Managing eProcurement Requisitions

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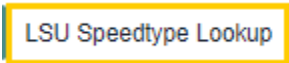
In this topic you will learn how to use **SpeedCharts** to simplify data entry.

Step	Action
1.	*NOTE: Speedcharts are referred to as Accounting Tags in eProcurement. However, the process for looking up Speedchart (Accounting Tag) information remains the same.*
2.	A **SpeedChart** is a shortcut the users can enter to automatically fill in the individual ChartField values on the distribution line. The use of **SpeedCharts** can greatly increase data entry efficiency by reducing the number of keystrokes required to enter frequently used combinations of Chartfield values and by reducing keystroke errors.
3.	*Please review the following definitions on SpeedChart, ChartField and ChartString used in this training document.* •**SpeedChart** – is a combination of ChartFields, excluding the Account Code. The Account Code is not part of the SpeedChart values and needs to be entered on the distribution line to complete the ChartString. It is also known as **SpeedType.** •**ChartField** – In Peoplesoft, the Chart of Accounts is comprised of information fields that provide the basic structure to segregate and categorize transactional and budget data. Each informational field is called a **CHARTFIELD.** •**ChartString** – is combining a series of chartfield values into one string. SpeedCharts are utilized on the Requisition Defaults and line distribution page: •**Single SpeedCharts** are accessed on the Requisition default page and the Distribution line. •**Multiple SpeedCharts** are accessed on the Distribution lines.
4.	**Lookup SpeedChart Information:** The SpeedChart information can be found in the SpeedType lookup. Click the **NavBar** button. ⊘

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Step	Action
5.	Click the **Menu** button.
6.	Click the **Down** scrollbar.
7.	Click the **LSU Processes** link.
8.	Click the **LSU SpeedType Lookup** link.

Step	Action
9.	*NOTE: In this example we are searching for all the SpeedCharts for a specific Department.*
	Enter your Business Unit in the **SetID** field and the **Department ID** you wish to search for.
	Click the **Search** button.
	Search

Step	Action
10.	Select SpeedType Key for the department you wish to review.
	Click the **SpeedType Key** link.
	281670

Step	Action
11.	**The SpeedChart information is displayed.** *NOTE: If you want to use this SpeedChart when creating your information, please make a note of the SpeedType Key to enter in the SpeedChart search field.* *NOTE: Only SpeedChart that begin with a numeric value can be used when creating the Requisitions. Speed Charts that begin with a "G" or "R" cannot be used.* Note the **LSU Speedtype** field value. Press [Enter] to **continue**. 2673001001
12.	**Single SpeedChart** The Single SpeedChart field is located on the Requisition Defaults page above the distribution line. The SpeedChart always overwrites any existing Chartfield values entered on the requisition Distributions line. You will need to enter the SpeedChart before you input the Account Code chartfield value on the Distributions line.
13.	*NOTE: If you know the SpeedChart you want to use you can enter the complete SpeedChart Key into the SpeedChart field. Or you can enter part of the SpeedChart Key, click the lookup icon and select a SpeedChart from the list.*

Step	Action
14.	Enter the desired information into the **SpeedChart** field. Enter "**2673%**".
15.	Click the **SpeedChart Look up** button.
16.	Click the **2673001001** link.
17.	The Chartfield values are filled in as indicated in the screenshot. Please enter the account number to complete the ChartString.
18.	*NOTE: If you cannot find a SpeedChart that contains the values for which the item(s) is being charged, you can manually enter the ChartString values on the distribution line.* Click in the **Account** button.
19.	If you want to split the charges between multiple ChartStrings on the Requisition Default page, you can add another distribution line by clicking on the Add Multiple New Rows button (+) located at the end of the distribution line. *NOTE: You cannot select a SpeedChart for the second distribution line; doing so will overwrite the ChartField values on the <u>first distribution line</u>.* Click **OK** to continue.

Step	Action
20.	The new row will display the values from distribution line 1. Update the ChartString values on line two to charge to the correct ChartString, and apply the percentage of distribution to each line. *NOTE: If there are multiple items being ordered and charged to different ChartStrings, you can choose to enter the ChartString on each line instead of on the Requisition Defaults.*
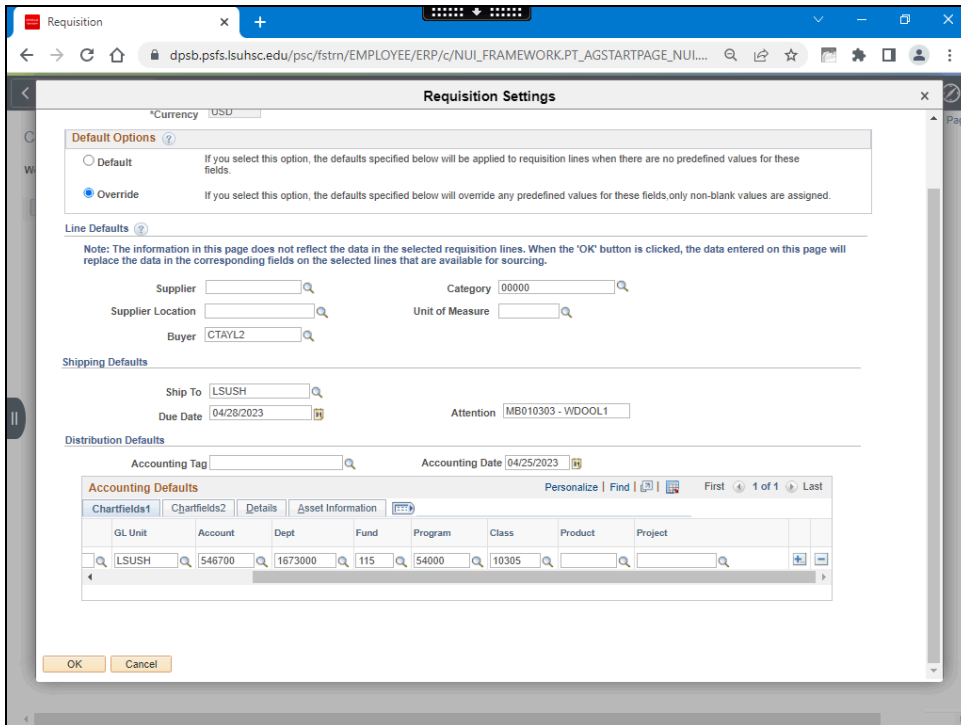
Step	Action
21.	This completes the **SpeedCharts** section. **End of Procedure.**
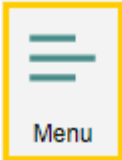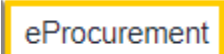
Create a Punchout Requisition

Procedure

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

A **Web Punchout** is a method for requesters to buy from a supplier's website from within the requester's own procurement system.

Step	Action
1.	*NOTE: eProcurement is the new requisition module for LSUSH. The module provides electronic commerce transactions with certain vendors by web punchout to their catalog, returning the request to the PeopleSoft Financials application, then submitting the order to the vendor. All other requisitions may be created through the Special Requests feature.* Click the **NavBar** button.
2.	Click the **Menu** link.
3.	Scroll the **eProcurement** scrollbar with the mouse wheel.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Requisition** link. Requisition
6.	There are **three (3) steps** to creating a Punchout Requisition: **1.** Enter Requisition Settings **2.** Enter punchout line items and checkout **3.** Review, Save and Print the punchout requisition *NOTE: Changing the order of these steps may cause default errors which will result in the re-entering of the requisition by the requester.*
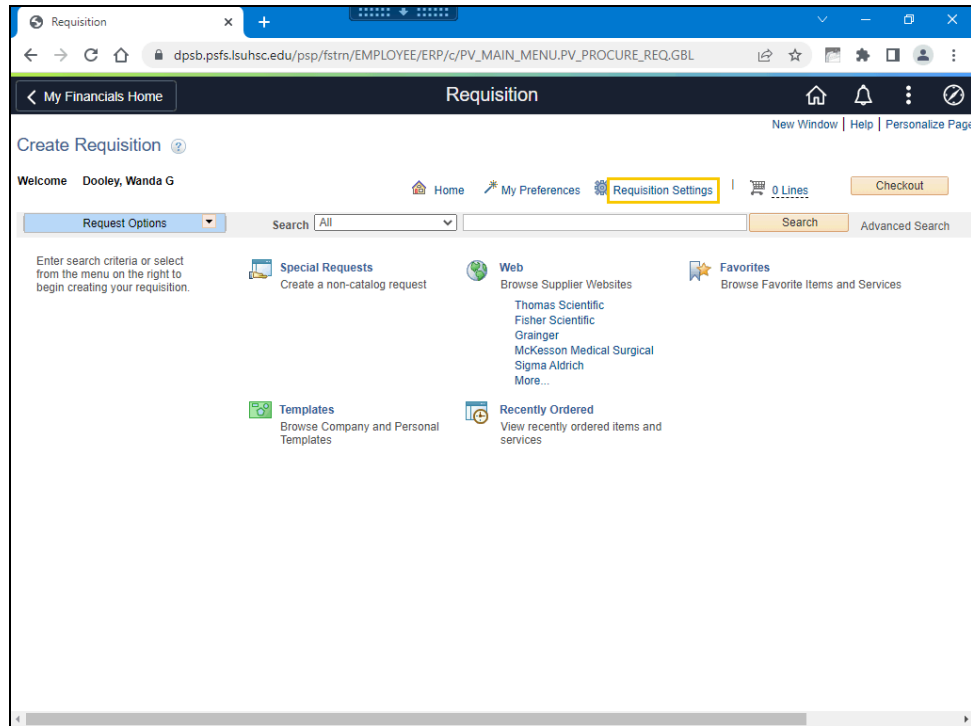
Step	Action
7.	**Step 1: Enter Requisition Settings**
	The Requisition Settings are used to set the default values for the requisition.
	Click the **Requisition Settings** link.
	Requisition Settings

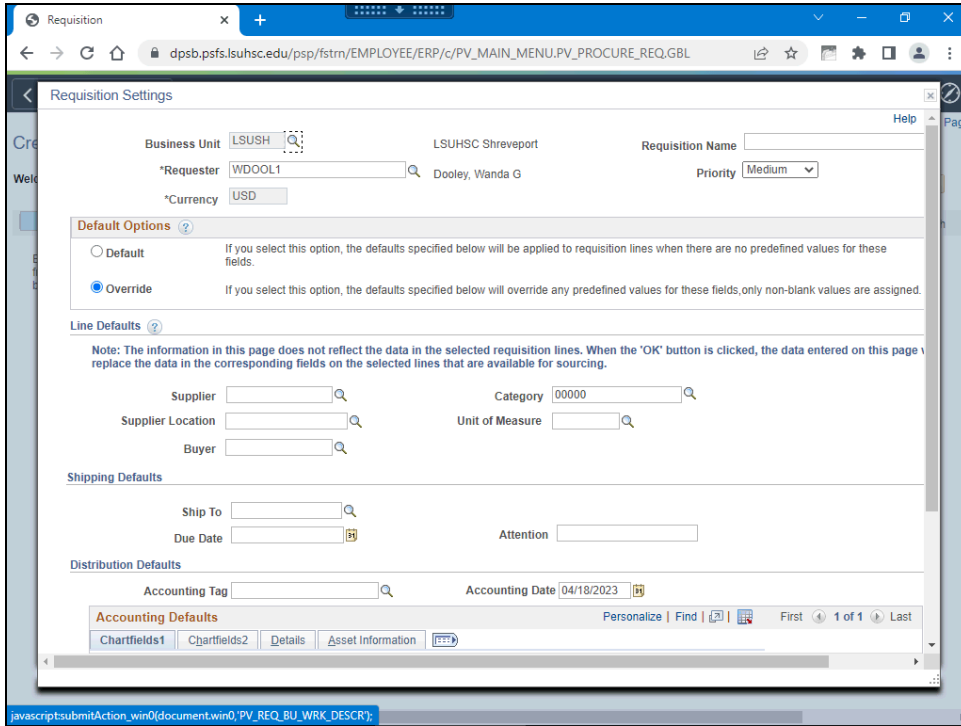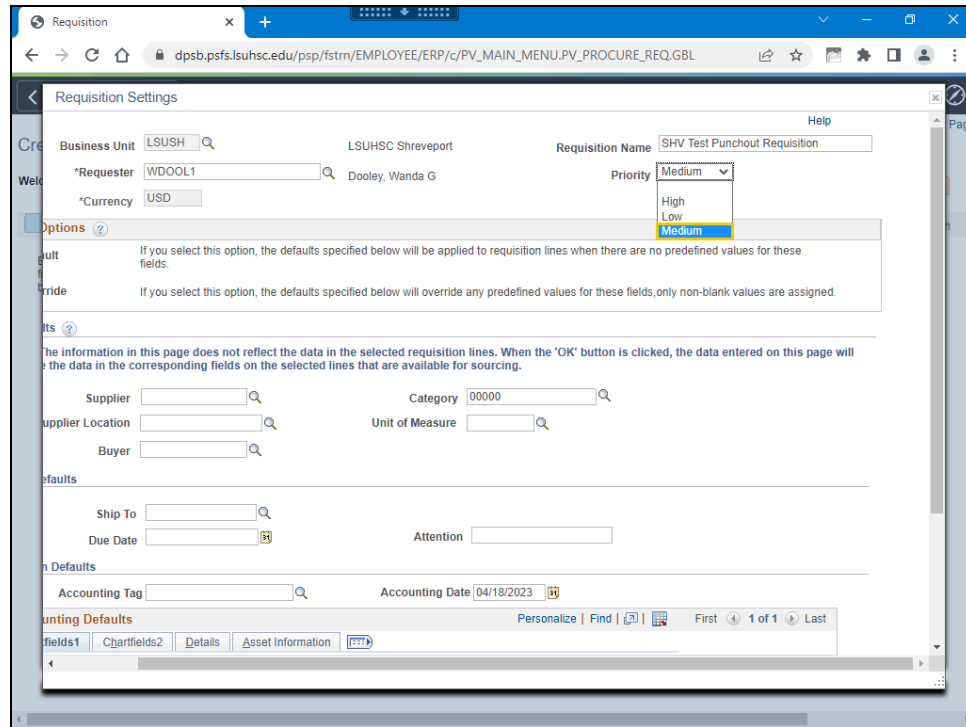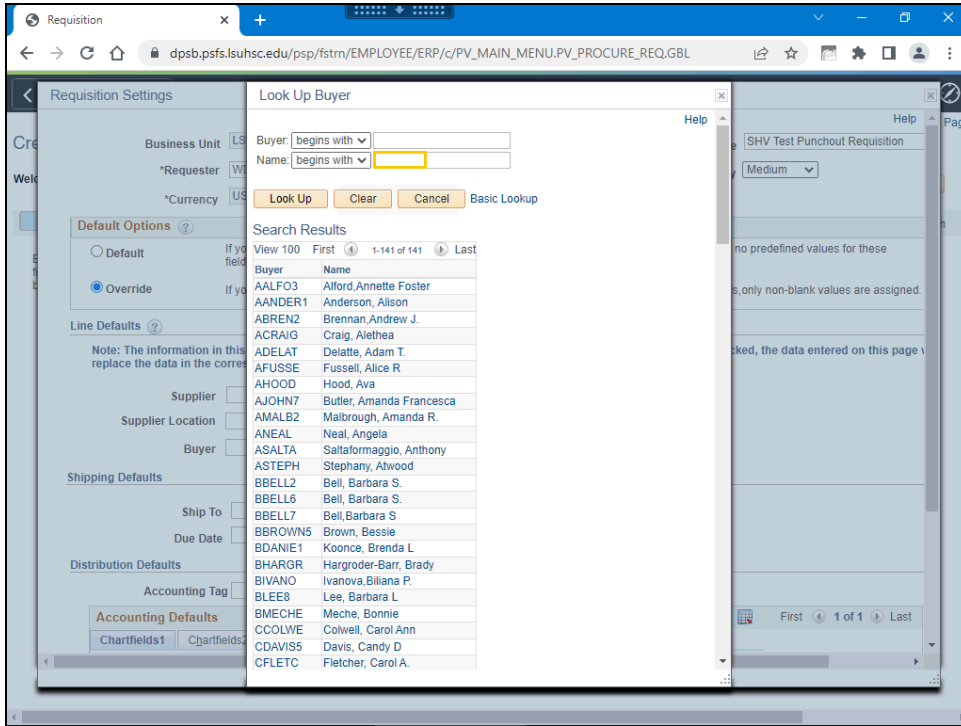| Step	Action
8.	**The Requisition Settings page will display.** The **Requisition Settings** page allows users to enter supplier, shipping, charstring, etc., information on one page rather than for each line item of the requisition. Fields such as the **Business Unit**, **Requester**, **Currency**, and **Location** information should default from your profile. Any entries or changes made on the Requisition Settings page automatically default for all Line Items if made prior to adding any lines to the requisition.
9.	The top section of the **Requisition Settings** page allows the user to enter a *Requisition Name*, change the priority, as well as change the requester if entering the request for another user *(i.e., a Department Approver can change the Requester to any Requester that they approve. Buyers can do the same for all requesters)*. Enter the desired information into the **Requisition Name** field. Enter "**SHV Test Punchout Requisition**".
10.	Requisitions **do not** have to be approved in any particular order. However, you may click the Priority drop-down arrow next to the requisition links to make a notation of the priority order in which you wish the Approver to approve the requisitions in his/her Worklist. *NOTE: This does not reorder the requisitions on the Worklist.* Click the down arrow to the right of the **Priority** field.

Step	Action
11.	*NOTE: The priority could be the importance of the requisition or the expected turnaround time. In the Worklist, the priority of the requisition is displayed and can be sorted by priority by clicking on the Priority column header.* **Low** - Turnaround time is not a priority. **Medium** - The default value for all requisitions, the expectation for approval is within a few days. **High** - Very important, approval is expected within a day. For example, an emergency requisition needed to be ordered and paid for quickly. Choose the desired **Priority**. Medium
12.	Under the **Line Defaults** section, *Buyer* is a required field. If you know the Buyer's UserID, you may enter directly into the field, or search for it using the Look up Buyer (magnifying glass) to the right of the Buyer field. Click the **Look up Buyer** button.

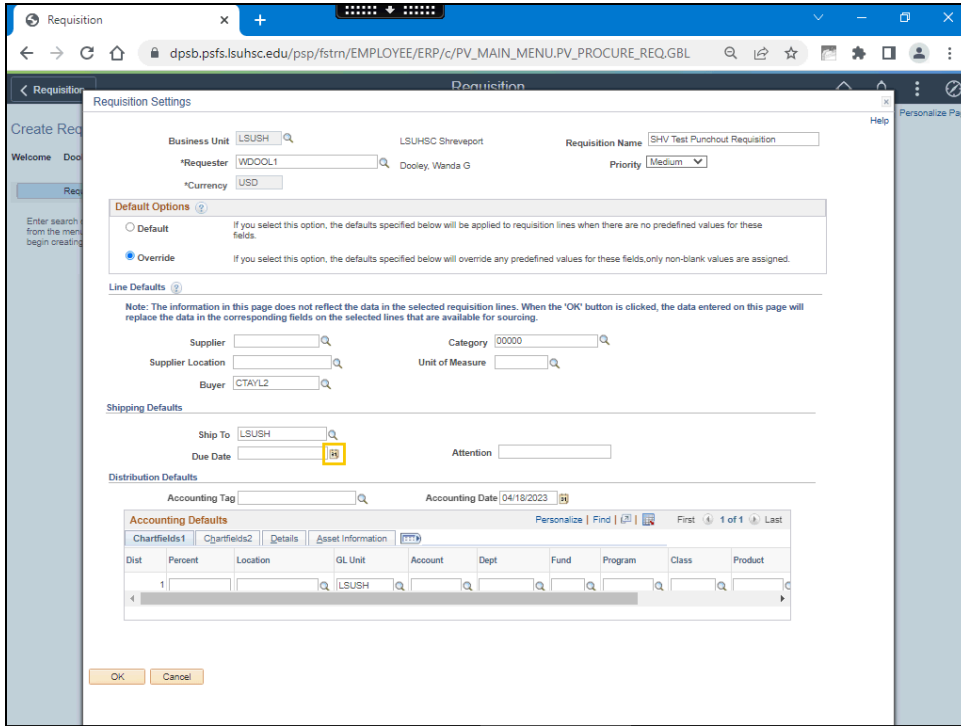| Step	Action
13.	Enter the desired information into the **Name** field. Enter "**COX**". *NOTE: If you enter the full name, the name must be entered in proper PeopleSoft format (i.e., last name,first name).*
14.	Click the **Look Up** button.
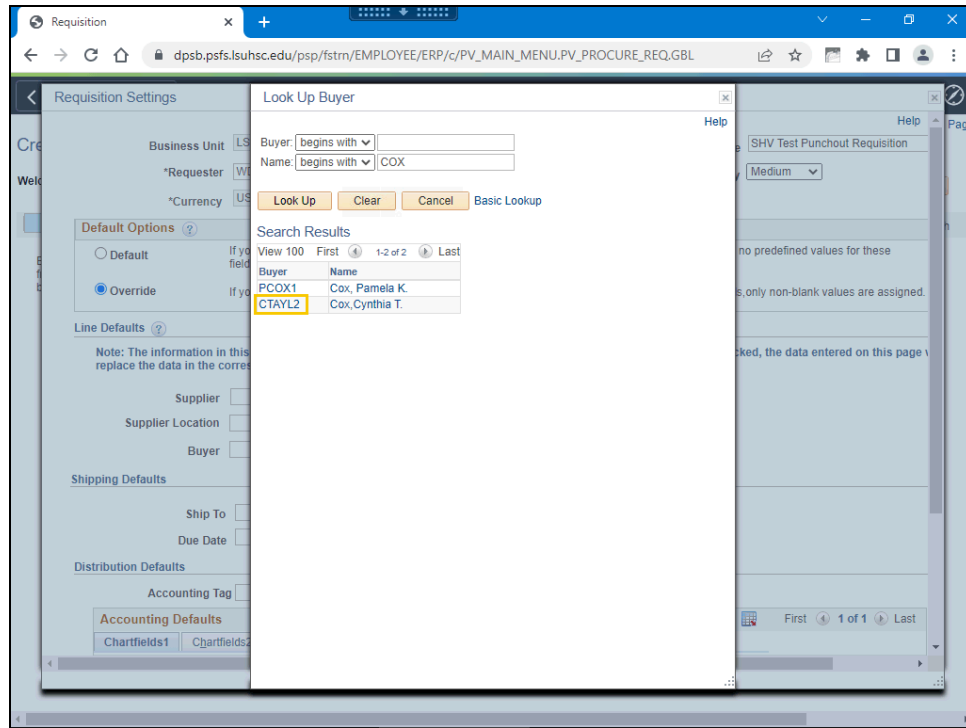
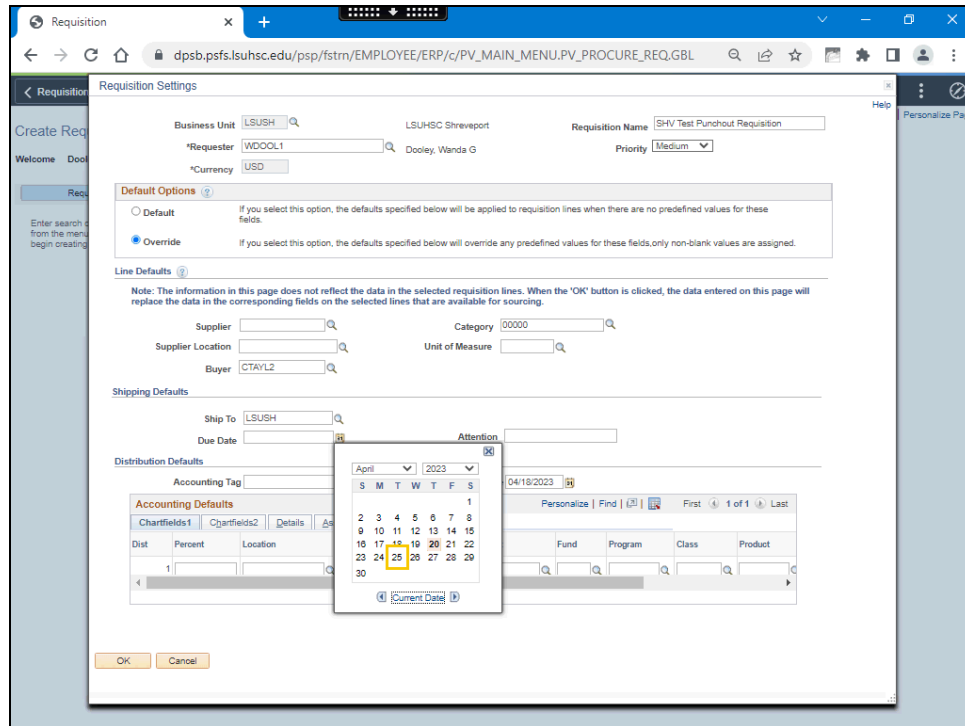| Step	Action
15.	A name or list of names will display in the Search Results area. Click the **CTAYL2** link. CTAYL2

Step	Action
16.	The **Due Date** is the date you expect to receive the goods from the Vendor.

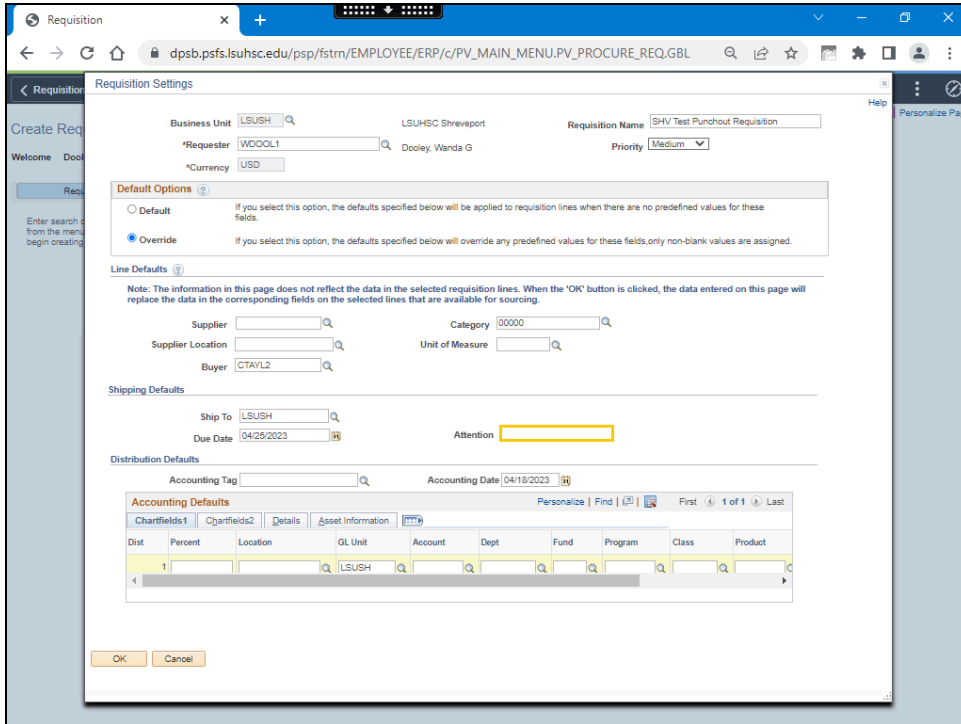Under Shipping Defaults section, click the **Due Date** button.

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Step	Action
17.	Choose a date. For this example, click the October **26**, 2021 date.

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Step	Action
18.	In the **Attention** field, enter the location and user ID/name of the person to whom the delivery will be made. Enter the desired information into the **Attention** field. Enter "**MB010303 - WDOOL1**".
19.	In the **Distribution Defaults** section, the *Accounting Tag* is the same as the Speedtype. The chartstring information in the *Accounting Defaults* section may be changed by selecting an Accounting Tag or by manually changing each of the values in the Accounting Defaults section. Entries or changes made on the **Requisition Settings** page, prior to selecting any requisition lines will carry forward to all lines.
20.	The **Accounting Date** defaults to the current date. When creating requisitions for the upcoming fiscal year at year-end, this field may be changed as needed.
21.	**Location** **LSUSH** uses an 8-10 alphanumeric code, so the default will be changed for all LSUSH requisitions. Each department has an assigned code. Below are examples of two LSUSH Location codes: **1.** Surgery Department - MB010303: MB designates Medical 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

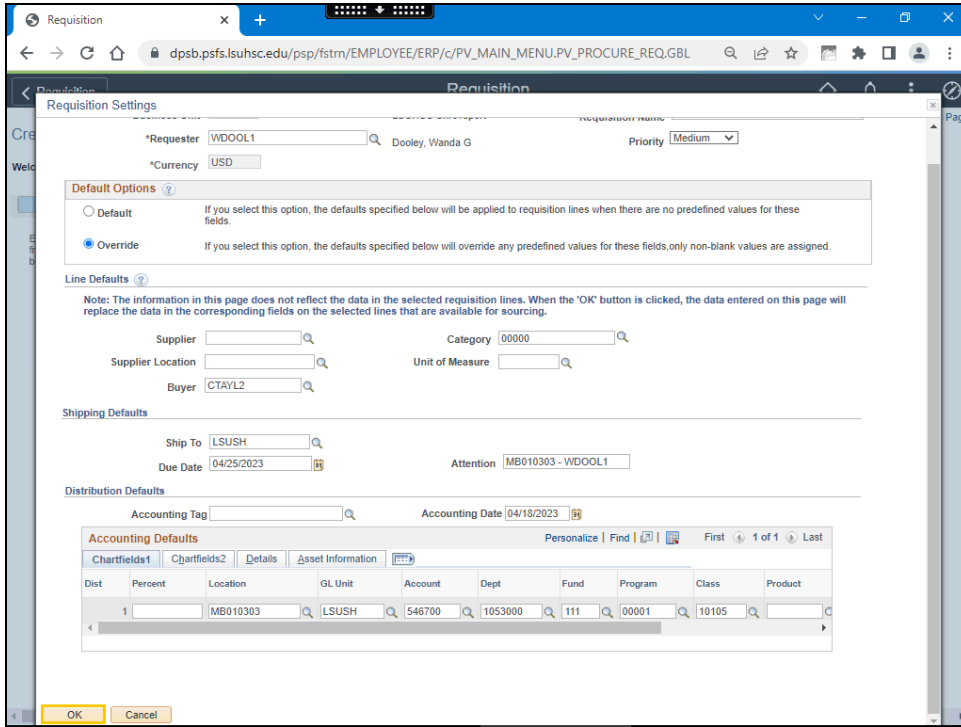| Step	Action
22.	The **Location** entered in the **Accounting Defaults** indicates where the delivery will be made. If the Location does not default it may be entered, or you may use the **Look Up Location** button to the right of the **Location** field.
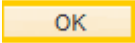
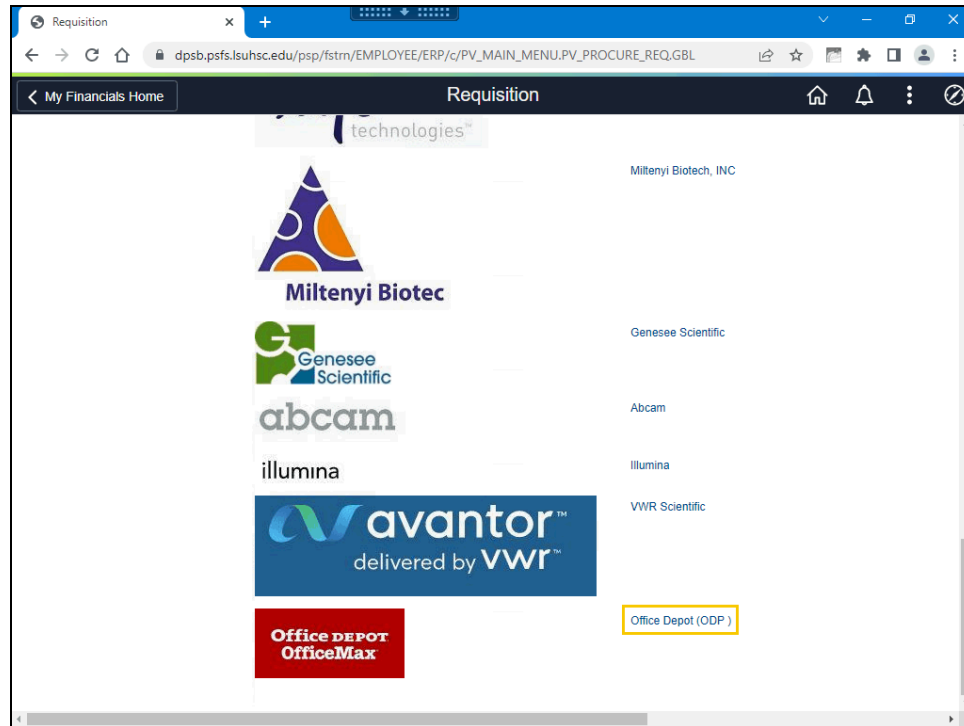| Step	Action
23.	The **Account** field is typically blank on the Requisition Settings page. Users may enter the **Account** prior to selecting any requisition lines and the **Account** number will be defaulted for each line item added to the requisition. In this example, the **Account Code** for *Office Supplies, General* is used. Enter the desired information into the **Account** field. Enter "**546700**".
24.	The **Dept.** will be the department number to which the items will charged. Enter the desired information into the **Dept.** field. Enter "**1053000**".
25.	The **Fund** Code identifies the funding source for the item(s) being ordered. If the item(s) involves a Project/Grant, you will need to enter the Fund Code associated with the specified Project/Grant (i.e., 113,115,116, etc.) Enter the desired information into the **Fund** field. Enter "**111**".
26.	Enter the desired information into the **Program** field. Enter "**00001**".
27.	Enter the desired information into the **Class** field. Enter "**10105**".

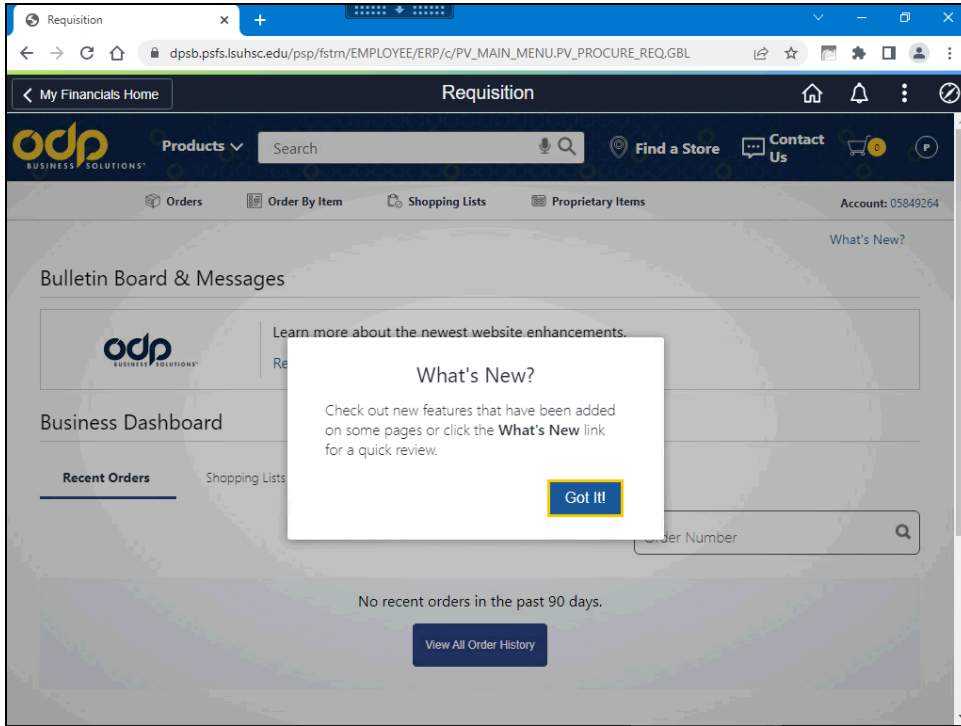| Step	Action
28.	Click the **OK** button. *This completes Step 1: Enter Requisition Settings.* OK
29.	**Step 2: Enter punchout line items and checkout** The Supplier Punchout catalogs are available through the **Web** section of the page. Select the link for the vendor if it is displayed or select **More...** Click the **More...** link. More...
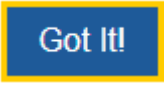
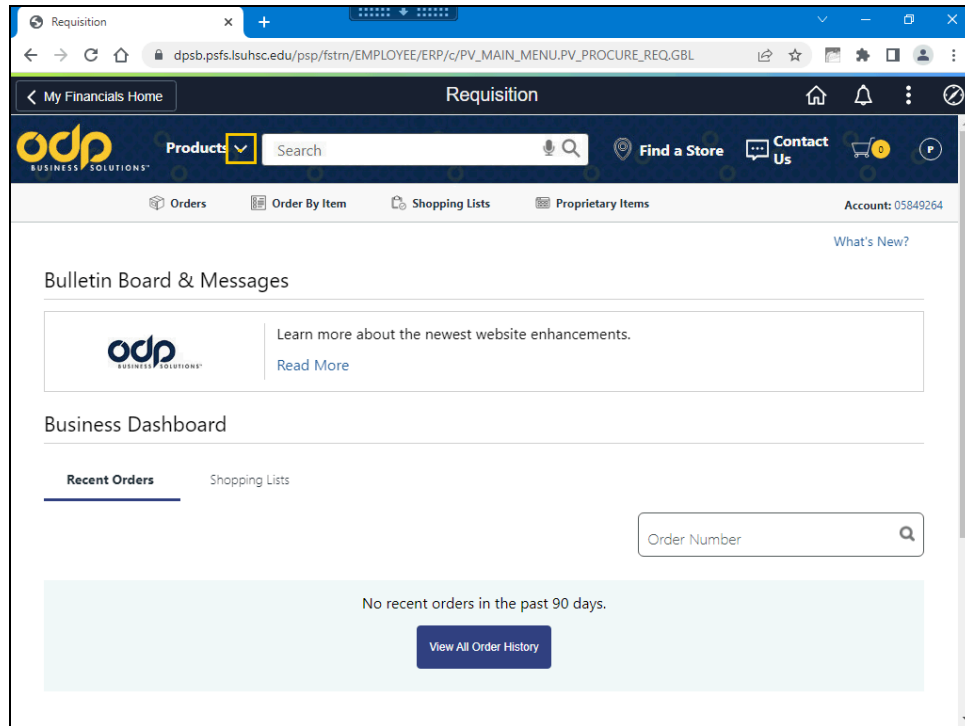| Step	Action
30.	The page displays the supplier logos and a link. Select the link for the desired vendor.
	The system processes the request and the ODP Business Solutions (Office Depot) punchout catalog will load to the screen for display.
	NOTE: Each of the supplier punchout catalog websites will have a different look and feel. This is because you are on the supplier's site, <u>not</u> on the LSU Health PeopleSoft website. For this example, the ODP Business Solutions (Office Depot) punchout catalog is used. Other supplier catalogs will look and function differently, should you need any assistance on a supplier's punchout website, please contact your Buyer.
	Click the **Office Depot (ODP)** link.
	Office Depot (ODP)

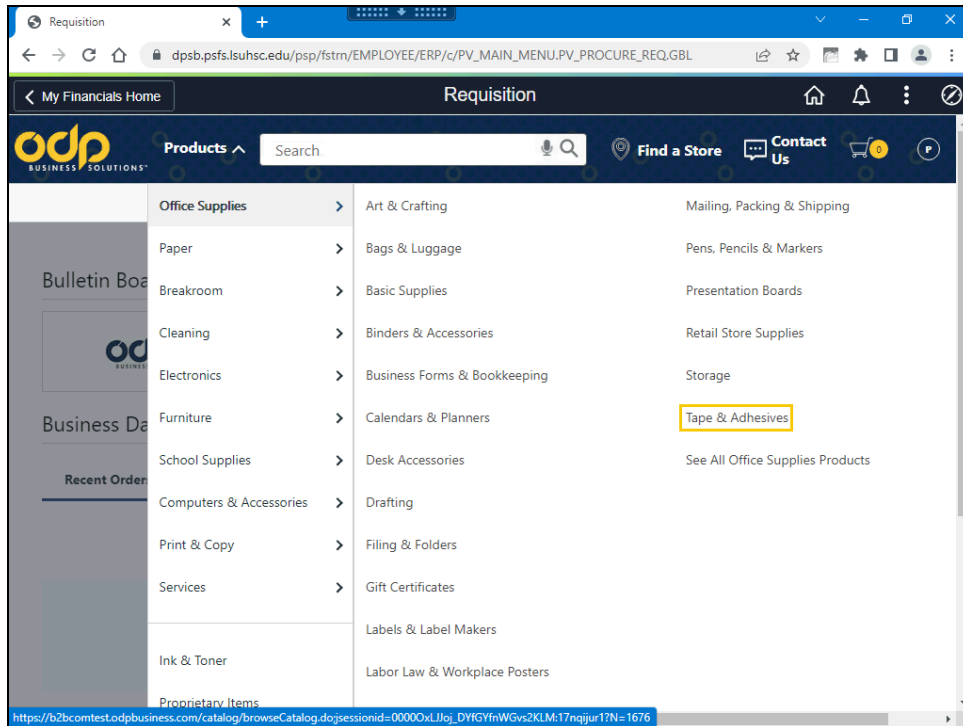| Step	Action
31.	Some vendors, like Office Depot will include tips about new features or items. In this case simply press the **Got It!** button to move on. Click the **Got It!** button.

Step	Action
32.	Click the **Products** arrow. *NOTE: Depending on the version you are using; your ODP Business Solutions (Office Depot) screen may differ slightly from the screen you see here. You may have to Click Menu, then click Products.*

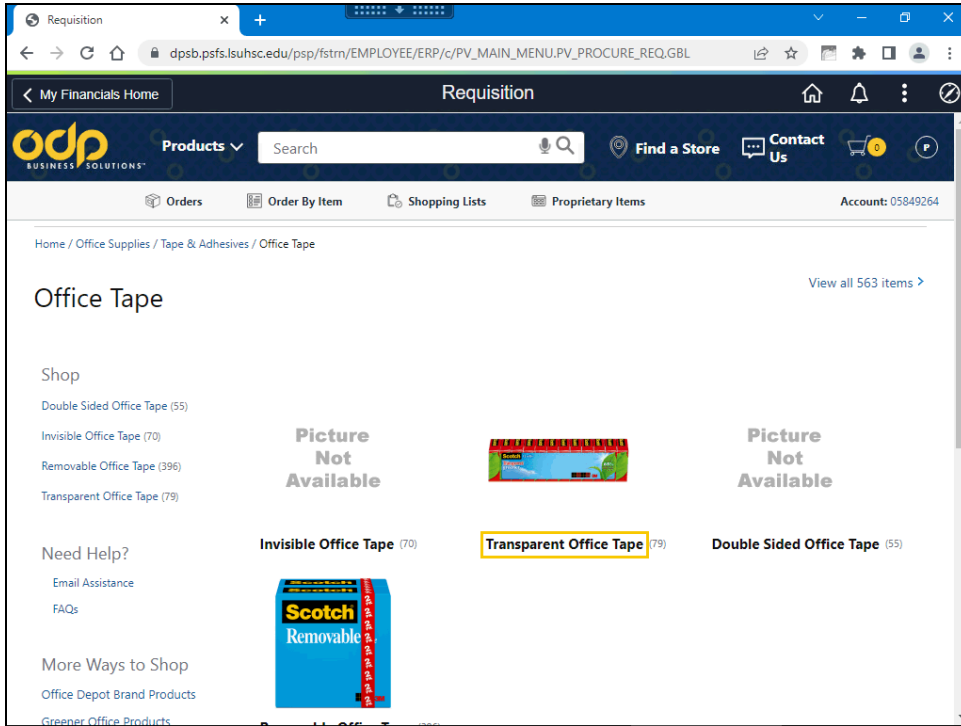| Step	Action
33.	Hover over the **Office Supplies** menu option to display the office supply options. Click the **Tape & Adhesives** link.
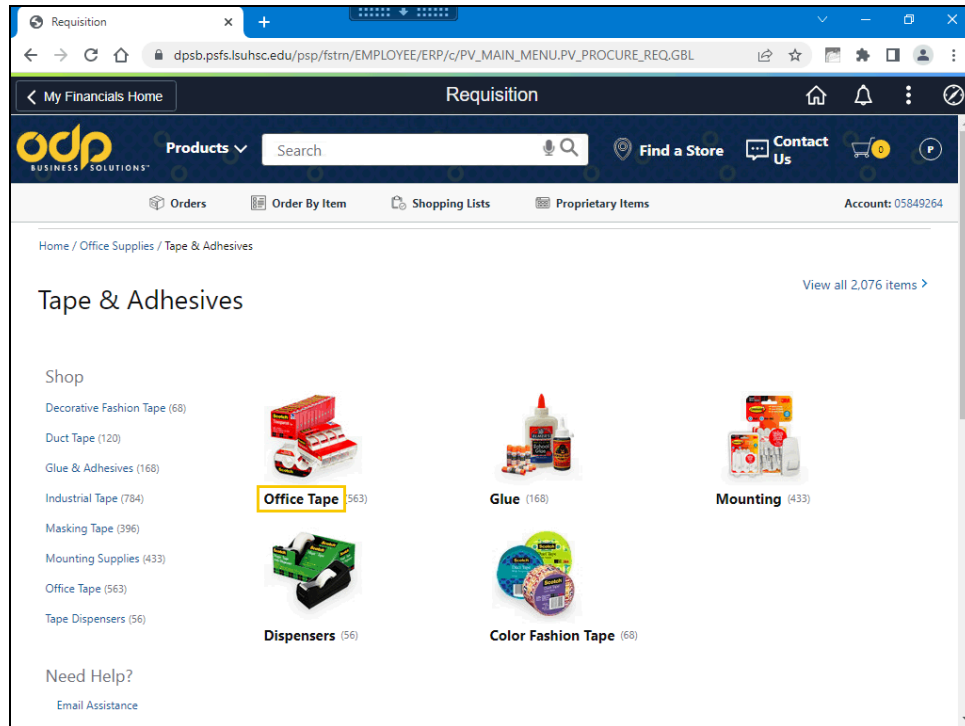
Step	Action
34.	You can continue to narrow down the search by category or select one of the links on the screen.
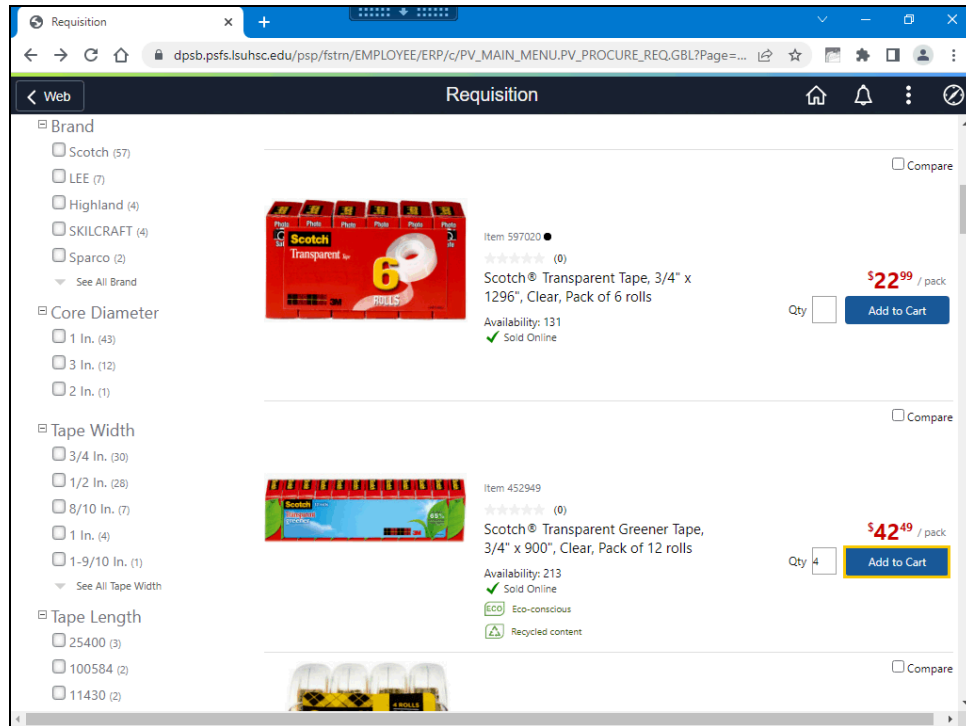
Click the **Office Tape** link.

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Step	Action
35.	You can continue to narrow down the search by category or select one of the links on the screen. Click the **Transparent Office Tape** link. **Transparent Office Tape**
36.	The user can filter further or scroll through the list to select the desired product. In this example, the first product, *Scotch Transparent Greener Tape, Pack of 12* will be selected.
37.	Enter the desired information into the **Qty** field. Enter "**4**".
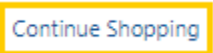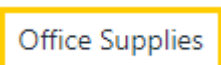
Step	Action
38.	Click the **Add to Cart** button.

Step	Action
39.	Each time you add an item, you will be brought to the cart for review. *NOTE: The shopping cart icon at the top right includes a red dot. This indicates that there are goods in the cart and the dollar amount displays.* Below the item added to the cart you will find the link to **Continue Shopping** at the bottom left. At the right are the buttons to take you to the **SHOPPING CART** and **CHECK OUT**. Click the **Continue Shopping** link. Continue Shopping
40.	Click the **Products** link. **Products**
41.	Click the **Office Supplies**. Office Supplies
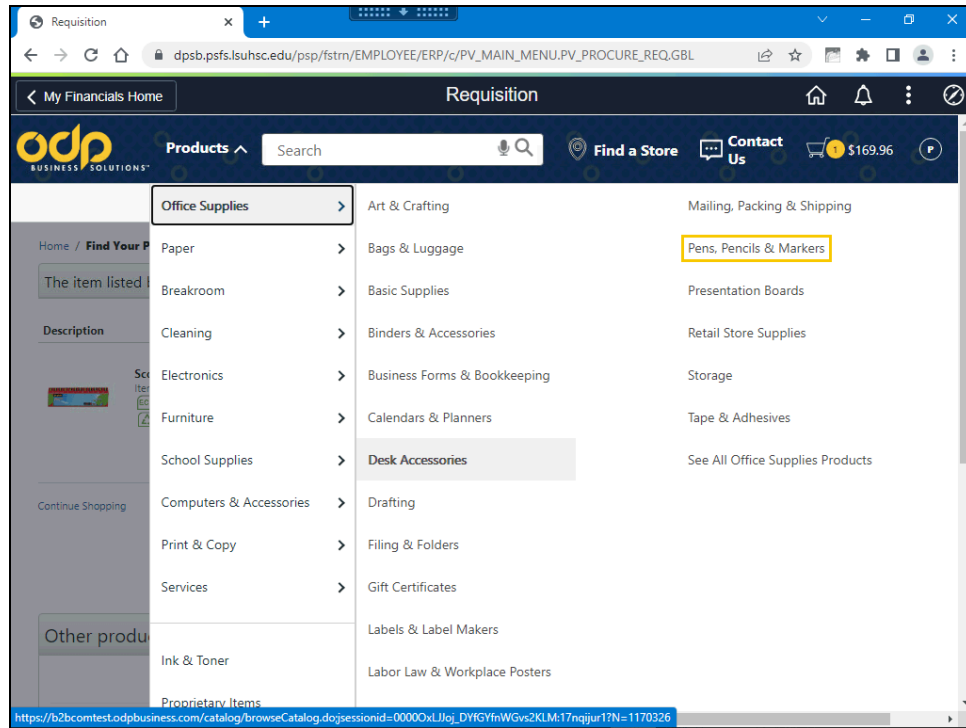
Step	Action
42.	Click the **Pens, Pencils & Markers** link. Pens, Pencils & Markers
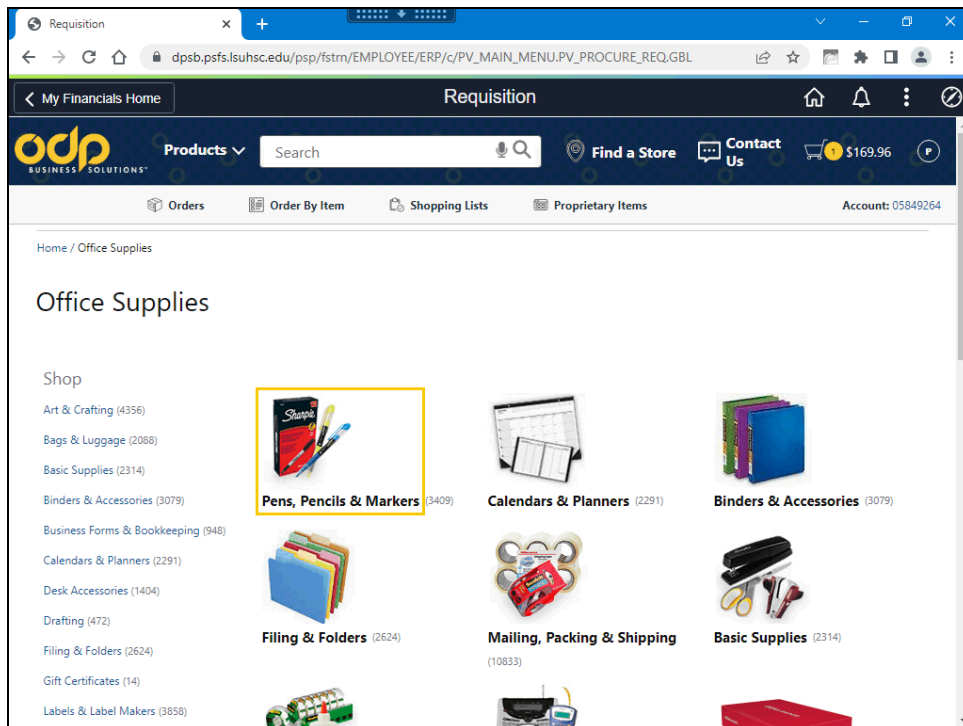
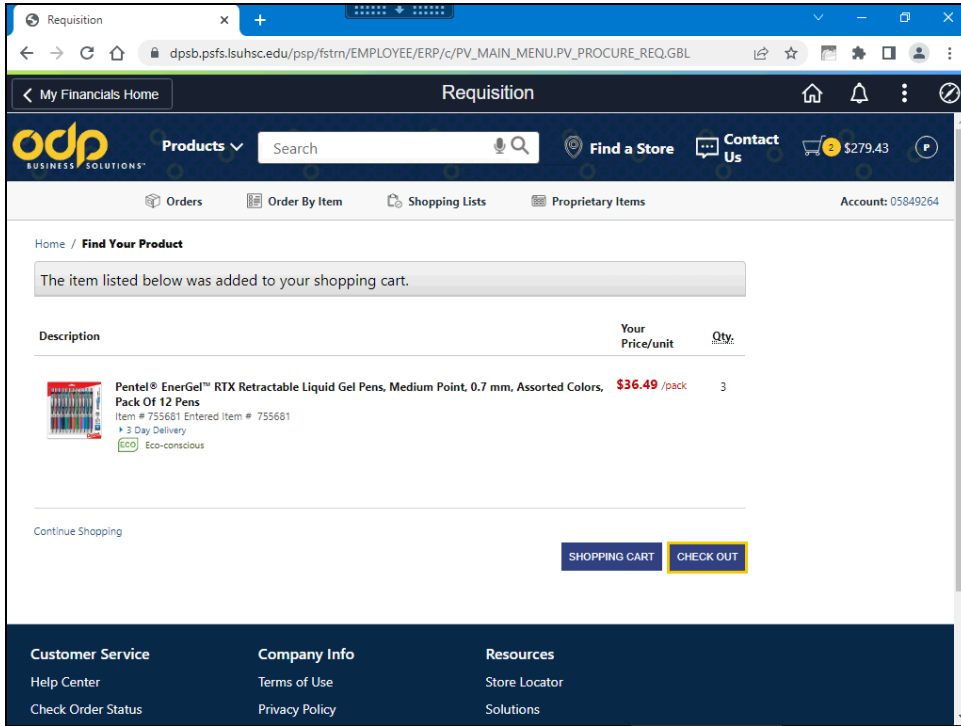| Step	Action
43.	Click the **Gel Pens** button.
44.	Click the **Pens** button.
45.	Click the **Gel Pens** button.
46.	Select the next item for the cart. Enter the desired information into the **Qty** field. Enter "**3**".
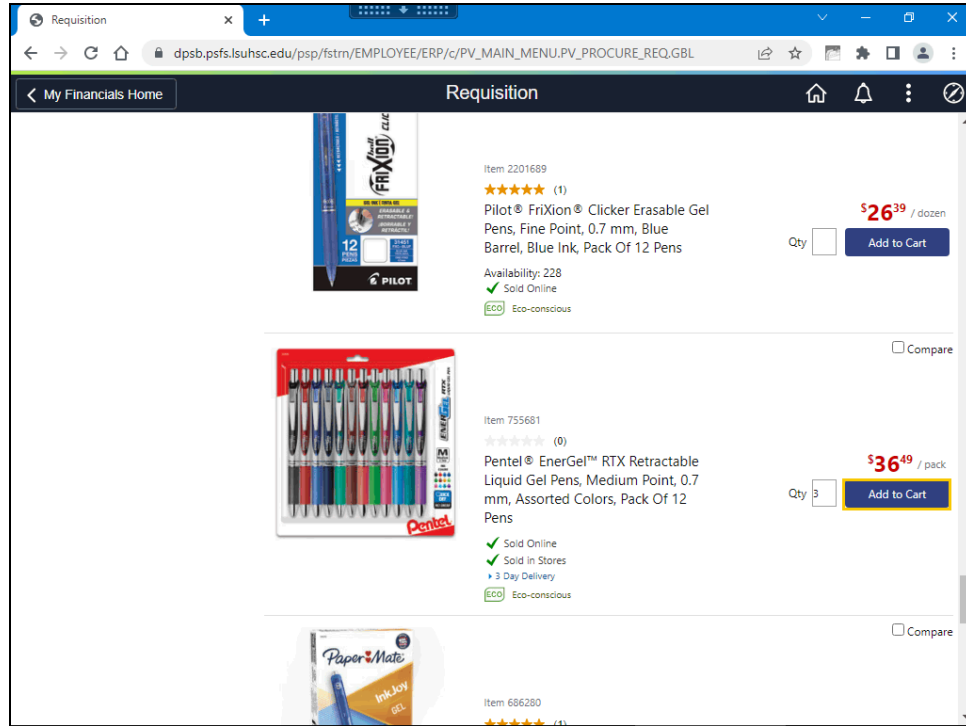
Step	Action
47.	Click the **Add to Cart** button. ![Add to Cart]

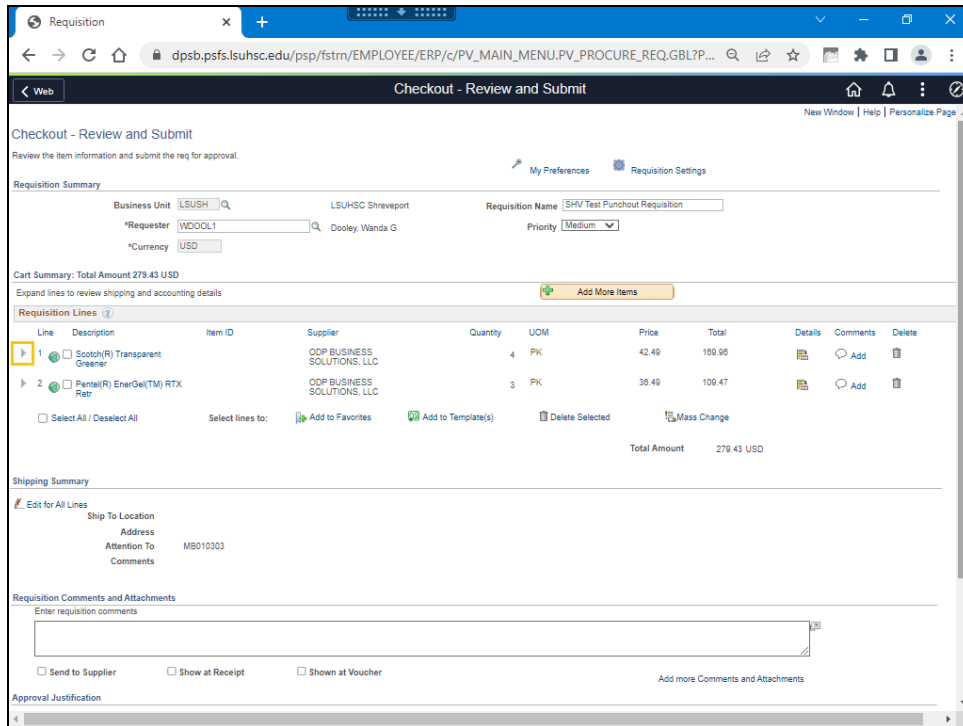| Step	Action
48.	If the item selection is complete, you may select the **SHOPPING CART** button to review the cart or **CHECK OUT** to complete the process. Click the **CHECK OUT** button. *This completes Step 2: Enter punchout line items and checkout.*

Step	Action
49.	**Step 3: Review, Save and Print the requisition** This sends the order back to the eProcurement module for completion. Users may change the **Requisition Summary** information, details about the line or shipping, enter comments and a justification.
50.	The **Requisition Summary** section at the top of the requisition displays the header information. You may change the requisition name and priority if needed.
51.	The **Requisition Lines** section contains information including the description, supplier, quantity, price, and unit of measure. Click the **Description** link for a particular item to view the full description of the item. Comments are available if entered. You may delete a line from the requisition using the trash can icon.

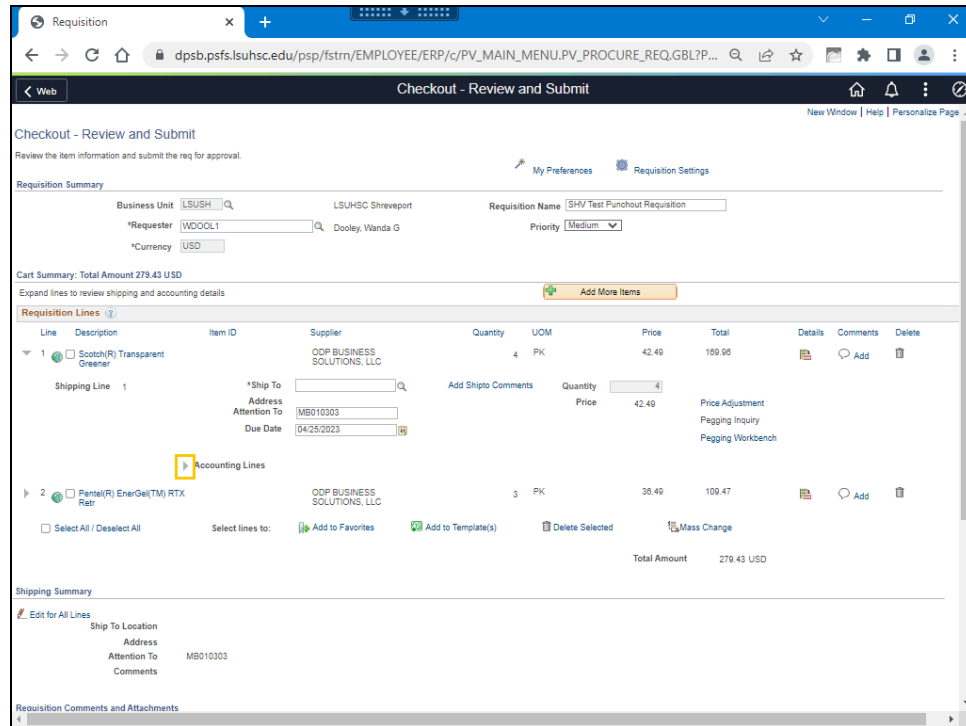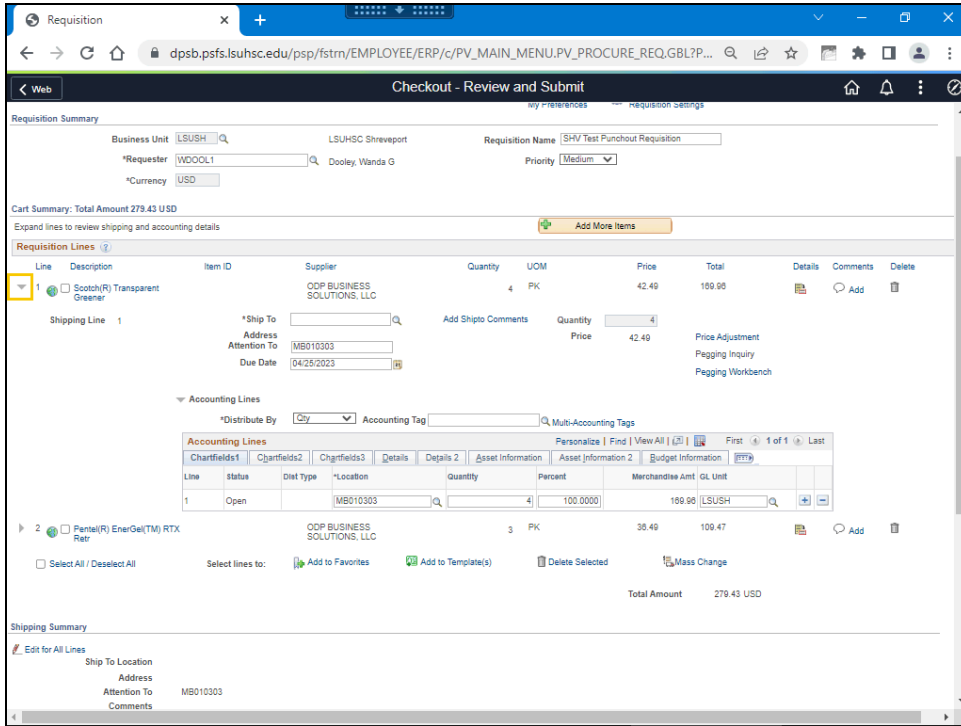| Step	Action
52.	At the left margin of the line item, there is an arrow to expand the line and view the line's Shipping information. Click the **Show Ship To and Accounting** arrow.

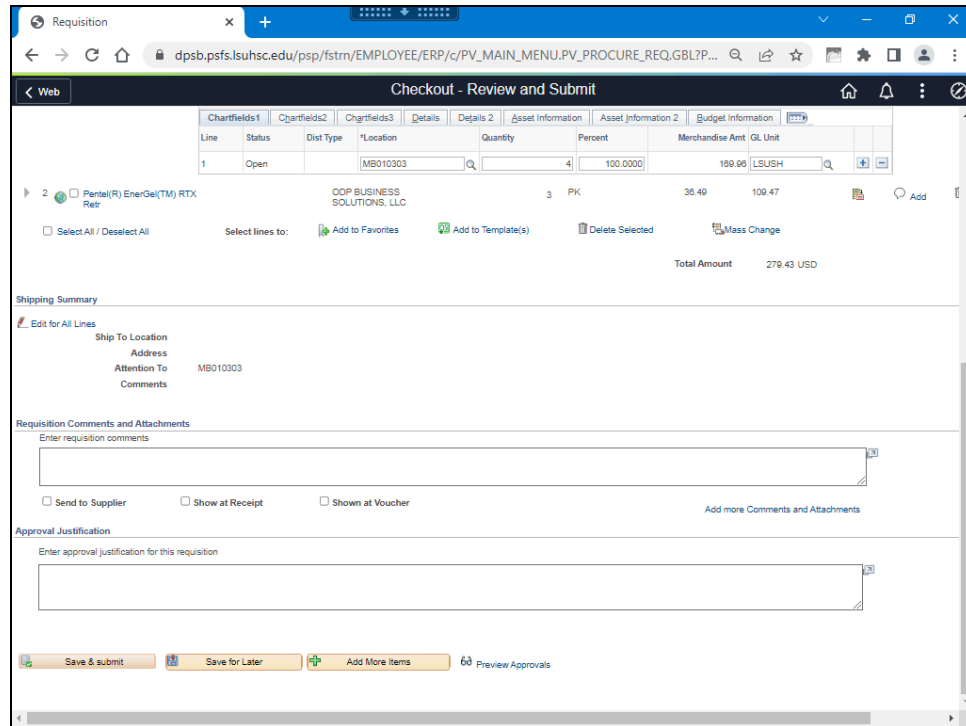| Step	Action
53.	Select the arrow next to Accounting Lines to expand and view the accounting distribution information for the line. Click the **Expand Section Accounting Lines** arrow.
54.	The vast majority of **Punchout Requisitions** (Direct Connect Vendors) will have a ***Distribute By** of Quantity (Default). *NOTE: Special Request Requisitions can use either Quantity (Default) or Amount. Blanket or Service Requisitions should be set to Amount.* Click the button to the right of the ***Distribute By** field.
55.	If the user wants to split the accounting between Chartstrings, the user may select the **Add a new row at row 1 (+)** to add an additional distribution line.

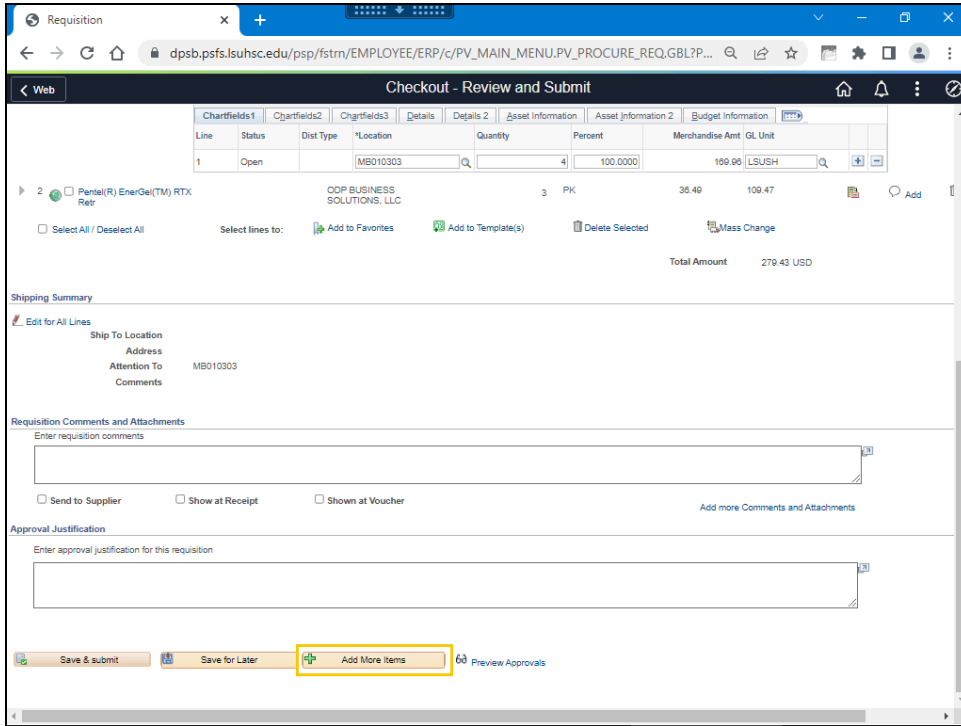| Step	Action
56.	Select the arrow to the left of the line number to collapse the **Shipping and Accounting** information. Click the **Collapse Section** arrow.

Step	Action
57.	The bottom section of the Requisition provides a **Shipping Summary**, a section for **Requisition Comments and Attachments**, and a section to enter **Approval Justification** to be sent to the requisition approver.
58.	**Send to Supplier** - If the Send to Supplier checkbox is checked, any comments shown will be printed on the PO. Purchasing will check this box if needed. **Show at Receipt** - Comments will be shown on the printed receipt when goods/services are received. **Shown at Voucher** - Comments will be shown on the printed voucher.

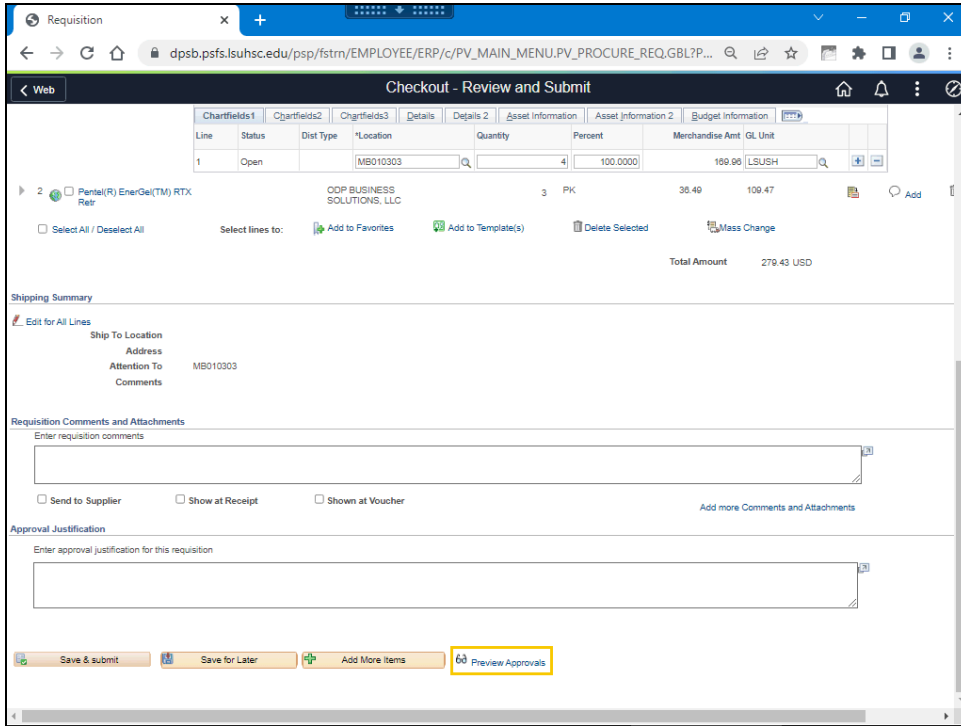| Step	Action
59.	If the user wants to add additional lines to the requisition from this vendor use the **+Add More Items** button which can be found above the Requisitions Line section and at the bottom of the screen. *NOTE: By clicking the + Add More Items button, this will take the user back to the Create Requisition page. <u>Click the same vendor to return to their website to select another item, repeating steps; starting at step #27</u>.*
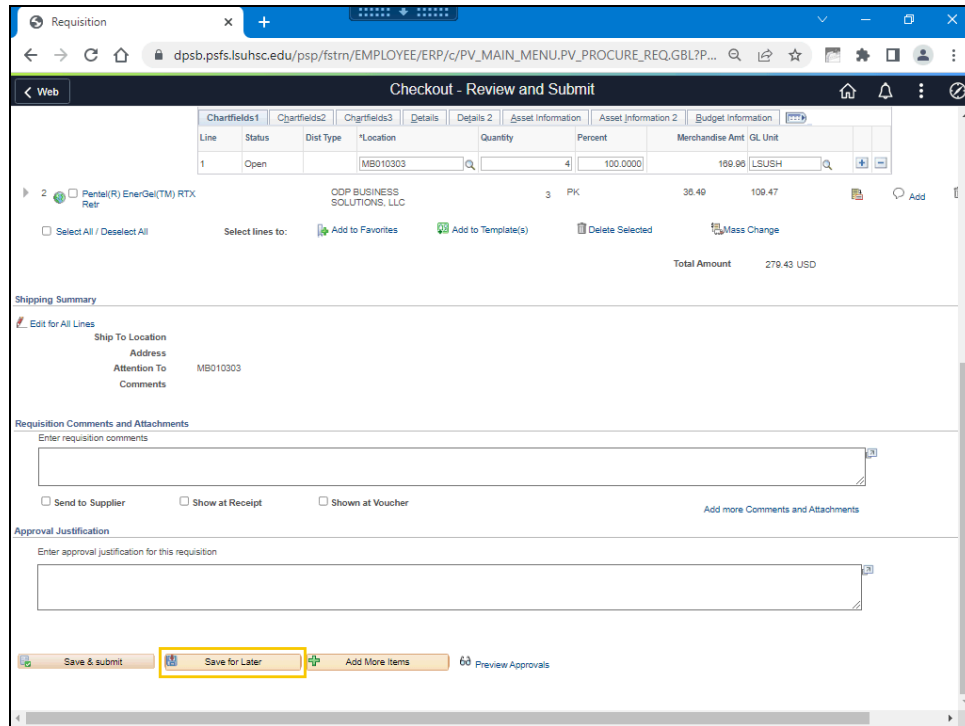
Step	Action
60.	To allow the user to save the requisition and come back to it for additional work use the **Save for Later** button. This is the old function of "Hold From Further Processing" checkbox.

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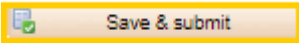
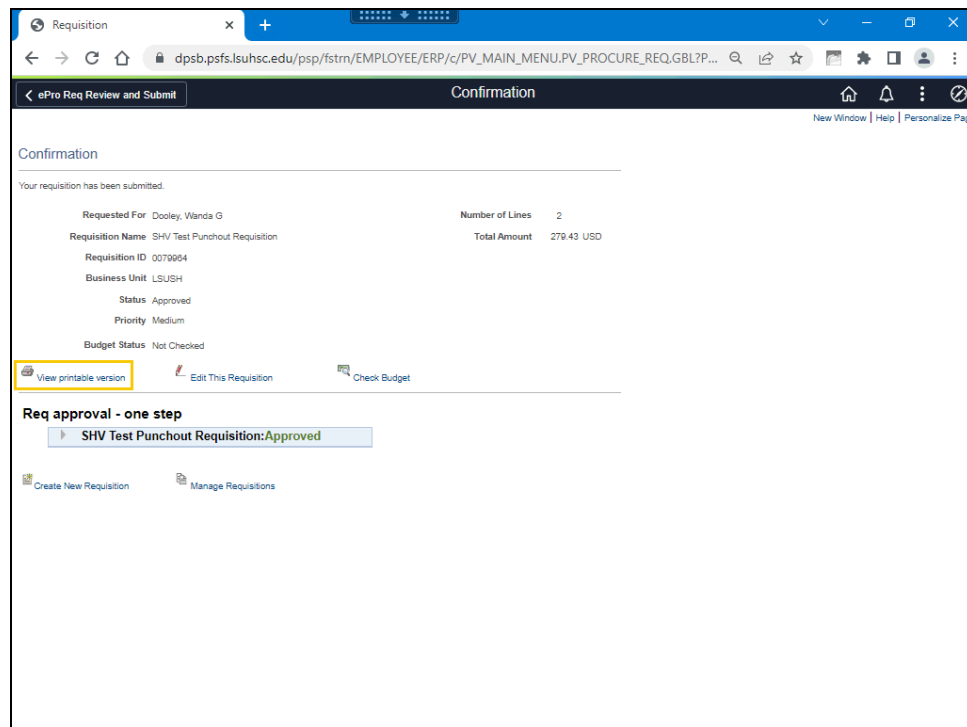| Step	Action
61.	The **eyeglass icon and Preview Approvals** link can be selected once the requisition is saved to check the approval routing for the requisition.
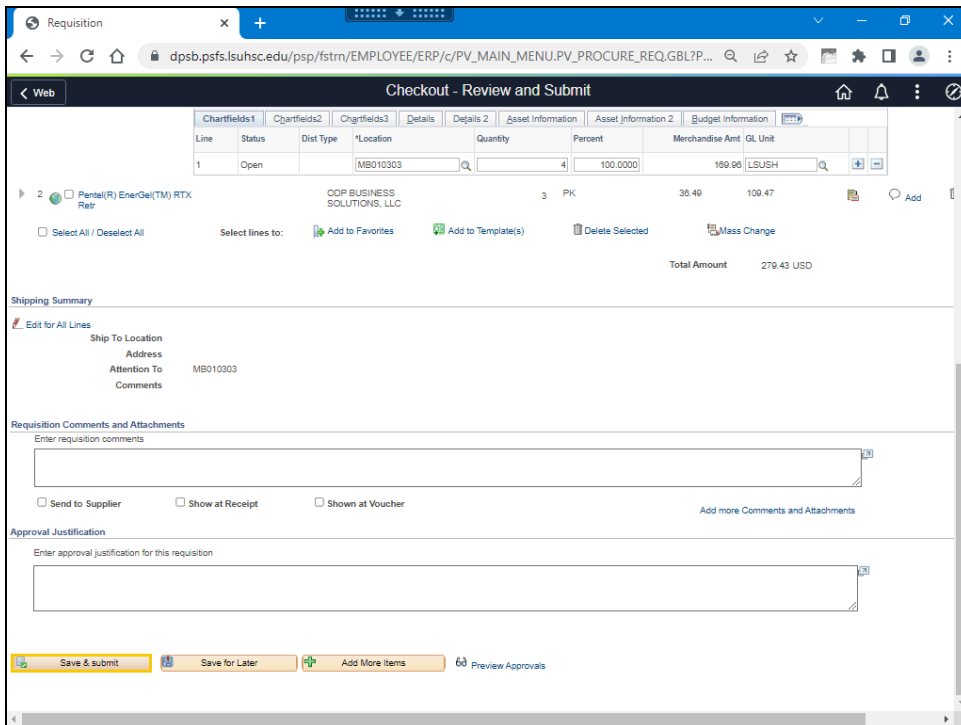
Step	Action
62.	To save the requisition and submit it to workflow for the approver to review and approve use the **Save & Submit** button. Click the **Save & Submit** button. ![Save & submit button]
63.	The **Confirmation** page displays the Requisition ID, Amount, Approval Status, etc. *NOTE: Once the requisition is complete and Approved, the Check Budget process is run. The Check Budget process will be demonstrated in the Budget Check a Requisition topic.*

Step	Action
64.	Users may select to print the requisition, if desired. Click the **View Printable Version** link. ![View printable version]
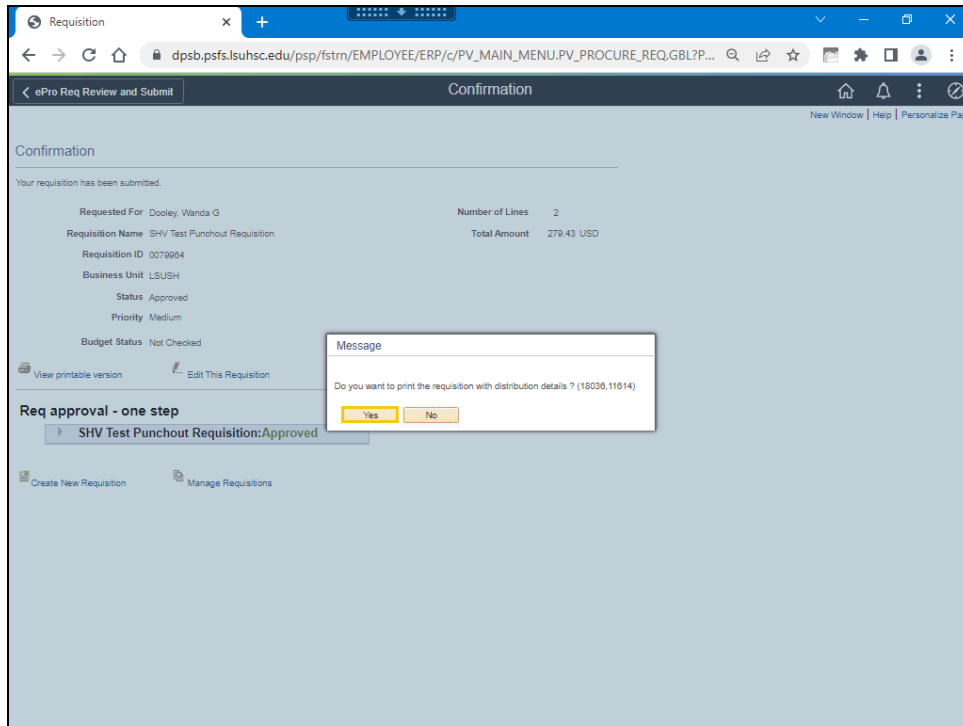
Step	Action
65.	A message will display asking if you want to print the distribution details. Click the **Yes** button. ![Yes]
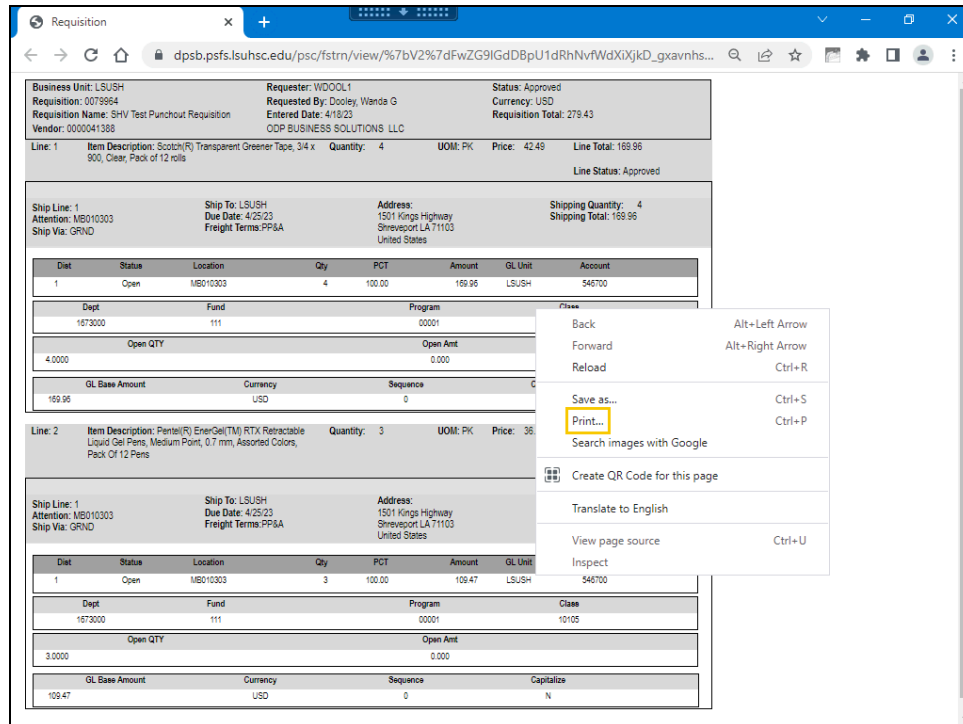
Step	Action
66.	The requisition will process and display for printing. To print, right click anywhere in the requisition and select **Print...**. Click the **Print...** link. Print...
67.	The requisition opens the print pdf window for printing and the user would print the requisition. For **training purposes only**, click the **Cancel** button. Cancel

Step	Action
68.	Once the requisition has printed, the two-toned requisition remains displayed on the screen. Click the **Close** tab.

Step	Action
69.	You are returned to the requisition **Confirmation** page. If you want review other requisitions, select the **Manage Requisitions** link. To create a requisition for another supplier, click the **Create New Requisition** link.
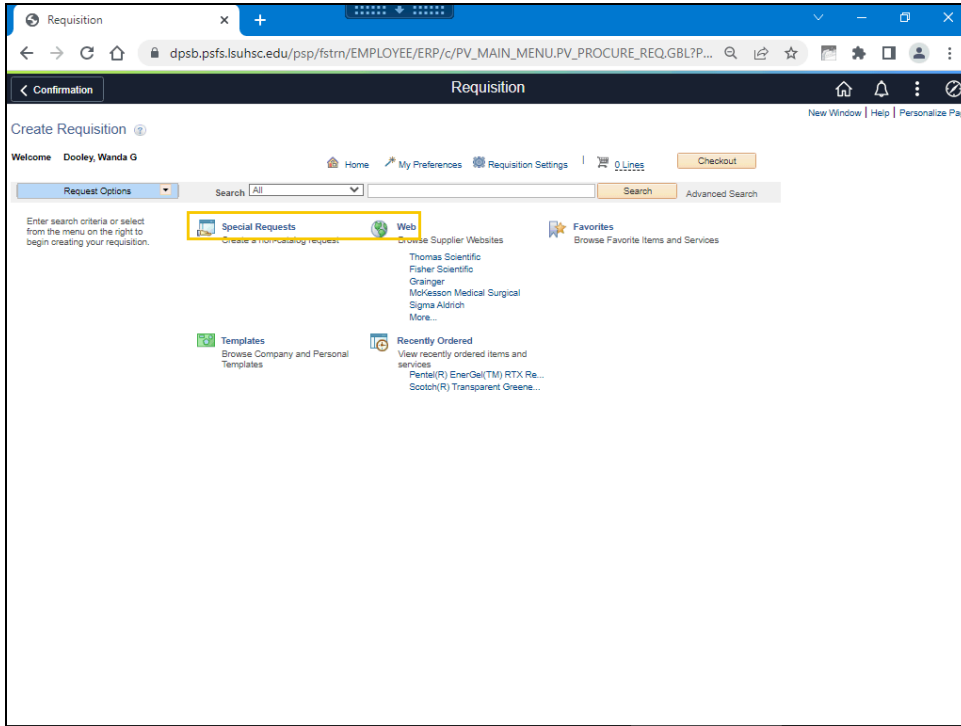
Step	Action
70.	You may choose **Web** then a supplier for a punchout requisition or select **Special Request** to create a **Special Request Requisition**.
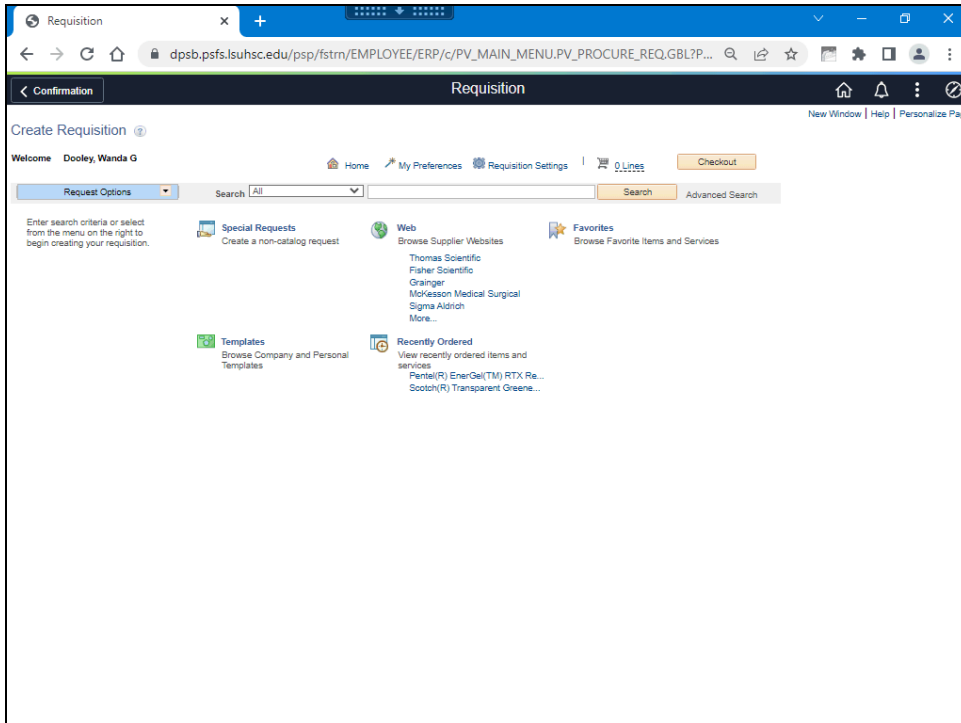
Step	Action
71.	This completes the *Create a Punchout Requisition*. **End of Procedure.**
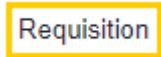
Create a Special Request Requisition

Procedure

This topic will show how to **Create a Special Request Requisition**.

NOTE: eProcurement is a new requisition module which provides electronic commerce transactions with certain suppliers by web punchout to their catalog, returning the request to the PeopleSoft Financials application, then submitting the order to the supplier. All other requisitions may be created through the Special Requests feature.

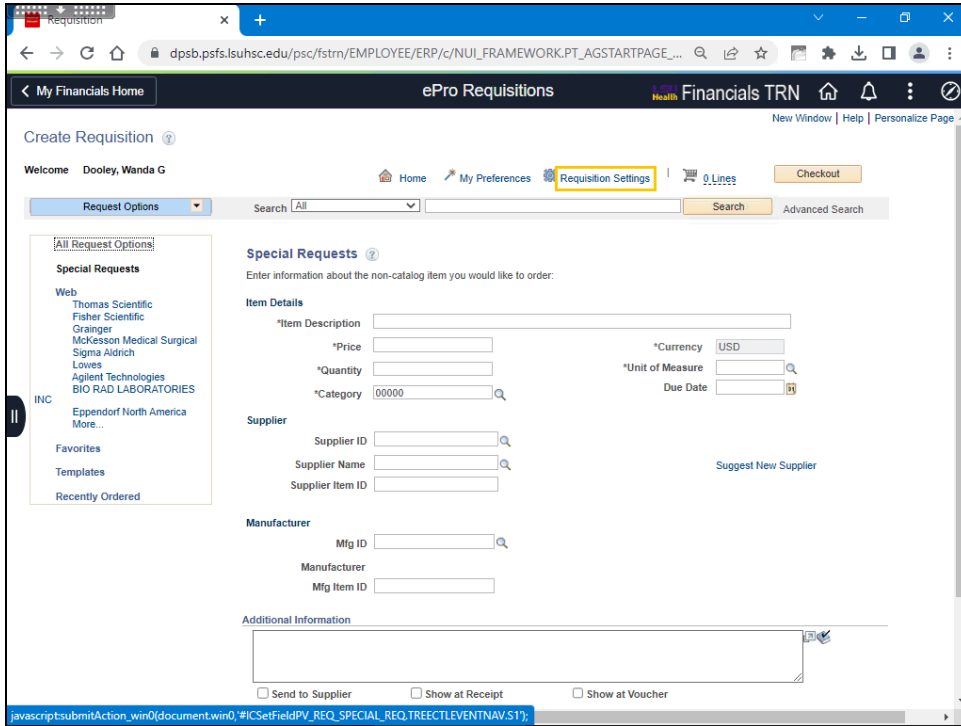| Step	Action
1.	Click the **Main Menu** link.
2.	Click the **Main Menu** link.
3.	Click the **eProcurement** link.
4.	Click the **Requisition** link.
5.	There are **four** (4) **steps** to creating a Special Request Requisition: **1.** Enter Requisition Settings **2.** Enter Item Information **3.** Checkout and Review the Requisition **4.** Enter Requisition Comments and Submit and Print the Requisition *NOTE: Changing the order of the steps may cause default and save errors which may result in the re-entering of the requisition by the Requester.*
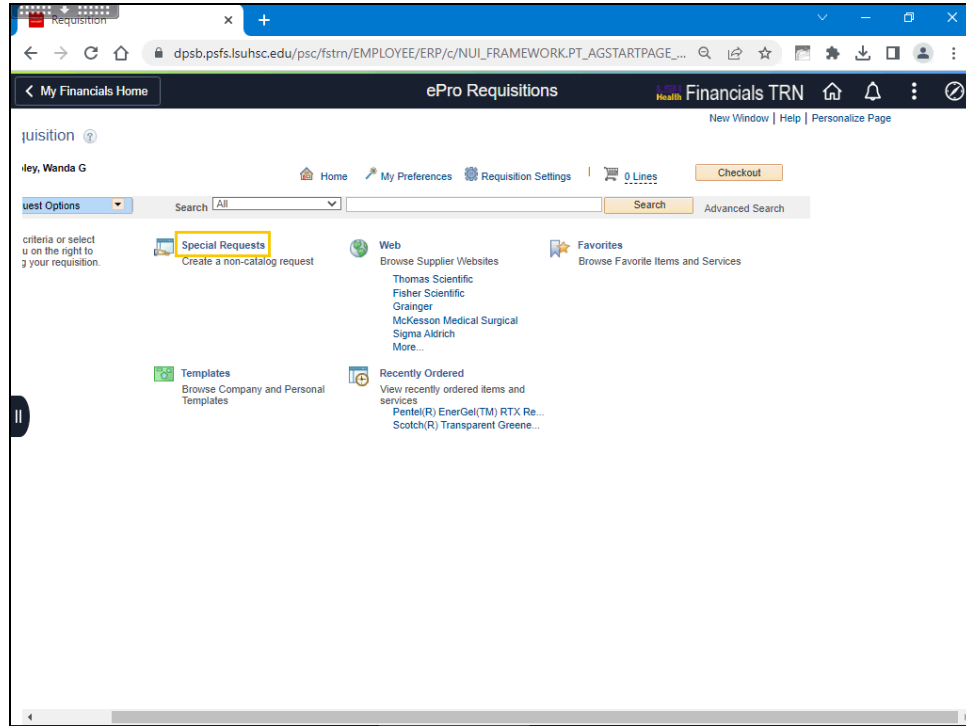
Step	Action
6.	The **Create Requisition** screen will display. Click the **Special Requests** link.

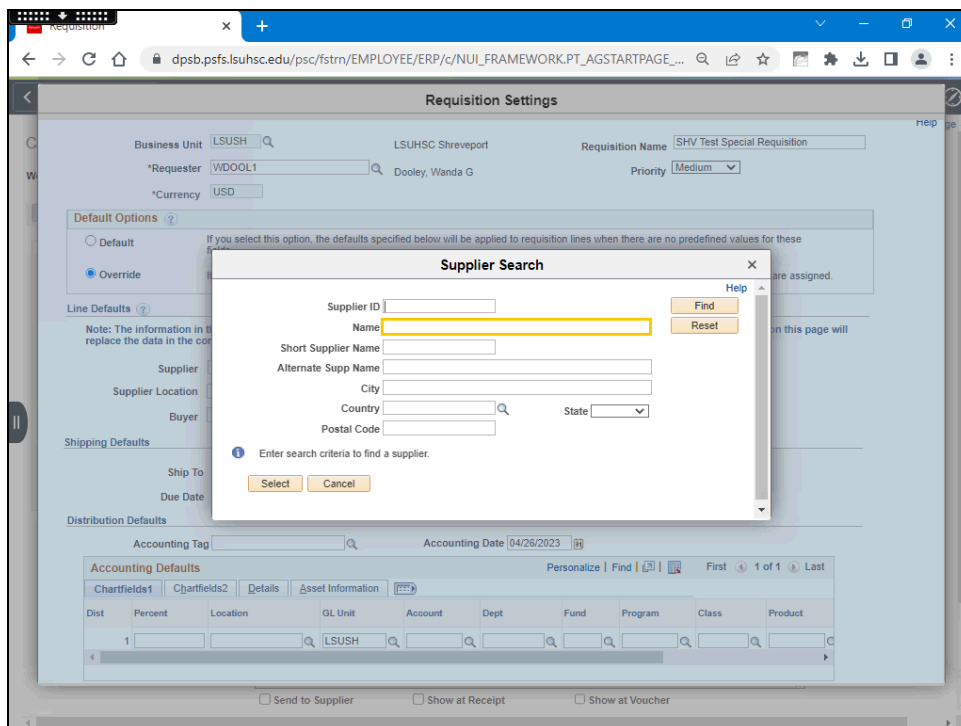| Step	Action
7.	**Step 1: Enter Requisition Settings** The **Special Requests** page will display for data entry. Click the **Requisition Settings** link. Requisition Settings

Step	Action
8.	The **Requisition Settings** page allows users to enter supplier, shipping, chartstring, etc., information on one page rather than for each line item of the requisition. Thus, this page represents the default settings for the user's eProcurement requisition. The **Requester**, **Location**, and **Chartstring** information are defaulted from the Requester's profile. You may change the information if you desire.
9.	The top section of the **Requisition Settings** page allows the user to enter a *Requisition Name*, change the priority, as well as change the requester if entering the request for another user *(i.e., a Department Approver can change the Requester to any Requester that they approve. Buyers can do the same for all requesters)*. Enter the desired information into the **Requisition Name** field. Enter "**SHV Test Special Requisition**".
10.	Requisitions **do not** have to be approved in any particular order. However, you may click the **Priority** drop-down arrow next to the requisition links to make a notation of the priority order in which you wish the Approver to approve the requisitions in his/her Worklist. *NOTE: This does not reorder the requisitions on the Worklist.*

Step	Action
11.	*NOTE: The priority could be the importance of the requisition or the expected turnaround time. In the Worklist, the priority of the requisition is displayed and can be sorted by priority by clicking on the Priority column header.* **Low** - Turnaround time is not a priority. **Medium** - The default value for all requisitions, the expectation for approval is within a few days. **High** - Very important, approval is expected within a day. For example, an emergency requisition needed to be ordered and paid for quickly.
12.	The **Line Defaults** section is where you will begin to enter default information. If known, you may enter the supplier information directly into the Supplier field, or you can search for the supplier using the **Look Up Supplier** button to the right of the Supplier field. *See Using the Look up Feature in the Requisition Basics - Review for Edit section for information on how to use the Search for Supplier Look up feature.* Click the **Look Up Supplier** button.
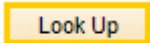
Step	Action
13.	*ACCUTEMP* will be the supplier used for this example. ***NOTE: If the supplier is not located in Supplier Search, please contact your Buyer for assistance.*** Enter the desired information into the **Name** field. Enter "**ACCU**".
14.	Click the **Find** button. Find

Step	Action
15.	Click the **Select this row** option next to the supplier you would like to choose. In this example, the Supplier is located in Supplier Search and the row for *ACCUTEMP PRODUCTS, INC.* will be selected. ○
16.	Click the **Select** button. Select

Step	Action
17.	The Supplier Name and Location defaults into the Requisition Settings page. Click the **Look Up Buyer** button to the right of the **Buyer** field.
18.	Users may enter all or part of the last name of the *Buyer* in the **Name** field. Enter the desired information into the **Name** field. Enter "**TEMPLE**".
19.	Click the **Look Up** button.
20.	Click the **Buyer** link.
21.	In the Shipping Defaults section, the **Due Date** is the date you expect to receive the items ordered. If you know the proper format for the date, click in the **Due Date** field and type in the desired date. If not, click the **Calendar** button to the right of the **Due Date** field.
22.	Click the November **10**, 2021 link.
23.	In the **Attention** field, enter the name of the person to whom the delivery will be made. Enter the desired information into the **Attention** field. Enter "**MB010303 - DOOLEY**".
24.	In the **Distribution Defaults** section, the **Accounting Tag** represents the Speedtype. The **Accounting Date** defaults to the current date.
25.	The chartstring information in the **Accounting Defaults** section may be changed by selecting an *Accounting Tag* or by *manually* changing each of the values in the Accounting Defaults section. Entries or changes made on the **Requisition Settings** page, prior to selecting any requisition lines will carry forward to all lines.

Step	Action
26.	**Location** **LSUSH** uses an 8-10 alphanumeric code, so the default will be changed for all LSUSH requisitions. Each department has an assigned code. Below are examples of two LSUSH Location codes: **1.** Surgery Department - MB010303: MB designates Medical 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
27.	The **Location** entered in the **Accounting Defaults** indicates where the delivery will be made. If the Location does not default it may be entered, or you may use the **Look Up Location** button to the right of the **Location** field. Enter the desired information into the **Location** field. Enter "**MB010303**".
28.	The **Account** field is typically blank on the Requisition Settings page. Users may enter the **Account** prior to selecting any requisition lines and the **Account** number will be defaulted for each line item added to the requisition. In this example, the **Account Code** for *Scientific Supplies, Equipment* will be used. Enter the desired information into the **Account** field under Accounting Defaults section. Enter "**549200**".
29.	The **Dept.** will be the department number to which the items will charged. Enter the desired information into the **Dept** field. Enter "**1053000**".
30.	The **Fund** Code identifies the funding source for the item(s) being ordered. If the item(s) involves a Project/Grant, you will need to enter the Fund Code associated with the specified Project/Grant (i.e., 113,115,116, etc.) Enter the desired information into the **Fund** field. Enter "**111**".
31.	Enter the desired information into the **Program** field. Enter "**00001**".
32.	Enter the desired information into the **Class** field. Enter "**10105**".
33.	Click the **OK** button. *This completes Step 1: Enter Requisition Settings.* OK

Step	Action
34.	**Step 2: Enter Item Information** The **Item Description** is a required field. It is a free-form text field, meaning you can use upper, lower,or mixed case for letters. Numbers and special characters are also usable in this field. The **Item Description** needs to be descriptive enough for the Buyer's to understand what you wish to purchase, without being overly verbose. Enter the desired information into the ***Item Description** field. Enter "**Test Item Ordered for Class**".
35.	**Price** is a required field. When entering the cost of an item into the **Price** field, users must enter the decimal point to indicate cents (e.g., 12.99). Enter the desired information into the **Price** field. Enter "**25.00**".
36.	**Quantity** is a required field. The **Quantity** must be entered in whole numbers (e.g., 10 or 11 rather then 10.5). Enter the desired information into the **Quantity** field. Enter "**35**".
37.	**Category** is a required field, but will remain as defaulted with the **00000** General Item Category Code.

Step	Action
38.	**Unit of Measure (UOM)** is a required field and may be entered in upper, lower or mixed case. You may enter the **UOM** directly into the **Unit of Measure** field, or you can search for it by clicking the magnifying glass to the right of the **Unit of Measure** field. Click the **Look up Unit of Measure** button.
39.	In this example, the **Each (EA)** option will be used for the **Unit of Measure**. Click the **EA** link.
40.	Click the **Add to Cart** button. *This completes Step 2: enter Item Information.*

Step	Action
41.	**Step 3: Checkout and Review Special Requests Requisition**
	In the top right of the screen you will now see that an item has been added to the cart. The number next to the cart is the item added.
	If this is the only item to purchase from this Supplier, click the **Checkout** button to the right of the cart.
	Checkout
42.	The **Checkout - Review and Submit** page appears.
	The **Requisition Summary** section at the top of the requisition displays the Header information. The *Requisition Name* and *Priority* may be changed if desired.
43.	The **Requisition Lines** section is loaded with information including the **Description, Supplier, Quantity, Price,** and **Unit of Measure**.
	Requisition Lines Comments are available if entered.
	Click the **Expand Shipping Line** arrow to the left of the **Line** field.
	▶
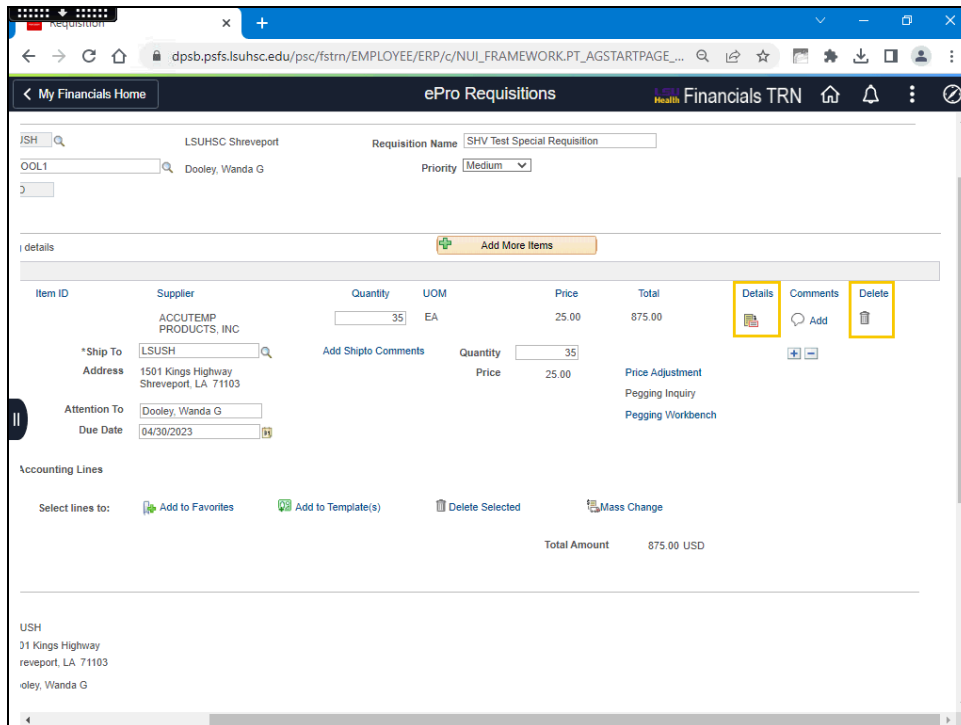
Step	Action
44.	The **Details** icon provides the full description of the item. The user may **Delete** a line from the requisition using the trash can icon located on the far right of the line item.
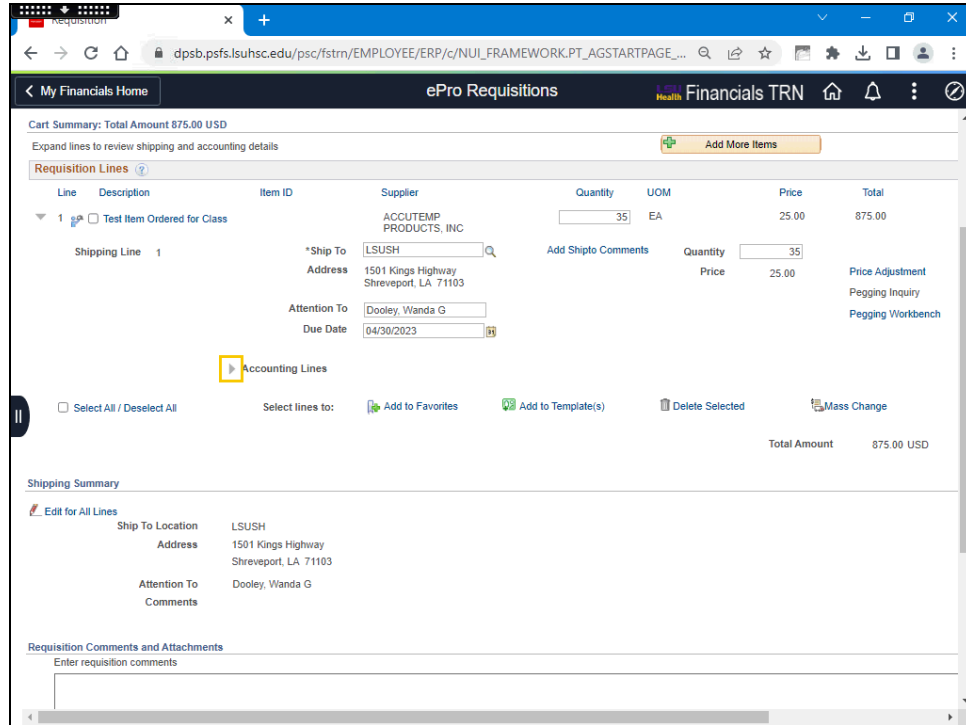
Step	Action
45.	To view the **Accounting Distribution** information for the line, click the button to the left of the **Accounting Lines** field.

Step	Action
46.	The **Distribute By** field indicates whether cost is being allocated by *Quantity* or *Amount*. Most blanket requisitions are distributed by amount, especially those covering services. The **Distribute By** defaults based on the information entered on the *Requisition Settings* page. The **Distribute By** can be changes on the *Accounting Lines* for a specific line item as needed. Click the button to the right of the ***Distribute By** field.
47.	If the user wants to split the accounting allocation between Chartstrings, the user may select the (+) at the end of the line to add an additional distribution line. ***See the "Split a Distribution on a Requisition" section located later in this manual for additional information.***
48.	Click the button to the left of the Line field to **Collapse Shipping and Accounting** field information. ***This completes Step 3: Checkout and Review Requisition.***
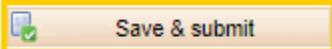
Step	Action
49.	**Step 4: Enter Requisition Comments and Submit and Print Requisition** The bottom section of the requisition provides a **Shipping Summary**, a section for **Requisition Header Comments** and Attachments and a section to **Enter Approval Justification for this requisition** to be sent to the requisition approver. *See the "Add Comments and Attachments" section located later in this manual for additional information.* Enter the desired information into the **Enter requisition comments** field. Enter "**Enter any comments for the requisition here.**".

Step	Action
50.	The buttons at the bottom allow the user to choose his/her next step.
	Save & Submit - this button is used to save the requisition and submit it to workflow for the approver to review and approve.
	Save for Later - this allows the user to save the requisition and come back to it for additional work at a later time. This button performs the same function as the "Hold from Further Processing" checkbox.
	Add More Items - if the user wants to add additional line to the requisition from this supplier.
	The **Eyeglass icon and Preview Approvals** link can be selected once the requisition is saved to check the approval routing for the requisition.
	Click the **Save & Submit** button.
51.	The **Confirmation** page displays the Requisition ID, Amount, Approval Status, etc.
	NOTE: Once the requisition is complete and Approved, the Check Budget process is run. The Check Budget process will be demonstrated in the Budget Check a Requisition topic.

Step	Action
52.	The **Confirmation** page displays the Requisition ID, Amount, Approval Status, etc. Click the **Check Budget** button.
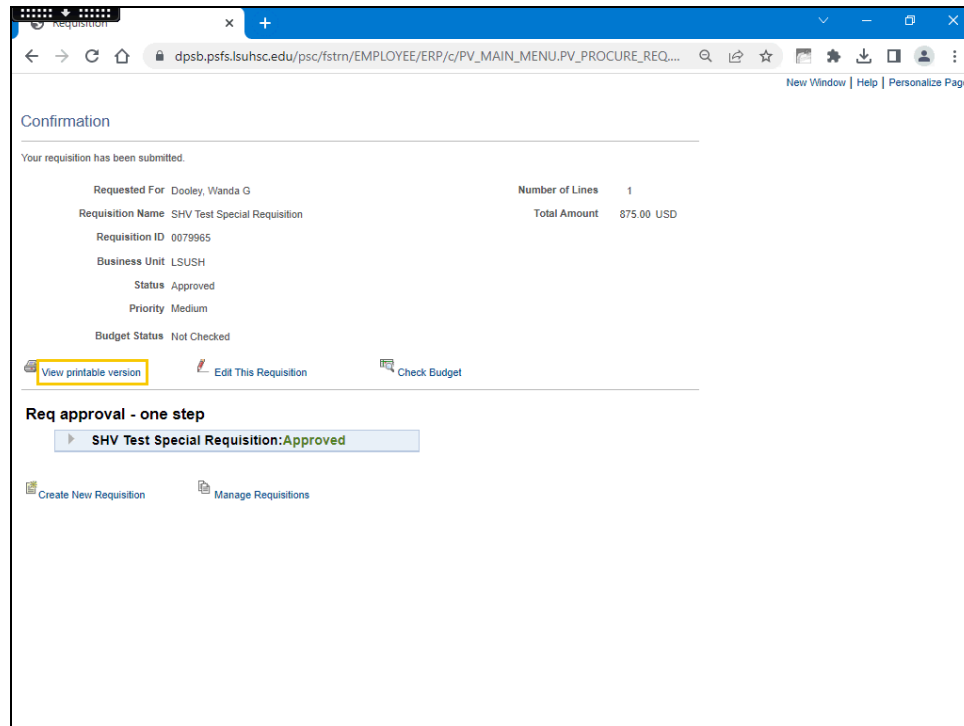
Step	Action
53.	The user may also select the **View Printable Version** link to print the requisition if needed. Click the **View Printable Version** button.
54.	A message will display asking if you want to print the distribution details. Click the **Yes** button.
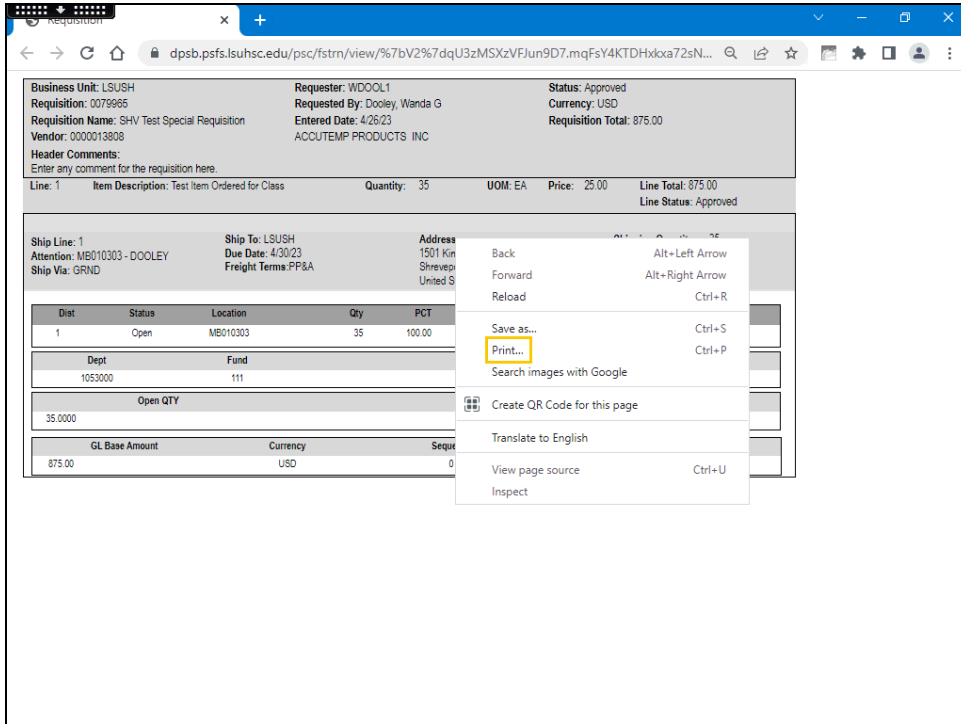
Step	Action
55.	The requisition will process and display for printing. To print, **right-click** anywhere in the requisition and select **Print...**. Click the **Print...** link. Print...
56.	The requisition opens the print pdf window for printing and the user would print the requisition. For **training purposes only**, click the **Cancel** button. Cancel
57.	Once the requisition has printed, the two-toned requisition remains displayed on the screen. Click the **Close** button. ×
58.	To create a requisition for another supplier, select the **Create New Requisition** link. If you want to review other requisitions, select the **Manage Requisitions** link.

Step	Action
59.	This completes the *Create a Special Request Requisition*. **End of Procedure.**

Split a Distribution on a Requisition

Procedure

In this topic you will learn to **Split a Distribution on a Requisition**.

NOTE: When entering a new requisition or editing an existing one, the allocation can be split to distribute to different chartstrings. In this example, an allocation by Quantity will be split to distribute to different departments.

Step	Action
1.	*NOTE: When creating a new requisition, and after adding items to the cart, proceed to checkout and the distribution can be entered and changed in the Checkout - Review and Submit screen. Although, it is HIGHLY recommended that this step be done in the setup (Requisition Settings) prior to adding any items to the cart.*
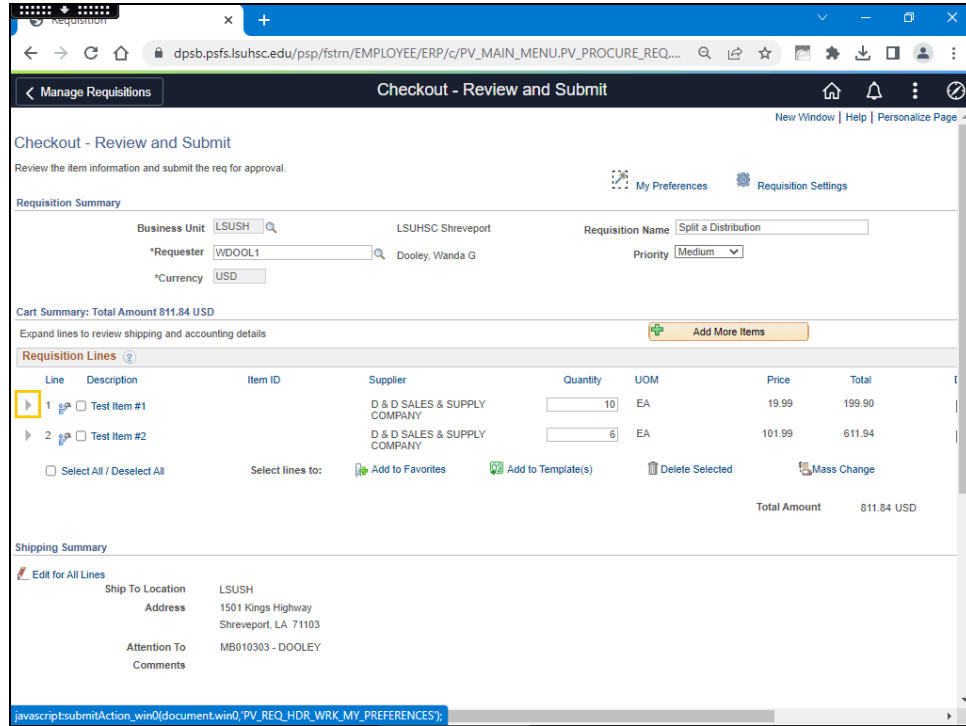
Step	Action
2.	Click the **Expand Requisition Lines** arrow.
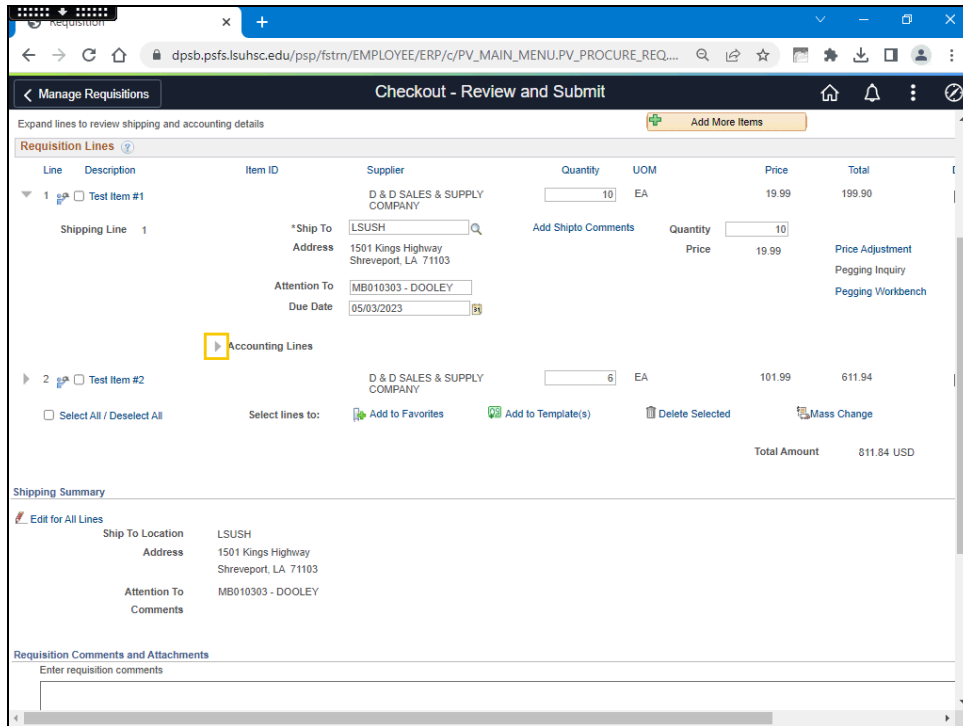
Step	Action
3.	Click the **Expand Accounting Lines** arrow.

Step	Action
4.	The information entered on the *Requisition Settings* page will default to all lines items. The **Distribute By** field indicates whether costs are being allocated by *Quantity* or *Amount*. The **Distribute By** can be changed in the *Accounting Lines* section for a specific line item as needed. This allows users to not only split line item cost allocations by Quantity or Amount, but to also split allocations between departments, funds, projects, etc. Click the **Add a new row at row 1** button.
5.	In this example, the user will split the cost allocation by **Quantity** between two departments for the specified line item. The chartstring will be split evenly between the two department. Enter the desired information into the Line 1 **Quantity** field. Enter "**5**".
6.	Enter the desired information into the Line 1 **Percent** field. Enter "**50**".
7.	Enter the desired information into the Line 2 **Quantity** field. Enter "**5**".
8.	Enter the desired information into the Line 2 **Percent** field. Enter "**50**".
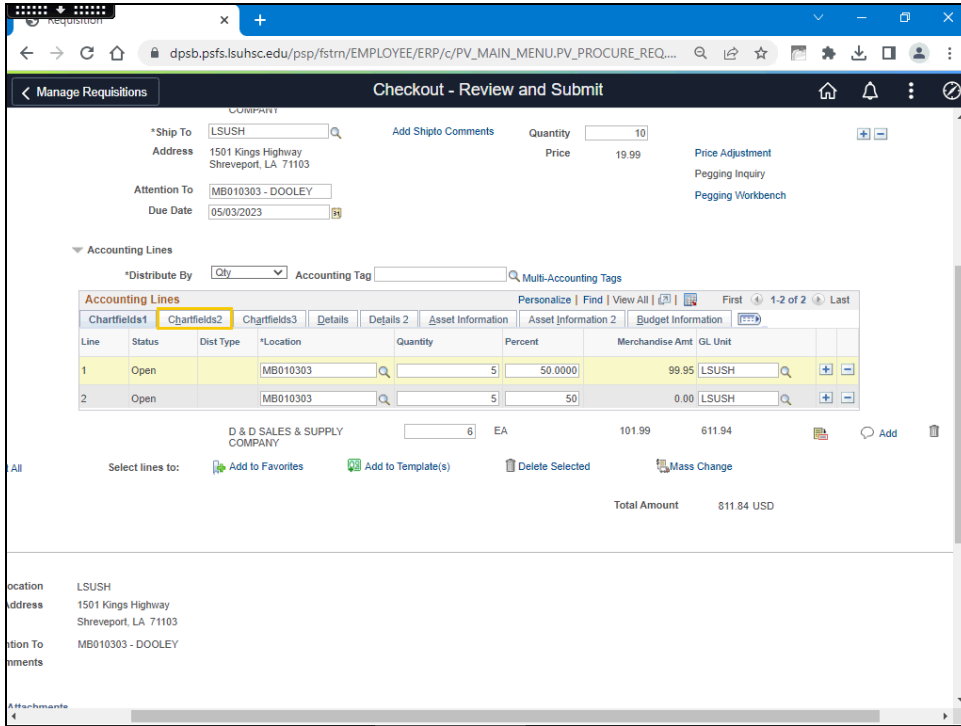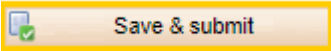
Step	Action
9.	Click the **Chartfields2** tab.

Step	Action
10.	The chartstring information has been entered on Line 2 to complete the distribution split. Notice the **Dept** number on Line 2 is different than Line 1. Because the **Dept** is different, the *Fund*, *Program* and *Class* can remain as defaulted. A user could also use the same *Dept* for both lines and change the **Fund**, **Program** or **Class** instead.
11.	Once the distribution information has been entered, the updated information will need to be Saved. If the requisition is complete, the user would select the Save & Submit button. If the user is not finished with the requisition but needs to come back to it later, then the Save for Later button would be selected. ***See the Edit an ePro Requisition Add Lines for additional information on retrieving Save for Later requisitions.*** Click the **Save & Submit** button. Save & submit
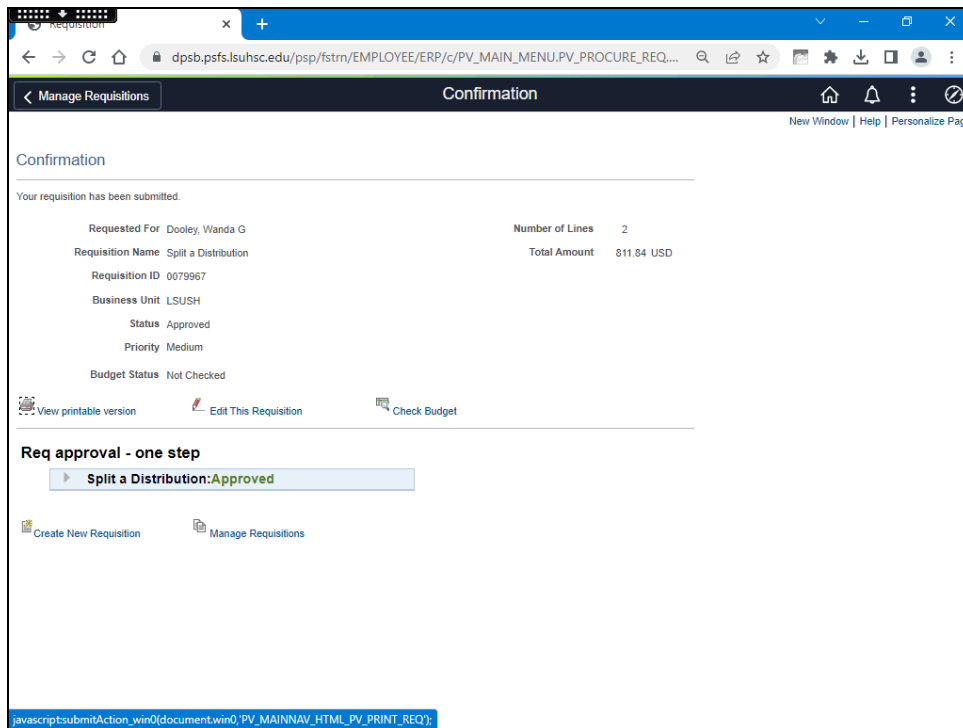
Step	Action
12.	The requisition will be submitted for Approval. Once approved, the requisition will have to be budget checked before it can be sourced to a PO.
13.	This completes *Split a Distribution on a Requisition*. **End of Procedure.**
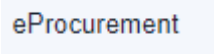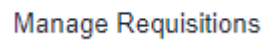
Find/Edit a Save for Later Requisition

Procedure

In this topic you will learn how to **Find/Edit a Save for Later Requisition**.
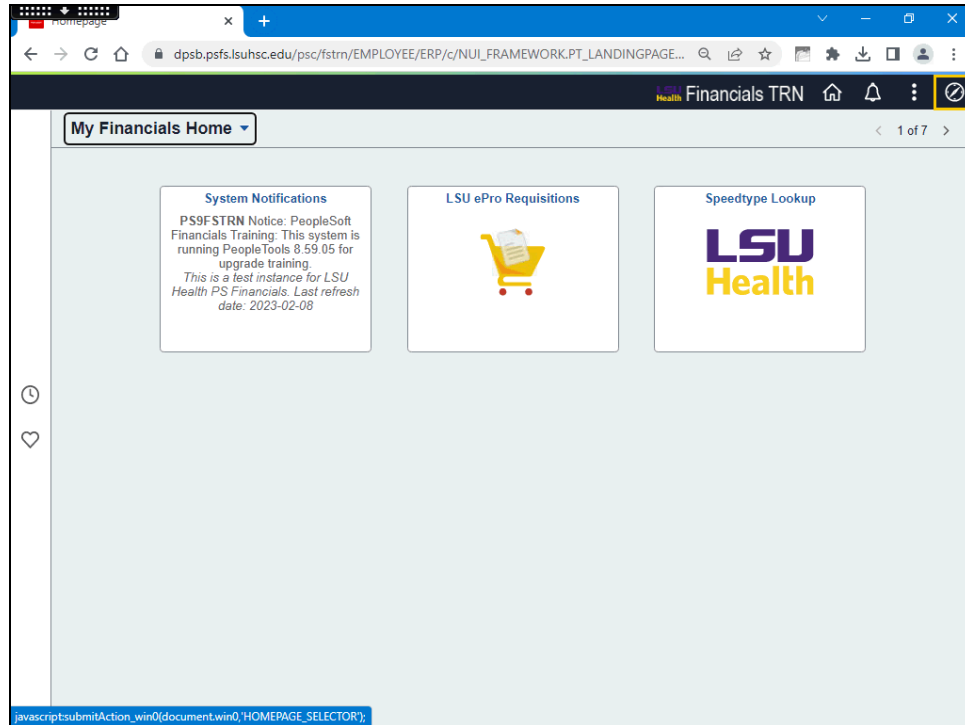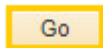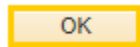
Step	Action
1.	Click the **Main Menu** button.
2.	Click the **eProcurement** link.
3.	Click the **Manage Requisitions** link.

Step	Action
4.	If your requisition does not automatically display in the Requisitions section, users may search the requisition by entering the Requisition ID, Requisition Name, Requisition State, or by changing the Date From or Date To. In this example, the requisition (**0079965**) will be used. Click the button to the right of the **(Select Action)** field.
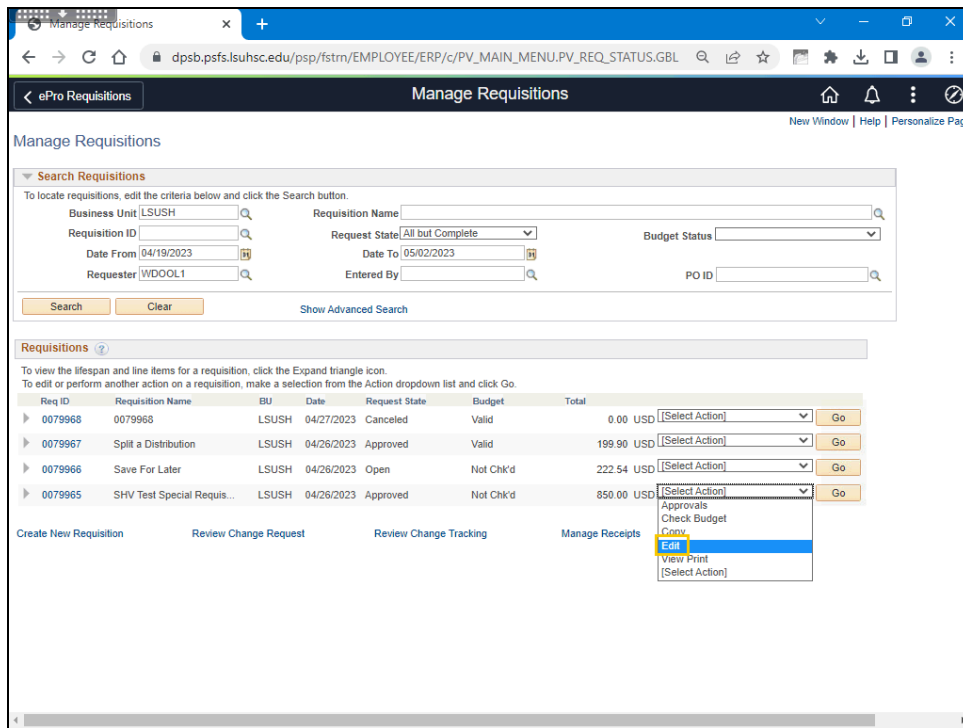
Step	Action
5.	Click the **Edit** list item.
6.	Click the **Go** button.
7.	*NOTE: If the requisition has already received prior approval, making changes will restart the approval process.* Click the **OK** button.
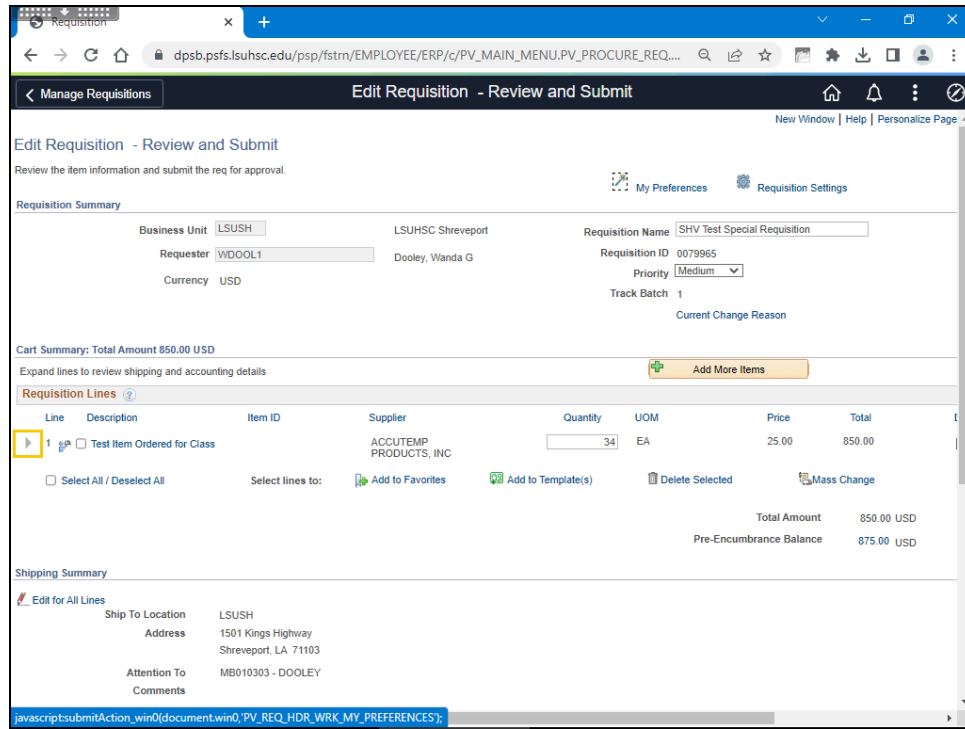
Step	Action
8.	Click the **Expand Requisition Lines** link.
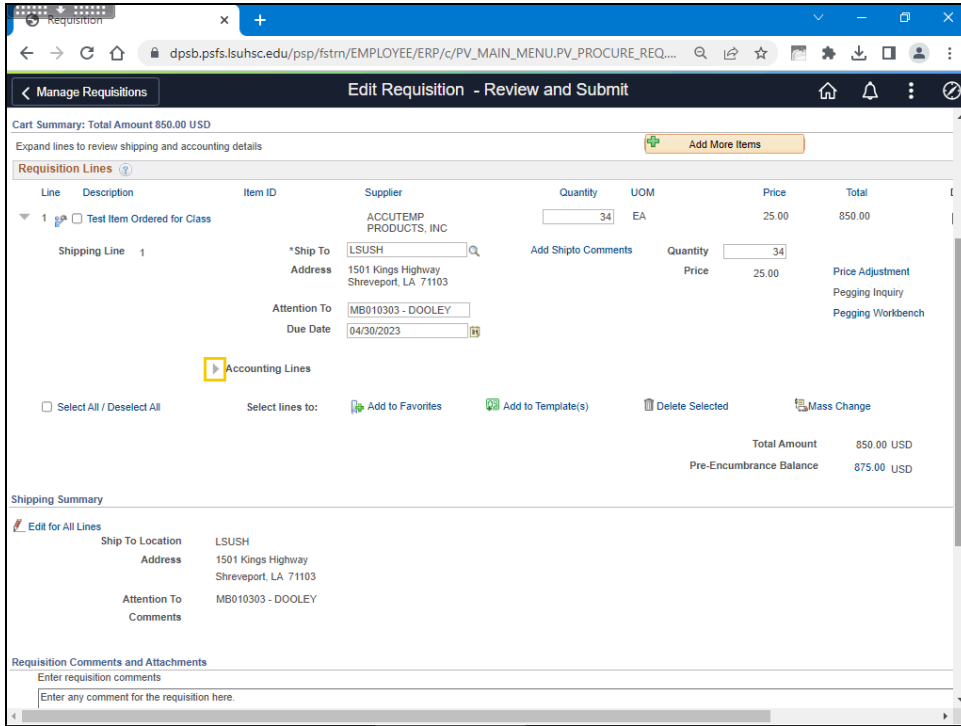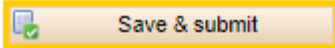
Step	Action
9.	Click the **Expand Accounting Lines** link.

Step	Action
10.	Users can *Add More Items* to the requisition, *change the Quantity* of items ordered, *delete an item* using the Delete button at the end of Line number desired, etc. In this example, the user will change the **Quantity** from 3*4* to *50*. Enter the desired information into the **Quantity** field. Enter "**50**".
11.	If the requisition is still <u>not</u> complete, the user can again select the *Save For Later* button. In this example, the requisition is complete, so the user will save and submit. Click the **Save & submit** button. Save & submit
12.	*NOTE: Because the requisition had been approved, a Reason Code for the change is needed for tracking purposes.* Click the **OK** button. OK
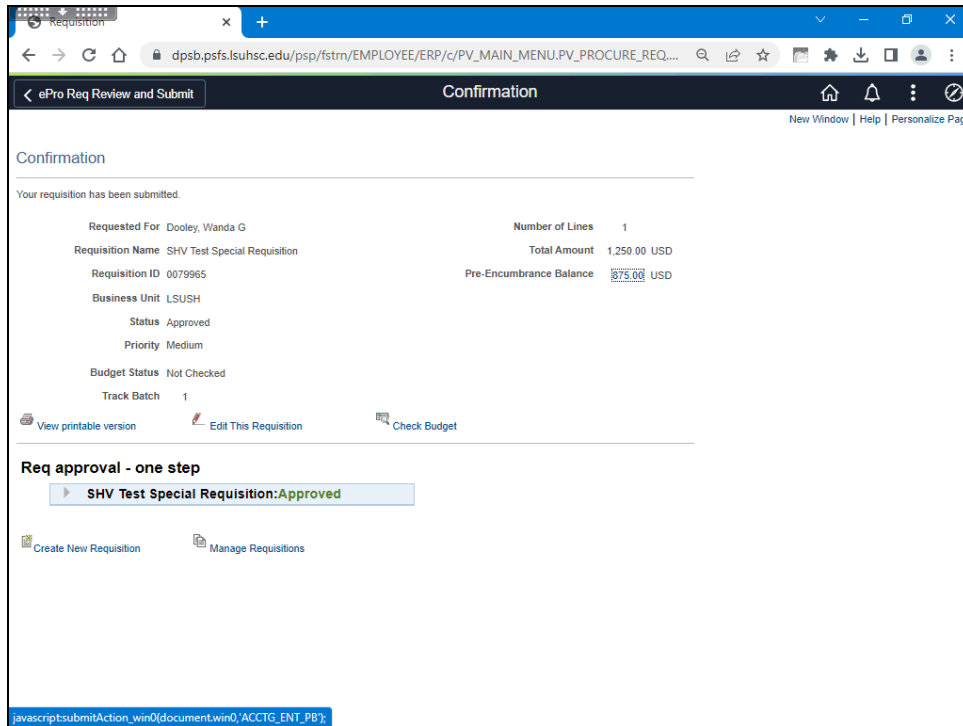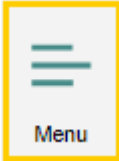
Step	Action
13.	The Confirmation page displays.
14.	This completes *Find/Edit a Save for Later Requisition*. **End of Procedure.**

Add Comments and Attachments

Procedure

In this topic you will learn to **Add Comments and Attachments**.

NOTE: Comments and attachments can be added to the requisition on the Checkout page for <u>new</u> requisitions or on the Edit Requisition page for <u>existing</u> requisitions.

Step	Action
1.	Click the **Main Menu** link.
2.	Click the **eProcurement** link.
3.	Click the **eProcurement** link.

Step	Action
4.	In this example, the user will add comments on the Edit Requisition page by navigating through the Manage Requisition page. *NOTE: For new requisitions, navigate NavBar > eProcurement > Requisition, add items to the cart, and select the Checkout button to access the Checkout page.* Click the **Manage Requisitions** link. Manage Requisitions
5.	Search for the requisition you wish to add comments and/or attachments. Click the button to the right of the **Line 1 Select Action** field. ⌄
6.	Click the **Edit** link. Edit
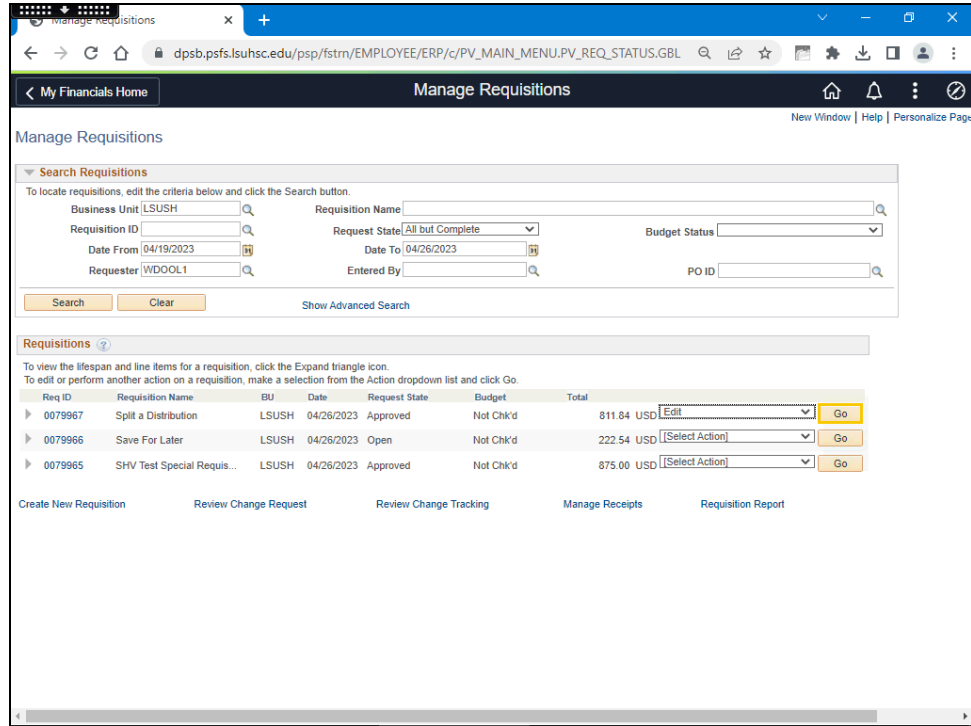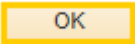
Step	Action
7.	Click the **Go** button.
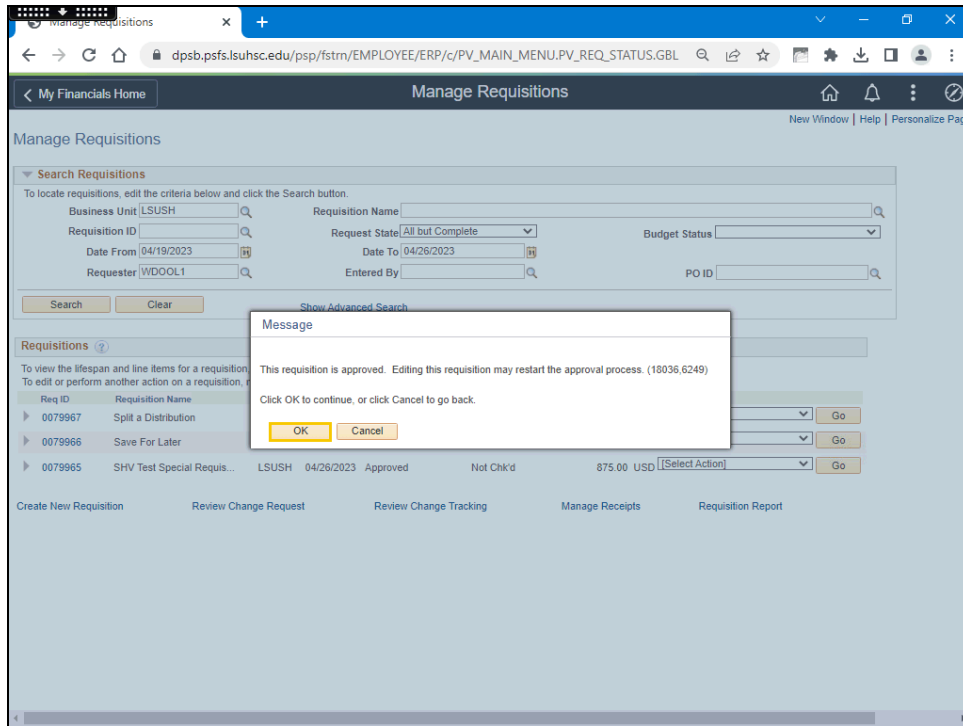
Step	Action
8.	Click the **OK** button. OK

Step	Action
9.	**Adding Header Comments and Attachments** Clicking on the "**Display Comment Text in Modal Window**" button at the top right corner of the text box will open a popup with a much larger text area for easier editing. Click the **Display Comment Text in Modal Window** button.
10.	Enter the desired information into the **ePro Requisitions** field. Enter "**These are the test comments for the ePro - TEST Add Comments and Attachments Requisition.**".

Training Guide
Managing eProcurement Requisitions

Step	Action
11.	Click the **Return** button. ![Return]
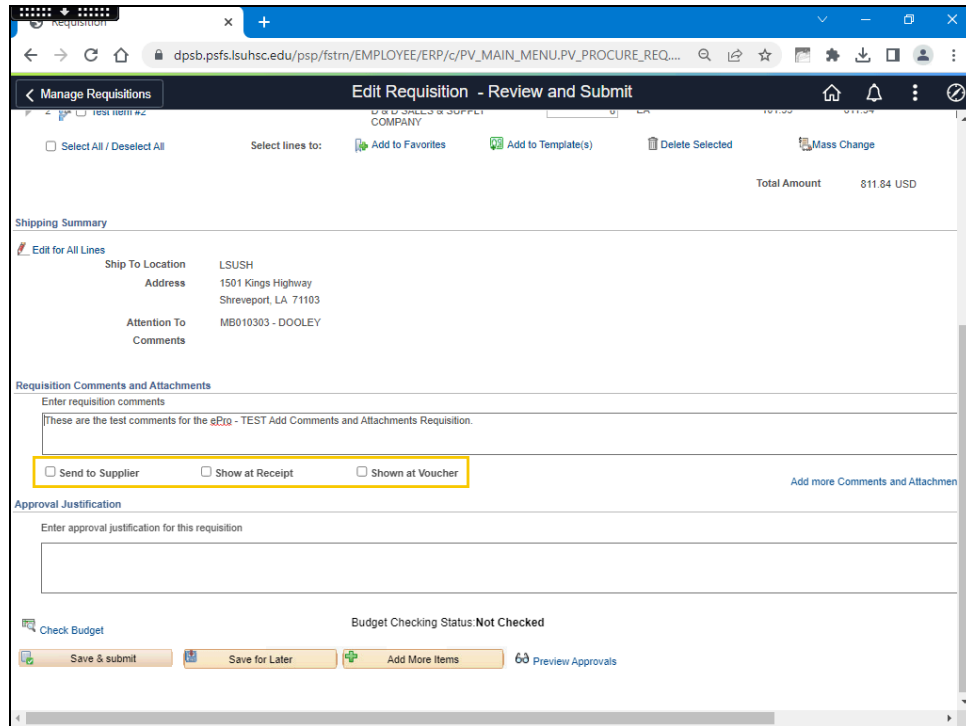
Step	Action
12.	There are also checkbox options to send the comments to the *Supplier*, to *Show on the Receipt*, and to *Show on the Voucher*.
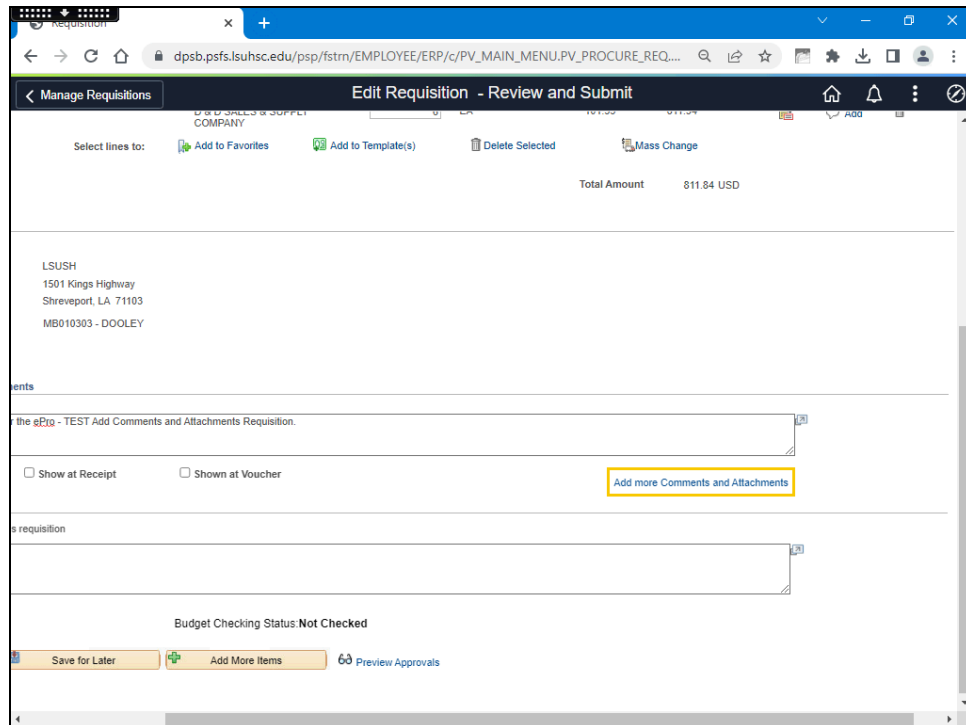
Step	Action
13.	Opening the modal window will also display the same text. To enter more comments and add attachments, click the **Add More Comments and Attachments** link. Add more Comments and Attachments

Step	Action
14.	A new window will open displaying the **Header Comments**. Notice that the original comment is displayed as the first comment. To add more comments, click on the **+** icon. Click the **Add a new row at row 1 (+)** link. +
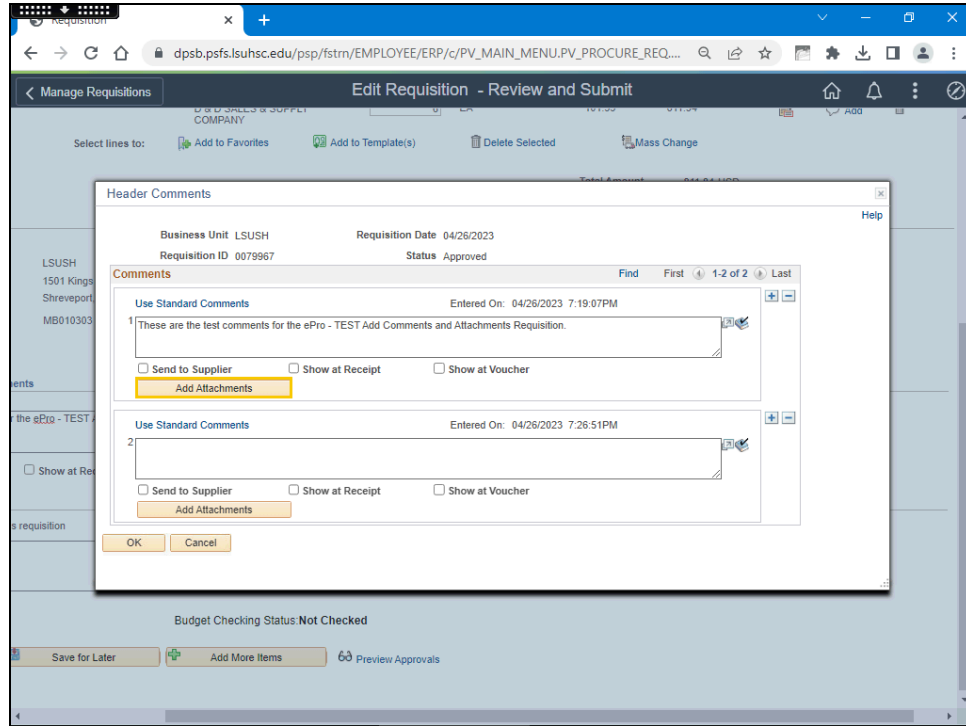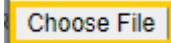
Step	Action
15.	The new comment will be Comment 2. Attachments can be added to individual comment boxes. Click the **Add Attachments** button for Comment 1. Add Attachments
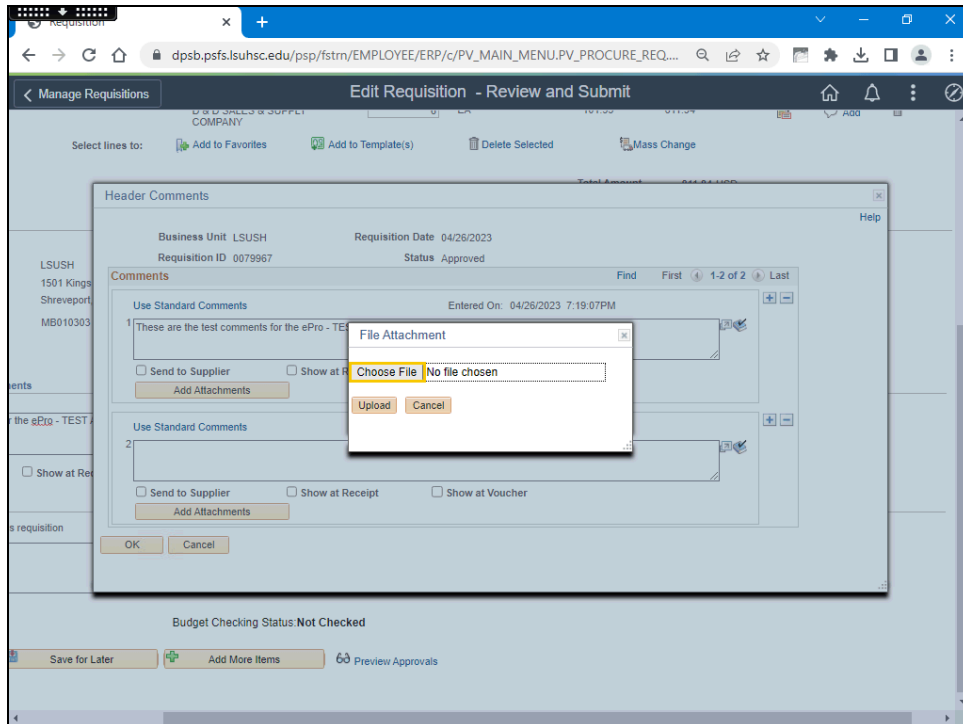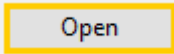
Step	Action
16.	Choose the file location for the attachment.
	Click the **Choose File** button.
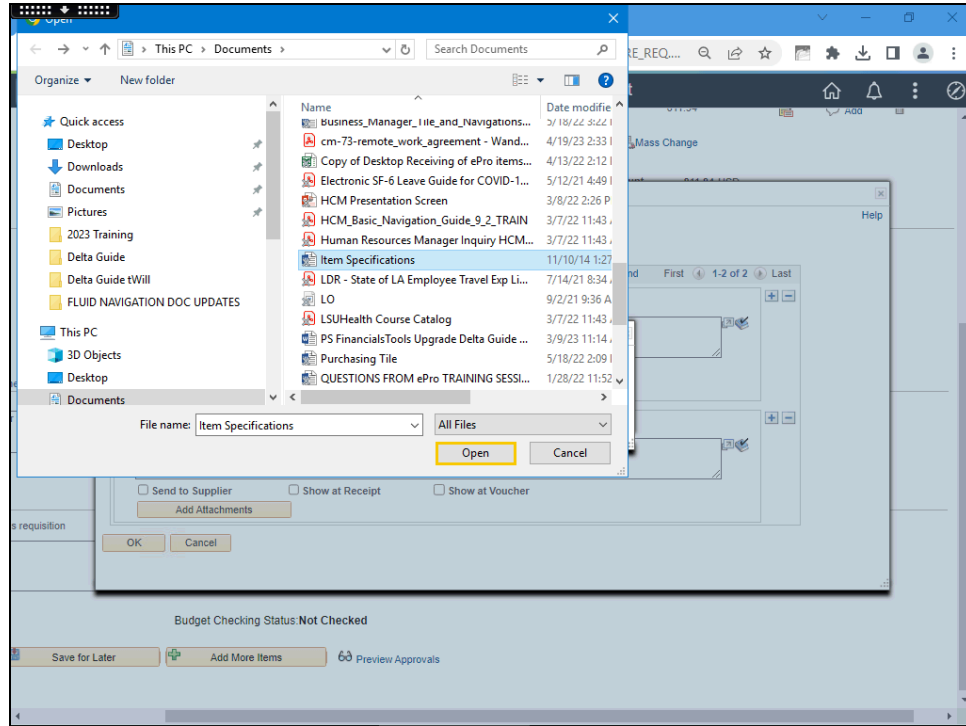
Step	Action
17.	Select the desired file to attach. Click the **Open** button. ![Open]
18.	Click the **Upload** button. ![Upload]
19.	The Attachment can be viewed for validity. Click the **View** button. ![View]
20.	The File Attachment is displayed.
21.	Close the processing window. Click the **X** button. ![X]

Step	Action
22.	Close the processing window. Click the **X** button.
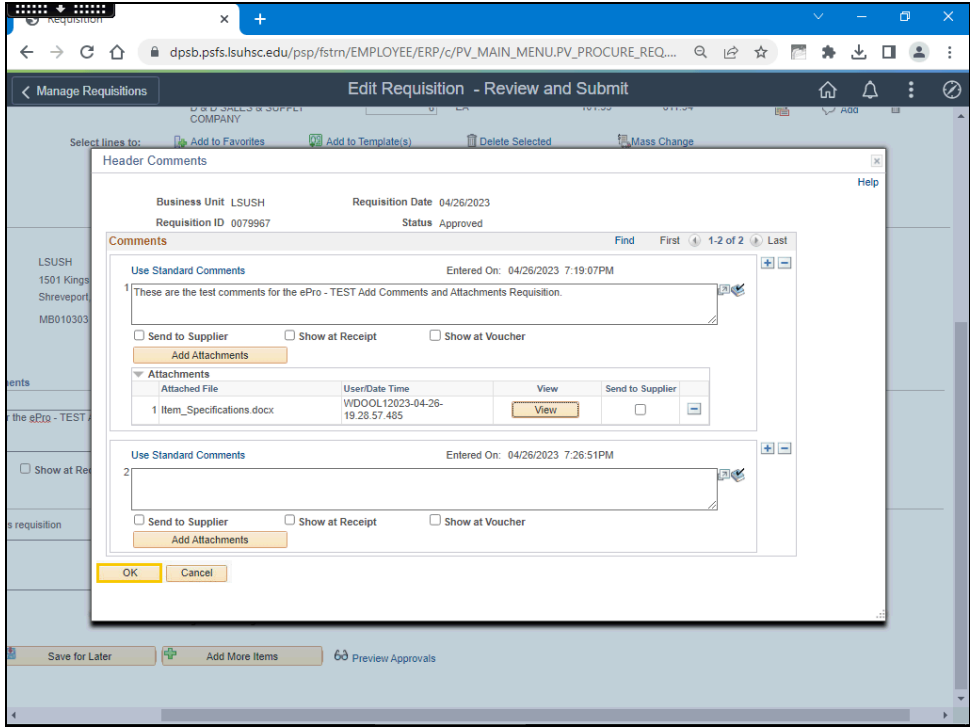
Step	Action
23.	Details of the attachment are now displayed under Comment 1. Click the **OK** button.
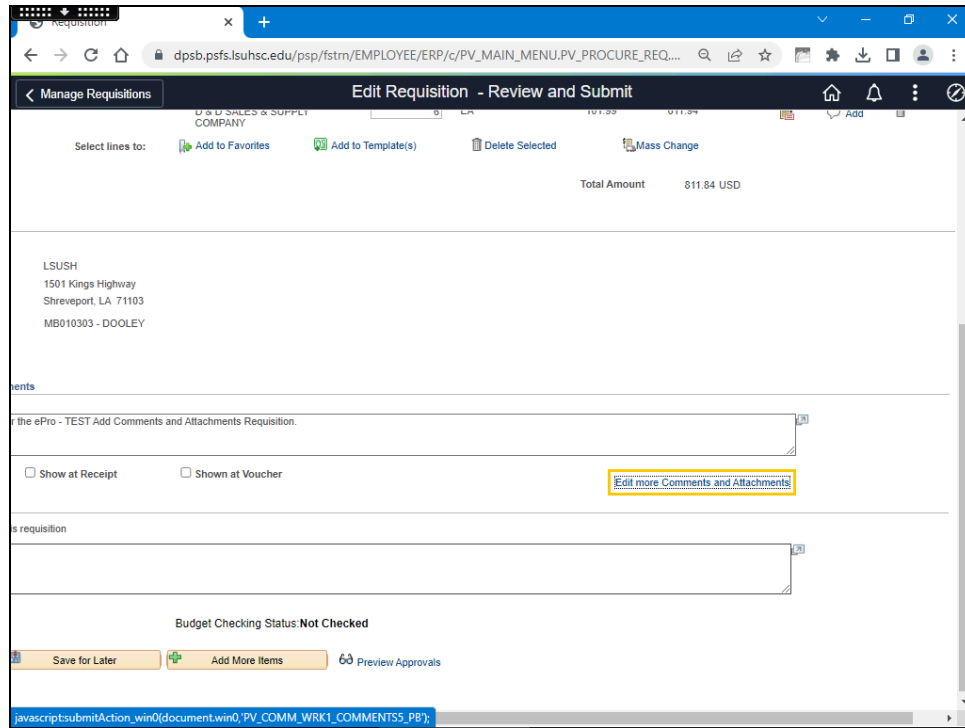
Step	Action
24.	After Comments have been added you will notice the link now reads Edit instead of Add more Comments and Attachments. Click the **Edit More Comments and Attachments** link. Edit more Comments and Attachments

Step	Action
25.	**Adding Line Comments and Attachments** On the *Checkout* or *Edit Requisition* page, comments and attachments can also be added on the requisition line. Entering these comments works similarly to the *Header Comments*. To add line comments, click on the Comment bubble icon at the end of line 1. Click the **Comments/Add** link.
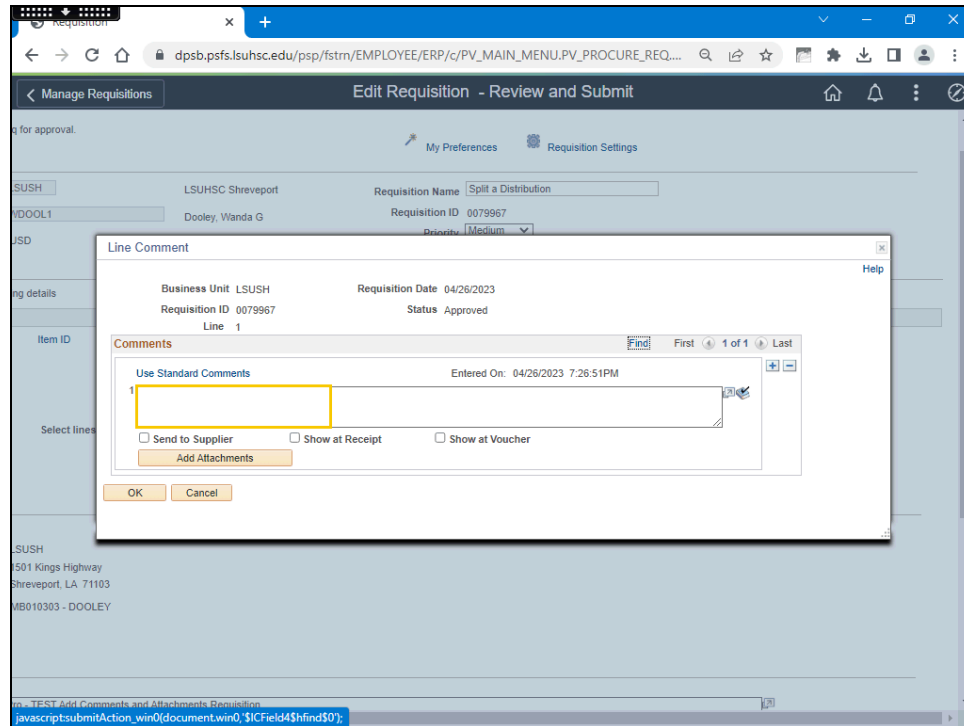
Step	Action
26.	A new window will open displaying the Comment 1.

Enter the desired information into the **Line Comments** field. Enter "**These are the test comments for the ePro - TEST Adding Line Comments and Attachments to a Requisition.**". |
| 27. | There are also options to *Send to Supplier*, *Show at Receipt*, and *Show at Voucher*. Attachments may also be added. |
| 28. | The comment entered can be spell checked.

Click the **Spell Check** link.

 |

Step	Action
29.	If there is a perceived misspelled word it will take you to a screen where you can pick the correct spelling and then click **OK**. If there are no misspellings a system message will state "**No Misspellings found**".
	In this example, the highlighted word is not in the dictionary, but the spelling is correct. Therefore, we will not change the spelling of the highlighted word.
	Click the **Ignore** button.
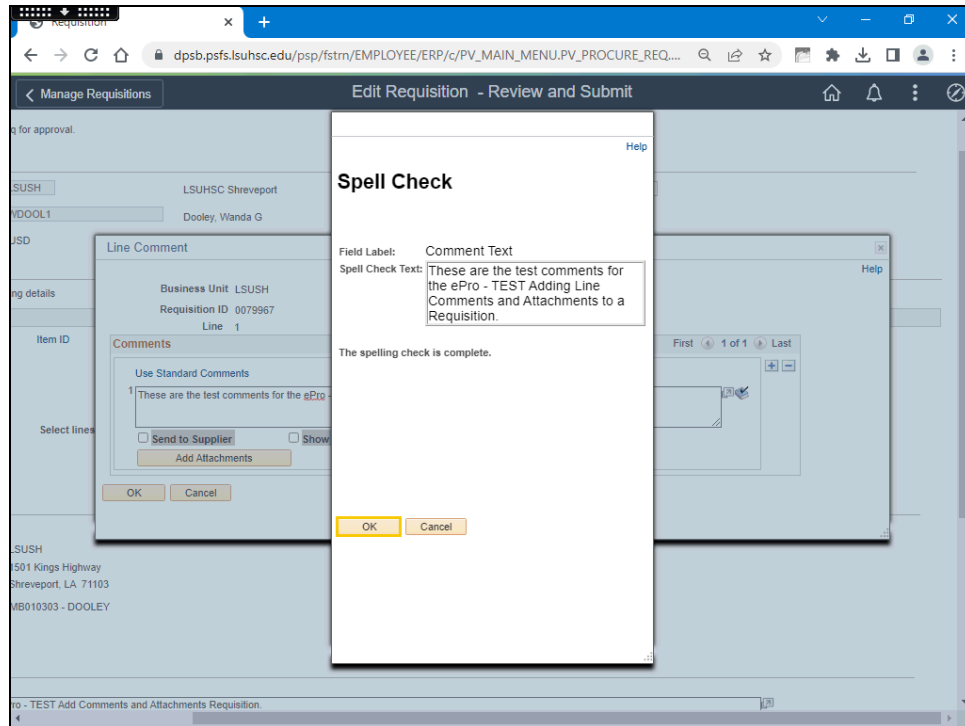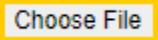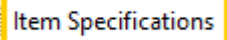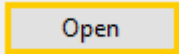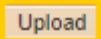
Step	Action
30.	Click the **OK** button. OK
31.	Attachments can also be added to individual line comments. Click the **Add Attachments** button. Add Attachments
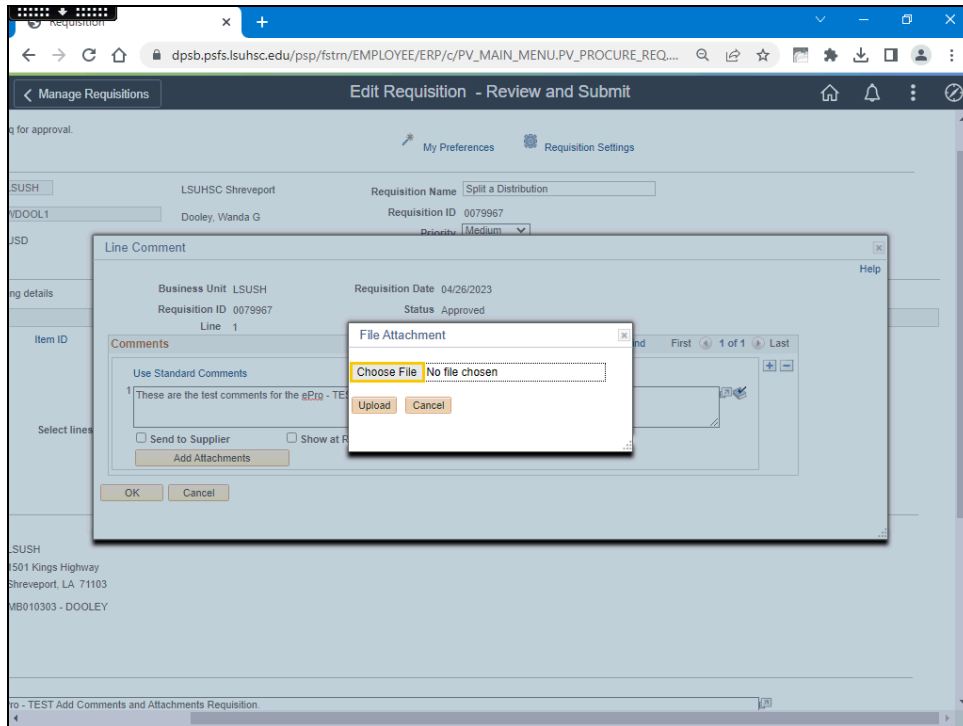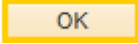
Step	Action
32.	Click the **Choose File** button. Choose File
33.	Select the desired file. Click the **File Name** link. Item Specifications
34.	Click the **Open** button. Open
35.	Click the **Upload** button. Upload
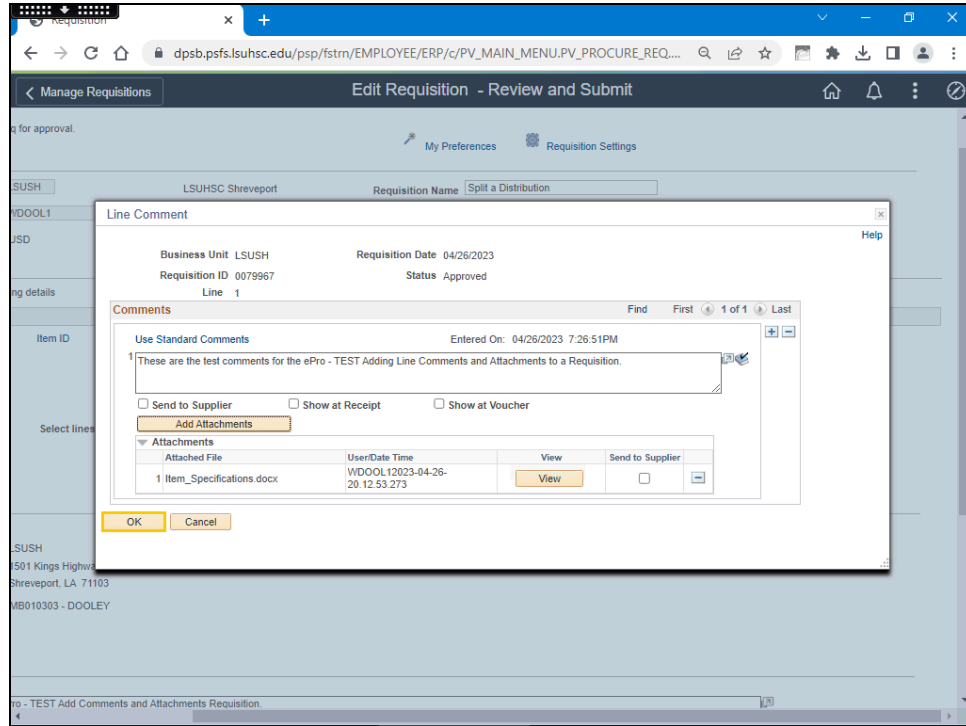
Step	Action
36.	Click the **OK** button.
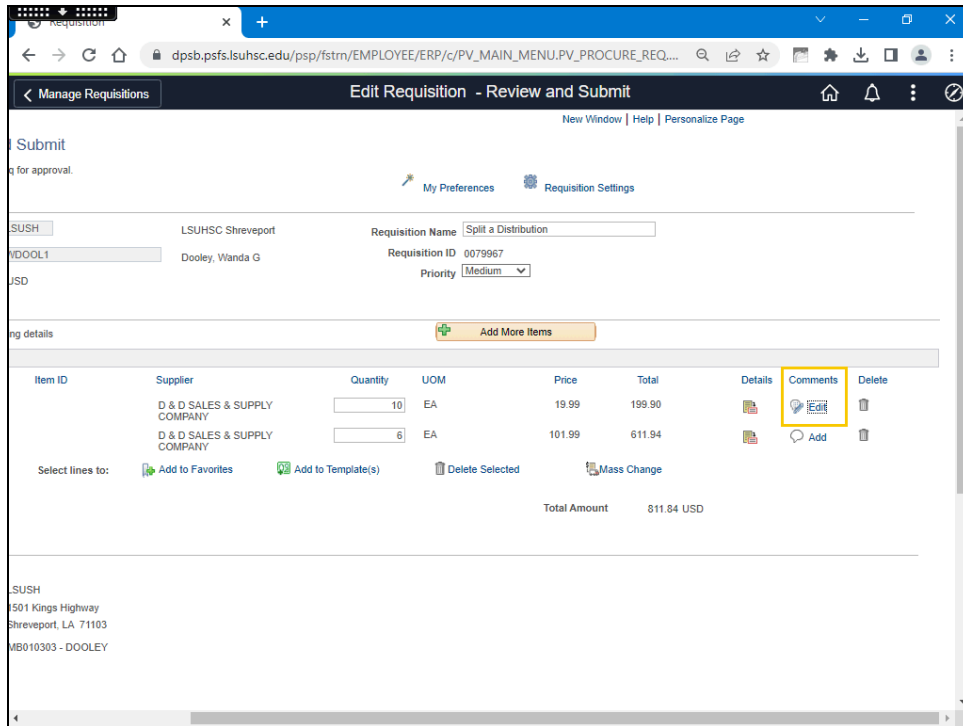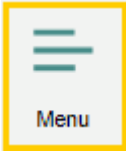
Step	Action
37.	Now that comments have been added, the **Comment** bubble now reads *Edit* instead of *Add*.
38.	This completes *Add Comments and Attachments*. **End of Procedure.**
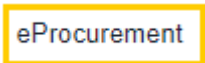
Copy a Requisition

Procedure

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

Step	Action
1.	Click the **Main Menu** link.
2.	Click the **eProcurement** link.
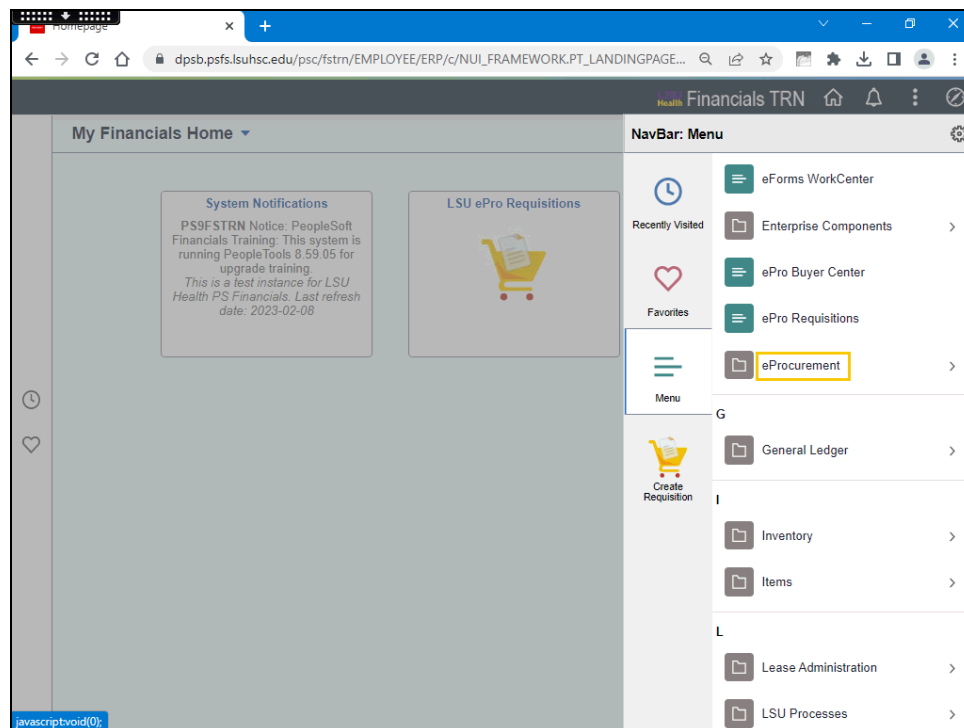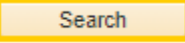
Step	Action
3.	Click the **Manage Requisitions** link.

Step	Action
4.	Click the **eProcurement** link. Manage Requisitions
5.	The **Date From** field may need to be changed to search for older requisitions. In this example the date range is going to be expanded to a wider date range. Enter the desired information into the **Date From** field. Enter "**04/01/2023**".
6.	Enter in the requisition ID to be copied. If you don't know the requisition ID you can click the magnifying glass next to the requisition ID field and search by Requestor User ID. If you know the Requisition ID enter the desired information into the **Requisition ID** field. Enter "**0072075**".
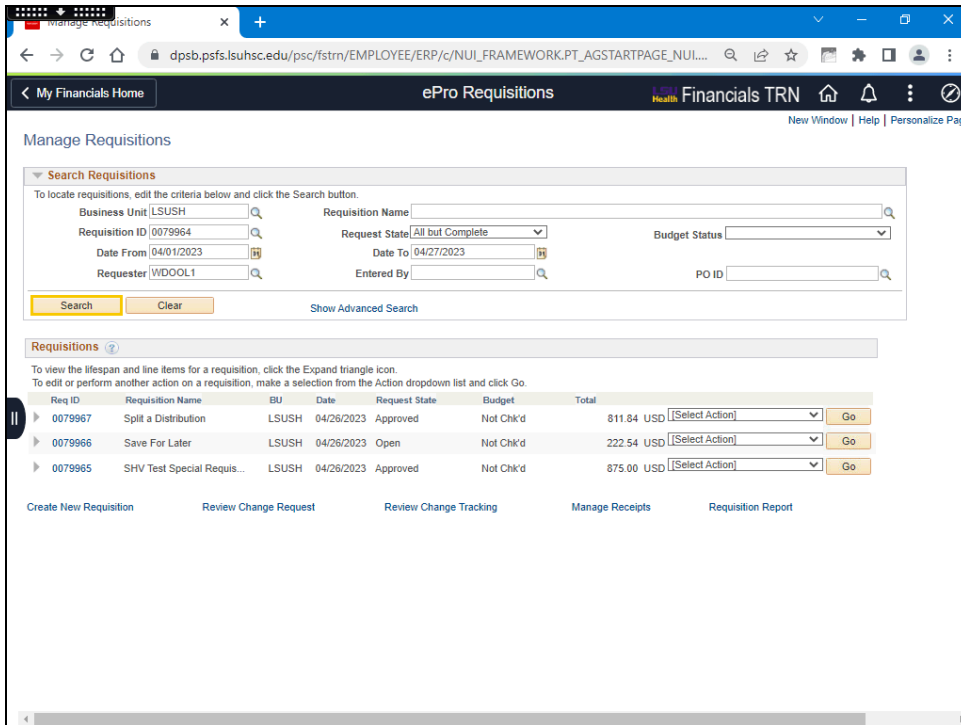
Step	Action
7.	Click the **Search** button. Search

Step	Action
8.	The desired requisition will display at the bottom of the screen.
	Click the button to the right of the **Select Action** field.
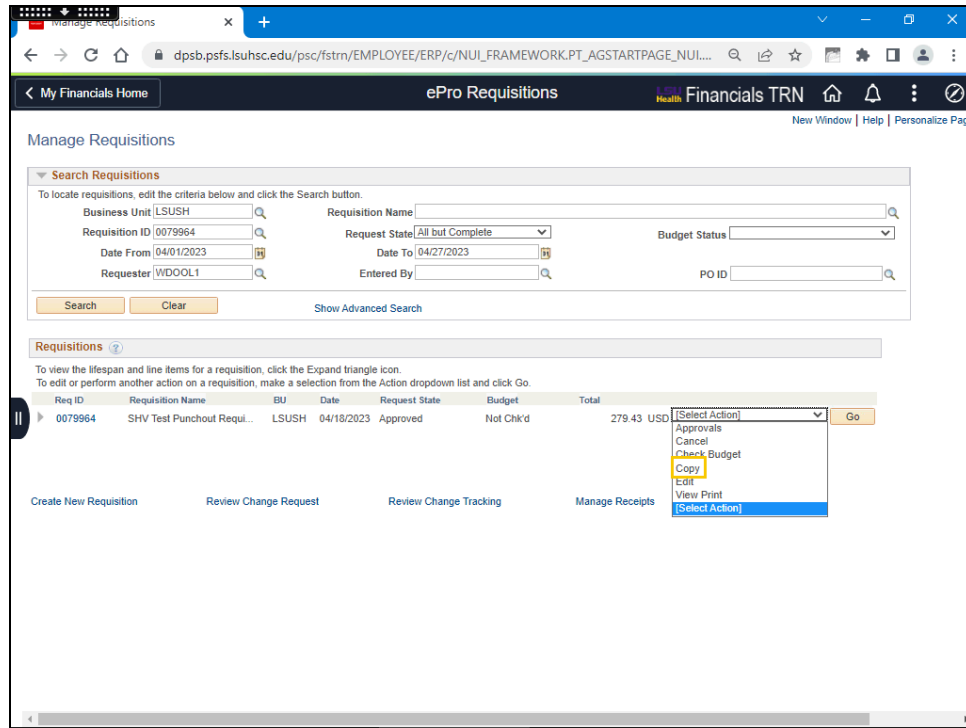
Step	Action
9.	Click the **Copy** list item.
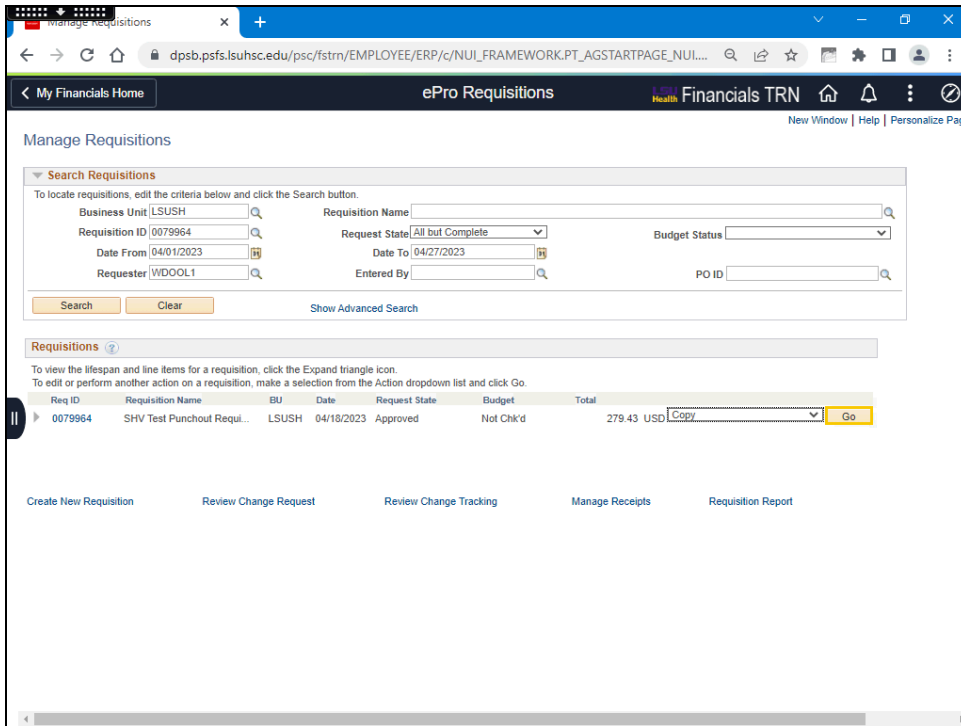
Step	Action
10.	Click the **Go** button.

Step	Action
11.	**The Checkout - Review and Submit page will display.** On this page the Schedules and Distributions of the requisition lines can be modified. To access them, click on the Expand Requisition Lines arrow on the left side of the Line Item. Click the button to the left of the **Expand Requisition Lines** field. ▶
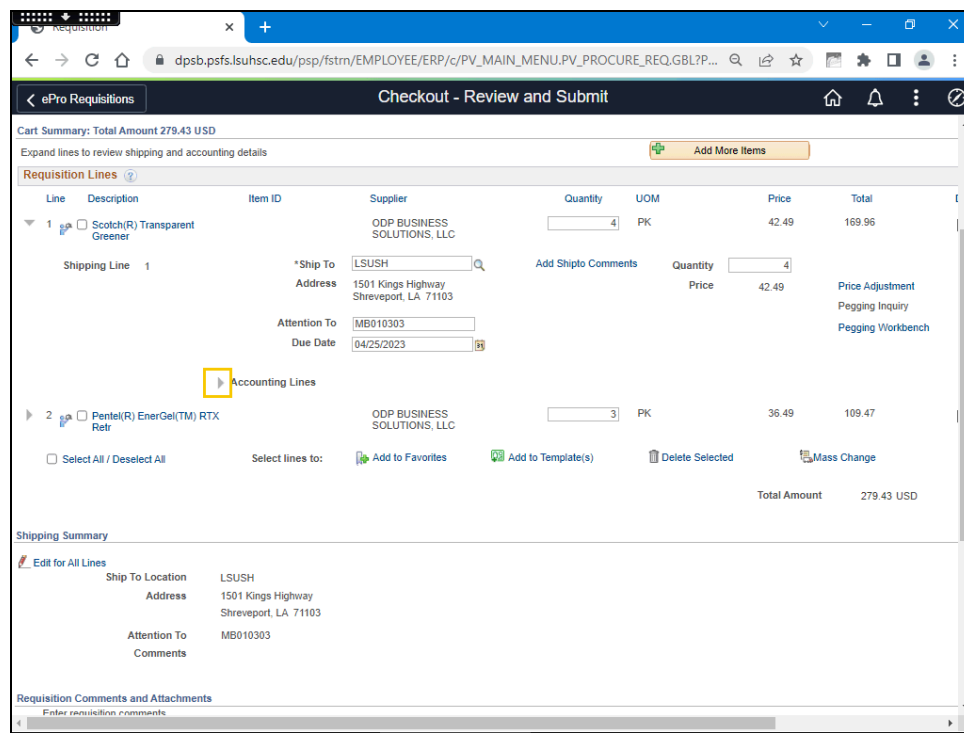
Step	Action
12.	Click the button to the right of the **Expand Accounting Lines** field. ▶
13.	Change the necessary information for the new requisition.
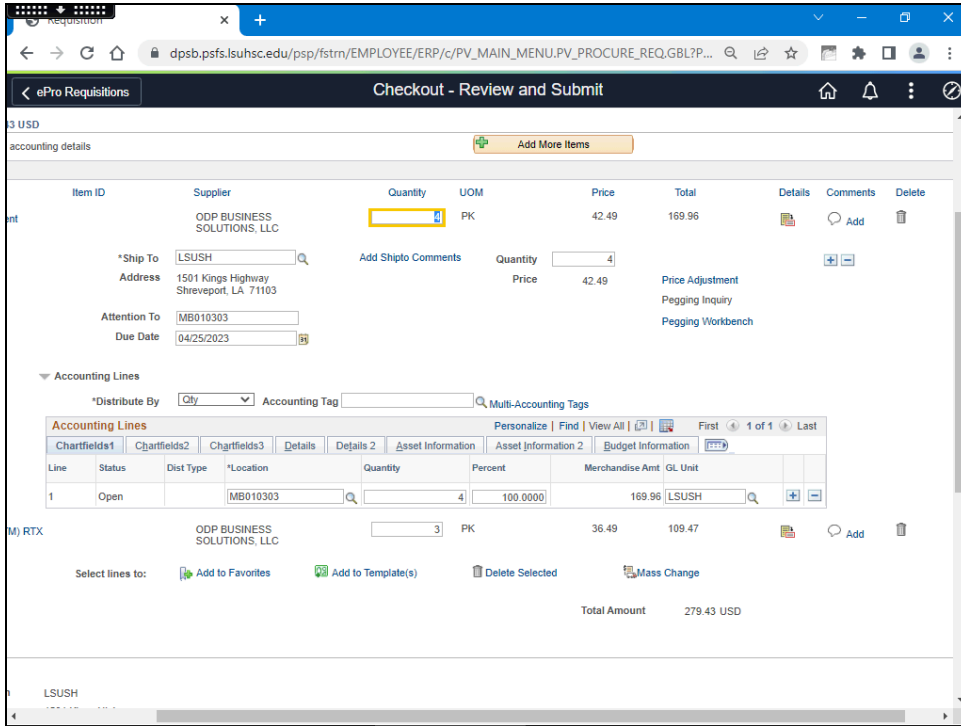
Step	Action
14.	In this example, the Quantity has been changed.
	Enter the desired information into the **Quantity** field. Enter "**6**".
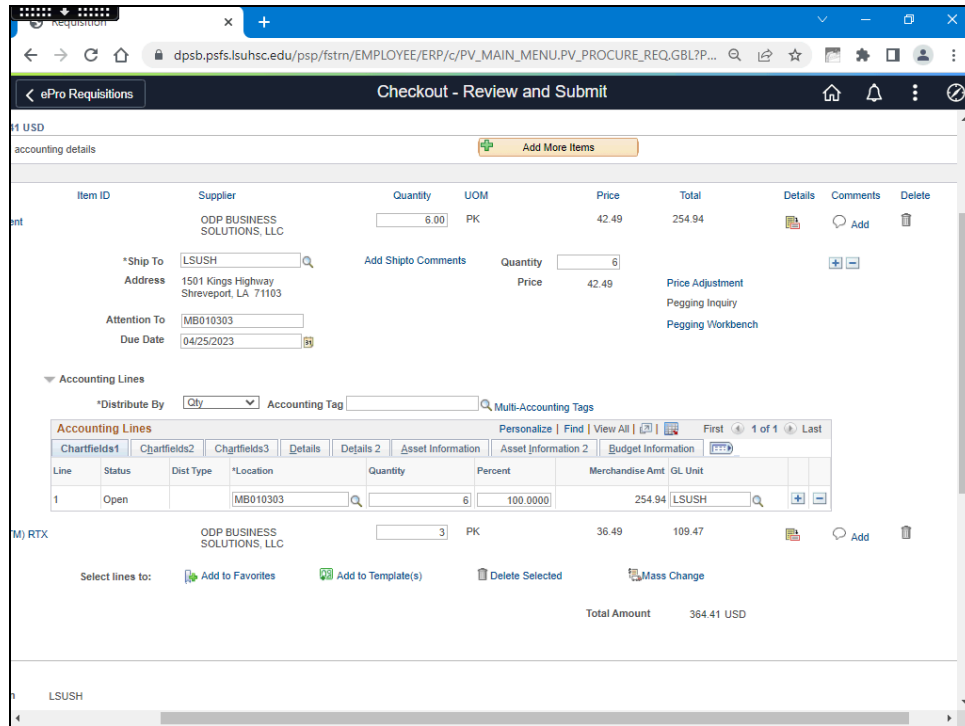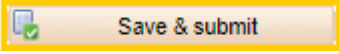
Step	Action
15.	The Distribution will automatically split based on the percentage distribution indicated.
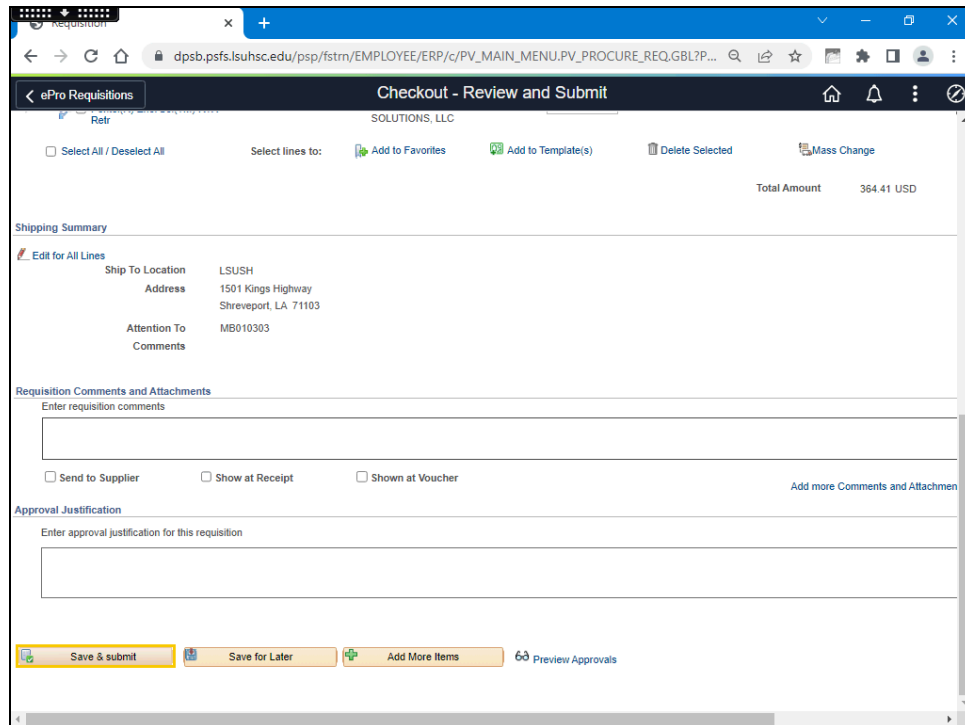
Step	Action
16.	If all schedules and distributions are ready, scroll to the bottom of the page. Click the **Save & Submit** button. Save & submit
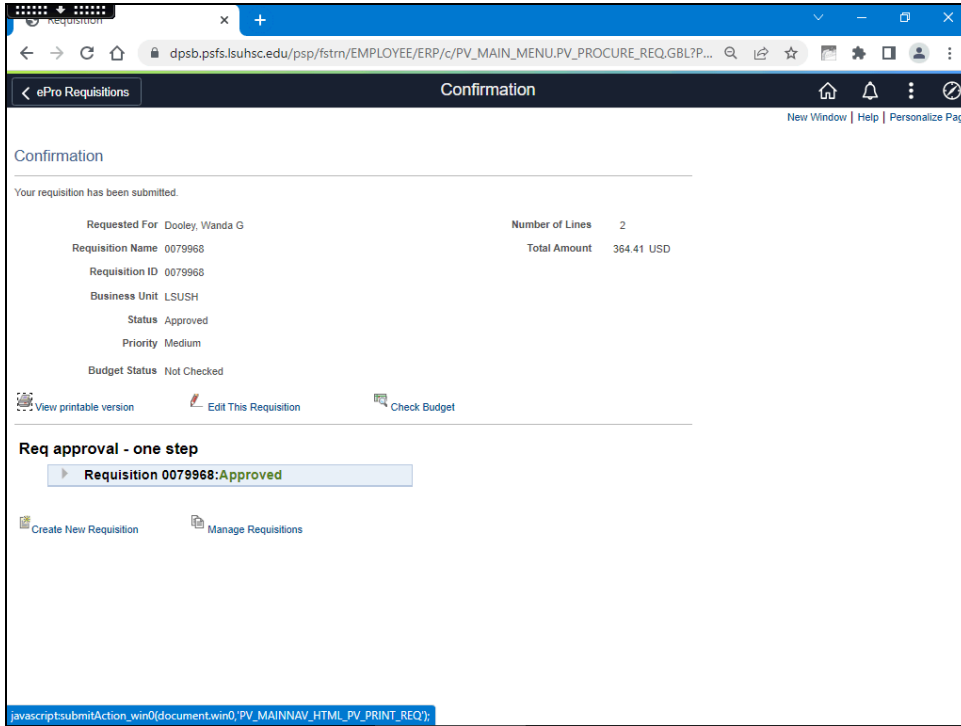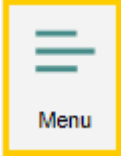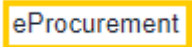
Step	Action
17.	**The Requisition Confirmation page will display.** The requisition will be submitted for approval, and once approved, it will have to be Budget Checked before it can be sourced to a Purchase Order.
18.	This completes *Copy a Requisition*. **End of Procedure.**

Cancelations

Cancel a Requisition
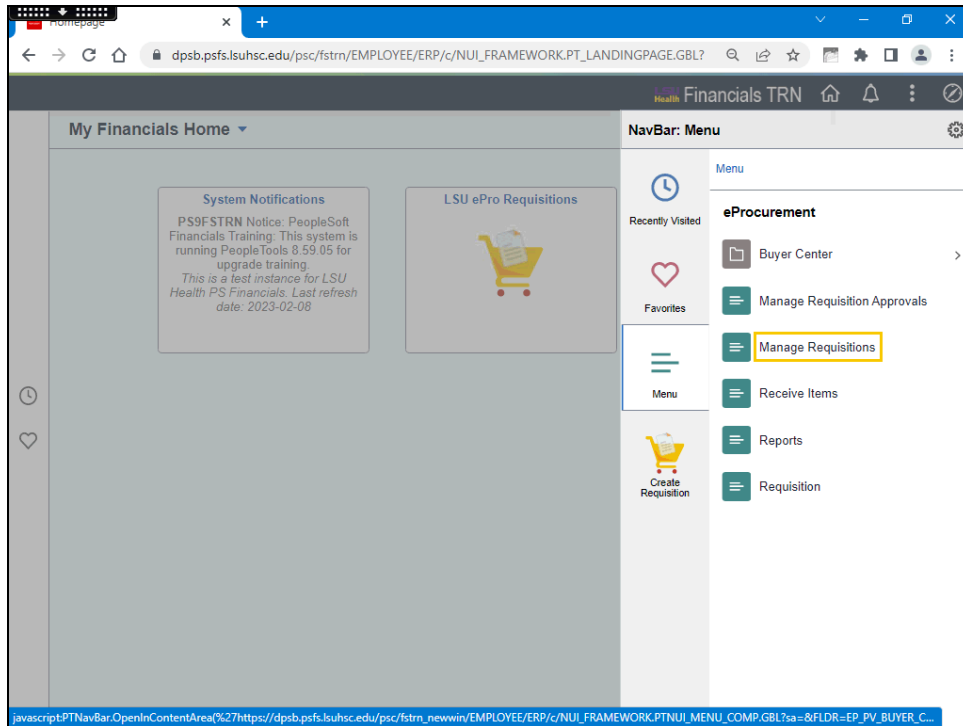
Procedure

In this topic you will learn to **Cancel a Requisition**.
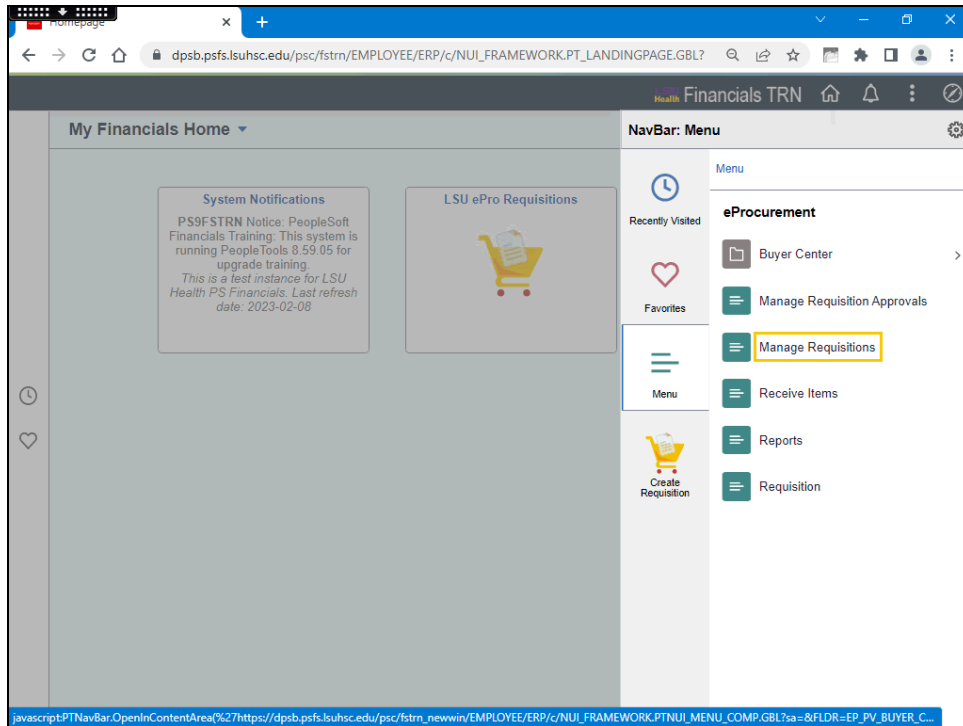
Step	Action

1.	*NOTE: A requisition line or a requisition can be canceled if:*
	  1. The requisition is not on hold.
	  2. You are authorized to cancel and/or update requisitions on the User Preferences.
	  3. You are authorized to cancel and/or update requisitions for a specified requester on the User Preferences.
	  4. No requisition lines, or the specific line to be canceled, have been sourced to a PO or RFQ.

2.	Click the **NavBar** link.
3.	Click the **Menu** link.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Manage Requisitions** link. Manage Requisitions

Step	Action
6.	Click the button to the right of the **Line 1 Select Action** field. ![dropdown button]
7.	Click the **Cancel** link. Cancel
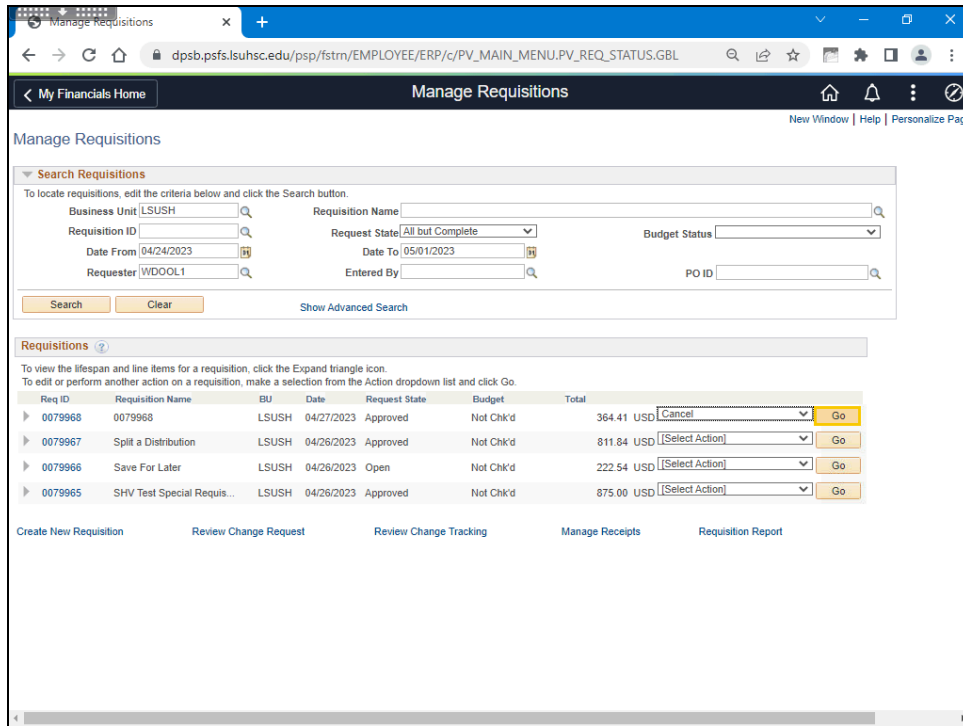
Step	Action
8.	Click the **Go** button. Go
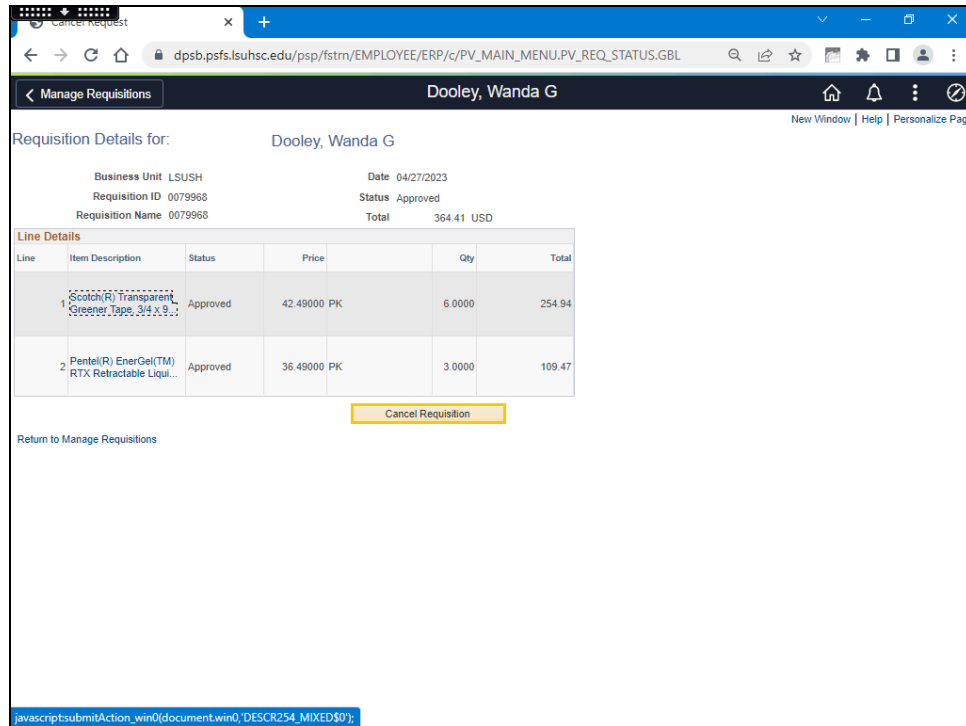
Step	Action
9.	The **Requisition Details** screen will display. Once the requisition has been canceled, no further changes can be made to the requisition. Click the **Cancel Requisition** button. Cancel Requisition
10.	The **Budget Status** updates to **Valid**.
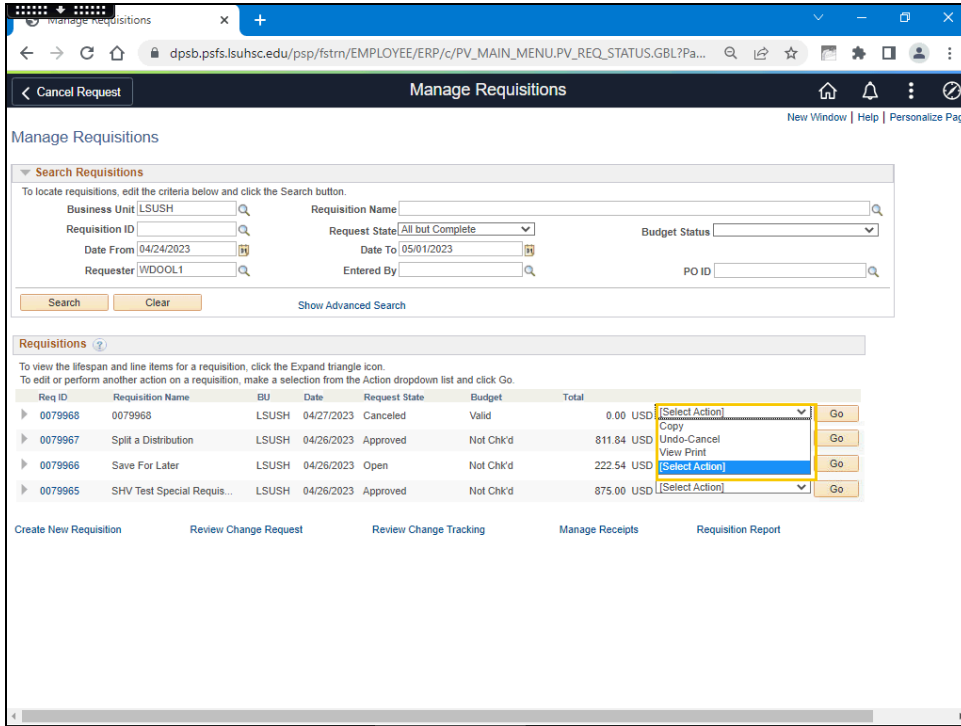
Step	Action
11.	Canceled requisitions can still be *copied* or *printed* from the **Manage Requisitions** page. All lines from the cancelled requisition are copied and made active on a new requisition.
12.	This completes *Cancel a Requisition*. **End of Procedure.**
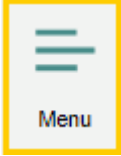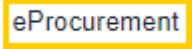
Cancel a Requisition Line

Procedure

In this topic you will learn to Cancel a Requisition Line.

*N**OTE: A requisition line or a requisition can be canceled if:***
  *1. **The requisition is not on hold.***
  *2. **You are authorized to cancel and/or requisitions on the User Preferences.***
  *3.   **You are authorized to cancel and/or update requisitions for the requester on the User***
Preferences.
  *4. **No requisition lines or the specific line to be canceled have been sourced to a PO or RFQ.***

Step	Action
1.	*N**OTE: A requisition line or a requisition can be canceled if:*** *1. **The requisition is not on hold.*** *2. **You are authorized to cancel and/or update requisitions on the User Preferences.*** *3. **You are authorized to cancel and/or update requisitions for a specified requester on the User Preferences.*** *4. **No requisition lines, or the specific line to be canceled, have been sourced to a PO or RFQ.***
2.	Click the **NavBar** link.
3.	Click the **Menu** link.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Manage Requisitions** link. Manage Requisitions

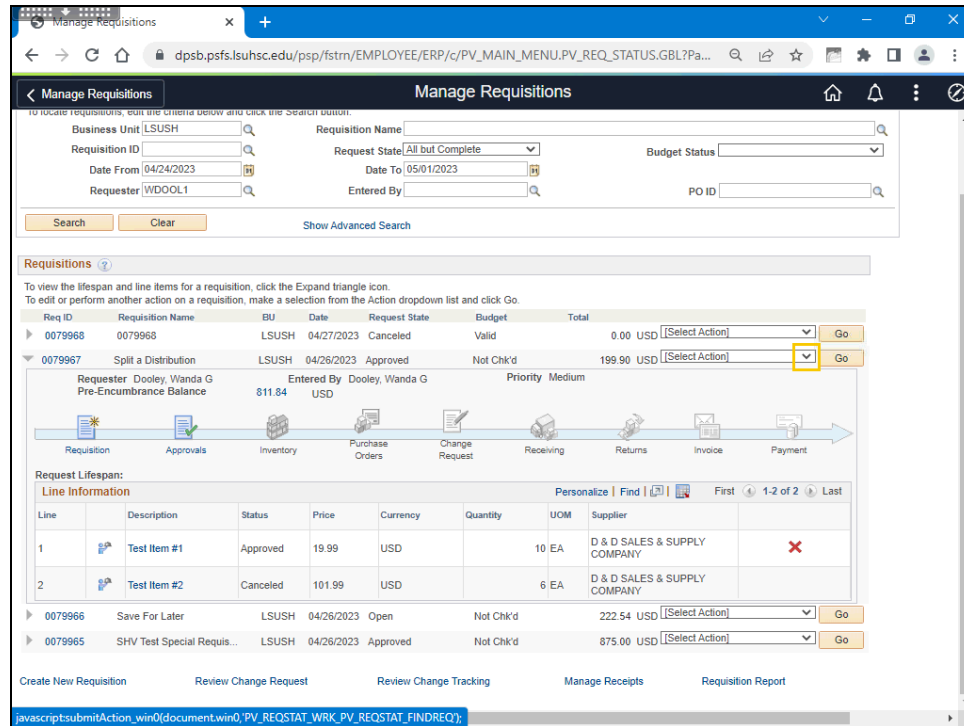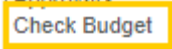| Step	Action
6.	Expand the requisition information to see more details; click the button to the right of the **Requisition Line 3 Information** field. ▶
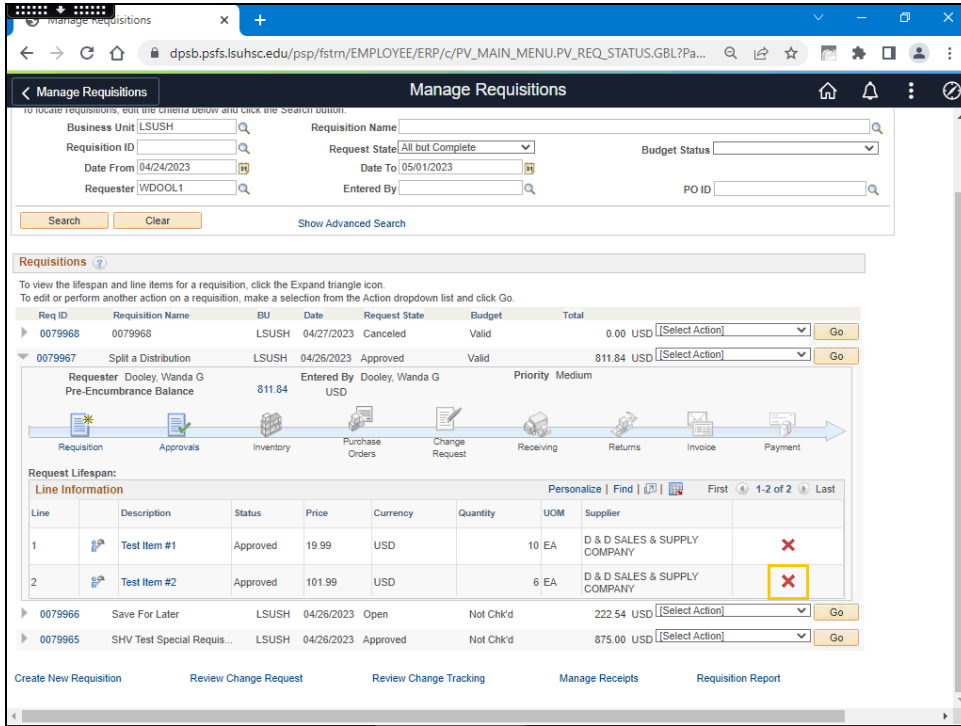
Step	Action
7.	To cancel a line on a requisition, click the red **X** at the end of the line to be canceled. In this example, line 2 will be canceled. Click the **X** button.
8.	A confirmation message will display. Click the **OK** button.

Step	Action
9.	Line 2 will update to a **Canceled** Status and the red **X** for that line will no longer be available. However, the *Budget Status* has changed from **Valid** to **Not** **Checked**. The *Budget Status* will need to be updated to release the encumbrance. Click the button to the right of the **Line 2 Select Action** field.
10.	Budget check the requisition by selecting the "**Check Budget**" item from the Drop-down menu. Click the **Check Budget** link.
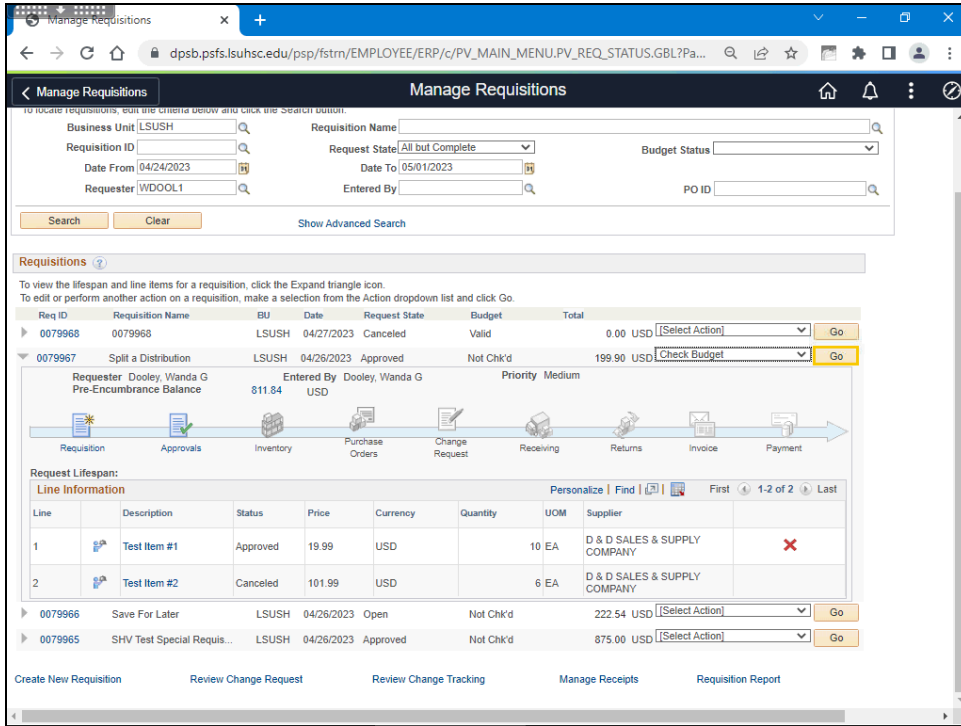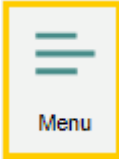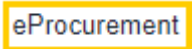
Step	Action
11.	Click the **Go** button. Go
12.	The **Budget Status** updates to **Valid**.
13.	A requisition with cancelled lines can still be *copied* or *printed* from the **Manage Requisitions** page. However, only the active lines on the requisition will be copied or printed.
14.	This completes the *Cancel a Requisition Line*. **End of Procedure.**

Budget Check a Requisition

Budget Check a Requisition

Procedure

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

Step	Action
1.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.

Step	Action
4.	Click the **Manage Requisitions** link. Manage Requisitions

Step	Action
5.	Under the Requisitions section, click the arrow to the left of the **Line 2 Req ID Information** field. ▶
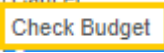
Step	Action
6.	This will display the **Request Lifespan** which graphically shows where the requisition is in the process. When there are colored icons, it indicates the stage has been completed. In this example, *Requisition* and *Approvals* are in color. The other icons are grayed out indicating that the requisition has not been sourced to a PO yet. This is because the requisition still needs to be Budget Checked successfully before it can be sourced to a PO. Above the **Request Lifespan** section, on the right side of the page you will see the "**Select Action**" option box and the **Go** button. Click the button to the right of the **Line 2 Select Action** field.

Step	Action
7.	The available actions are: **Approvals** - to view the approvals for the requisition **Cancel** - to cancel the requisition **Check Budget** - to run the budget check process **Copy** - to create a copy of the requisition **Edit** - to open the requisition for editing **View Print** - to print the requisition Click the **Check Budget** link.
8.	Click the **Go** button.
9.	The system will process the **Budget Check**. Notice that the processing icon spins in the top right corner of the screen. Once the process is completed, the **Budget Status** will change to *Valid*, *Warning*, or *Error*.
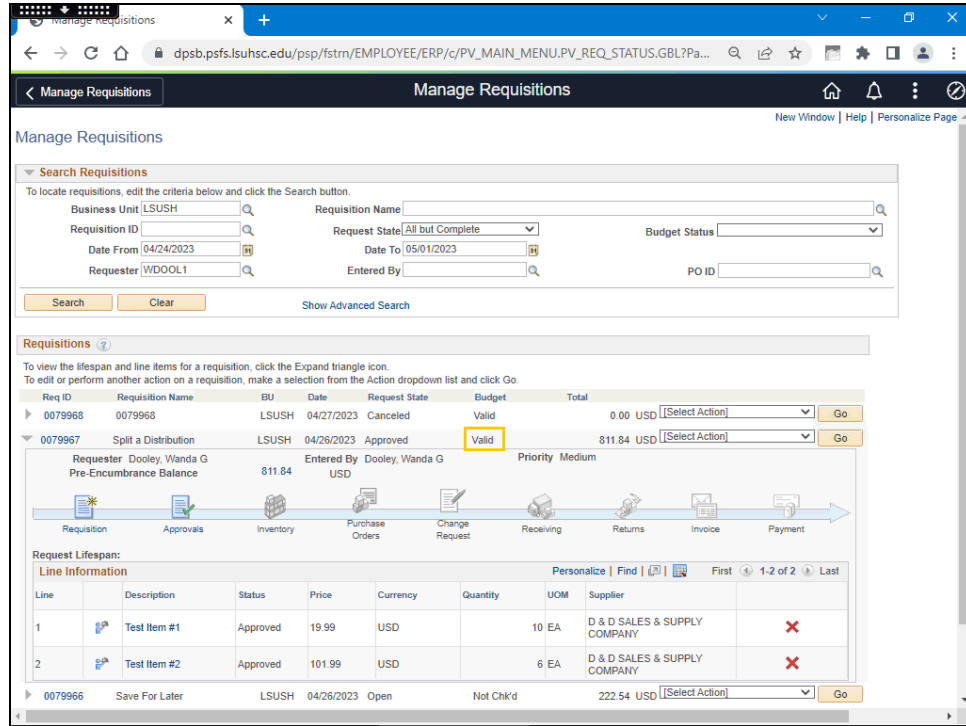
Step	Action
10.	Now that the status of the **Budget Status** is **Valid**, the requisition is available to be sourced to a Purchase Order.
11.	This completes *Budget Check a Requisition*. **End of Procedure.**
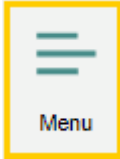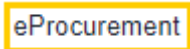
Inquiries

Conduct Requisition Searches in eProcurement

Procedure

In this topic you will learn how to **Conduct Requisition Searches in eProcurement**.

Step	Action
1.	In eProcurement, searching for requisitions can be done in the Manage Requisitions page. Requisitions created in eProcurement and also in the Purchasing module can be searched.
2.	Click the **NavBar** link.
3.	Click the **Menu** link.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Manage Requisitions** link.

Step	Action
6.	By default, the search will fill in the user's **User ID** and **Business Unit** in the search parameters, along with **dates** from the past week and the **Request State** of *All but Complete*.
7.	Recommended parameters used in *Search* are: • **Business Unit:** User's BU • **Requisition Name:** Blank • **Requisition ID:** Enter if known, otherwise leave blank • **Requisition State:** All but Complete • **Budget Status:** Blank • **Date From and To:** Narrow date range to refine search • **Requester:** Specific UserID if possible, otherwise blank would pull all user's requisitions • **Entered By:** Blank • **PO ID:** Enter if searching for requisition sourced to a specific PO
8.	Click in the **Show Advanced Search** field. Show Advanced Search

Step	Action
9.	Recommended *Advanced Search* parameters are: • **Item ID:** Blank • **Item Description:** Enter if a specific item description is known, otherwise leave blank • **Ship To:** Enter if known, otherwise leave blank • **Supplier Item ID:** Blank
10.	Click in the **Hide Advanced Search** field. Hide Advanced Search
11.	*NOTE: For this exercise, the parameters will remain as defaulted.* Click the **Search** button. Search
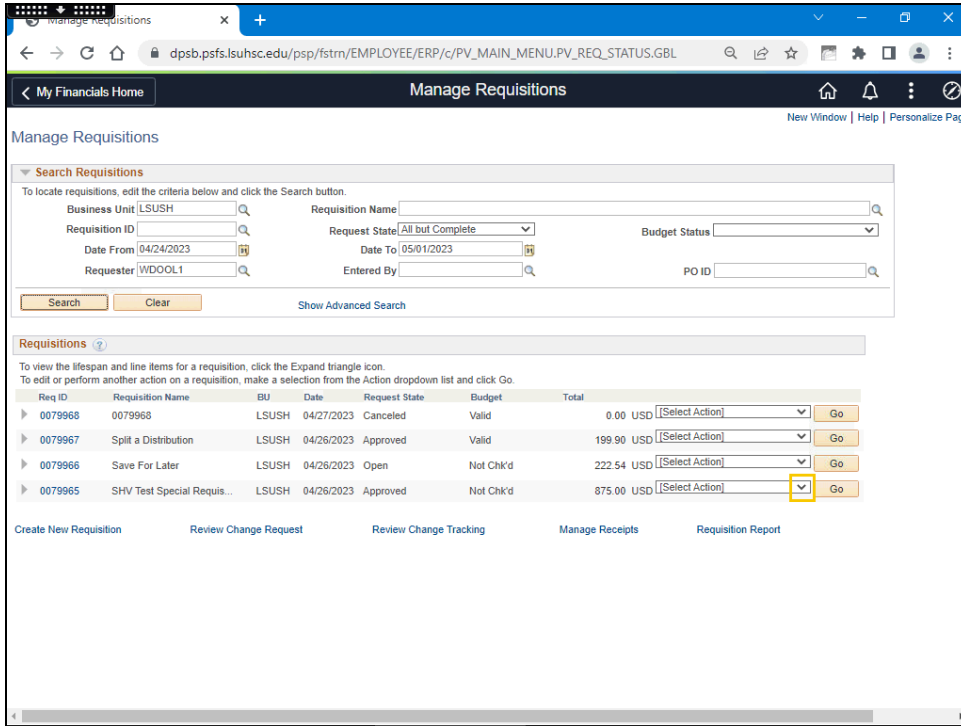
Step	Action
12.	After retrieving requisition search results, several actions can be performed on the requisition. Click the button to the right of the **Select Action** field.

Step	Action
13.	Available *Action* options are: • **Approvals:** View requisition approvals • **Cancel:** Cancel the <u>entire</u> requisition • **Copy:** Copy the requisition to a new one, which can then be edited • **Edit:** Edit the existing requisition. If edited, the requisition <u>must</u> be submitted for approval again. • **View Print:** View a printable version of the requisition
14.	This completes *Conduct Requisition Searches in eProcurement*. **End of Procedure.**
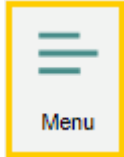
Inquire on a ePro Requisition

Procedure

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

Step	Action
1.	eProcurement provides a method to inquire on the status of a requisition to view the detailed information. It also provides the status within the life cycle of the requisition to purchase order, to voucher, and then payment.
2.	Click the **NavBar** link.
3.	Click the **Menu** link.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Manage Requisitions** link. Manage Requisitions
6.	In this example, the date range of **01/01/23 - 05/01/23** will be entered. The **Requester** will also be removed prior to searching. Enter the desired information into the **Date From** field. Enter "**010123**".
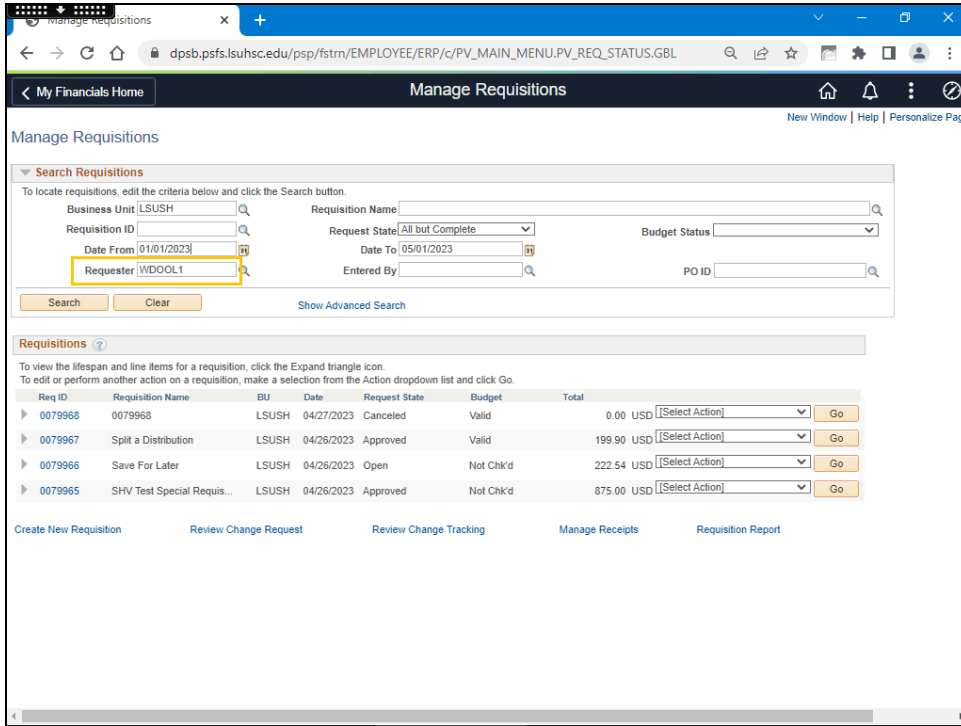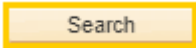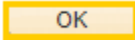
Step	Action
7.	The *Date To* will remain as defaulted. Highlight the Request ID and strike the **Delete** key on your keyboard. Press **[Delete]**.
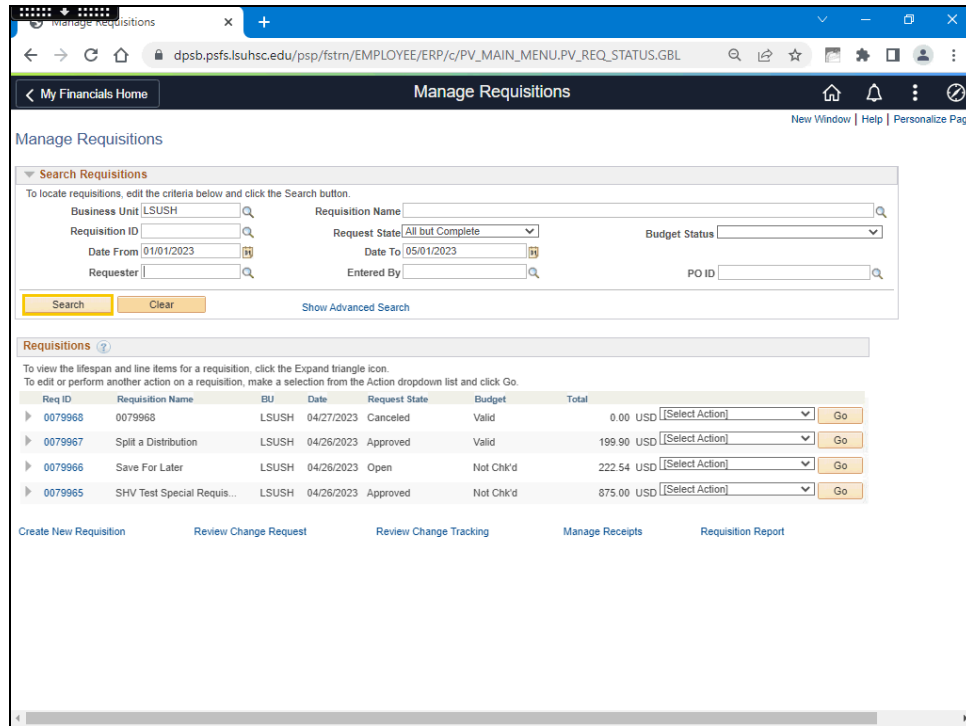
Step	Action
8.	Click the **Search** button. ![Search]
9.	A message displays stating the max scroll amount has been reached. Click the **OK** button. ![OK]

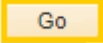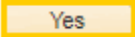| Step	Action
10.	A list of requisitions displays the most recent to oldest order. As you can see, there are a number of requisitions that may be scrolled through. There are several **Request States**: Approved, PO(s) Dispatched, Partially Received, Received, etc. Each line displays the **Budget Check** status as well.
11.	The **Action** list allows the user to choose an action such as edit, copy, view print, etc.
12.	In this example, the user will select requisition **0079946**. Click the **Expand Section for Req ID 0079946** button. ▶

Step	Action
13.	Icons in color are: Requisition, Approvals, and Purchase Orders indicating that the requisition has progressed into the life cycle. Users can select colored icons to view information associated with the document. Click the **Purchase Orders** button.
14.	The Purchase Order information for the requisition displays for review. Click the **Return to Manage Requisitions** link.
15.	Click the **Ok** button.
16.	Click the button to the right of the **(Select Action)** field.

Step	Action
17.	If the user wants to print the requisition, select the View Print option. Click the **View Print** list item. View Print
18.	Click the **Go** button. Go
19.	A message displays asking if you want to print with the distribution details. This will allow the chartstring information to print. Click the **Yes** button. Yes
20.	A new tab opens and the printable version of the requisition displays. To print the requisition, right-click anywhere in the requisition to get the print menu to display. Right-click the **Window**. Address: 1501 Kings Highway Shreveport LA 71103 United States
21.	Click the **Print** menu. Print... Ctrl+P
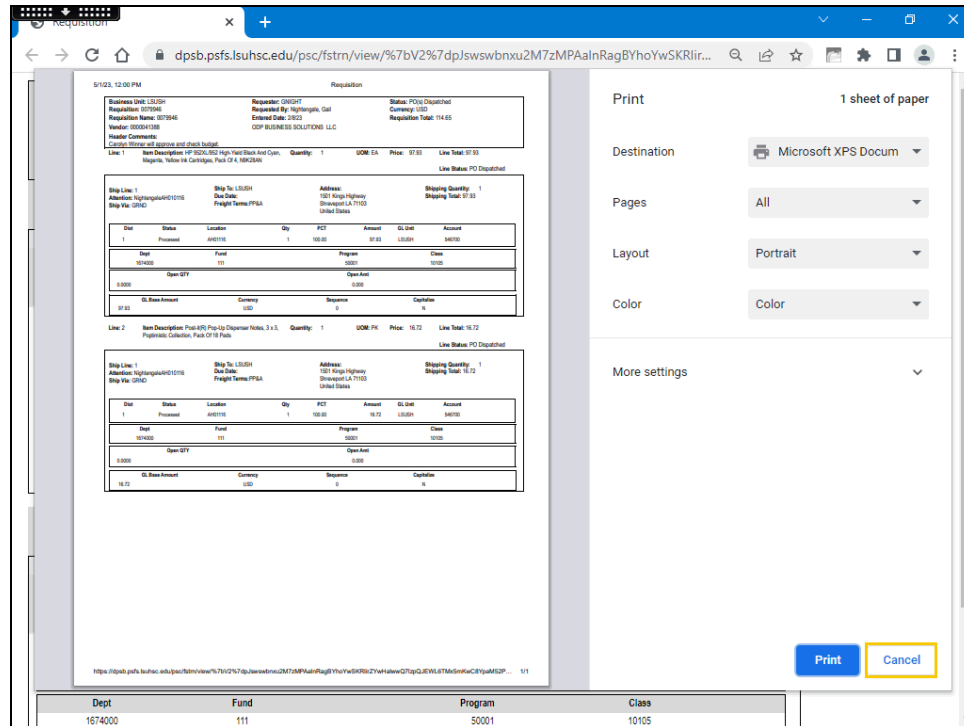
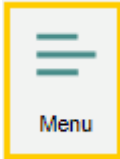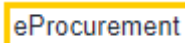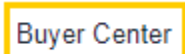| Step	Action
22.	The *Print Preview* displays. Generally, users would select the **Print** option. For **training purposes only**, click the **Cancel** button. Cancel
23.	Click the **Close** button on the *Requisition* tab. ✕
24.	Click the **Collapse Section for Req ID 0079946** button. ▼
25.	Review other requisitions as desired.
26.	This completes *Inquire on an ePro Requisition*. **End of Procedure.**
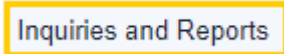
Inquire on a ePro Purchase Order

Procedure

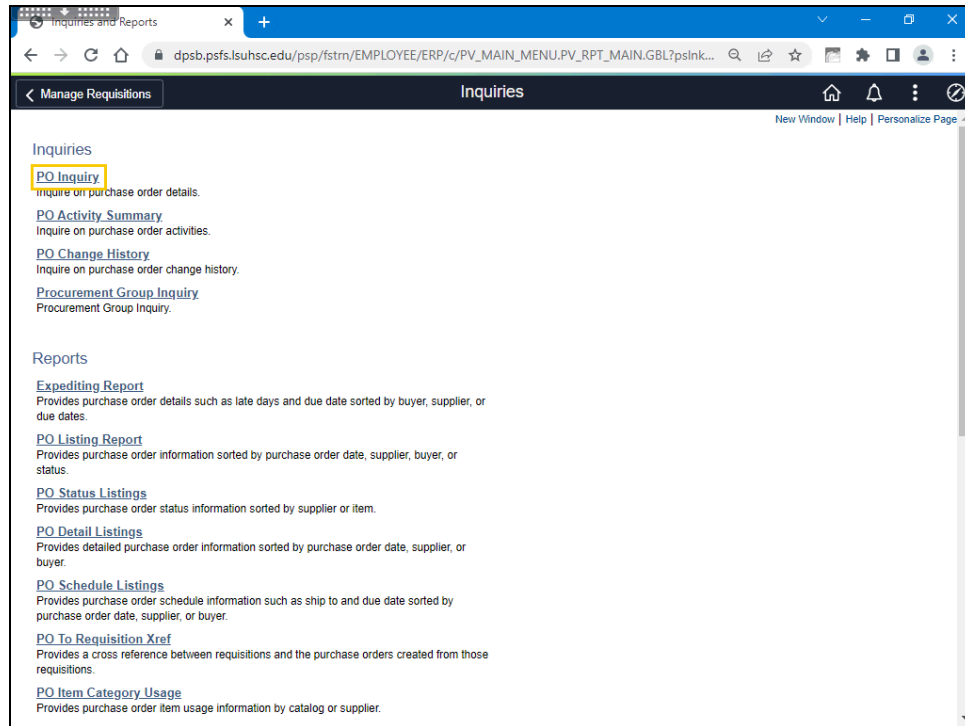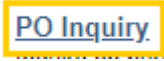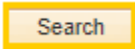In this topic you will learn how to **Inquire on an ePro Purchase Order**.

Step	Action
1.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.
4.	Click the **Buyer Center** menu.
5.	Click the **Inquiries and Reports** menu.

Step	Action
6.	Click the **PO Inquiry** link. **PO Inquiry**
7.	Enter the desired information into the **PO ID:** field. Enter "**6690383**".
8.	Click the **Search** button. **Search**
9.	The *Purchase Order Inquiry* page displays. Users can view relevant PO information such as Status, Budget Check, Supplier Line Details, etc. Click the **Line Details** button.
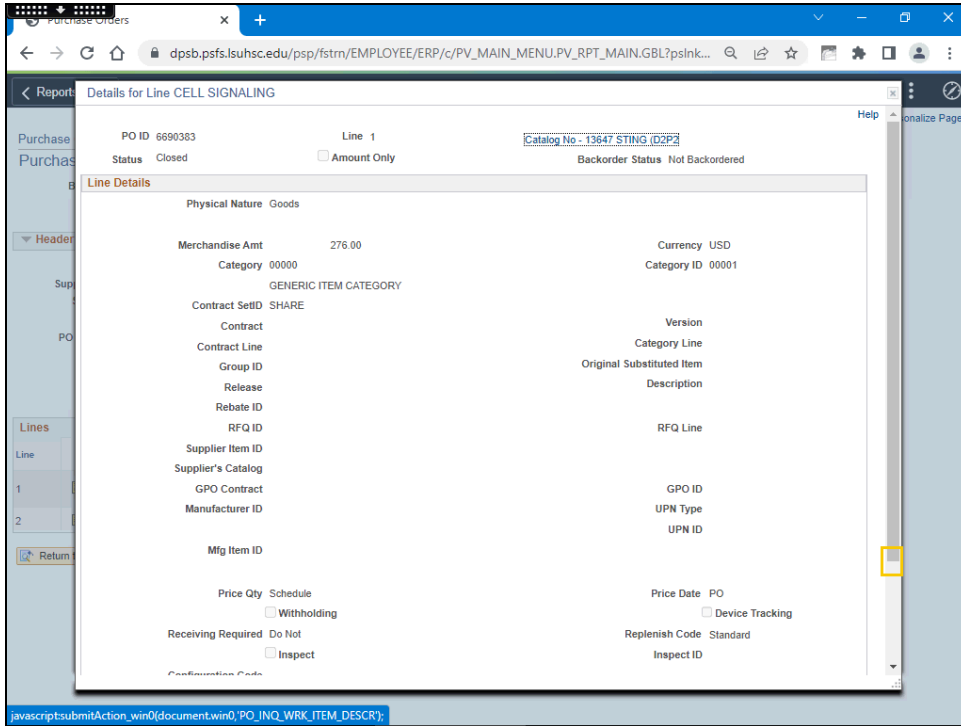
Step	Action
10.	The *Line Details* page displays information about each line item within the requisition, such as Status, Backorder Status, Merchandise Amt., Category, etc. Click the **Down** scrollbar.
11.	Click the **Return** button. Return
12.	Click the **Line 1 - Schedule** button.

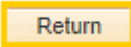| Step	Action
13.	The **Schedule** page contains the *Distribution* button. It also provides users with shipping information for the item, such as where the item is being shipped to, when it's due, the merchandise amount, and cost of the item. Click the **Right** scrollbar.
14.	Click the **Distributions/ChartFields** button.
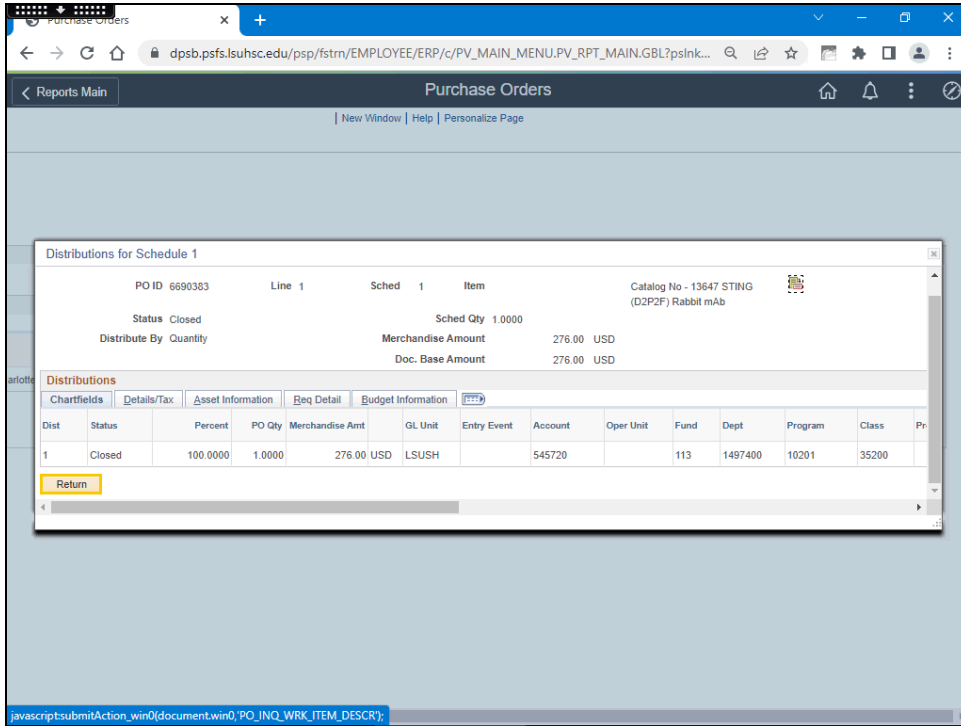
Step	Action
15.	The *Distribution* page displays distribution statuses, as well as the chartstring information by which the system allocates or charges an expense account. Click the **Return** button. Return
16.	Click the **Return to Main Page** link. Return to Main Page
17.	Click the **Header Details** link. Header Details
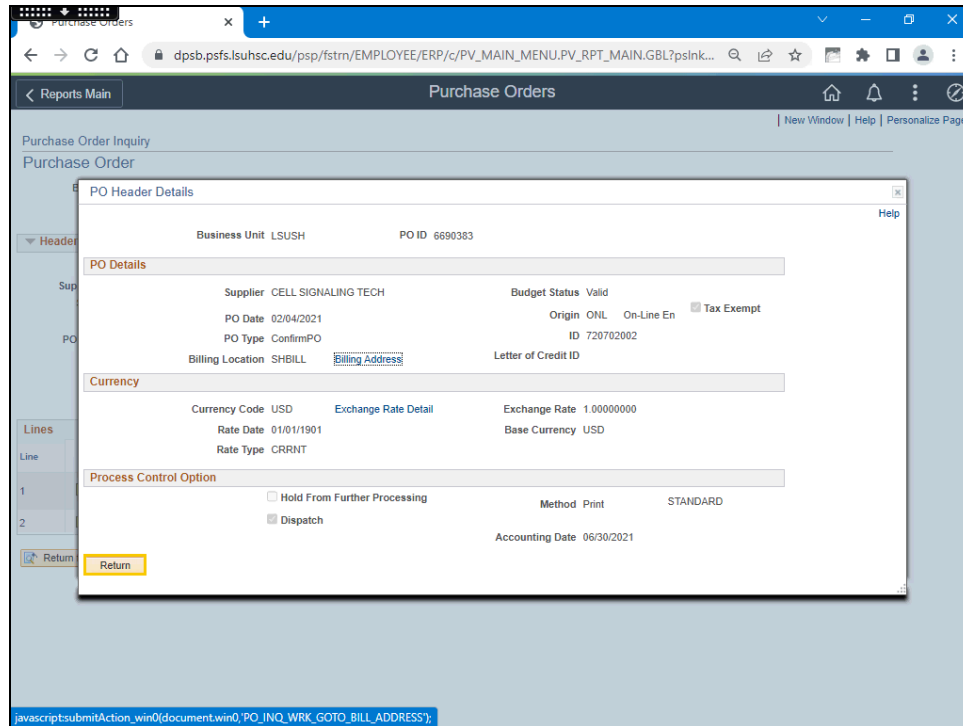
Step	Action
18.	The *Header Details* page contains information relevant to the entire requisition such as Supplier, Billing Address, Budget Check, etc. Click the **Return** button. **Return**
19.	Click the **Supplier Details** link. **Supplier Details**
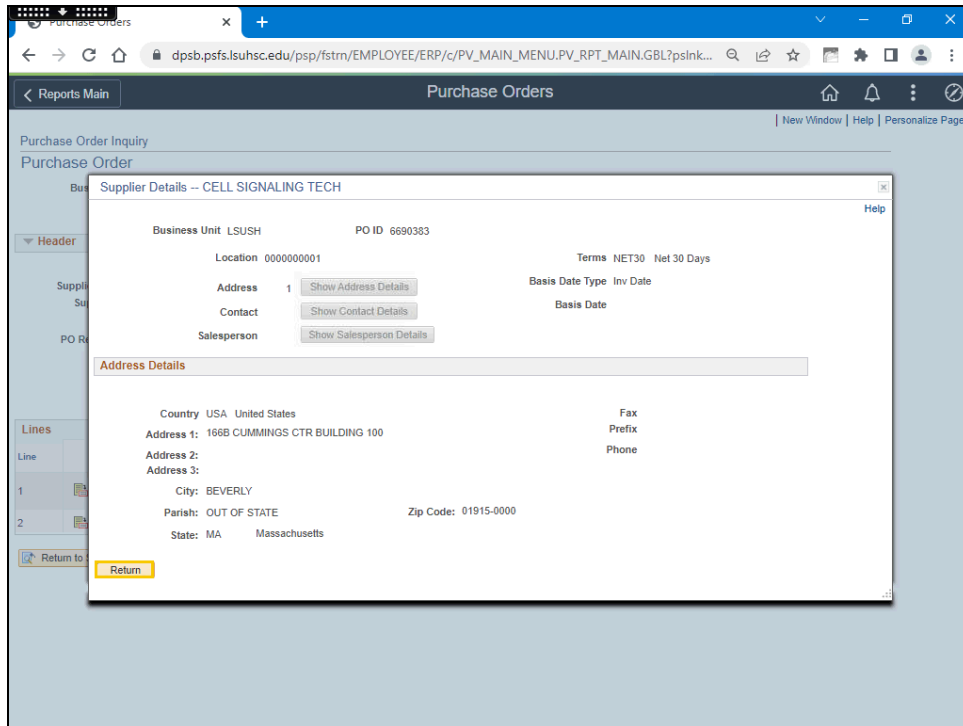
Step	Action
20.	Users are able to view all the supplier detail information on the *Supplier Details* page, such as Terms, Address, Basis Date Type, etc. Click the **Return** button. Return
21.	Click the **Document Status** link. *NOTE: This will open a new window.* Document Status

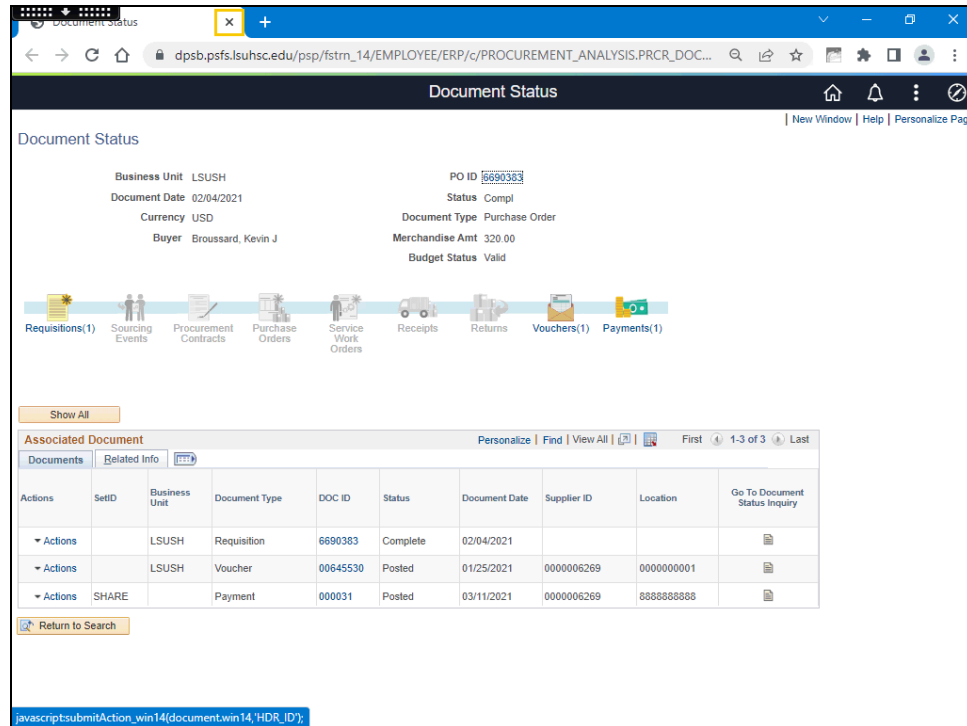| Step	Action
22.	Users are able to view additional documents associated with the PO on the *Document Status* page. Links associated with each document can be selected to view the various document inquiry pages. Click the **Close** tab. ![Close tab]
23.	Click the **Activity Summary** link. ![Activity Summary]
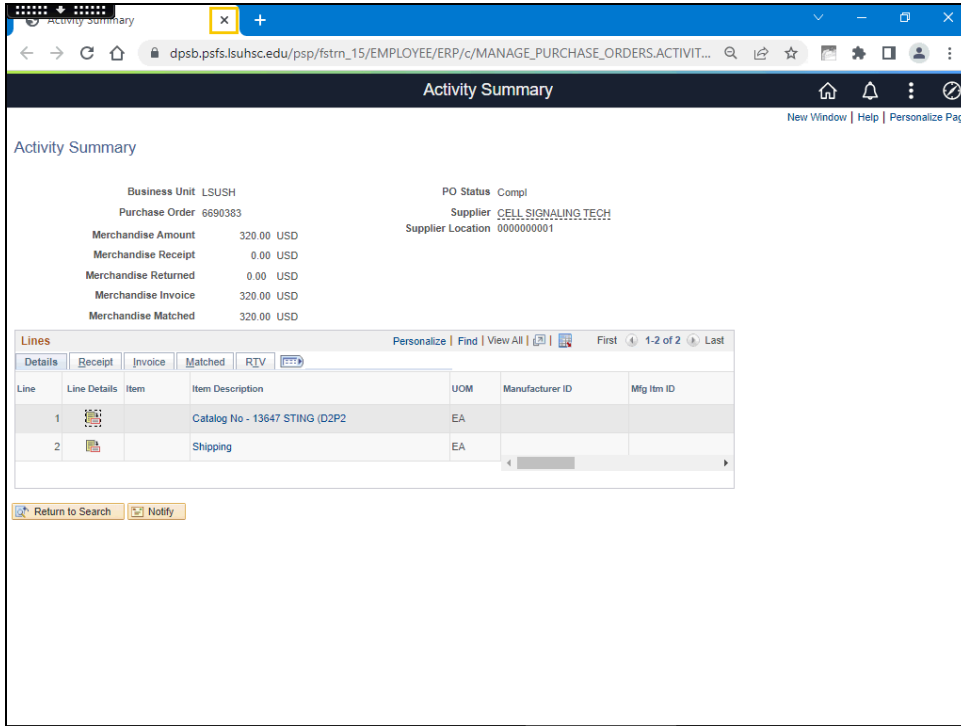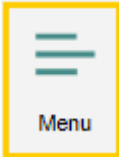
Step	Action
24.	On the *Activity Summary* page, users can view information for receiving, invoicing, matching and returning activities that have been performed on the selected PO to date. Click the **Close** tab.
25.	This completes *Inquire on an ePro Purchase Order*. **End of Procedure.**

Inquire on Document Status

Procedure

In this topic you will learn **Inquire on Document Status**.

NOTE: While this method does not provide the level of detail that the Document Status page does, this is a useful and convenient way to view documents/changes associated with the requisition.

Step	Action
1.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.
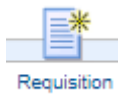
Step	Action
4.	Click the **Manage Requisitions** link.

Step	Action
5.	Enter the search parameters to find the requisition. Be sure to note the dates used for the search. The **Expand the Requisition** arrow allows users to view additional details on the requisition. Click the **Expand the Requisition** button.
6.	Click the **Requisition** link.
7.	Click the **Return to Manage Requisitions** link.
8.	**Invoice** icon allows the user to view receipt details. Click the **Approvals** link.
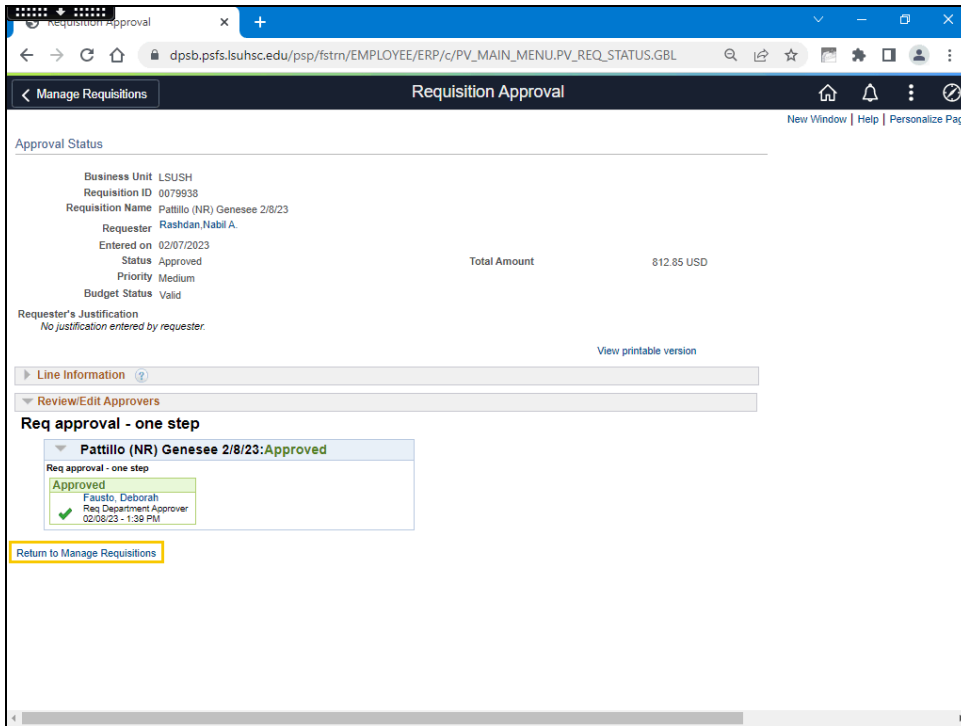
Step	Action
9.	Click the **Return to Manage Requisitions** link.

Step	Action
10.	The **Lifespan** of the requisition will display and any related documents to the requisition can be accessed. Colored icons indicate documents associated with the requisition. In this example, there are Purchase Orders, Invoice, and Payment icons available. Icons in gray indicate that no documents of this type exist. Click the **Purchase Order** link.
11.	Details of the related PO can be viewed here. However, distribution chartfields cannot be accessed. You can return to the Manage Requisitions page by clicking on the **Return to Mange Requisitions** link in the bottom left of the screen.
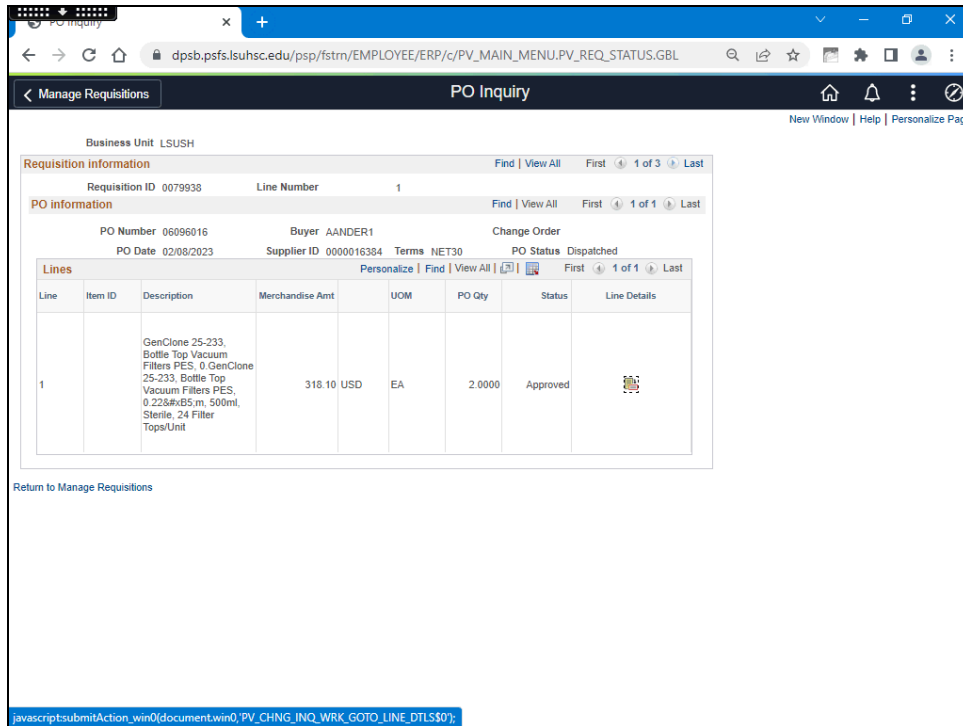
Step	Action
12.	This completes *Inquire on Document Status*. **End of Procedure.**
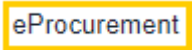
View Print Requisitions

View Print Form for a Saved Requisition

Procedure

In this topic you will learn how to **View Print Form for a Saved Requisition.**

NOTE: eProcurement allows the user to view the requisition in several ways. Users can view print while they are in the requisition, have saved it for later, from the Manage Requisition menu, and/or from the Purchasing menu.

Step	Action
1.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.

Step	Action
4.	Click the **Manage Requisitions** link. Manage Requisitions

Step	Action
5.	Click the button to the right of the **Line 1 Select Action** field.
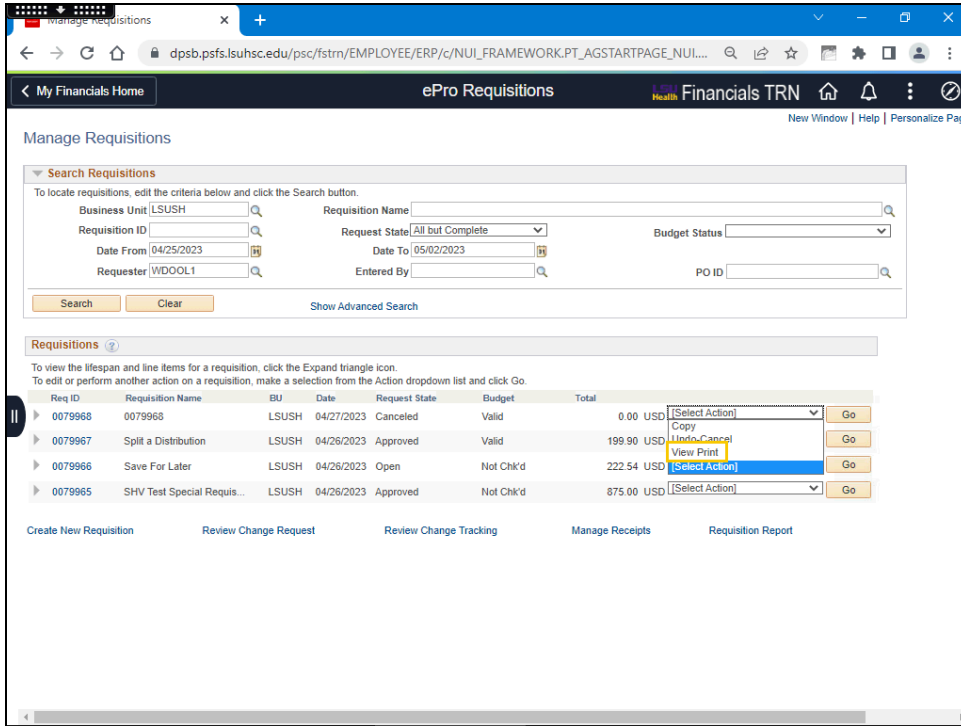
Step	Action
6.	Click the **View Print** list item. ![View Print]
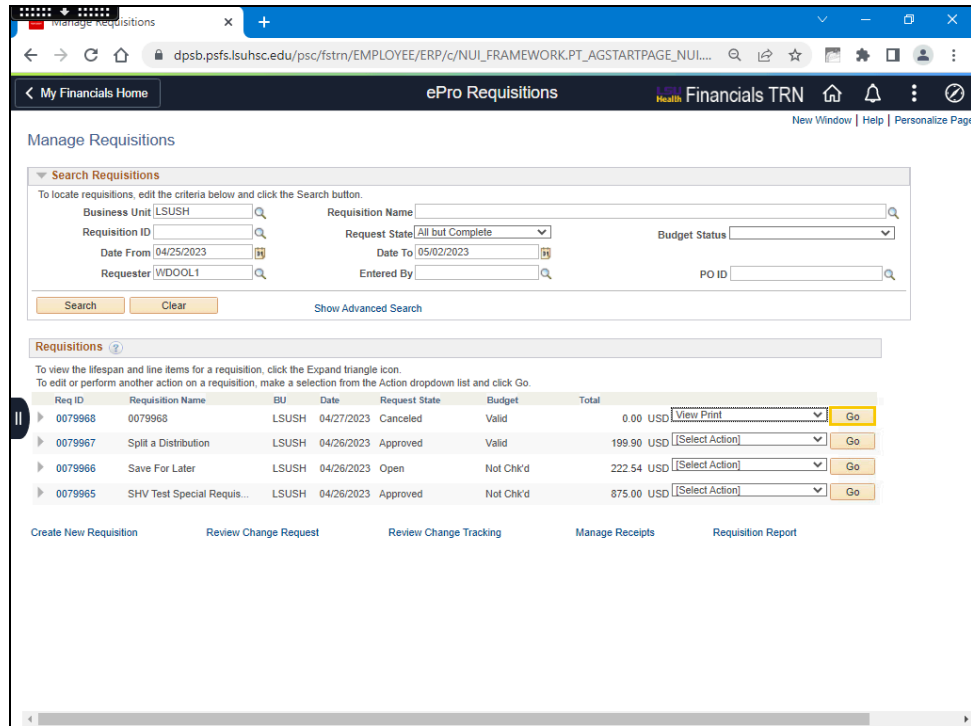
Step	Action
7.	Click the **Line 1 Go** button.
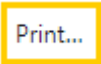
Step	Action
8.	A message will display asking if you want to print the distribution details. Select **Yes** to include the chartstring information on the printout, or **No** to exclude the chartstring information on the printout. Click the **Yes** button. Yes

Step	Action
9.	The requisition will process and display for printing. A new tab opens that displays the printable version of the requisition. To print, right click anywhere in the requisition and select **Print...**. Click the **Print...** link. Print...

Step	Action
10.	The requisition opens the print pdf window for printing. If you are not connected to a printer, it will default the destination to Save as PDF. If you are connected to a printer, you can choose the destination and then print.

For **training purposes only**, click the **Cancel** button.

 |
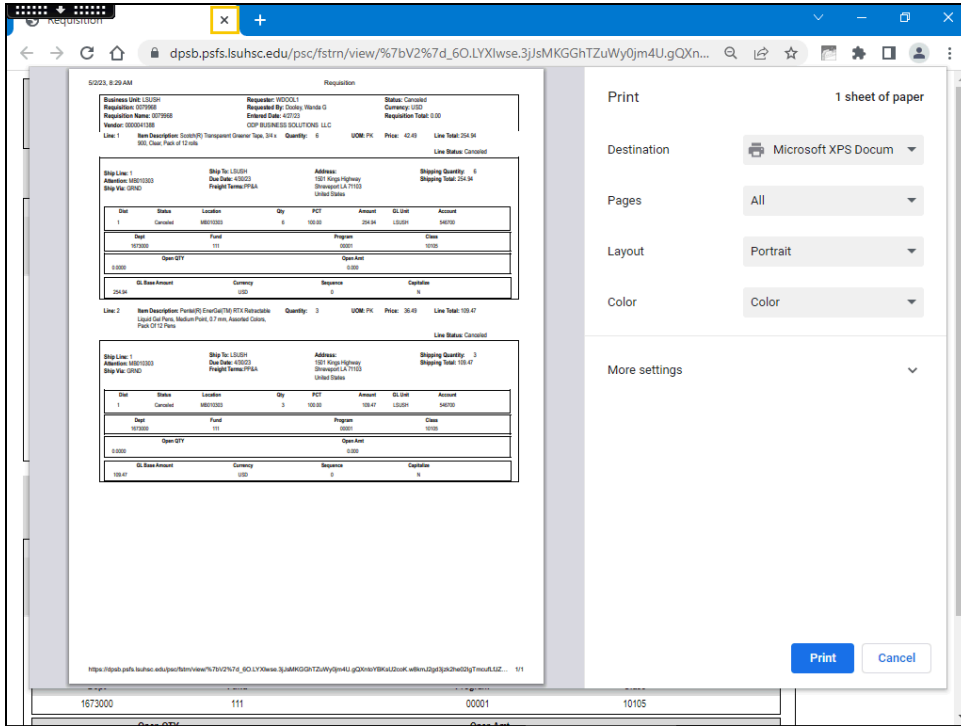
Step	Action
11.	Once the requisition has printed, the two-toned requisition remains displayed on the screen. Click the **X** on the tab in the upper left corner to close the screen.
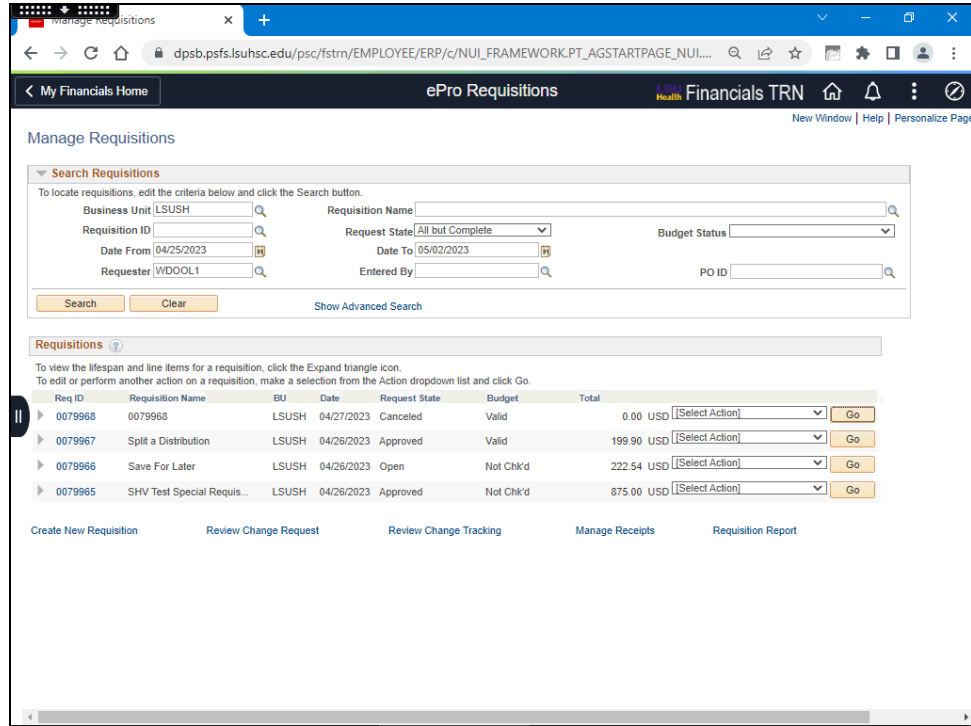
Step	Action
12.	This completes the *View Print Form for a Saved Requisition*. **End of Procedure.**
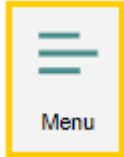
Print via the Requisition Report Process

Procedure

In this topic you will learn to **Print via the Requisition Report Process**.

Step	Action
1.	*NOTE: eProcurement allows the user to view the requisition in several ways. Users can view print while they are in the requisition, have saved it for later, from the Manage Requisition menu, and/or from the Purchasing menu.*
2.	Click the **NavBar** link.
3.	Click the **Menu** link.
4.	Click the **eProcurement** link.

Step	Action
5.	Click the **Manage Requisitions** link. Manage Requisitions

Step	Action
6.	The **Manage Requisition** page displays.
7.	In this example, the Requisition date of **04/27/2023** is used. There is one (1) requisition available for review. Click the **Search** button. [Search]

Step	Action
8.	Below the list, there are links to *Create New Requisition*, *Review Change Request*, *Review Change Tracking*, *Manage Receipts*, and *Requisition Report*. To run the process to print one or more requisitions, click the **Requisition Report** link at the bottom right of the page. ![Requisition Report]
9.	*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.* Click the **Add a New Value** tab. ![Add a New Value]
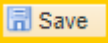
Step	Action
10.	**Run Control ID** A **Run Control ID** is used to access the Process Scheduler. You may save parameters to a particular process or report to a **Run Control ID** to minimize data entry when running recurring processes and/or reports. A **Run Control ID** is: • Specific to an end-user's Operator (User) ID; • Can be entered in upper case, lower case, or mixed case; • Can be up to 30 characters long; • Characters can be either numbers or letters, but <u>cannot</u> include any **special characters** (e.g., $, #, &); • <u>Cannot</u> contain **blank** spaces; and • <u>Must</u> be one continuous string of characters **or** words <u>must</u> be linked by an underscore.
11.	Enter the desired information into the **Run Control ID** field. Enter "**VIEW_PRINT_REQ**".

Step	Action
12.	Click the **Add** button.

Step	Action
13.	Users will enter or select the following report parameters: • **Business Unit** • **Requisition ID** • **Statuses to Include:** o **Select All** o **NOT On Hold** *NOTE: The From Date, Through Date and Requester fields will be left blank.*
14.	After entering the desired Report Request Parameters, click the **Save** button. ![Save button]
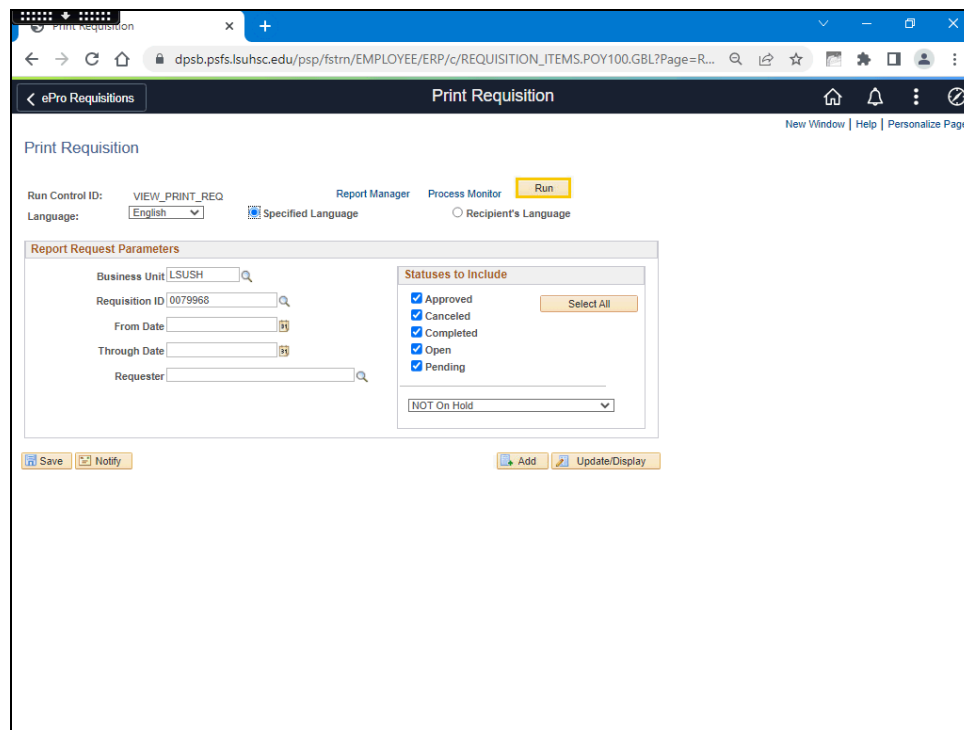
Step	Action
15.	Click the **Run** button. ![Run button]
16.	Select the appropriate **Server Name**. Click the **PSNT** list item. ![PSNT]
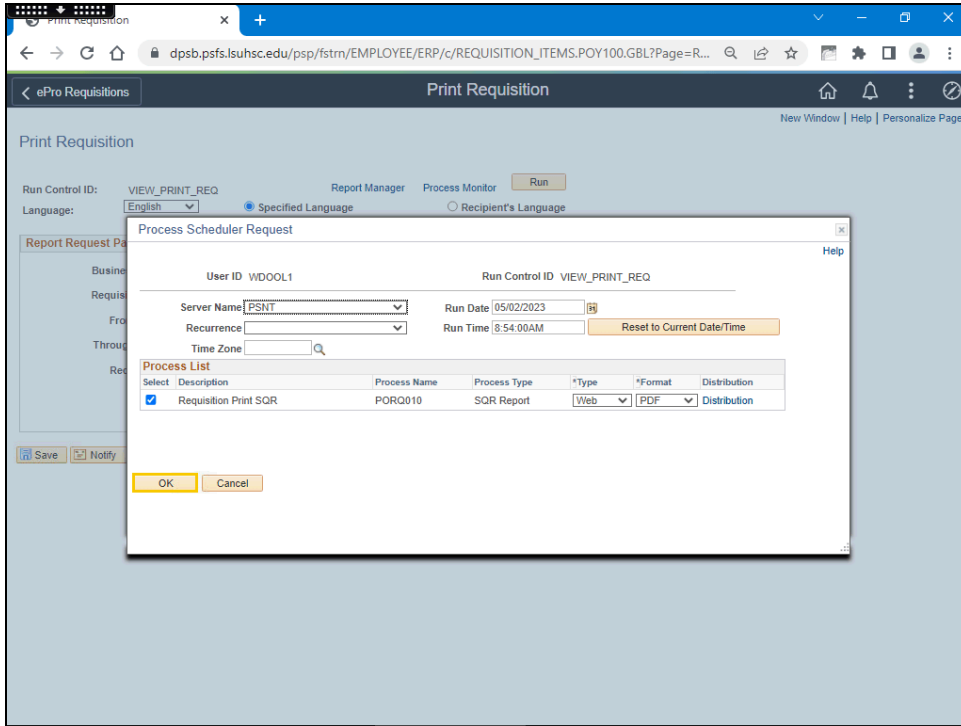
Step	Action
17.	All other parameters will remain as defaulted. Click the **OK** button. OK
18.	You are returned to the **Print Requisition** page and the *Process Instance* is displayed. You may navigate to the Process Monitor page or the Report Manager page to check the status of the process and then view the requisition. Click the **Process Monitor** link. Process Monitor

Step	Action
19.	The process must have a **Run Status = Success** and **Distribution Status = Posted**. If either status is other than Success or Posted respectively, click the **Refresh** button every 10-15 seconds until the correct statuses are achieved. Click the **Report Manager** link. Report Manager
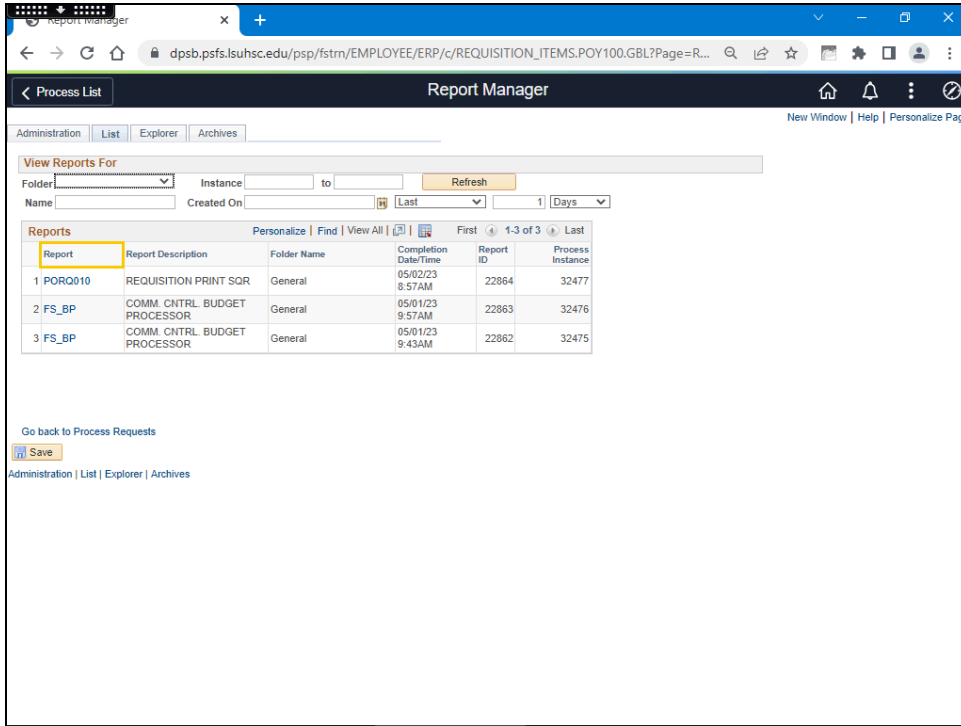
Step	Action
20.	The blue link un the Report column is the completed report. Click the **PORQ010** link.
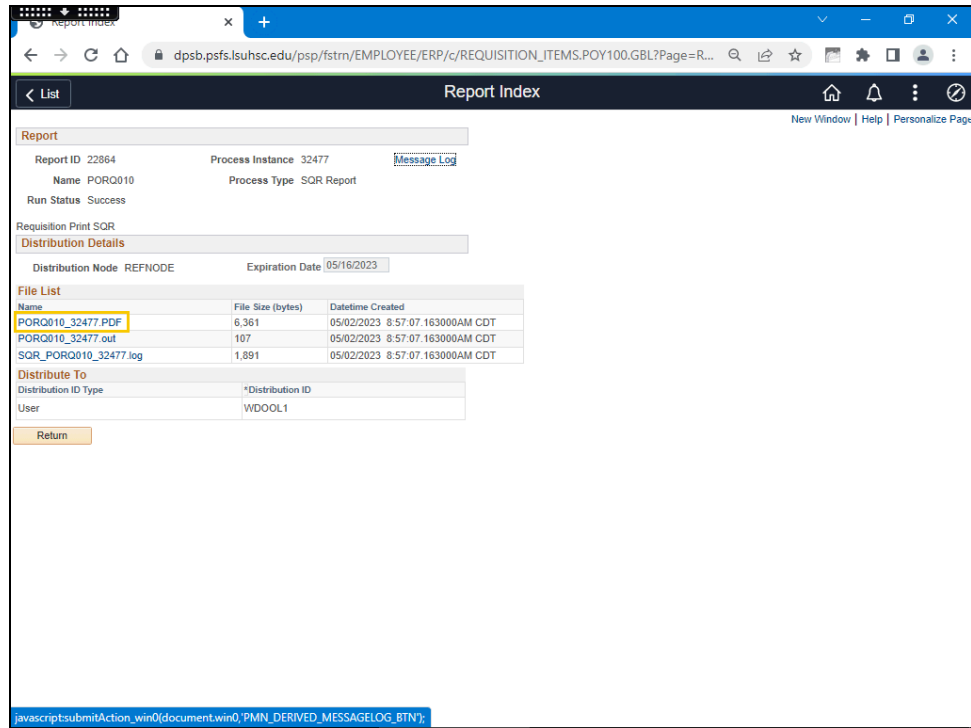
Step	Action
21.	Click the **PORQ010_32477.PDF** link. PORQ010_32477.PDF
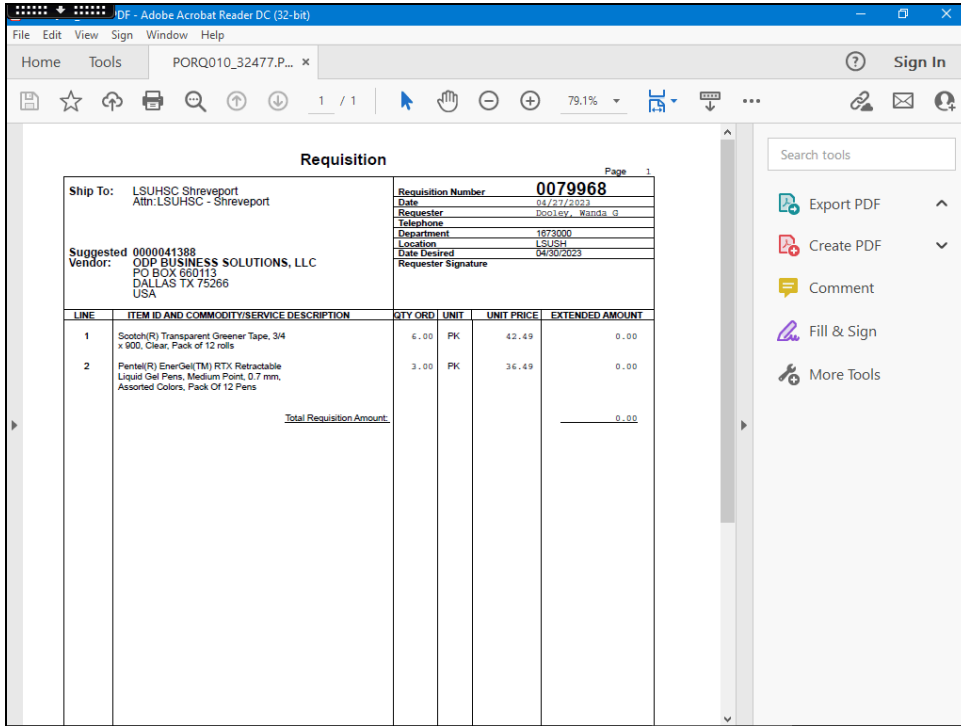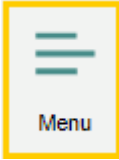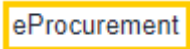
Step	Action
22.	The PDF file displays. You may select the printer icon to print the requisition.
23.	This completes *Print via the Requisition Report Process*. **End of Procedure.**

Requisition Basics

Use the Lookup Feature

Procedure
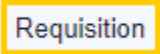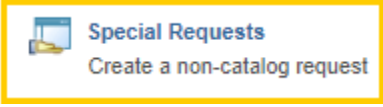
In this topic you will learn how to **Use the Lookup Feature**.

Step	Action
1.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.

Step	Action
4.	Click the **Requisitions** link. Requisition
5.	Click the **Special Requests** link. Special Requests Create a non-catalog request
6.	Click the **Requisition Settings** menu. Requisition Settings
7.	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. 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.
8.	In this example you will search for an appropriate value for the Supplier field. The 10-digit Supplier ID number is the value needed for the Supplier field rather than the supplier name. You will locate and select *ACCUTEMP* utilizing the **Lookup** feature. Once selected, the system will default the Supplier ID number into the Supplier field, thus completing the Lookup process.
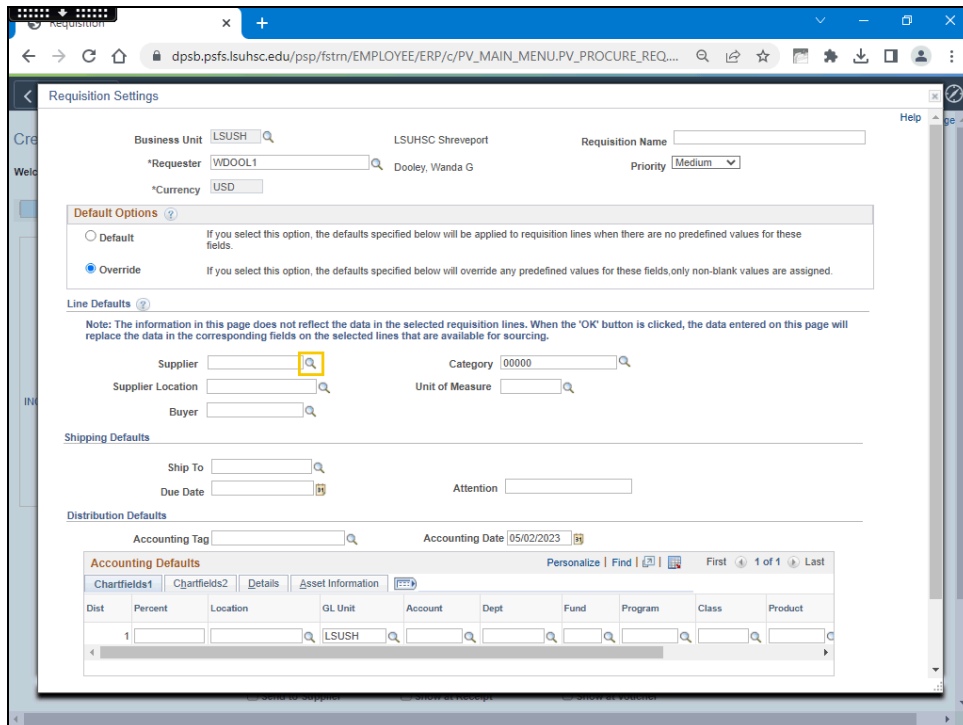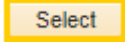
Step	Action
9.	Click the **Supplier Lookup** button.
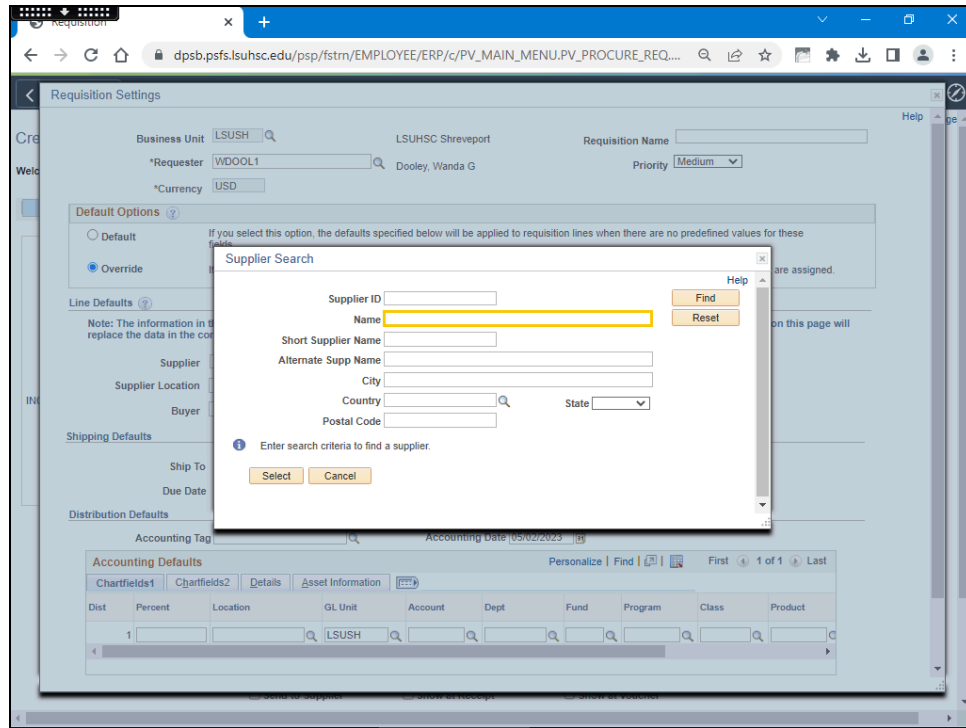
Step	Action
10.	A pop-up **Supplier Search** panel displays. Users will enter part or all of the supplier name in the Name field. Enter the desired information into the **Name** field. Enter "**ACCU**".
11.	Click the **Find** button.
12.	The system has only returned supplier names that begin with the "**ACCU**." A total of 14 options have been retrieved with the first 10 displaying in the Search Results area.
13.	Click the **Line 5 ACCUTEMP PRODUCTS, INC** option.

Step	Action
14.	Click the **Down** button of the scrollbar.
15.	Click the **Select** button.
16.	The system defaults the desired *Supplier ID* and *Supplier Location code* into the **Supplier** and **Supplier Location** fields respectively.
17.	This completes *Using the Lookup Feature*. **End of Procedure.**
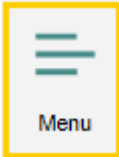
Create/Find a Run Control ID

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 <u>FIRST</u> 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.	Click the **NavBar** link.
2.	Click the **Menu** link.
3.	Click the **eProcurement** link.
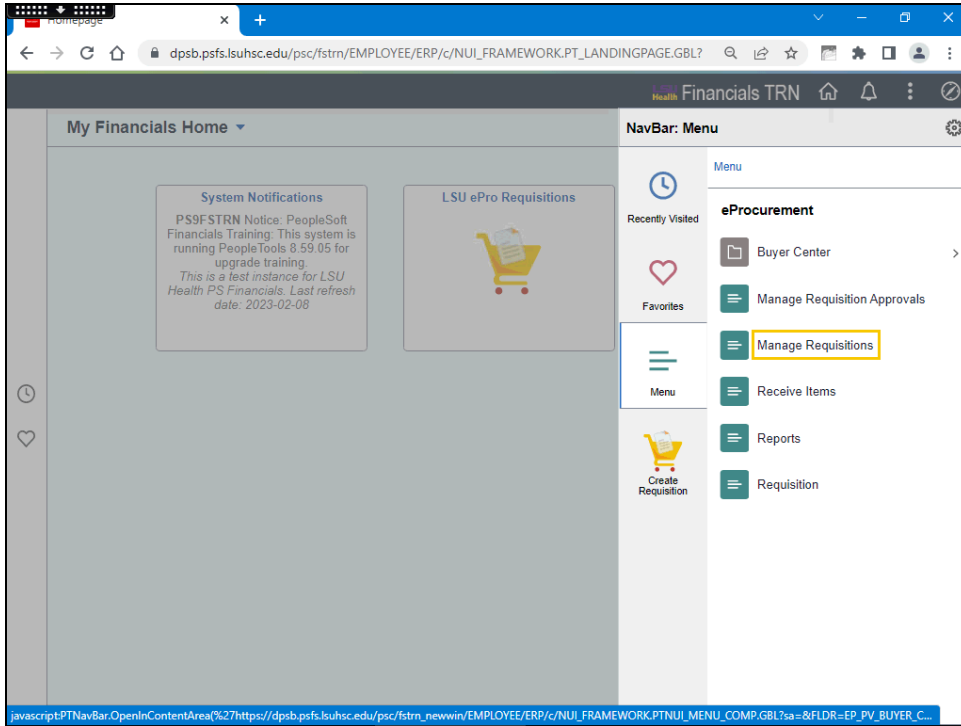
Step	Action
4.	Click the **Manage Requisitions** link. ![Manage Requisitions]
5.	In this example, the **Requisition ID** is *0079965* and the **Date From** is *04/26/2023*. The **Date To** will remain as defaulted.
6.	Enter the desired information into the **Requisition ID** field. Enter "**0079965**".
7.	Enter the desired information into the **Date From** field. Enter "**04/26/2023**".
8.	Click the **Search** button. ![Search]
9.	Click in the **Requisition Report** field. ![Requisition Report]

Step	Action
10.	The first time you use *Requisition Report*, you will need to create a Run Control ID in order to access the *Process Scheduler*. The system defaults you into the *Find an Existing Value* tab; clicking the *Search* button will display any existing run control ids. Create a new Run Control ID by clicking the *Add a New Value* tab or hyperlink. *NOTE: On all subsequent prints, you will use the Find an Existing Value tab to search for existing Run Control IDs.*
11.	Click in the **Add a New Value** field. Add a New Value
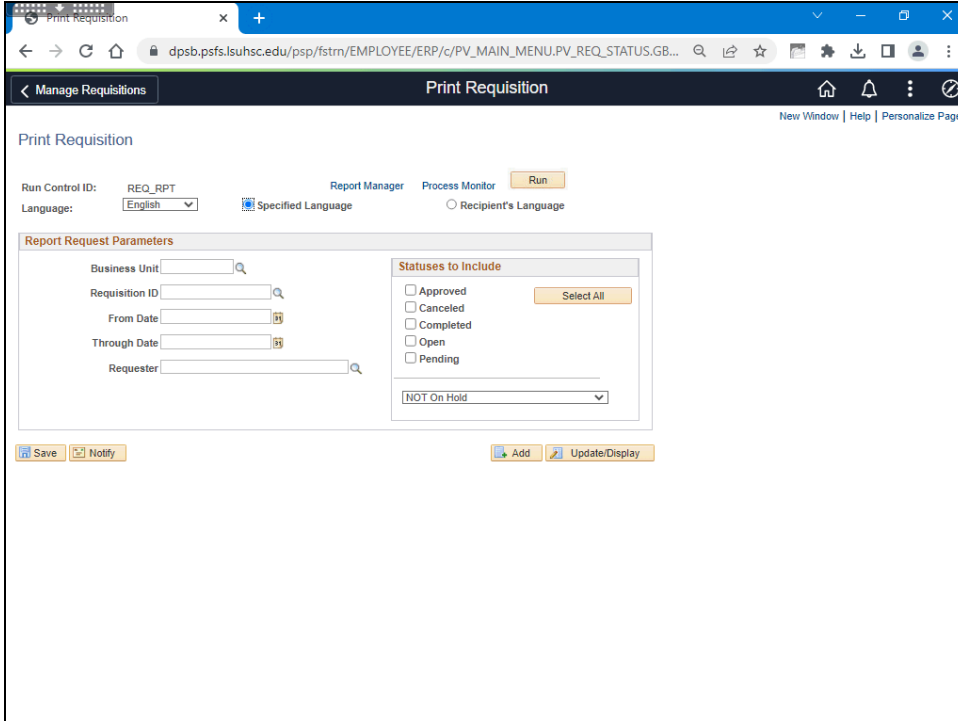
Step	Action
12.	**Run Control ID** A **Run Control ID** is used to access the *Process Scheduler*. You may save parameters to a particular process or report to a **Run Control ID** to minimize data entry when running recurring processes and/or reports. A **Run Control ID** is: • Specific to an end-user's Operator (User) ID; • Can be entered in upper case, lower case, or mixed case; • Can be up to 30 characters long; • Characters can be either numbers or letters, but **cannot** include any **special characters** (e.g., $, #, &); • **Cannot** contain **blank** spaces; and • **Must** be one continuous string of characters **or** words **must** be linked by an underscore.
13.	Examples of Run Control IDs that **meet** the requirement: 1. **REQ_RPT** can be used since an underscore links the two words together; or 2. **REQUISITIONREPORT** can be used because it is one string of characters.
14.	Examples of Run Control IDs that **do not meet** requirements: 1. **REQ RPT** because there is a blank space between the two words; or 2. **REQUISITION_REPORT'S** because a special character, an apostrophe, is used.

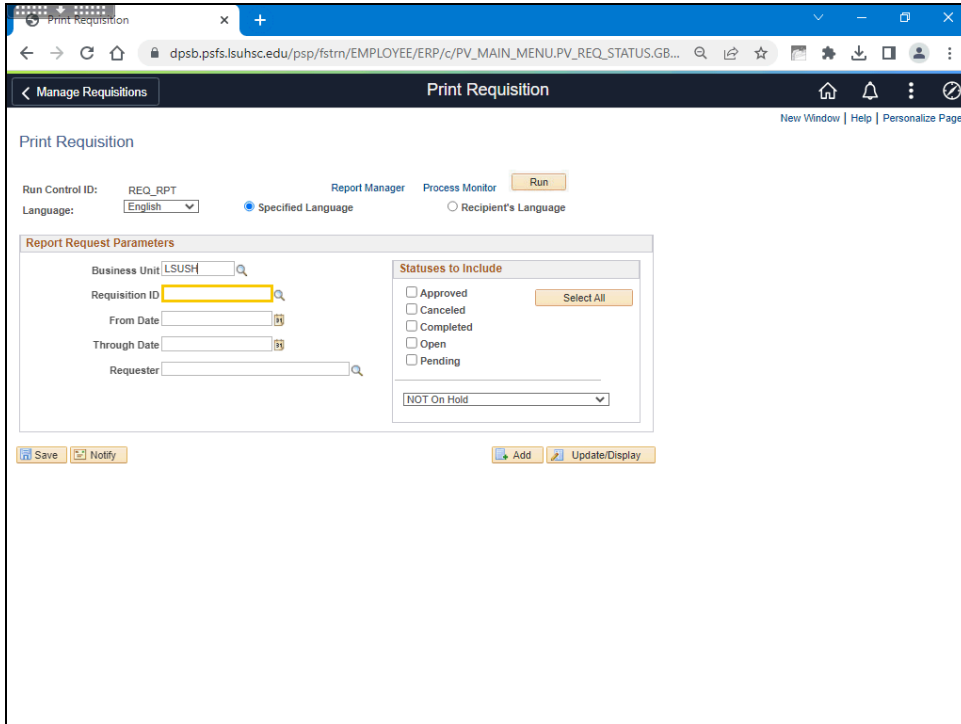| Step	Action
15.	A Run Control ID **must** be created to run many reports in PeopleSoft. *If a Run Control ID is created that is unique to a specific report, it can be used to run the specific report in the future. The advantage to this method is that all report parameters are saved with the run control.* 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 ID to use for all reports, then you will need to change all report parameters each time a report is run.
16.	Enter the desired information into the **Run Control ID:** field. Enter "**REQ_RPT**".
17.	Click the **Add** button. Add
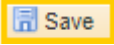
Step	Action
18.	The parameters you enter on the **Print Requisition** page will be saved to the specified **Run Control ID**. When running the report in the future, the user will only change the **Requisition ID**; all other fields will remain as defaulted. You **must** save your parameters in order for your parameters to default in the future.
19.	Enter the desired information into the **Business Unit** field. Enter "**LSUSH**".

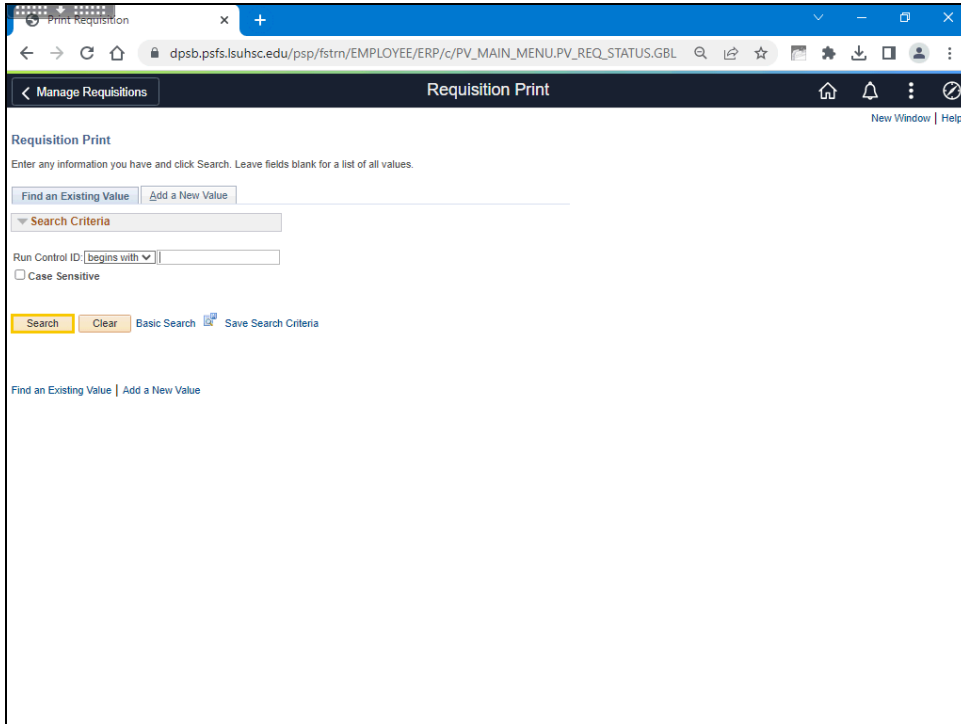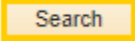| Step	Action
20.	Enter the desired information into the **Requisition ID** field. Enter "**0079965**".
21.	*NOTE: Do <u>not</u> enter From Date, Through Date, or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must</u> <u>be</u> <u>requested</u> <u>and</u> <u>printed</u> <u>ONE</u> <u>AT</u> <u>A</u> <u>TIME</u>, entering the Requisition ID will be sufficient to identify the requisition.*
22.	**Statuses to Include** If you select the wrong status, it will prevent the requisition from printing (i.e.g, the end-user checked Pending, but the requisition is already Approved). By clicking the **Select All** button, you will be able to print the requisition in any status. Click the **Select All** button.
23.	The bottom status will remain as defaulted as **NOT On Hold**.
24.	Click the **Save** button. *NOTE: The Run Control and associated parameters <u>must</u> be saved to be reused for future prints.*

Step	Action
25.	*NOTE: After savings 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.* For **training** **purposes** **only**, click the **Manage Requisitions** link, then click the **Requisition Report** link.

Step	Action
26.	Click the **Search** button.

Step	Action
27.	A list of available **Run Control IDs** will display. Once a **Run Control** is selected, the **Print Requisition** page displays the information from the most recent print request for that **Run Control ID**. *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. Also, if only one run control has been created, the system will default you to the Print Requisitions page.* Click the **REQ_RPT** link. REQ_RPT
28.	The **Print Requisition** page associated with the selected run control displays.
29.	This completes *Create/Find a Run Control ID*. **End of Procedure.**