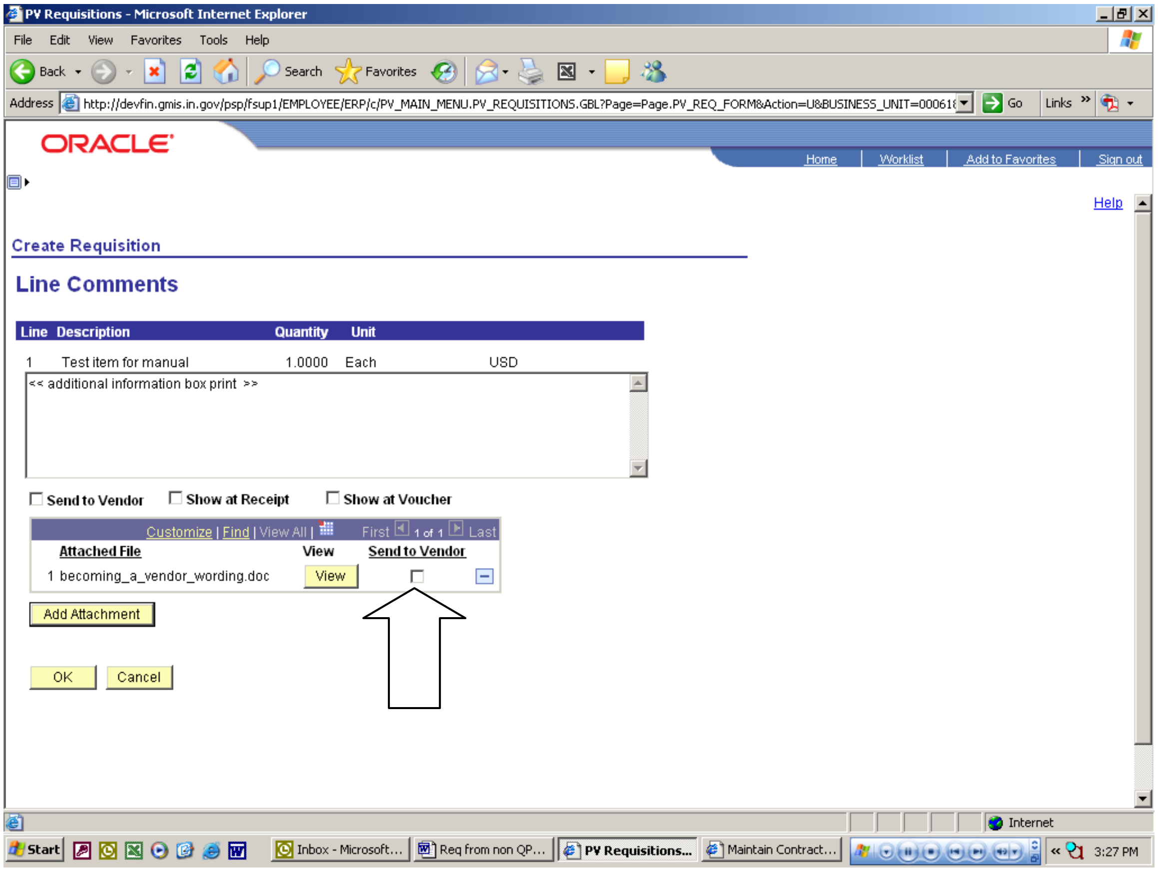


If you need to add attachments to the requisition

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.

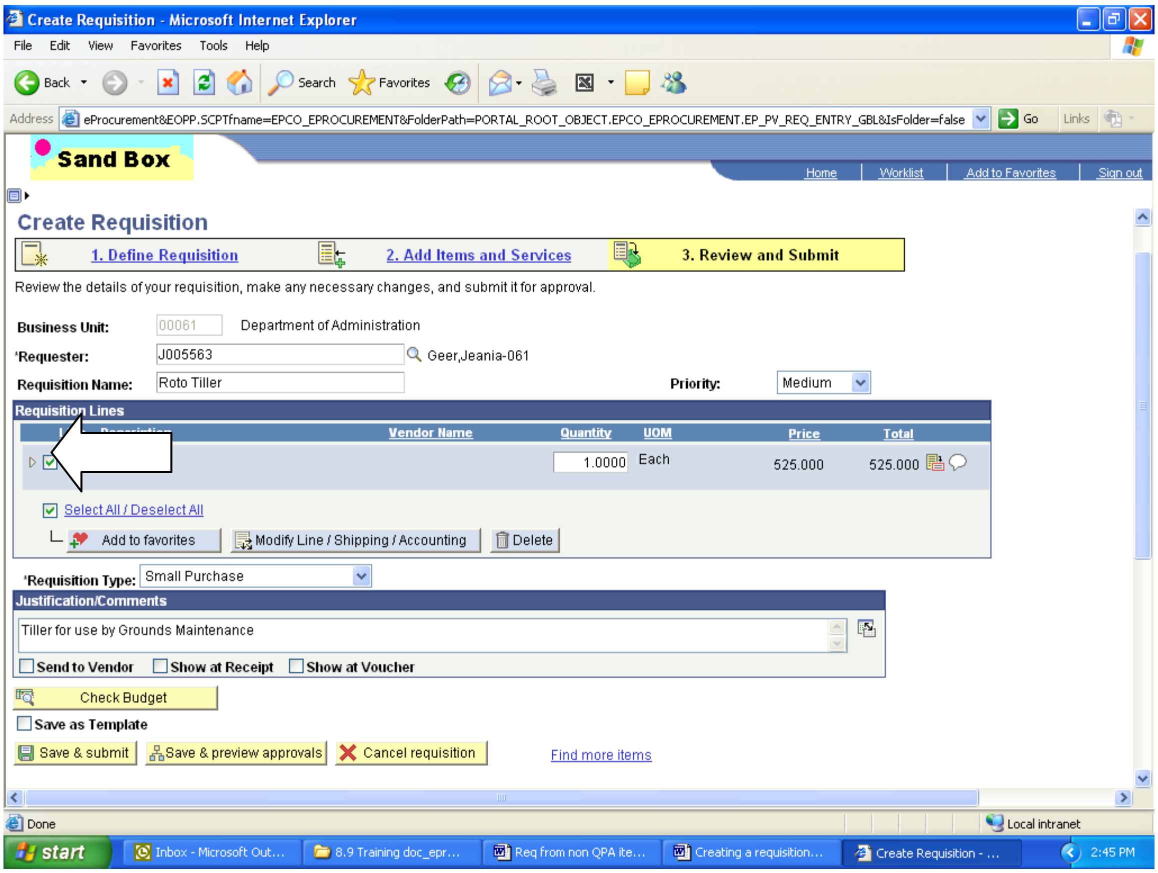


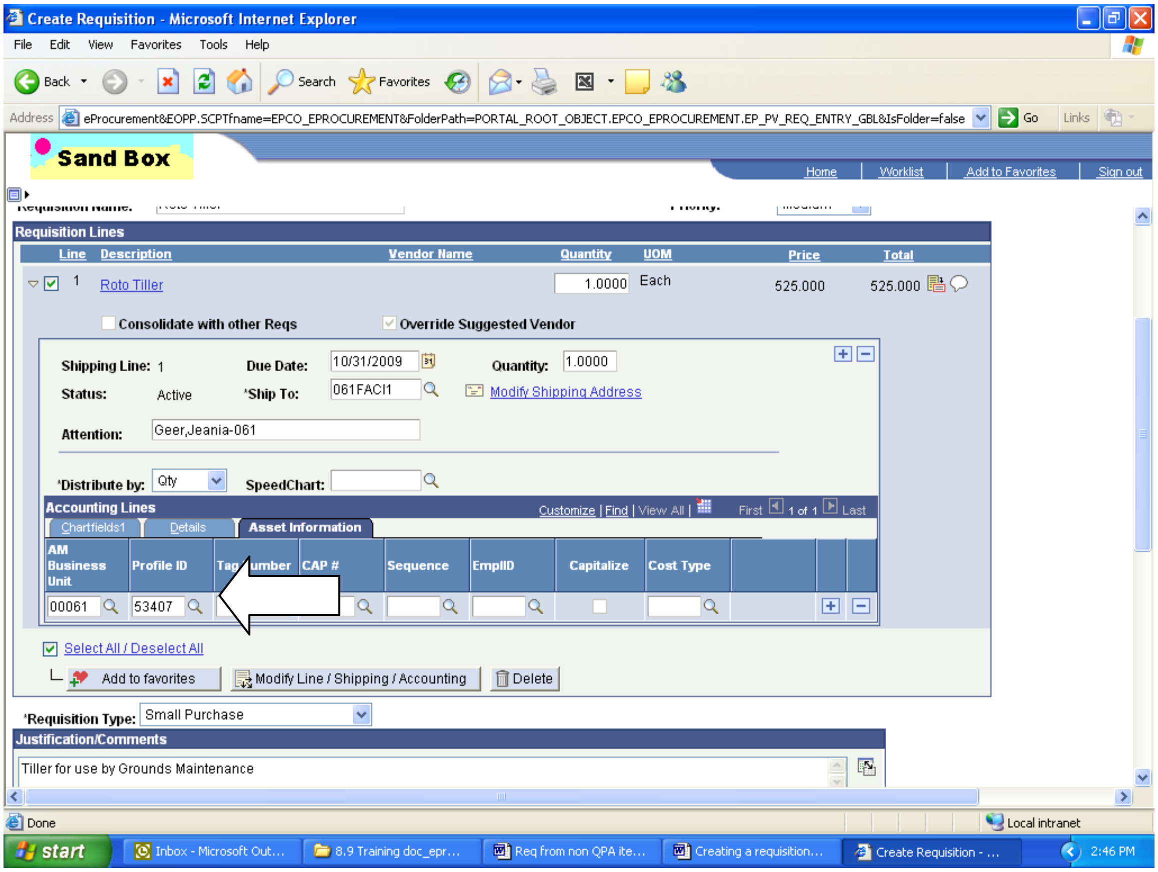
Once you have uploaded the file you will be returned to this screen. This screen shows you the file as an attachment to the requisition. If you are done and do not want the attachment sent to the vendor or added to the RFQ or Purchase Order, you do not need to check the Send to Vendor box for the attachment. 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.





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.

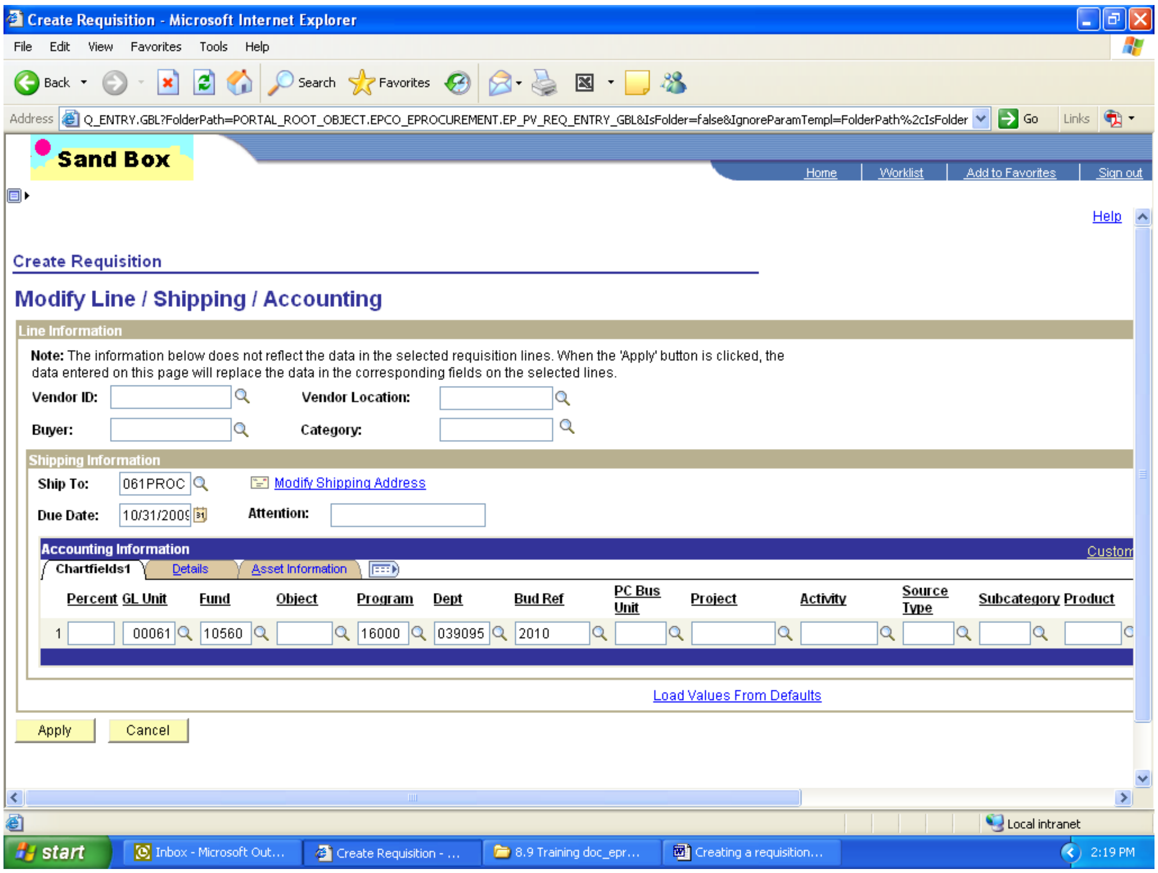
If a Requisitioner does not want an item to remain an asset, then he/she should remove the AM Business Unit and Profile ID on each line of the requisition (as needed). The Requisitioner can also make an item an asset that is not automatically set as one (through the UNSPSC code chosen) by adding the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

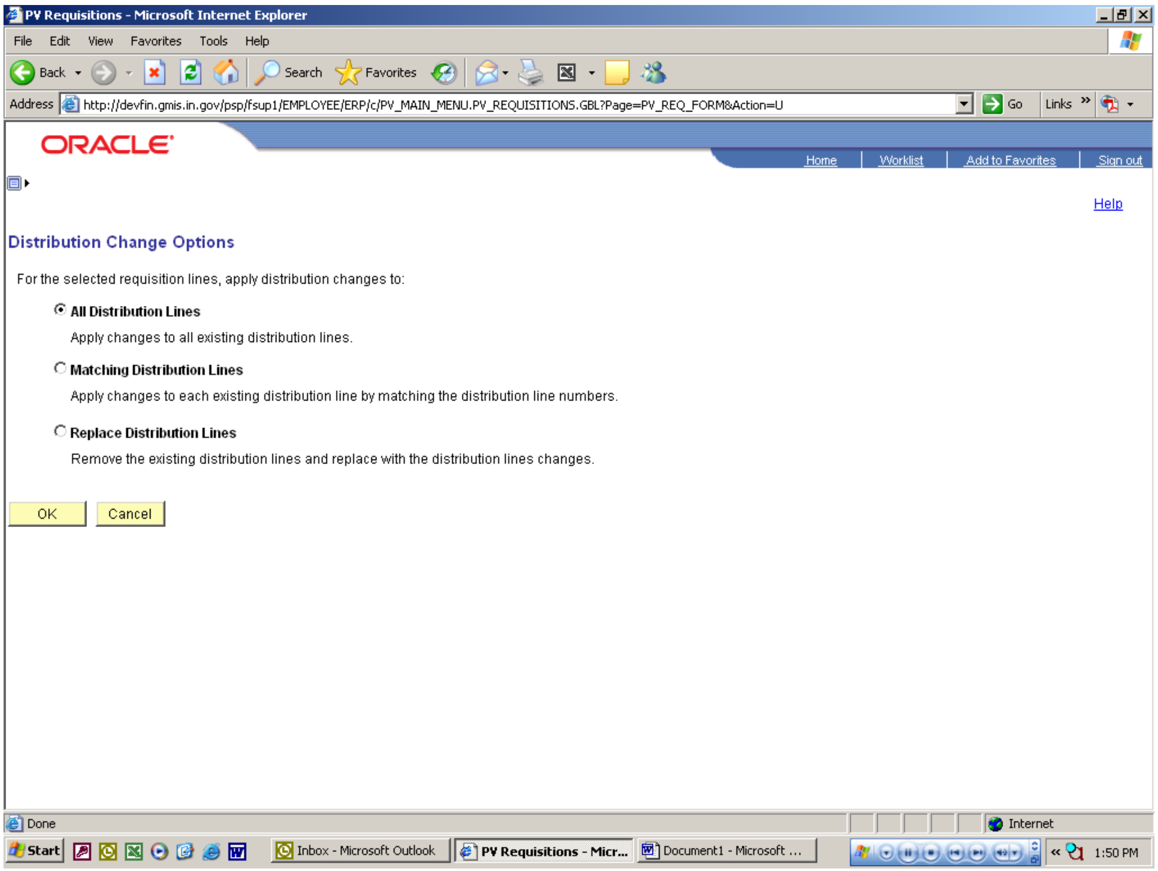
This is where you can add multiple distribution lines on the requisition by clicking the plus button at the end of the first row.



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.

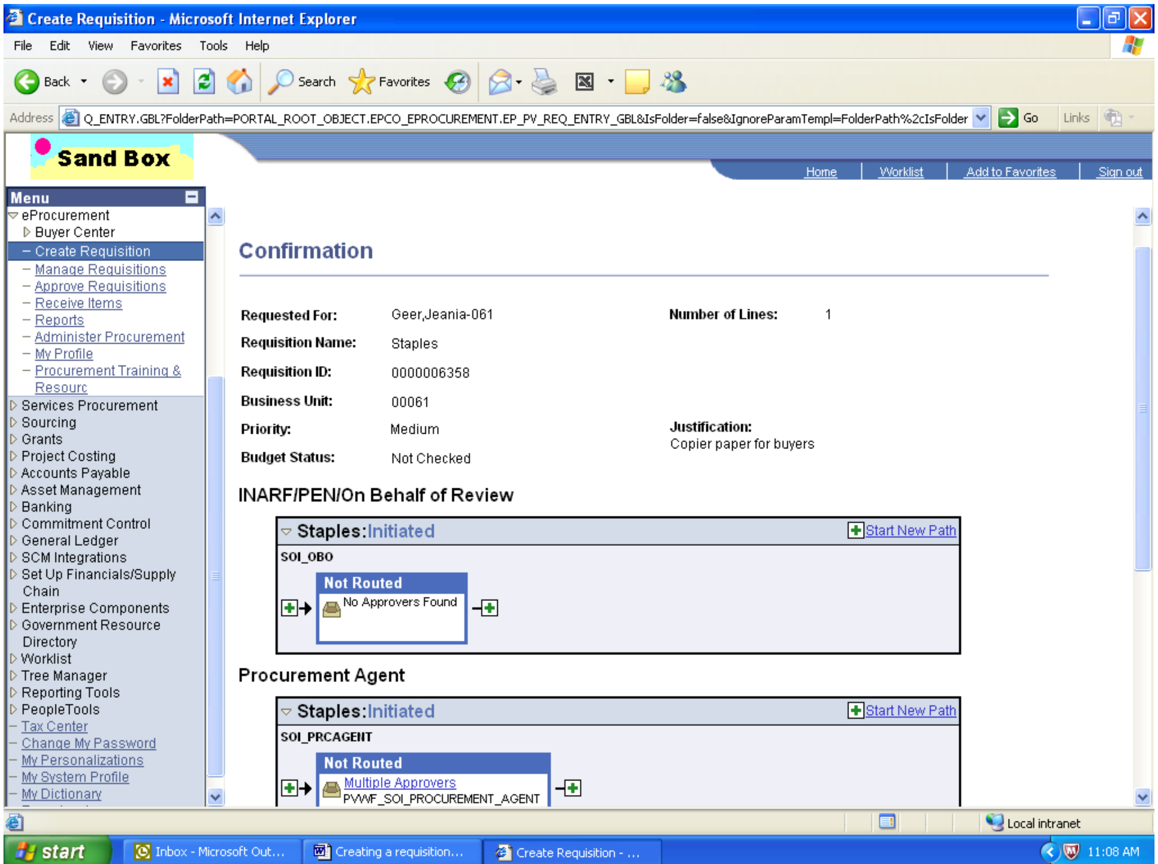
21. Cancel requisition

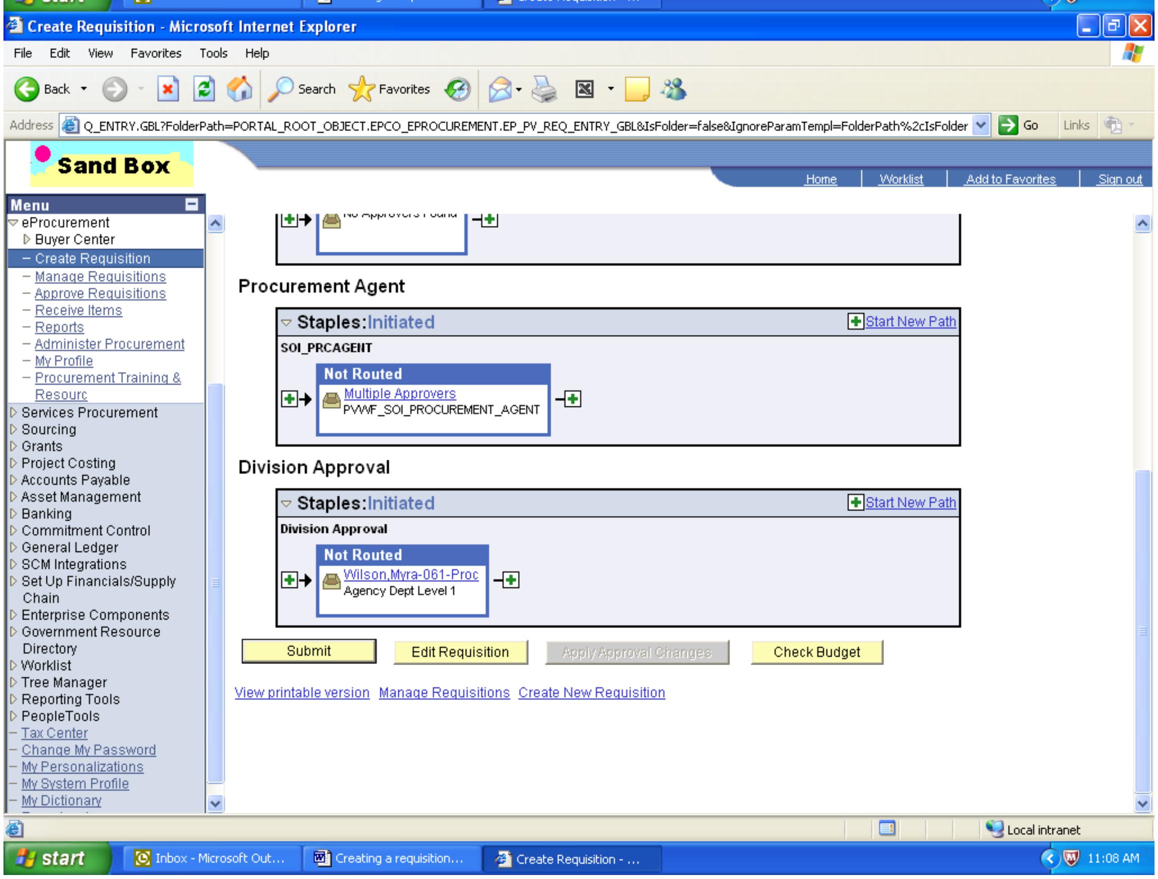
Clicking the Cancel requisition button before saving or submitting will remove the information about the requisition being created from the system. If you have saved the requisition, you will only cancel the changes to the requisition if there are any. To cancel the requisition if previously saved, you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


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


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

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.

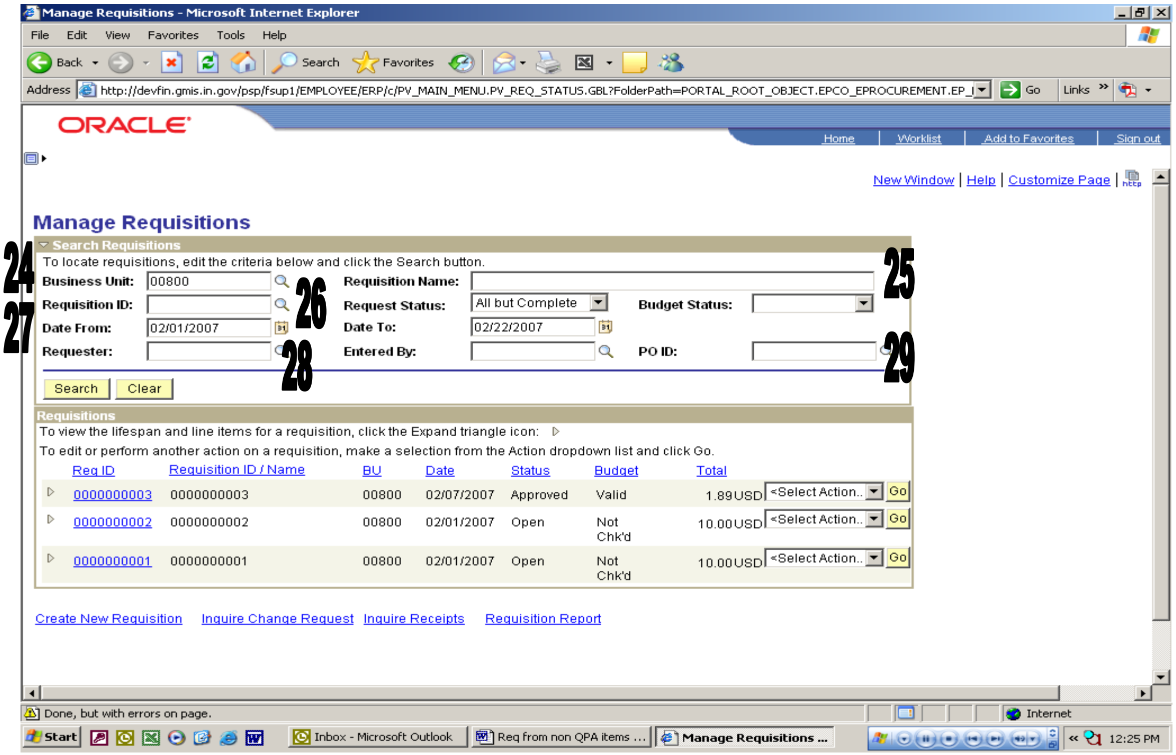
Menu Navigation:

- **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:

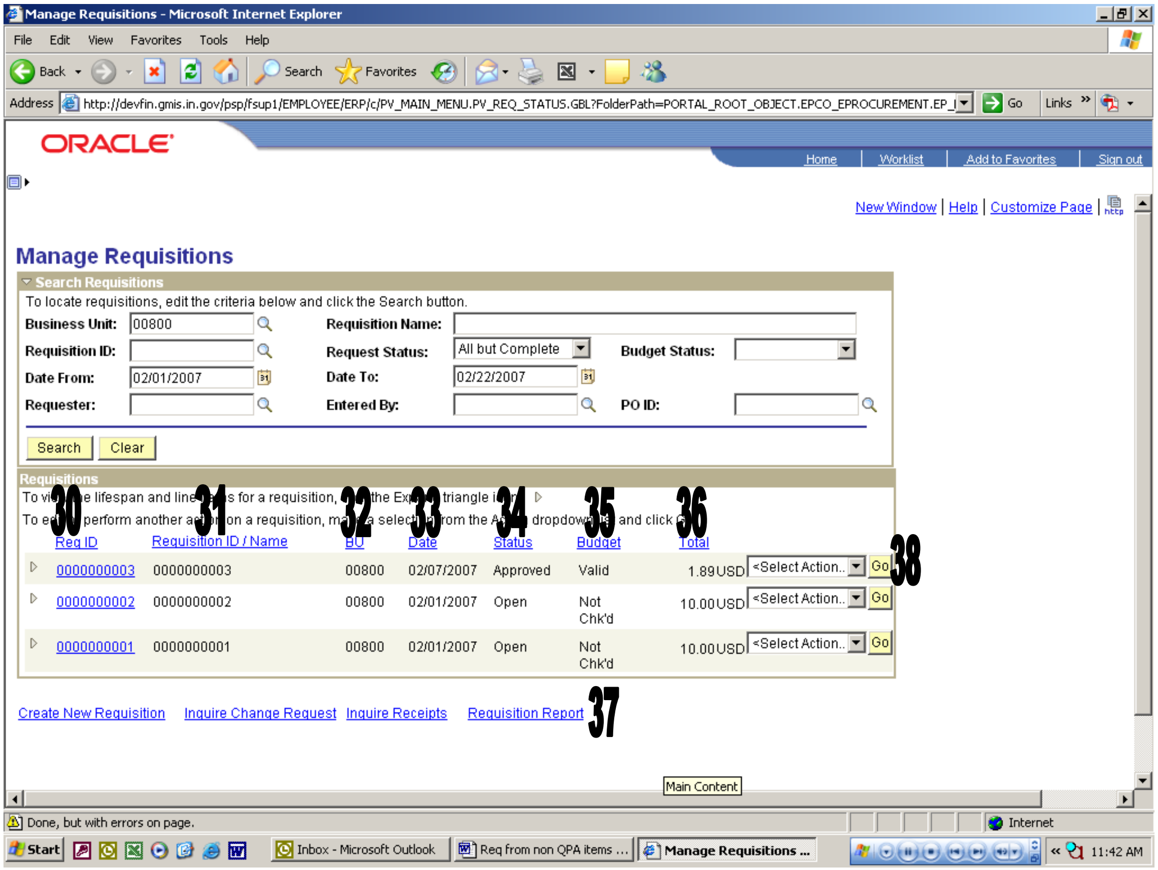
24. Business Unit
25. Requisition Name
26. Requisition ID
27. Date range
28. Requestor
29. PO ID



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:

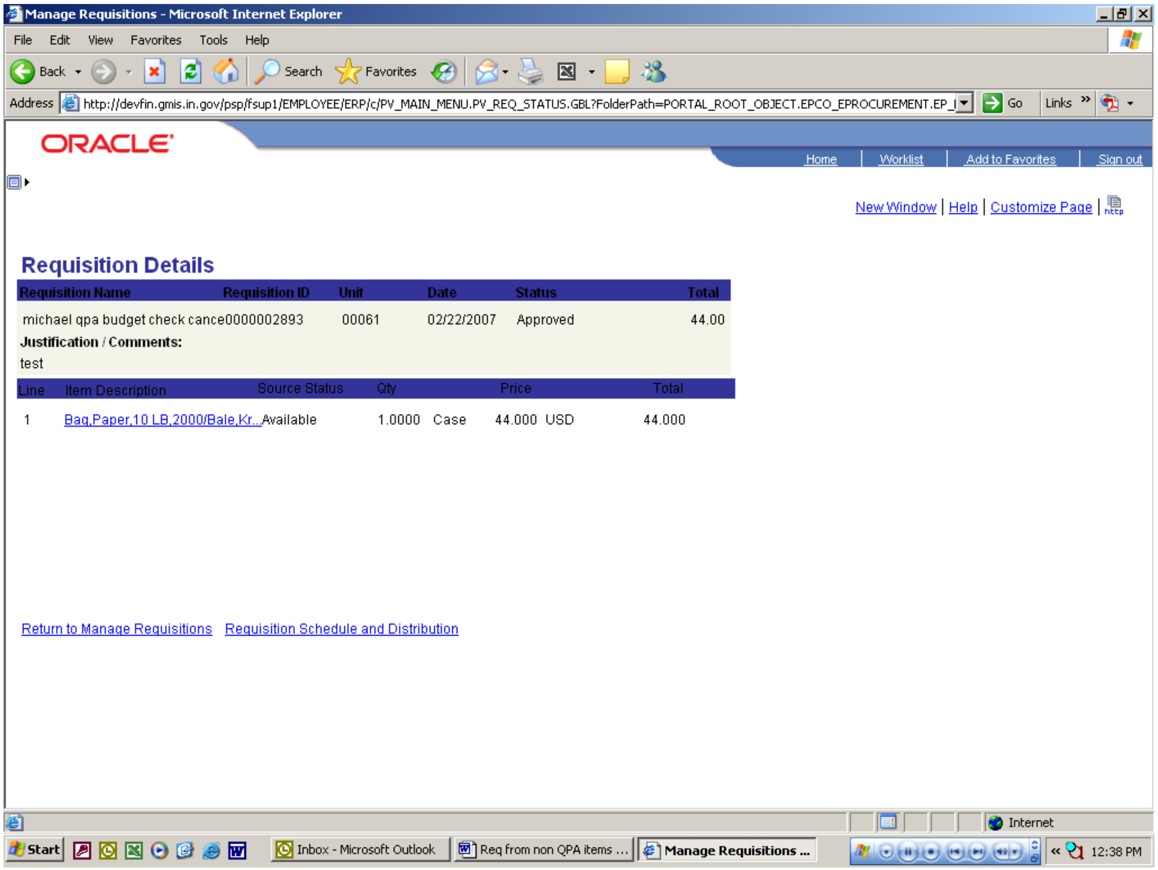
30. Req ID
31. Requisition ID/Name
32. BU (Business unit)
33. Date
34. Status
35. Budget
36. Total
37. Requisition report
38. Additional actions that can be completed on requisition

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


Manage Requisitions - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://devfin.gmis.in.gov/psp/fsup1/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 | 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
30
31
32
33
34
35
36
Req ID
Requisition ID / Name
BU
Date
Status
Budget
Total
0000000003 0000000003 00800 02/07/2007 Approved Valid 1.89USD <Select Action.. Go
38
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
37
Main Content
Done, but with errors on page.
Internet
Start
Inbox - Microsoft Outlook
Req from non QPA items ...
Manage Requisitions ...
11:42 AM

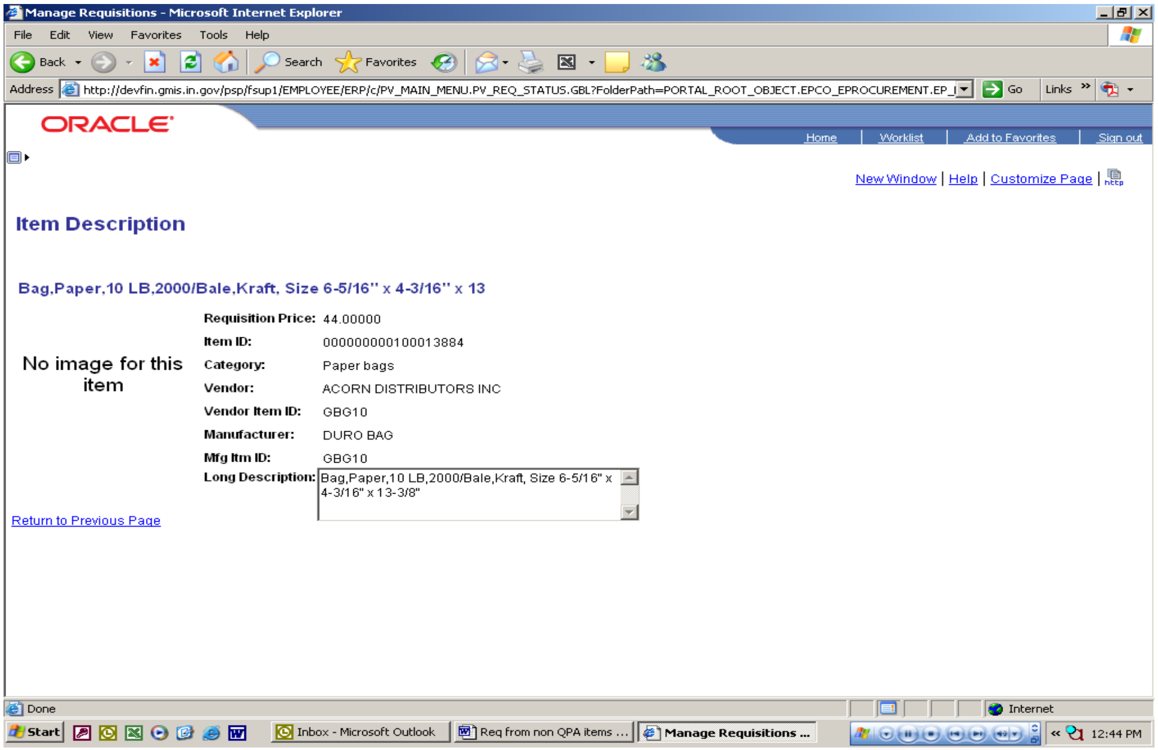
30. Req ID

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.

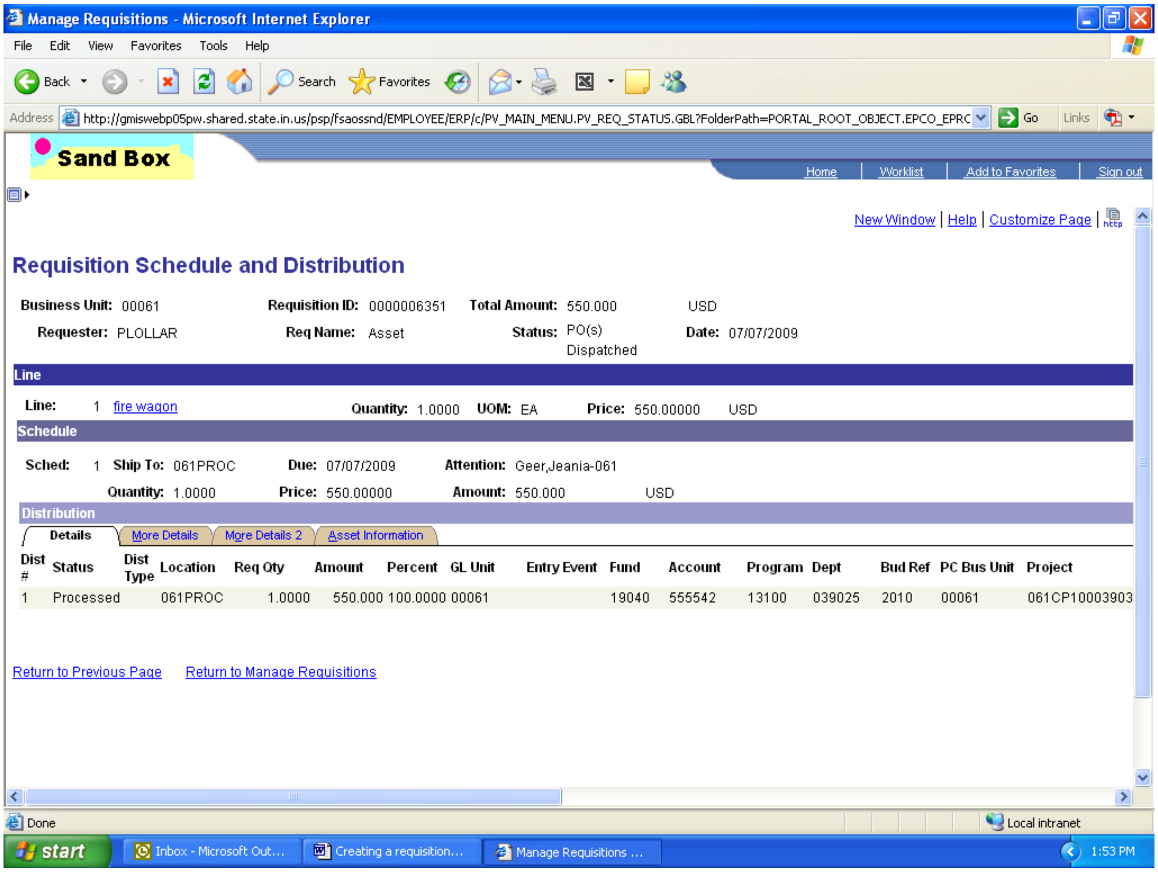


From the requisition details screen you can also view details about the line items and the schedule and distribution for the requisition lines. To review the detailed information click the blue link to review. The following screens show more detail as to what will be seen.

Item Description Screen



Requisition Schedule and Distribution Screen


Manage Requisitions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://gmiswebp05pw.shared.state.in.us/psp/fsaossnd/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_STATUS.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_EPRC

Sand Box

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Requisition Schedule and Distribution

Business Unit: 00061 Requisition ID: 0000006351 Total Amount: 550.000 USD

Requester: PLOLLAR Req Name: Asset Status: PO(s) Dispatched Date: 07/07/2009

Line

Line: 1 fire wagon Quantity: 1.0000 UOM: EA Price: 550.00000 USD

Schedule

Sched: 1 Ship To: 061PROC Due: 07/07/2009 Attention: Geer,Jeania-061

Quantity: 1.0000 Price: 550.00000 Amount: 550.000 USD

Distribution

Details | More Details | More Details 2 | Asset Information

Dist #	Status	Dist Type	Location	Req Qty	Amount	Percent	GL Unit	Entry Event	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit	Project
1	Processed		061PROC	1.0000	550.000	100.0000	00061		19040	555542	13100	039025	2010	00061	061CP10003903

Return to Previous Page   Return to Manage Requisitions

Done   Local intranet

start | Inbox - Microsoft Out... | Creating a requisition... | Manage Requisitions ... | 1:53 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.

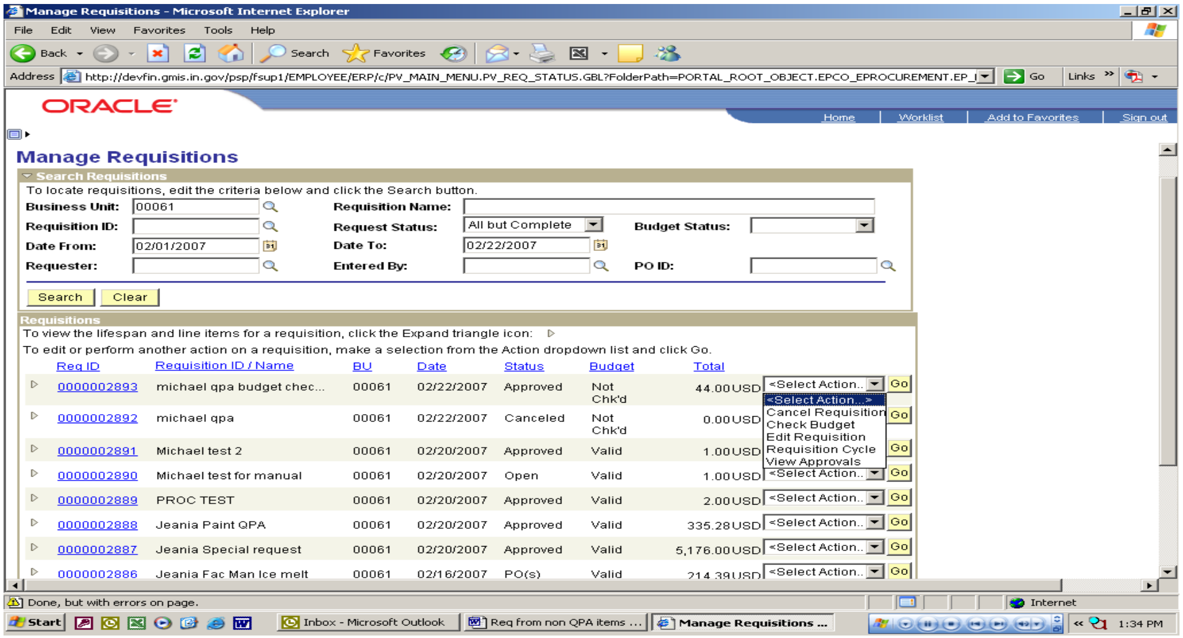
35. **Budget**
    This column shows the budget status of the requisition. Statuses of Valid, Error or Not Chk'd will be seen. In order to finish processing a requisition the budget status must be Valid.

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.

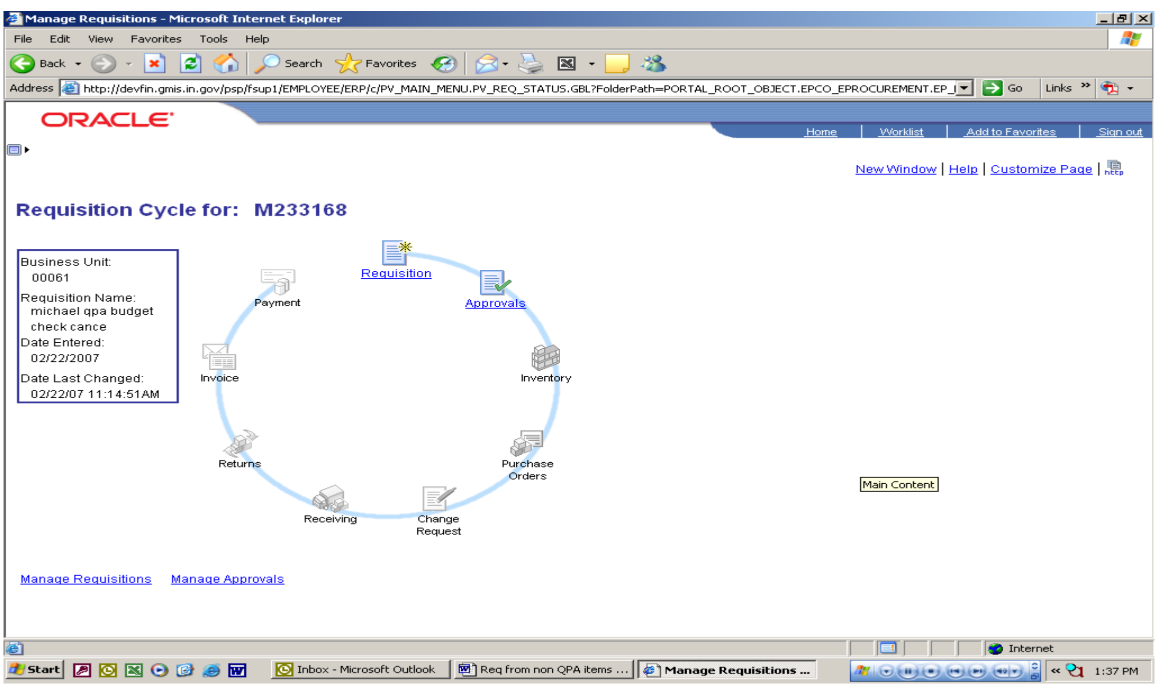
38. Additional actions that can be completed on requisition

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.



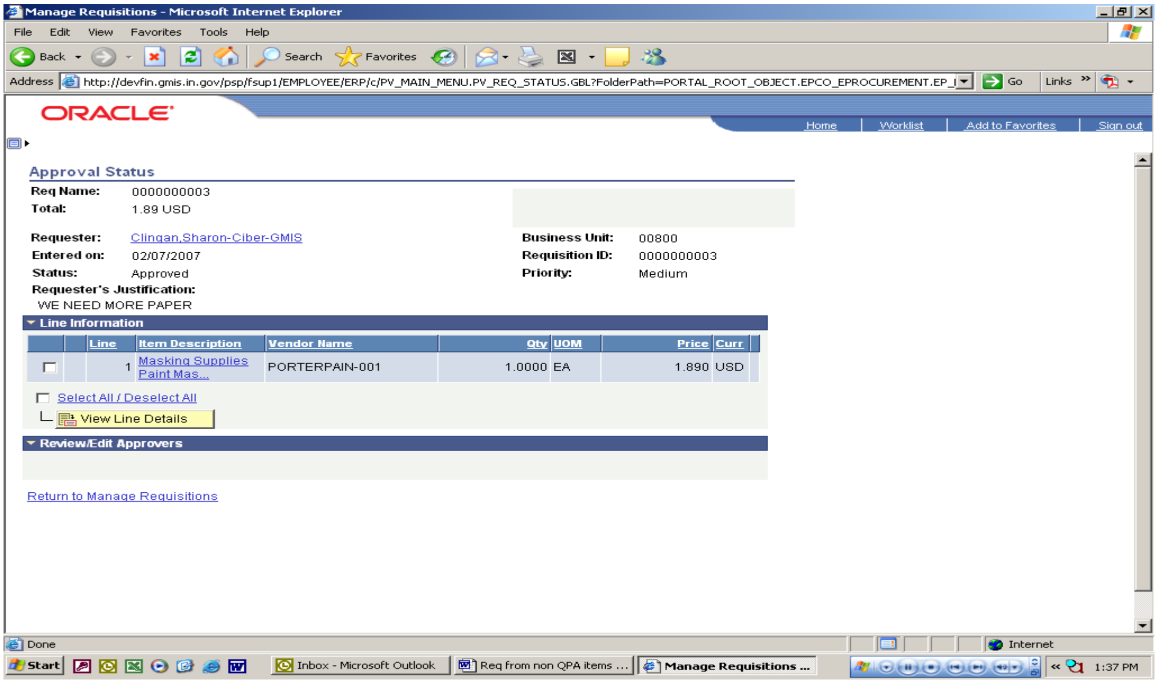
Requisition Cycle

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.

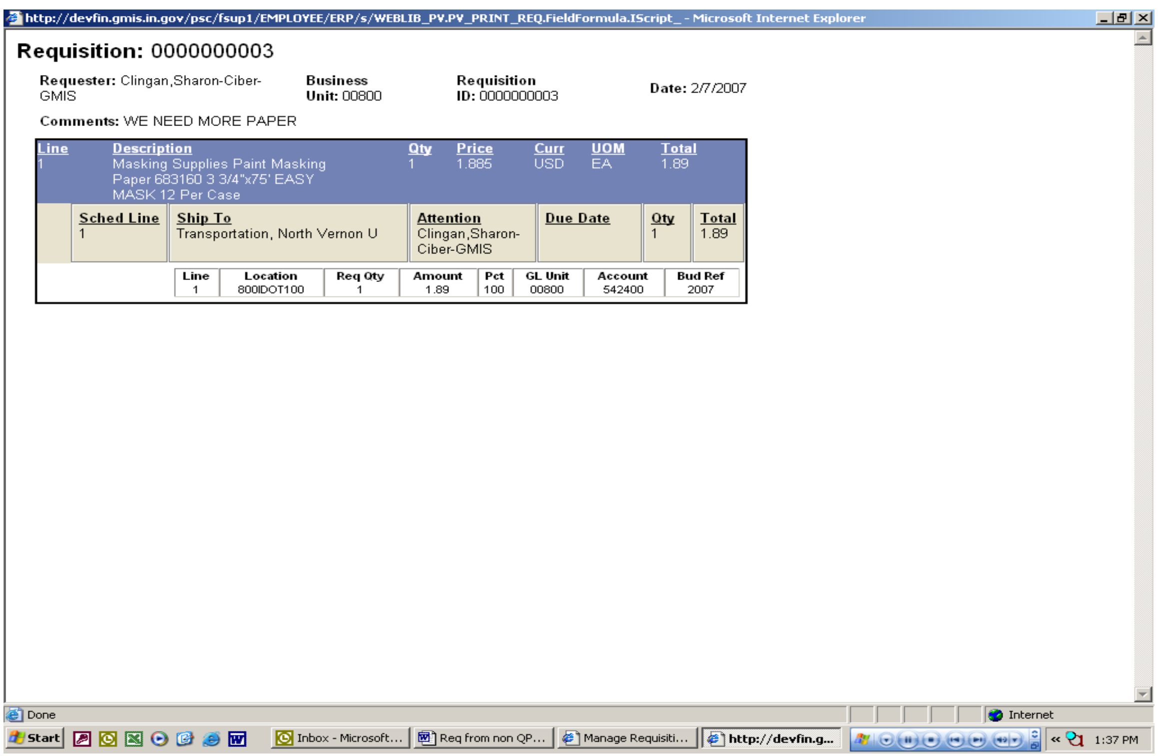


View Approvals

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.



Line Detail Screen



Budget Check

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

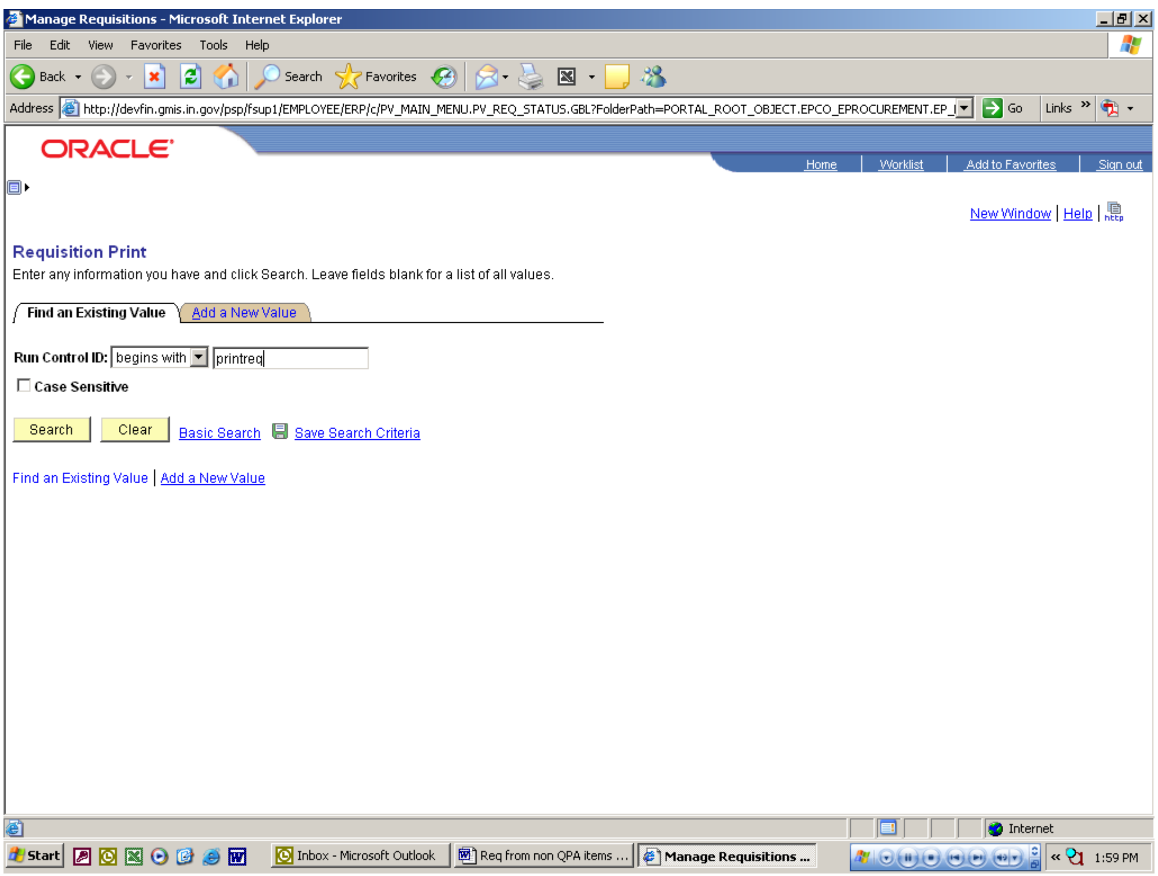
NOTE: A requisition must be in Approved Status and have a valid Budget Check before it can be used in either the RFQ or Purchase Order processes.

Printing a Requisition

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

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

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

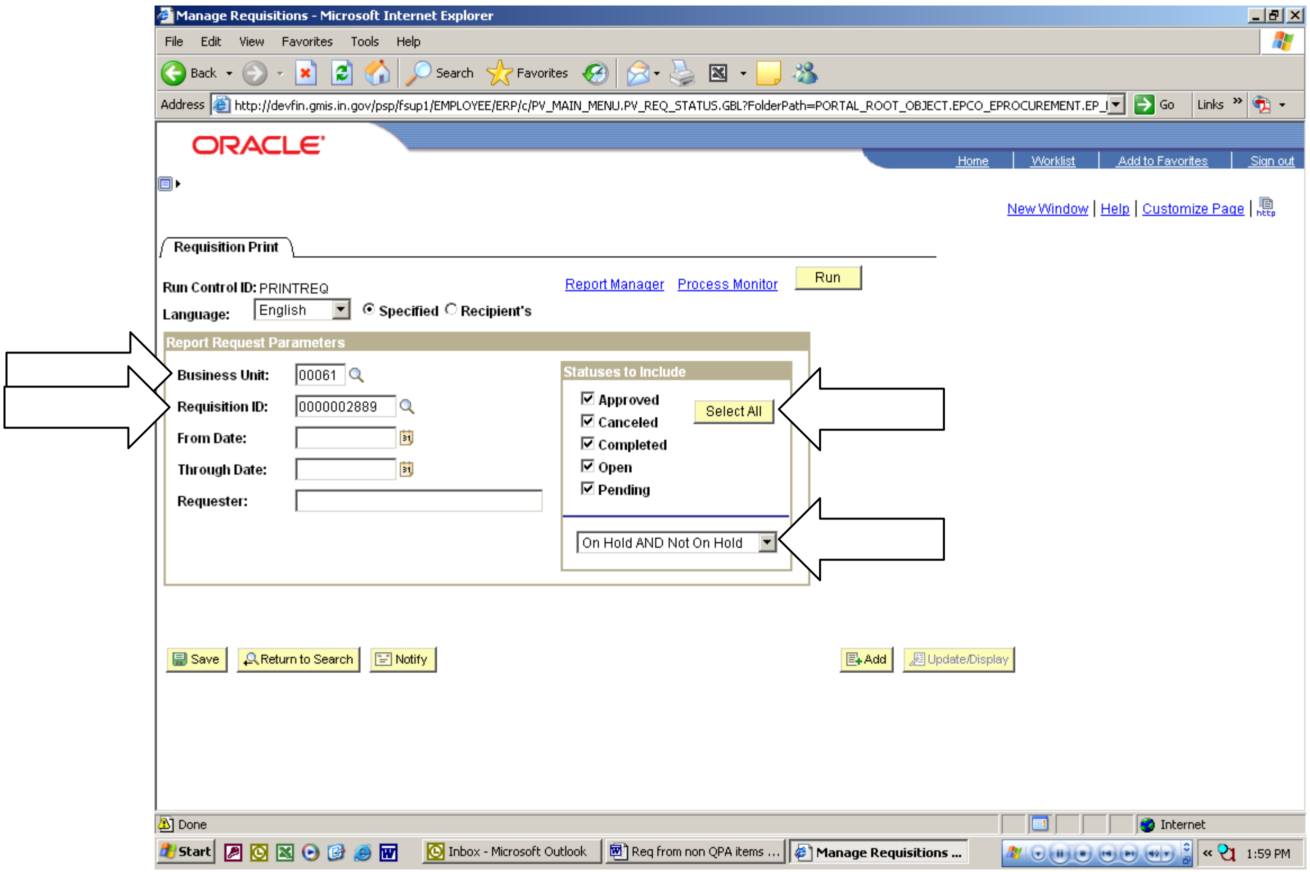


After creating or searching for an existing Run Control ID you will be taken to the following screen. At this screen you will enter your search criteria to find the requisition of which to create a PDF.

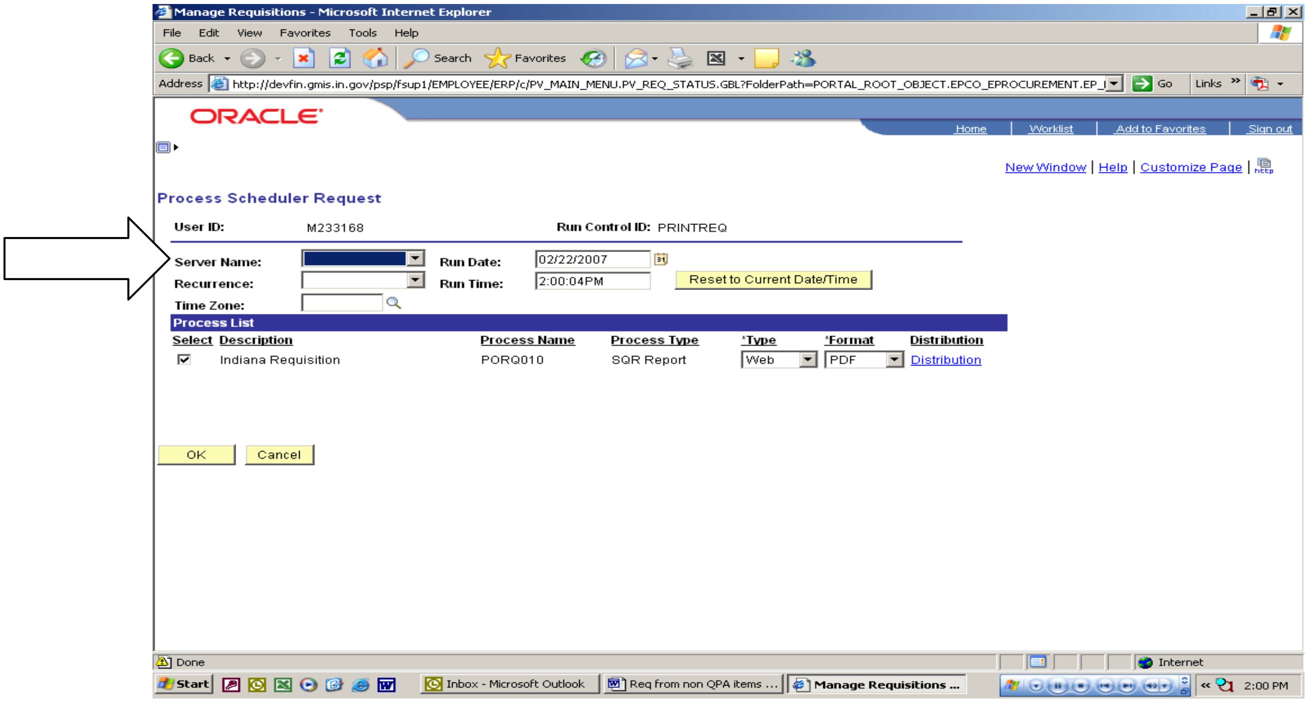
On this screen you will need to enter the five digit Business Unit number and the ten digit Requisition ID in the corresponding areas.

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.

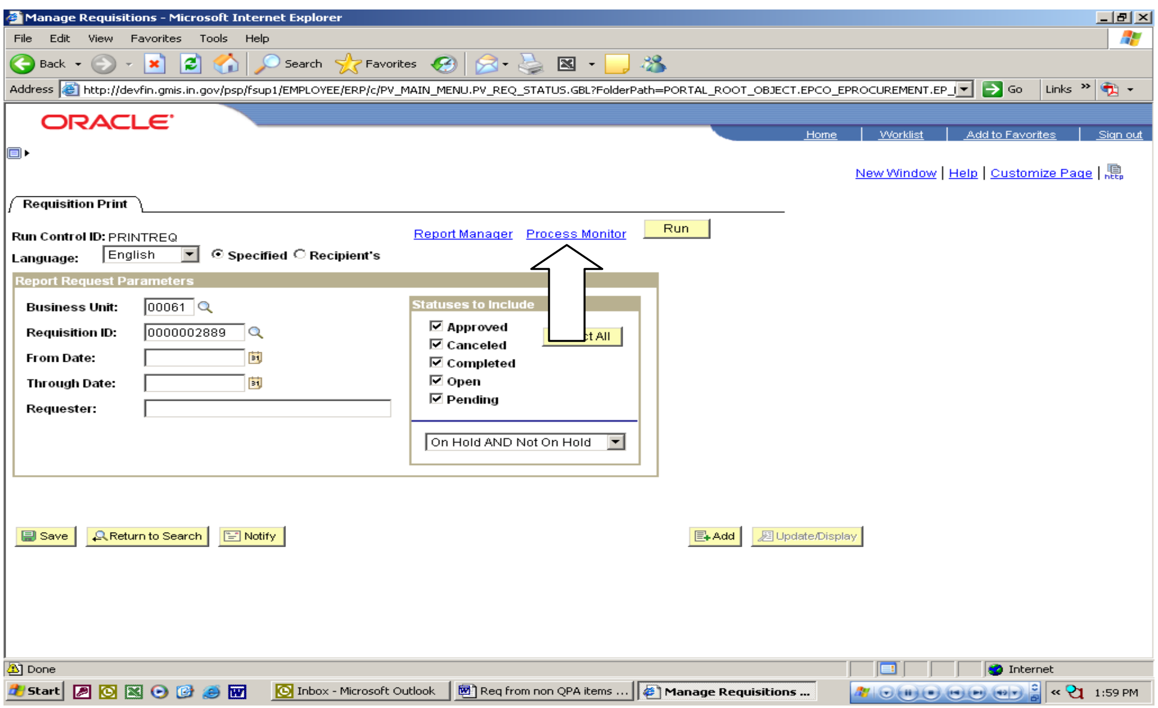
To continue the processing click the Run button. This will take you to a new screen.



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.

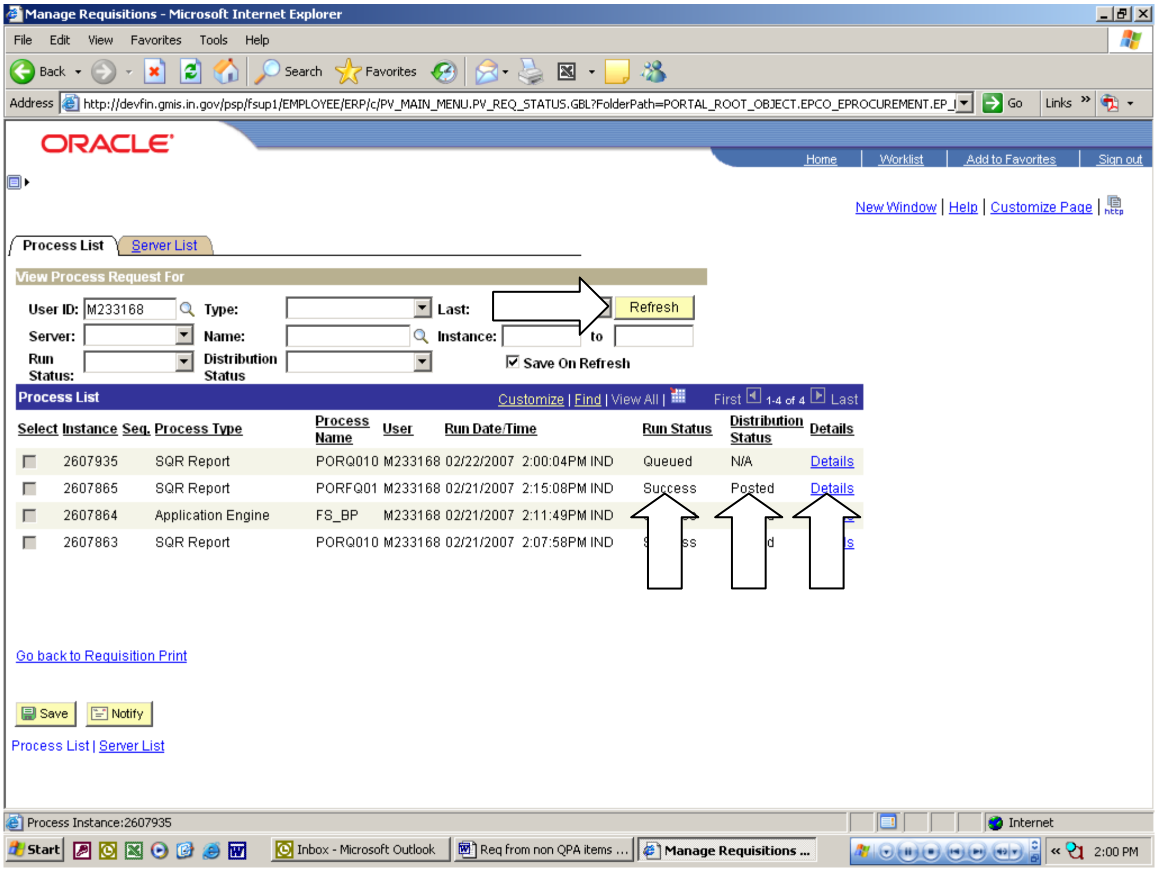


After clicking the OK button you will be taken back to the Requisition Print screen. Once here click the Process Monitor link.

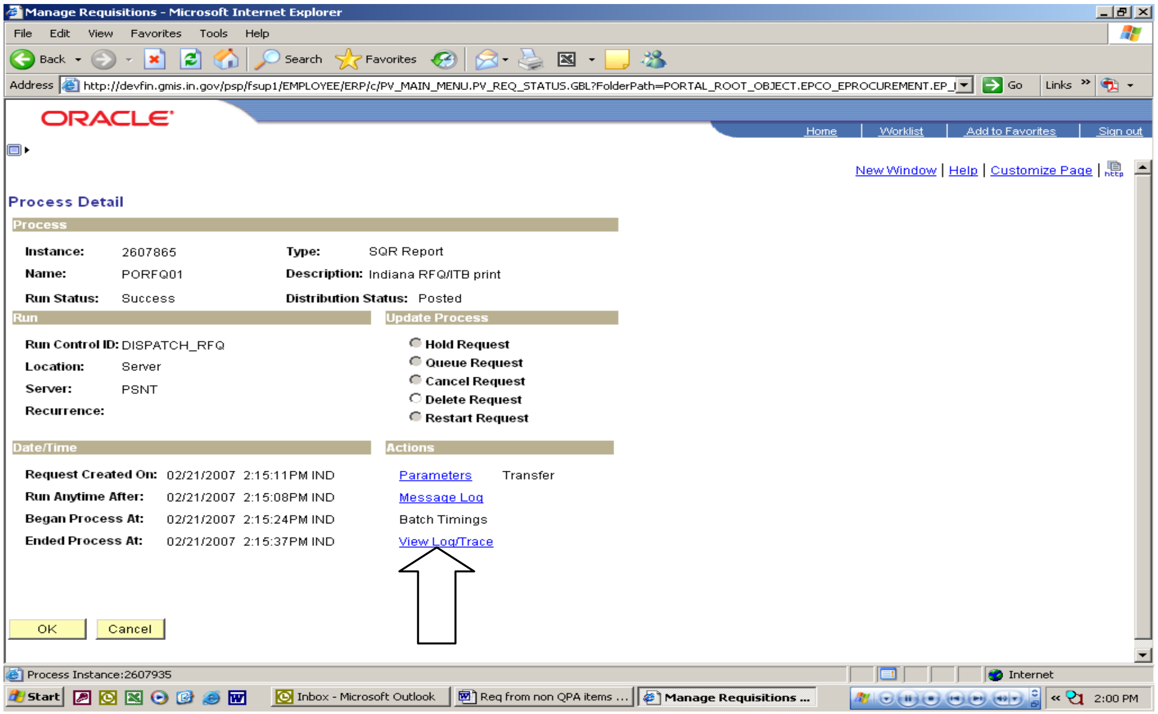


After clicking the Process Monitor link the following screen will allow the PDF creation process to be monitored and to be able to access and print a copy of the requisition PDF. At this screen your process will be the top line listed. You want the Run Status column to be Success and the Distribution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

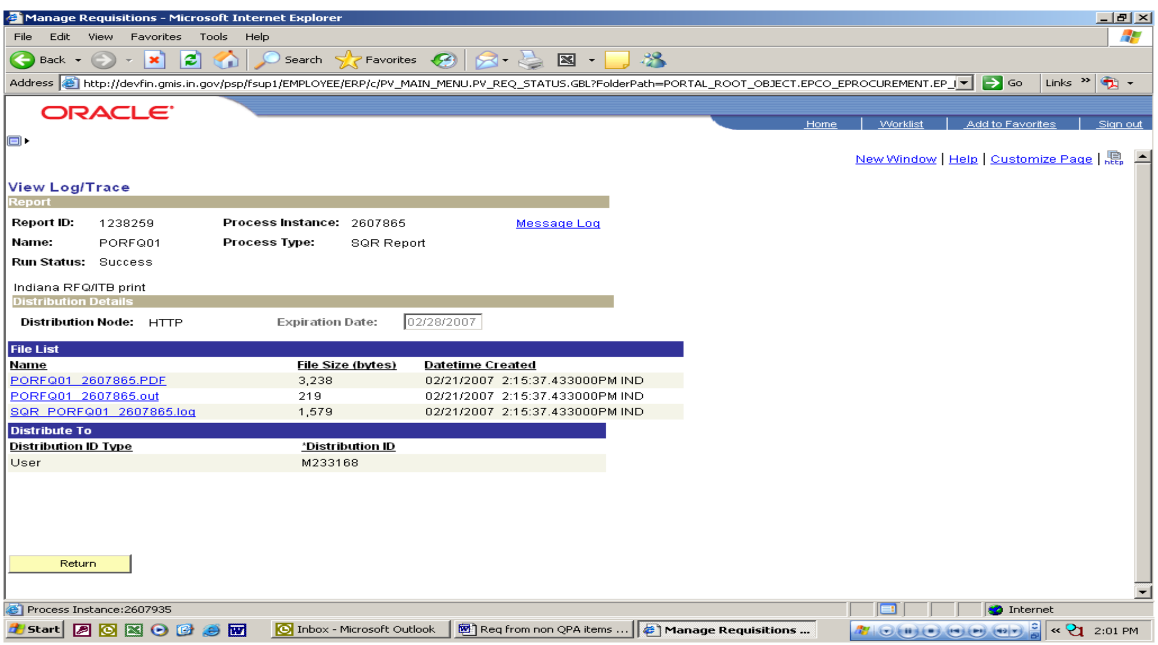
Once all statuses are what they need to be then click the Details link to be taken to the next screen.



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.