



PeopleSoft Training

Managing Requisitions 9.1 BRFHS and BRFHM

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Managing Requisitions 9.1 BRFHS and BRFHM

Welcome to the **PeopleSoft 9.1 Managing Requisitions** module! This module contains the tools needed to learn many of the concepts and procedures involved in Requisitioning items.

Goal

To have the skills and knowledge necessary to create a Requisition and perform the objectives listed below.

Participant Objectives

At the end of this module you will be able to.....

1. Enter a Requisition.
2. Add comments to a Requisition.
3. View an existing Requisition.
4. Print a Requisition.
5. Copy a Requisition from an existing Requisition.
6. Inquire on a Requisition.

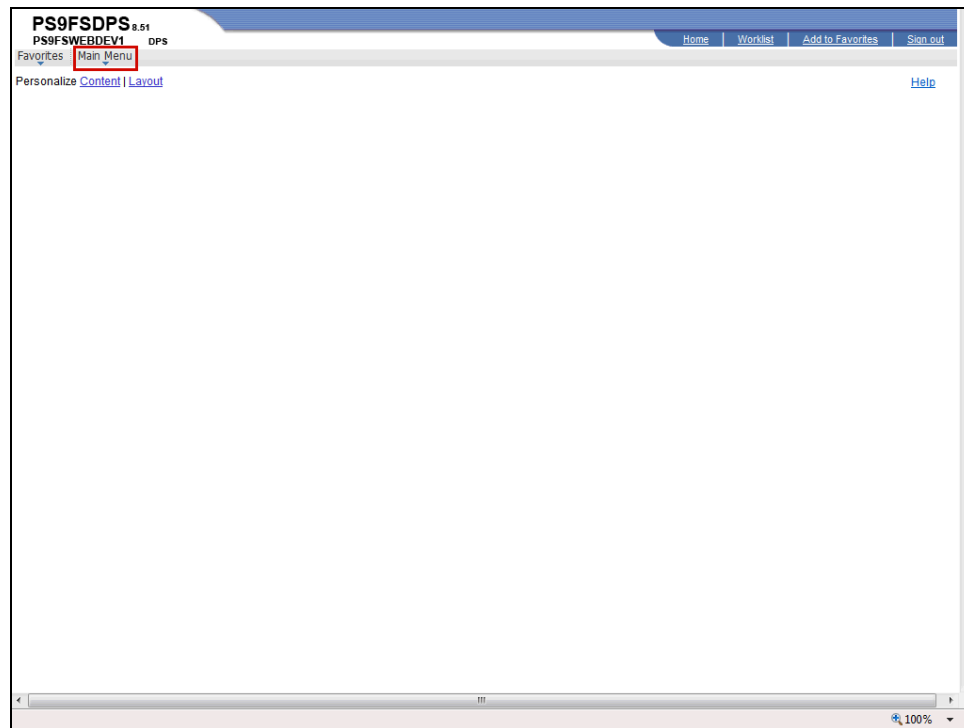
NOTE: The functions in this manual must be performed in the PeopleSoft Production Database. Any data entered into a non-production database will be lost.


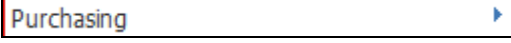

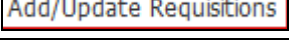
Requisition Basics

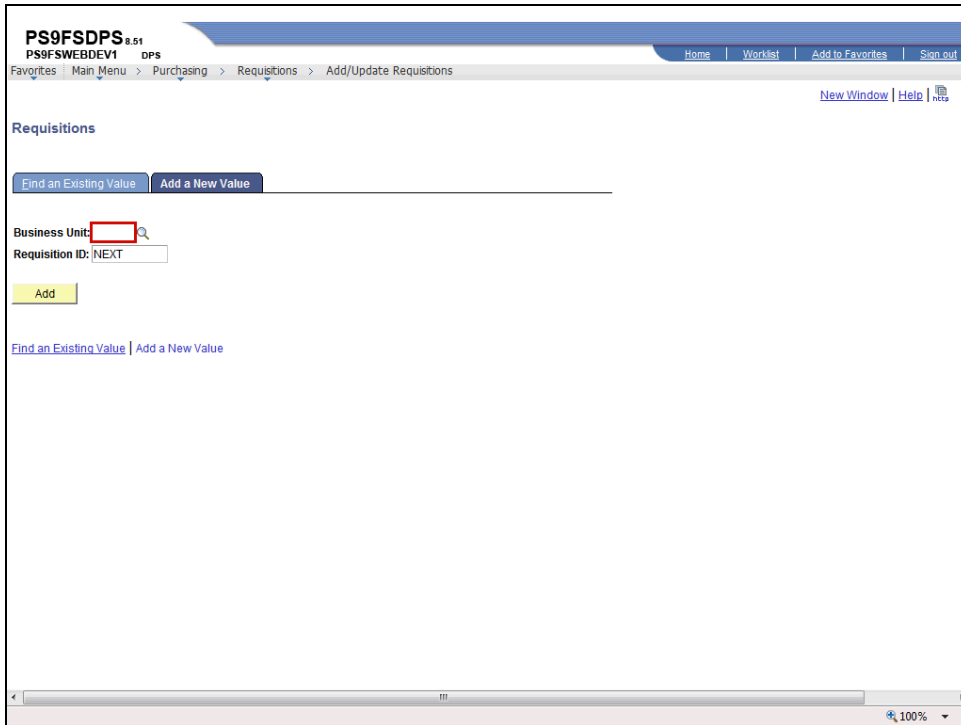
Use the Look up Feature

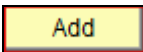
Procedure

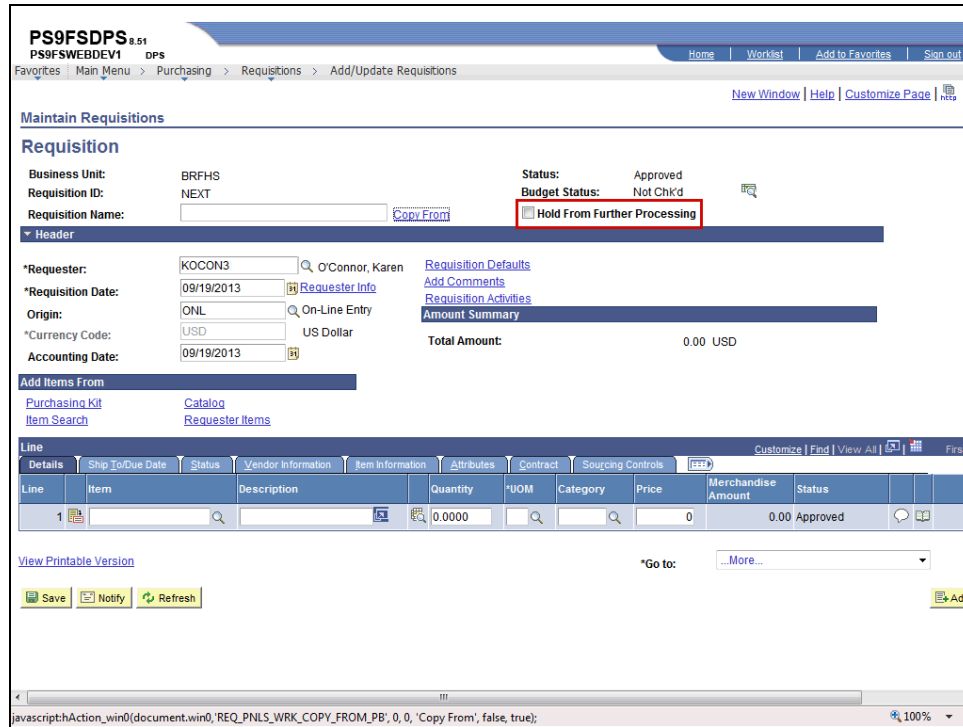
In this topic you will learn how to **Use the Look up Feature**.



Step	Action
1.	Click the Main Menu button. 
2.	Click the Purchasing menu. 
3.	Click the Requisitions menu. 
4.	Click the Add/Update Requisitions menu. 




Step	Action
5.	Enter the desired information into the Business Unit field. Enter " BRFHS ".
6.	Click the Add button. 



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PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions





New Window | Help | Customize Page | 

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved
 Requisition ID: NEXT Budget Status: Not Chk'd
 Requisition Name: [Copy From](#) **Hold From Further Processing**


▼ Header

*Requester: KOC0N3  O'Connor, Karen [Requisition Defaults](#)
 *Requisition Date: 09/19/2013  [Requester Info](#) [Add Comments](#)
 Origin: ONL  On-Line Entry [Requisition Activities](#)
 *Currency Code: USD US Dollar [Amount Summary](#)
 Accounting Date: 09/19/2013  Total Amount: 0.00 USD

Add Items From





[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line


Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls | 

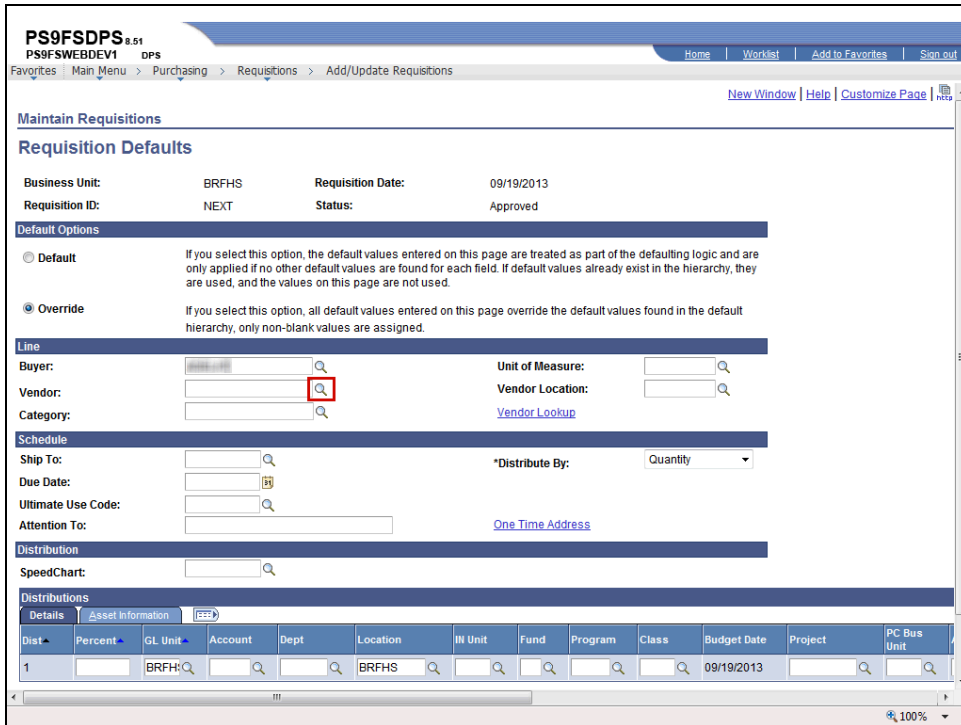
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Approved


[View Printable Version](#) *Go to:

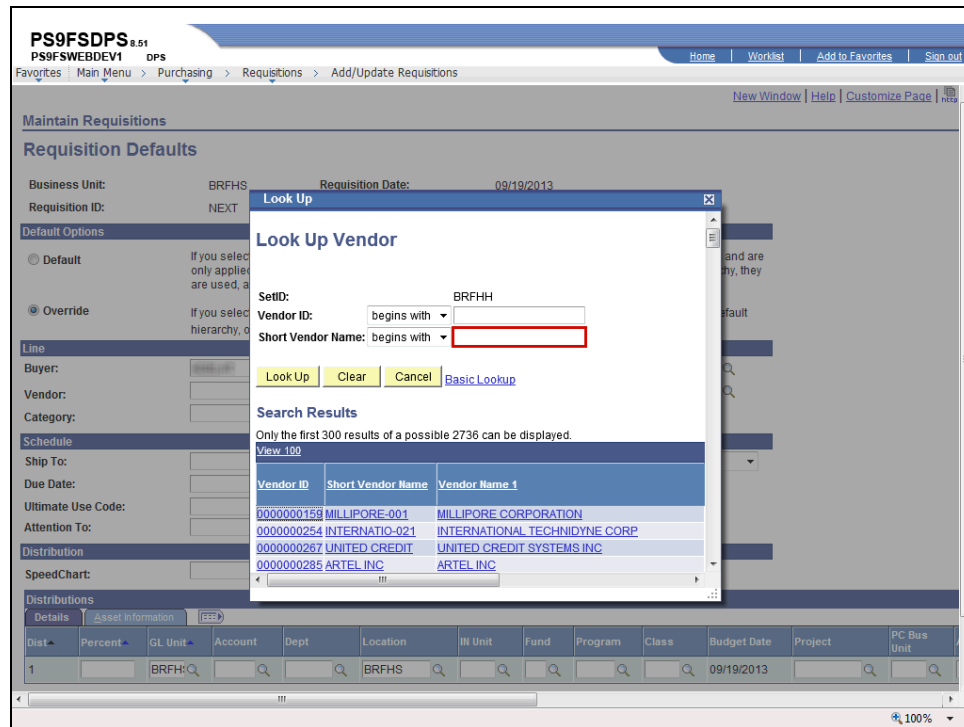
 Save  Notify  Refresh  Add


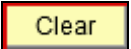
javascrpthAction_win0(document.win0, REQ_PNLS_WRK_COPY_FROM_PB, 0, 0, 'Copy From', false, true);

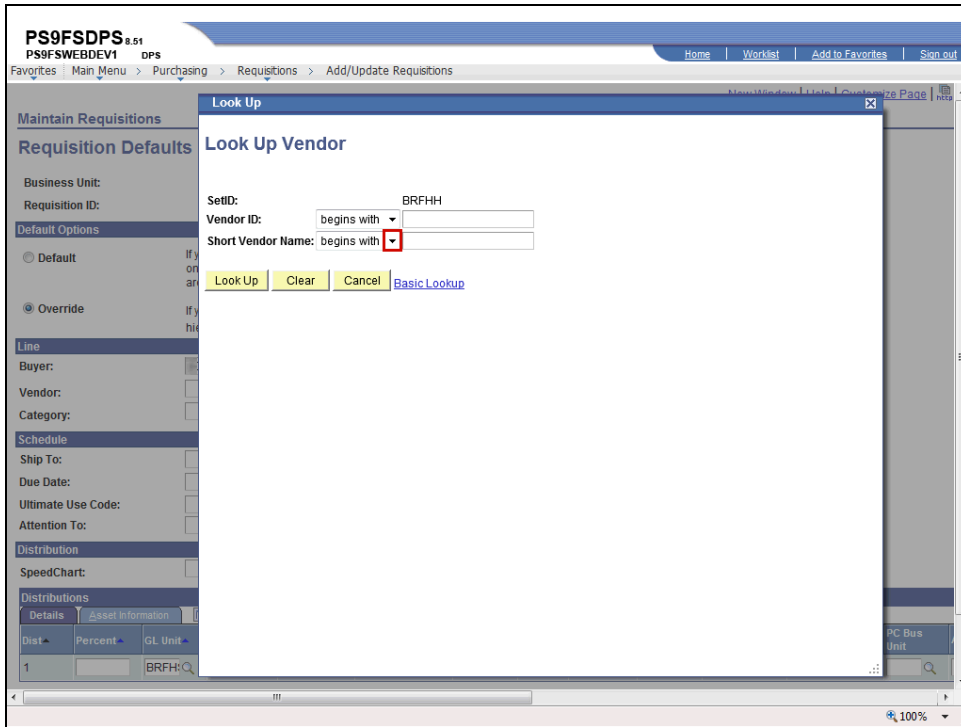
Step	Action
7.	Click the Hold From Further Processing option. 
8.	Click the Requisition Defaults link. Requisition Defaults
9.	The Look up feature is depicted in the database as a magnifying glass. Anytime you see a magnifying glass next to a field, you have look up capability. The Look Up feature allows you to search for all valid values in the database for a specific field. It can also be used to narrow the scope of your search when a large number of values are returned.
10.	In this example you will search for an appropriate value for the Vendor field. The 10-digit Vendor ID number is the value needed for the Vendor field rather than the vendor name. You will use Office Depot as your vendor. You will locate and select Office Depot utilizing the Look up feature. Once selected, the system will default the Vendor ID number into the Vendor field, thus completing the Look up process.


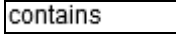






Step	Action
11.	Click the Look up Vendor button. 
12.	The system will automatically display some field values on the Look up page. Only 300 results can be displayed at a time. If there are more than 300 results returned, you must use the search fields provided to help narrow the scope of your search. A message will display above the returned results if more than 300 options are available. In this example there are a total of 2736 vendors from which to choose.
13.	The number of results retrieved can be reduced by entering all or part of either the Vendor ID or Short Vendor Name into the search fields provided. Most users will utilize the Short Vendor Name option as their search parameter. There are three operators that can be used to help narrow your search results. They are: <ul style="list-style-type: none"> • begins with, • contains, and • the wildcard (% sign).
14.	begins with The system defaults the "begins with" operand for all search fields. In this example you will search for Office Depot using the Short Vendor Name field and the "begins with" operand.



Step	Action
15.	Enter the desired information into the Short Vendor Name field. Enter " OFFICE ".
16.	Click the Look Up button. 
17.	The system has only returned vendor names that begin with the word Office thus reducing the list of options from 2736 to 6.
18.	Click the Clear button. 



Step	Action
19.	<p>contains</p> <p>The second search option is "contains". The "contains" operand can be selected by clicking the drop-down arrow to the right of the Short Vendor Name field.</p> <p>Click the button to the right of the Short Vendor Name field.</p> 
20.	<p>Click the contains list item.</p> 
21.	<p>Enter the desired information into the Short Vendor Name field. Enter "OFFICE".</p>
22.	<p>Click the Look Up button.</p> 
23.	<p>The system has returned vendor names that contain the word Office. Using the "contains" operand reduced the original search results from 2736 to 8.</p> <p>Use the vertical scroll to view additional results.</p>
24.	<p>Click the Clear button.</p> 
25.	<p>The Wildcard</p> <p>The third search option is the "wildcard". The "%" sign is used as a "wildcard" in the system, taking the place of letters, words, numbers, etc.</p>

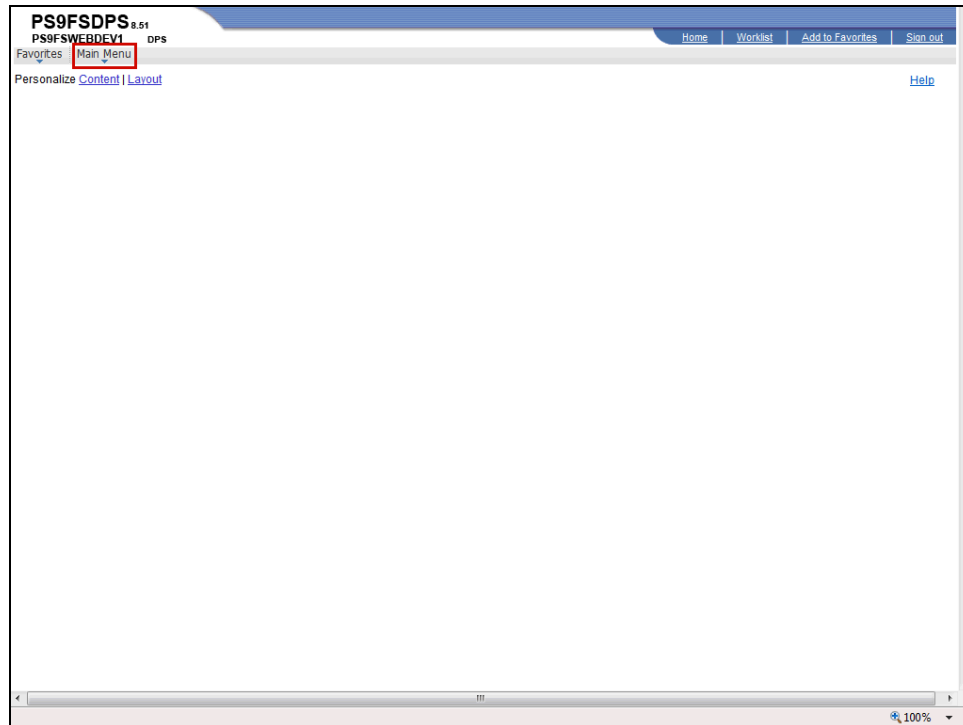
Step	Action
26.	<p>Where the % sign is placed will determine the type and number of results retrieved. For example:</p> <ul style="list-style-type: none"> • office% – all vendor names beginning with the word office will be returned. This option will return the same number of results as using the "begins with" operand. • %office% - all vendor names containing the word office will be returned. This option will return the same number of results as using the "contains" operand.
27.	<p>Enter the desired information into the Short Vendor Name field. Enter "OFFICE%".</p>
28.	<p>Click the Look Up button.</p> 
29.	<p>The system has returned vendor names that begin with the word Office. Using the "wildcard" option has reduced the original search results from 2736 to 6.</p>
30.	<p>Each line contains a series for links for the specified vendor. Links are generally underlined and blue in color. You can click any link on the desired vendor's line and the system will default the needed information onto the Requisitions Defaults page.</p>
31.	<p>In this example, you will click the Vendor ID link to select the Office Depot option.</p> <p>Click the 0000002440 link.</p> 
32.	<p>The system defaults the desired Vendor ID into the Vendor field.</p>
33.	<p>This completes <i>Using the Look up Feature</i>. End of Procedure.</p>





Create/Find a Run Control ID

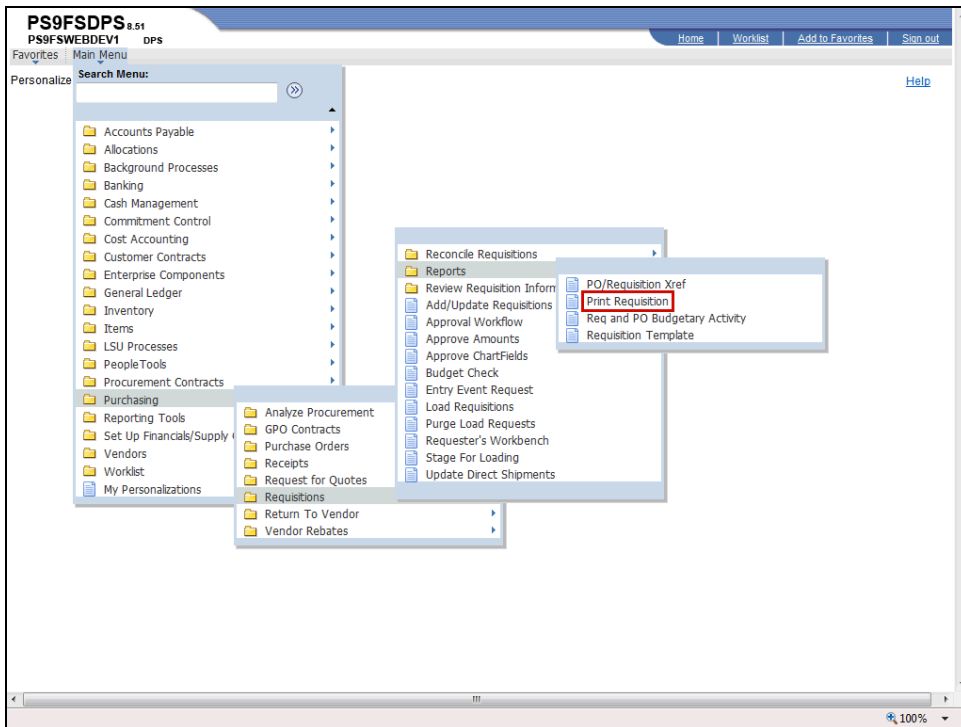
Procedure

In this topic you will learn how to **Create/Find a Run Control ID**.

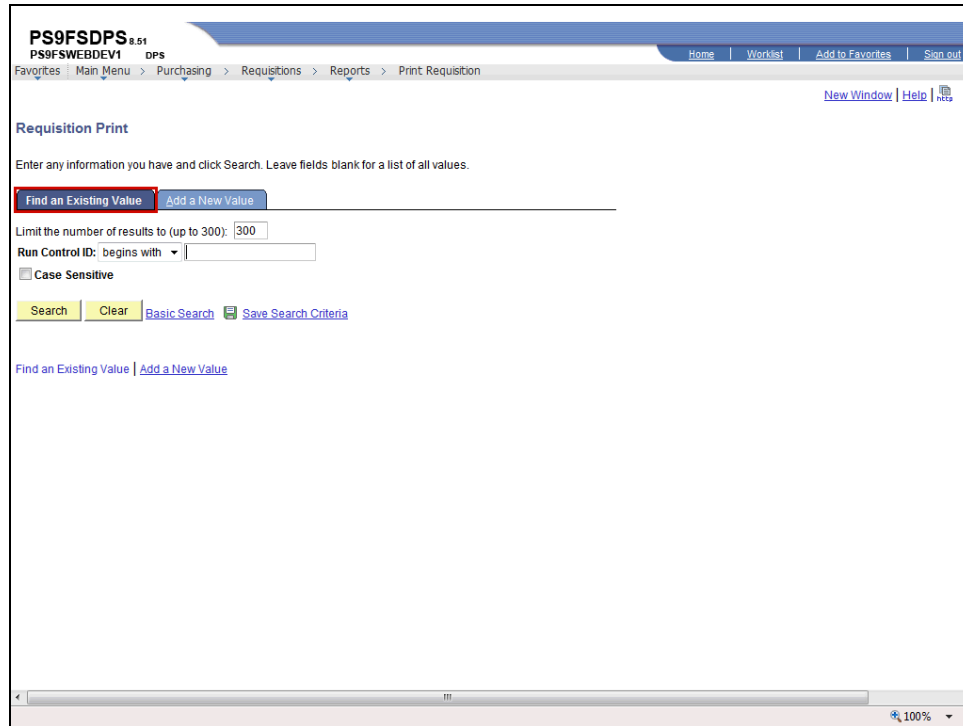
NOTE: All reports and processes are run using a “Run Control ID”. You will need to create an ID the **FIRST** time you run a report or process. All subsequent times you will use “Search” to find your ID. You can create more than one ID.

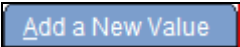


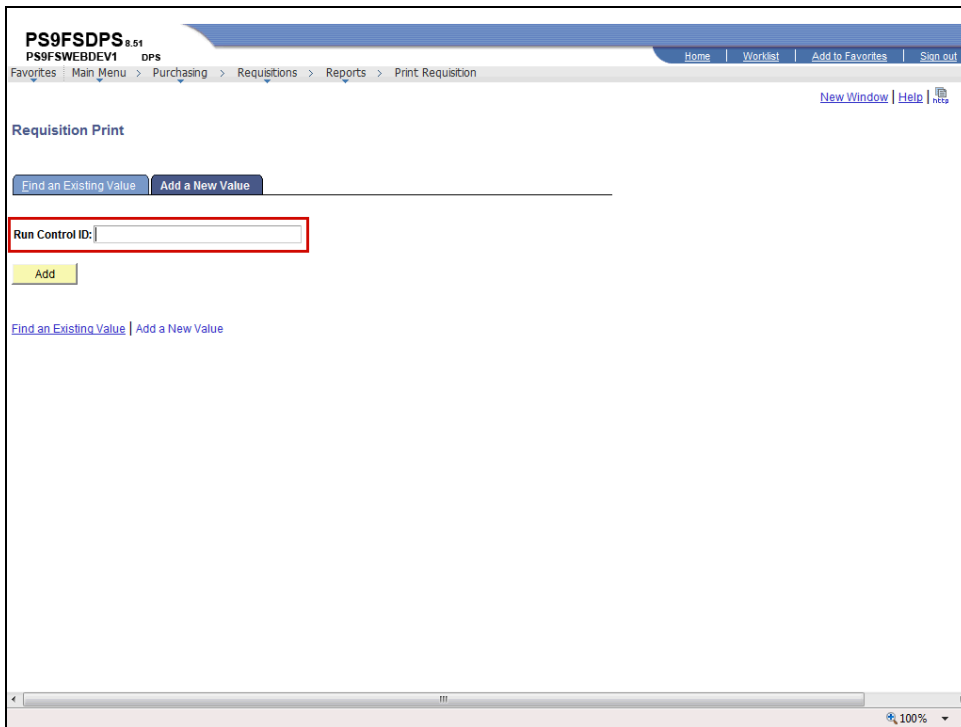
Step	Action
1.	Print Requisition will be used to demonstrate how to create/find a run control ID. Click the Main Menu button. 
2.	Click the Purchasing menu entry. 
3.	Click the Requisitions menu entry. 
4.	Click the Reports menu entry. 



Step	Action
5.	Click the Print Requisition menu. Print Requisition

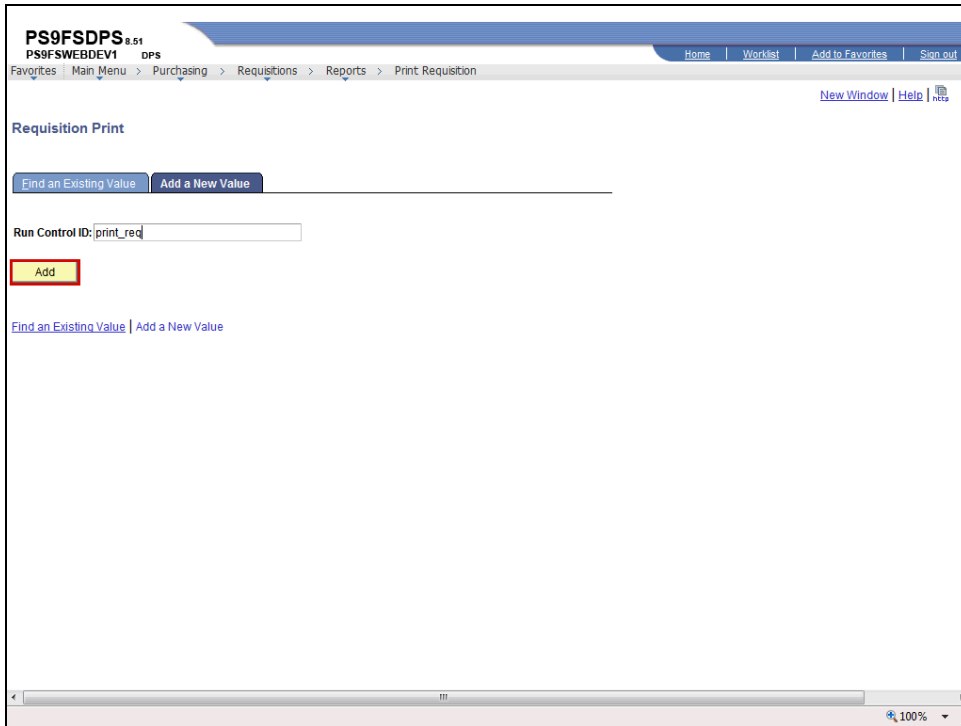



Step	Action
6.	<p>The first time you use Requisition Print, you will need to create a Run Control ID in order to access the Process Scheduler.</p> <p>The system defaults you into the Find an Existing Value tab. Click on the Add a New Value tab or hyperlink to create a run control id.</p> <p><i>NOTE: On all subsequent prints, you will use the Find an Existing Value tab to search for existing run control ids.</i></p>
7.	<p>Click the Add a New Value tab.</p> 

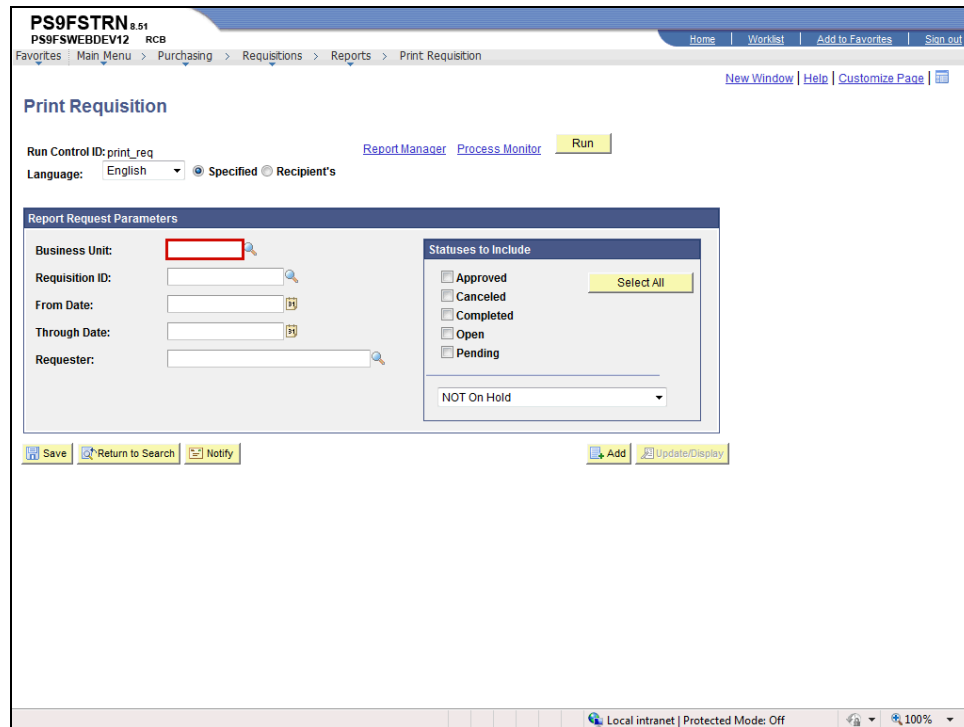


Step	Action
8.	<p>Run Control ID</p> <p>A Run Control ID is used as a means to access the Process Scheduler. You may save parameters related to a particular process or report to a Run Control ID to minimize data entry when running recurring processes and/or reports.</p> <p>A Run Control ID is:</p> <ol style="list-style-type: none"> 1. Specific to the end-user's Operator (User) ID; 2. Can be entered in upper case, lower case, or mixed case; 3. Can be up to 30 characters long; 4. Characters can be either number or letters, but cannot include any special characters (e.g. \$, &, #); 5. Cannot contain blank spaces; and 6. Must be one continuous string of characters or words must be linked by an underscore.
9.	<p>Examples of Run Control IDs that meet the requirements:</p> <ol style="list-style-type: none"> 1. print_req can be used since an underscore links the two words together; or 2. printrequisition can be used because it is one string of characters.

Step	Action
10.	<p>Examples of Run Control IDs that <u>do not meet</u> the requirements:</p> <ol style="list-style-type: none"> 1. print req because there is a blank space between the two words; or 2. print_requisition's because a special character is used. In this example an apostrophe is used.
11.	<p>A Run Control ID <u>must</u> be created to run many reports in PeopleSoft. If a run control is created that is unique to a specific report, it can be used to run the specified report in the future. The advantage to this method is that all Print Requisition page parameters are saved with the run control. When running future reports, a user would only have to change the Requisition ID instead of entering all report parameters again. If you create one run control to use for all reports, then you will need to change all report parameters each time a report is run.</p>
12.	<p>Enter the desired information into the Run Control ID field. Enter "print_req".</p>



Step	Action
13.	Click the Add button. 
14.	The parameters you enter on the Print Requisition page will be saved to the specified run control id. When running the report in the future, the user will only change the Requisition ID; all other fields will remain as defaulted. You must save your parameters in order for your parameters to default in the future. <i>See the Uncheck Hold and Print Requisition topic for instructions on print your report.</i>



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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Reports > Print Requisition

New Window | Help | Customize Page | [?]

Print Requisition

Run Control ID: print_req [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English Specified Recipient's

Report Request Parameters

Business Unit:

Requisition ID:

From Date:

Through Date:

Requester:

Statuses to Include

Approved [Select All](#)

Canceled

Completed


Open


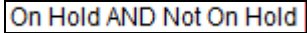
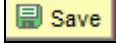
Pending

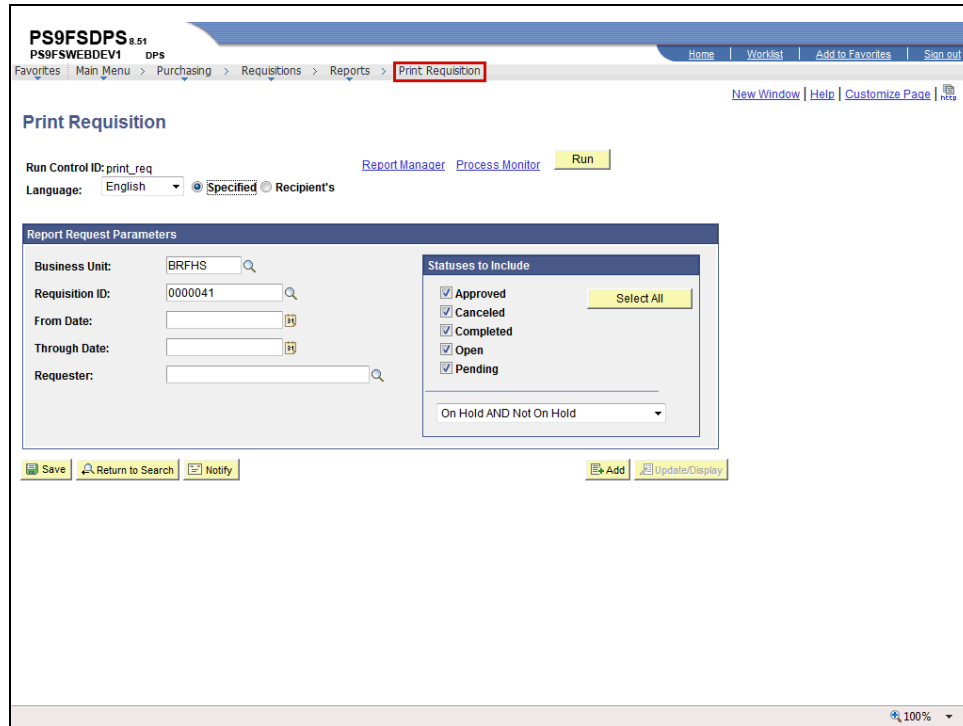
NOT On Hold

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

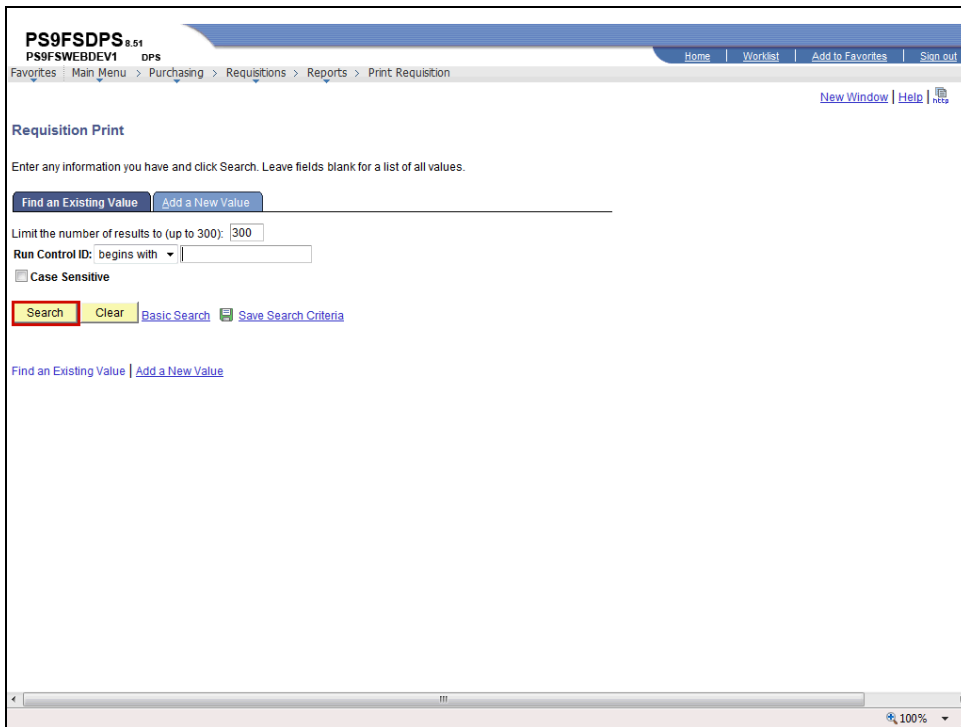
Local intranet | Protected Mode: Off | 100%

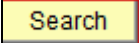
Step	Action
15.	If your Business Unit does not default into the Business Unit field, it must be entered or selected using Lookup Business Unit. Enter the desired information into the Business Unit field. Enter " BRFHS ".
16.	Enter the desired information into the Requisition ID field. Enter " 0000041 ".
17.	NOTE: Do not enter From Date, Through Date or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must be requested and printed ONE AT A TIME</u>, entering the requisition id will be sufficient to identify the requisition.
18.	Statuses to Include If you select the wrong status it will prevent the requisition from printing. If an individual option is selected, it will prevent you from being able to print the requisition. By clicking the Select All button, you will be able to print the requisition in any status. Click the Select All button. 

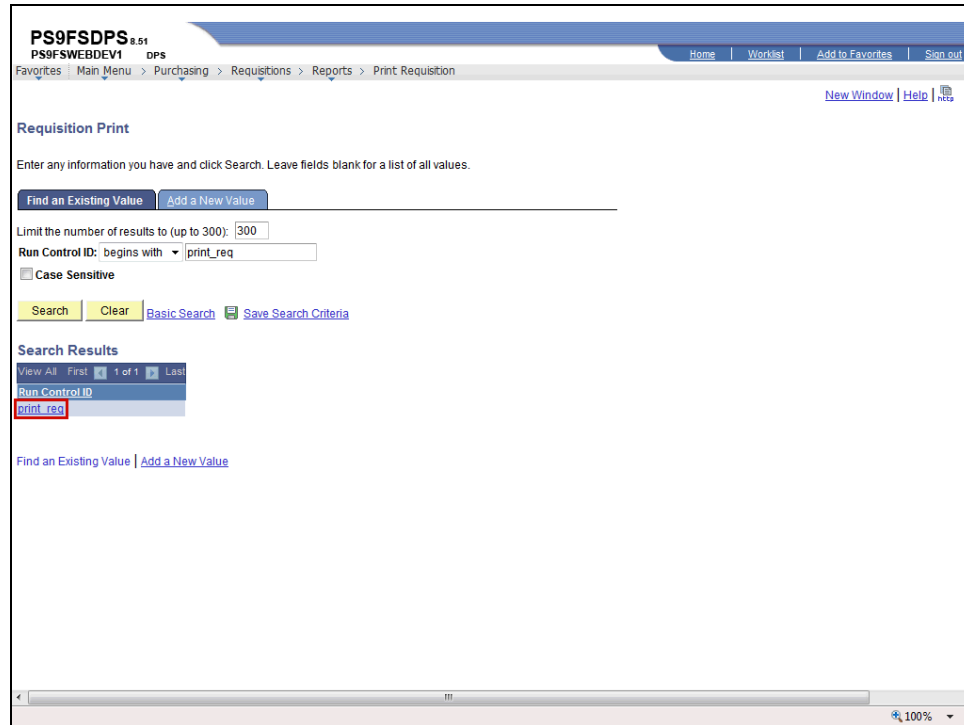
Step	Action
19.	<p>Statuses to Include (continued)</p> <p>As previously stated, if you select the wrong status it will prevent the requisition from printing. In this case using the default Not On Hold rather than On Hold AND Not On Hold. If the requisition is on hold, meaning the Hold From Further Processing checkbox is checked on the Maintain Requisition page, the requisition would not print using the defaulted NOT On Hold option. By selecting On Hold AND Not On Hold, you will be able to print the requisition regardless of whether the Hold From Further Processing box is checked or unchecked.</p>
20.	<p>Click the button to the right of the Pending field.</p> 
21.	<p>Click the On Hold AND Not On Hold list item.</p> 
22.	<p>Click the Save button.</p> <p><i>NOTE: You <u>must</u> save your parameters in order for your parameters to default in the future.</i></p> 



Step	Action
23.	<p>After saving your parameters, you would click the Run button to begin the print process. You must access the Report Manager to view and print your report.</p> <p><i>See the Uncheck Hold from Further Processing and Print a Requisition topic for instructions on how to print your requisition.</i></p> <p>For training purposes only, click the Print Requisition link.</p> <p>Print Requisition</p>



Step	Action
24.	<p>You can select the Find an Existing Value tab to search for an existing Run Control ID. Once selected, the Print Requisition page displays the information from the most recent print request.</p> <p>Click the Search button.</p> 



Step	Action
25.	<p>Select a run control id by clicking the desired run control id link from the Search Results list.</p> <p><i>NOTE: If you did not save your run control parameters, the run control id was not saved and the run control will not display in your search results.</i></p> <p>Click the print_req link.</p> <p>print_req</p>
26.	The Print Requisition page displays previously selected parameters.
27.	This completes <i>Create/Find a Run Control ID</i> . End of Procedure.

Requisitions

What is a Requisition?

A requisition is a request for items to be ordered from a vendor. Once the requisition is entered into the PeopleSoft system, the requisition must pass the Budget Check process. In order to source the requisitions to a Purchase Order (PO), the requisition must have a budget status of valid. The budget check process changes the budget status from No Checked to Valid.

Contacts for Assistance

The following will be your contacts for entering and managing requisitions:

- For **technical assistance** with PeopleSoft (e.g. problems accessing PeopleSoft, assistance with changing password, etc.), contact the Help Desk as follows:

Long Distance: 1-800-303-3290;

Local Calls: 1-504-568-HELP (4357); or

Email: helpdesk@lsuhsc.edu.

- For **functional assistance** with PeopleSoft (e.g. questions about entering requisitions, items being ordered, the bid process or other purchasing procedures), contact your Buyer.

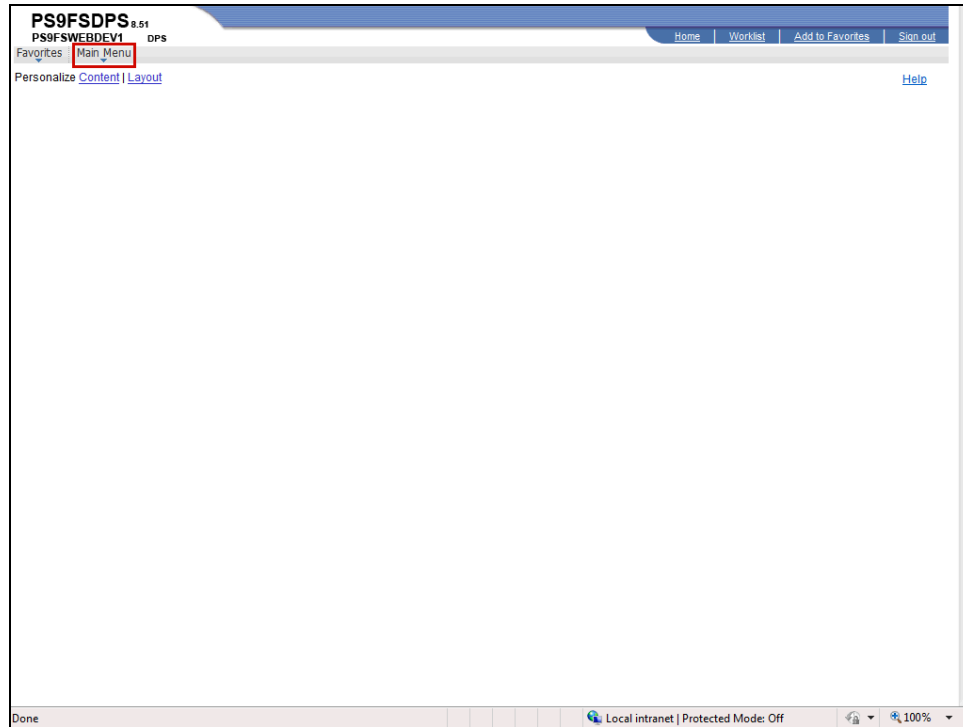
Enter a Requisition




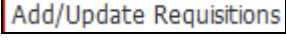
Procedure

In this topic you will learn how to **Enter a Requisition**.

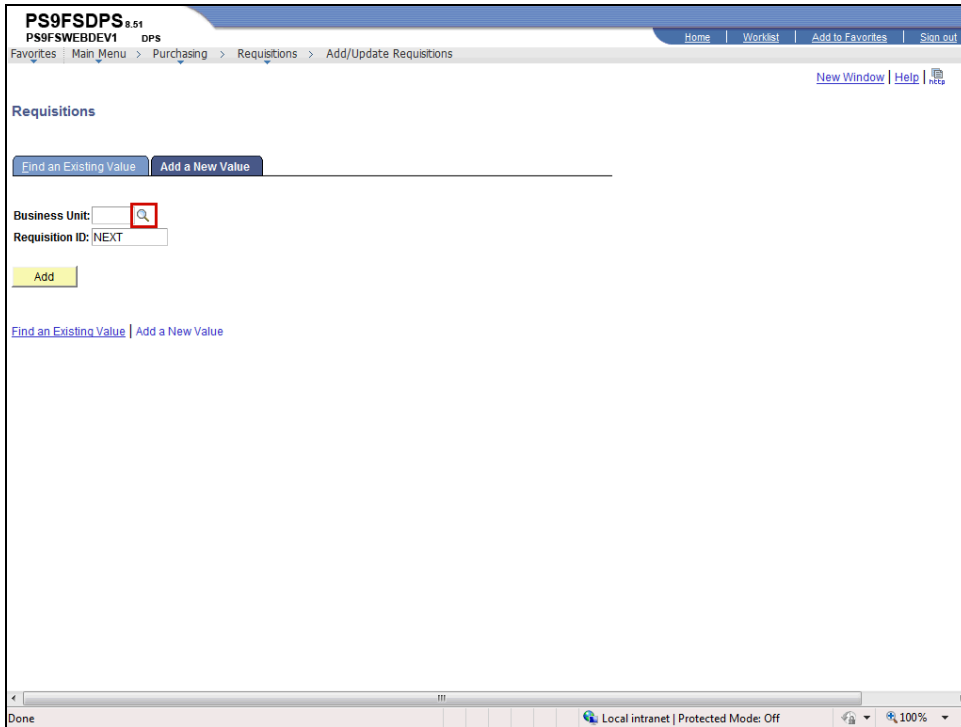
NOTE: The Buyer names, chartstrings and other values being shown in the exercises in this manual are only used for demonstration purposes. When working in Production, you must enter your own chartstrings and information.


Step	Action
1.	<p>Three (3) Steps to Entering a Requisition</p> <p>There are three steps to entering a requisition:</p> <p>Step 1: Enter Defaults (Requisition Defaults page) Users must enter the Defaults (i.e. the chartstring(s) to which the item(s) is being charged) in the Requisition Defaults page first in order to properly save the requisition.</p> <p>Step 2: Enter Item (Requisition page) Enter the Item(s) to be ordered in the Requisition page;</p> <p>Step 3: Adjust ChartString (Schedule page) If necessary, users will adjust the Distribution of Funds (i.e. the ChartString(s) the item(s) is being charged to) on the Distribution page located in the Schedule page.</p> <p><i>NOTE: Changing the order of these steps may cause save errors which will result in the re-entering of the requisition by the Requester.</i></p>

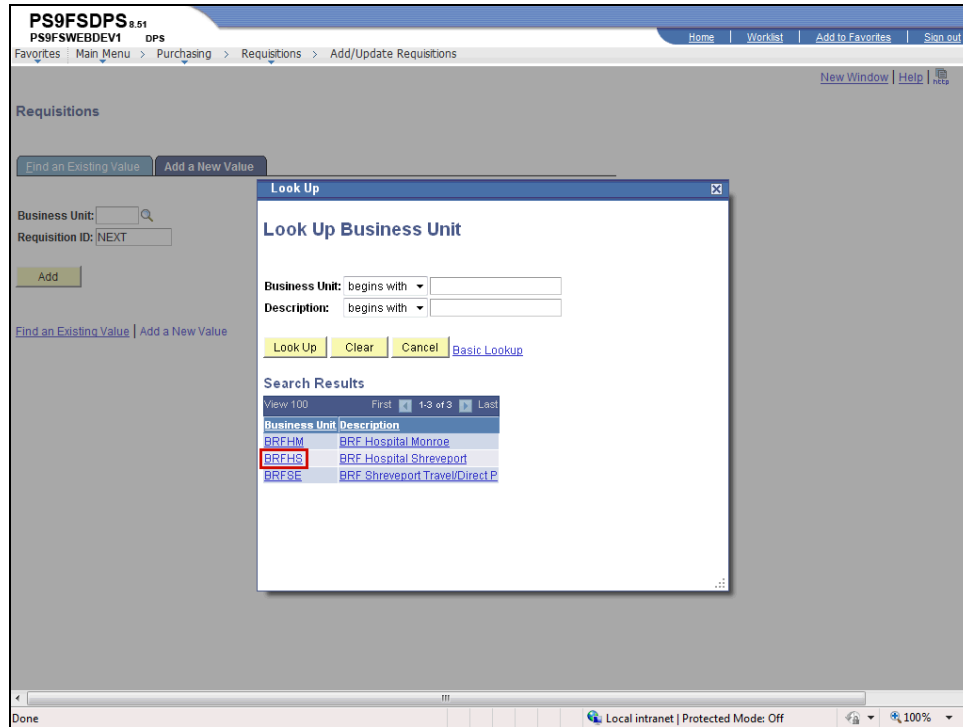



Step	Action
2.	Click the Main Menu button. 
3.	Click the Purchasing menu. 
4.	Click the Requisitions menu. 
5.	Click the Add/Update Requisitions menu. 
6.	<p>Requisition ID</p> <p>The Requisition ID should default as NEXT. This allows the system to auto-assign the requisition number. Once the requisition is entered and saved, the system will generate the next Requisition ID (number) assigned to the Business Unit. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned by Purchasing once the PO is generated.</p> <p><i>NOTE: Blanket Orders or Standing Orders will be entered in PeopleSoft one time to cover the entire year and thereafter, the Purchase Order number will be used to place additional orders for the year. See your buyer or Purchasing for more information about Blanket Orders or Standing Orders.</i></p>

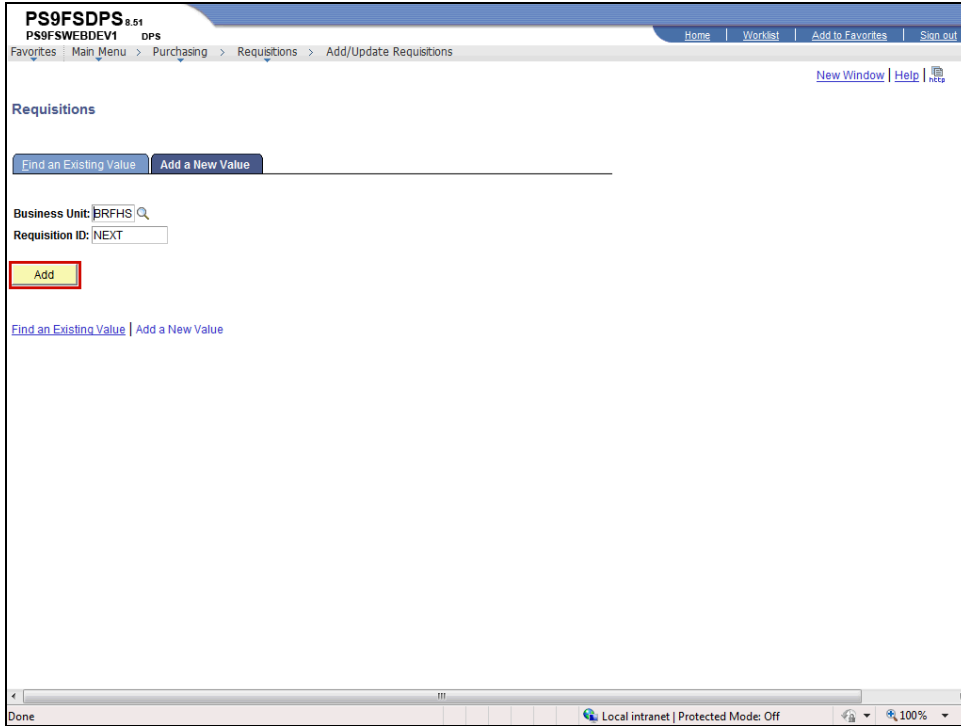
Step	Action
7.	<p>BRFHS Confirming Purchase Orders</p> <p>Enter the assigned requisition number in the Requisition ID field when creating a requisition assigned to a Confirming Purchase Order.</p>

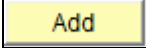


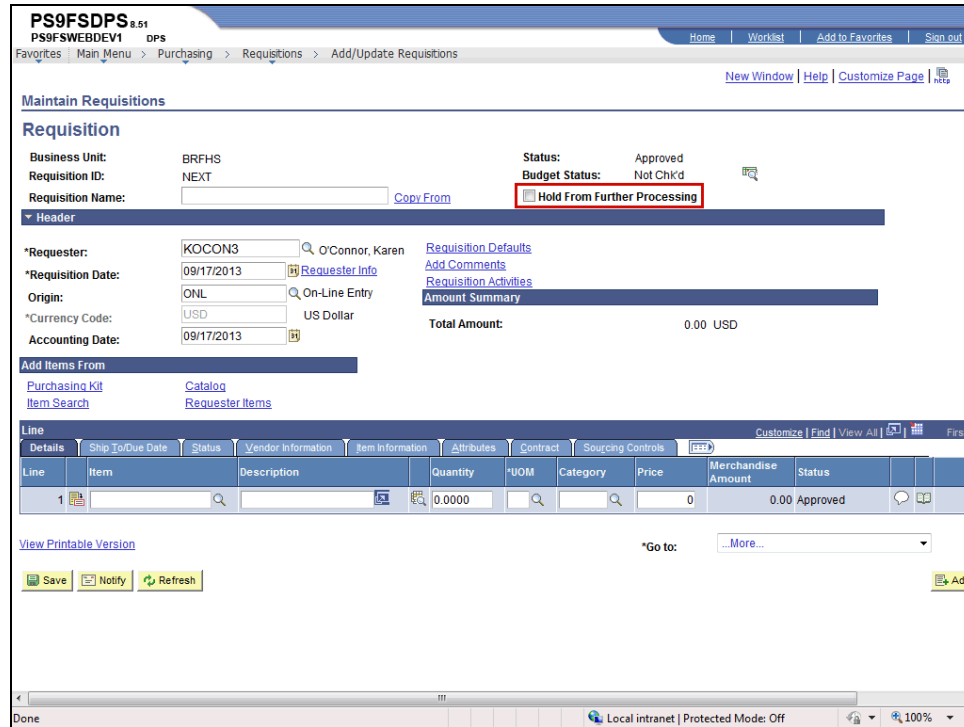
Step	Action
8.	<p>Click the Look up Business Unit button.</p> 





Step	Action
9.	Click the BRFHS link. 



Step	Action
10.	<p>Click the Add button.</p> <p><i>NOTE: To access and view an existing requisition, click the Find an Existing Value tab. See the "View a Requisition in the Activity Log" topic for instruction on how to find an existing requisition in the PeopleSoft system.</i></p> 
11.	<p>Status The Status should default as Approved.</p> <p>Budget Status The Budget Status field indicates whether the Budget Check process has been run. The Budget Check process must be run prior to Purchasing sourcing (i.e. generating) the Requisition to a Purchase Order or RFQ - Request for Quote (for bid). The Budget Status should default as Not Chk'd.</p>



Step	Action
12.	Click the Hold From Further Processing option to ensure that all additions/changes/deletions are made to the requisition before being sourced into a PO. 
13.	Requisition Name This field can be used to enter a description of the item(s) being purchased or free text. If the field is not populated upon saving the requisition id will populate to this field.
14.	The Requester (your User ID) should default into the page. If the Requester does not default, contact the Purchasing department so that the appropriate defaults can be set for entering future requisitions. You may enter the Requester or select it by clicking the Look Up Requester magnifying glass. If you enter the Requester, it must be entered in ALL CAPITAL letters.
15.	The Requisition Date defaults to the current date and may remain as defaulted. The Accounting Date also defaults to the current date. However, it may be adjusted as needed (e.g. when entering a requisition for the next fiscal year).
16.	View the links on the Maintain Requisitions page.



Additional Maintain Requisitions Page Links

Copy From link is used to copy a requisition from an existing requisition. *See the “Copying a Requisition from an Existing Requisition”* topic for instructions on how to use the **Copy From** link.

Add Comments link is used to add relevant information to the header section of the requisition, such as specific shipping or delivery instructions.

Requisition Activities link is not used by most end-users. You may enter notes here, but they will not print on the requisition.

Requester Info link is used to view the requester's full name, phone number, or fax number.

Document Status link is used to access other documents associated with the requisitions.

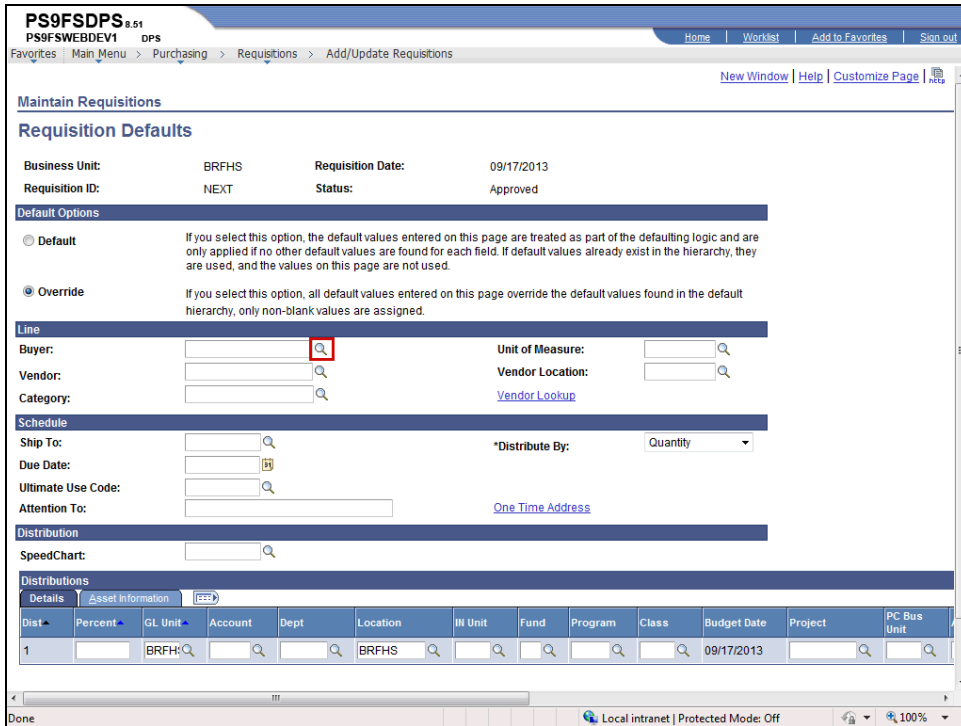
Purchasing Kit, Item Search, Catalog, and Requester Items links are not used at this time.

View Printable Version link is used to print your requisition.

View Approvals link is used to view the approval process for the requisition.

Step	Action
17.	<p>The Requisition Defaults link is used to enter default chartstring information.</p> <p>Click the Requisition Defaults link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px 0;">Requisition Defaults</div>
18.	<p>The Requisition Defaults page allows users to enter vendor, shipping, chartstring, etc. information on one page rather than for each line item. Information entered on this page will automatically be "defaulted" to each line item, thus minimizing data entry.</p> <p><i>NOTE: Only information that will apply to <u>all</u> lines of the requisition should be entered on the Requisitions Defaults page.</i></p>


Step	Action
19.	<p>Step 1: Enter Requisition Defaults</p> <p>You <u>must first enter</u> data into the Requisitions Defaults page for two reasons:</p> <ol style="list-style-type: none"> 1. In order to properly Save the requisition. If defaults are not entered before entering item(s) information, the requisition will not save and the requisition will have to be re-entered by the requester. 2. In order for the chartstring (s) to default to all line items. The chartstring values can be changed on any line item on the Distribution page. However, by entering the information on the Requisitions Defaults page, the system will automatically default the chartstring information to each line item on the requisition.
20.	<p>In the Defaults Options section, the Override option is selected as the default and should remain as is.</p>
21.	<p>Certain fields in the requisition are required fields, meaning the requisition cannot be saved if the field is left blank. Generally these fields have an asterisk next to the field name. There are a few fields, however, that are viewed as required fields by BRFHS that may not be designated with an asterisk.</p> <p>On this page you are required to enter information into the following fields: Buyer, Vendor, Ship To, Due Date, Account, Department and Location.</p>



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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page | 

Maintain Requisitions

Requisition Defaults






Business Unit: BRFHS Requisition Date: 09/17/2013
 Requisition ID: NEXT Status: Approved

Default Options





Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.


Line

Buyer:  Unit of Measure: 
 Vendor:  Vendor Location: 
 Category:  [Vendor Lookup](#)


Schedule











Ship To:  *Distribute By: 
 Due Date: 
 Ultimate Use Code: 
 Attention To: [One Time Address](#)




Distribution


SpeedChart: 

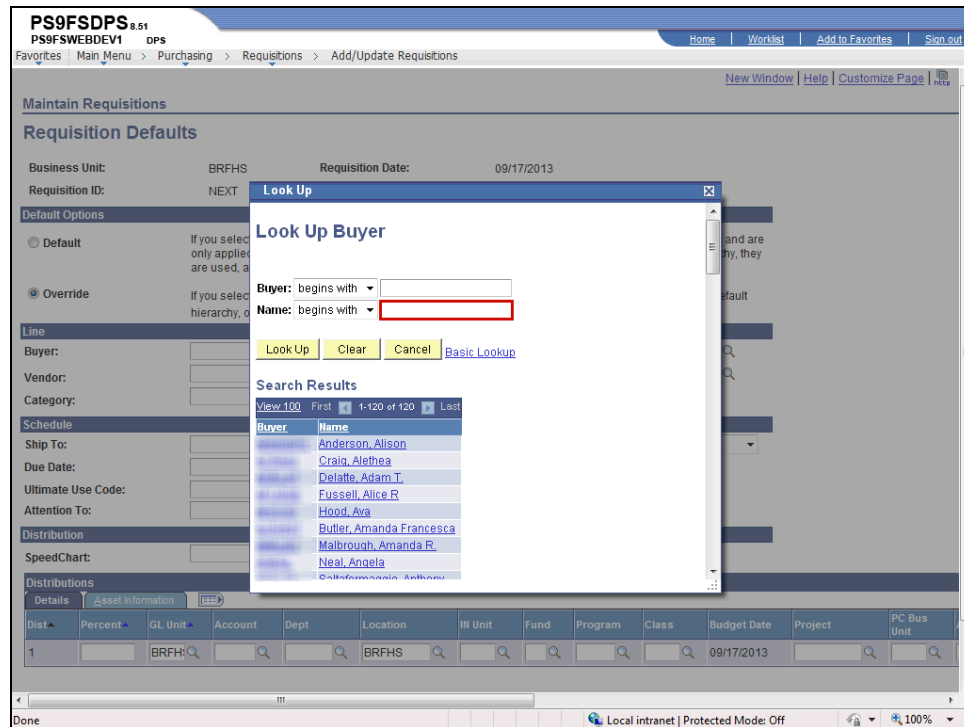
Distributions

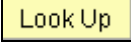

Details | Asset Information | 

Dist	Percent	GL Unit	Account	Dept	Location	Ill Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1		BRFH 	<input type="text"/> 	<input type="text"/> 	BRFHS 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	<input type="text"/> 	09/17/2013	<input type="text"/> 	<input type="text"/> 

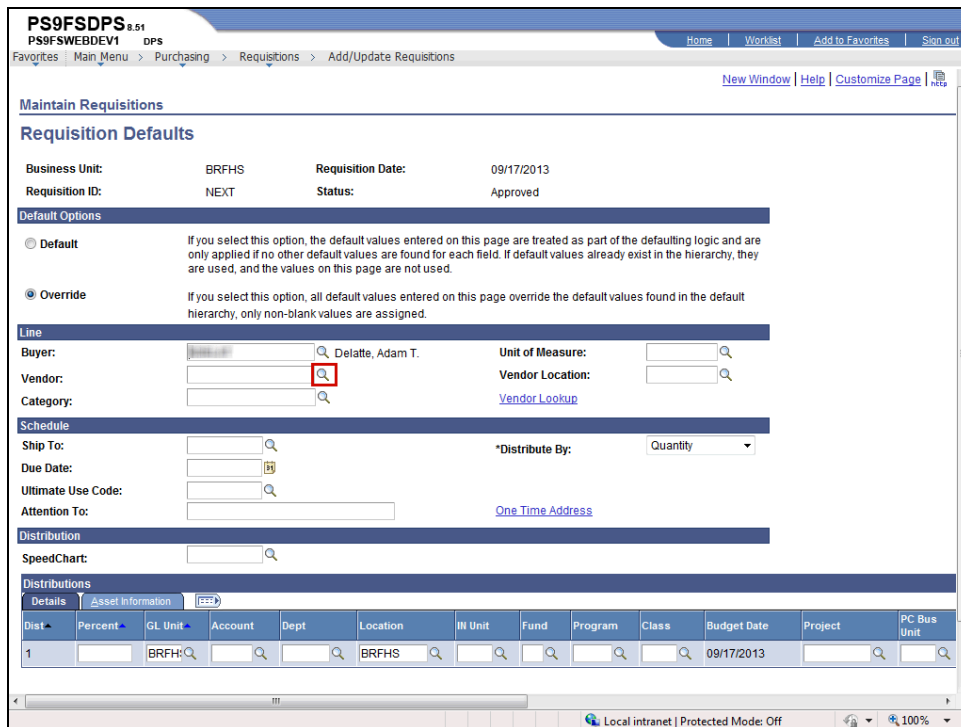
Done Local intranet | Protected Mode: Off    100%


Step	Action
22.	<p>If you know the buyer's UserID, you may enter it directly into the field. The UserID must be typed in ALL CAPS.</p> <p>If you do not know the buyer's UserID, you may search for it by clicking the Look up Buyer (magnifying glass) to the right of the Buyer field.</p> <p>Click the Buyer button.</p> 

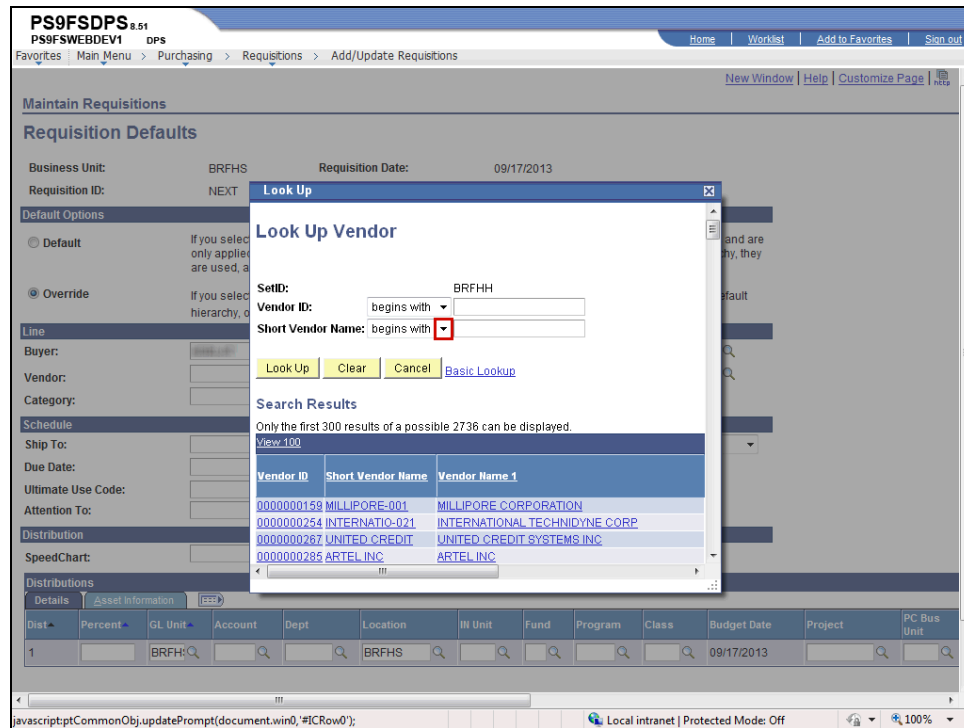



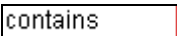


Step	Action
23.	<p>Enter the desired information into the Name field. Enter "Buyer's Last Name".</p> <p><i>NOTE: If you enter the full name, the name must be entered in proper PeopleSoft format (i.e. last name, first name with no space between).</i></p> <p><i>See "Using the Look Up Feature" topic for instruction on how to search for information in the database.</i></p>
24.	<p>Click the Look Up button.</p> <p></p>
25.	<p>A name or list of names will display in the Search Results area. Click the Delatte, Adam T. link.</p> <p></p>
26.	<p>Press the Tab key to move from field to field within PeopleSoft. The Enter key cannot be used to move from field to field. The Enter key acts as a Save button, so do not use it when entering requisition information.</p>
27.	<p>The Unit of Measure field will be left blank on the Requisition Defaults page. You will enter the Unit of Measure in the Line Details on the Maintain Requisitions page.</p> <p><i>NOTE: Entering the Unit of Measure on the Requisition Defaults page may cause problems with saving the requisition.</i></p>

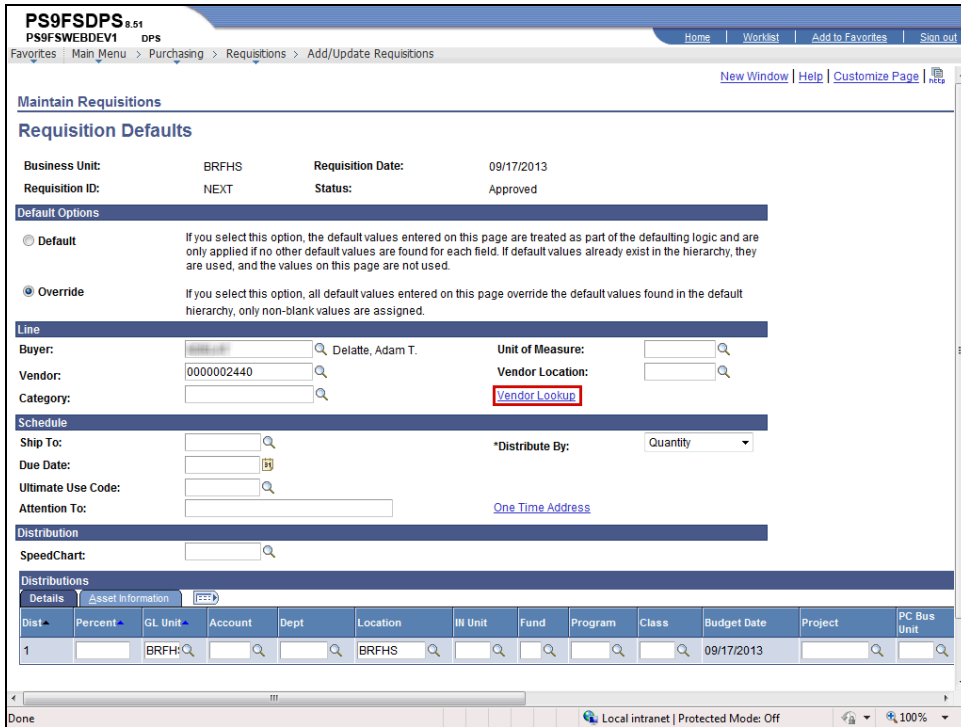
Step	Action
28.	A requisition can have only one vendor. Although the Vendor field is not a required field, the requester must provide information about the vendor to Purchasing. The Vendor ID is used to designate the Vendor for the requisition. The vendor id is always a 10-digit number in PeopleSoft. Users can enter the vendor id directly into the Vendor field or can utilize the Look up Vendor to search for it.
29.	If the Vendor ID is unknown, the requester should attempt to locate the vendor in the database. If the vendor does not appear in the list of vendors in the PS system, the Vendor field may be left blank. However, vendor information must then be entered in the Header Comments page and include as much of the following information as is known: the vendor's name, contact person, street address, city, state, zip code, telephone number, fax number and Tax ID Number. <i>NOTE: Entering information in the Header Comments page is shown in the Add, Change and Delete Comments topic.</i>



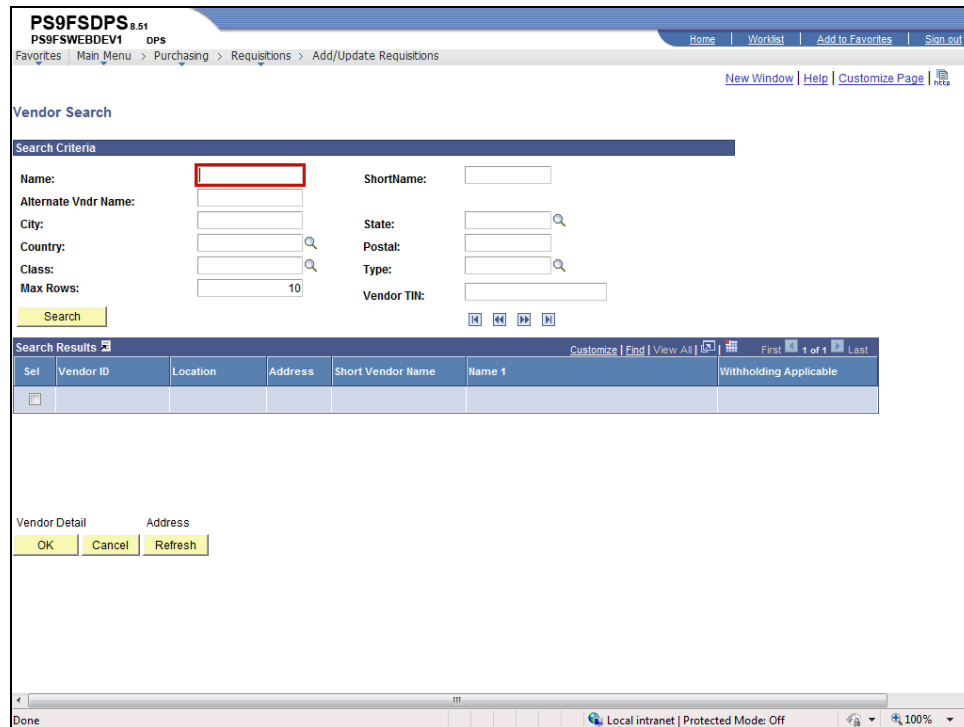
Step	Action
30.	For this example, the vendor id is unknown but can be found in the PS Database. Click the Look up Vendor button. 
31.	<i>See Using the Look Up Feature topic in the Requisition Basics section for information on how to use the Look up feature to search for a vendor.</i>

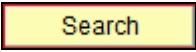





Step	Action
32.	Click the Short Vendor Name list. 
33.	Click the contains list item. 
34.	Enter the desired information into the Short Vendor Name field. Enter " OFFICE ".
35.	Click the Look Up button. 
36.	Click the 0000002440 link. 
37.	When the Vendor field contains a value, the Vendor name will default to the right of the Vendor field. The Vendor Location will also default into the page. The Vendor Location will remain as defaulted. If the vendor has multiple locations, you must advise Purchasing as to where to send the Purchase Order by entering the location address in the Header Comments section. <i>Entering information in the Header Comments page is shown in the Add, Change and Delete Comments topic.</i>

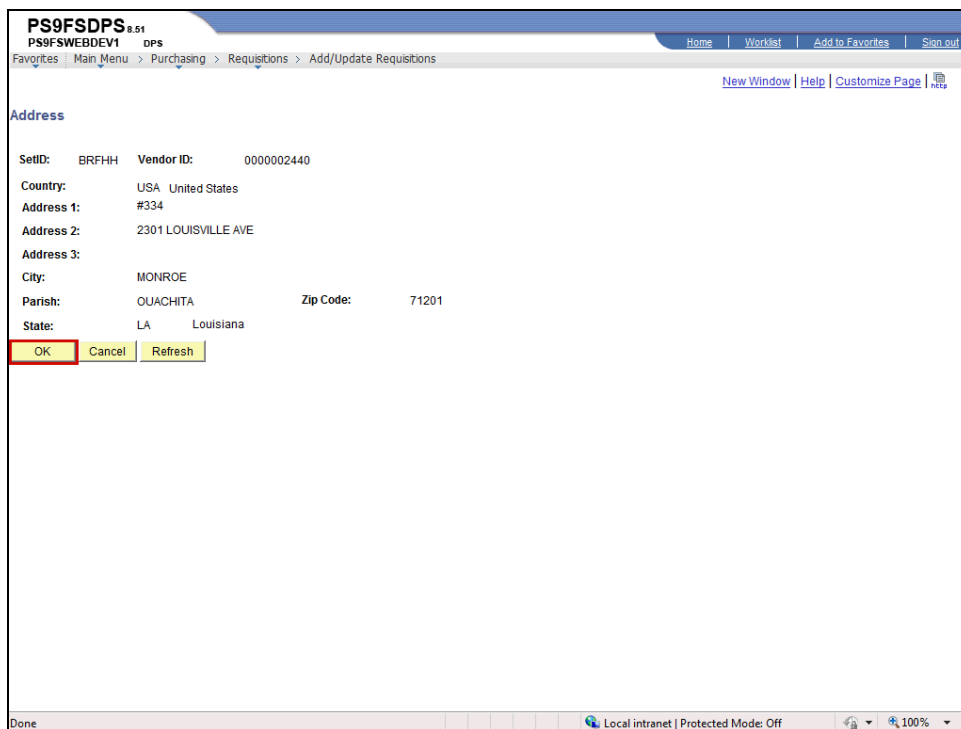


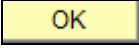
Step	Action
38.	<p>Another alternative for finding a vendor in the database is utilizing the Vendor Lookup link. The Vendor Lookup link allows you to search for a vendor using detailed criteria such as Name, Short Vendor Name, City, State, Country, Postal, Vendor TIN (Tax Identification Number), etc.</p> <p>Click the Vendor Lookup link.</p> <p><i>NOTE: The Vendor Lookup can also be used to locate the address for a vendor that has multiple locations.</i></p> <p>Vendor Lookup</p>

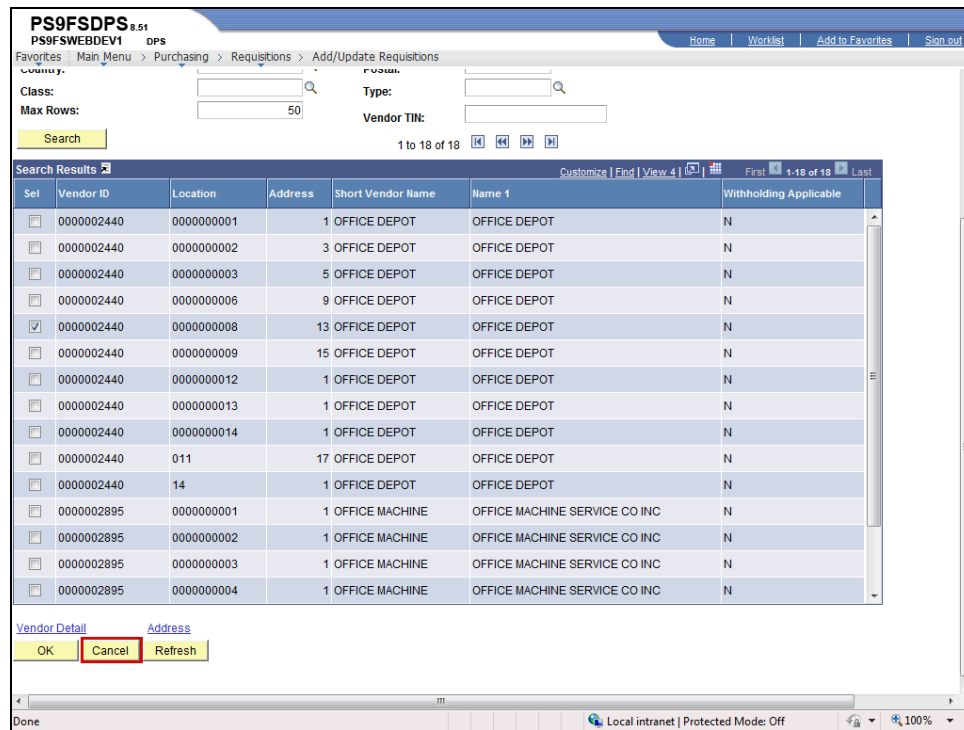


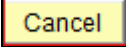
Step	Action
39.	You may do a full or partial search on any field(s) on the Vendor Search page. Enter the desired information into the Name field. Enter " OFFICE% ".
40.	Enter the desired information into the City field. Enter " LA ".
41.	You may change the number of rows that will be viewed in the Max Row field. In this example will change the Max Rows from 10 to 50. Enter the desired information into the Max Rows field. Enter " 50 ".
42.	Click the Search button. 
43.	The first four (4) vendor options display in the Search Results area. There are a total of 18 options available in this example, so the desired vendor may not appear on the first page. Click the View All link. 

Step	Action
44.	<p>In this example there is more than one Office Depot option. The information provided in the Search Results area is not sufficient to determine which Office Depot option to select. You will need to look through the various options to find the one you desire.</p> <p>Click the Sel option.</p> 
45.	<p>Once an option has been selected, the Vendor Detail and Address options become links enabling you to view vendor information such as the location address.</p> <p>Click the Address link.</p> <p>NOTE: The Vendor Detail link does not provide address information.</p> 



Step	Action
46.	<p>The address the selected vendor option displays.</p> <p>If this is the desired vendor, the address would be entered in the Header Add Comments section.</p> <p>Click the OK button.</p> 
47.	<p>If the selected option is not the correct vendor, simply click the next option in the list and click the Address link to view information for the next vendor/location.</p> <p>Repeat these steps until the desired vendor/location is found.</p>




Step	Action
48.	<p>Click the Cancel button.</p> <p><i>NOTE: The defaulted location code on the Requisition Defaults page should never be changed, so the Cancel button will always be selected.</i></p> 
49.	<p>The Category field will remain blank on the Requisition Defaults page. The Category code will be entered in the Line Details on the Maintain Requisition page.</p> <p><i>NOTE: Entering Category information on the Requisition Defaults page may cause problems with saving the requisition.</i></p>

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page | 

Maintain Requisitions

Requisition Defaults

Business Unit: BRFHS Requisition Date: 09/17/2013
 Requisition ID: NEXT Status: Approved

Default Options




Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.


Line

Buyer: Delatte, Adam T. Unit of Measure:
 Vendor: 0000002440 OFFICE DEPOT Vendor Location: 14
 Category: [Vendor Lookup](#)


Schedule



Ship To:  *Distribute By: Quantity
 Due Date: 
 Ultimate Use Code: 
 Attention To: [One Time Address](#)


Distribution


SpeedChart: 

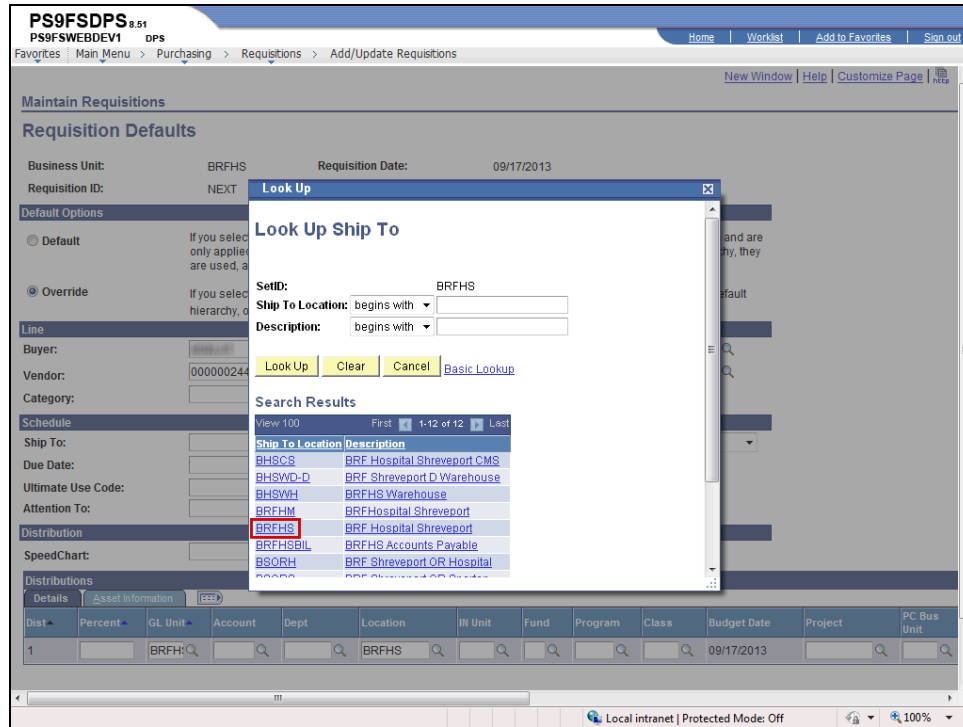
Distributions

Details | Asset Information | 

Dist	Percent	GL Unit	Account	Dept	Location	Ill Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1	<input type="text"/>	BRFH: 	<input type="text"/>	<input type="text"/>	BRFHS 	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	09/17/2013	<input type="text"/>	<input type="text"/>

Local intranet | Protected Mode: Off  100%

Step	Action
50.	<p>The Ship To is the Business Unit location designation where the item(s) will be delivered.</p> <p>Click the Ship To button.</p> 




Step	Action
51.	Click the BRFHS link. BRFHS

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page | 

Maintain Requisitions

Requisition Defaults

Business Unit: BRFHS Requisition Date: 09/17/2013
 Requisition ID: NEXT Status: Approved

Default Options

Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer: Delatte, Adam T. Unit of Measure:
 Vendor: 0000002440 OFFICE DEPOT Vendor Location: 14
 Category: [Vendor Lookup](#)

Schedule

Ship To: BRFHS BRF Hospital Shreveport *Distribute By: Quantity
 Due Date: **DD**
 Ultimate Use Code:
 Attention To: [One Time Address](#)



Distribution


SpeedChart:

Distributions

Details Asset Information [REF](#)

Dist	Percent	GL Unit	Account	Dept	Location	Inv Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1	<input type="text"/>	BRFH	<input type="text"/>	<input type="text"/>	BRFHS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	09/17/2013	<input type="text"/>	<input type="text"/>

Local intranet | Protected Mode: Off   100%

Step	Action
52.	Click the Due Date button. 



Due Date

Although the Due Date is not a required field in order to save the requisition and generate a requisition number, the end-user **must** enter the Due Date as discussed below. The Due Date is the date you expect to receive the merchandise.

- **One Time Orders:** The Due Date is the expected delivery date.
- **Blanket Orders or Standing Orders:** The Due Date is the last day of the last month you expect to receive the merchandise.

The following are two examples:

1. If you have a **Standing Order** for the delivery of 10 cases per month for 3 months beginning September and ending November, the Due Date would be the last day of November.
2. If you have a **Blanket PO** for rental equipment or supplies where the contract period is through the end of the fiscal year, the Due Date would be the last day of June.

Date Boxes


Enter a date by one of the following methods:

1. To enter today's date, enter a **T** in the date field and click **Refresh**.
2. To view the calendar and select the date, click the Calendar icon next to the Due Date field. Select the month and year if necessary then click on the desired date.
3. Enter the date (mm/dd/yy) – PeopleSoft requires that **6 digits** be entered, but the user **does not** have to type the slashes (e.g. 120105). The slashes will populate once the user clicks the Refresh button or moves to another page (this includes actually navigating to another page or clicking the search button on another field on the same page, since searching on a field actually brings you to another page).


Enter a Requisition for the Next Fiscal Year

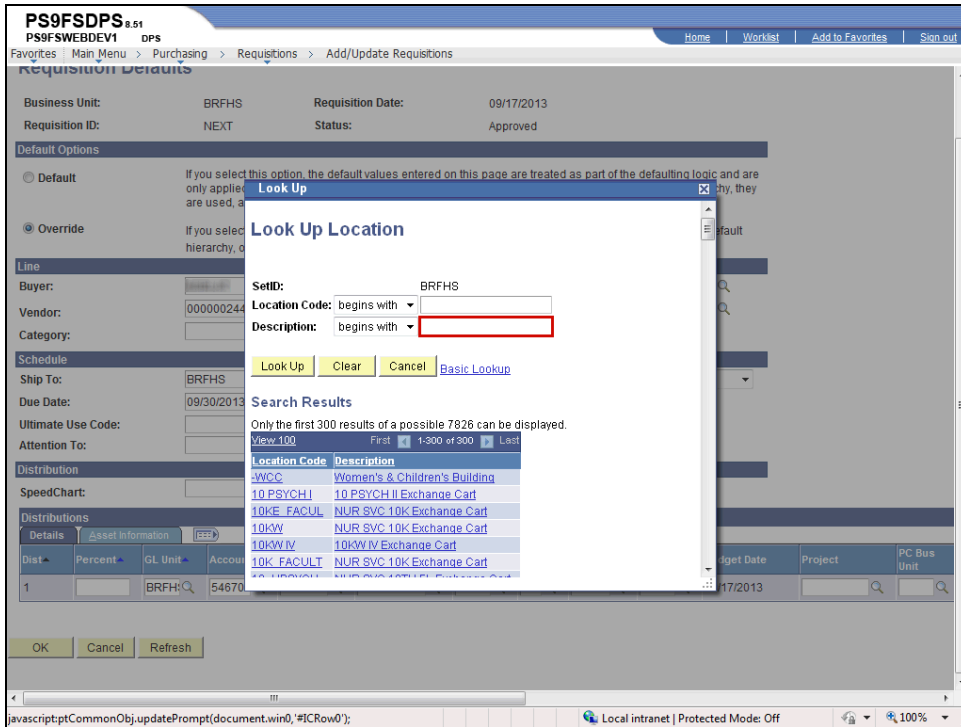
When a requisition is entered for the next fiscal year, the Due Date **must** be changed as follows:



- Due Date will be entered July 1st (07/01/XX) or later of the next fiscal year. A warning message may display advising the date is "out of range" (i.e. more than 30 days from the original date). When the warning message is received, click OK.

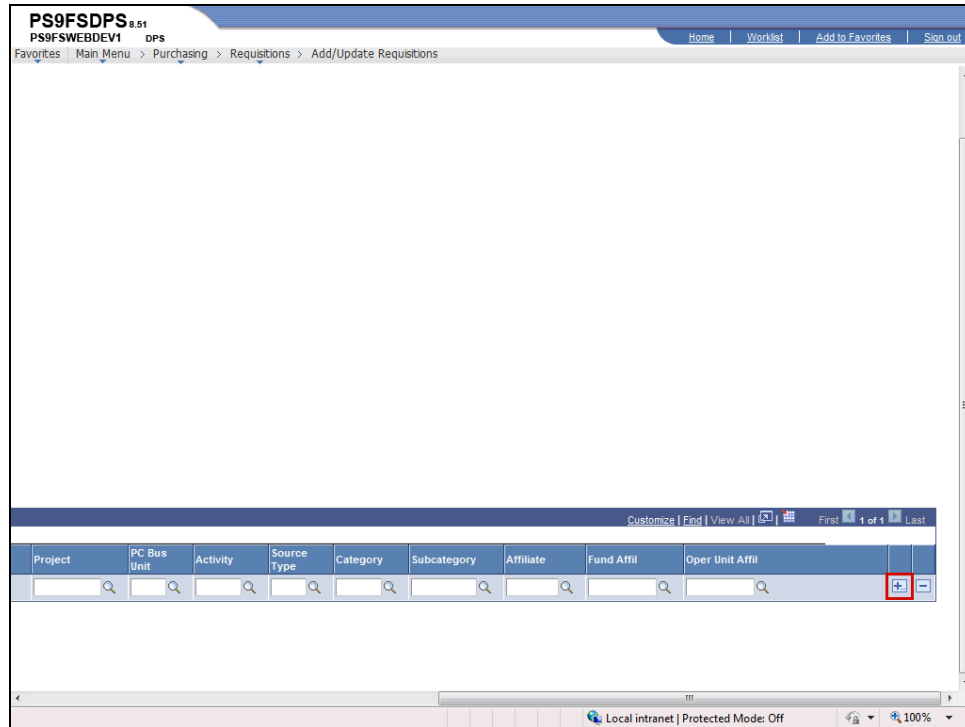
Step	Action
53.	Click the desired date. 


Step	Action
54.	<p>Distribute by</p> <p>Funds are distributed either by Quantity or Amount. The distribution method is important when:</p> <ol style="list-style-type: none"> 1. An item(s) is being charged to more than one account or department; or 2. An item(s) is a product or a service. Most blanket purchase orders are distributed by Amount.
55.	<p>The Distribute by can be designated either on the Requisition Defaults page or the Distribution page. When entering multiple line item requisitions, if the distribution method is designated one way on the Requisitions Defaults page, you can change the distribution option on the Distribution page for a specific line item. Changing the distribution method on the Distribution page will be shown later in this topic.</p> <p><i>Contact your Buyer for additional information about distributing funds by Quantity or Amount.</i></p>
56.	<p>In this example, you will distribute by Quantity, so the Distribute by will remain as defaulted. Distributing funds by Amount is shown later in this topic.</p>
57.	<p>The Ultimate Use Code, Attention To and SpeedChart fields will remain blank. The One Time Address link is not used at this time.</p>
58.	<p>Enter ChartString Values</p> <p>You will enter the ChartString combination to which the item(s) is being charged in the Distribution section of the Requisition Defaults page. If there are multiple items being ordered, each line on the requisition can have a different ChartString value. Therefore, the various ChartString values will only be entered on the Requisition Defaults page if they apply to most items ordered on the requisition.</p> <p><i>NOTE: If chartstring information is not entered on the Requisition Defaults page, it must be entered on the Distribution page for each line item on the requisition.</i></p>
59.	<p>Account Code</p> <p>The Account Code is a transaction code for the item(s) being ordered (e.g. computer, office supplies, medical supplies, etc.). Lines on a requisition may have different Account Codes and the correct Account Code must be entered on each line item.</p> <p><i>NOTE: If you are ordering multiple items on the requisition and each item has a different Account Code, you should leave the Account Code field blank on the Requisition Defaults page. You must then enter the appropriate Account Code in the Distribution page for each line item. If most of the line items have the same Account Code, you may opt to enter the Account Code that applies to most of the line items on the Requisition Defaults page. You would then need to change the Account Code for those items requiring a different Account Code on the Distributions page.</i></p> <p><i>Contact your Finance/Accounting group for a list of account codes.</i></p>

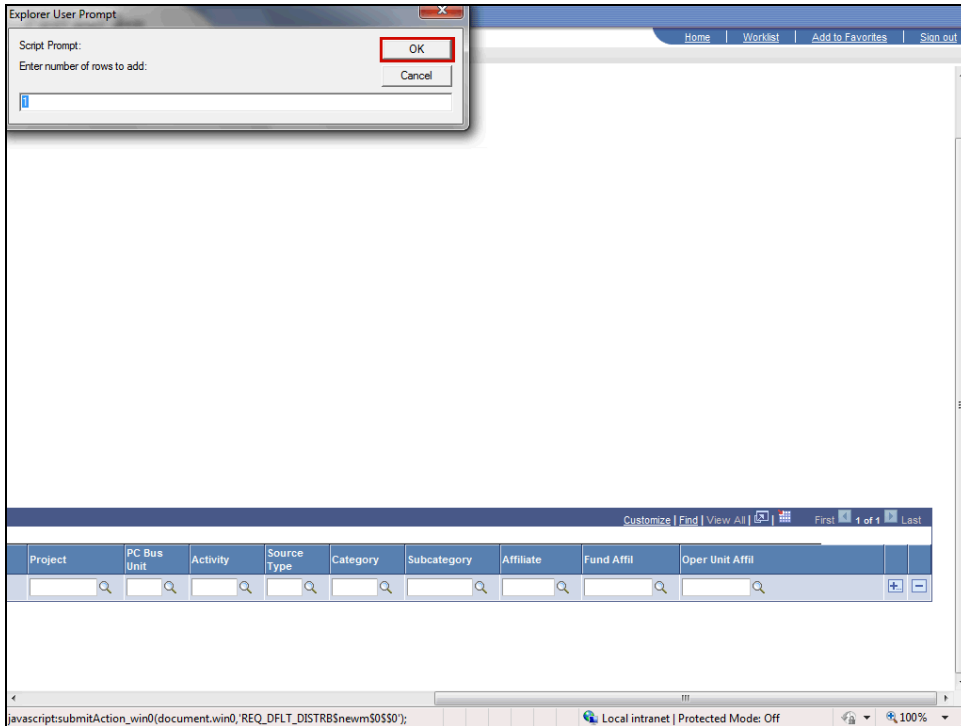
Step	Action
60.	<p>In this example, the Account Code for Office Supplies, General will be used.</p> <p>Enter the desired information into the Account field. Enter "546700".</p>
61.	<p>The Dept is the cost center paying for the item(s). The Dept is always a 7-digit department number.</p> <p>Enter the desired information into the Dept field. Enter "2036380".</p>
62.	<p>Location</p> <p>The Location is a business unit designation.</p> <p><i>For BRFHM, the Location can be a 7-digit department number, or an alphanumeric location code (e.g. MH011060)</i></p>
63.	<p>BRFHS</p> <p>BRFHS uses an 8-10 alphanumeric code, so the default will be changed for all BRFHS requisitions. Each department has an assigned code. Below are examples of two BRFHS Location codes:</p> <ol style="list-style-type: none"> 1. Surgery Department - MB010303: MB designates Medical B building, 01 designates that it is located on the 1st floor of the building, and 0303 is room 303; or 2. Hospital Anesthesiology - HH03H0015A: HH designates Hospital H wing, 03 designates it is located on the 3rd floor, and H0015A is room H315A.
64.	<p>Click the Look up Location button.</p> 

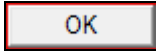


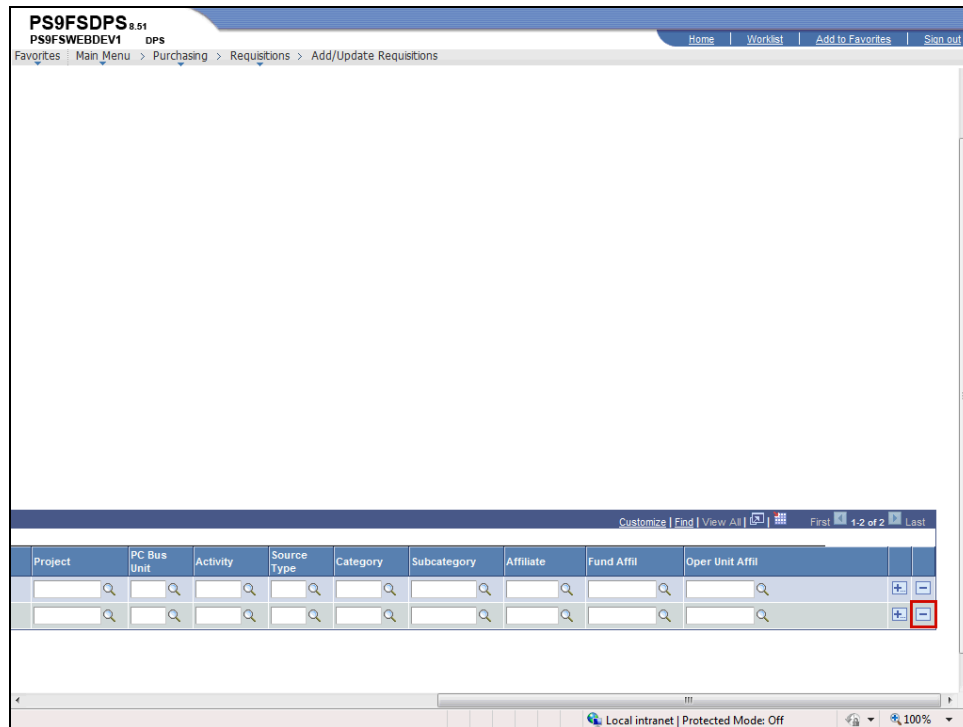
Step	Action
65.	Enter the desired information into the Description field. Enter " NEURO ".
66.	Click the Look Up button. 
67.	Click the N20G0100 link. 
68.	Enter Multiple ChartStrings Items can be charged to more than one chartstring; for instance if more than one department is paying for an item. More than one chartstring can be entered on the Requisition Defaults page if the added chartstring will apply to most of the line items on the requisition. If the added chartstring does not apply to most of the line items, it should not be added on the Requisition Defaults, but instead should be entered on the specific line item's Distribution page.


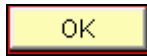
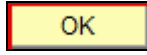


Step	Action
69.	Click the Add multiple new rows at row 1 button. 

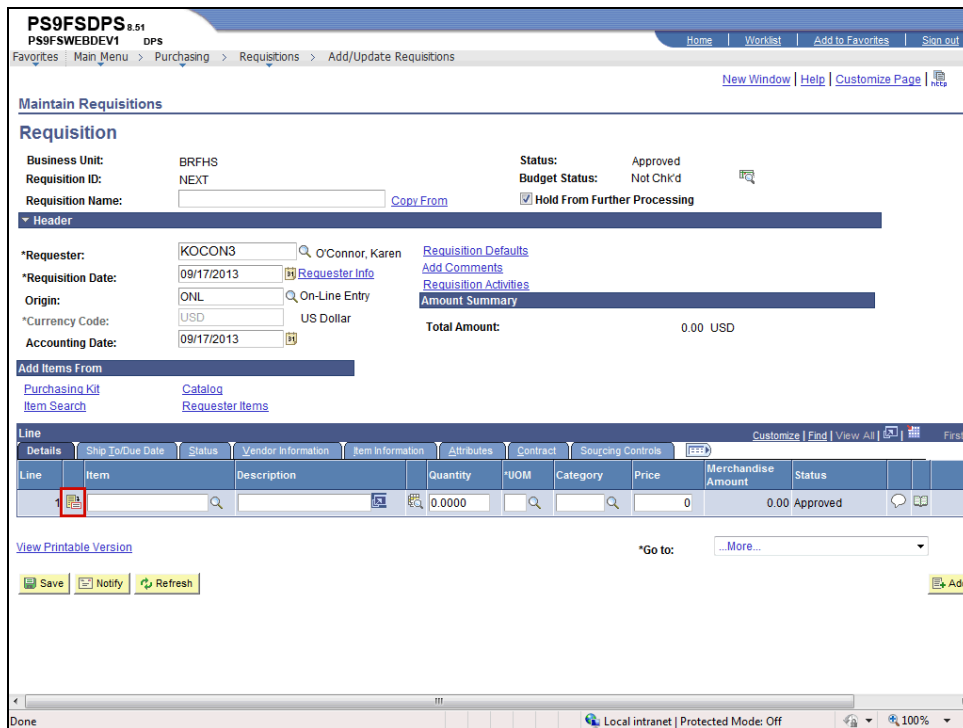



Step	Action
70.	<p>A prompt box will display asking you to enter the number of rows you wish to add. The prompt will default to 1. Add only the number of rows needed as the system will not save blank lines.</p> <p>Click the OK button.</p> 
71.	<p>The new row displays. Line 2 has all the same chartstring values (Account, Department, and Location) as line 1. <i>One or more of the chartstring values on line 2 must be changed for a second chartstring to be charged.</i></p>
72.	<p>Percent</p> <p>When the cost of an item(s) is split between more than one chartstring, the percentage to be applied to each must be designated using the Percent field. When the new row is added, the system still assigns 100% of the cost to the original chartstring. You will need to change that percentage based on how funds will be split (e.g. 50% charged to line 1 and 50% to line 2).</p>

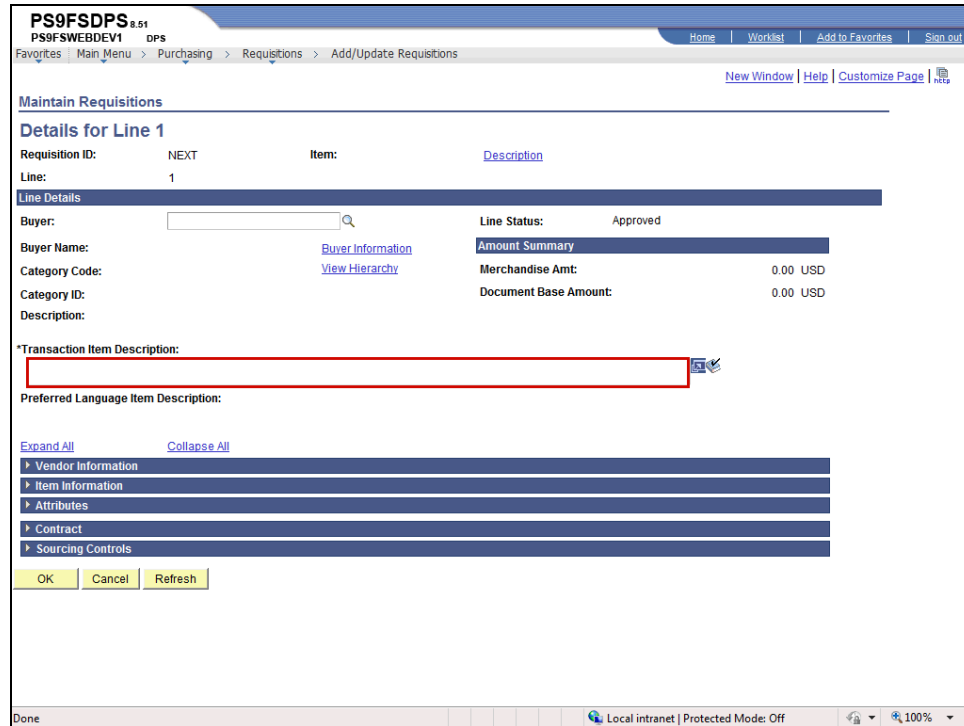




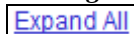
Step	Action
73.	<p>Adding a new chartstring will be demonstrated later in this topic.</p> <p>Click the Delete row 2 button.</p> 
74.	<p>A warning message displays to confirm the delete.</p> <p>Click the OK button.</p> 
75.	<p>Once all default information has been entered on the page, click the OK button to return to the Maintain Requisitions page.</p> 
76.	<p>Step 1: Entering Requisition Defaults is complete.</p> <p>Step 2: Enter Item(s) on the Requisition page will now be demonstrated.</p>

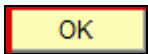
Step	Action
77.	<p>Description</p> <p>A description must be entered for each line item. You may enter the description directly into the Description field or in the Transaction Item Description box located on the Details page.</p> <p><i>NOTE: Only 20 characters can be viewed in the Description field at a time. Users should enter description information in the Transaction Item Description box if more than 20 characters are needed.</i></p>

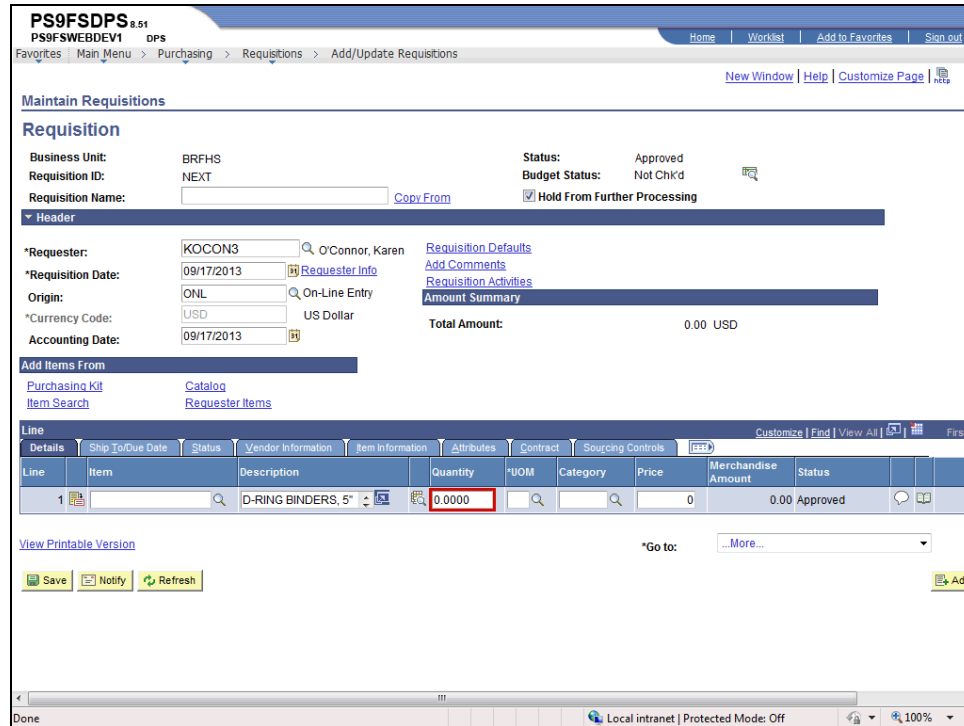


Step	Action
78.	<p>Click the Details... button.</p> 
79.	<p>Transaction Item Description</p> <p>The Transaction Item Description is a required field and is a free-text edit box (i.e. there is no drop-down arrow from which to select a value). All description information must be entered in ALL CAPS.</p> <p>You can enter up to 254 characters (this includes spaces) into the field. The system will allow you to enter more than 254 characters, but will then automatically truncate it down to 254 characters.</p>



Step	Action
80.	Enter the desired information into the Spell Check Transaction Item Description field. Enter " D-RING BINDERS, 5" RINGS, BLUE ".
81.	<p>Spell Check</p> <p>The blue book with the checkmark to the right of the Transaction Item Description is the spell check feature for the field. The spell check works similarly to spell check used for Word and other Microsoft applications.</p> <p>Click the Preferred Language Item Description button.</p> 
82.	<p>Click the OK button.</p> 
83.	<p>Below the Transaction Item Description box are five collapsed sections: Vendor Information, Item Information, Attributes, Contract, and Sourcing Controls.</p> <p>Click the Expand All link to expand all five sections at one time. Click the Collapse All link to minimize all five sections.</p> <p>NOTE: You may opt to expand or collapse the five sections individually by clicking on the Expand Section arrows located to the left of each section title.</p> 


Step	Action
84.	<p>The window expands to reveal more fields. Although most end-users will not enter information into these fields, you may enter information pertinent to the line such as Vendor's Catalog or Vendor Item ID.</p> <p><i>NOTE: The Manufacturers ID, Description, Manufacturer's Item ID and UPN ID fields should not be used.</i></p>
85.	<p>If you know the requisition will need to go out for bid, click the checkbox in front of the RFQ Required (Request for Quote) field for each line in the distribution. If you are unsure as to whether or not the requisition will go out for bid, do not check the RFQ Required field.</p>
86.	<p>Click the OK button to return to the Maintain Requisitions page.</p> 
87.	<p>When entering requisition items, the Item field will always be left blank.</p>



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New Window | Help | Customize Page | 

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved
 Requisition ID: NEXT Budget Status: Not Chkd
 Requisition Name: Copy From Hold From Further Processing

▼ Header

*Requester: KOCONG O'Connor, Karen [Requisition Defaults](#)
 *Requisition Date: 09/17/2013 [Requester Info](#) [Add Comments](#)
 Origin: ONL On-Line Entry [Requisition Activities](#)
 *Currency Code: USD US Dollar [Amount Summary](#)
 Accounting Date: 09/17/2013 Total Amount: 0.00 USD

Add Items From

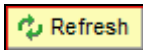
[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)


Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	0.0000			0	0.00	Approved

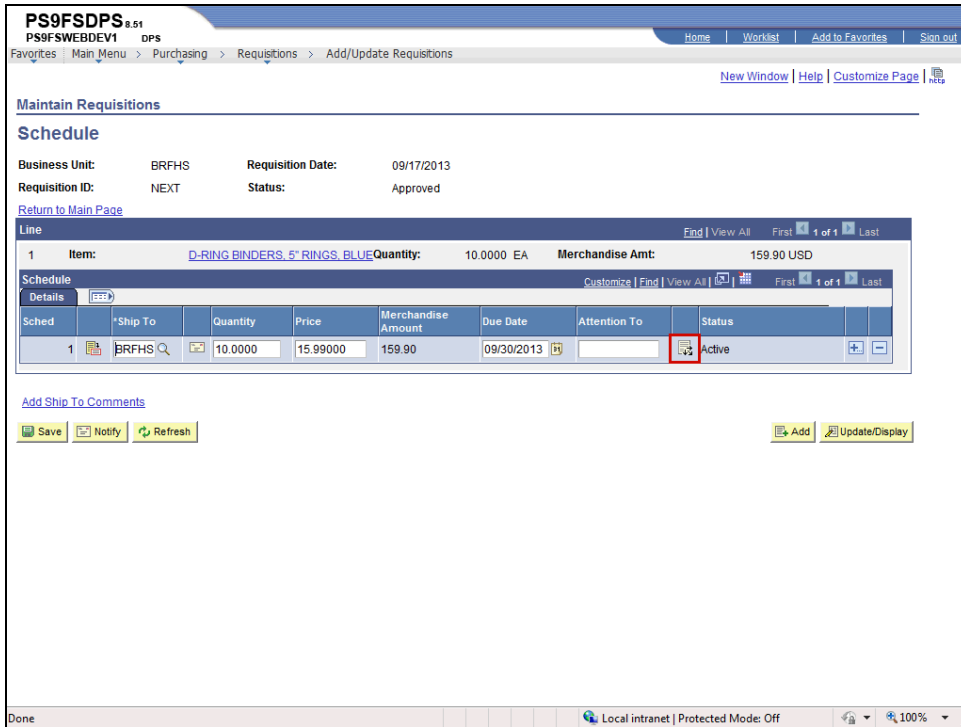
View Printable Version *Go to: More...


Done Local intranet | Protected Mode: Off 100%

Step	Action
88.	<p>Quantity</p> <p>The Quantity must be entered as whole numbers (e.g. 10 or 11 rather than 10.5).</p> <p><i>NOTE: Delete the value in the Quantity field before entering the new value to prevent keying errors. The system will automatically populate the decimal point and trailing zeros when the page is refreshed (i.e. 10.0000).</i></p> <p>Enter the desired information into the Quantity field. Enter "10".</p>
89.	<p>Unit of Measure</p> <p>The UOM (Unit of Measure) is a required field and may be entered in upper, lower or mixed case. The system will automatically change the UMO to upper case when the page is refreshed. You may also search for the UOM by clicking the magnifying glass to the right of the UOM field. Do not select a unit of measure that contains both alpha characters and numbers, such as B01 or C05.</p> <p>Enter the desired information into the UOM field. Enter "EA".</p>

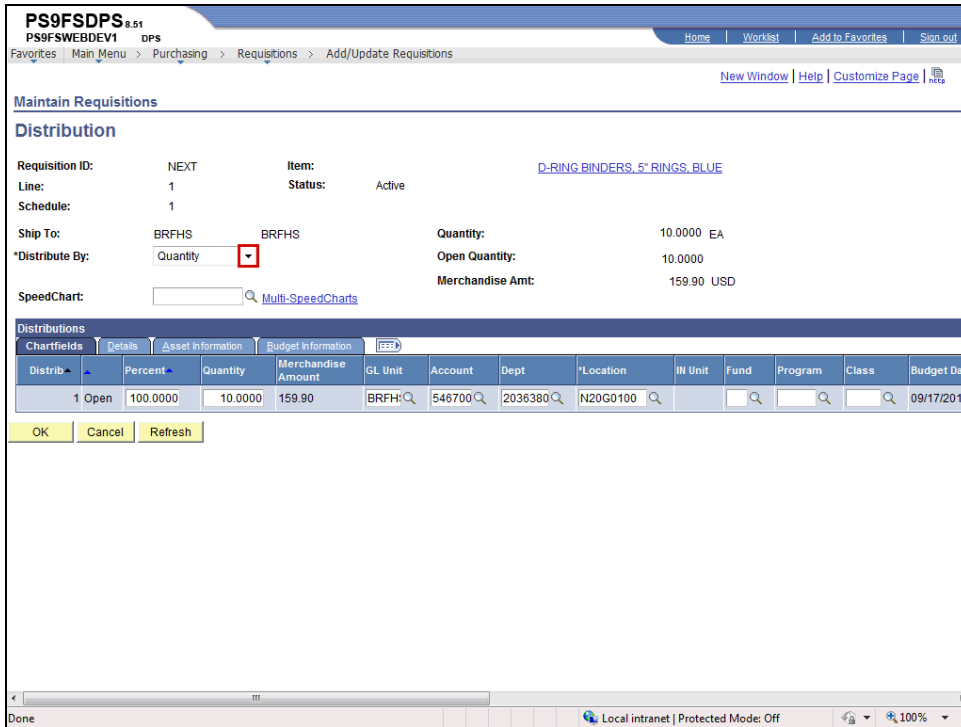
Step	Action
90.	<p>Category</p> <p>The Category code will be 00000 (Generic Item Category) in the Category field and the Purchasing Department will change it at the P.O. level.</p> <p>Enter the desired information into the Category field. Enter "00000".</p>
91.	<p>Price</p> <p>When entering the cost of an item into the Price field, you must enter the decimal point to indicate cents (e.g. 15.99).</p> <p>Enter the desired information into the Price field. Enter "15.99".</p>
92.	<p>NOTE: It is recommended that users Refresh the page after entering data for each line to validate the information entered.</p> <p>Click the Refresh button to update fields.</p> 
93.	<p><i>The total amount of item(s) ordered on Line 1 will display in the Merchandise Amount field.</i></p>
94.	<p>Line 1 Icons</p> <p>The Line Comments button (comment bubble icon) may be used to enter comments specific to the line item (e.g. special delivery or shipping instruction or additional space for item description if needed).</p> <p>NOTE: Line Comments may be entered at any time but for training purposes will be demonstrated in the Add, Change, and Delete Comments topic.</p>
95.	<p>Line 1 Icons (continued)</p> <p>The Line Defaults button (the open book icon) is not used.</p> <p>The Schedule button (the page with red lines and a clock icon) is used to access the Distribution page to adjust ChartString information entered on the Requisition Defaults page if needed.</p>
96.	<p>Line 1 Icons (continued)</p> <p>The Plus (+) and Minus (-) signs located on the far right of Line 1 allow you to add or delete row(s) from the requisition.</p> <p>NOTE: It is <u>not</u> necessary to return to the Requisition Defaults page when adding rows to the requisition. Begin at Step 2: Enter Items to be Ordered.</p>


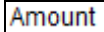

Step	Action
97.	<p>Go to</p> <p>The Go to field is used to view the Activity Log, which allows you to view the status of saved requisitions.</p> <p><i>See the View the Requisition and Activity Log topic for additional information.</i></p>
98.	<p>The Tabs above Line 1 (Ship To Due Date, Status, Vendor Information, Item Information, Attributes, Contract, and Sourcing Controls) provide a compilation of the information entered into the requisitions. The system automatically defaults needed information into the tabs.</p> <p><u>NOTE:</u> <i>Users should <u>never</u> change any information on these tabs.</i></p>
99.	<p>Step 3: Adjust ChartString (Schedule Page)</p> <p>You can adjust the distribution of funds (i.e. the ChartString(s) to which the item(s) is being charged) on the Distribution page. You must first access the Schedule page to get to the Distribution page.</p> <p>Click the Schedule... button.</p> 
100.	<p>If you need to add additional shipping or delivery instructions such as entering more than one Ship To location, or the name of the person receiving the item(s), you may utilize the Add Ship To Comments link.</p> <p><i>NOTE:</i> <i>You may also include this information in Line Comments if applicable to only a single line item.</i></p>

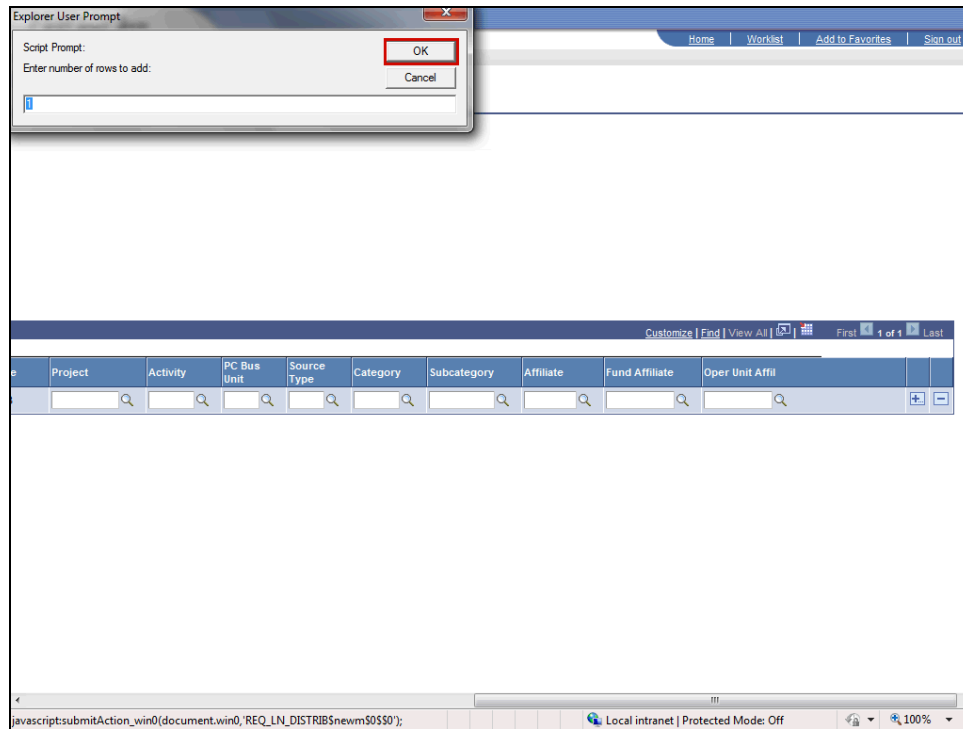


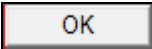
Step	Action
101.	Click the Distribution button. 
102.	<p>Distribution</p> <p>Chartstring information entered on the Requisition Defaults page automatically displays on the Distribution page for all line items. Thus, the Distribution page allows users to view and adjust chartstring values for a specific line item.</p> <p>Each line item can have the same chartstring or a different chartstring. Depending on whether the chartstring is the same or different will determine what information, if any, will be entered on a line item's Distribution page.</p>

Step	Action
103.	<p>For example:</p> <ol style="list-style-type: none"> 1. If the chartstring is the same for all line items, no changes will be made on the Distribution page. 2. If the entire chartstring is different for each line item, you would not enter the chartstring on the Requisition Defaults page, but instead must enter it on the Distribution page for each line item. 3. If only one chartfield is different for each line item, that chartfield may be left blank and all other chartfields populated on the Requisition Defaults page. You must then go to the Distribution page for each line item and enter the missing chartfield information. 4. If multiple chartstrings will be charged for a specific line item, you can add a line on the Distribution page and enter the second set of chartstring values.
104.	<p>Distribute By</p> <p>The Distribute By field indicates whether cost is being allocated by Quantity or Amount. Most blanket purchase orders are distributed by amount, especially those covering services.</p> <p>The Distribute By defaults based on the information entered on the Requisition Defaults page. The Distribute By can be changed on the Distribution page for a specific line item as needed.</p> <p><i>Contact your Buyer for additional information regarding distributing funds by Quantity or Amount.</i></p>
105.	<p>Scenario</p> <p>In this example you will:</p> <ol style="list-style-type: none"> 1. Change the Distribute By from Quantity to Amount; 2. Insert a row so a second chartstring can be entered; 3. Charge forty percent (40%) of the cost of the binders to department 2036380; and 3. Charge sixty percent (60%) of the cost of the binders to department 2036345.



Step	Action
106.	<p>Click the button to the right of the Distribute By field.</p> <p><i>NOTE: The Quantity field displays between the Percent and Merchandise Amount fields when the Distribute By is Quantity.</i></p> 
107.	<p>Click the Amount list item.</p> <p><i>Notice the Quantity field between Percent and Amount.</i></p> 
108.	<p>When the Distribute By is changed to Amount, the Quantity field is removed from the page.</p>
109.	<p>Click the Add multiple new rows at row 1 button.</p> 




Step	Action
110.	<p>A prompt box displays. The system defaults the number of rows to add to 1, but you can change that number if needed. However, the system will not allow you to save blank rows, so only add the number of rows needed.</p> <p>Click the OK button.</p> 
111.	<p>When a row is added the original chartstring values will be deduplicated on the new row. At least one chartfield (Account, Dept, and Location) must be changed on the new row.</p>

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Maintain Requisitions


Distribution

















Requisition ID: NEXT Item: D-RING BINDERS, 5" RINGS, BLUE
Line: 1 Status: Active
Schedule: 1

Ship To: BRFHS BRFHS Quantity: 10.0000 EA
Distribute By: Amount Open Amount: 159.900
Merchandise Amt: 159.90 USD



SpeedChart: [Multi-SpeedCharts](#)


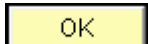
Distributions

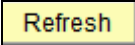

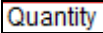

Chartfields | Details | Asset Information | Budget Information | 

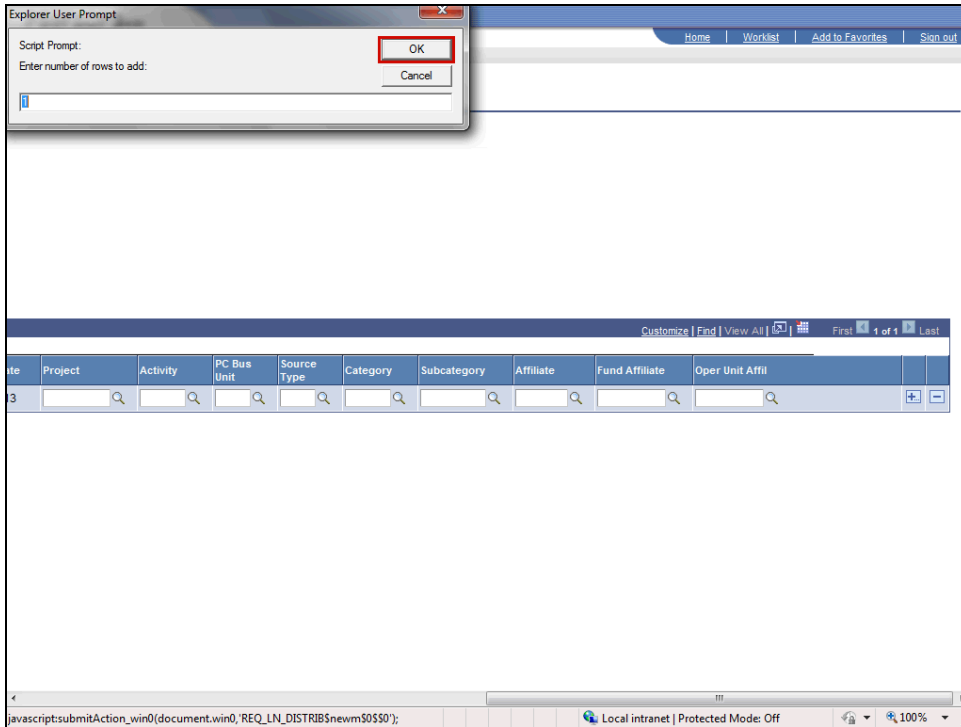
Distrib	Percent	Merchandise Amount	GL Unit	Account	Dept	Location	IN Unit	Fund	Program	Class	Budget Date	Projec
1 Open	100.0000	159.90	BRFH: 	546700 	2036380 	N20G0100 					09/17/2013	
2 Open		0.00	BRFH: 	546700 	2036380 	N20G0100 					09/17/2013	

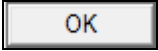
OK Cancel Refresh

Local intranet | Protected Mode: Off   100%

Step	Action
112.	<p>NOTE: Delete the value in the Percent field for Line 1 before entering the new percentage to prevent keying errors.</p> <p>Enter the desired information into the Percent field. Enter "40".</p>
113.	<p>Enter the desired information into the Percent field. Enter "60".</p> <p>NOTE: The system will automatically populate the decimal point and trailing zeroes when you navigate away from the field.</p>
114.	<p>The system automatically recalculates the Merchandise Amount based on the new percentage values.</p>
115.	<p>NOTE: Delete the value in the Dept field for line 2 before entering the new value to prevent keying errors.</p> <p>Enter the desired information into the Dept field. Enter "2036345".</p>
116.	<p>Once you have completed entering chartstring information, you would click the OK button to return to the Schedule page.</p> <p>For training purposes only, click the Delete row 2 button.</p> 
117.	<p>A message box will display confirming you want to delete the row.</p> <p>Click the OK button.</p> 

Step	Action
118.	<p>NOTE: Delete the value in the Percent field for Line 1 before entering the new percentage to prevent keying errors.</p> <p>Enter the desired information into the Percent field. Enter "100".</p>
119.	<p>Click the Refresh button.</p> 
120.	<p>Distributing funds by Quantity will now be demonstrated.</p> <p>Scenario</p> <p>In this example you will:</p> <ol style="list-style-type: none"> 1. Change the Percent value for line 1 to 100; 2. Change the Distribute By to Quantity; 3. Add a new row to the page; 4. Charge three (3) binders to department 1053000; and 5. Charge two (2) binders to department 1050100.
121.	<p>Click the button to the right of the Distribute By field.</p> 
122.	<p>Click the Quantity list item.</p> 
123.	<p>NOTE: The Quantity field displays again on the page.</p>
124.	<p>Enter the desired information into the Quantity field. Enter "4".</p>
125.	<p>Click the Add multiple new rows at row 1 button.</p> 



Step	Action
126.	Click the OK button. 
127.	The system automatically displays a Quantity of 6 in the new row. When a row is added the original chartstring values will be duplicated on the new row. At least one chartfield (Account, Dept, and Location) must be changed on the new row.

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Maintain Requisitions

Distribution

Requisition ID: NEXT Item: D-RING BINDERS, 5" RINGS, BLUE
 Line: 1 Status: Active
 Schedule: 1



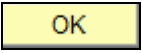
Ship To: BRFHS BRFHS Quantity: 10.0000 EA
 *Distribute By: Quantity Open Quantity: 10.0000
 Merchandise Amt: 159.90 USD

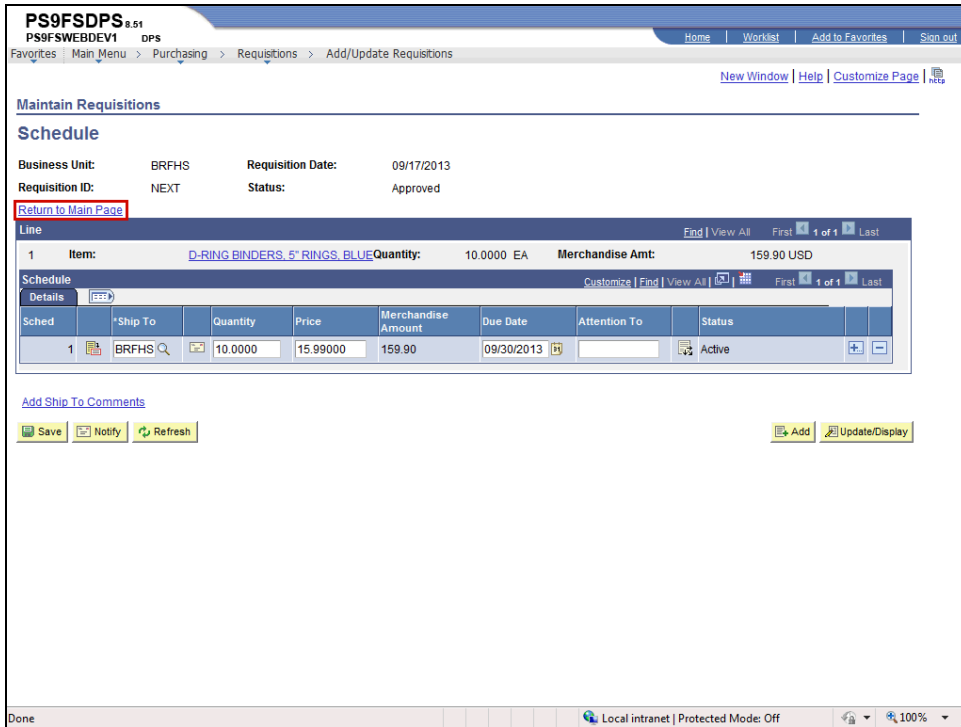
SpeedChart: [Multi-SpeedCharts](#)

Distributions												
Chartfields												
Distrib	Percent	Quantity	Merchandise Amount	GL Unit	Account	Dept	Location	IN Unit	Fund	Program	Class	Budget Date
1 Open	40.0000	4.0000	63.96	BRFH:Q	546700Q	2036380Q	N20G0100Q					09/17/2013
2 Open	60.0000	6.0000	95.94	BRFH:Q	546700Q	2036380Q	N20G0100Q					09/17/2013

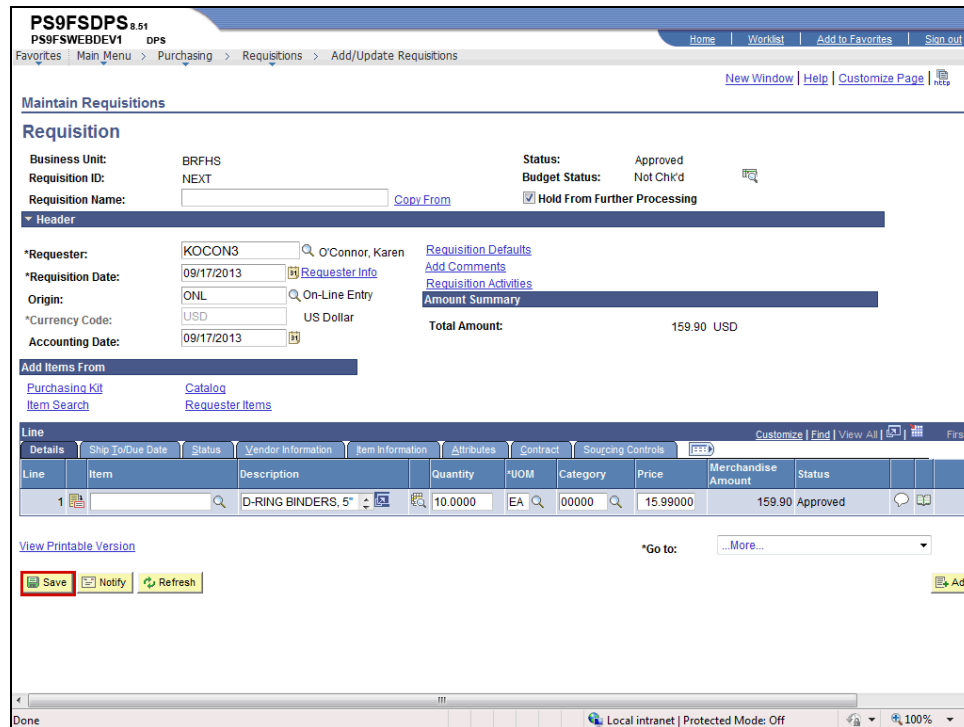
OK Cancel Refresh

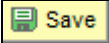
Local intranet | Protected Mode: Off 100%


Step	Action
128.	Enter the desired information into the Dept field. Enter " 2036345 ".
129.	Once you have completed entering chartstring information, you would click the OK button to return to the Schedule page. For training purposes only, click the Delete row 2 button. 
130.	Click the OK button. 
131.	The Percent and Quantity must be restored to the original values once row 2 is deleted. <i>NOTE: Delete the value in the Quantity field for Line 1 completely before entering the new quantity to prevent keying errors.</i> Enter the desired information into the Quantity field. Enter " 10 ".
132.	Click the OK button. 

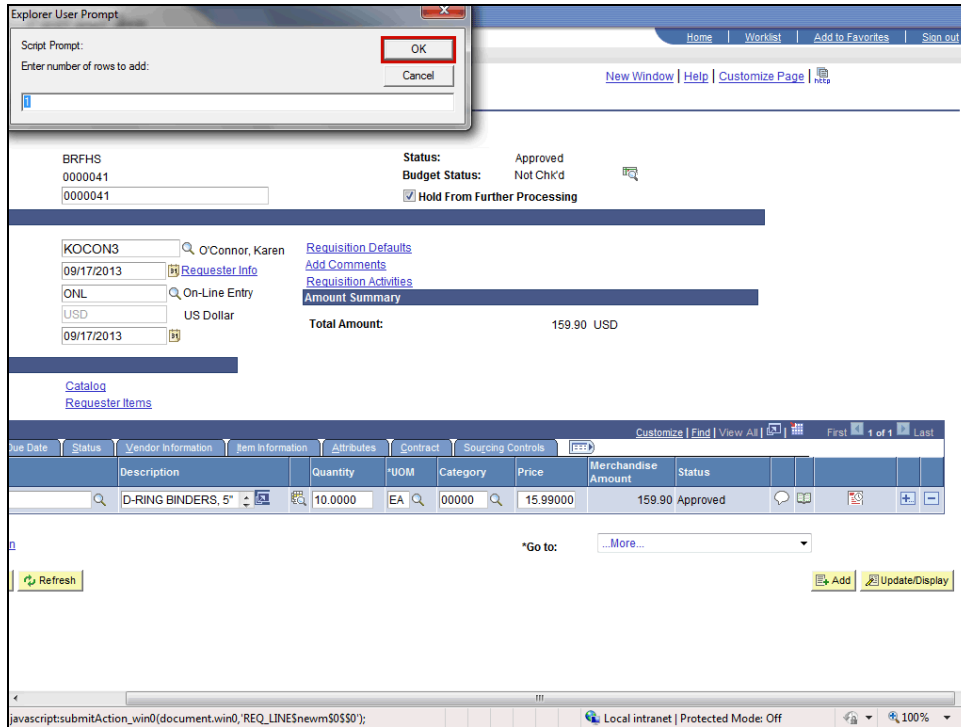


Step	Action
133.	Click the Return to Main Page link. Return to Main Page
134.	<i>It is recommended that you Save the requisition after completing each row.</i> NOTE: <i>If a multiple line item requisition is created, and a red box or save edit message is received, the line item containing the blank field(s) will not be identified. For multiple line item requisitions, it is strongly recommended the user save after the completion of each line item.</i>

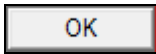


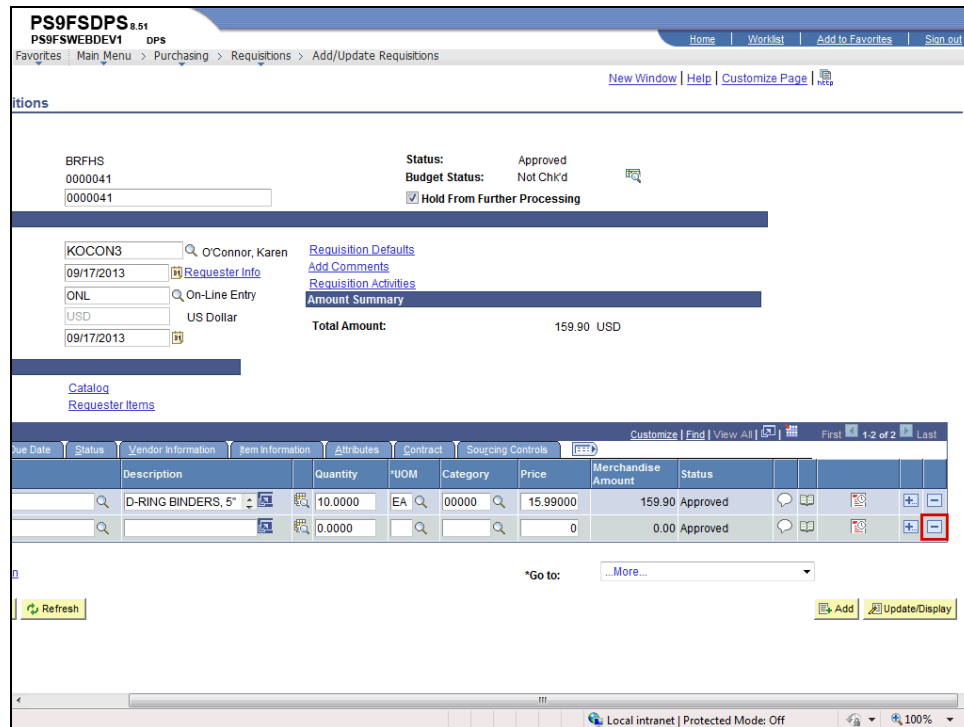
Step	Action																
135.	Click the Save button. 																
136.	The system assigns a Requisition ID number to the requisition when it is first saved. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned by Purchasing when the PO is generated. <u>BRFHS</u> When a Confirmation PO Number is entered, this will be both the Requisition ID and PO number. A separate PO number will <u>not</u> be assigned.																
137.	The following is the <u>minimal</u> data required to save a requisition and generate a Requisition ID number. If any of these fields are left blank, you will receive either a red box or a save edit error message. You <u>cannot</u> successfully save the requisition until all required fields are populated. <table data-bbox="440 1543 974 1806"> <tr> <td>1. Requester</td> <td>9. Department</td> </tr> <tr> <td>2. Requisition Date</td> <td>10. Location</td> </tr> <tr> <td>3. Accounting Date</td> <td>11. Description</td> </tr> <tr> <td>4. Buyer</td> <td>12. Quantity</td> </tr> <tr> <td>5. Vendor Number</td> <td>13. Unit of Measure</td> </tr> <tr> <td>6. Ship To</td> <td>14. Category</td> </tr> <tr> <td>7. Due Date</td> <td>15. Price</td> </tr> <tr> <td>8. Account</td> <td></td> </tr> </table>	1. Requester	9. Department	2. Requisition Date	10. Location	3. Accounting Date	11. Description	4. Buyer	12. Quantity	5. Vendor Number	13. Unit of Measure	6. Ship To	14. Category	7. Due Date	15. Price	8. Account	
1. Requester	9. Department																
2. Requisition Date	10. Location																
3. Accounting Date	11. Description																
4. Buyer	12. Quantity																
5. Vendor Number	13. Unit of Measure																
6. Ship To	14. Category																
7. Due Date	15. Price																
8. Account																	

Step	Action
138.	<p>Multiple items may be entered on the requisition; however, all items must be ordered from the same vendor. A requisition cannot have multiple vendors.</p> <p>Click the Add multiple new rows at row 1 button.</p> 



The screenshot shows a web application interface for requisition management. An 'Explorer User Prompt' dialog box is open, asking for the number of rows to add. The 'OK' button is highlighted in red. The background interface includes a header with navigation links, a form with fields for 'BRFHS', 'Status', 'Budget Status', and 'Hold From Further Processing'. Below the form is a table with columns: 'Due Date', 'Status', 'Vendor Information', 'Item Information', 'Attributes', 'Contract', 'Sourcing Controls', 'Description', 'Quantity', 'UOM', 'Category', 'Price', 'Merchandise Amount', and 'Status'. The table contains one row with the following data: 'D-RING BINDERS, 5"', '10.0000', 'EA', '00000', '15.99000', '159.90', and 'Approved'. There are also buttons for 'Refresh', 'Add', and 'Update/Display'.

Step	Action
139.	<p>Click the OK button.</p> 



PS9FSDPS 8.51
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

New Window | Help | Customize Page | Help

Requisitions

BRFHS
0000041
0000041

Status: Approved
Budget Status: Not Chk'd
 Hold From Further Processing

KOCON3 O'Connor, Karen
09/17/2013
ONL On-Line Entry
USD US Dollar
09/17/2013

Requisition Defaults
Add Comments
Requisition Activities
Amount Summary

Total Amount: 159.90 USD




Catalog
Requester Items

Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	Merchandise Amount	Status
			D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90 Approved
				0.0000			0	0.00 Approved

*Go to: ..More...

Refresh Add Update/Display

Local intranet | Protected Mode: Off

Step	Action
140.	<p>You would enter information to Line 2 in the same manner as demonstrated in Line 1. For training purposes only, a new line item will not be added.</p> <p>Click the Delete row 2 button.</p> 
141.	<p>Click the OK button.</p> 
142.	<p>You must save the requisition each time a change is made.</p> <p>Click the Save button.</p> 
143.	<p>NOTE: If the requisition is not complete, <u>do not uncheck</u> the Hold From Further Processing checkbox so that you may continue working on the requisition.</p> <p>For training purposes only, the Hold From Further Processing box will remain checked at this time.</p>
144.	<p>When the requisition is complete, you must uncheck the Hold From Further Processing checkbox.</p> <p>NOTE: You cannot add information to the requisition once the Hold From Further Processing checkbox is unchecked and the requisition is saved.</p>

Step	Action
145.	This completes <i>Enter a Requisition</i> . End of Procedure.

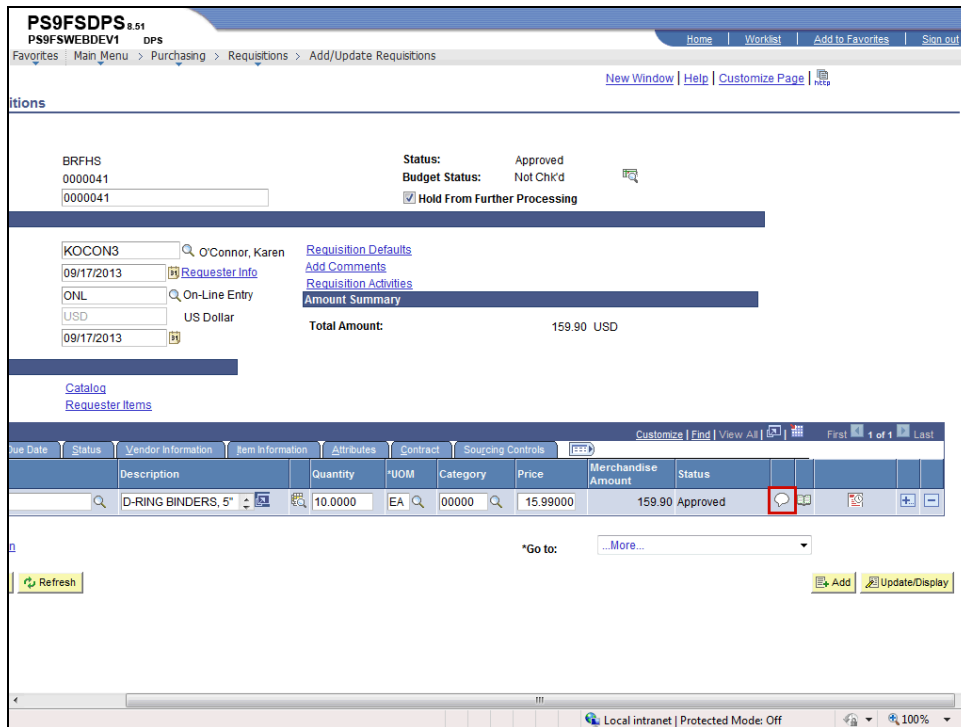
Add, Change, or Delete Comments


Procedure

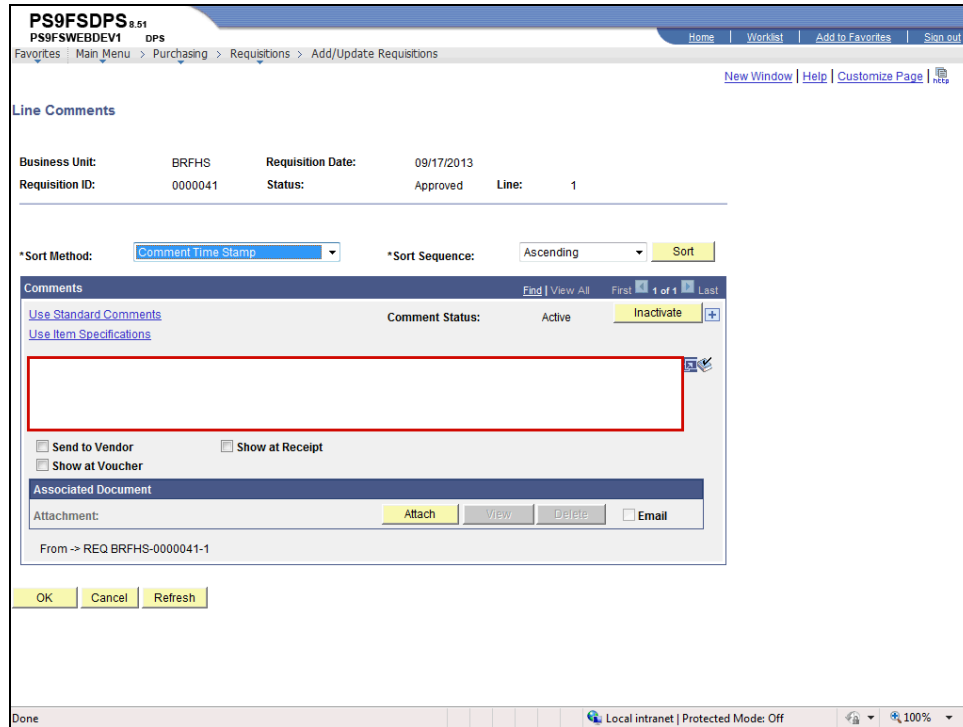
In this topic you will learn how to **Add, Change, or Delete Comments** at the Header and Line level.


NOTE: Comments will be added while entering the Requisitions.

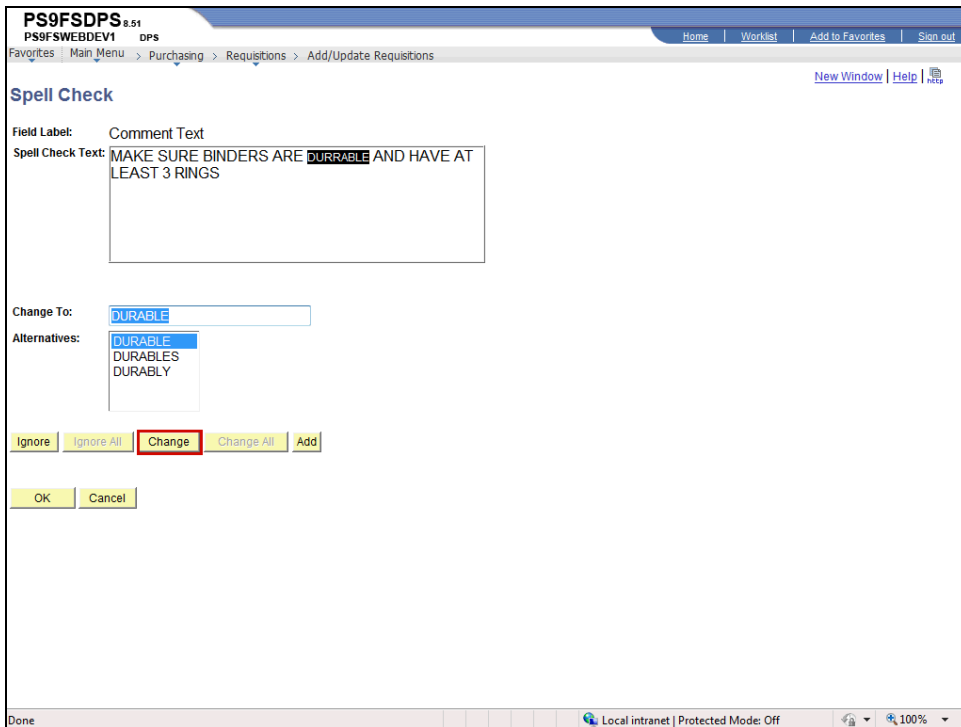
Step	Action
1.	<p>Header</p> <p>Comments may be added to a requisition at the Header level using the Add Comments link. Users should only enter information that applies to the entire requisition (e.g. new vendor information, suggested vendors for bid, address for mailing the Purchase Order when the vendor has multiple locations, etc.) at the Header level. Specific shipping or delivery instructions applicable to all line items may also be entered at the Header level.</p>
2.	<p>Header (continued)</p> <p>Justification for purchase can be added as header comments. Comments added at the Header level will display and print after all line item information.</p>
3.	<p>Line Comments</p> <p>Comments may also be added for a specific line item in the Line Comments page. Comments added in Line Comments will display and print with the corresponding line item. Only information that applies to that particular line item (i.e. item specifications) should be entered in its Line Comments page.</p> <p>Do not enter vendor information or the address for mailing a PO in the Line Comments page. That information must be entered at the Header level.</p>
4.	<p>The end-user may opt to add specific shipping or delivery instructions in the Add Ship To Comments link on the Schedule page of a line item. If comments are added in the Add Ship To Comments, they will display and print with the corresponding line directly above the Line Comments for the line.</p>

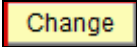
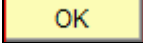


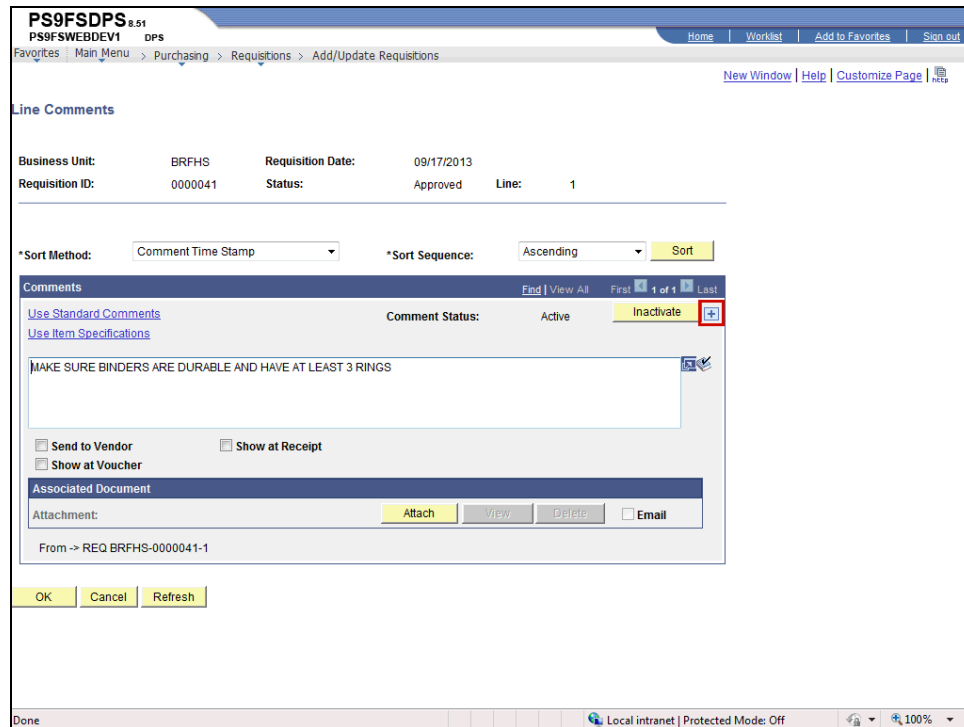
Step	Action
5.	<p>In this exercise you will add comments at the Line level.</p> <p><i>NOTE: The instructions shown here may be used to enter comments at the Line and Header level. The method used to add, change and delete comments is the same for both.</i></p> <p>Click the Line Comments button.</p> 
6.	<p>You may enter free-text comments by typing in the Comments field. You may use the Enter key on your computer keyboard in the comment box to move to the next line.</p> <p>Comment boxes have no limits set for the number of characters entered. It is recommended that users limit comments in each box to half a page. New comments boxes can be added if more space is required. There is no limit on the number of comment boxes that can be added. If you need to enter lengthy comments (e.g. specifications) you may opt to send those electronically, or deliver a hard copy to Purchasing with a notation of the Requisition ID to which it should be attached. Documents can also be attached to the comment box as well.</p> <p>Users may copy and paste comments from the web and Microsoft applications such as Word. The spell check feature is also available for each comment box.</p>



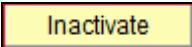


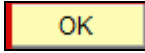
Step	Action
7.	<p><i>NOTE: Comments will display and print on the requisition, so do not include any comments you do wish to be seen in Line Comments.</i></p> <p>Enter the desired information into the Comment Status field. Enter "MAKE SURE BINDERS ARE DURRABLE AND HAVE AT LEAST 3 RINGS".</p>
8.	<p>Click the Spell Check Comment Text button.</p> 

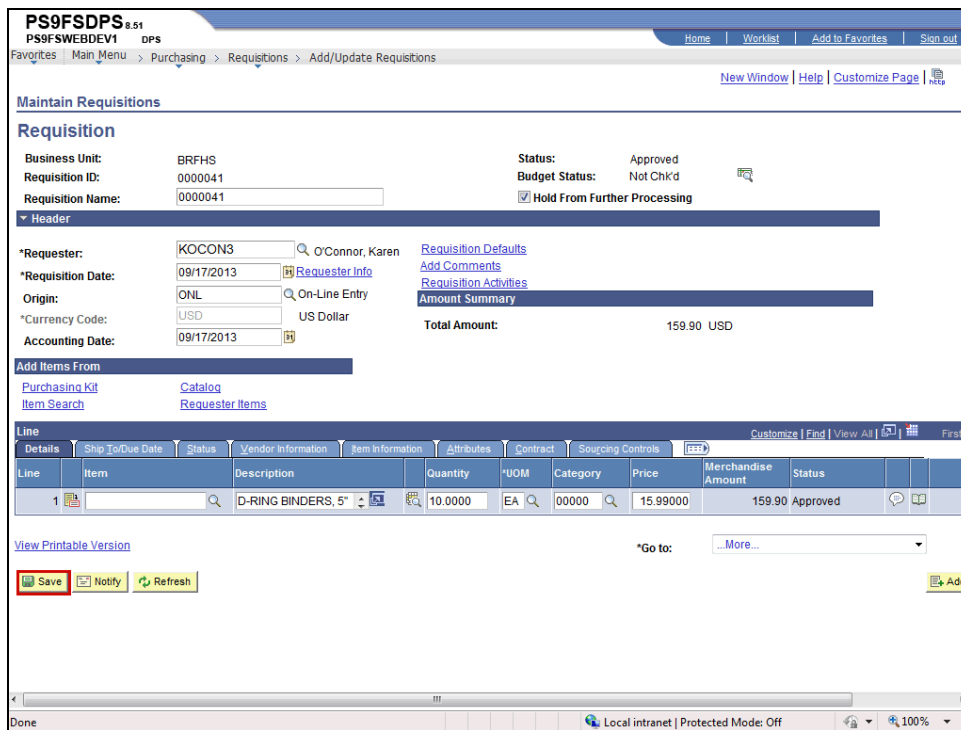


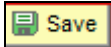

Step	Action
9.	<p>Misspelled words are highlighted and alternative spellings are provided.</p> <p>Click the Change button.</p> <p><i>NOTE: Be very careful when using this feature.</i></p> 
10.	<p>Click the OK button.</p> 
11.	<p>Send to Vendor</p> <p>If the Send to Vendor checkbox is checked, any comments shown will be printed on the PO. Purchasing will check this box if needed.</p>

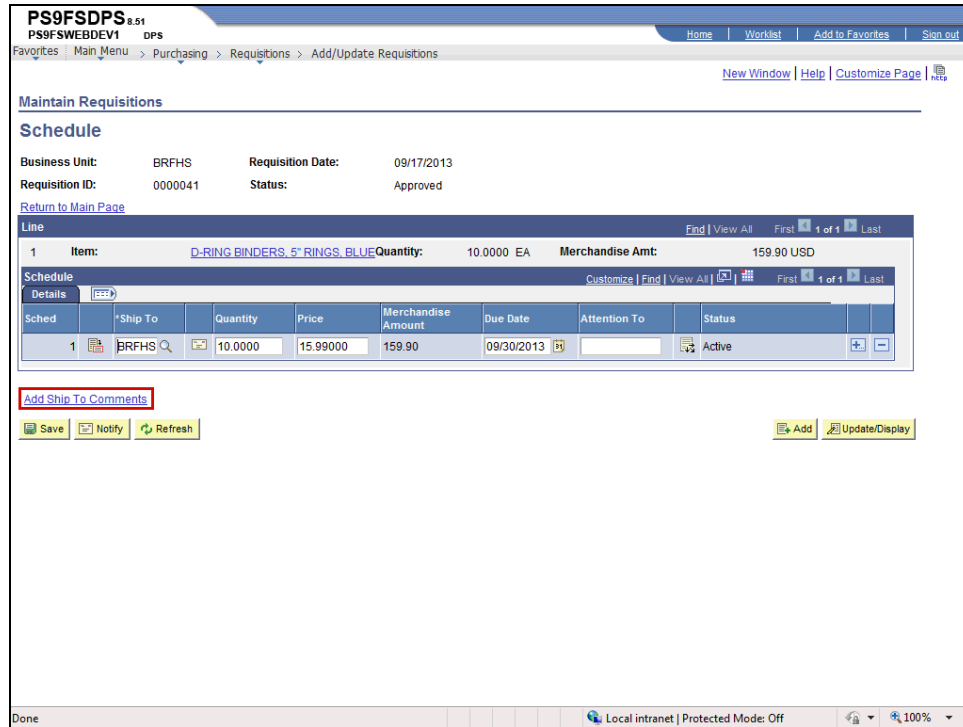


Step	Action
12.	Click the Add a new row at row 1 button to insert a row if additional space is needed. 
13.	You may continue to insert comment boxes as needed. Inserted row(s) are independent of each other and have unlimited characters. Comments will display below line item information on the requisition. Click the View All link. 
14.	The Use Standard Comments and Use Item Specifications links should not be used.
15.	Inactivate Comments Comments cannot be deleted, but can be inactivated so that they will not show in the system or on the requisition. The comment box will be greyed out by the system when the Inactivate button is clicked. <i>NOTE: When a user navigates away from the Line Comments page, the system will remove the inactivated comment boxes from the page. Inactivated comment boxes cannot be recovered once a user navigates away from the page; they must be re-entered.</i> Click the Inactivate button. 

Step	Action
16.	Clicking the Undo button will re-activate an inactivated comment box as long as you have not navigated away from the Line Comments page. Inactivated comment boxes cannot be re-activated once you navigate away from the page.
17.	Click the OK button to return to the Requisition page. 
18.	<i>NOTE: The white Comment bubble now is now filled with blue dots, indicating comments have been added.</i>

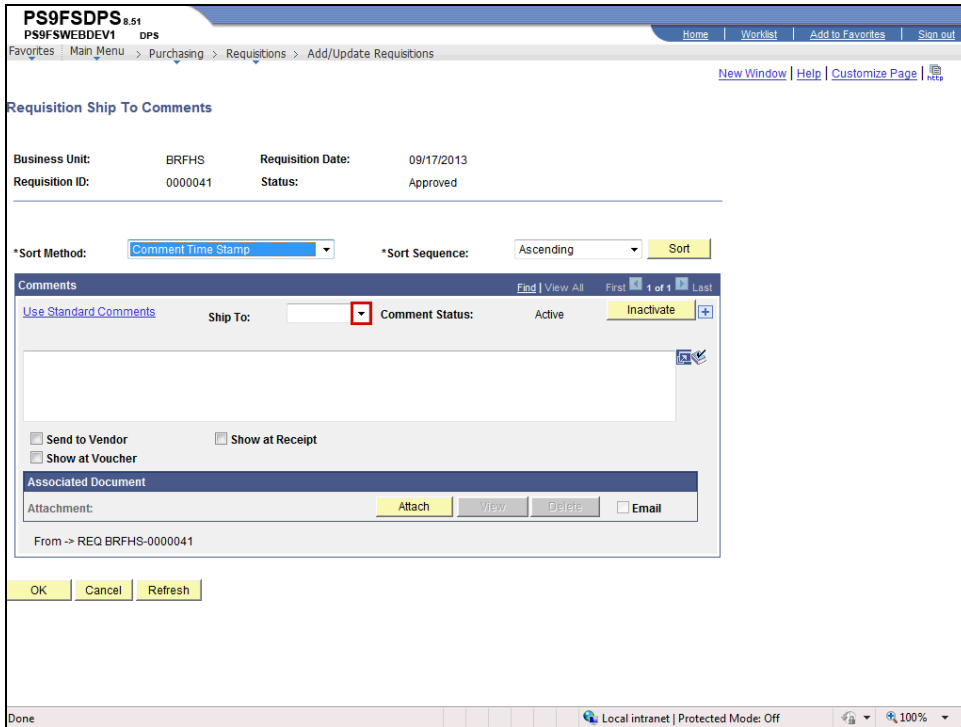



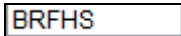
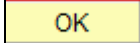
Step	Action
19.	Click the Save button. <i>NOTE: Users should save whenever a change is made to the requisition.</i> 
20.	Add Ship To Comments Users can add special shipping or delivery instructions for a specific line item using the Add Ship To Comments link on the specified line's Schedule page. Click the Schedule... button. 

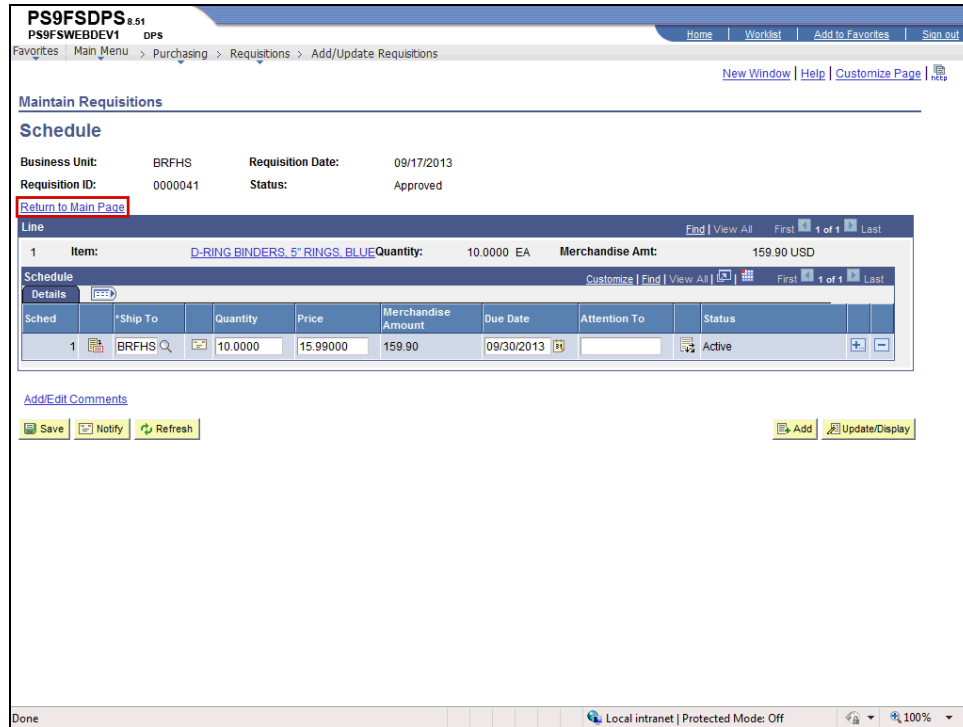


The screenshot shows a web application interface for 'PS9FSDPS 8.51'. The page title is 'Maintain Requisitions' and the sub-section is 'Schedule'. The requisition details are: Business Unit: BRFHS, Requisition Date: 09/17/2013, Requisition ID: 0000041, Status: Approved. A table shows a single line item: 'D-RING BINDERS, 5" RINGS, BLUE' with a quantity of 10,000 EA and a merchandise amount of 159.90 USD. Below the table, the 'Add Ship To Comments' link is highlighted with a red box. Other visible links include 'Return to Main Page', 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

Step	Action
21.	Click the Add Ship To Comments link. Add Ship To Comments
22.	When adding a comment on the Add Ship To page, you must select a Ship To Location from the drop-down list.
23.	If you add a comment and do not select a Ship To Location, you will receive the warning message below when you try to navigate away from the page. You can either go back and select the Ship To location or delete the comment.



Step	Action
24.	Click the Ship To list. 
25.	Click the BRFHS list item. 
26.	Enter the desired information into the Ship To field. Enter " PLEASE DELIVER BINDERS TO N20G0100 DIRECTLY ".
27.	Click the OK button. 



PS9FSDPS 8.51
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

[New Window](#) | [Help](#) | [Customize Page](#) |

Maintain Requisitions

Schedule

Business Unit: BRFHS Requisition Date: 09/17/2013
 Requisition ID: 0000041 Status: Approved

[Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	D-RING BINDERS, 5" RINGS, BLUE	10.0000 EA	15.99000	159.90 USD	09/30/2013		Active

Save | Notify | Refresh Add | Update/Display


Done Local intranet | Protected Mode: Off 100%

Step	Action
28.	Click the Return to Main Page link. Return to Main Page

PS9FSDPS 8.51
PS9FWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page | 

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved
 Requisition ID: 0000041 Budget Status: Not Chk'd
 Requisition Name: 0000041 Hold From Further Processing

▼ Header

*Requester: KOCON3 O'Connor, Karen [Requisition Defaults](#)
 *Requisition Date: 09/17/2013 [Add Comments](#)
 Origin: ONL On-Line Entry [Requisition Activities](#)
 *Currency Code: USD US Dollar [Amount Summary](#)
 Accounting Date: 09/17/2013 Total Amount: 159.90 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

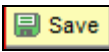
Line

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved

[View Printable Version](#) *Go to:

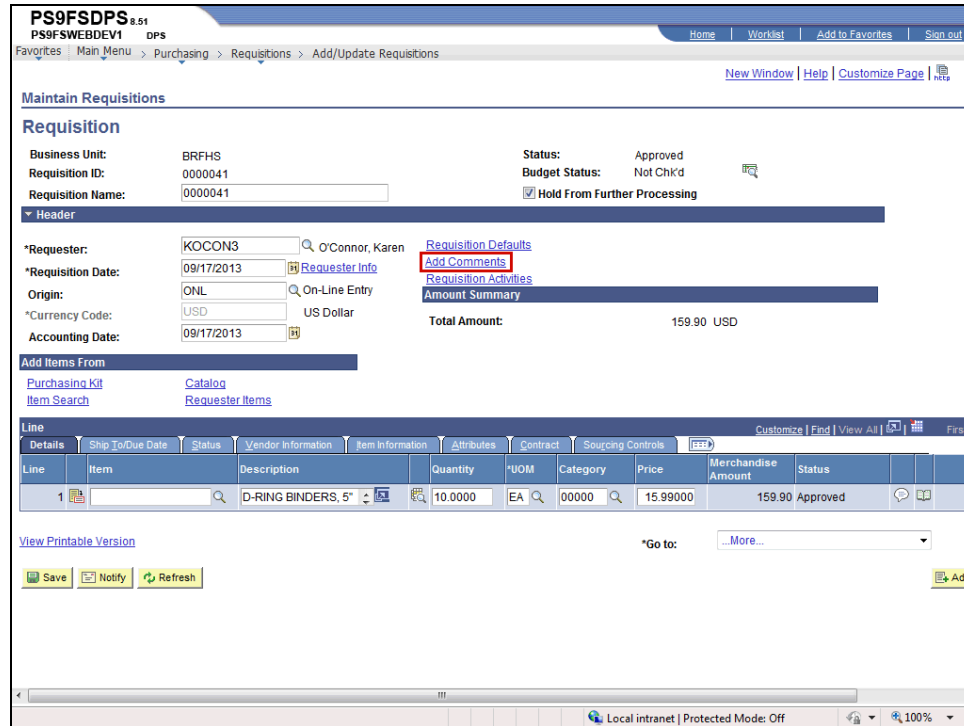
Done Local intranet | Protected Mode: Off 100%

Step	Action
29.	Click the Save button. 
30.	This completes <i>Add, Change, or Delete Comments</i> . End of Procedure.

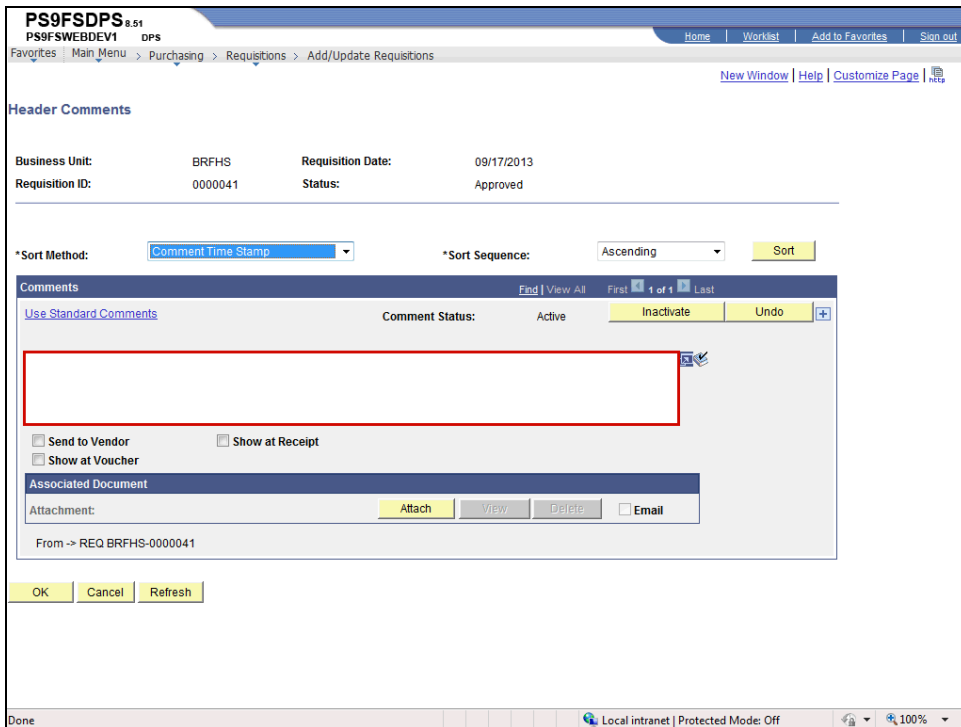
Attaching a Document to a Requisition



Procedure

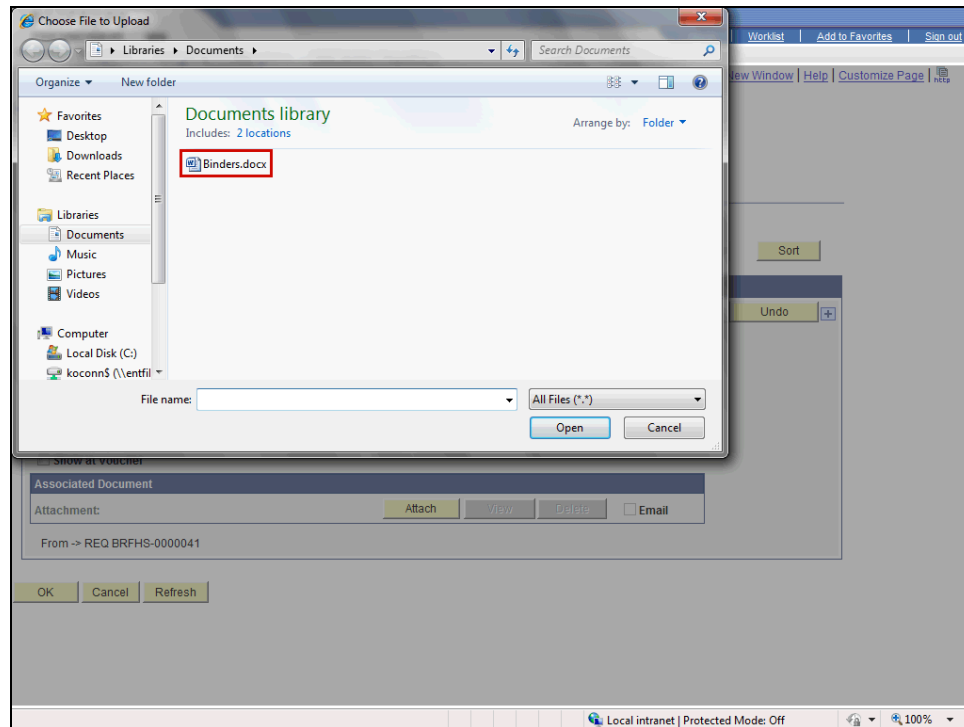
In this topic you learn how to **Attach a Document to a Requisition**.

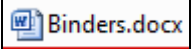



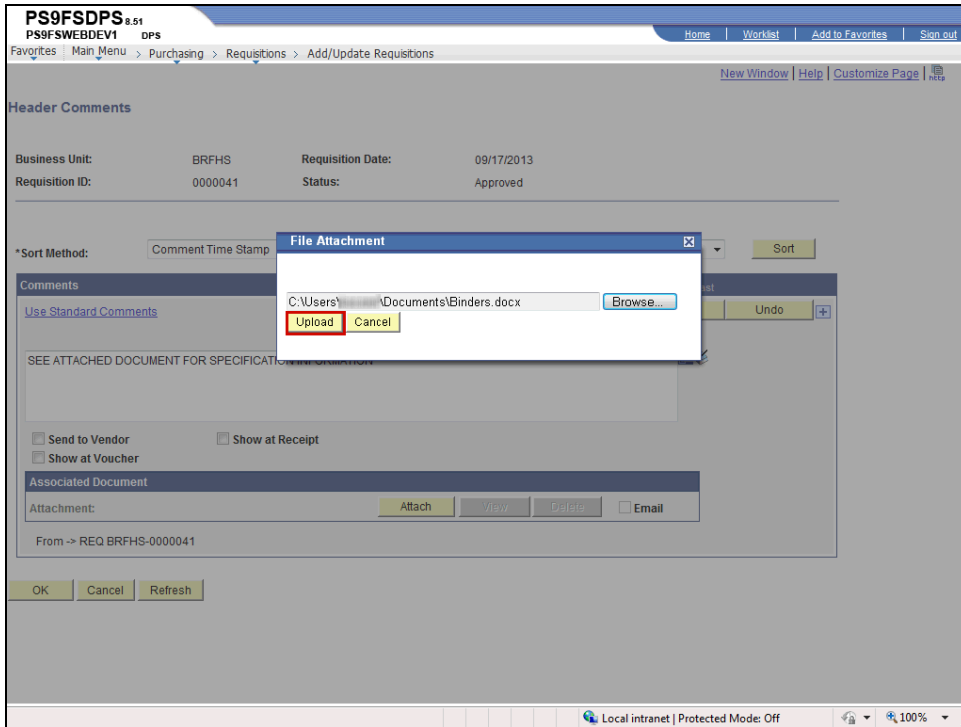
Step	Action
1.	<p>Click in the Add Comments or Edit Comments Link.</p> <p><i>NOTE: Once comments are added to the Requisition, the Add Comment Link changes to Edit Comments.</i></p> <p>In this example, comments were previously added to the Requisition. Therefore, the comments link has already changed to Edit Comments.</p> <p>Add Comments</p>


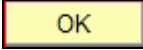


Step	Action
2.	Enter the desired information into the Comment Status field. Enter " SEE ATTACHED DOCUMENT FOR SPECIFICATION INFORMATION ".
3.	Click in the Attach Button to attach a document. <i>NOTE: The View and Delete buttons are grayed out meaning they are inactive.</i> 
4.	Enter the file name with the directory in the blank field; OR Click the Browse Button to look for the file in your directory. <i>NOTE: The following document types can be attached to the Requisition: Excel, Word, PDF, Notepad</i> If you want to attach Internet Information, you must cut and paste the information to a word document before attaching. 



Step	Action
5.	<p>Select the document you wish to attach.</p> <p>Click the Binders option.</p> 
6.	<p>Click the Open button.</p> 




Step	Action
7.	Click in the Upload Button to attach the document. 
8.	The Attach button is now inactive, and the View and Delete buttons are active. The name of the attached document is displayed to the left of the Attach button. <i>NOTE: Although PeopleSoft allows you to attach a document to a requisition, the document will not print when the Requisition is printed. You must print the attachment separately and attach it to a hard copy of the requisition.</i>
9.	Click the OK button. 

PS9FSDPS 8.51
PS9FSEBDEV1 ops

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions


New Window | Help | Customize Page | 

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved
 Requisition ID: 0000041 Budget Status: Not Chk'd
 Requisition Name: 0000041 Hold From Further Processing

▼ Header

*Requester: KOCON3  O'Connor, Karen [Requisition Defaults](#)
 *Requisition Date: 09/17/2013 [Requester Info](#) [Edit Comments](#)
 Origin: ONL [On-Line Entry](#) [Requisition Activities](#)
 *Currency Code: USD US Dollar [Amount Summary](#)
 Accounting Date: 09/17/2013 Total Amount: 159.90 USD

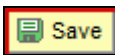
Add Items From

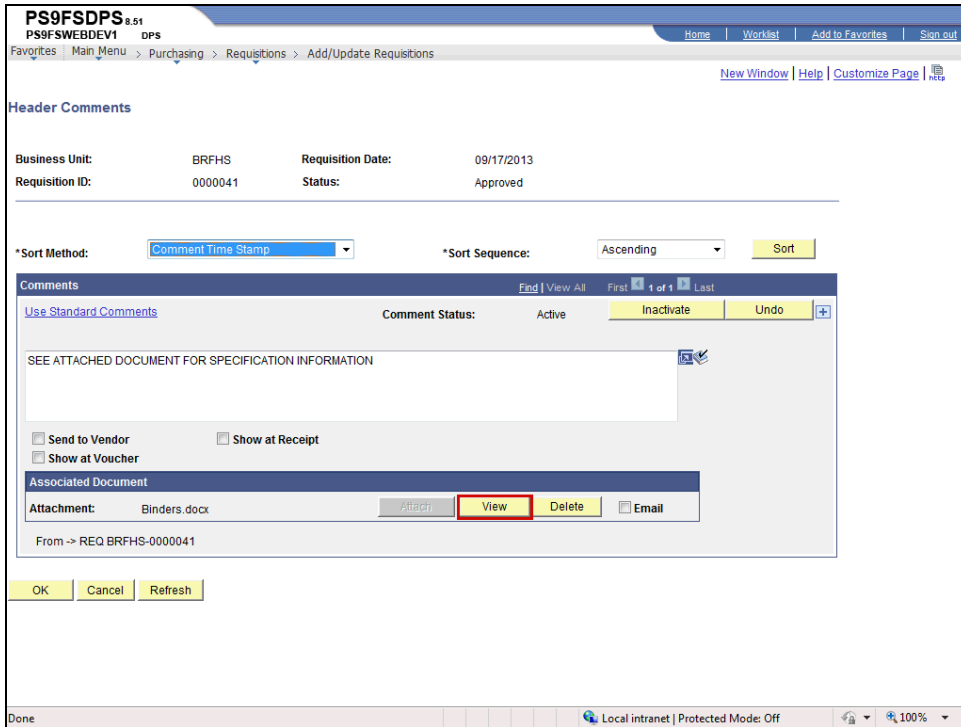
[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved

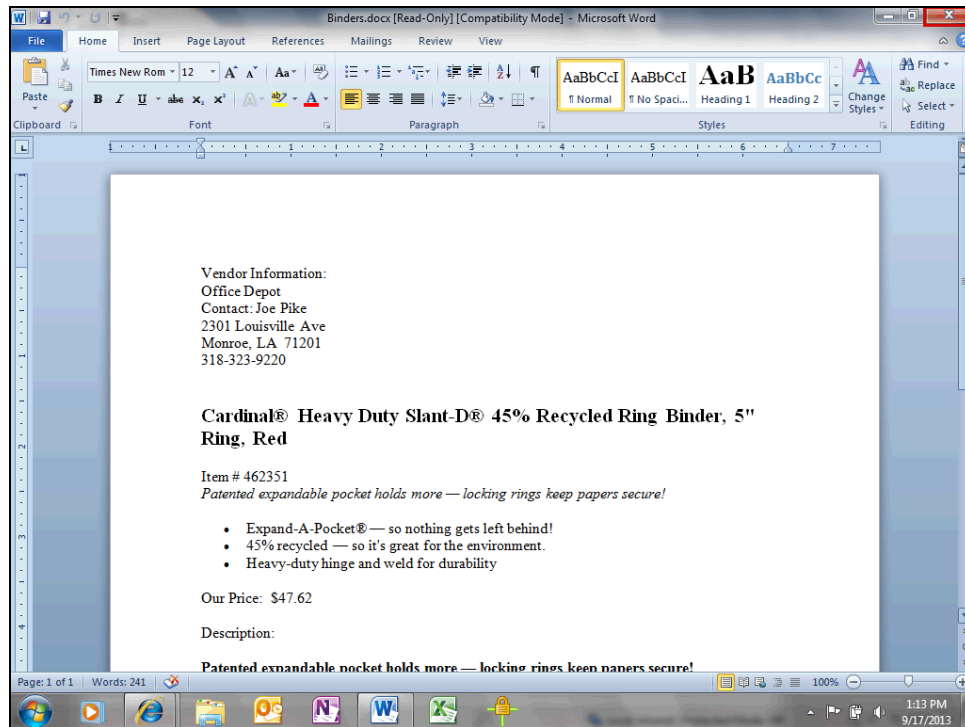
[View Printable Version](#) *Go to: [.More...](#)


Done Local intranet | Protected Mode: Off 100%

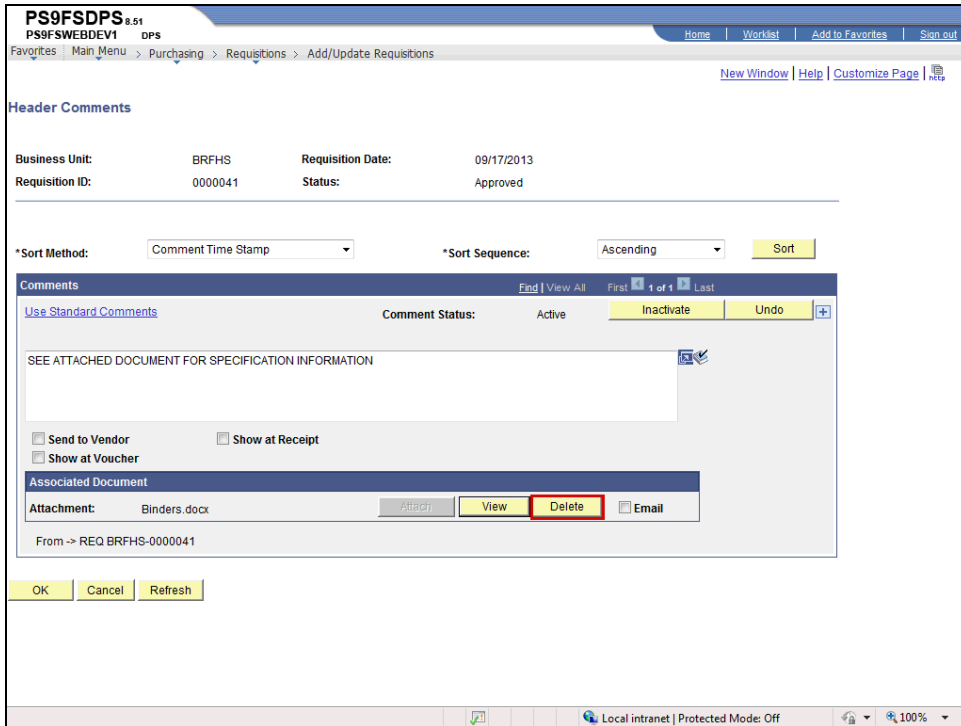
Step	Action
10.	Click the Save button to save the attached document to the requisition. 
11.	To view the attached document, click the Edit Comments Link . Edit Comments


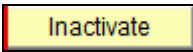
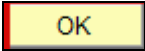


Step	Action
12.	<p>Click the View button to view the attachment. This action opens a new window and displays the attachment.</p> <p><i>NOTE: No changes can be made to the attached document within PeopleSoft. If changes to the attached document are required, you must make the changes prior to attaching it to the Requisition.</i></p> <div data-bbox="344 1234 500 1276" style="border: 1px solid black; padding: 2px; display: inline-block;">View</div>



Step	Action
13.	Click X to close the attachment. 




Step	Action
14.	Click the Delete button to delete the attached document. 
15.	Click the Inactivate button. 
16.	Click the OK button. 

PS9FSDPS 8.51
PS9FSEBDEV1 ops

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page | 

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved
 Requisition ID: 0000041 Budget Status: Not Chk'd
 Requisition Name: 0000041 Hold From Further Processing

▼ Header

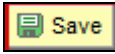
*Requester: KOCON3 O'Connor, Karen [Requisition Defaults](#)
 *Requisition Date: 09/17/2013 [Requester Info](#) [Edit Comments](#)
 Origin: ONL On-Line Entry [Requisition Activities](#)
 *Currency Code: USD US Dollar Total Amount: 159.90 USD
 Accounting Date: 09/17/2013 [Amount Summary](#)

Add Items From
[Purchasing Kit](#) [Catalog](#)
[Item Search](#) [Requester Items](#)

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved

[View Printable Version](#) *Go to: [More...](#)

Done Local intranet | Protected Mode: Off 100%

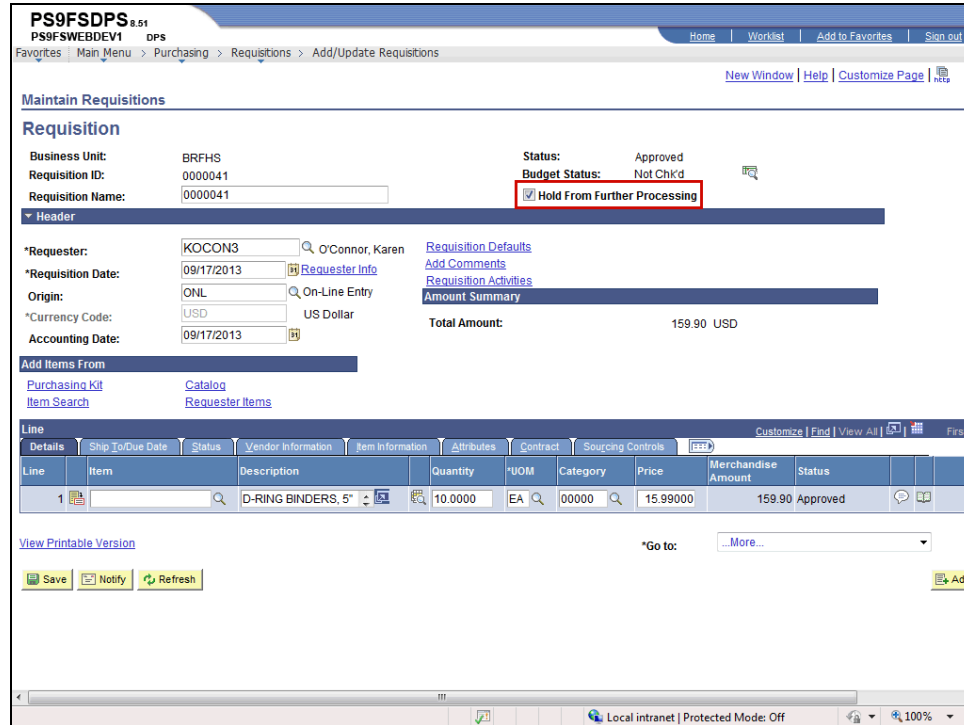
Step	Action
17.	<p>The attached document will not be removed if you do not save the requisition. The requisition must be saved to complete the delete process.</p> <p>Click the Save button.</p> 
18.	<p>Once the Document is saved, the link displays once again as Add Comments instead of Edit Comments.</p> <p>New comments can be added by clicking the Add Comments link.</p>
19.	<p>This completes <i>Attaching a Document to a Requisition</i>.</p> <p>End of Procedure.</p>

Budget Check and Print a Requisition

Procedure

In this topic you will learn how to **Print a Requisition**.

NOTE: Requisitions must be requested and printed ONE AT A TIME. Users must wait for the first requisition to print before submitting a request to print and printing another requisition.

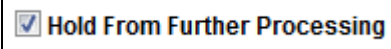
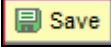


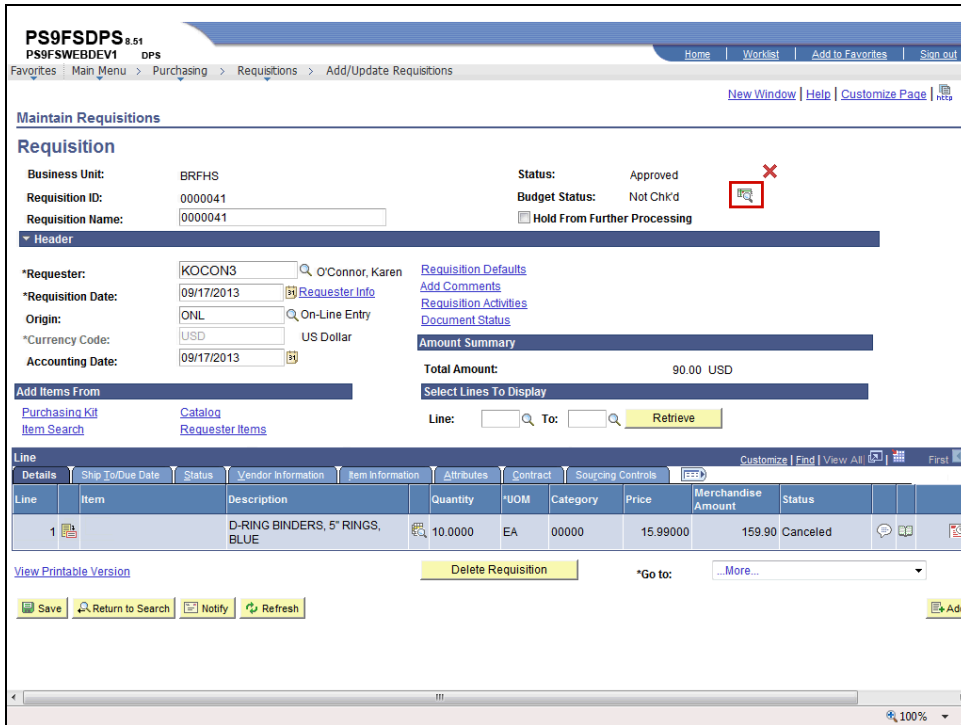
The screenshot shows the 'Maintain Requisitions' page in the PS9FSDPS 8.51 application. The requisition details are as follows:


- Business Unit: BRFHS
- Requisition ID: 0000041
- Requisition Name: 0000041
- Status: Approved
- Budget Status: Not Chk'd
- Hold From Further Processing:
- *Requester: KOCON3 O'Connor, Karen
- *Requisition Date: 09/17/2013
- Origin: ONL On-Line Entry
- *Currency Code: USD US Dollar
- Accounting Date: 09/17/2013
- Total Amount: 159.90 USD

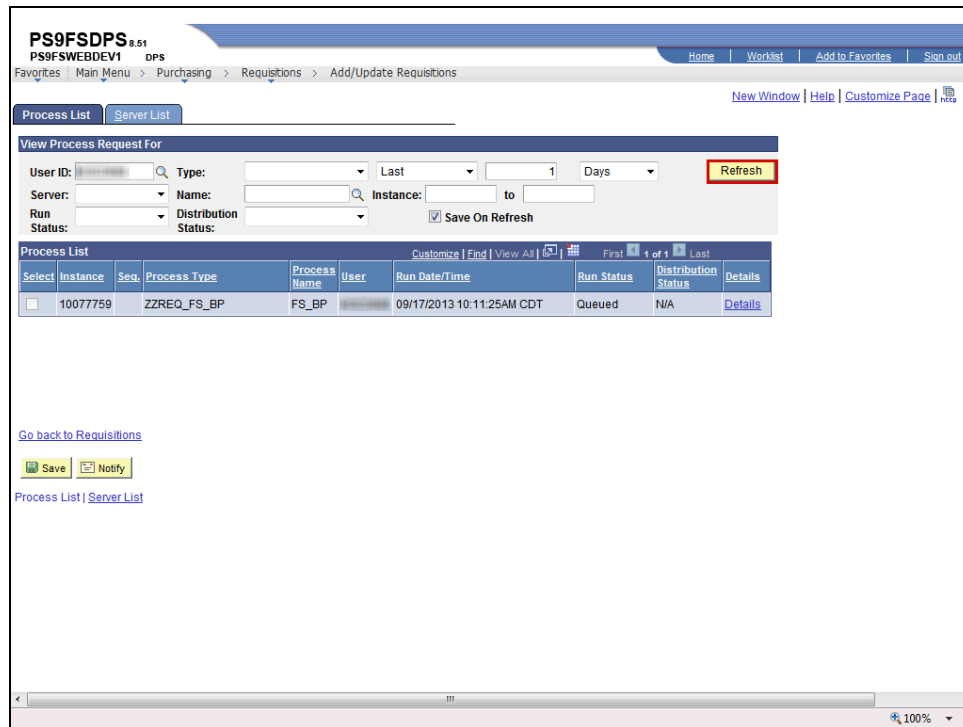
The 'Line' table below shows one item:


Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved

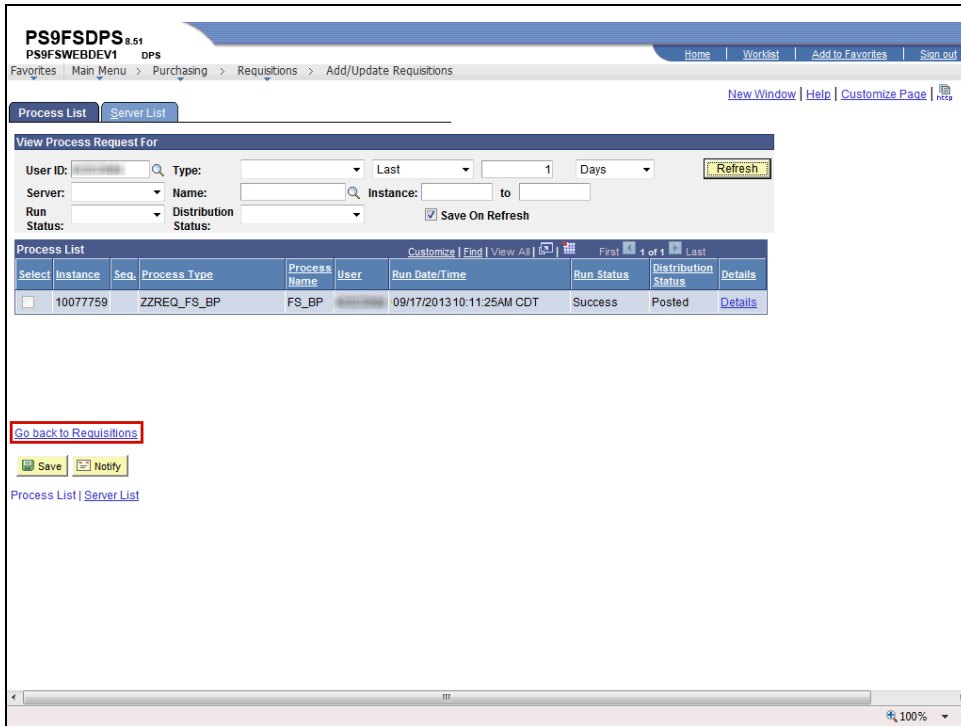
Step	Action
1.	Click the Hold From Further Processing option. 
2.	Click the Save button. <i>NOTE: The requisition must be saved in order to Budget Check.</i> 
3.	The Budget Status must be Valid in order for the requisition to be sourced as a P.O.



Step	Action
4.	<p>Click the Budget Check button.</p> <p><i>NOTE: The system will automatically send you to the Process Monitor panel.</i></p> 
5.	<p>Click the Refresh button until the Run Status = Success and the Distribution Status = Posted to complete the process.</p> <p><i>NOTE: DO NOT repeatedly click the Refresh button as this uses system resources. Please allow 15 seconds between clicks.</i></p>



Step	Action
6.	Click the Refresh button. 



Step	Action
7.	Click the Go back to Requisitions link to return to the Requisition header page. Go back to Requisitions
8.	In this example, the Budget Status is Valid, so the requisition can now be sourced to a PO.
9.	This completes Budget Check a Requisition.
10.	There are two methods available for printing a requisition: View Printable Version and Accessing the Process Monitor. Both methods will be demonstrated here. The View Printable Version method will be demonstrated first.

PS9FSDPS 8.51
PS9FSWEBDEV1 DPS


Home | Worklist | Add to Favorites | Sign out


Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

[New Window](#) | [Help](#) | [Customize Pa](#) | [Saved](#)

Maintain Requisitions


Requisition


Business Unit: BRFHS Status: Approved 


Requisition ID: 0000041 Budget Status: Not Chk'd 

Requisition Name: [0000041] Hold From Further Processing


▼ Header

*Requester: KOC0N3  O'Connor, Karen [Requisition Defaults](#)

*Requisition Date: 09/17/2013  [Requester Info](#) [Add Comments](#)

Origin: ONL  On-Line Entry [Requisition Activities](#)

*Currency Code: USD US Dollar [Amount Summary](#)

Accounting Date: 09/17/2013  Total Amount: 159.90 USD

Add Items From

[Purchasing Kit](#) [Catalog](#)

[Item Search](#) [Requester Items](#)

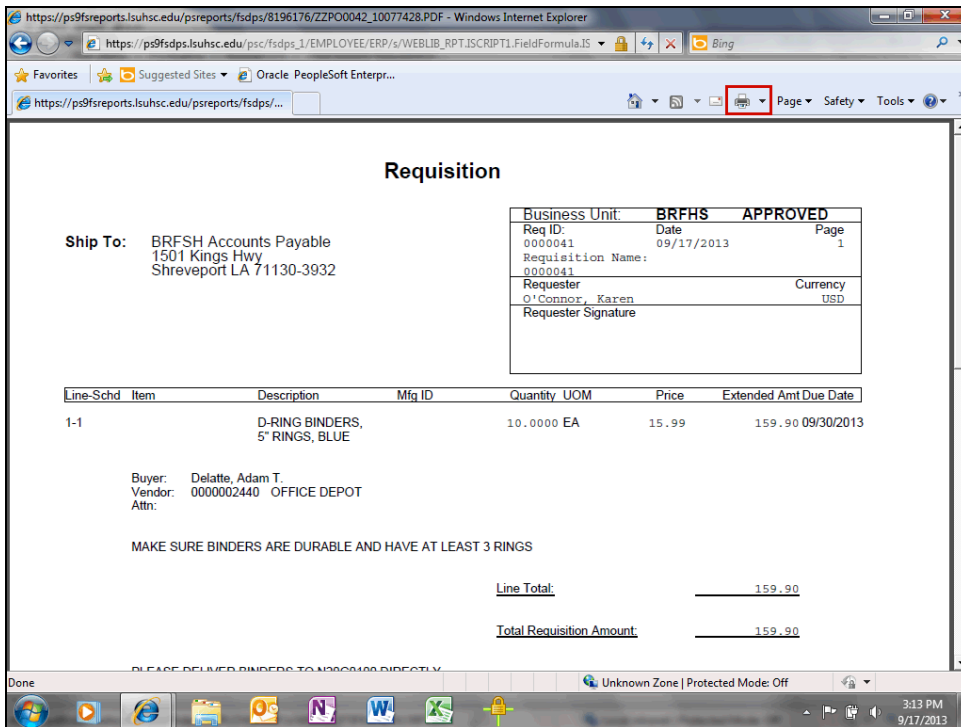
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved


[View Printable Version](#) [Delete Requisition](#) *Go to: [...More...](#)

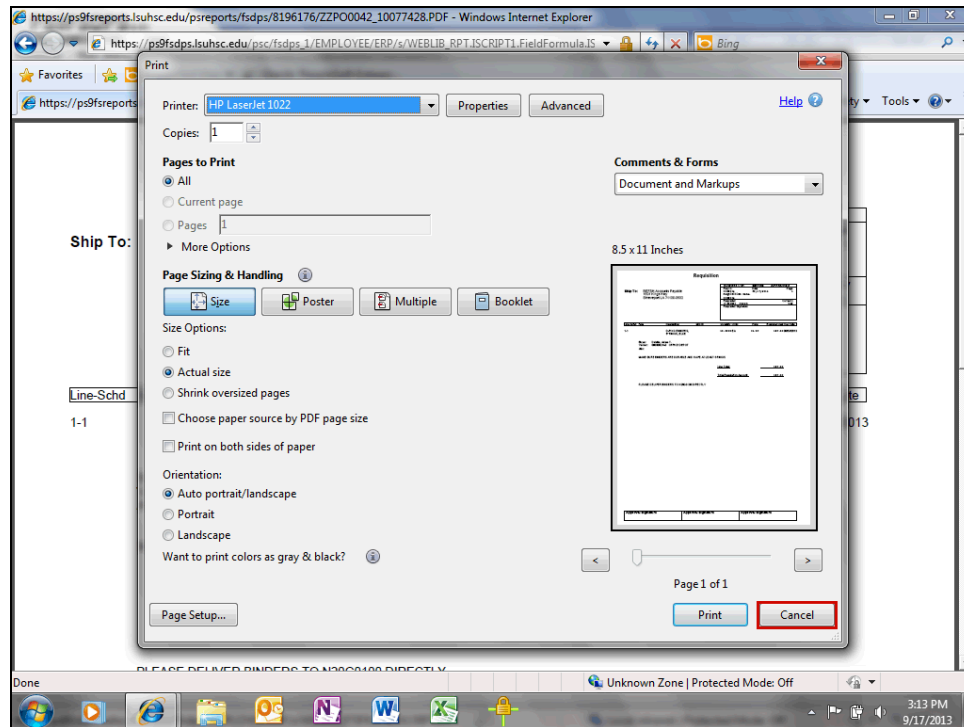
[Save](#) [Notify](#) [Refresh](#) [Add](#)

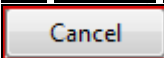
Local intranet | Protected Mode: Off

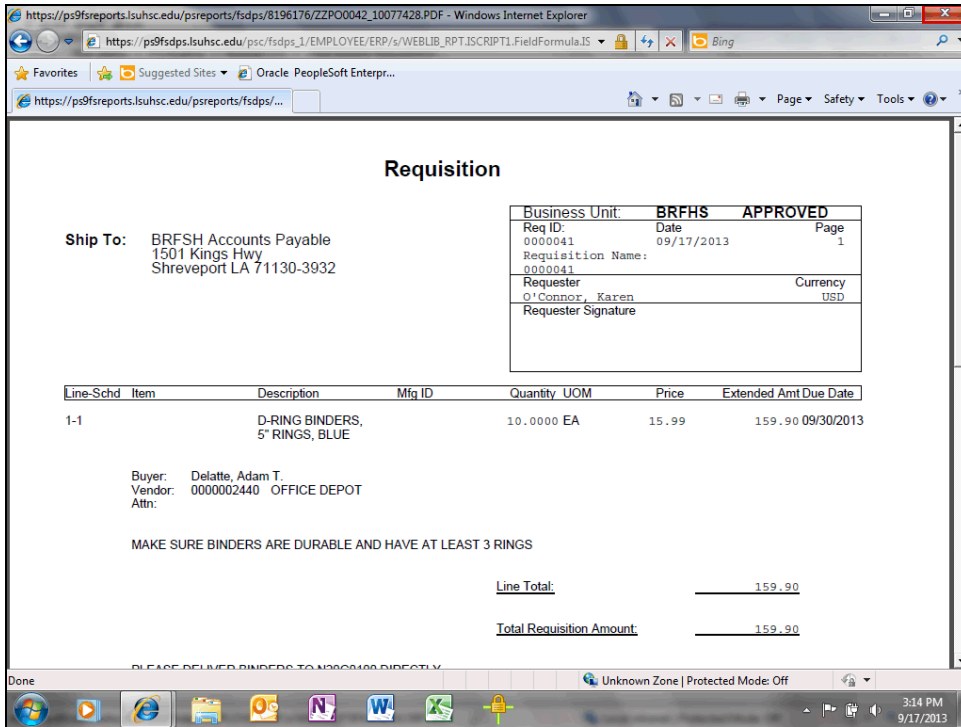
Step	Action
11.	<p>Click the View Printable Version link.</p> <p><i>NOTE: The View Printable Version button may <u>not</u> be used for printing purposes once the Requisition Status = Closed. The user <u>must print</u> the Requisition by following the steps beginning with Step 8 of this exercise once the Requisition Status = Closed.</i></p> <p>View Printable Version</p>




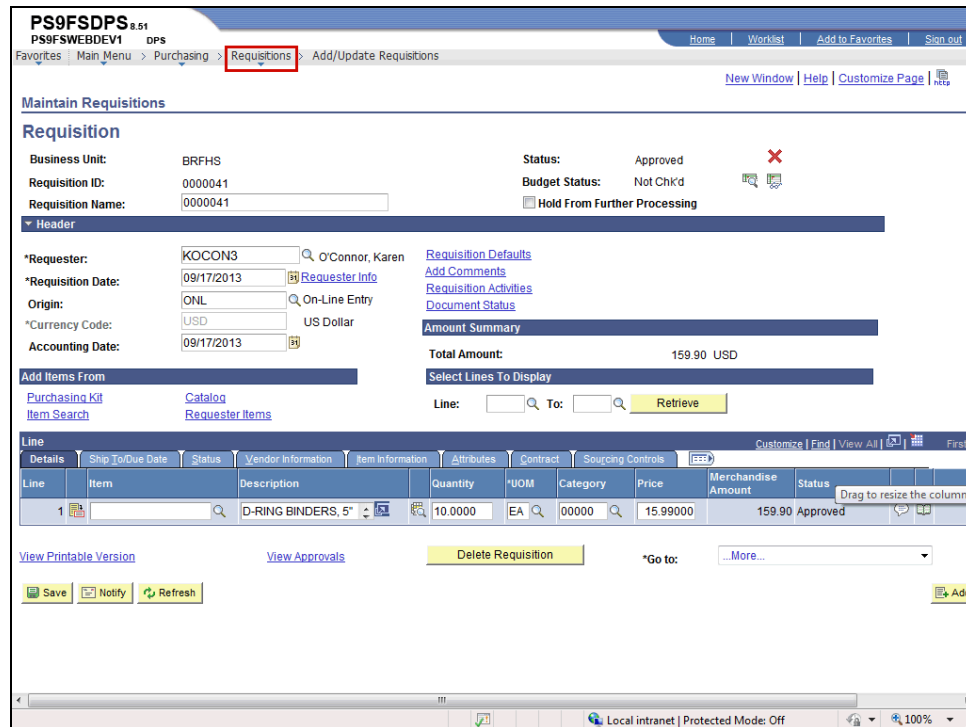
Step	Action
12.	<p>The requisitions displays.</p> <p>Click the Print button.</p> 



Step	Action
13.	<p>You can designate the number of copies you wish to print and then click OK.</p> <p><u>For training purposes only</u>, click the Cancel button.</p> 



Step	Action
14.	<p>Click the Close button.</p> <p><i>This completes the demonstration of View Printable Version.</i></p> 



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PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > **Requisitions** | Add/Update Requisitions

New Window | Help | Customize Page |

Maintain Requisitions

Requisition

Business Unit: BRFHS Status: Approved

Requisition ID: 0000041 Budget Status: Not Chk'd

Requisition Name: 0000041 Hold From Further Processing

▼ Header

*Requester: KOCON3 O'Connor, Karen [Requisition Defaults](#)

*Requisition Date: 09/17/2013 [Requester Info](#)

Origin: ONL On-Line Entry [Add Comments](#)

*Currency Code: USD US Dollar [Requisition Activities](#)

Accounting Date: 09/17/2013 [Document Status](#)

Amount Summary

Total Amount: 159.90 USD

Select Lines To Display

Line: To: [Retrieve](#)

Add Items From

[Purchasing Kit](#) [Catalog](#)




[Item Search](#) [Requester Items](#)

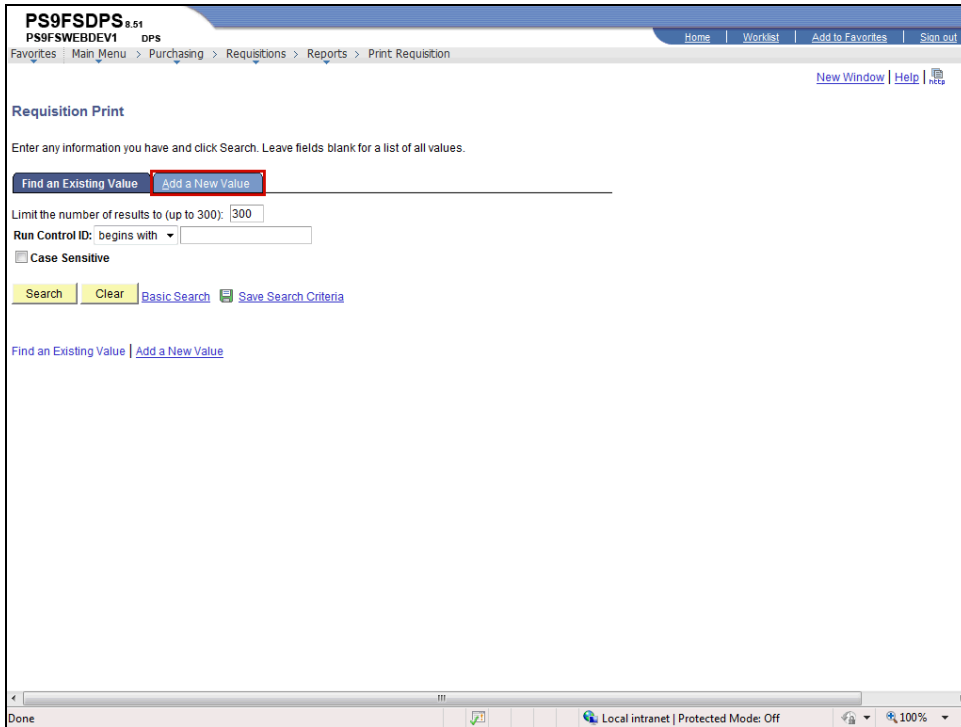
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		D-RING BINDERS, 5"	10.0000	EA	00000	15.99000	159.90	Approved

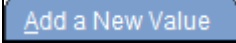
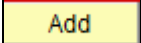
[View Printable Version](#) [View Approvals](#) [Delete Requisition](#) *Go to: [..More...](#)

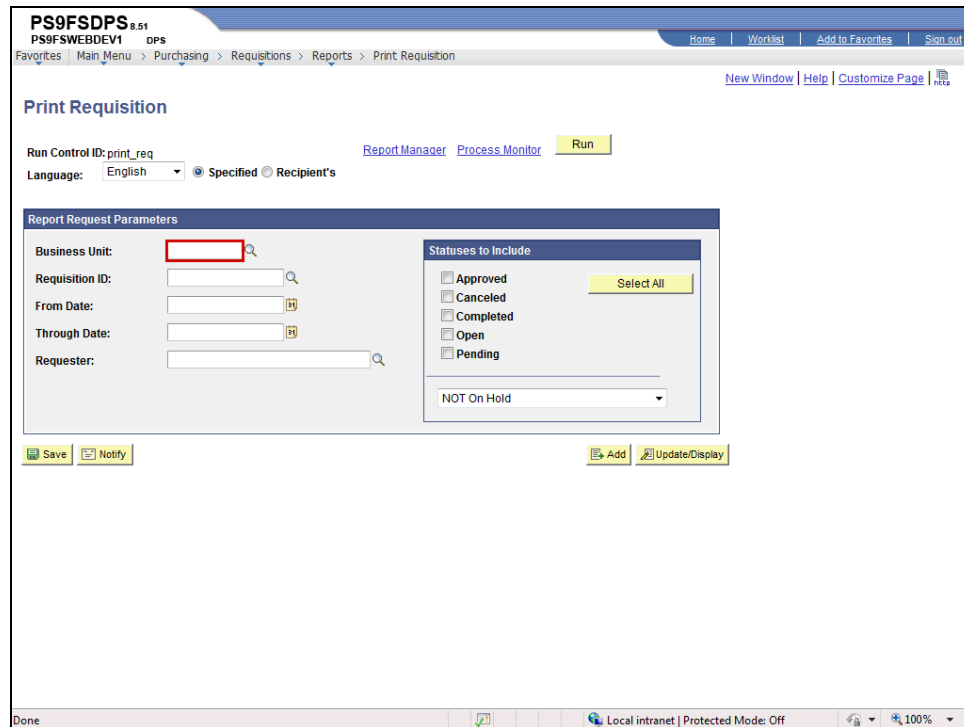
[Save](#) [Notify](#) [Refresh](#) [Add](#)

Local intranet | Protected Mode: Off

Step	Action
15.	<p>The second method, Print a Requisition using the Process Scheduler, will be demonstrated now.</p> <p>Navigate to Purchasing, Requisitions, Reports, Print Requisition, or</p> <p>From displayed breadcrumbs select Requisitions, Reports, Print Requisition.</p> <p>Click the Requisitions button.</p> 
16.	<p>Click the Reports menu.</p> 
17.	<p>Click the Print Requisition menu.</p> 




Step	Action
18.	Click the Add a New Value tab. <i>See the Create/Find a Run Control ID topic for instructions on how to create a valid run control id.</i> 
19.	Enter the desired information into the Run Control ID field. Enter " print_req ".
20.	Click the Add button. 
21.	The parameters you enter on the Print Requisition page will be saved to the specified run control id. When running the report in the future, the user will only change the Requisition ID; all other fields will remain as defaulted.



PS9FSDPS 8.51
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Reports > Print Requisition


New Window | Help | Customize Page | 


Print Requisition


Run Control ID: print_req [Report Manager](#) [Process Monitor](#) [Run](#)


Language: English Specified Recipient's


Report Request Parameters

Business Unit: 

Requisition ID: 

From Date: 

Through Date: 

Requester: 

Statuses to Include

Approved [Select All](#)

Canceled



Completed


Open

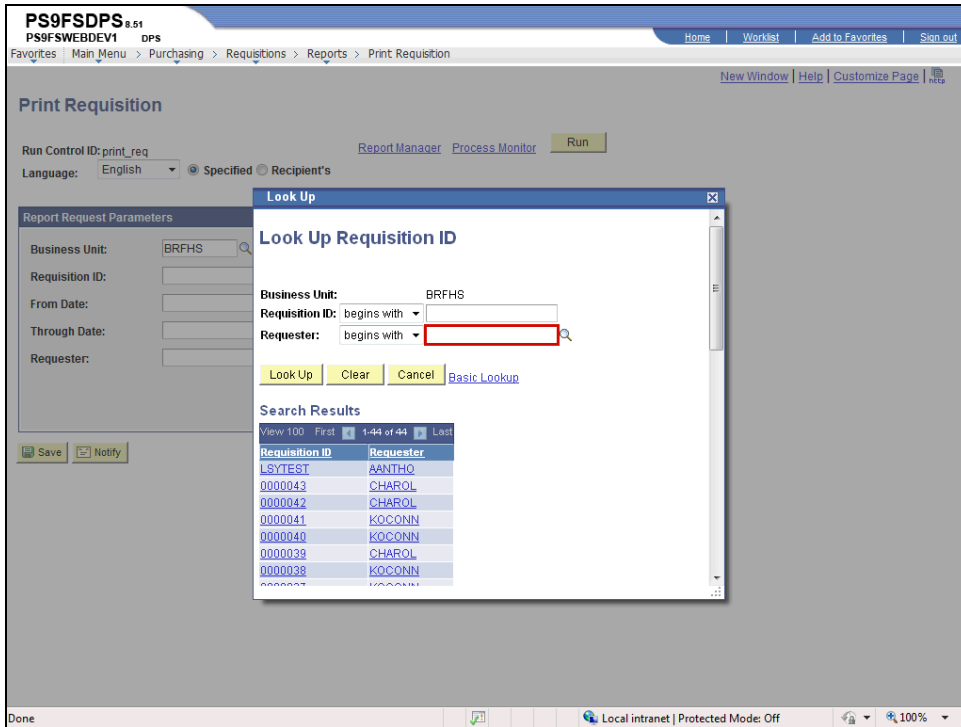
Pending



NOT On Hold

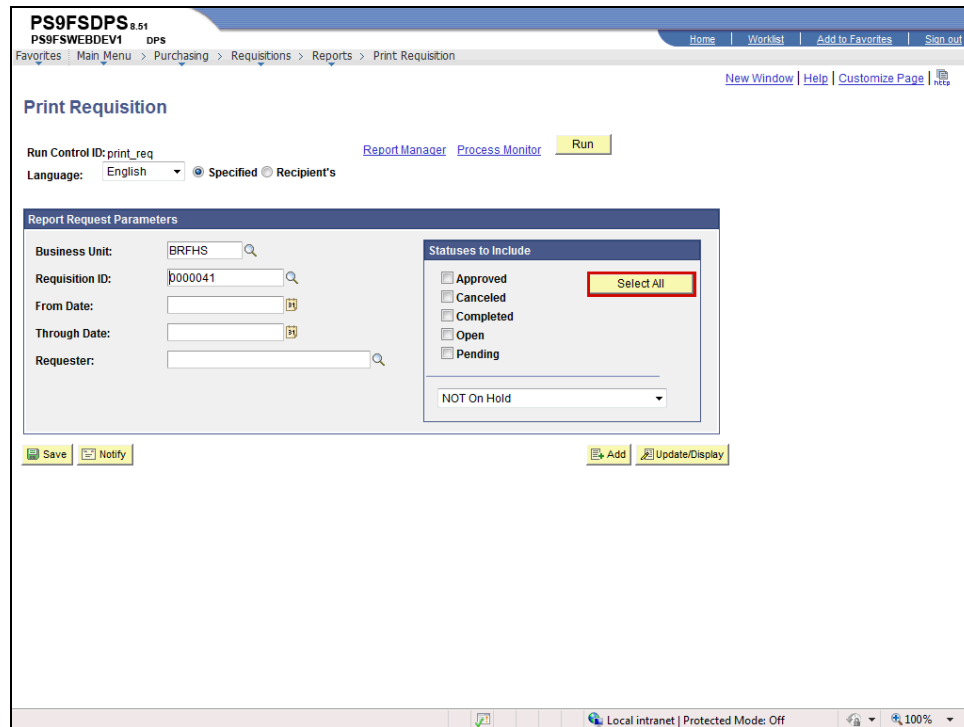
[Save](#) [Notify](#) [Add](#) [Update/Display](#)



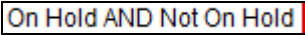
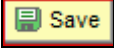
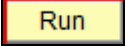
Done Local intranet | Protected Mode: Off   100%

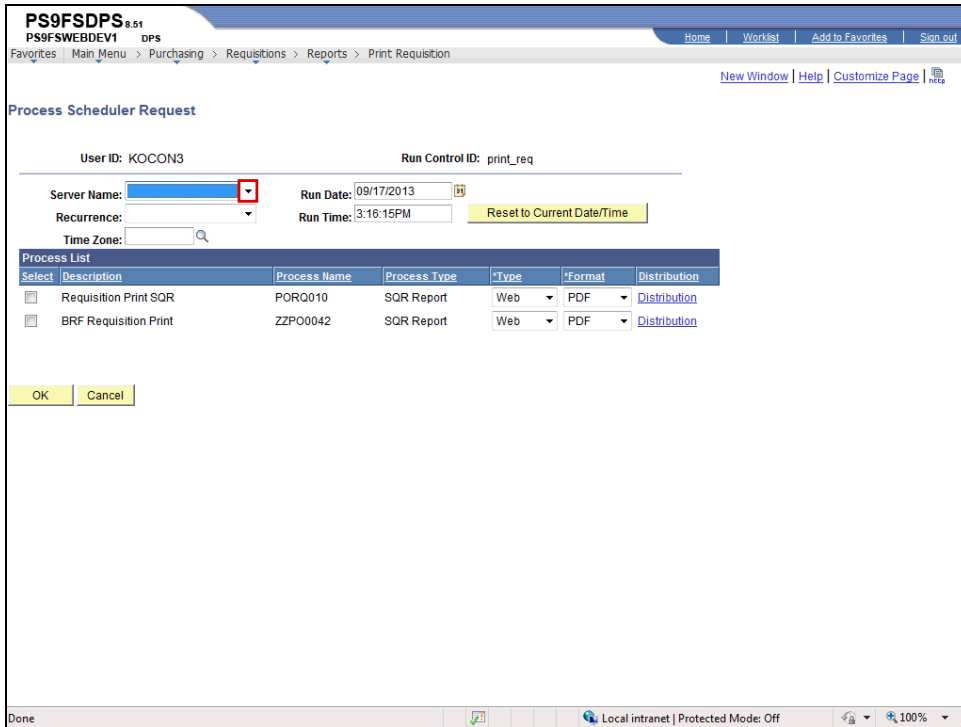
Step	Action
22.	Enter the desired information into the Business Unit field. Enter " BRFHS ".
23.	<p>Requisition ID</p> <p>You may enter your requisition id directly into the Requisition ID field. It is highly recommended that you note the requisition id when attempting to print the requisition and enter it in this page. If you do not know the requisition id, you may search for it as shown in the following steps.</p> <p>Click the Look up Requisition ID button.</p> 



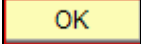


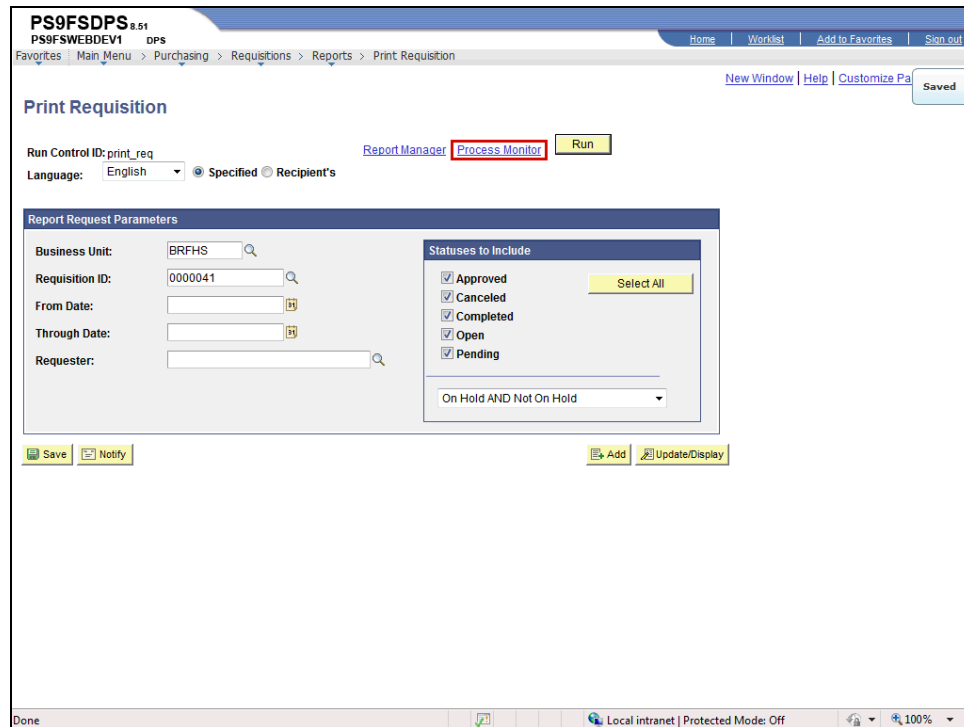
Step	Action
24.	Enter the desired information into the Requester field. Enter " Your Requester ID ".
25.	Click the Look Up button. 
26.	Click the 000041 link. 
27.	NOTE: Do not enter From Date, Through Date or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must be requested and printed ONE AT A TIME</u>, entering the requisition id will be sufficient to identify the requisition.



Step	Action
28.	Click the Select All button. 
29.	Click the button to the right of the NOT On Hold field. 
30.	Click the On Hold AND Not On Hold list item. 
31.	Click the Save button. 
32.	Process Scheduler The Process Scheduler defines the Run Location and Output Destination of the Print Request. Click the Run button. 



Step	Action
33.	Click the Server Name list. 
34.	Click the PSNT list item. 
35.	NOTE: The Type field should default as Web and the Format field should default as PDF. If the Type and Format fields do not properly default, you will need to correct them.
36.	Click the OK button. 



PS9FSDPS 8.51
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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Reports > Print Requisition

New Window | Help | Customize Pa | Saved

Print Requisition

Run Control ID: print_req [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English Specified Recipient's

Report Request Parameters

Business Unit: BRFHS

Requisition ID: 0000041

From Date: []

Through Date: []

Requester: []

Statuses to Include

Approved [Select All](#)

Canceled

Completed

Open

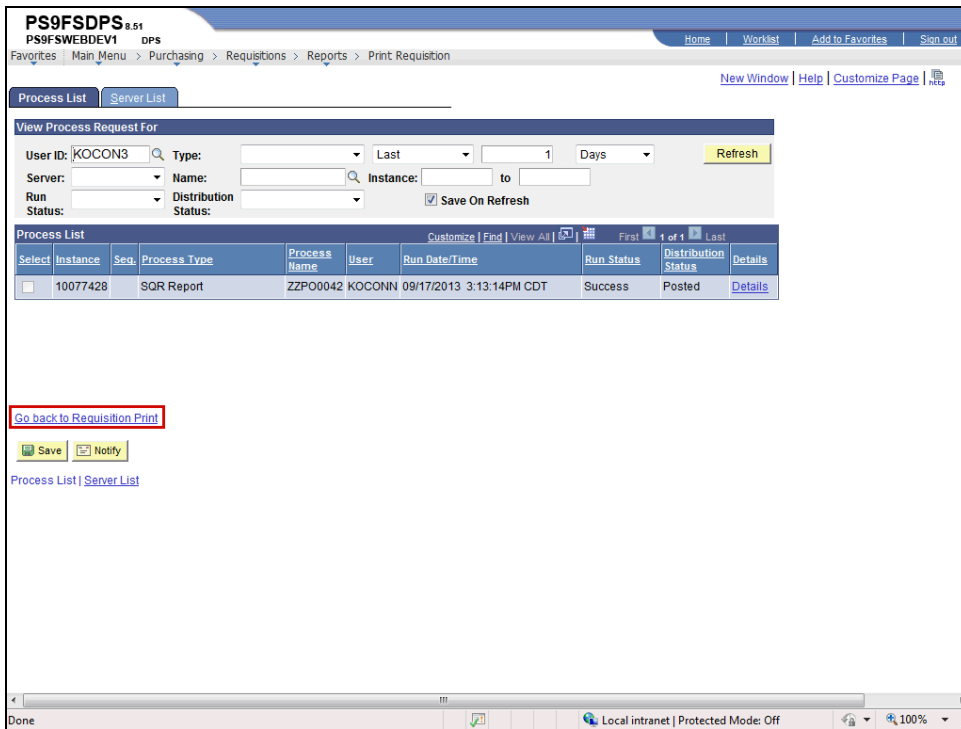
Pending

On Hold AND Not On Hold []

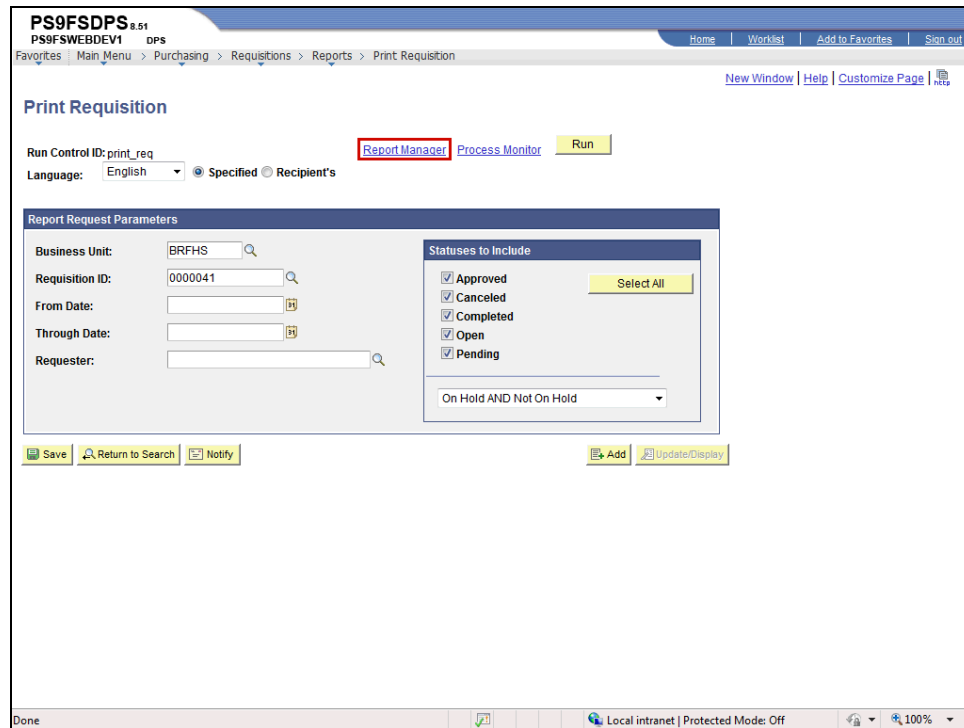
[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Done Local intranet | Protected Mode: Off 100%

Step	Action
37.	Click the Process Monitor link. Process Monitor
38.	If the Run Status is not Success and the Distribution Status is not Posted, click the Refresh button until both statuses are achieved.




Step	Action
39.	Click the Go back to Requisition Print link. Go back to Requisition Print



PS9FSDPS 8.51
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Reports > Print Requisition

New Window | Help | Customize Page | 

Print Requisition

Run Control ID: print_req [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English Specified Recipient's

Report Request Parameters

Business Unit:	<input type="text" value="BRFHS"/>	<input type="button" value="Q"/>
Requisition ID:	<input type="text" value="0000041"/>	<input type="button" value="Q"/>
From Date:	<input type="text"/>	<input type="button" value="H"/>
Through Date:	<input type="text"/>	<input type="button" value="H"/>
Requester:	<input type="text"/>	<input type="button" value="Q"/>

Statuses to Include

Approved [Select All](#)

Canceled




Completed

Open

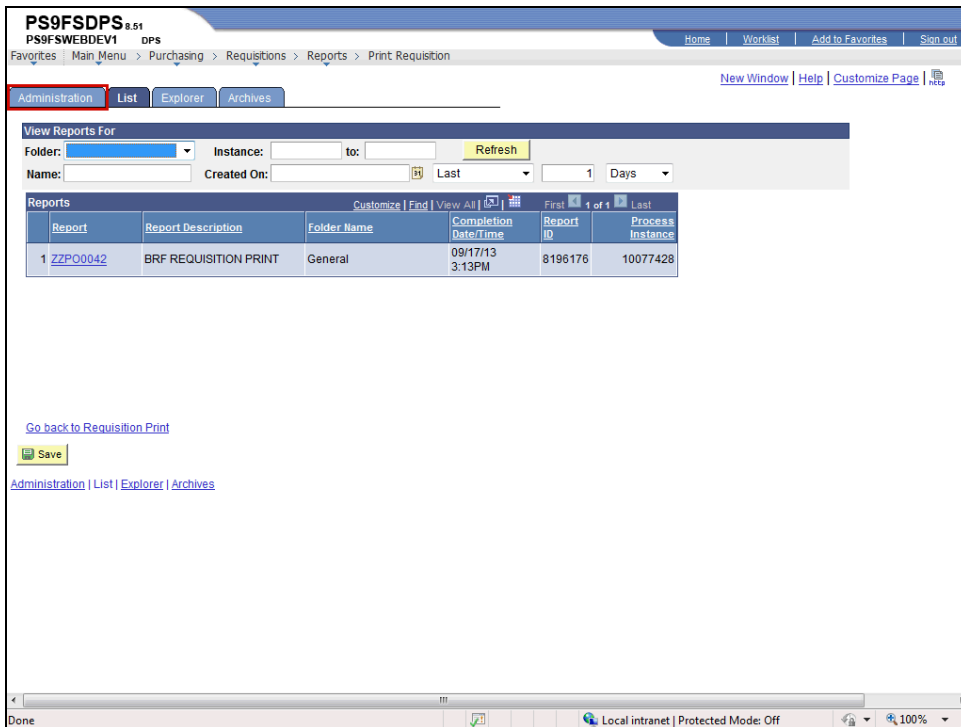
Pending


On Hold AND Not On Hold

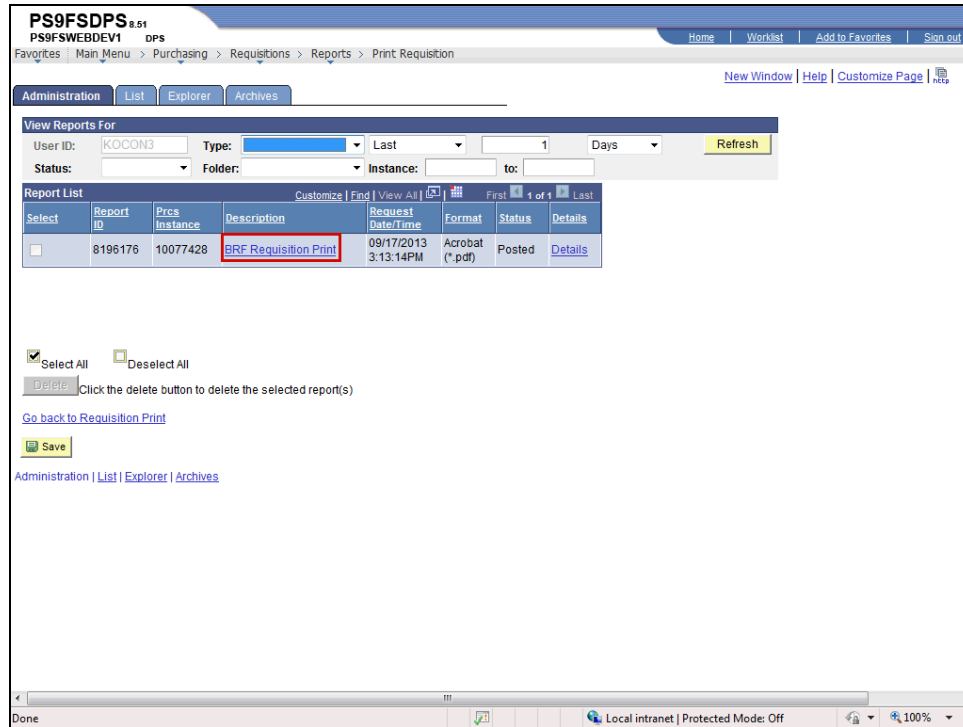
[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Done Local intranet | Protected Mode: Off    100%

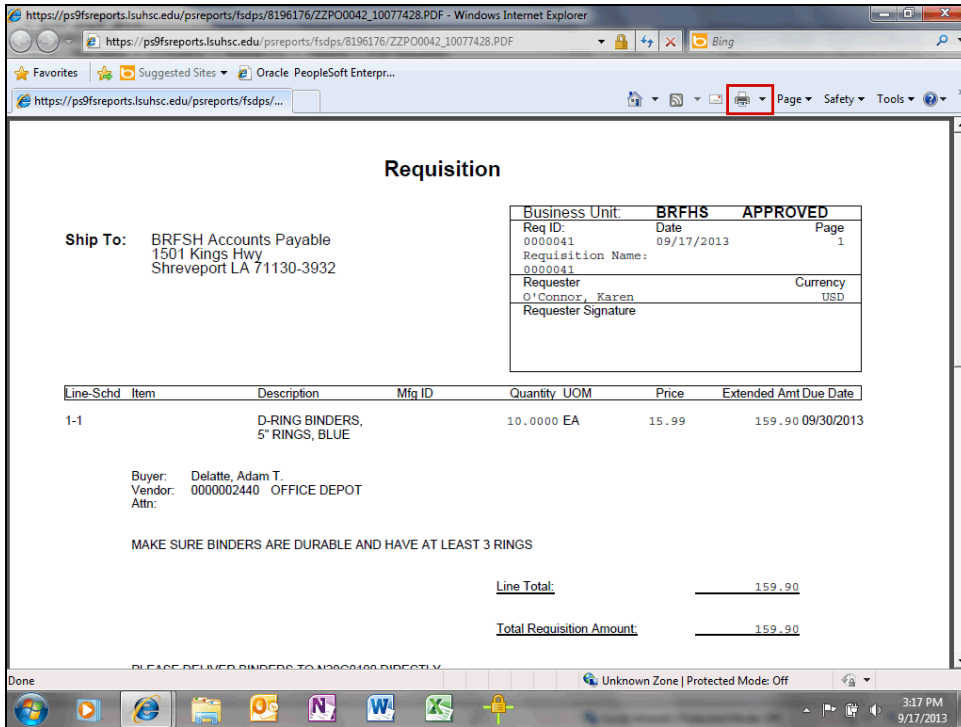
Step	Action
40.	Click the Report Manager link. Report Manager




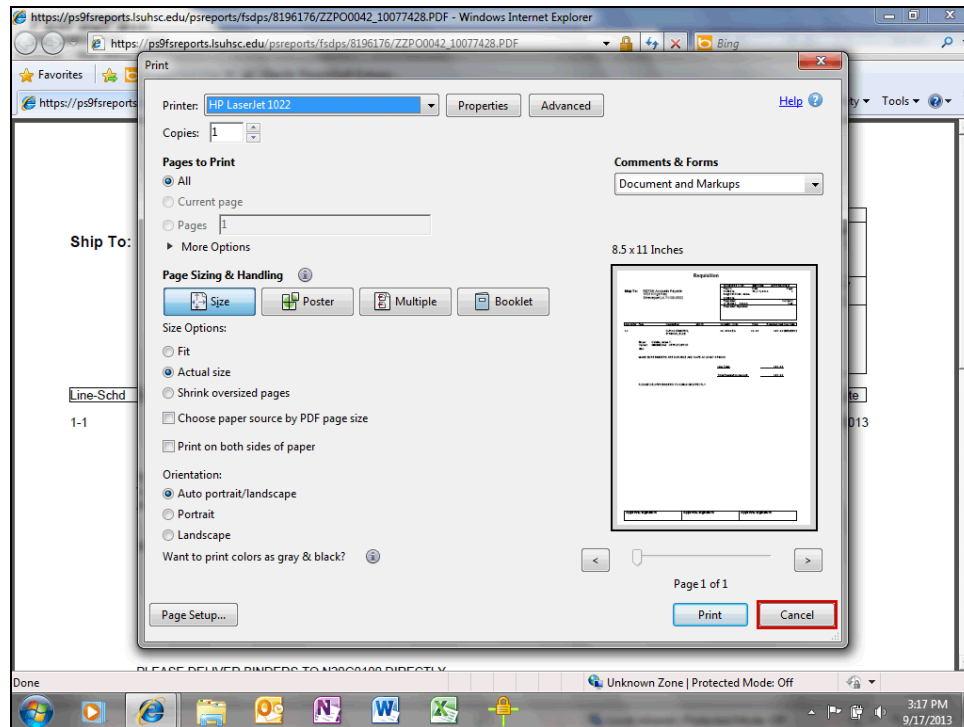
Step	Action
41.	Click the Administration tab. 
42.	The report is complete and ready for viewing when Requisition Print SQR under the Description column turns into a blue hyperlink and the Status = Posted . If the Status was not Posted, you would click the Refresh button until the Status = Posted and the BRF Requisition Print in the Description column became a blue link.

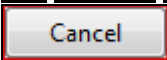



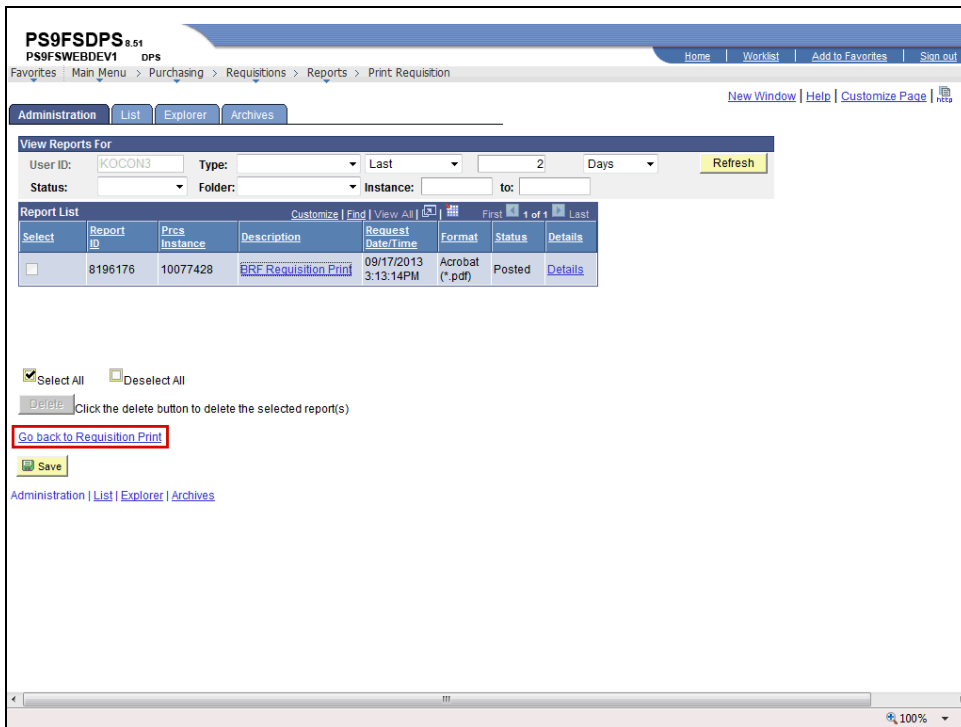
Step	Action
43.	<p>Click the BRF Requisition Print link.</p> <p>The requisition will open and display in a new window.</p> <p>BRF Requisition Print</p>



Step	Action
44.	Click the Print button. 



Step	Action
45.	<p>You can designate the number of copies you wish to print and then click OK.</p> <p>For training purposes only, click the Cancel button.</p> 
46.	<p>Click the Close button.</p> 

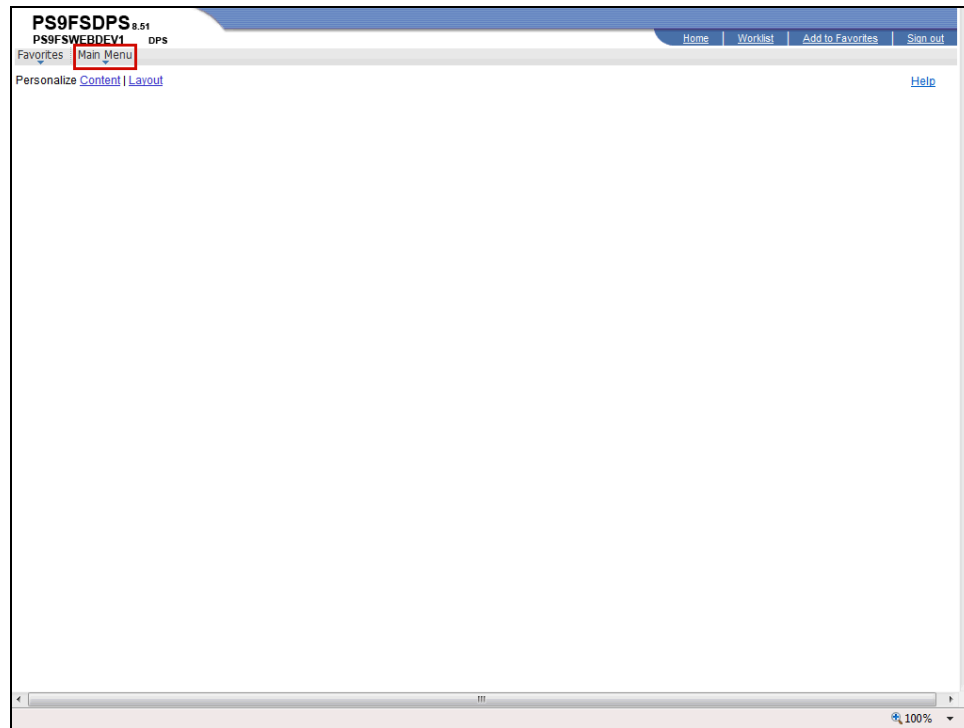




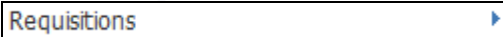
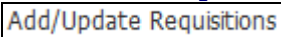
Step	Action
47.	Click the Go back to Requisition Print link. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Go back to Requisition Print </div>
48.	This completes <i>Print a Requisition</i> . End of Procedure.

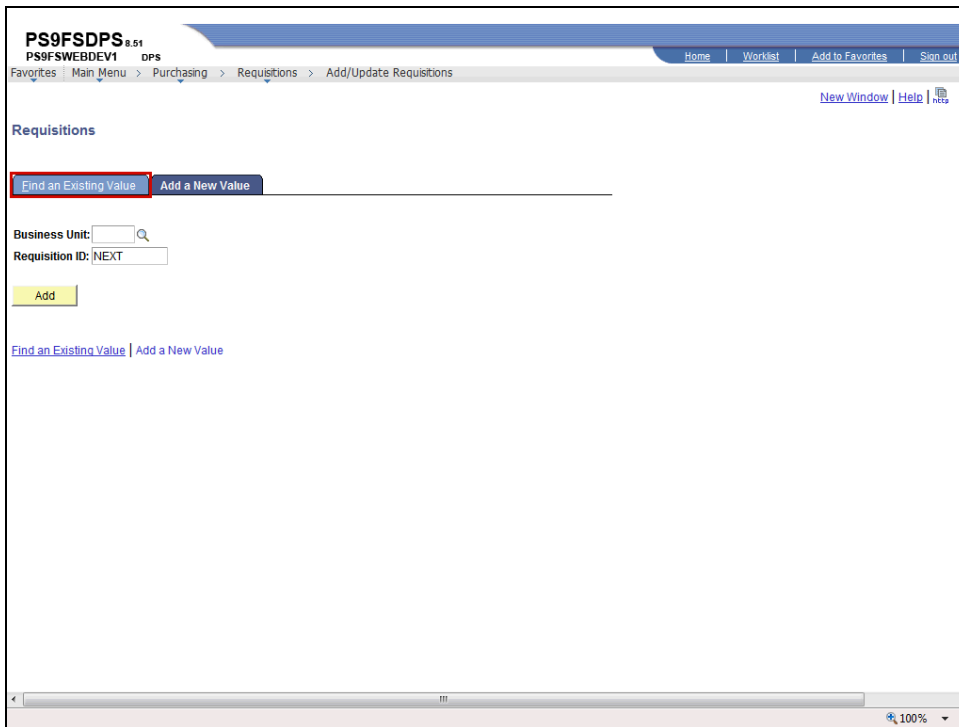
View an Existing Requisition and the Activity Log


Procedure

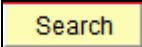

In this topic you will learn how to **View an Existing Requisition and the Activity Log**.

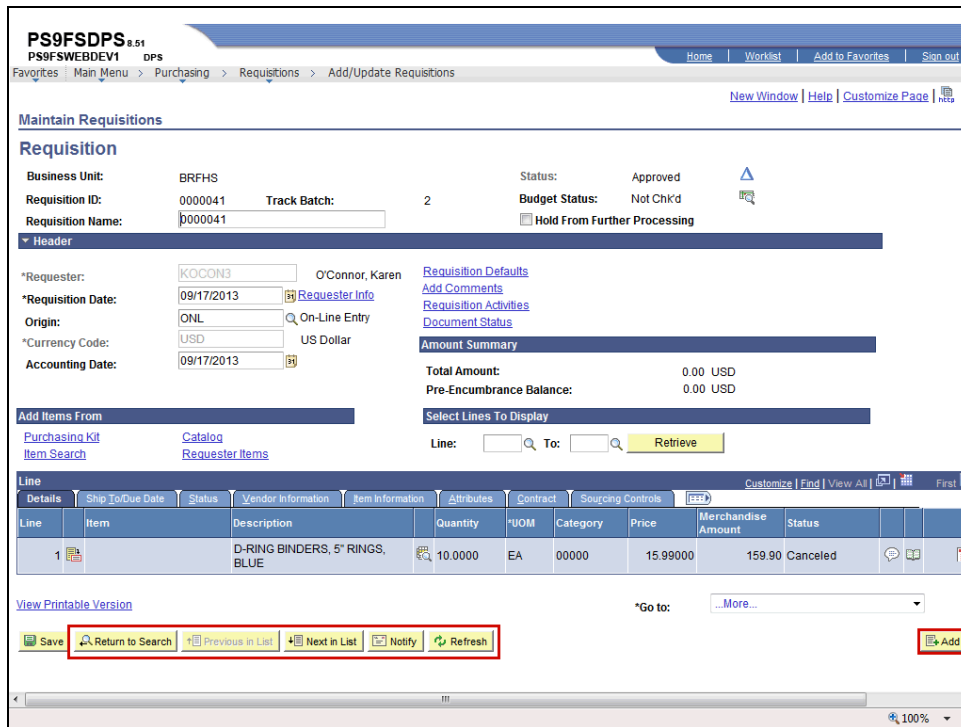


Step	Action
1.	Click the Main Menu button. 
2.	Click the Purchasing menu. 
3.	Click the Requisitions menu. 
4.	Click the Add/Update Requisitions menu. 

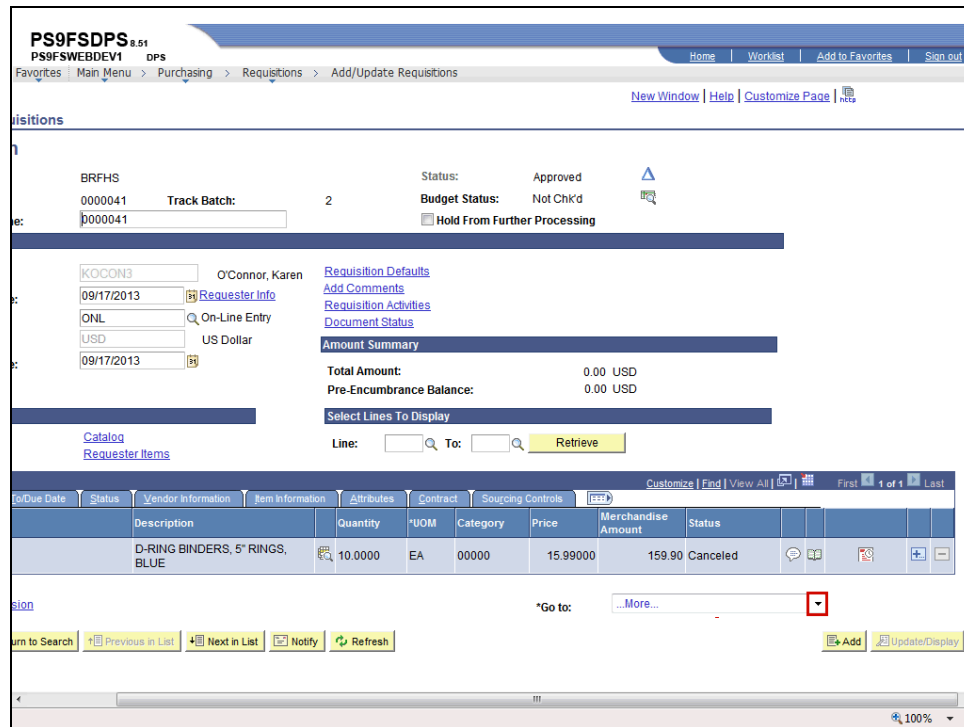


Step	Action
5.	Click the Find an Existing Value tab to search for an existing requisition. 
6.	Enter the desired information into the Business Unit field. Enter " BRFHS ".
7.	Find an Existing Value To find an existing requisition, you must enter all or part of one of the following search criteria: <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; or • Requester – to view the requisitions entered by a specific person.
8.	Requisition ID It is highly recommended you make a note of your Requisition ID after saving your requisitions, so that you can enter it directly onto the search page when searching for an existing requisition.
9.	Search for a Requester It is recommended the Requester option be used as the search parameter when searching for existing requisition id. You must enter the requester's user id in the Requester field. If you enter the requester's name in the Requester field, you will receive the following message: " No matching values found ". <i>NOTE: Other than Requisition ID and Requester, the remaining displayed search options are <u>not</u> recommended for use as search parameters.</i>

Step	Action
10.	<p>The Requester field is not case sensitive. However, if the Case Sensitive checkbox is checked, you must enter the Requester information in ALL CAPITAL (CAPS) letters. Checking the Case Sensitive box will limit your results since the system will only be looking for an ALL CAPS match. If the Case Sensitive box is unchecked, you will retrieve all records, regardless of whether the text is in ALL CAPS.</p> <p><i>NOTE: It is recommended that the Case Sensitive and Hold From Further Processing boxes remain as defaulted.</i></p>
11.	<p>Enter the desired information into the Requester field. Enter "Your User ID".</p>
12.	<p>Click the Search button.</p> <p><i>NOTE: The Search results will display at the bottom of the page.</i></p> 
13.	<p>The results will display in descending order with the most recent requisition at the top of the list.</p> <p><i>NOTE: If a specific Requisition ID was entered, the Maintain Requisitions page associated with the Requisition ID will display. The option list would not display at the bottom of the page.</i></p> <p>Click the 0000041 link.</p> 
14.	<p>Once the Hold From Further Processing box is unchecked and the requisition saved, the end-user may not enter any additional information into the requisition.</p>





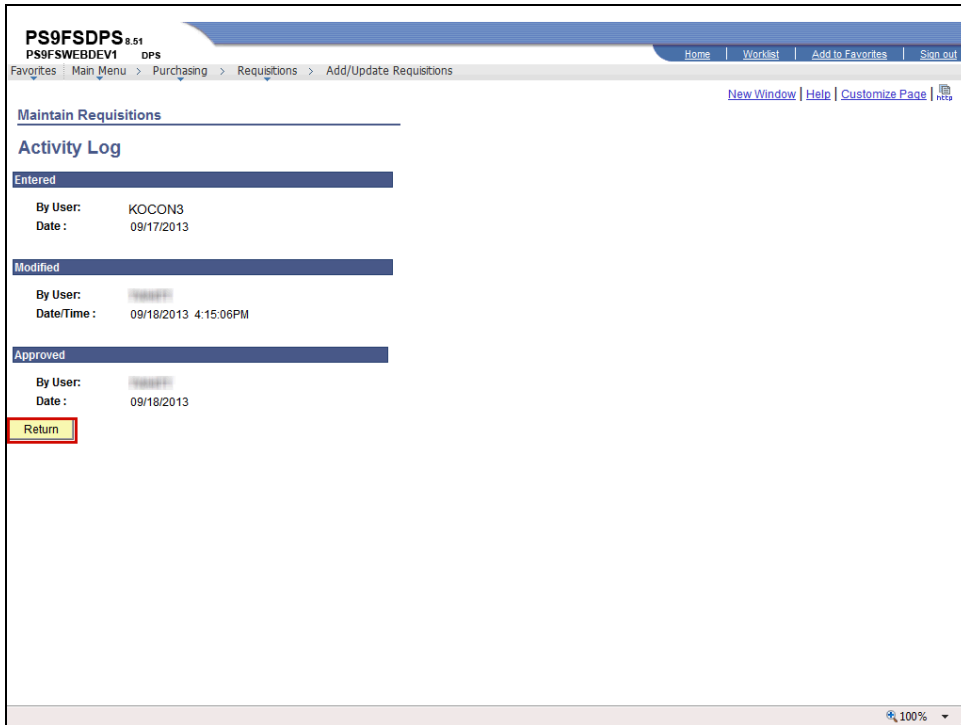
Step	Action
15.	<p>Buttons on the Maintain Requisitions page</p> <p>Return to Search button allows you to return to the list of requisitions retrieved on the Search page;</p> <p>Previous in List button also you to view the previous requisition in the list of requisitions retrieved on the Search page. The Previous in List button in this example is greyed out because it is the first requisition in the search results list;</p> <p>Next in List button allows you to view the next requisition in the list of requisitions retrieved on the Search page;</p> <p>Notify buttons allows you to e-mail the requisition page;</p> <p>Refresh button is used to update the information on the page.</p> <p>Delete Requisitions button (not viewable on this page) should <u>never be used</u> by the end-user; and</p> <p>Add button takes you directly to the Add a New Value tab to create a new requisition.</p>

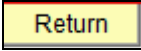


The screenshot shows the 'Add/Update Requisitions' page in the PS9FSDPS 8.51 application. The requisition is for BRFHS, with a status of 'Approved' and a budget status of 'Not Chk'd'. The requester is Karen O'Connor. The table below shows one line item: 'D-RING BINDERS, 5" RINGS, BLUE' with a quantity of 10,000 and a price of 15.99000, resulting in a merchandise amount of 159.90. The status of this line item is 'Canceled'. A red box highlights a dropdown arrow next to the 'Go to:' field.

Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
D-RING BINDERS, 5" RINGS, BLUE	10.0000	EA	00000	15.99000	159.90	Canceled

Step	Action
16.	Click the button to the right of the Go to field. 
17.	Click the 02-Activity Log list item. 
18.	The Activity Log will indicate the following: <ul style="list-style-type: none"> 1. Entered - the User ID of the Requester and the date the requisition was entered into the system; 2. Modified - the User ID of the person who most recently modified the requisition, and the date and time the modifications were entered into the system; and 3. Approved - the User ID of the person who Approved the requisition, and the date and time the requisition was approved.



Step	Action
19.	Click the Return button. 
20.	This completes <i>View an Existing Requisition and the Activity Log</i> . End of Procedure.

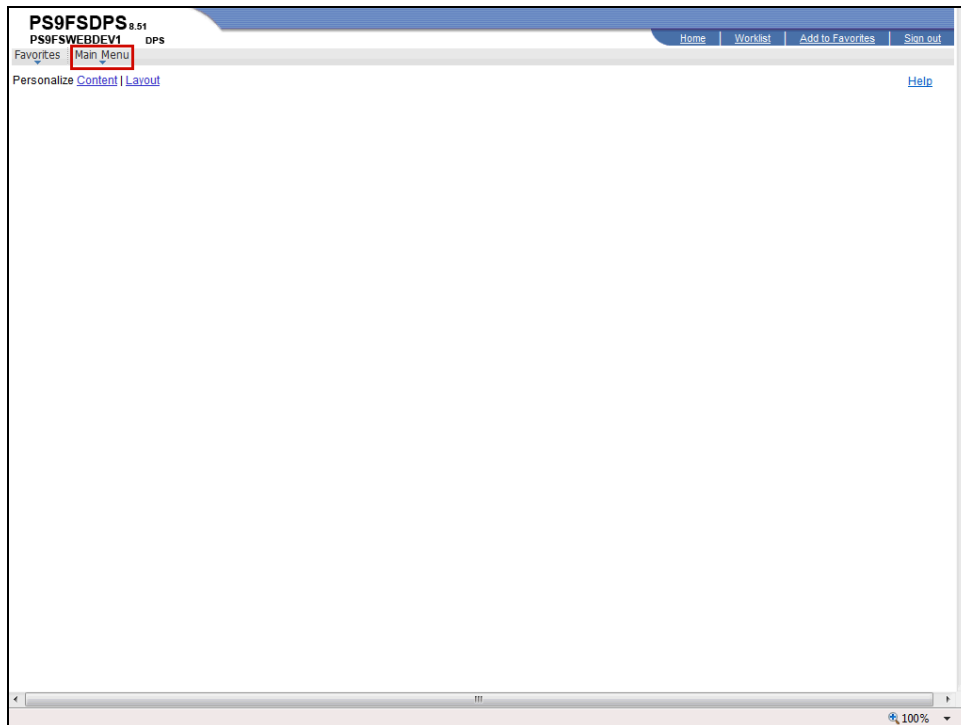
Copy a Requisition

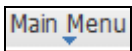


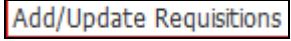
Copy

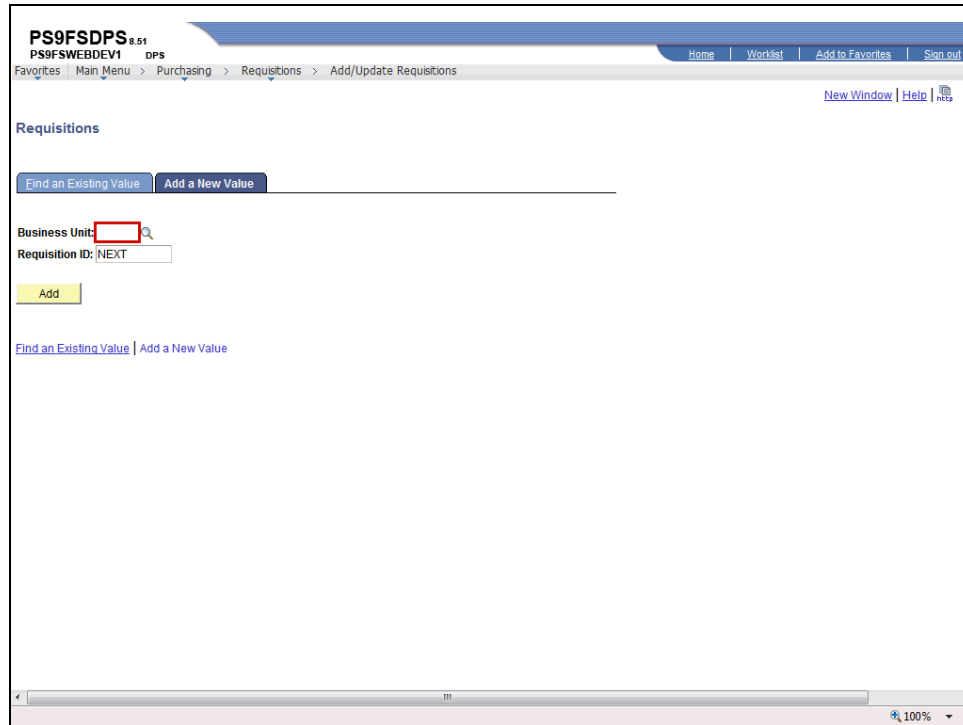
Procedure

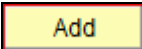
In this topic you will learn how to **Copy a Requisition**.

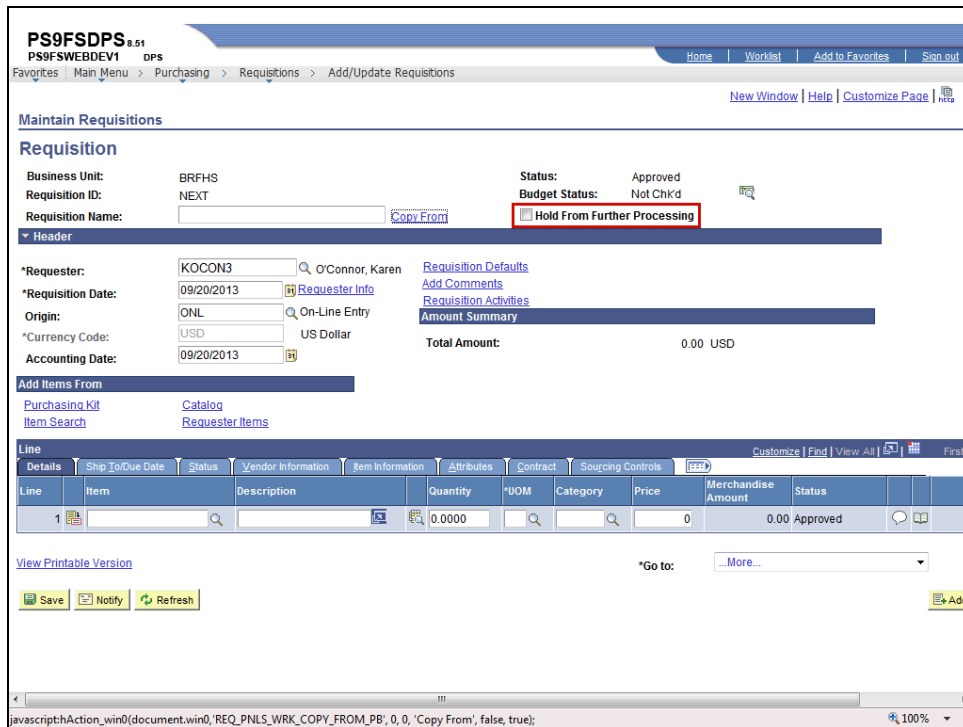
Step	Action
1.	<p>Scenario</p> <p>You may copy your own requisitions or the requisition of another Requester. In this exercise you will enter a new requisition by copying a requisition from another Requester using the Copy From option.</p>
2.	<p>When copying a requisition you will <u>not</u> perform Step 1: Enter Requisition Defaults. The defaults, line item(s), distribution of funds, and comments are being brought into the new requisition from the requisition that is being copied. Once copied, the Requester will make any necessary additions/changes/deletions to the line items, Schedule page, Distribution page and/or Comments page.</p> <p><i>NOTE: It is recommended to enter a new requisition rather than copying a requisition if extensive changes will be made to the copied requisition.</i></p>


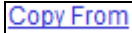


Step	Action
3.	Click the Main Menu button. 
4.	Click the Purchasing menu. 
5.	Click the Requisitions menu. 
6.	Click the Add/Update Requisitions menu. 



Step	Action
7.	A new requisition must be added in order to copy a requisition. Enter the desired information into the Business Unit field. Enter " BRFHS ".
8.	Click the Add button. 



Step	Action
9.	Click the Hold From Further Processing option. 
10.	Requisition Name – this is a free text field and can be used to enter a description of the items being purchased. If the field is not populated upon saving it will be populated with the requisition id.
11.	<p>Copy a Prior Year Requisition for Next Fiscal Year</p> <p>In this exercise you are copying a requisition for the same fiscal year. When you are copying an existing requisition (i.e. from the current or a prior fiscal year) into a requisition for the next fiscal year, the Accounting Date <u>must</u> be changed. The Accounting Date change <u>must</u> be made prior to copying the old requisition into the new requisition so the Budget Period defaults to the next fiscal year. If the Budget Period is not correct, an error message will be received when saving the requisition stating that the Accounting Date and Budget Period do not match. The Due Date <u>must</u> also be changed to reflect receipt in the next fiscal year. The Requisition Date may remain as defaulted.</p> <p>The dates must be changed as follows when copying a requisition for the next fiscal year: Accounting Date - 07/01/XX (the next fiscal year); and Due Date - 07/01/XX or later for the next fiscal year.</p>
12.	Click the Copy From link. 

Step	Action
13.	<p>Search for an Existing Requisition to Copy</p> <p>To search for an existing requisition to copy, you may enter all or part of one of the following search criteria:</p> <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; or • Requester – to view requisitions associated with a specific requester.
14.	<p>Requisition ID</p> <p>It is highly recommended you note your Requisition ID you wish to use when copying a requisition and enter it into the search page. If you do not know the Requisition ID, you may search for it by clicking the Look Up Requisition ID magnifying glass.</p>
15.	<p>Requester</p> <p>You must enter the user id of the person whose requisition you wish to copy in Requester field. The user id must be entered in ALL CAPS. If you enter the requester's name in the Requester field, or enter the user id in lower case, you will receive a warning message stating you entered an invalid value. If you do not know the requester's user id, you may search for it using the following steps.</p> <p><i>NOTE: It is not recommended that any of the remaining options be used when searching for a requester user id.</i></p>

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Customize Page

Maintain Requisitions

Copy Requisition


Header

Business Unit: BRFHS

Requisition ID:

Requisition Name:

Req Status: Origin:

Requester: 

Requester Name:

Requisition Date: To:

Vendor SetID: BRFHH [Vendor Lookup](#)

Vendor ID: [Vendor Details](#) Vendor Name:


Item SetID: BRFHS Item ID:

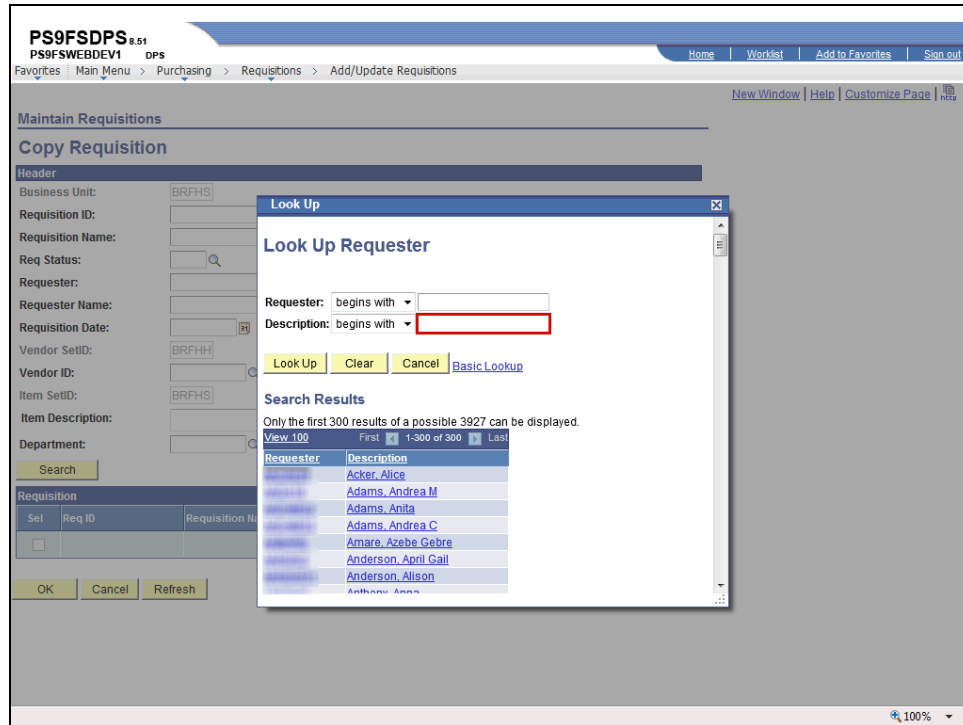
Item Description: Direct Ship

Department:

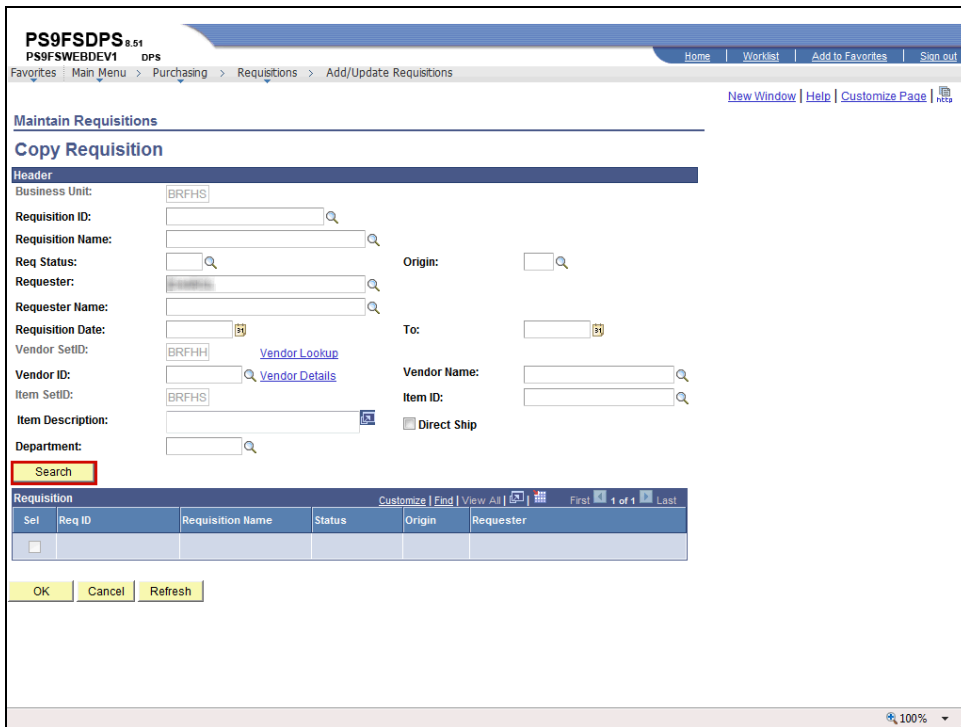
Set	Req ID	Requisition Name	Status	Origin	Requester
<input type="checkbox"/>					

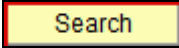


100%

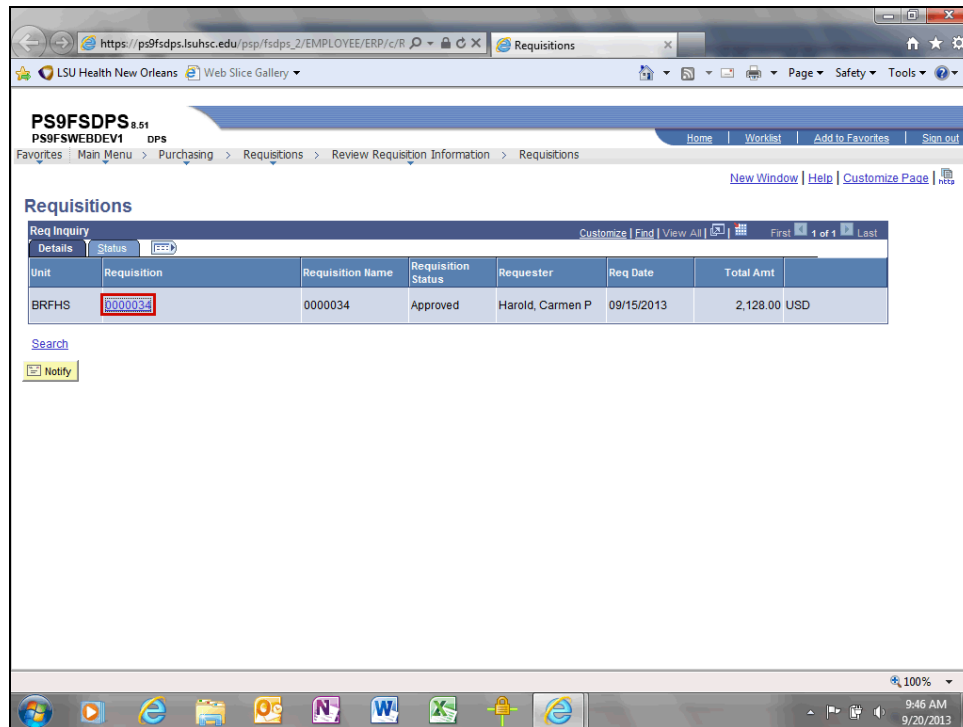
Step	Action
16.	Click the Requester button. 




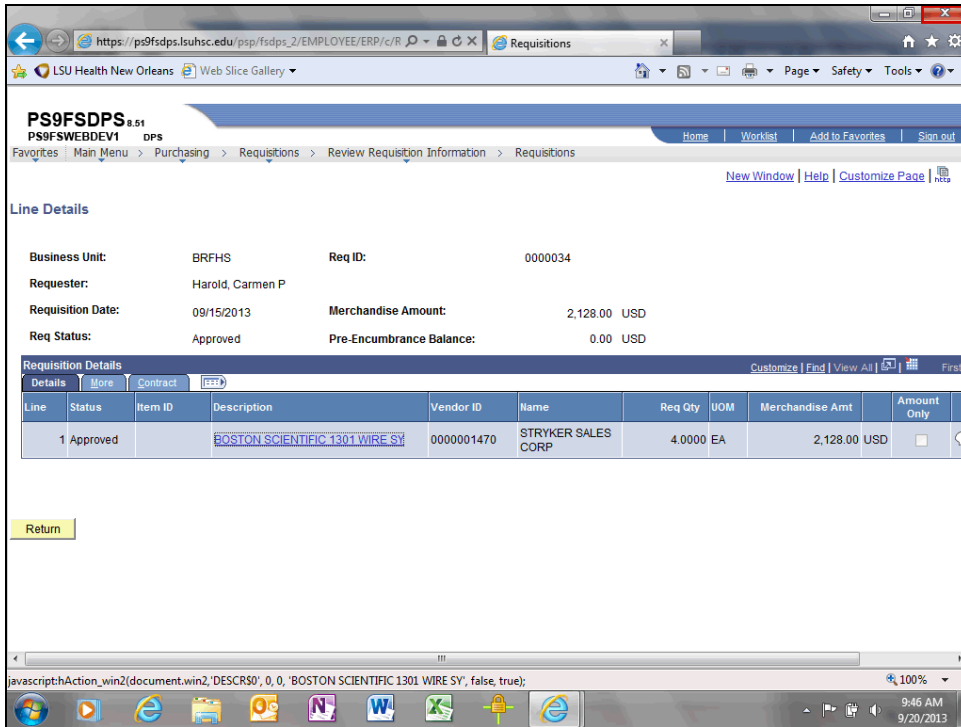
Step	Action
17.	<p>You will search for the User ID using the Description field. The Description column display users' names. You will enter all or part of the user's Last Name in the Description field.</p> <p>Enter the desired information into the Description field. Enter "Buyer's Last Name".</p>
18.	<p>Click the Look Up button.</p> <p>Look Up</p>
19.	<p>Click the Harold, Carmen P link.</p> <p>Harold, Carmen P</p>




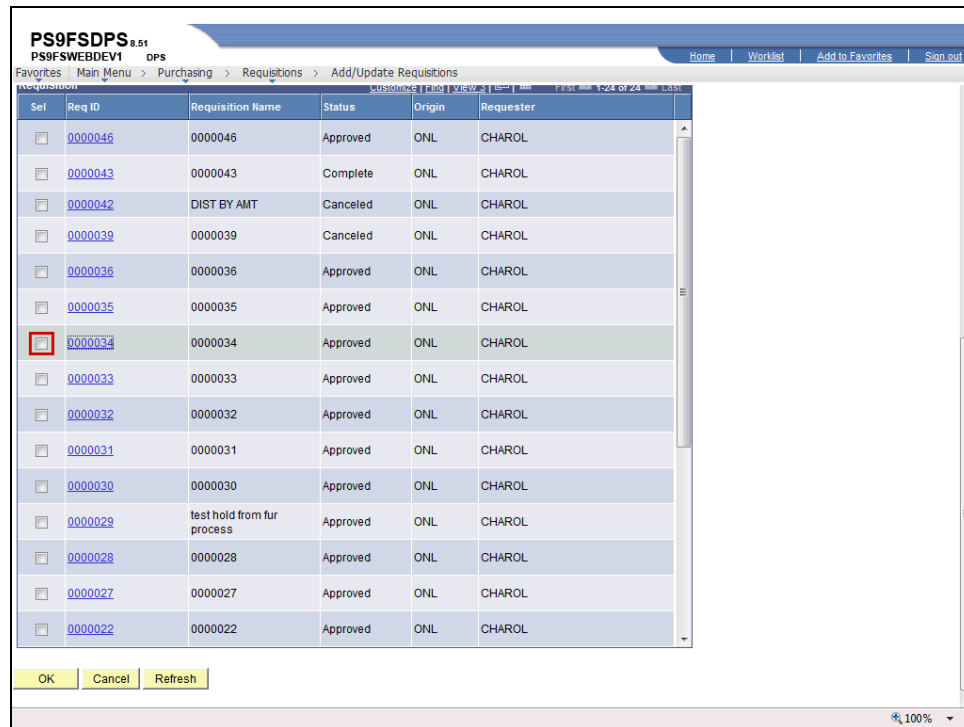
Step	Action
20.	Click the Search button to view a list of available requisitions for the specified requester. 
21.	You are viewing options 1 - 3 of 24 options for this requester. You can use the right arrow to view the next group of 3 options, or you can click the View All link to view the all 24 options.
22.	Click the View All link. 
23.	Click the Req ID to view requisition information. <i>NOTE: This will open a new window and display the Requisition Inquiry page.</i> Click the 000034 link. 


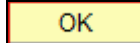


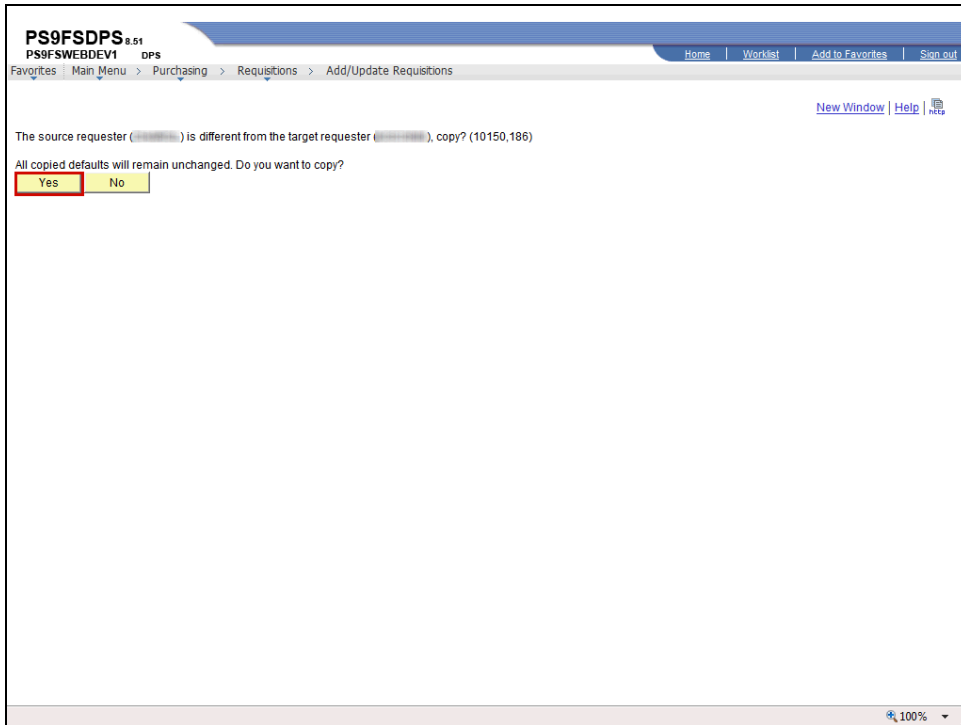
Step	Action
24.	<p>The Requisitions page displays. Click the Requisition link to view line items and other requisition details.</p> <p><i>NOTE: This will take you to the Line Details page.</i></p> <p>Click the 0000034 link.</p> 

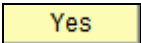


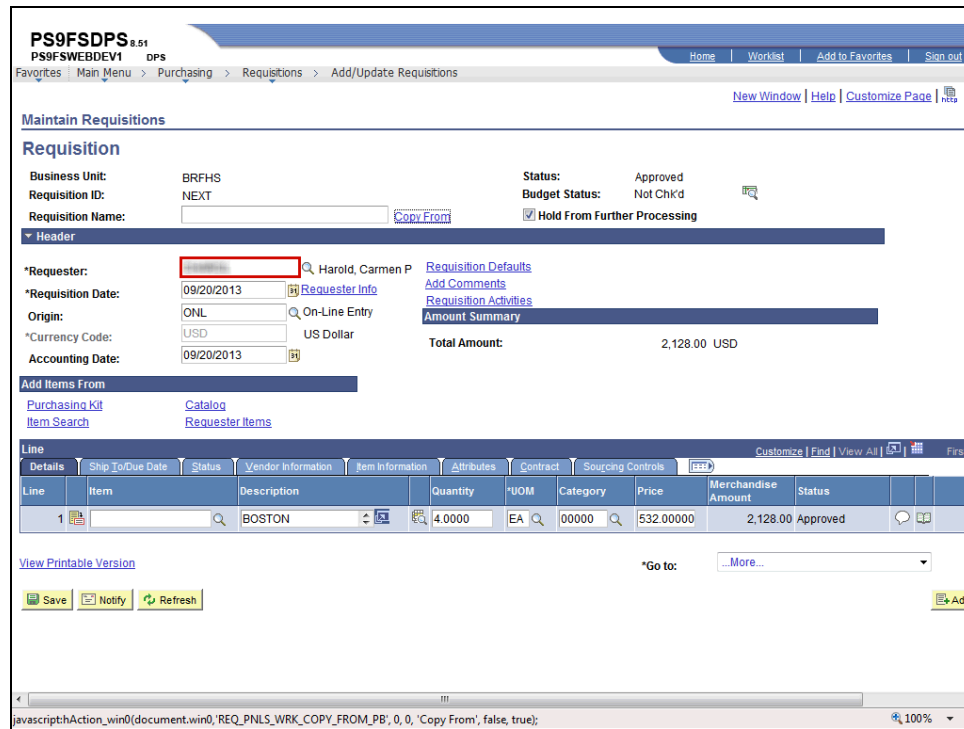
Step	Action
25.	<p>Review the requisition information to determine if this is the requisition you wish to copy.</p> <p>Click the Close button.</p> 
26.	<p>NOTE: If this is not the desired requisition, you will click other Requisition ID links and repeat the previous steps until the desired requisition is located.</p>

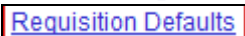
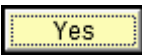


Step	Action
27.	When you find the requisition you wish to copy, click the Sel - 0000034 option. 
28.	Click the OK button. 

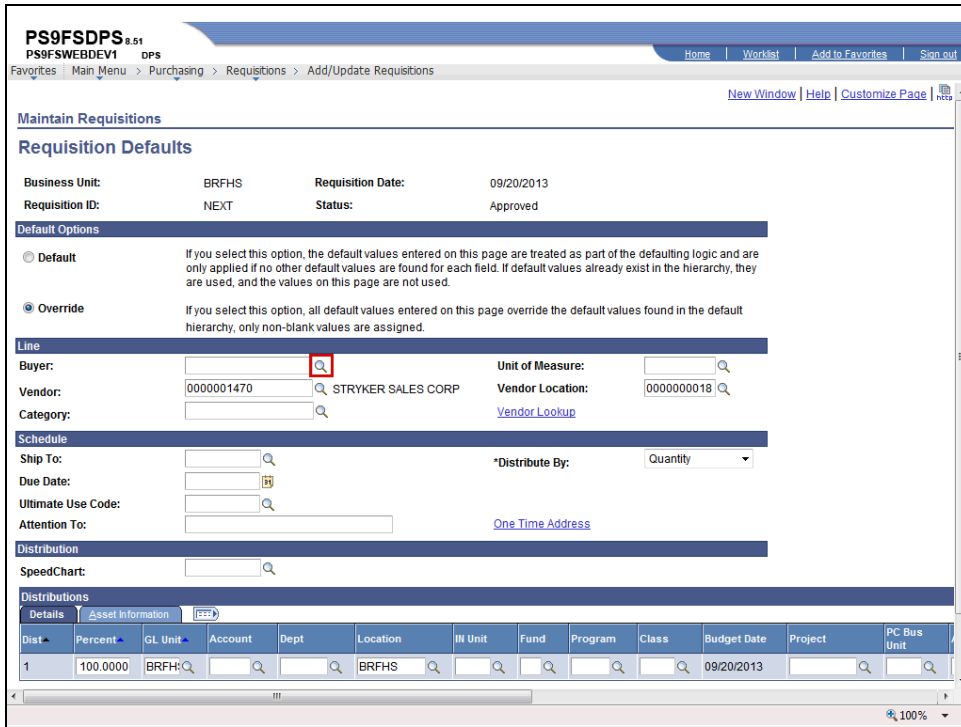



Step	Action
29.	<p>A message displays to verify you want to copy the selected requisition information onto the new requisition.</p> <p>When you copy a requisition of another Requester, you will receive a message stating that the source requester (i.e. the person whose requisition you are copying) is different from the target requester (i.e. you). This means the defaults brought in from the copied requisition will remain the same once copied into the new requisition. Since this is not your requisition that you are copying, the system is warning you the defaults on the requisition being copied may not be same as the defaults you will be using. If the defaults are different, you will need to make the necessary changes on the Schedule and Distribution pages of the new requisition.</p> <p>Click the Yes button.</p> 

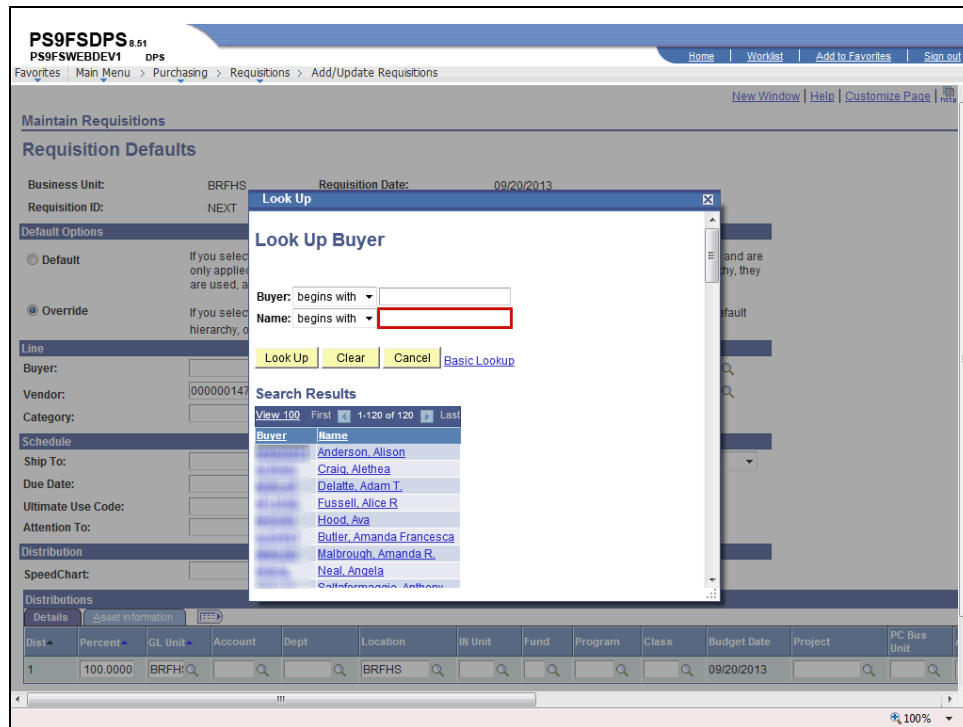




Step	Action
30.	<p>The Requester's User ID for the requisition you copied will default into the Requester field. You must enter your User ID into the Requester field when this occurs. If you were to copy your own requisition, no changes would need to be made to the Requester field.</p> <p>NOTE: You <u>must</u> enter your User ID in ALL CAPS into the Requester field.</p> <p>The information from the copied requisition displays in the new requisition.</p> <p>NOTE: Any changes that you make to the new requisition will not affect the original requisition that you copied.</p> <p>Enter the desired information into the Requester field. Enter "Your User ID".</p>
31.	<p>Click the Requisition Defaults link.</p> <p></p>
32.	<p>A warning message displays.</p> <p>Click the Yes button.</p> <p></p>

Step	Action
33.	<p>You must either enter default information onto the Requisitions Defaults page or on the Distribution page for each line. In this example, you will make the following changes on the Requisitions Defaults page.</p> <p>Requisition Defaults: Buyer - Delatte, Adam Ship To - BRFHS Due Date - 09/30/13 Account - 545700 Dept - 2036380 Location - N20G0100</p>



Step	Action
34.	<p>Click the Buyer button.</p> 



Step	Action
35.	Enter the desired information into the Name field. Enter " Buyer's Last Name ".
36.	Click the Look Up button. 
37.	Click the Buyer's User ID link. 

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Requisitions > Add/Update Requisitions

Business Unit: BRFHS Requisition Date: 09/20/2013
Requisition ID: NEXT Status: Approved

Default Options




Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.


Line

Buyer: Delatte, Adam T. Unit of Measure:
Vendor: 0000001470 Stryker Sales Corp Vendor Location: 0000000018
Category: [Vendor Lookup](#)


Schedule

Ship To:  *Distribute By: Quantity
Due Date: 
Ultimate Use Code: 
Attention To: [One Time Address](#)

Distribution

SpeedChart: 


Distributions

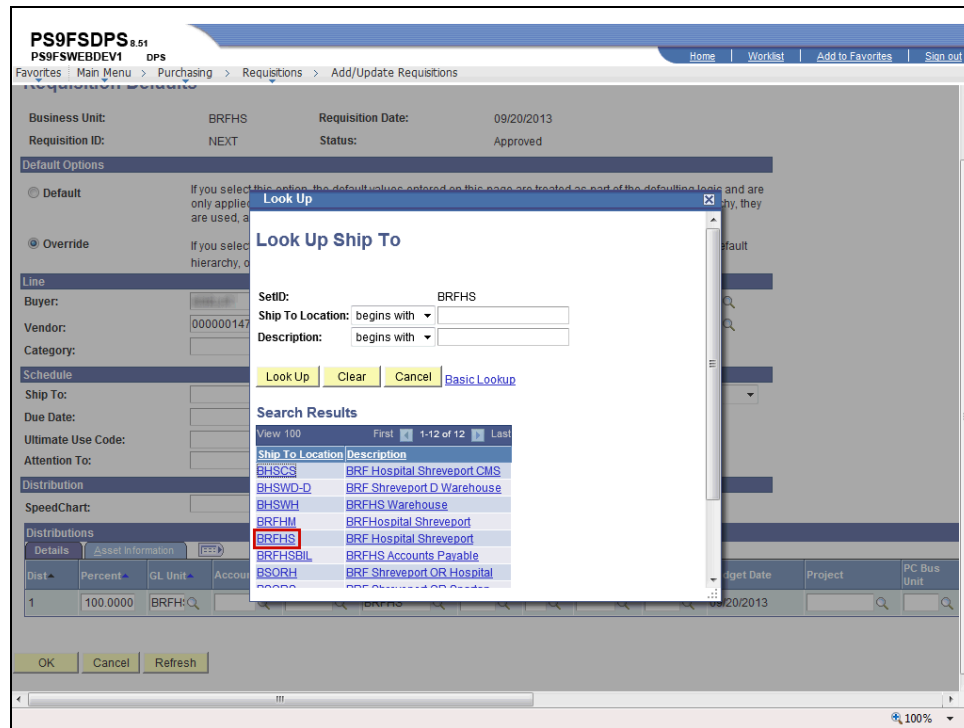
Details | Asset Information | 


Dist	Percent	GL Unit	Account	Dept	Location	III Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1	100.0000	BRFH	<input type="text"/>	<input type="text"/>	BRFHS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	09/20/2013	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

100%

Step	Action
38.	Click the Ship To button. 



Step	Action
39.	Click the BRFHS link. 

PS9FSDPS 8.61
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Requisitions > Add/Update Requisitions

Business Unit: BRFHS Requisition Date: 09/20/2013
Requisition ID: NEXT Status: Approved

Default Options


Default
If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer: Delatte, Adam T. Unit of Measure:
Vendor: 0000001470 Stryker Sales Corp Vendor Location: 0000000018
Category: [Vendor Lookup](#)

Schedule

Ship To: BRFHS BRF Hospital Shreveport *Distribute By: Quantity
Due Date: 
Ultimate Use Code:
Attention To: [One Time Address](#)

Distribution




SpeedChart:

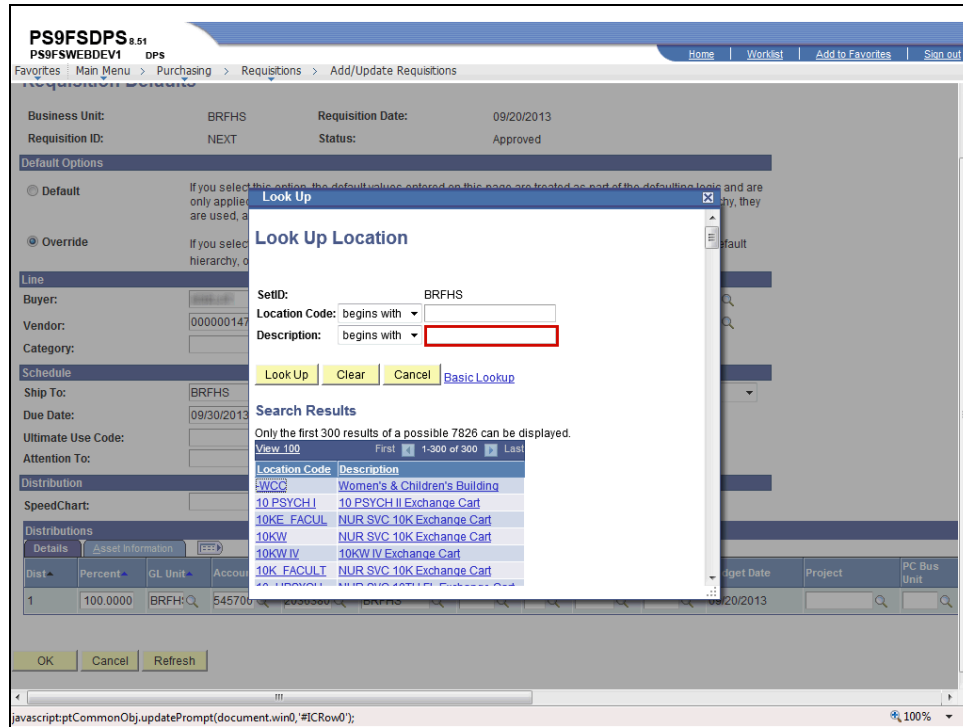
Distributions



Details | Asset Information | [Help](#)

Dist	Percent	GL Unit	Account	Dept	Location	III Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1	100.0000	BRFH	<input type="text"/>	<input type="text"/>	BRFHS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	09/20/2013	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

Step	Action
40.	Click the Due Date button. <i>NOTE: You may also enter the date directly into the Due Date field.</i> 
41.	Click the desired date. 
42.	Enter the desired information into the Account field. Enter " 545700 ".
43.	Enter the desired information into the Dept field. Enter " 2036380 ".
44.	Click the Look up Location button. 



Step	Action
45.	Enter the desired information into the Description field. Enter " NEURO ".
46.	Click the Look Up button. 
47.	Click the N20G0100 link. 

PS9FSDPS 8.61
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing > Requisitions > Add/Update Requisitions

Business Unit: BRFHS Requisition Date: 09/20/2013
 Requisition ID: NEXT Status: Approved

Default Options

Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer: [text] Delatte, Adam T. Unit of Measure: [text]
 Vendor: 0000001470 Stryker Sales Corp Vendor Location: 0000000018
 Category: [text] [Vendor Lookup](#)

Schedule

Ship To: BRFHS BRF Hospital Shreveport *Distribute By: Quantity
 Due Date: 09/30/2013
 Ultimate Use Code: [text]
 Attention To: [text] [One Time Address](#)

Distribution

SpeedChart: [text]

Distributions

Details | Asset Information | [text]

Dist	Percent	GL Unit	Account	Dept	Location	III Unit	Fund	Program	Class	Budget Date	Project	PC Bus Unit
1	100.0000	BRFH	545700	2036380	N20G0100					09/20/2013		

OK Cancel Refresh


Step	Action
48.	Click the OK button.

OK

PS9FSDPS 8.51
PS9FSWEBDEV1 DPS

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions


[New Window](#) | [Help](#) | [Customize Page](#) | 

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit: BRFHS **Requisition Date:** 09/20/2013
Requisition ID: NEXT **Status:** Approved

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
 For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
 Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.
 Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.


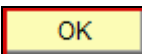
Mark All **Unmark All**

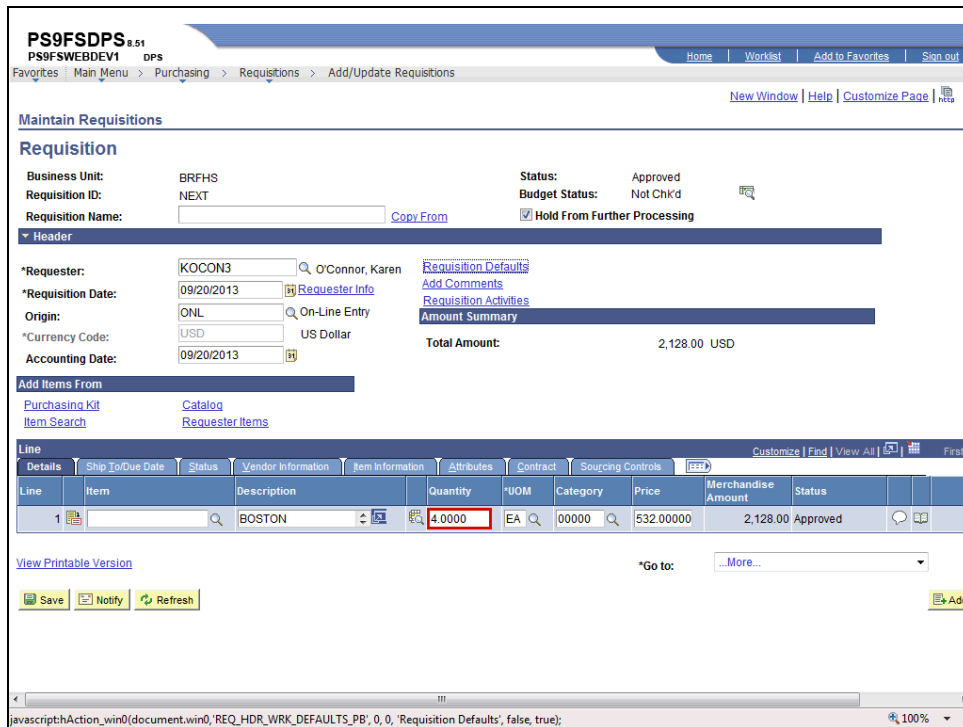
Retrofit Field Selection Customize | Find | View All |  First 1,7 of 11 Last

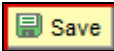

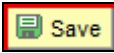
Apply	Field Name	Distrib Line	Field Value	Apply to All Distribs
<input type="checkbox"/>	Buyer			
<input type="checkbox"/>	Vendor		0000001470	
<input type="checkbox"/>	Vendor Location		0000000018	
<input type="checkbox"/>	Ship To		BRFHS	
<input type="checkbox"/>	Due Date		2013-09-30	
<input type="checkbox"/>	Pct	1	100	
<input type="checkbox"/>	GL Unit	1	BRFHS	<input type="checkbox"/>

OK **Cancel** **Refresh**

javascripthAction_win0(document.win0,REQ_PNL5_WRK_MARK_ALL_LINES_FLG',0,0,'Mark All',false,true); 100%

Step	Action
49.	Click the Mark All link. 
50.	Click the OK button. 



Step	Action
51.	Change the Quantity from 4 to 2. Enter the desired information into the Quantity field. Enter "2".
52.	Enter the desired information into the Price field. Enter "550".
53.	Click the Save button. 
54.	A Requisition ID number has been assigned by the system. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned when the PO is generated. <i>NOTE: If this is a Confirmation Purchase Order, the Requisition ID is the PO number.</i>
55.	If you do not intend to add other line items to the requisition and it is ready for approval, you must uncheck the Hold From Further Processing box and save the requisition.
56.	In this exercise, you will not add another line item and the requisition is ready for approval. Click the Hold From Further Processing option. 
57.	Click the Save button. 

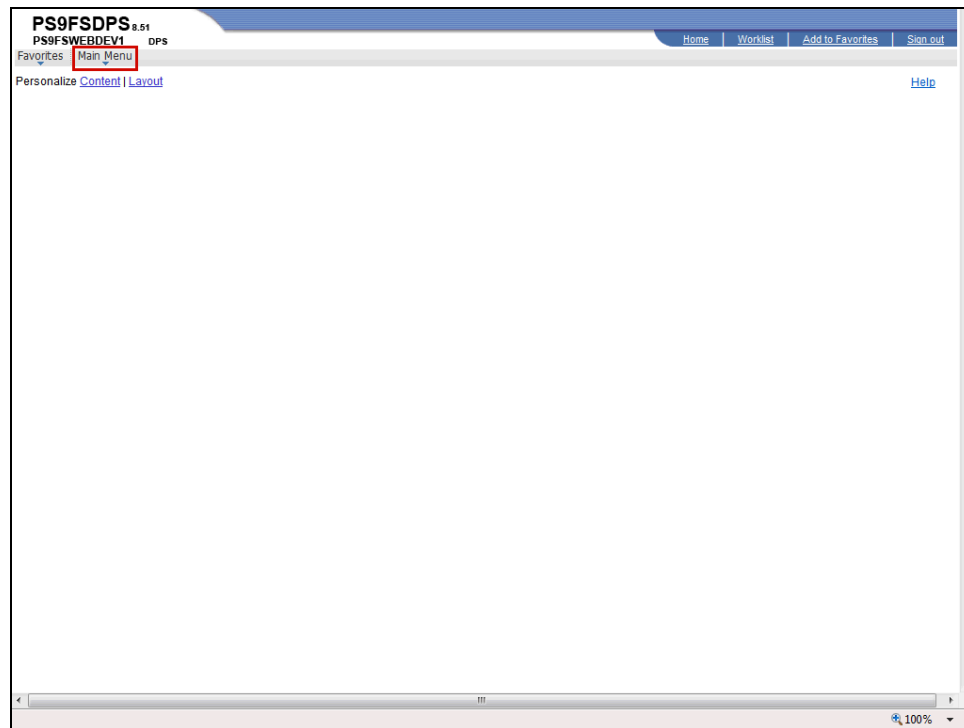
Step	Action
58.	This completes <i>Copy a Requisition</i> . End of Procedure.



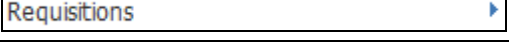
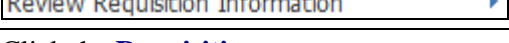
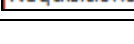
Inquire on Requisition Status

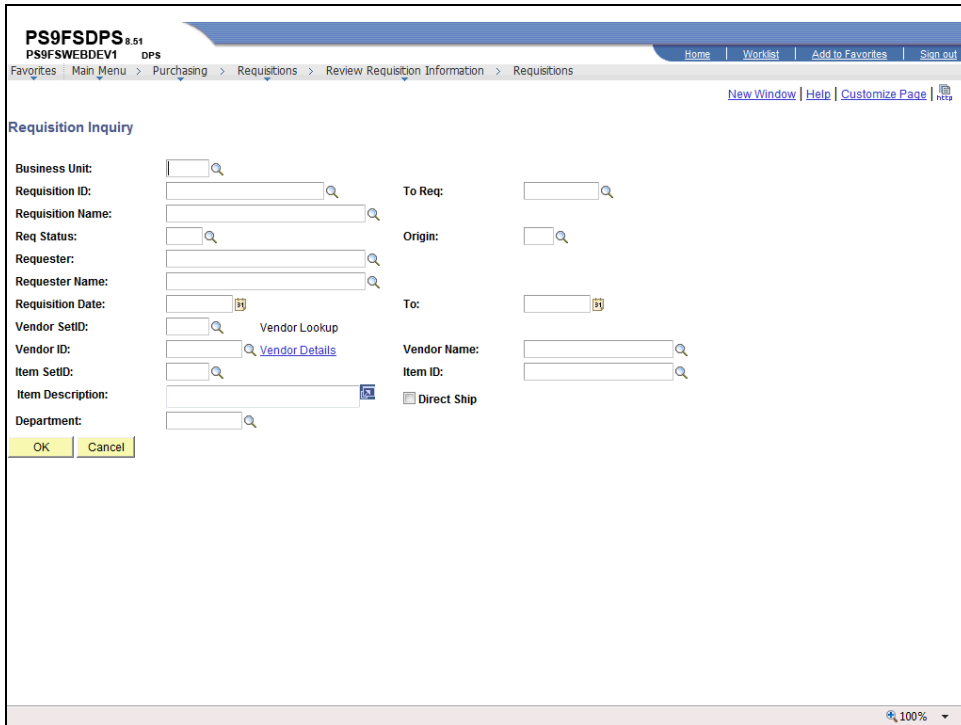
Inquire on a Requisition

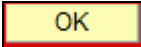
Procedure

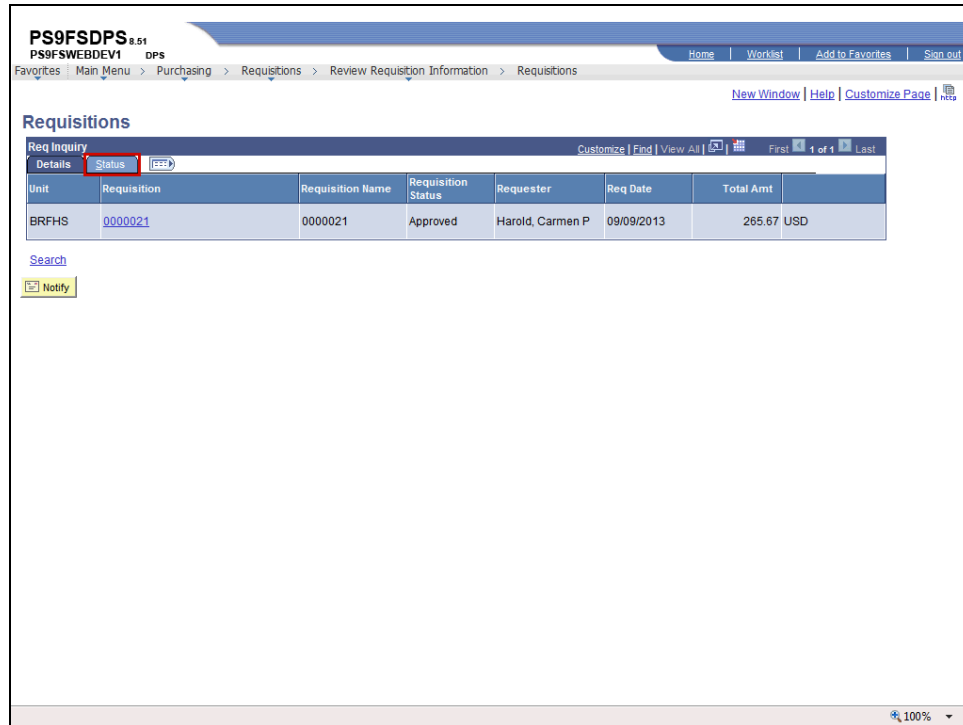
In this topic you will learn how to **Inquire on a Requisition**.





Step	Action
1.	Click the Main Menu button. 
2.	Click the Purchasing menu. 
3.	Click the Requisitions menu. 
4.	Click the Review Requisition Information menu. 
5.	Click the Requisitions menu. 




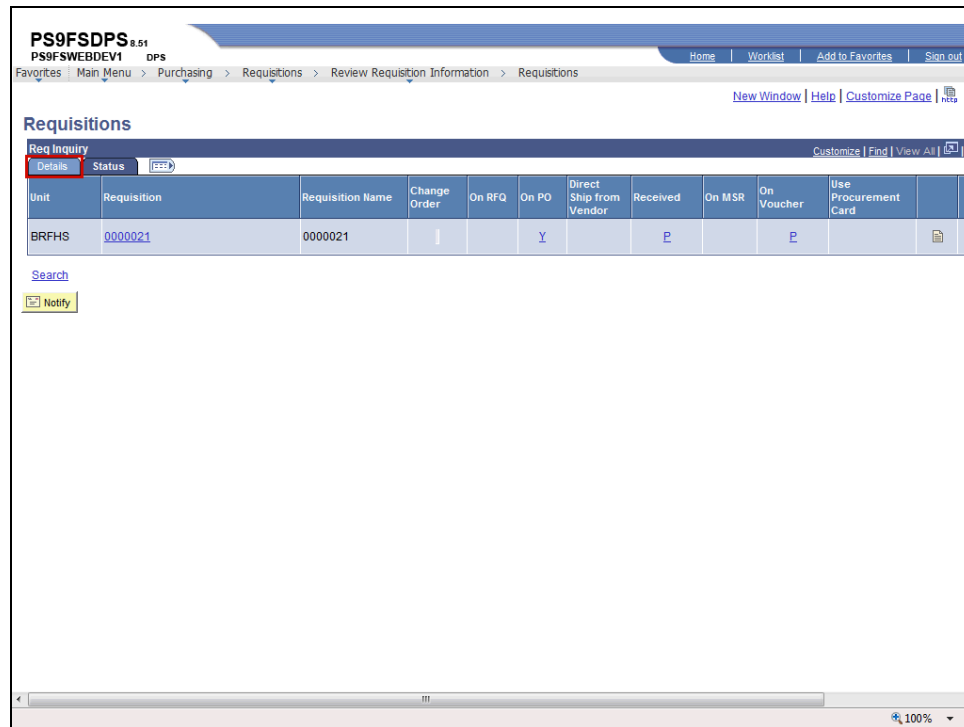
Step	Action
6.	Enter the desired information into the Business Unit field. Enter " BRFHS ".
7.	<p>Search to Inquire on an Existing Requisition</p> <p>You may search to inquire on an existing requisition by entering all or part of one of the following search criteria:</p> <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; or • Requester – to view requisitions associated with a specific requester.
8.	<p>Enter the desired information into the Requisition ID field. Enter "000021".</p> <p><i>NOTE: If you do not know the requisition id, you can search for it using Lookup Requisition ID. Alternatively, you can enter the Requester's User ID into the Requester field, or use Lookup Requester to search for the requester user id.</i></p>
9.	<p>Click the OK button.</p> 





Step	Action
10.	<p>The Requisition inquiry page displays.</p> <p>Click the Status tab.</p> 
11.	<p>The "Y" in the On PO column indicates that the requisition has been sourced into a PO.</p> <p>The "P" in the Received and On Voucher columns indicates receipts and vouchers for the requisition have been posted.</p> <p>NOTE: You can view the PO inquiry page by clicking the "Y" in the On PO column. You can view the Receipt inquiry or the Voucher inquiry page by clicking on the "P" in either the Received or On Voucher column.</p>
12.	<p>Click the Document Status button.</p> <p>This will open a new window.</p> <p>NOTE: See the "Inquire on a Requisition Doc Status" topic for detailed instructions on how to access the Req Doc Status page directly and use the document links and buttons.</p> 



Step	Action
13.	<p>The Document Status page will also display when a "Y" or "P" is clicked on the requisitions inquiry page.</p> <p>Click the Close button.</p> 




Step	Action
14.	Click the Details tab. 
15.	Click the 0000021 link to view the line details page. 
16.	<i>NOTE: You may click the Description link to view additional item description information.</i>
17.	<i>NOTE: From the Line Details page you can click the Line Comments bubble or the Schedule Details button to view additional requisition information.</i>

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PS9FSWEBDEV1 DPS


Home | Worklist | Add to Favorites | Sign out


Favorites | Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions

New Window | Help | Customize Page | 

Line Details

Business Unit: BRFHS Req ID: 0000021
 Requester: Harold, Carmen P
 Requisition Date: 09/09/2013 Merchandise Amount: 265.67 USD
 Req Status: Approved Pre-Encumbrance Balance: 0.00 USD

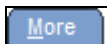
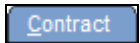


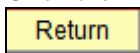
Requisition Details Customize | Find | View All |  Fit

Details | More | Contract | 

Line	Status	Item ID	Description	Vendor ID	Name	Req Qty	UOM	Merchandise Amt	Amount Only
1	Approved	607578	ABBOTT/ROSS 00079-SIMILAC INF2	0000001399	ABBOTT LABORATORIES INC	4.0000	CS	61.20 USD	<input type="checkbox"/>
2	Approved	607576	ABBOTT/ROSS 00180-VOLU-FEED 10	0000001399	ABBOTT LABORATORIES INC	3.0000	CS	123.69 USD	<input type="checkbox"/>
3	Approved	607636	Abbott 62769, Kit Breastfeedin	0000001399	ABBOTT LABORATORIES INC	6.0000	CS	59.22 USD	<input type="checkbox"/>
4	Approved	607584	ABBOTT/ROSS 00081-VOLU-FEED DI	0000001399	ABBOTT LABORATORIES INC	4.0000	CS	21.56 USD	<input type="checkbox"/>

[Return](#)

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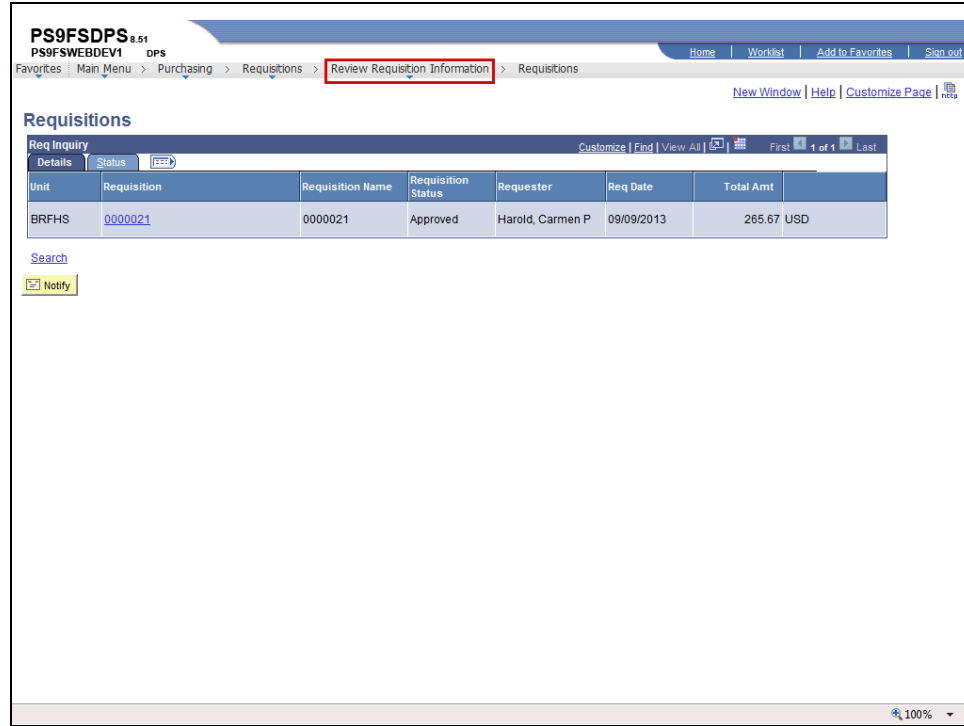
Step	Action
18.	Click the More tab. 
19.	From the More tab you can view Buyer and vendor item information (i.e. Vendor Item ID and Vendor's Catalog).
20.	From the More tab you can also view the Category code and manufacturing information.
21.	Click the Contract tab. 
22.	View the Contract page. Click the Show all columns button. 
23.	The tabs are removed and you can scroll to the right to view the information previously displayed in the tabs. Click the Show tabs button. 
24.	The tabs again display. Click the Return button. 

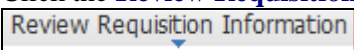
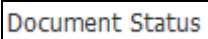
Step	Action
25.	This completes <i>Inquire on a Requisition</i> . End of Procedure.

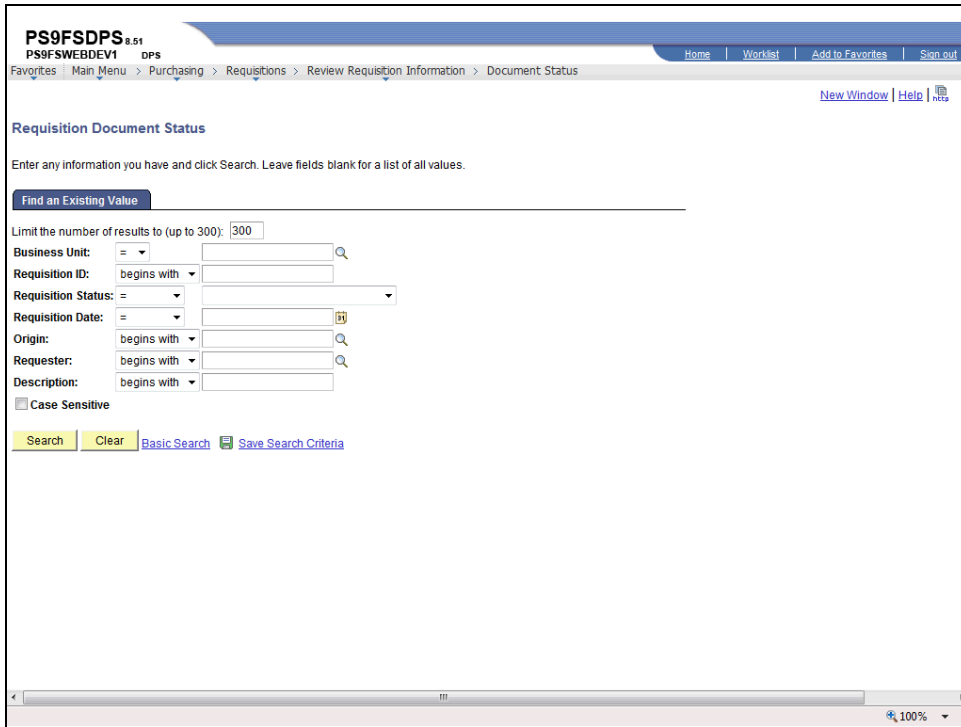
Inquire on the Document Status Page

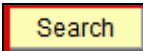
Procedure

In this topic you will learn how to **Inquire on the Document Status Page**.



Step	Action
1.	Click the Review Requisition Information button. 
2.	Click the Document Status menu. 
3.	<p>Inquire on a Requisition Doc Status</p> <p>You can search to inquire on the document status page by entering all or part of one of the following search criteria:</p> <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; or • Requester – to view requisitions associated with a specific requester.




Step	Action
4.	Enter the desired information into the Business Unit field. Enter " BRFHS ".
5.	Enter the desired information into the Requisition ID field. Enter " 0000021 ". <i>NOTE: If you do not know the requisition id, you can search for it using Lookup Requisition ID. Alternatively, you can enter the Requester's User ID into the Requester field, or use Lookup Requester to search for the requester user id.</i>
6.	Click the Search button. 
7.	From the Document Status page for this example, you may view the following pages associated with the requisition: the Requisitions page, the PO Inquiry page, and the Receipts page.

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



Favorites | Main Menu > Purchasing > Requisitions > Review Requisition Information > Document Status

[New Window](#) | [Help](#) | [Customize Page](#) | 

Document Status


Business Unit: BRFHS Req ID: **0000021**
 Document Date: 09/09/2013 Status: Approved
 Currency: USD Document Type: Requisition
 Requester: Harold, Carmen P Merchandise Amt: 265.67
 Budget Status: Valid

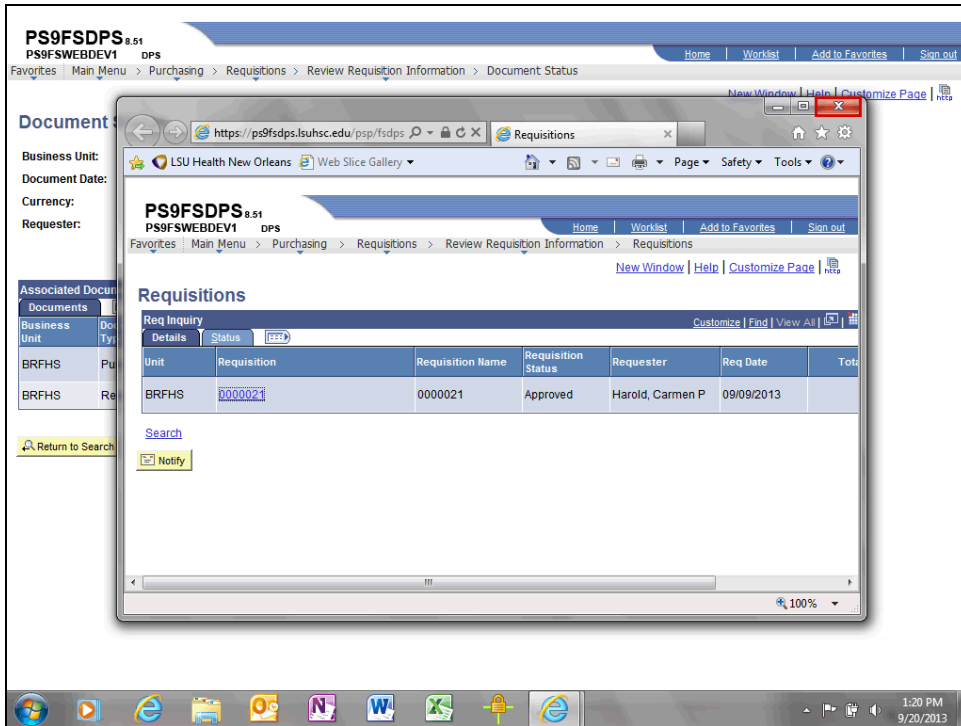
Associated Document Customize | End | View All |  First 1-2 of 2 Last


Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
BRFHS	Purchase Order	00000044	Dispatched	09/09/2013	0000001399 	0000000001	
BRFHS	Receipt	000020	Received	09/09/2013	0000001399 	0000000001	

[Return to Search](#)

javascripthAction_win0(document.win0,'HDR_ID',0,0,'0000021',false,true); 100%

Step	Action
8.	Click the 0000021 link to view the Requisitions page. 



Step	Action
9.	Click the Close button. 

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PS9FSWEBDEV1 DPS

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Favorites | Main Menu > Purchasing > Requisitions > Review Requisition Information > Document Status

[New Window](#) | [Help](#) | [Customize Page](#) |

Document Status

Business Unit: BRFHS **Req ID:** [0000021](#)
Document Date: 09/09/2013 **Status:** Approved
Currency: USD **Document Type:** Requisition
Requester: Harold, Carmen P **Merchandise Amt:** 265.67
Budget Status: Valid

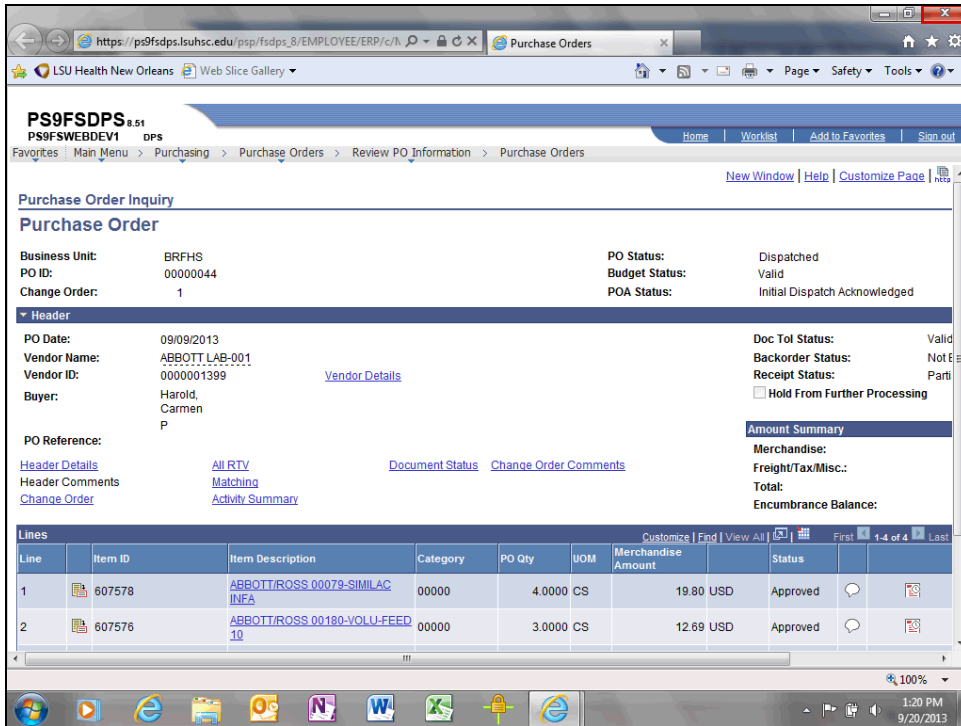
Associated Document [Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
BRFHS	Purchase Order	00000044	Dispatched	09/09/2013	0000001399	0000000001	
BRFHS	Receipt	000020	Received	09/09/2013	0000001399	0000000001	

[Return to Search](#)

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Step	Action
10.	Click the 00000044 link to view the PO Inquiry page. 00000044



Purchase Order Inquiry

Purchase Order

Business Unit: BRFHS
 PO ID: 00000044
 Change Order: 1

PO Status: Dispatched
 Budget Status: Valid
 POA Status: Initial Dispatch Acknowledged

Header


PO Date: 09/09/2013
 Vendor Name: ABBOTT LAB-001
 Vendor ID: 0000001399
 Buyer: Harold, Carmen
 PO Reference: P

Doc Tol Status: Valid
 Backorder Status: Not E
 Receipt Status: Parti
 Hold From Further Processing

Amount Summary

Merchandise:
 Freight/Tax/Misc.:
 Total:
 Encumbrance Balance:


Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1	607578	ABBOTT/ROSS 00079-SIMILAC INFA	00000	4.0000	CS	19.80 USD	Approved
2	607576	ABBOTT/ROSS 00180-VOLU-FEED 10	00000	3.0000	CS	12.69 USD	Approved

Step	Action
11.	Click the Close button. 

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PS9FSWEBDEV1 DPS


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



Favorites | Main Menu > Purchasing > Requisitions > Review Requisition Information > Document Status

[New Window](#) | [Help](#) | [Customize Page](#) | 

Document Status

Business Unit: BRFHS Req ID: [0000021](#)
 Document Date: 09/09/2013 Status: Approved
 Currency: USD Document Type: Requisition
 Requester: Harold, Carmen P Merchandise Amt: 265.67
 Budget Status: Valid

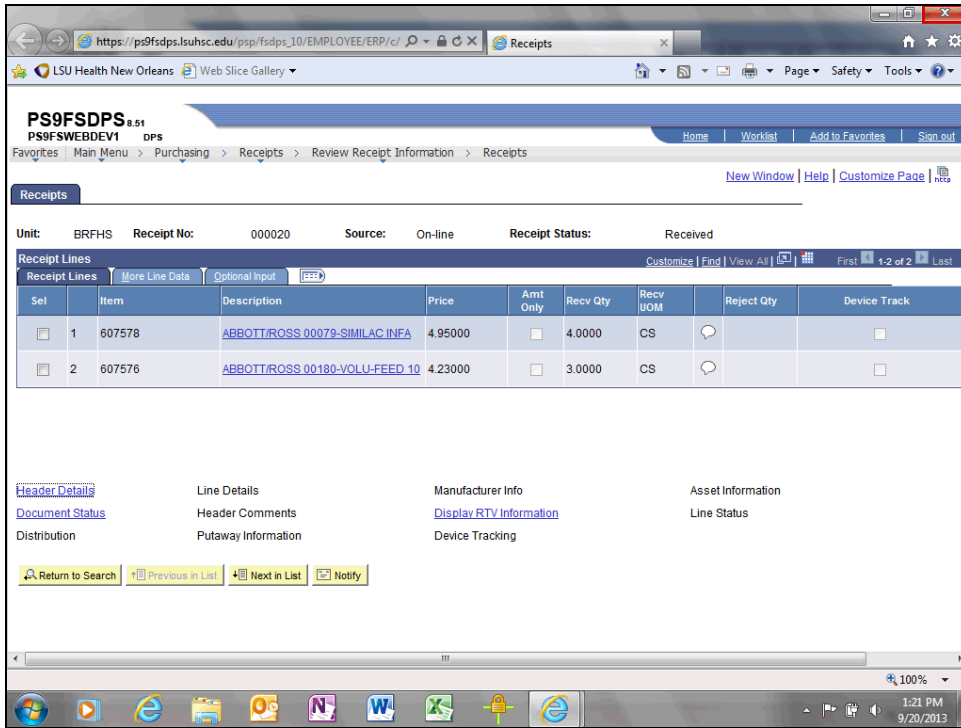
Associated Document Customize | End | View All |  First 1-2 of 2 Last


Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
BRFHS	Purchase Order	00000044	Dispatched	09/09/2013	0000001399 	0000000001	
BRFHS	Receipt	000020	Received	09/09/2013	0000001399 	0000000001	

[Return to Search](#)

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Step	Action
12.	Click the 000020 link to view the Receipt inquiry page. 000020



Step	Action
13.	Click the Close button. 
14.	This completes <i>Inquire on the Document Status Page</i> . End of Procedure.