



Indiana Department of Administration
Procurement Division

PeopleSoft eProcurement

Issuing a Purchase Order using Expedite Requisitions

Version 18.6-07

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Financials Procedure Overview

Purchase that does not require solicitation and no contract is required



Issuing a Purchase Order using Expedite Requisitions

Retrieve the Requisition Schedule Lines

Menu Navigation

eProcurement >> Buyer Center >> Expedite Requisitions

On the Expedite Requisitions page the user must enter search criteria to find the Approved and Valid Requisition lines to expedite to a Purchase Order (PO). The recommended criteria are below:

Expedite Requisitions
Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit: 00061
Requisition ID: 0000019270
Requisition Name:
Requester:
Buyer:
Category:
Vendor Name:
 Include Lines With No Vendor

Search Clear

i Enter search criteria to find Requisitions.
[Go to Process Monitor](#)

1. Business Unit

The user must enter/verify the five digit version of the Business Unit of the Requisition. The Buyer will have a default value populated here; it can be edited if the user has been given access to multiple business units and needs to access a different one.

2. Requisition ID

The user can enter the ten digit Requisition number.

After the search criteria have been entered the user must click Search to retrieve the Requisition Schedule Lines that match.

Review the Requisition Schedule Lines

Verify the QPA vendor information

If the user is creating a PO from a Requisition that was built from QPA items, the appropriate Vendor Name and Location associated with the items will be populated as shown below. If the remaining information (including the Requisition ID, Line, Schedule, Item Description, PO Quantity, Unit of Measure, Pricing, Currency and Amount Only) is correct, the user can skip to the Select the lines and Submit section to proceed.

The screenshot shows the 'Requisition Schedule Lines' interface. At the top, there are 'Search' and 'Clear' buttons. Below is a table with columns: Include, Requisition ID, Line, Sched, Item Description, Select, Vendor Name, Location, PO Qty, UOM, Price, Curr., and Amount Only. Three lines are listed, all with Vendor Name 'COLLINGRO-001' and Location '000001'. Below the table are checkboxes for 'Include All/Exclude All' and 'Select All/Deselect All', a search field, and an 'Apply Vendor to Selected Lines' button.

Include	Requisition ID	Line	Sched	Item Description	Select	Vendor Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
<input type="checkbox"/>	0000017936	1	1	Flag, Indiana	<input type="checkbox"/>	COLLINGRO-001	000001	2.0000	EA	18.91000	USD	N
<input type="checkbox"/>	0000017936	2	1	Flag, US, 3' x	<input type="checkbox"/>	COLLINGRO-001	000001	2.0000	EA	17.02000	USD	N
<input type="checkbox"/>	0000017936	3	1	Flag, POW/MIA	<input type="checkbox"/>	COLLINGRO-001	000001	2.0000	EA	28.20000	USD	N

Apply the vendor information

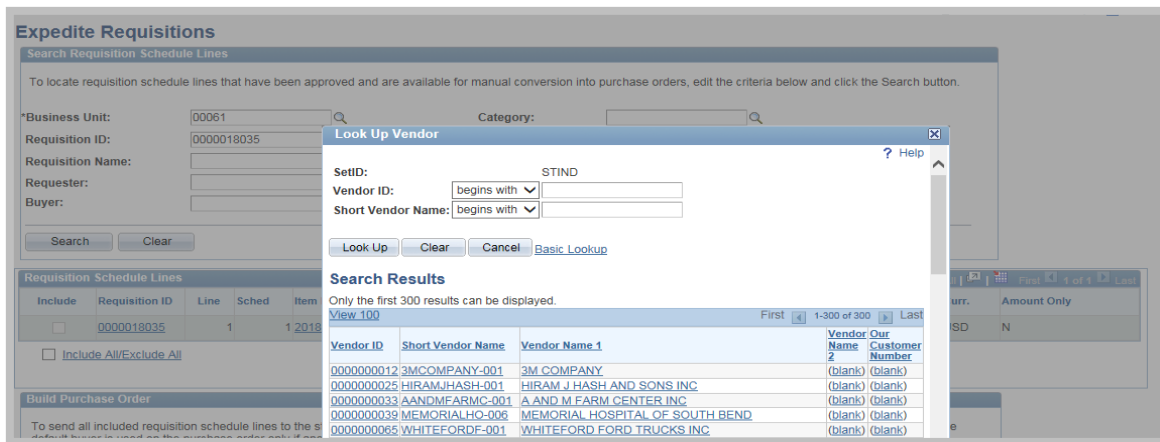
If the user is creating a PO from a Requisition that was not built from QPA items, the user will have to select the appropriate Vendor Name and Location because they will not be populated as shown below.

The screenshot shows the 'Requisition Schedule Lines' interface. The table has one line with Requisition ID '0000018035', Line '1', and Item Description '2018 Snow Remov'. The Vendor Name and Location fields are empty and have magnifying glass icons. Below the table are checkboxes for 'Include All/Exclude All' and 'Select All/Deselect All', a search field, and an 'Apply Vendor to Selected Lines' button.

Include	Requisition ID	Line	Sched	Item Description	Select	Vendor Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
<input type="checkbox"/>	0000018035	1	1	2018 Snow Remov	<input type="checkbox"/>			1.0000	ANN	15000.00000	USD	N

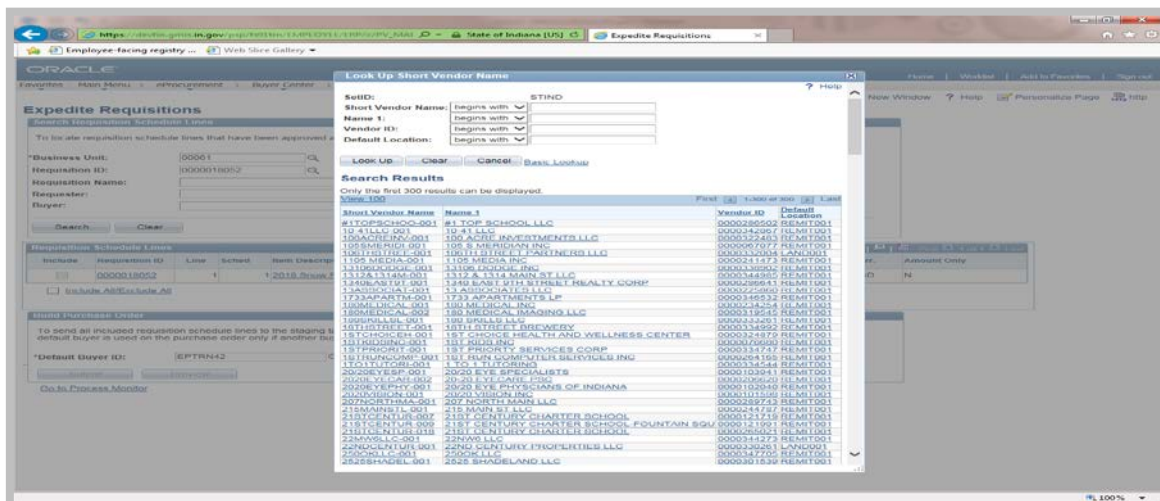
If the Short Vendor Name is known, enter it into the Vendor Name field and click tab for the location to be populated. If the Short Vendor Name is not known, the user will need to click the magnifying glass to the right of the Vendor Name field.

The user can search by the vendor ID or a portion of it (ten digit number assigned by the Auditor of State's office) or the Short Vendor Name (compressed version of the vendor's legal name). IDOA suggests the user search by changing the Short Vendor Name dropdown to "contains" and entering a unique portion of the company name in the field before clicking Look Up. Once the user has located the correct vendor he/she should click anywhere on the appropriate vendor's row to return to the prior screen. The vendor name and location will be populated in the fields.



If there are multiple lines, then the vendor name can be copied in pasted into the remaining lines or use the following method instead.

If the Short Vendor Name is not known, the user will need to click the magnifying glass to the left of the Apply Vendor to Selected Lines button. The user can search by any of the available criteria. IDOA suggests the user search by changing the Name 1 (the Vendor’s legal name) dropdown to “contains” and entering a unique portion of the company name in the field before clicking Look Up. Once the user has located the correct vendor he/she should click anywhere on the appropriate vendor’s row to return to the prior screen. The vendor name and location will be populated in the field.



The user can click the checkbox in the Select column for each row or can click on the Select All/Deselect All link to select all of them. The user must click Apply Vendor to Selected Lines so the vendor name and location will be populated on them.

Any items not tied to a QPA contract should have a Location with the word REMIT included. Before making adjustments to the location see the section labeled Changing the Vendor’s Addresses in the PO Processing manual. QPA line items have been set up to default the location tied to the contract – no adjustment to the location should be made.

If the remaining information (including the Requisition ID, Line, Schedule, Item Description, PO Quantity, Unit of Measure, Pricing, Currency and Amount Only) are correct, then the user can skip to the Select the lines and Submit section to proceed.

Select the lines and Submit

To build to the PO the user will need to select the checkbox under the Include column for each line or if all lines are needed, then he/she can click the Include All/Exclude All link beneath the list. Once the lines have selected the Submit and Preview buttons will become available.

Include	Requisition ID	Line	Sched	Item Description	Select	Vendor Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
<input checked="" type="checkbox"/>	0000017936	1	1	Flag, Indiana	<input type="checkbox"/>	COLLINSGRO-001	000001	2.0000	EA	18.91000	USD	N
<input checked="" type="checkbox"/>	0000017936	2	1	Flag, US, 3' x	<input type="checkbox"/>	COLLINSGRO-001	000001	2.0000	EA	17.02000	USD	N
<input checked="" type="checkbox"/>	0000017936	3	1	Flag, POW/MIA	<input type="checkbox"/>	COLLINSGRO-001	000001	2.0000	EA	28.20000	USD	N

Include All/Exclude All Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID: Build POs as Approved

[Go to Process Monitor](#)

The user should review/edit the Default Buyer ID and verify the Build POs as Approved checkbox is selected before clicking Submit. Selecting Build POs as Approved places the PO in Pending Approval status instead of Open status, eliminating processing steps on the PO. After the user clicks Submit, the page will refresh and the Requisition Schedule Lines will no longer be displayed and the Submit and Preview buttons will no longer be available.

Verify the PO Initiation

Through the Process Monitor

The user can click the Go To Process Monitor link at the bottom of the Expedite Requisitions page; a new window will open with the Report Manager. If the new window is not displayed, check the Windows Task Bar for an open window titled Report Manager.

The user can click Refresh until the Run Status and Distribution Status columns display Success and Posted. This indicates the creation process was successful.

Favorites | Main Menu > eProcurement > Buyer Center > Expedite Requisitions > Process Monitor

Process List | Server List

View Process Request For
 User ID: Type: Last: 1 Days
 Server: Name: Instance: to
 Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Control ID	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	16388189		Application Engine	PV_PO_CREATE	EPTRN42	PV_EXP-2018-05-03.11.18.049.2	05/03/2018 11:18:05AM EDT	Queued	N/A	Details

[Go back to Expedite Requisitions](#)

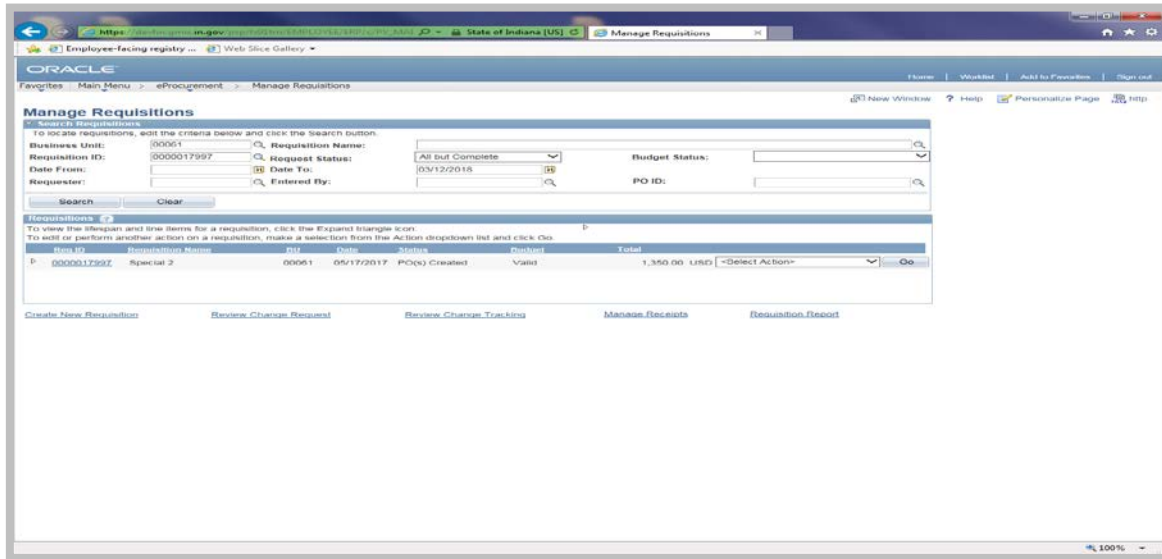
Process List | [Server List](#)

Through Manage Requisitions

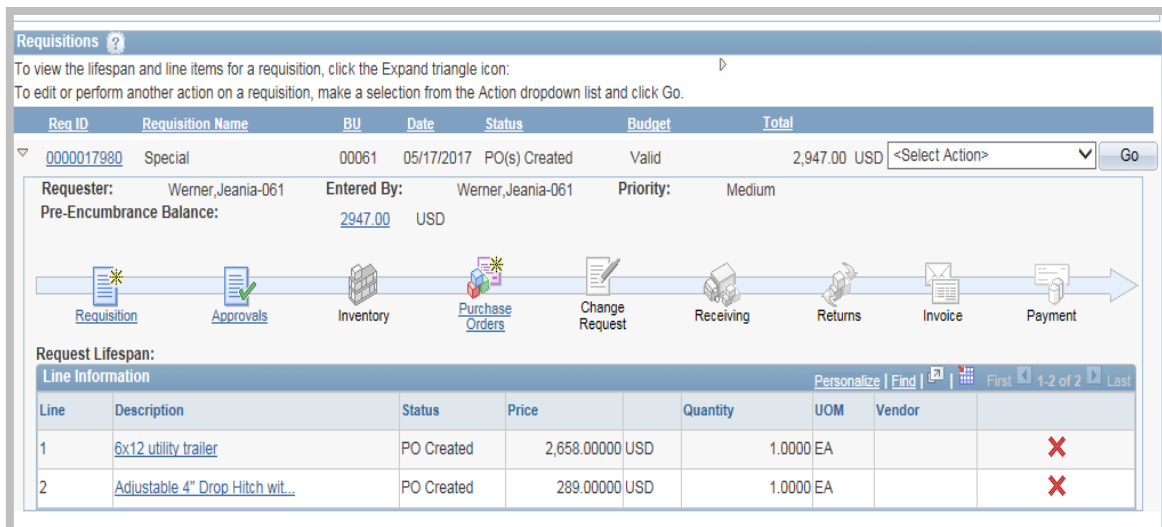
Menu Navigation

eProcurement >> Manage Requisitions

The user can locate the desired Requisition by entering any of the search criteria on the page and clicking Search. There must be a Business Unit and a Date To date (ending date of the search period) to run the process.



If the creation process was successful, the Status column will say PO(s) Created. If the user clicks the expand icon to the far left of the Req ID number, it will provide a basic overview of the Requisition header and includes the Request Lifespan (the completed actions will be highlighted) and Line Information.



If the user has access, then he/she can click on the highlighted Purchase Orders icon to retrieve the PO number. The user can click the icon again to collapse the information.

Purchase Order Inquiry

Business Unit: 00061

Requisition information		Find View All First 1 of 2 Last	
Requisition ID:	0000017980	Line Number:	1

PO information		Find View All First 1 of 1 Last	
PO Number:	0018500005	Buyer:	EPTRN42
PO Date:	05/03/2018	Vendor ID:	0000000025
		Terms:	AREAR
		Change Order:	
		PO Status:	Pend Appr

Lines								Personalize Find View All First 1 of 1 Last	
Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details		
1		6x12 utility trailer	2,658.000 USD	EA	1.0000	Approved			

[Return to Manage Requisitions](#)

The user can click on the Requisition ID number assigned by PeopleSoft to display the Requisition Details page. The user can retrieve the Purchase Order number(s) by clicking the expand icon on the line(s) labeled PO Information. After the user has reviewed the information, he/she can click the Return to Manage Requisitions link to return to that page.

Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
Special	0000017980	00061	05/17/2017	PO(s) Created	2,947.00

Pre-Encumbrance Balance: 2947.00USD Req Type: Small Purchase

Header Comments:
Comment 1: Utility trailer and hitch for fleet services

Line	Item Description	Source	Status	Amount Only	Qty	Price	Status	Total
1	6x12 utility trailer		Complete	N	1.0000 Each	2,658.00000 USD	Approved	2,658.0000

PO Information Find | View All | First | 1 of 1 | Last

PO No.	PO Status	Vendor	Receipt Status
0018500005	Pending Approval/Approved/NC	HIRAM J HASH AND SONS	PO Not Received

PO Line Information							Personalize Find First 1 of 1 Last	
PO Line	Sched #	Due Date	Ship To	PO Qty	Price			
1	1	06/02/2018	061MIS	1.0000	2658.00000 USD			

PO Information Find | View All | First | 1 of 1 | Last

PO No.	PO Status	Vendor	Receipt Status
0018500005	Pending Approval/Approved/NC	HIRAM J HASH AND SONS	PO Not Received

PO Line Information							Personalize Find First 1 of 1 Last	
PO Line	Sched #	Due Date	Ship To	PO Qty	Price			
2	1	06/02/2018	061MIS	1.0000	299.00000 USD			

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

Or he/she can navigate directly to eProcurement>>Buyer Center>>Manage Purchase Orders to verify and complete the PO. The Verify and Complete the Purchase Order manual and other helpful resources are posted at <http://www.in.gov/idoa/2934.htm>.