



Managing Requisitions 9.2

HCS D

Version Date: November 5, 2020

Training Guide
Managing Requisitions 9.2 HCSD

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Managing Requisitions 9.2 - HCSD

Welcome to the **PeopleSoft 9.2 pt. 8.57 Managing Requisitions** module! This module contains the tools needed to learn many of the concepts and procedures involved in Requisitioning items.

Goal

To have the skills and knowledge necessary to create Non-Contract Requisitions and perform the objectives listed below.

Participant Objectives

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

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

NOTE: The functions in this manual must be performed in the PeopleSoft Production Database. Any data entered into a non-production database (i.e. Reports (PS9FSRPT) or Sandbox (PS9FSSND)) will be lost. For training purposes only, the exercises provided in this manual will be completed in the PeopleSoft Training (PS9FSTRN) database.

Enter a Non-Contract Requisition

Four (4) Steps to Entering a Requisition

Step 1: Add/Update Requisitions and Hold From Further Processing

Use Add a New Value to enter a new requisition and Find an Existing Value tab to search for an existing requisition. Check the Hold From Further Processing box to prevent the requisition from routing to the Approver's Worklist before completion.

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NOTE: Steps 2 - 5 must be completed in the order presented. Changing order of steps may cause save errors which can required the requisition to be re-entered.

Step 2: Enter Accounting Date and Defaults (Requisition Defaults page)

You **must** enter the Accounting Date prior to entering Defaults to ensure Budget Period defaults appropriately.

You **must** enter Defaults (i.e. the Chartstring(s) to which the item(s) is being charged) in the Requisition Defaults page first in order to properly save the requisition.

Step 3: Enter Item Information

Enter the Item to be ordered in the Requisition page;

Step 4: Uncheck Hold From Further Processing and Save the Requisition

You **must** Uncheck Hold From Further Processing and Save your requisition in order to advance the requisition in the Purchasing process.

3 Optional Steps

Although optional, these steps are **routinely** used to provide additional, relevant information to the requisition.

Step 5: Enter Header and/or Line Comments

Comments can be added at the Header and Line level using the same method.

Step 6: Attach Documents

Attaching documents is an alternative to using Comment boxes.

Step 7: Print a Requisition

You can print a hard copy of the requisition using the View Printable Version or Print a Requisition option.

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

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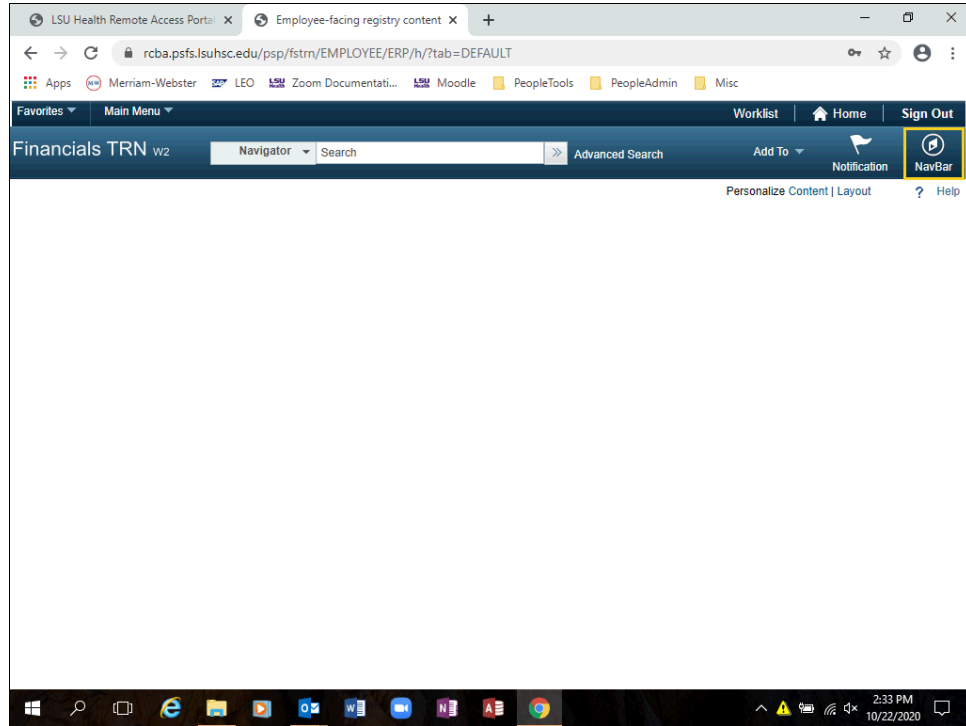
Step 1: Add/Update Requisitions and Hold From Further Processing Procedure

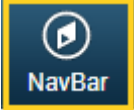
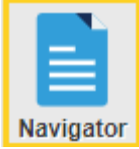


In this topic you will learn **Step 1: Add/Update Requisitions and Hold From Further Processing**.

Step	Action
1.	<p>What is a Requisition?</p> <p>A requisition is a request for items to be ordered from a vendor. Once the requisition is entered into the PeopleSoft system, the following two things must occur in order for Purchasing to be able to generate a Purchase Order to the vendor in the PeopleSoft system:</p> <ul style="list-style-type: none"> • The requisition must be approved; • The requisition must pass the Budget Check process. <p>Throughout the procurement process, Budget Checking ensures that financial obligations and expenditures do not exceed budget limitations. Controls are created to permit only those transactions that are applied to correct calendar periods, as well as to the correct account types and ChartString combinations. Budget Checking a requisition also verifies that the allocated funds are still available before a liability is created. In short, the Budget Check process verifies that the ChartString entered into the requisition is valid and that the funds are available for the ChartString.</p>
2.	<p>Contacts for Assistance</p> <p>The following will be your contacts for entering and managing requisitions:</p> <ul style="list-style-type: none"> • For technical assistance with PeopleSoft (e.g. problems accessing PeopleSoft, assistance with changing password, etc.), contact the Help Desk as follows: <p>Long Distance: 1-800-303-3290</p> <p>Local Calls: 1-504-568-HELP (4357); or</p> <p>Email: helpdesk@lsuhsc.edu</p> <ul style="list-style-type: none"> • For functional assistance with PeopleSoft (e.g. questions about entering requisitions, items being ordered, the bid process or other purchasing procedures), contact your Buyer or Purchasing Superuser if your Buyer is not available.
3.	<p><i>NOTE: The information entered in this exercise is for training purposes only. When working in Production, you must enter the appropriate department, chartstring, buyer, etc.</i></p>

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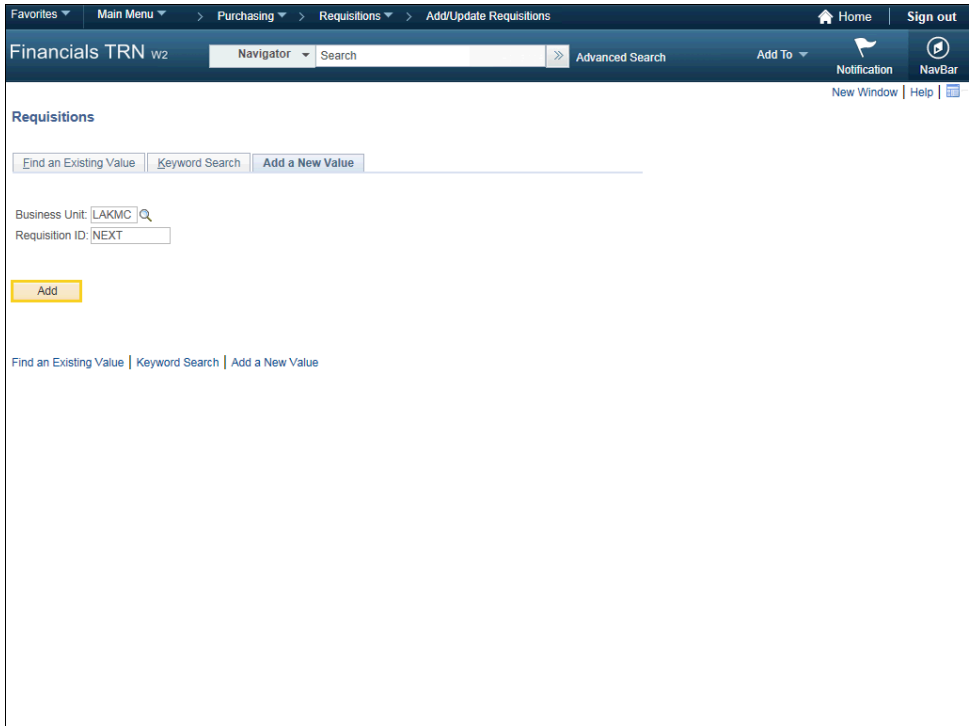



Step	Action
4.	Click the NavBar button. 
5.	Click the Navigator button. 
6.	Click the Purchasing menu. 
7.	Click the Requisitions menu. 

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Step	Action
8.	<p>Click the Add/Update Requisitions menu.</p> 
9.	<p><u>SCENARIO</u></p> <p>You have been asked to purchase 4 cases of nitrile chemo blue gloves 8ML, size Medium, for your department. The supplier is Cardinal Health-Medical Prod & Svcs, but the supplier number has not been provided. Each case costs \$162.48 and contains 4 boxes/100 each or 400 each.</p>



Step	Action
10.	<p>The Business Unit and Requisition ID (NEXT) will default and will remain as defaulted.</p> <p>NOTE: <u>DO NOT</u> enter a requisition number into the Requisition ID field to access an existing requisition. See the View an Existing Requisition and the Activity Log for additional information on finding an existing requisition.</p> <p>Click the Add button.</p> 

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Step	Action
11.	The Requisition Name field can be used to enter a description of the item(s) being purchased or free text. If the field is not populated, upon saving the system will automatically default the requisition id into the field.
12.	The Status will default as <i>Pending</i> and the Budget Status will be <i>Not Chk'd</i> . The requisition must have a Status of <i>Pending</i> when it is saved for the first time.

Step	Action
13.	Users will always check the Hold From Further Processing box, which allows the user to control when the requisition moves further through the process. Click the Hold From Further Processing option. <div style="border: 2px solid red; padding: 2px; display: inline-block;"><input type="checkbox"/> Hold From Further Processing</div>
14.	If the Hold From Further Processing is not checked, the first time the requisition is saved , it is routed for approval or to Purchasing.
15.	This completes Step 1: Add/Update requisitions and Hold From Further Processing . End of Procedure.

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Step 2: Enter Accounting Date and Defaults

Procedure

In this topic you will learn **Step 2: Enter Accounting Date and Defaults**.

Step	Action
1.	<p>Header</p> <p>Your <i>User ID</i> and name will default as Requester. If this information does not default, please contact your Purchasing department so that default information can be set up. The system will not let you save requisition information without requester information defaulting.</p> <p><i>NOTE: Fields marked with an asterisk are required fields.</i></p>
2.	<p>Header (continued)</p> <p>The Requisition Date will default as the current date and may remain as defaulted.</p> <p>The Accounting Date also defaults as the current date, but may be adjusted as needed (e.g., when entering a requisition for the next fiscal year). The Accounting Date must be changed when entering a requisition for the next fiscal year so budget period information will match. The Accounting Date must be changed prior to entering information on the requisition on the Requisition Defaults page or save errors may occur. If the Accounting Date is changed, the Due Date on the Requisitions Defaults page must match the Accounting Date.</p>
3.	<p>The dates must be entered as follows when creating a requisition for the next fiscal year:</p> <p>Accounting Date - 07/01/XX for the next fiscal year Due Date - 07/01/XX or later for the next fiscal year</p> <p><i>NOTE: It's advisable to change the accounting date <u>prior to entering any data on the requisition or copying a previous FY requisition</u> to ensure the budget period defaults to the distribution line.</i></p>
4.	<p>Add Comments at the Header level is used for additional shipping and receiving instructions, requests for quotes, supplier information, and all other information applicable to the entire requisition.</p>

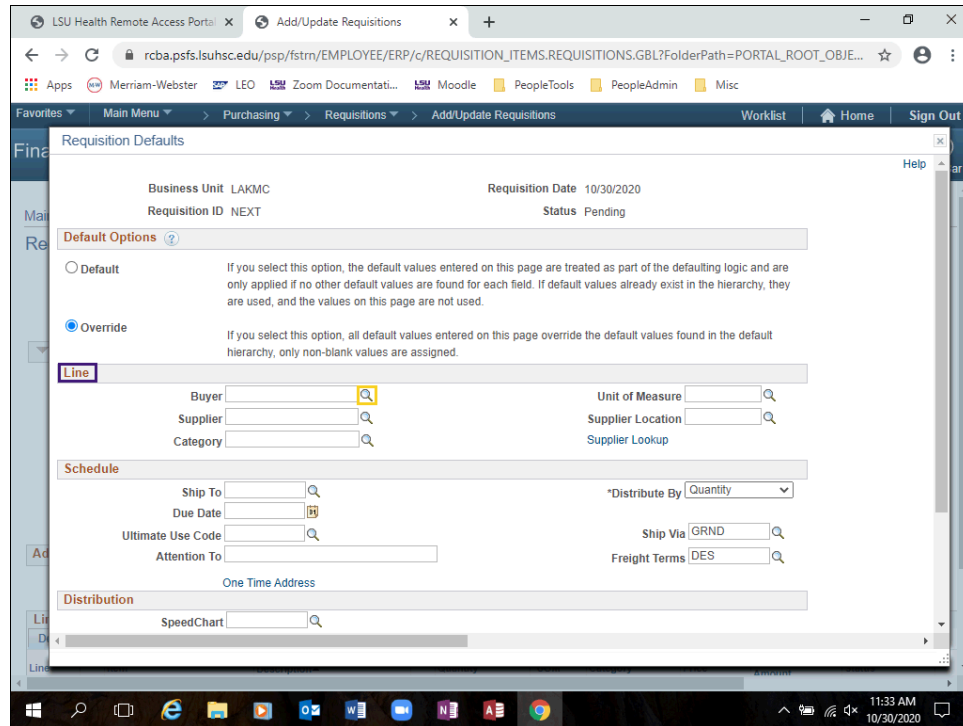
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Step	Action
5.	<p>The Requisition Defaults page is used to enter supplier, shipping and receiving, and accounting information. Information entered on the Requisition Defaults page will default to all lines items on the requisition.</p> <p>Click the Requisition Defaults link.</p> <p>Requisition Defaults</p>
6.	<p>Default information must be entered on the Requisition Defaults page for two reasons:</p> <ol style="list-style-type: none"> 1. In order to save the requisition. If default information is not entered, save errors may occur requiring you to re-enter the requisition from scratch. 2. In order for chartstring (Accounting) information to default to each line item. Chartstring information can be changed on any line item on the Distribution page. Entering default information here prevents you from having to enter it on each line item.
7.	<p>Default Options</p> <p>The Override option in the Default Options section should remain as defaulted.</p>

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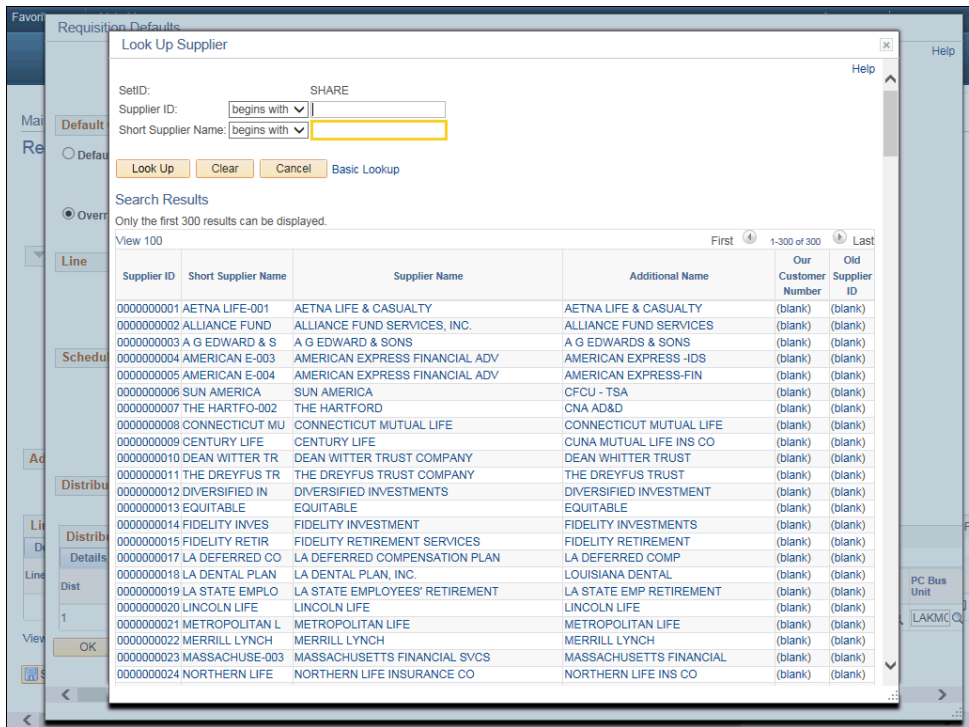


Step	Action
8.	<p>Line</p> <p>The <i>Buyer</i> field is not a PeopleSoft required field, but is a LAKMC required field.</p> <p>Click the Look up Buyer button.</p> 
9.	<p>Click the Alford, Annette Foster link.</p> 
10.	<p>Line (continued)</p> <p><i>Supplier</i> is a LAKMC required field. The <i>Supplier</i> field can only be left blank if the <i>Supplier</i> is not found in the PS database.</p> <p><i>NOTE: A requisition can have only one Supplier. Items not associated with the designated Supplier must be entered on another requisition.</i></p> <p>Click the Supplier button.</p> 
11.	<p>The first 300 results will display as a list. If the list contains more than 300 results, a message will display below Search Results stating only the first 300 can be displayed. The number of results can be reduced by entering all or part of the <i>Supplier ID</i> or <i>Supplier Short Name</i>.</p>

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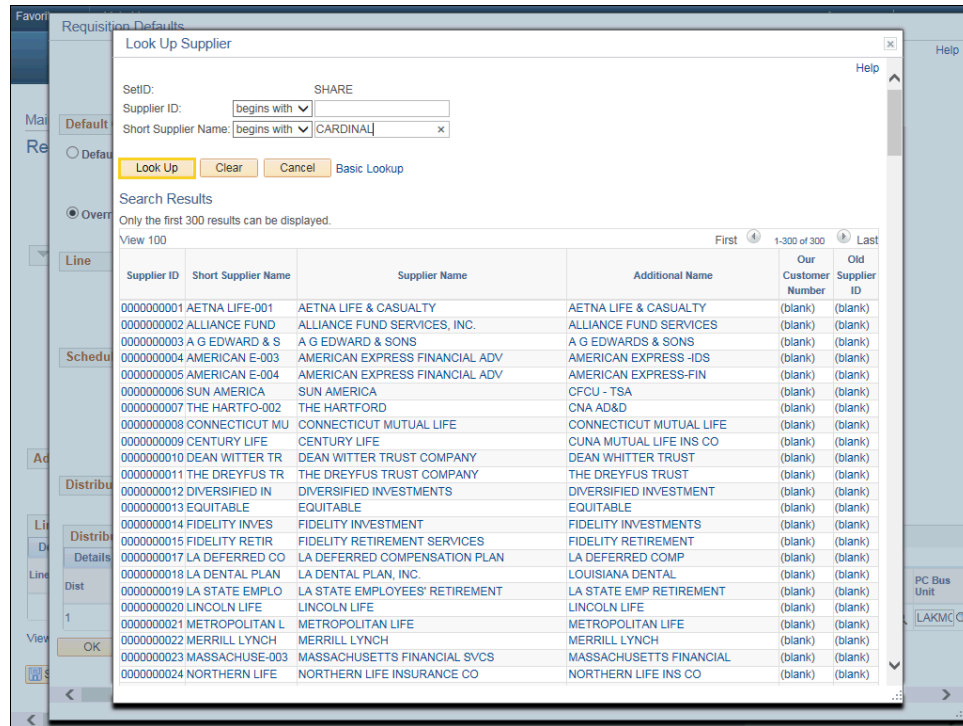
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Step	Action
12.	<p>There are three operands that can be used to help narrow your search results. They are:</p> <ul style="list-style-type: none"> • begins with, • contains, and • the wildcard (%). <p>NOTE: See the Use the Look up Feature for additional information on using the operands to search.</p>



Step	Action
13.	<p>Enter the desired information into the Short Supplier Name field. Enter "CARDINAL".</p> <div style="border: 2px solid yellow; width: 150px; height: 20px; margin: 10px 0;"></div>


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Step	Action
14.	Click the Look Up button. 
15.	Click the 000001396 - CARDINAL HEALTH - MEDICAL PROD & SVCS link. 
16.	Line (continued) The <i>Category</i> and <i>Unit of Measure</i> field will remain blank on the <i>Requisition Defaults</i> page. This information will be entered on the <i>Maintain Requisition</i> page for each line item. NOTE: Entering Category and/or Unit of Measure information on this page may cause problems with saving the requisition.
17.	Line (continued) The <i>Supplier Location</i> may or may not display when the <i>Supplier ID</i> is entered. If the location displays, leave it as defaulted.

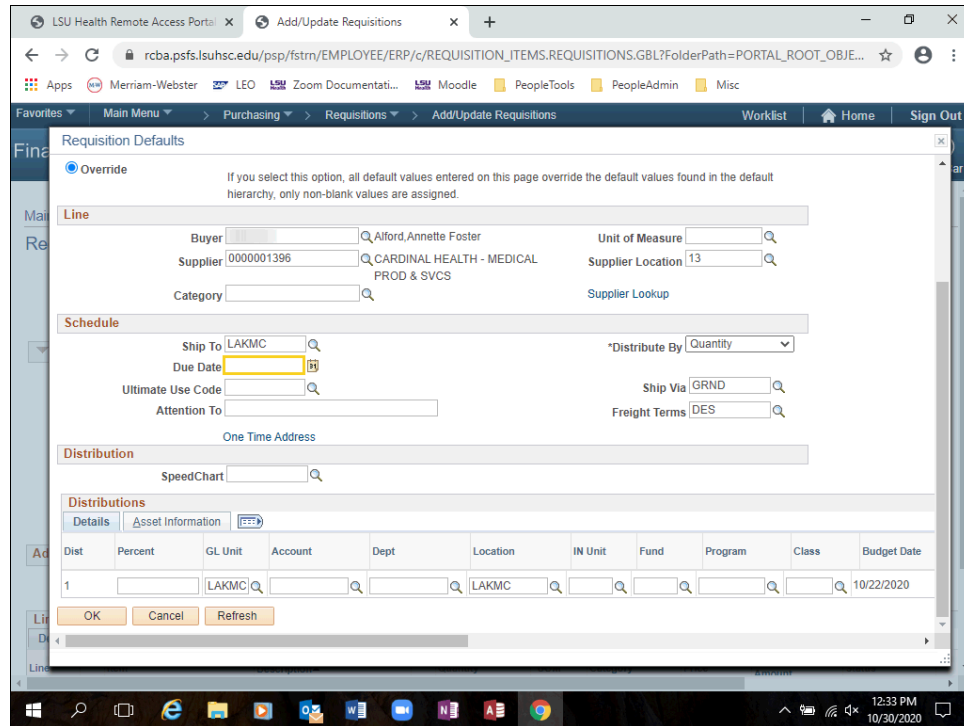
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Step	Action
18.	<p>Schedule</p> <p><i>Ship To</i> is the <i>Business Unit</i> designation for the facility where the item(s) will be shipped. This generally Receiving.</p> <p>Enter the desired information into the Ship To field. Enter "LAKMC".</p> 
19.	<p>Due Date</p> <p>Although the <i>Due Date</i> is not a required field, in order to save the requisition and generate a requisition number, the requester should enter the <i>Due Date</i>, if known, as follows:</p> <p><i>The Due Date is the last date the requester expects to receive the merchandise.</i></p> <ul style="list-style-type: none"> • One-time Orders: the due Date is the expected date of delivery. • Blanket Orders or Standing Orders: The Due Date is the last day of the last month merchandise is expected to be delivered. <p>To enter today's date, enter a 'T' into the Due field and click the Refresh button.</p>
20.	<p>Dates Boxes</p> <p>Enter a date by one of the following methods:</p> <ol style="list-style-type: none"> 1. To view the calendar and select the date, click the Calendar icon to the right of the Due Date field. Once you have selected the month and year, if necessary, click on the date to select it. 2. Enter the date (mmddy) – PeopleSoft requires 6 digits be entered, but you do not have to enter the slashes between the month, day, and year (e.g., mmddy). The system will automatically populate the slashes when you move to another field or you can click the Refresh button to populate them.

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Step	Action
21.	Enter the desired information into the Due Date field. Enter " 110520 ". <div style="border: 2px solid red; width: 100px; height: 20px; margin-top: 5px;"></div>
22.	<p>Distribute By</p> <p>You may distribute funds to which the item(s) is being charged by <i>Quantity</i> or <i>Amount</i>. Generally, when purchasing physical items, funds are distributed by quantity and services by amount. Most Blanket Orders are distributed by amount.</p> <p>In this exercise you are purchasing gloves, so you will distribute by Quantity.</p>

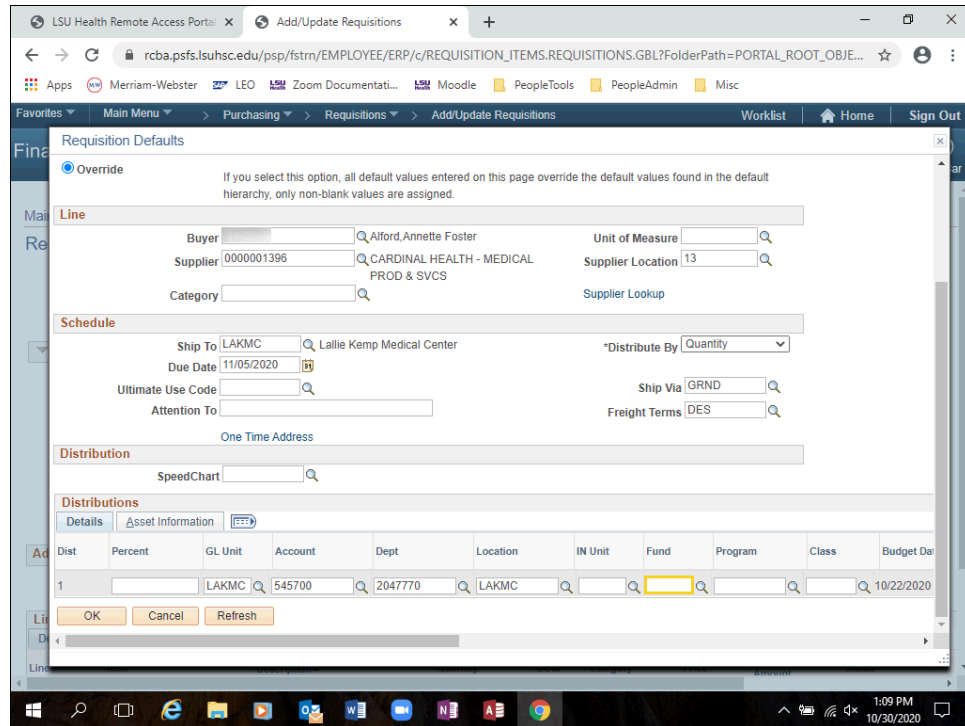
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Step	Action
23.	<p>Distributions</p> <p><i>Account</i> is a transaction code for the item(s) being ordered. Line items may have different account codes. If so, <i>Account</i> will be left <i>blank</i> and you must enter the account information for each line item on the <i>Distribution</i> page. Below is a list of commonly used <i>Account</i> codes. Your Purchasing department can provide you with the correct account number if it is not listed below.</p> <p>Automotive & Truck Supplies - 540700 Computer Software - 542200 Computer Supplies - 542700 Food Supplies - 543700 Hospital Drugs - 544200 Household Supplies - 544700 Laundry & Linen Supplies - 545600 Medical and Dental Supplies - 545700 Office Supplies - 546700 Other Supplies - 547200</p>
24.	<p>Enter the desired information into the Account field. Enter "545700".</p> <div data-bbox="345 919 518 968" style="border: 2px solid yellow; width: 100px; height: 23px; margin-left: 10px;"></div>
25.	<p>Distributions (continued)</p> <p>The <i>Dept</i> is the 7- digit department number to which item(s) will be charged.</p> <p>Enter the desired information into the Dept field. Enter "2047770".</p> <div data-bbox="345 1163 518 1211" style="border: 2px solid yellow; width: 100px; height: 23px; margin-left: 10px;"></div>
26.	<p>NOTE: If ordering for LKWHS, LKORU, or LKCMS, enter the appropriate Business Unit into the "IN Unit" field</p>

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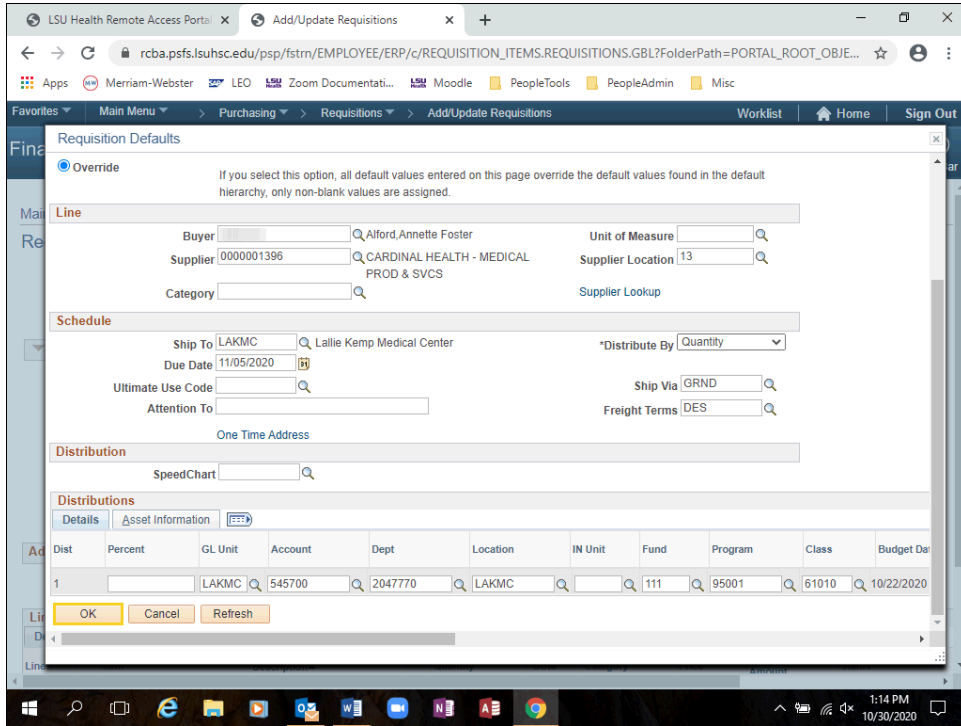
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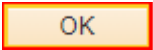


Step	Action
27.	Enter the desired information into the Fund field. Enter " 111 ". 
28.	Enter the desired information into the Program field. Enter " 95001 ". 
29.	Enter the desired information into the Class field. Enter " 61010 ". 

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Step	Action
30.	Click the OK button. 
31.	This completes <i>Step 2: Enter Accounting Date and Defaults</i> . End of Procedure.

Step 3: Enter Item Information


Procedure

In this topic you will learn **Step 3: Enter Item Information**.

Step	Action
1.	<p><i>NOTE: If ordering items for LKWHS, LKORU, or LKCMS, you can search for the specific Item by entering the Item ID in the Item field text box or by searching for it. This will populate the Description, UOM, and Category</i></p> <p><i>After entering an item, you may be prompted with a message stating, “Priority supplier for item does not match the default supplier. Use priority supplier?” Select the “No” option.</i></p>
2.	<p>Line</p> <p>A description must be entered for each line item. The description is entered on the <i>Details</i> page in the <i>Transaction Item Description</i> box rather than in the <i>Description</i> field on Line 1. The <i>Details</i> page icon is to the right of the line number on the left side of the line.</p>

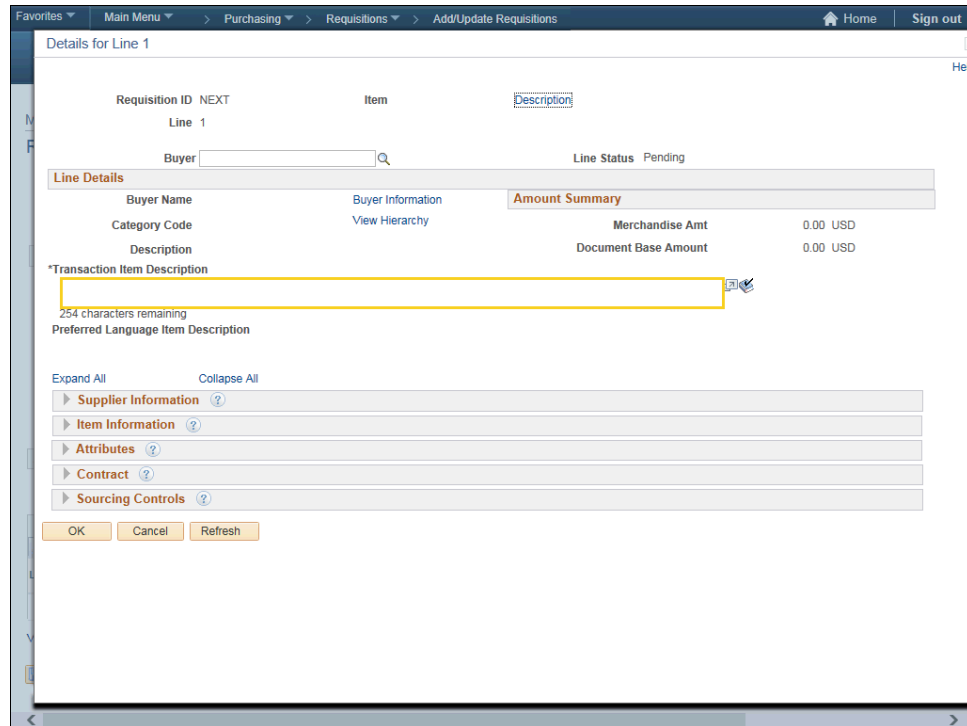
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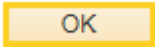
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Step	Action
3.	<p>Click the Details button.</p> 
4.	<p>Transaction Item Description</p> <p>The <i>Transaction Item Description</i> is a PeopleSoft required field. Information entered into the <i>Transaction Item Description</i> field must be in ALL CAPS. The field displays 254 characters. If your item description contains more than 254 characters, the system will automatically truncate it down to 254 characters. Additional description information may be included as a line comment if needed. A spell check icon, a blue book with a check mark on top, is provided to the right of the field for convenience.</p> <p>Supplier catalog information may be entered into the field to assist in relaying information to Purchasing.</p>

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Step	Action
5.	Enter the desired information into the Transaction Item Description field. Enter "GLOVE NITRILE CHEMOBLUE 8ML MED - CS= 4 BOX/100 EACH OR 400 EACH" . 
6.	Click the OK button. 
7.	Description Only 20 characters display at a time in the <i>Description</i> field. Use the up and down arrows to the right of the field to view additional information.

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Financials TRN w2

Navigator Search Advanced Search Add To Notification NavBar

Maintain Requisitions

Requisition

Business Unit LAKMC Status Pending
 Requisition ID NEXT Budget Status Not Chk'd
 Requisition Name Copy From Hold From Further Processing

Header

*Requester O'Connor, Karen
 *Requisition Date 10/22/2020 Requester Info
 Origin ONL On-Line Entry
 *Currency Code USD US Dollar
 Accounting Date 10/22/2020

Requisition Defaults Add Comments Amount Summary
 Requisition Activities Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Line

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




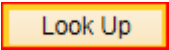


Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		GLOVE NITRILE	0.0000			0.00000	0.00	Pending

View Printable Version View Approvals *Go to More...

Save Notify Refresh

Step	Action
8.	<p>Line (continued)</p> <p>The <i>Quantity</i> defaults to zero. Delete all zeros in the field before entering the <i>Quantity</i> to prevent input errors. The <i>Quantity</i> can only be entered in whole numbers (e.g., 1, 2, 3, etc.). Partial boxes, cases, etc. cannot be ordered. The system will populate the decimal and trailing zeros when the page is refreshed.</p> <p>Enter the desired information into the Quantity field. Enter "4".</p>
9.	<p>Line (continued)</p> <p>In this exercise you are ordering cases of gloves. You will search for the UOM for case.</p> <p>Click the Look up UOM button.</p>
10.	<p>Enter the desired information into the Unit of Measure field. Enter "CA".</p>
11.	<p>Click the Look Up button.</p>

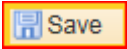
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Step	Action
12.	<p>Click the CAS link.</p> 
13.	<p>Line (continued)</p> <p>The Category is a value from the State Inventory Tables and is the State Commodity Code. You must look up the appropriate Category code for each line item. DO NOT enter the generic code of 00000.</p> <p>Click the Look up Category button.</p> 
14.	<p>Enter the desired information into the Description field. Enter "GLOVE".</p> 
15.	<p>Click the Look Up button.</p> 
16.	<p>Click the 47541 - GLOVES, DISPOSABLE, MEDICAL TY link.</p> 
17.	<p>Line (continued)</p> <p>When entering the Price, you must include the <i>decimal</i> point to indicate <i>cents</i>.</p> <p>Enter the desired information into the Price field. Enter "162.68".</p> 

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The screenshot shows the 'Maintain Requisitions' page in the Financials TRN v2 system. The requisition is for 'GLOVE NITRILE' with a quantity of 4.0000 and a price of 162.68. The Merchandise Amount is 0.00. The status is Pending. The form includes fields for Business Unit (LAKMC), Requisition ID (NEXT), Requester (O'Connor, Karen), Requisition Date (10/22/2020), Origin (ONL), and Currency Code (USD). There are buttons for Save, Notify, and Refresh.

Step	Action
18.	<p>It is recommended that you <i>Save</i> the requisition after entering each line item so line errors are easily identified if a <i>Save Error</i> message is received. The <i>Save Error</i> message does not identify which line item has an error. This also allows you to validate the information entered.</p> <p><i>NOTE: The Merchandise Amount (quantity x price) defaults when the page is either refreshed or saved.</i></p> <p>Click the Save button.</p> 
19.	<p>When the requisition is saved for the first time, the system will assign a Requisition ID to the requisition. The Requisition ID is not the PO Number. A separate PO number will be issued.</p>

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Financials TRN w2

Navigator Search Advanced Search Add To Notification NavBar

Maintain Requisitions

Requisition

Business Unit LAKMC
Requisition ID 0014280
Requisition Name 0014280

Status Open
Budget Status Not Chk'd

Hold From Further Processing

Header

*Requester O'Connor, Karen
*Requisition Date 10/22/2020
Origin ONL
*Currency Code USD
Accounting Date 10/22/2020



Amount Summary
Total Amount 650.72 USD

Add Items From
Purchasing Kit Catalog
Item Search Requirer Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		GLOVE NITRILE	4.0000	CAS	47541	162.68000	650.72	Open

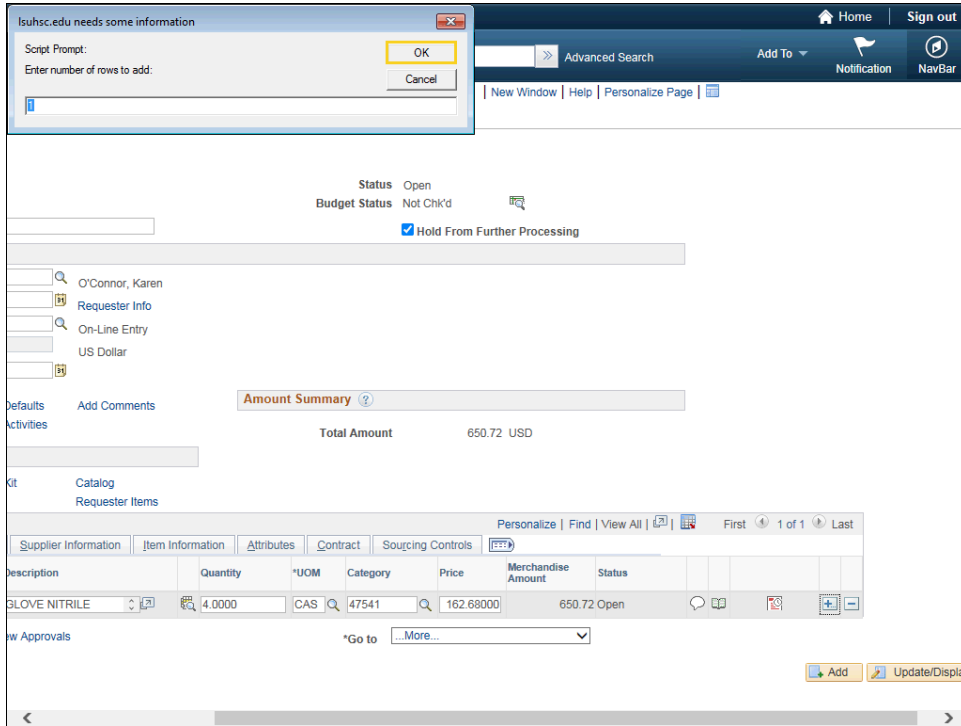
View Printable Version View Approvals *Go to ...More...

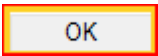
Save Notify Refresh

Step	Action
20.	Click the Right button of the scrollbar. 
21.	Line (continued) Rows may be added if two or more line items are being entered. It is not necessary to return to the <i>Requisition Defaults</i> page when rows are being added. Click the Add multiple new rows at row 1 button. 

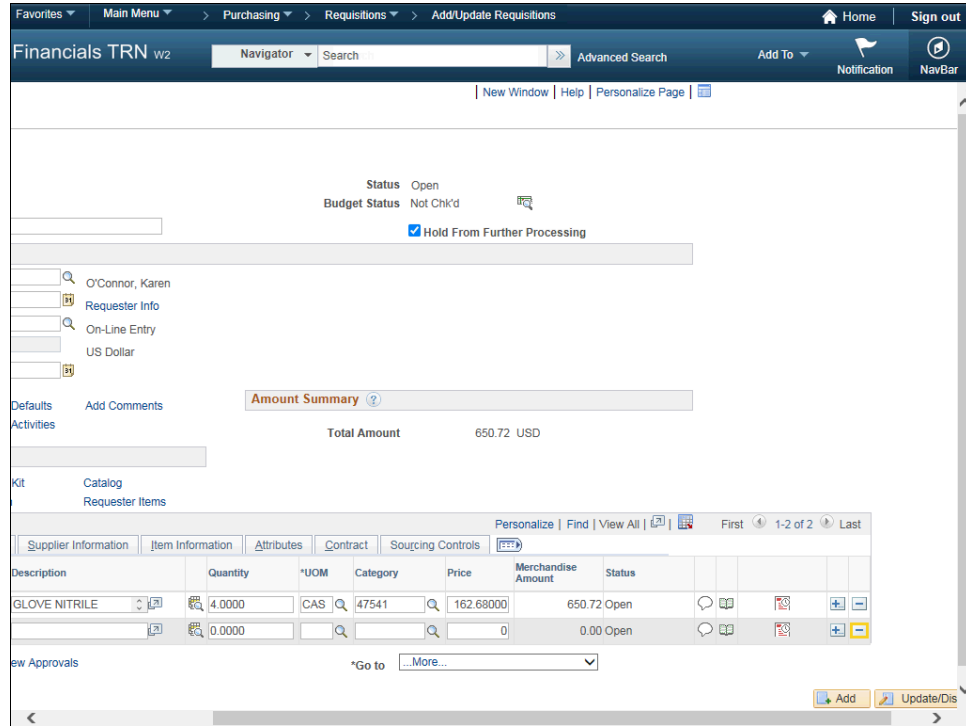
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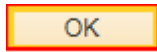
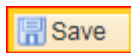
Managing Requisitions 9.2 HCSD



Step	Action
22.	<p>A prompt box display asking how many rows you wish to add. The system defaults to add one row. You may add as many rows as needed however, blank rows cannot be saved. It is recommended you add no more than five (5) lines at a time.</p> <p>Click the OK button.</p> 

Training Guide Managing Requisitions 9.2 HCSD



Step	Action
23.	<p>Line (continued)</p> <p>You would enter line information on Line 2 as you did for Line 1. For training purposes only, you will delete Line 2.</p> <p>Click the Delete row 2 button.</p> 
24.	<p>A warning message display asking if you want to delete the row.</p> <p>Click the OK button.</p> 
25.	<p>Each time there is a <i>change</i>, you must Save the requisition.</p> <p>Click the Save button.</p> 

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Step	Action
26.	<p>If the requisition is <i>incomplete</i>, do not <i>uncheck</i> the <i>Hold From Further Processing</i> box so you may continue to work on the requisition.</p> <p>If the requisition is <i>complete</i>, you <u>must</u> <i>uncheck</i> the <i>Hold From Further Processing</i> box so the requisition will move to the approver's worklist.</p> <p><i>NOTE: Information cannot be added to the requisition once the Hold From Further Processing box is unchecked without notifying the approver that changes have occurred.</i></p> <p>For <u>training purposes</u> the Hold From Further Processing box will remain checked.</p>
27.	<p>This completes <i>Step 3: Enter Item Information.</i></p> <p>End of Procedure.</p>

Step 4: Uncheck Hold From Further Processing and Save the Requisition

Procedure

In this topic you will learn **Step 4: Uncheck Hold From Further Processing and Save a Requisition.**

Step	Action
1.	<p><u>SCENARIO</u></p> <p>In this exercise you will:</p> <ul style="list-style-type: none"> • Uncheck Hold from Further Process and • Save the requisition.


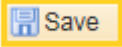
The screenshot displays the 'Maintain Requisitions' interface for a Requisition. Key elements include:

- Business Unit:** LAKMC
- Requisition ID:** 0014280
- Requisition Name:** 0014280
- Status:** Pending
- Budget Status:** Not Chk'd
- Hold From Further Processing:** (highlighted in yellow)
- Header Section:** Includes fields for Requester (O'Connor, Karen), Requisition Date (10/22/2020), Origin (ONL), Currency Code (USD), and Accounting Date (10/22/2020).
- Amount Summary:** Total Amount: 650.72 USD
- Line Item Table:**

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		GLOVE NITRILE	4.0000	CAS	47541	162.68000	650.72	Pending

Training Guide

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Step	Action
2.	<p>Once all items have been added to the requisition, the <i>Hold From Further Processing</i> box must be <i>unchecked</i>. If the <i>Hold From Further Processing</i> box is not unchecked, the requisition is not able to advance through the Purchasing process.</p> <p>Click the Hold From Further Processing option.</p> 
3.	<p>You must Save the requisition once the Hold From Further Processing box is unchecked. Saving the requisition advances the requisition to the Approver or Purchasing.</p> <p>Click the Save button.</p> 
4.	<p>This completes <i>Step 4: Uncheck Hold From Further Processing and Save a Requisition.</i> End of Procedure.</p>

3 Optional Steps

Step 5: Enter Header and/or Line Comments

Procedure

In this topic you will learn **Step 5: Enter Header and/or Line Comments**.

Step	Action
1.	<p>Header</p> <p>Comments may be added to a requisition at the Header level using the Add Comments link. Users should only enter information that applies to the entire requisition (e.g. new supplier information, suggested suppliers for bid, address for mailing the Purchase Order when the supplier has multiple locations, etc.) at the Header level. Specific shipping or delivery instructions applicable to all line items may also be entered at the Header level.</p>
2.	<p>Header (continued)</p> <p>The procedure for Adding Comments at the <i>Header</i> level is the <u>same</u> as adding comments at the <i>Line</i> level. Comments added at the Header level will display before all line item information on the requisition.</p>
3.	<p>NOTE: This exercise will demonstrate adding comments at the Line level.</p>
4.	<p>Line Comments</p> <p>Comments may be added for a line item on the Line Comments page. Added comments will display and print with the corresponding line item on the requisition. Comments added to the Line Comments page will apply to that specific line item only.</p> <p>NOTE: The method used to for adding comments for line items is the same method used for adding comments at the Header level.</p>

Training Guide

Managing Requisitions 9.2 HCSD

Financials TRN w2 Requisitions Search Advanced Search Add To Notification NavBar

Maintain Requisitions
Requisition


Business Unit LAKMC Status Pending
Requisition ID 0014280 Budget Status Not Chk'd
Requisition Name 0014280 Hold From Further Processing

Header
 *Requester O'Connor, Karen
 *Requisition Date 10/22/2020
 Origin ONL
 *Currency Code USD
 Accounting Date 10/22/2020

Amount Summary
Total Amount 650.72 USD

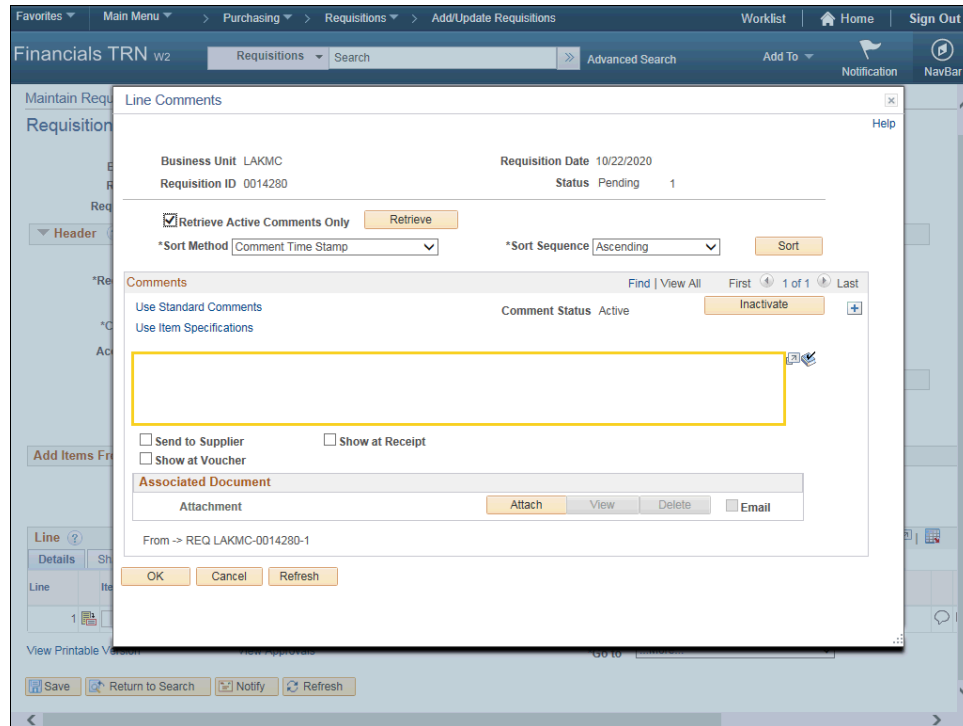
Line
 1 GLOVE NITRILE 4.0000 CAS 47541 162.68000 650.72 Pending


Line Comments button highlighted with a yellow box.

Step	Action
5.	<p>In this exercise you will enter line item comments.</p> <p>Click the Line Comments button.</p> 
6.	<p>Comments boxes are free-form text, but it is recommended not more than half a page of data be entered into a box. The number of boxes available for use is unlimited. You can copy and paste information from another application, such as Word, or from the Web. Each comments box also has a Spell Check feature.</p> <p>You can opt to send comments electronically, or deliver a hard copy to Purchasing referencing the Requisition ID if the comments are lengthy. In the next section, attaching a document to the Line Comments page will be demonstrated.</p>
7.	<p>The Use Standard Comments and Use Item Specific Specifications links are not used.</p>

Training Guide

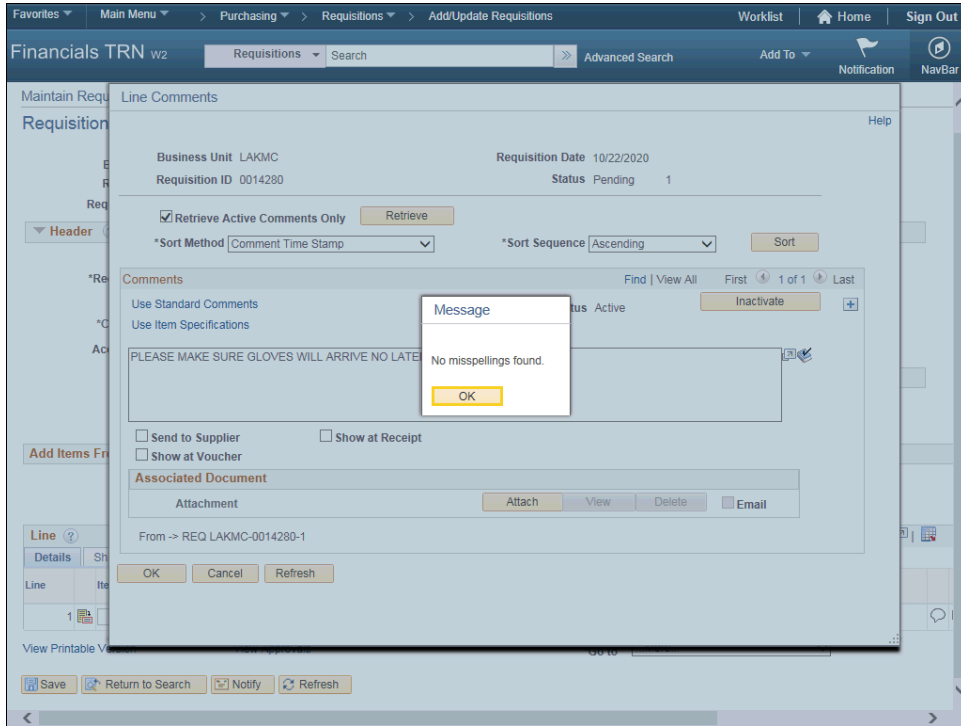
Managing Requisitions 9.2 HCSD



Step	Action
8.	<p>Purchasing will be able to see any comments entered in <i>Header Comments</i> or <i>Line Comments</i>.</p> <p>Enter the desired information into the Comments field. Enter "PLEASE MAKE SURE GLOVES WILL ARRIVE NO LATER THAN 11/5/20.".</p> <div data-bbox="440 1192 1373 1304" style="border: 2px solid yellow; height: 50px; width: 100%;"></div>
9.	<p>Click the Spell Check Comment Text button.</p> <div data-bbox="440 1367 492 1413" style="border: 2px solid yellow; display: inline-block; text-align: center; vertical-align: middle;">  </div>

Training Guide

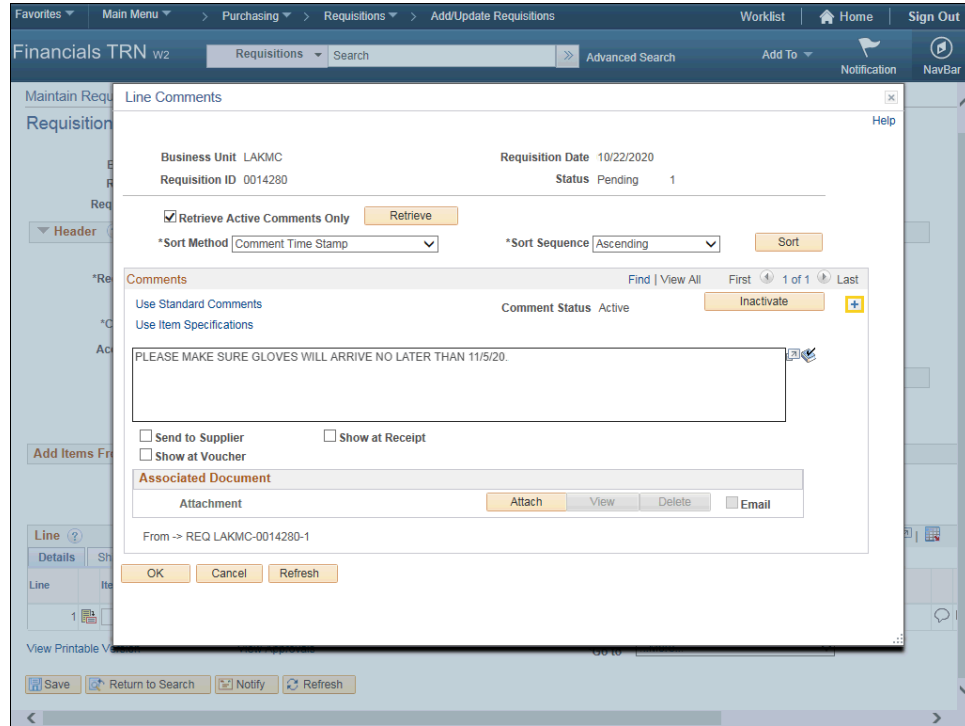
Managing Requisitions 9.2 HCSD



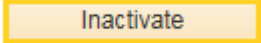


Step	Action
10.	<p>The <i>Spell Check</i> feature works the same as it does in Word. Misspelled words are highlighted and alternate spellings provided. Care should be taken when using the Change feature.</p> <p>Click the OK button.</p> <p>OK</p>
11.	<p>The <i>Send to Supplier</i>, <i>Show at Voucher</i>, and <i>Show at Receipt</i> checkboxes will remain as defaulted. Purchasing will check these boxes if needed.</p>

Training Guide

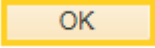
Managing Requisitions 9.2 HCSD

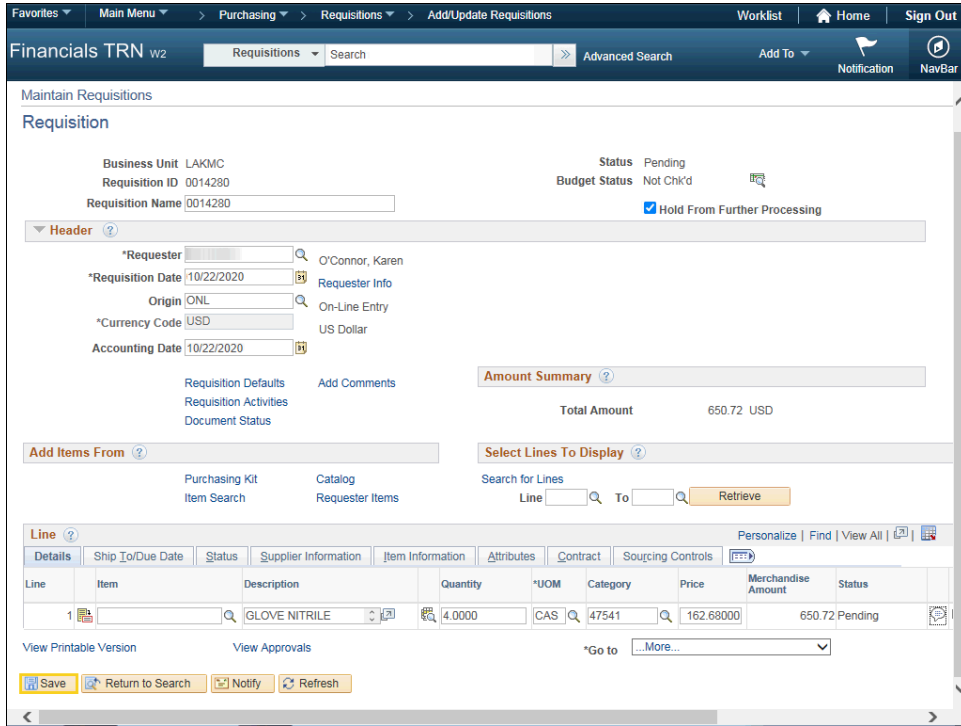


Step	Action
12.	<p>Comment boxes can be added by clicking the plus sign (+) to the right of the Inactivate button. Only one comment box can be added at a time.</p> <p>Click the Add a new row at row 1 button.</p> 
13.	<p>The new comment box displays. Comment boxes are independent of each other. Use the <i>View All</i> line to view all comment boxes at the same time.</p> <p>Click the View All link.</p> 
14.	<p>Comment boxes cannot be deleted, but the Inactivate button can remove the Comment box from the requisition. Blank Comment boxes will not be saved. When you click the Inactivate button, any text in the box will be grayed out. the box will be removed when you navigate away from the page and save the requisition.</p> <p>Click the Inactivate button.</p> 
15.	<p>The Undo button allows you to <i>reactivate</i> a Comment box <i>before</i> navigating away from the page. Once you navigate away from the page, the Comment box will have to be re-entered.</p>

Training Guide

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Step	Action
16.	Click the OK button. 



Financials TRN v2 > Purchasing > Requisitions > Add/Update Requisitions

Requisition

Business Unit LAKMC Status Pending
 Requisition ID 0014280 Budget Status Not Chkd
 Requisition Name 0014280 Hold From Further Processing

Header

*Requester O'Connor, Karen
 *Requisition Date 10/22/2020 Requester Info
 Origin ONL On-Line Entry
 *Currency Code USD US Dollar
 Accounting Date 10/22/2020

Requisition Defaults Add Comments
 Requisition Activities
 Document Status

Amount Summary

Total Amount 650.72 USD

Add Items From


Purchasing Kit Catalog
 Item Search Requester Items

Select Lines To Display

Search for Lines
 Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	GLOVE NITRILE	4.0000	CAS	47541	162.68000	650.72	Pending

View Printable Version View Approvals *Go to More...

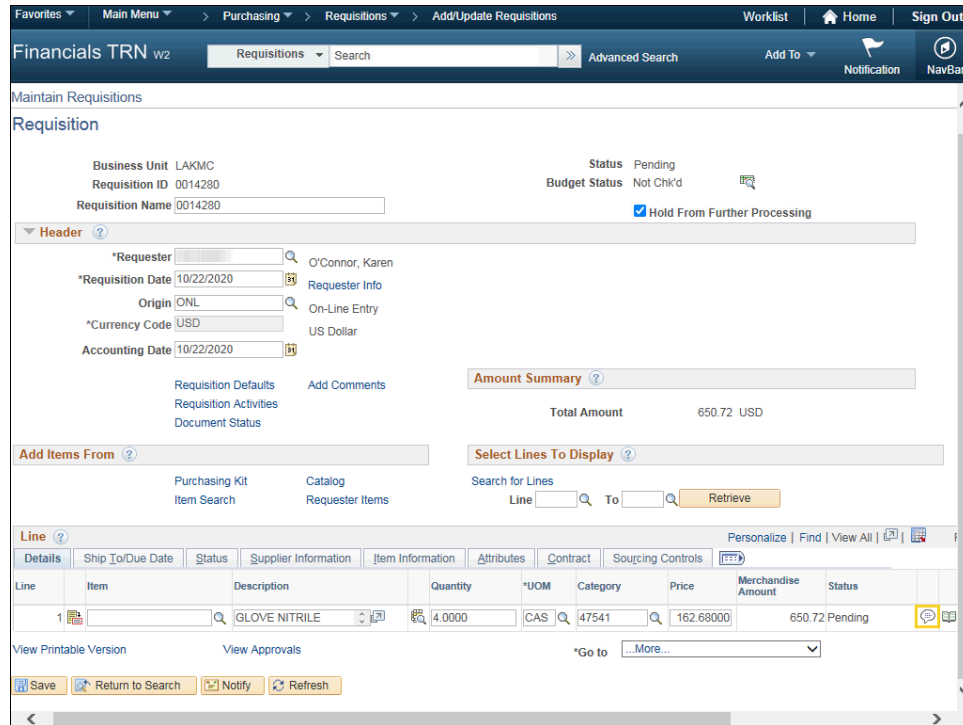
Step	Action
17.	Whenever changes are made to the requisition, you must save the requisition. Click the Save button. 
18.	The Line Comments bubble is now filled with blue dots indicating comments have been added to the line.
19.	This completes Step 5: Enter Header and/or Line Comments . End of Procedure.


Step 6: Attach a Document

Procedure

In this topic you will learn **Step 6: Attach a Document to a Requisition.**

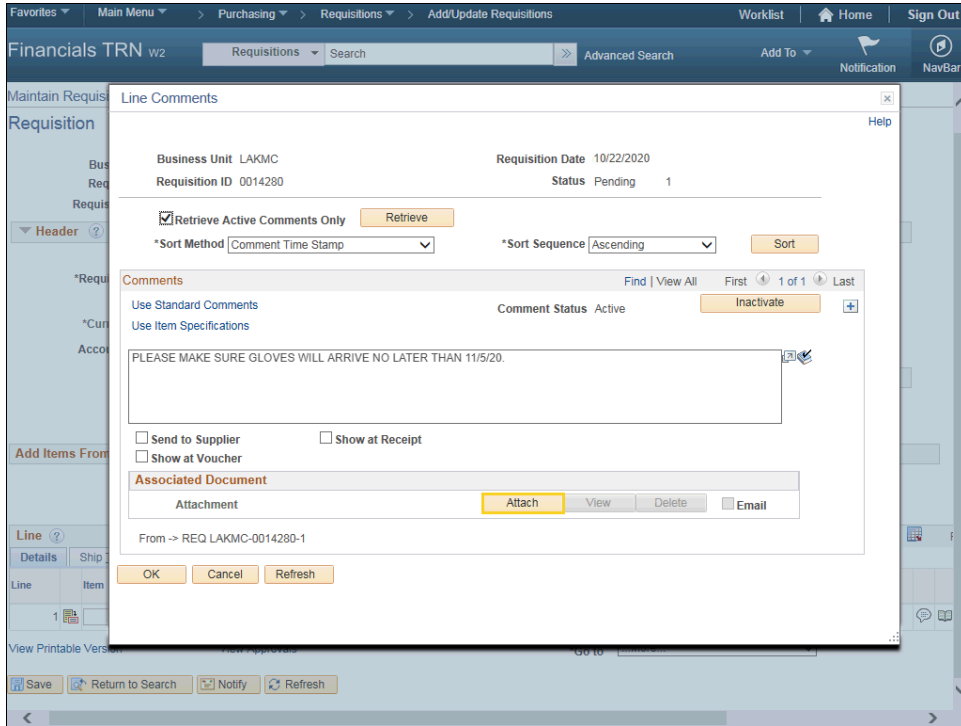
Step	Action
1.	<p><u>SCENARIO</u></p> <p>Documents can be attached, viewed and deleted from a requisition. In this exercise you will make the following changes to the Line Comments page:</p> <ul style="list-style-type: none"> • Attach a document to the requisition; • View the document on the Line Comments page; and • Delete the attachment from the Line Comments page.





Step	Action
2.	<p>Click the Line Comments button.</p> 

Training Guide

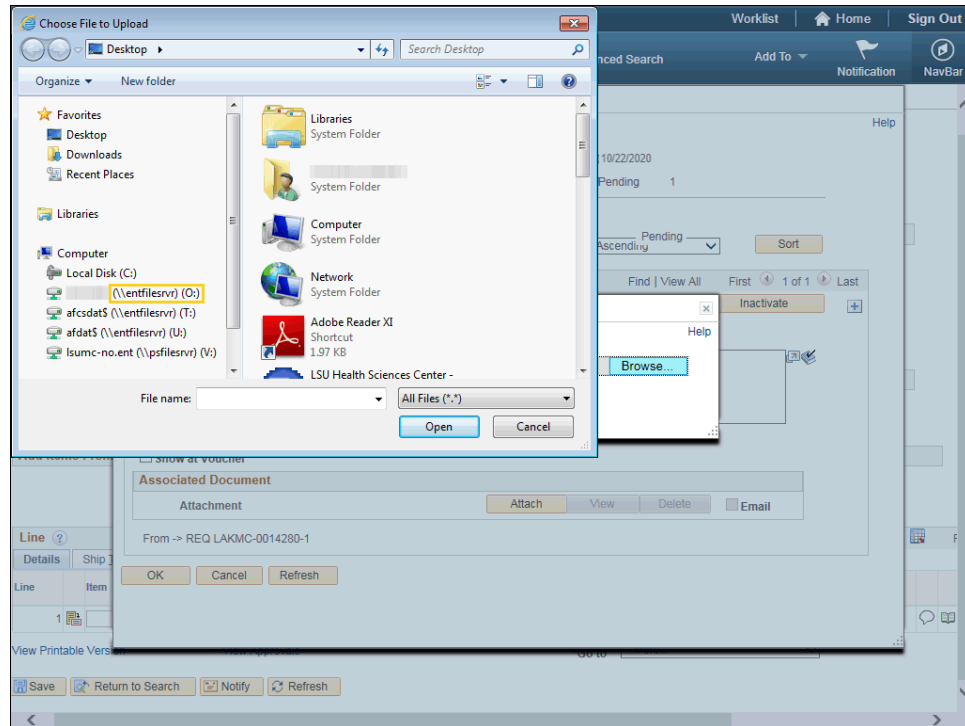
Managing Requisitions 9.2 HCSD



Step	Action
3.	<p>NOTE: <i>The word Attachment on the left side of the line is grayed out indicating this requisition currently does not have an attachment associated with it.</i></p> <p>Click the Attach button.</p> <p></p>
4.	<p>Enter the file location and name in the blank field, or click the Browse button to search for the file in your directory.</p> <p>Click the Browse button.</p> <p></p>

Training Guide

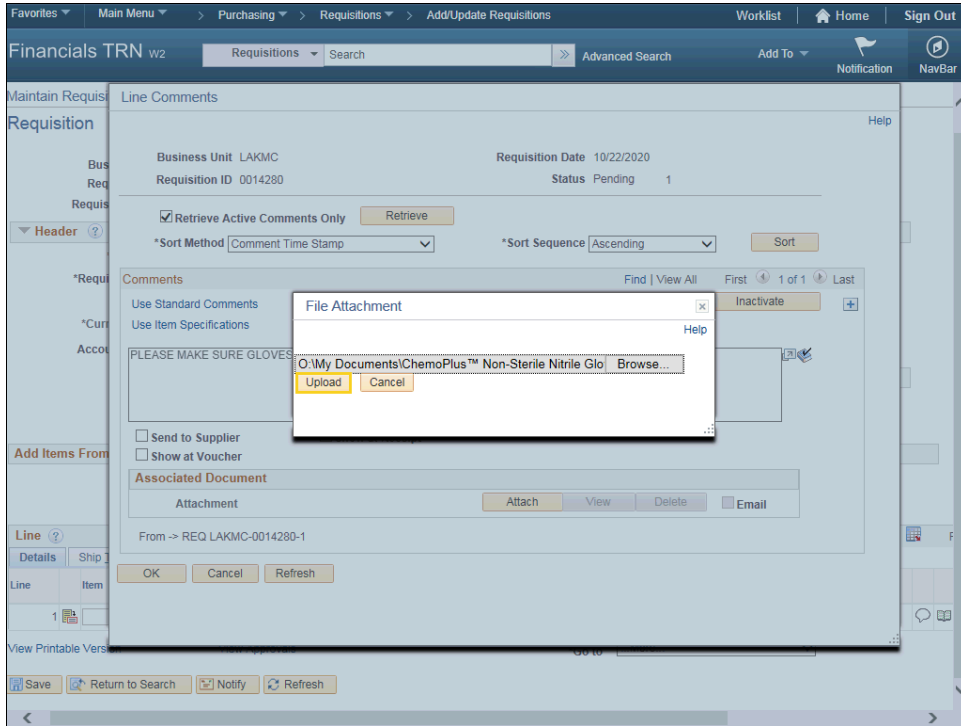
Managing Requisitions 9.2 HCSD

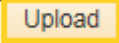



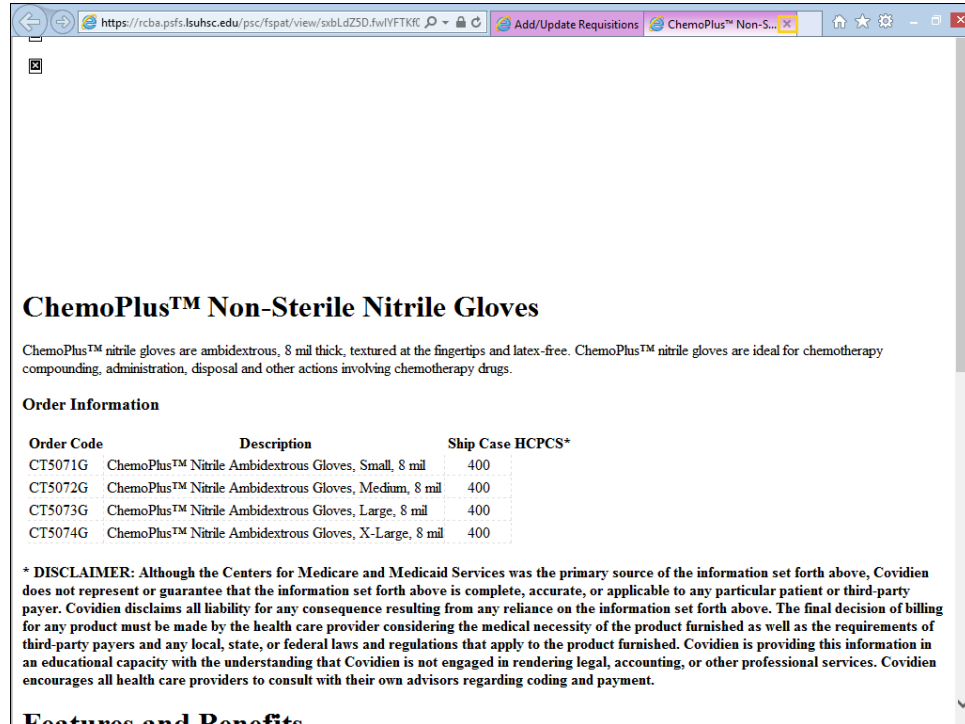
Step	Action
5.	<p>Either your computer or drive directory may display. If your computer directory displays, select your LSUHSC designated drive.</p> <p>Click the \\entfilesrvr (O:) tree item.</p> <p>\\entfilesrvr (O:)</p>
6.	<p>Double-click the My Documents list item.</p> <p>My Documents</p>
7.	<p>Locate and select the appropriate file.</p> <p>Click the ChemoPlus™ Non-Sterile Nitrile Gloves.htm list item.</p> <p>ChemoPlus™ Non-Sterile Nitrile Gloves.h...</p>
8.	<p>Click the Open button.</p> <p>Open</p>


Training Guide

Managing Requisitions 9.2 HCSD



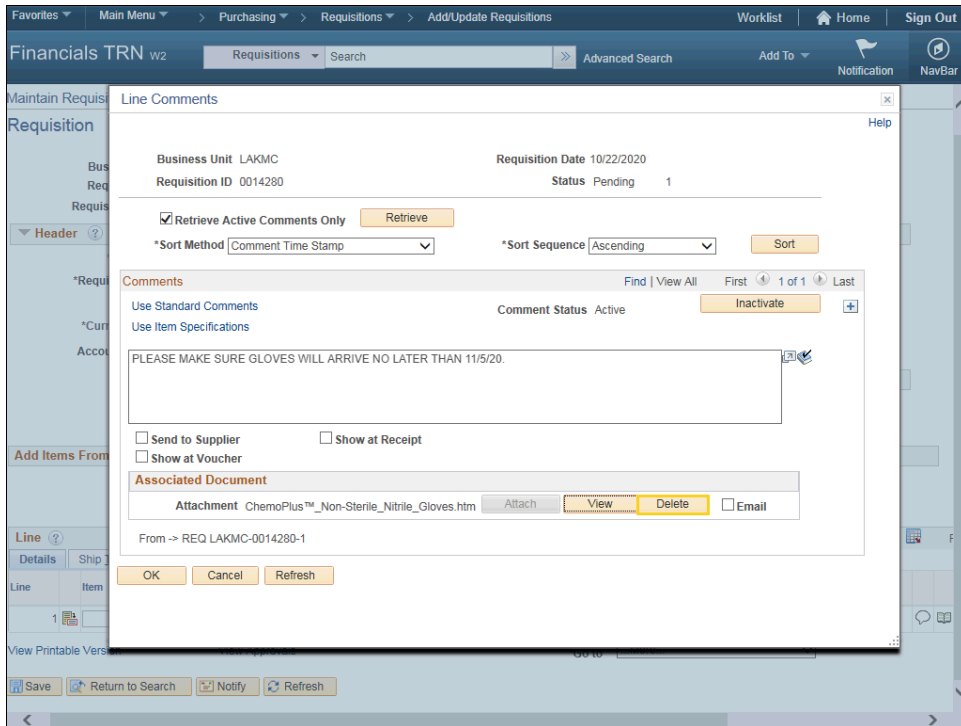
Step	Action
9.	Click the Upload button. 
10.	The name of the document displays to the right of the word <i>Attachment</i> . The system greys out the <i>Attach</i> button and the <i>View</i> and <i>Delete</i> button activate. NOTE: Once the attachment is added, the requisition <u>must be saved</u>. For <u>training purposes only</u>, you will not save the requisition until later in the exercise.
11.	Viewing the attachment will open a new window. NOTE: If a dialogue box displays asking if you want to open or save the file, click the <i>Open</i> button. Click the View button. 



Step	Action
12.	<p>No changes can be made to the document once it is attached to the requisition. If changes to the document are required, delete the attachment, make the changes to the original document, and then re-attach the revised document to the requisition.</p> <p>Click the Close button.</p> 

Training Guide

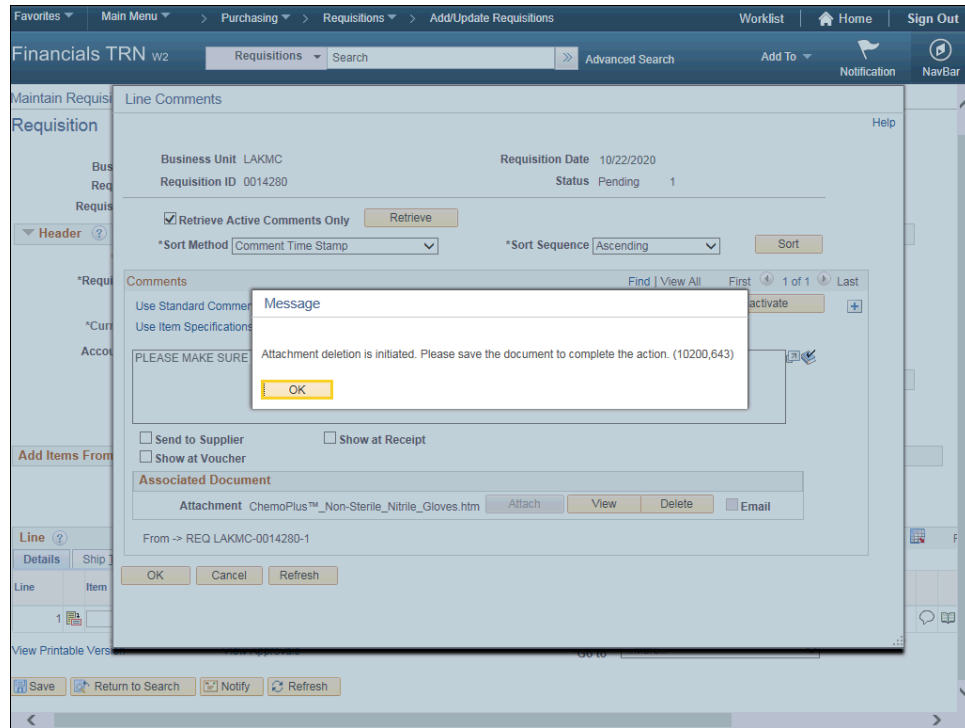
Managing Requisitions 9.2 HCSD

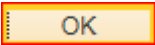


Step	Action
13.	<p>If the wrong document has been attached it can be removed from the <i>Comment</i> box.</p> <p>Click the Delete button.</p> <p style="text-align: center;">Delete</p>

Training Guide

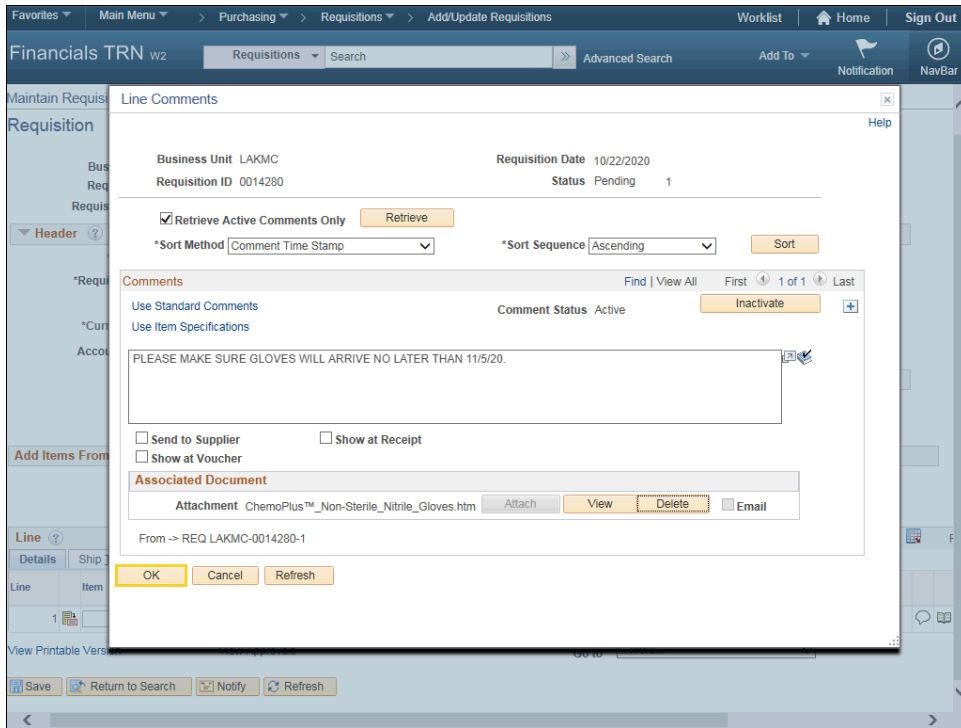
Managing Requisitions 9.2 HCSD



Step	Action
14.	<p>A warning message displays stating you must save the requisition for the delete process to complete.</p> <p>Click the OK button.</p> 

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Step	Action
15.	Click the OK button. <div style="border: 2px solid red; padding: 5px; display: inline-block; margin-top: 10px;">OK</div>

Training Guide

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Financials TRN v12 | Requisitions | Search | Advanced Search | Add To | Notification | NavBar

Maintain Requisitions
Requisition

Business Unit LAKMC | Status Pending
Requisition ID 0014280 | Budget Status Not Chk'd
Requisition Name 0014280 | Hold From Further Processing

Header

*Requester [] O'Connor, Karen
*Requisition Date 10/22/2020 | Requester Info
Origin ONL | On-Line Entry
*Currency Code USD | US Dollar
Accounting Date 10/22/2020

Requisition Defaults | Add Comments
Requisition Activities
Document Status

Amount Summary

Total Amount 650.72 USD

Add Items From

Purchasing Kit | Catalog
Item Search | Requirer Items

Select Lines To Display

Search for Lines
Line [] To [] Retrieve

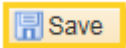
Line

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls | Personalize | Find | View All |

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	[]	GLOVE NITRILE	4,000	CAS	47541	162.68000	650.72	Pending

View Printable Version | View Approvals | *Go to ...More...

Save | Return to Search | Notify | Refresh

Step	Action
16.	<p>Click the Save button.</p> <p><i>NOTE: It is recommended that you Save changes to the requisition as they are made.</i></p> 
17.	<p>This completes <i>Step 6: Attach a Document to a Requisition.</i></p> <p>End of Procedure.</p>

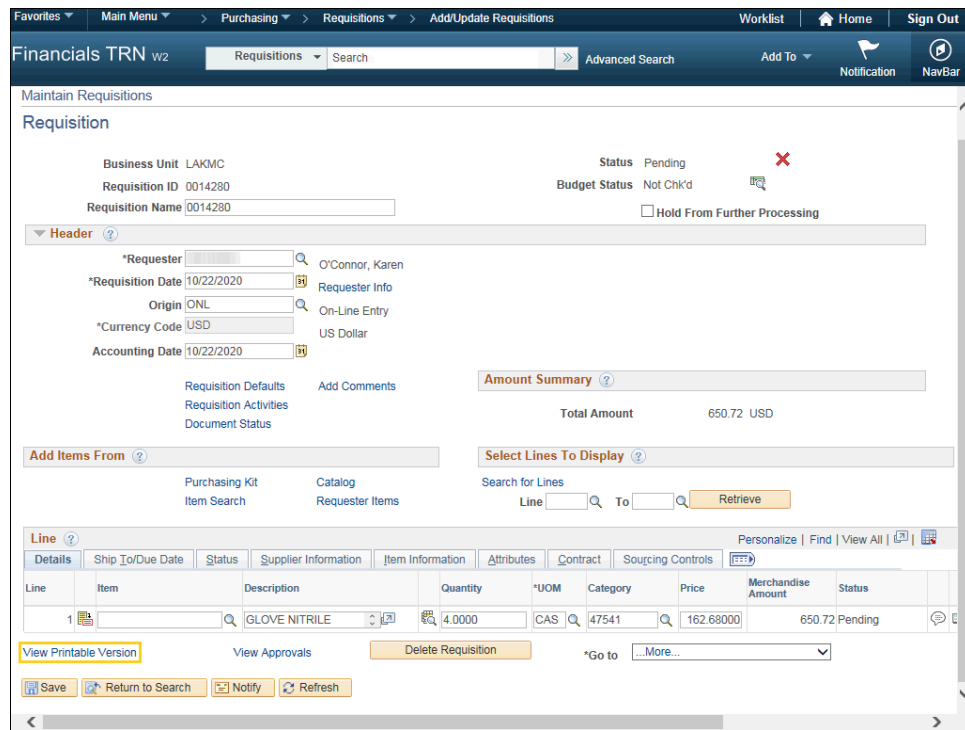
Training Guide
Managing Requisitions 9.2 HCSD

Step 7: Print a Requisition

Procedure

In this topic you will learn **Step 7: Print a Requisition**.

Step	Action
1.	<p>There are two methods available for printing a requisition: View Printable Version and accessing the Process Scheduler. Both methods will be demonstrated here. The View Printable Version method will be demonstrated first.</p> <p><i>NOTE: Only <u>ONE</u> requisition can be printed at a time.</i></p>

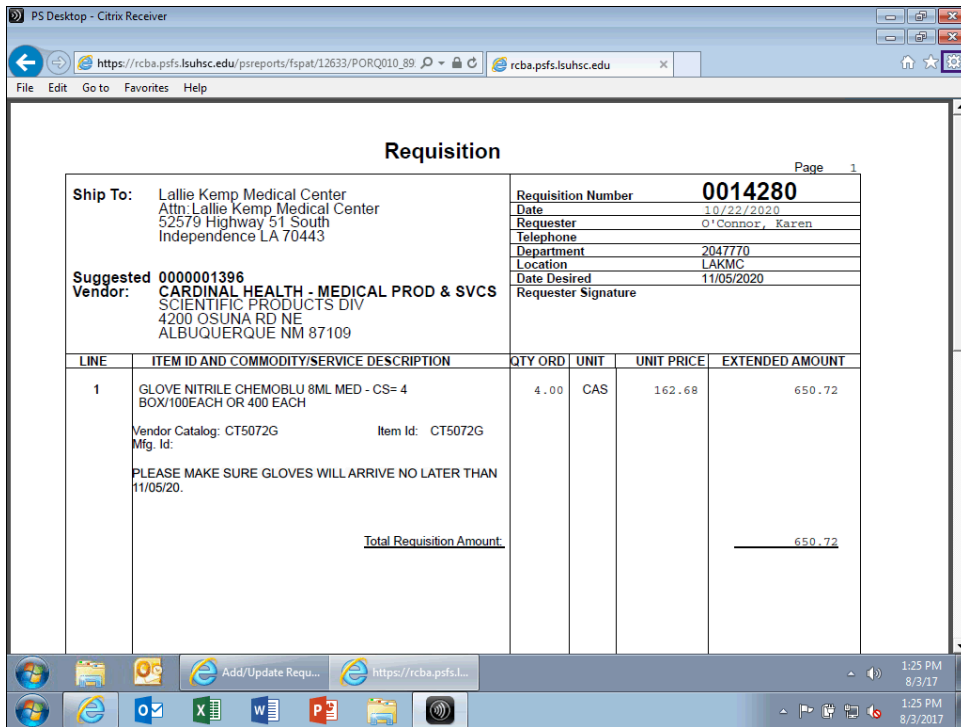




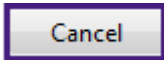
Step	Action
2.	<p>Click the View Printable Version link.</p> <p><i>NOTE: The View Printable Version button may not be used for printing purposes once the Requisition Status = Closed. The user <u>must print</u> the Requisition by following the steps beginning with Step 9 of this exercise once the Requisition Status = Closed.</i></p> <p style="text-align: center;">View Printable Version</p>

Training Guide



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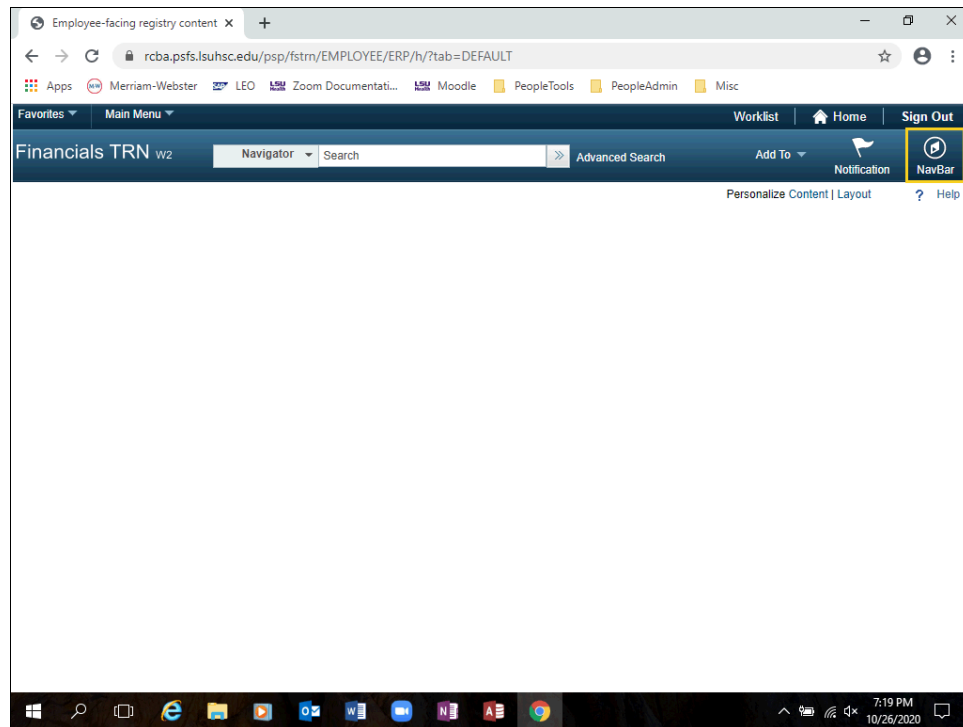
Step	Action
3.	<p>When the SQR Report box displays, the report status will display in the upper left hand corner of the page. The status may be <i>Queued, Processing, or Success</i>. When the status equals <i>Success</i>, a message line displays stating "<i>Preparing output for viewing.</i>" The report will open in the SQR box when processing completes.</p> <p>NOTE: The system also displays a "Waiting" message in the bottom left hand corner of the SQR box.</p>

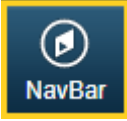
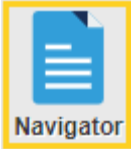


Step	Action
4.	<p>Click the Tools button.</p> 
5.	<p>Click the Print list item.</p> 
6.	<p>For <u>training purposes only</u>, click the Cancel button.</p> 

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Step	Action
7.	Click the Close button. <i>NOTE: Be sure to click the bottom red button to close the requisition.</i> 
8.	Click the Home link. 



Step	Action
9.	The Process Scheduler method will now be demonstrated. Click the NavBar button. 
10.	Click the Navigator button. 

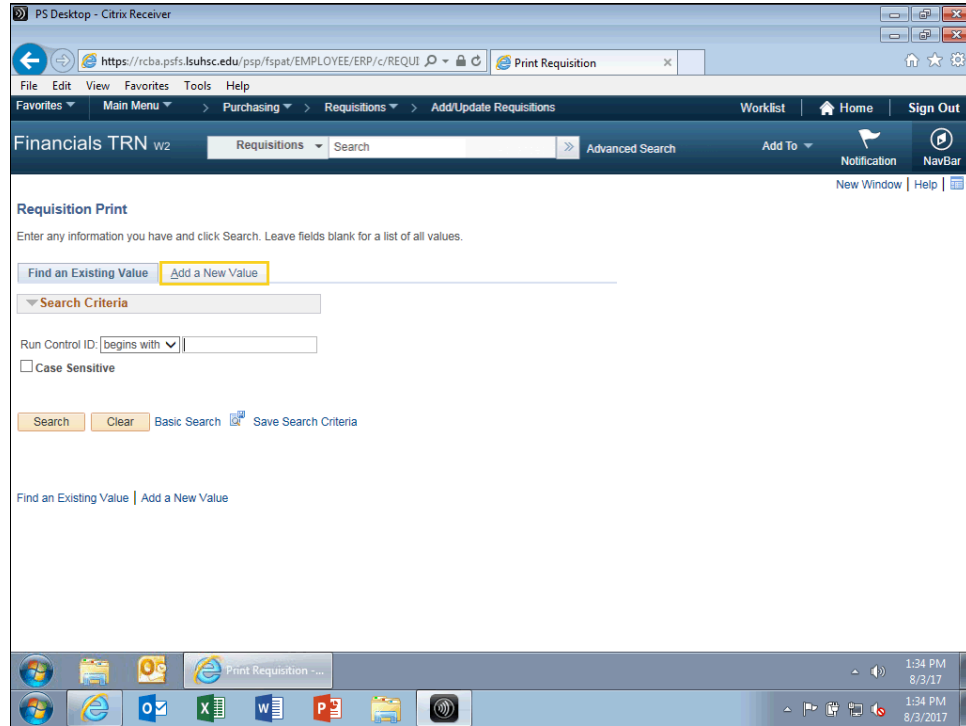
Training Guide





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Step	Action
11.	Click the Purchasing menu. 
12.	Click the Requisitions menu. 
13.	Click the Reports menu. 
14.	Click the Print Requisition menu. 
15.	The <i>first</i> time you use this method to print a requisition, you will need to <i>create</i> a <i>run control id</i> in order to access the Process Scheduler. New run control ids are created on the <i>Add a New Value</i> tab. The system <i>defaults</i> you into the <i>Find an Existing Value</i> tab, so on all subsequent prints you will be able to search for existing run control ids.

Training Guide


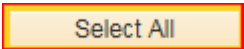

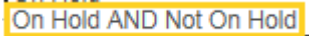
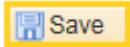
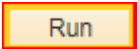

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Step	Action
16.	Click the Add a New Value tab. 
17.	Enter the desired information into the Run Control ID field. Enter " req_print ". <i>NOTE: See the Create/Find a Run Control ID topic in the Requisition Basic section for information on adding and finding run control ids.</i> 
18.	Click the Add button. 
19.	Enter the desired information into the Business Unit field. Enter " LAKMC ". <i>NOTE: When printing <u>future</u> requisitions, the page will populate with the parameters previously selected. Only the Requisition ID will need to be changed and saved. All other fields will remain as defaulted.</i> 


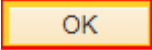








Training Guide

Managing Requisitions 9.2 HCSD

Step	Action
20.	<p>You may enter the requisition id directly into the Requisition ID field. It is highly recommended that you note the requisition id when attempting to print the requisition and enter it into the field. If you do not know the requisition id, you may search for it by clicking on the Look up Requisition ID button.</p> <p>Enter the desired information into the Requisition ID field. Enter "0014280".</p> 
21.	<p>NOTE: DO NOT enter From Date, Through Date, or Requester. If the information entered incorrectly, it may result in printing problems and prevent the requisition from printing. Since requisitions must be requested and printed one at a time, entering the requisition will be sufficient to identify the requisition.</p>
22.	<p>If you select the wrong status, it will prevent the requisition from printing (i.e., the requester checked Pending, but the requisition is already approved). By choosing the Select All option, you will be able to print the requisition regardless of the status.</p> <p>Click the Select All button.</p> 
23.	<p>Whether the Hold From Further Processing has been is turned on or off can also affect the printing of a requisition. If the Hold From Further Processing is still checked, and you select NOT on Hold, the requisition will not print.</p> <p>Click the button to the right of the Statuses to Include field.</p> 
24.	<p>By selecting the status of On Hold AND Not On Hold, you will be able to print the requisition regardless of the status of the Hold From further Processing checkbox.</p> <p>Click the On Hold AND Not On Hold list item.</p> 
25.	<p>Click the Save button.</p> 
26.	<p>Accessing the Process Scheduler</p> <p>The <i>Process Scheduler</i> defines the Run Location and Output Destination of the Print Request.</p> <p>Click the Run button.</p> 
27.	<p>Click the button to the right of the Server Name field.</p> 




Training Guide

Managing Requisitions 9.2 HCSD

Step	Action
28.	Click the PSNT list item. 
29.	The <i>Type</i> field should default as <i>Web</i> and the <i>Format</i> field should default as <i>PDF</i> . If the Type and Format field do not default properly, click the drop-down arrows associated with each and select the appropriate option.
30.	Click the OK button. 
31.	Click the Process Monitor link. 
32.	The run should Status = Success and the Distribution Status = Posted. Click the Refresh button every 10 - 15 seconds until the statuses change. Click the Refresh button. 
33.	Click the Go back to Requisition Print button. 
34.	Click the Report Manager link. 
35.	Click the Administration button. 
36.	The report is complete and ready for viewing when Requisition Print SQR under the Description column turns into a blue hyperlink and the <i>Status = Posted</i> . Click the Refresh button until the <i>Status = Posted</i> and the Requisition Print SQR link becomes active. The requisition will open and display in a new window. Click the Requisition Print SQR link. 
37.	Click the Tools button. 
38.	Click the Print list item. 

Training Guide

Managing Requisitions 9.2 HCSD

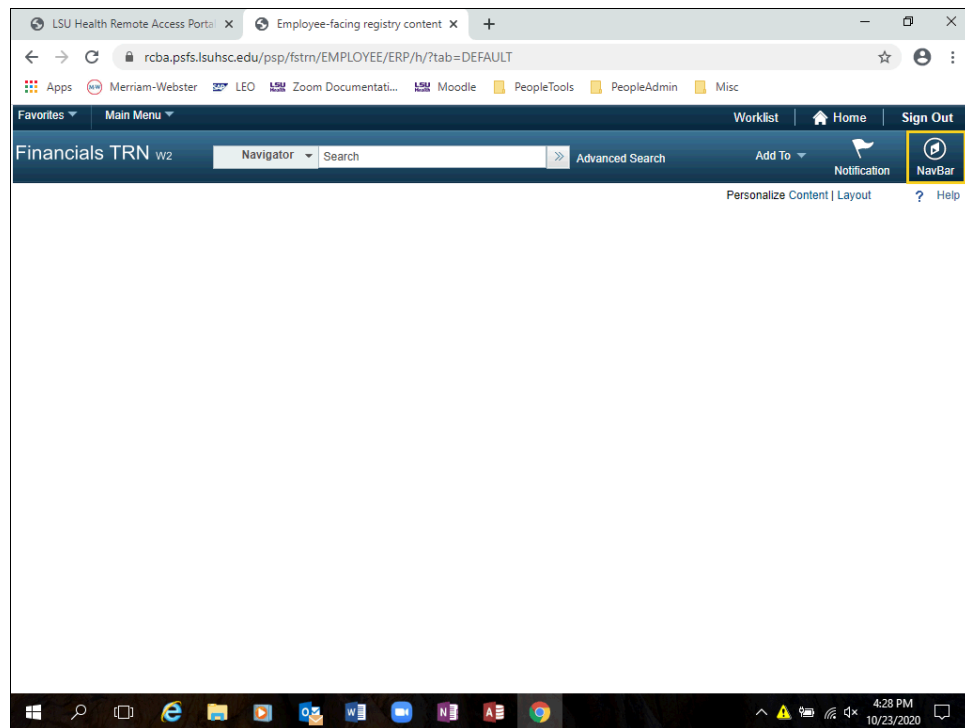
Step	Action
39.	For training purposes only , click the Cancel button. 
40.	Click the Close button. 
41.	Click the Go back to Requisition Print link. 
42.	This completes <i>Step 7: Print a Requisition</i> . End of Procedure.

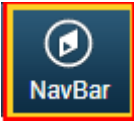
View an Existing Document and the Activity Log

Procedure

In this topic you will learn how to [View an Existing Requisition and the Activity Log](#).

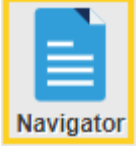



Step	Action
1.	<i>NOTE: The Activity Log provides the User ID of the person who entered, modified and/or approved the requisition, as well as the date and time that each was performed.</i>



Step	Action
2.	Click the NavBar button. 

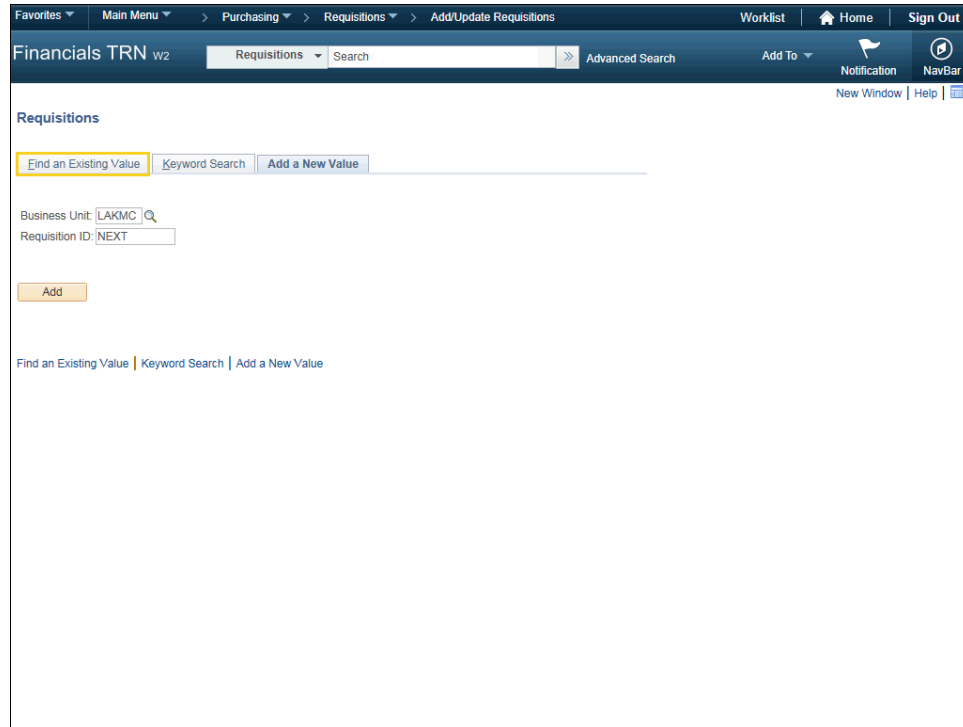
Training Guide



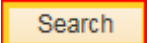
Managing Requisitions 9.2 HCSD

Step	Action
3.	Click the Navigator button.  The image shows a blue square icon with a white document symbol and three horizontal lines, representing a menu or navigation function. Below the icon, the word "Navigator" is written in a small, black, sans-serif font. The entire icon and text are enclosed in a yellow rectangular border.
4.	Click the Purchasing menu.  The image shows a rectangular button with a white background and a thin red border. The word "Purchasing" is centered in a blue, sans-serif font. To the right of the text is a small, grey chevron symbol pointing to the right.
5.	Click the Requisitions menu.  The image shows a rectangular button with a white background and a thin red border. The word "Requisitions" is centered in a blue, sans-serif font. To the right of the text is a small, grey chevron symbol pointing to the right.
6.	Click the Add/Update Requisitions menu.  The image shows a rectangular button with a white background and a thin red border. The text "Add/Update Requisitions" is centered in a blue, sans-serif font.

Training Guide


Managing Requisitions 9.2 HCSD

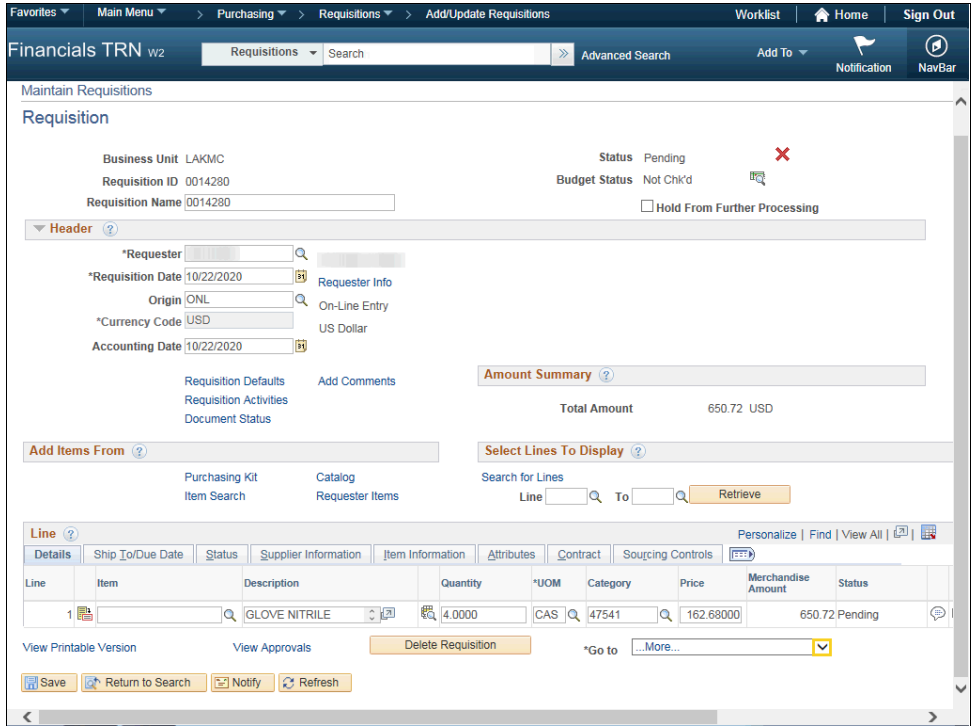


Step	Action
7.	Click the Find an Existing Value tab. 
8.	<p>Search for an Existing Requisition</p> <p>You must enter all or part of one of the following criteria to search for an existing requisition:</p> <ul style="list-style-type: none"> • Requisition ID – the view a specific requisition, or • Requester – to view a list of requisitions created by a specific person <p>The other search options are not recommended for use.</p> <p>NOTE: <u>Do not</u> check either the <i>Hold From Further Processing</i> or <i>Case Sensitive</i> box.</p>
9.	Enter the desired information into the Requester field. Enter " Your User ID ". 
10.	Click the Search button. 


Training Guide

Managing Requisitions 9.2 HCSD

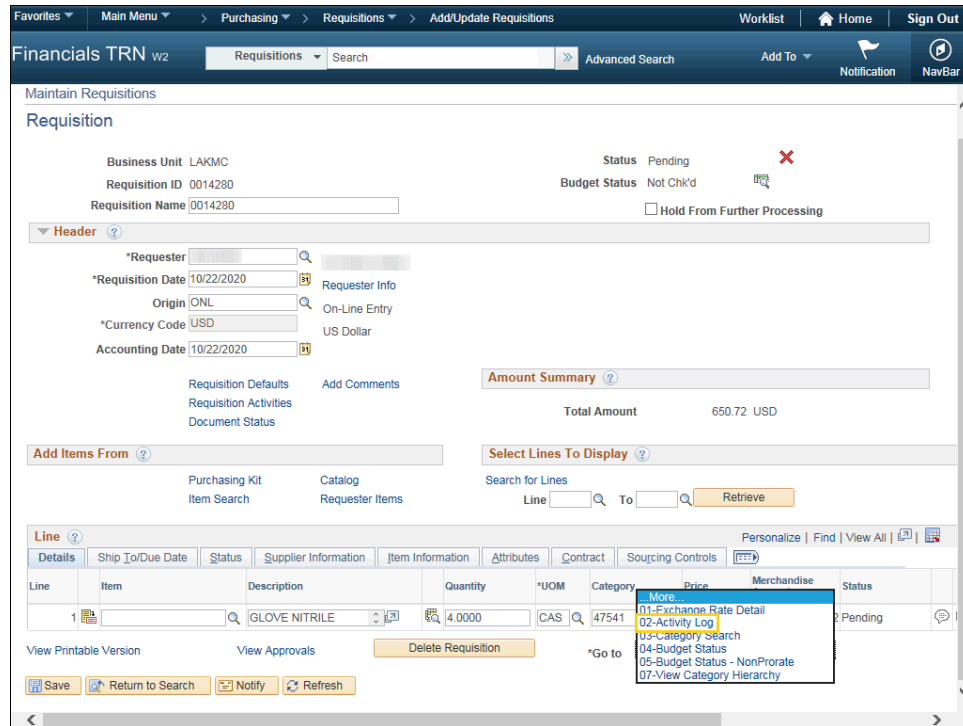
Step	Action
11.	Click the 0014280 link. 



The screenshot shows the 'Maintain Requisitions' page for Requisition ID 0014280. The requisition is in a 'Pending' status with a 'Budget Status' of 'Not Chk'd'. The total amount is 650.72 USD. The item being requisitioned is 'GLOVE NITRILE' with a quantity of 4.0000. At the bottom of the page, there is a 'Go to' field with a dropdown arrow, which is highlighted with a yellow box in the original image.

Step	Action
12.	Click the button to the right of the Go to field. 

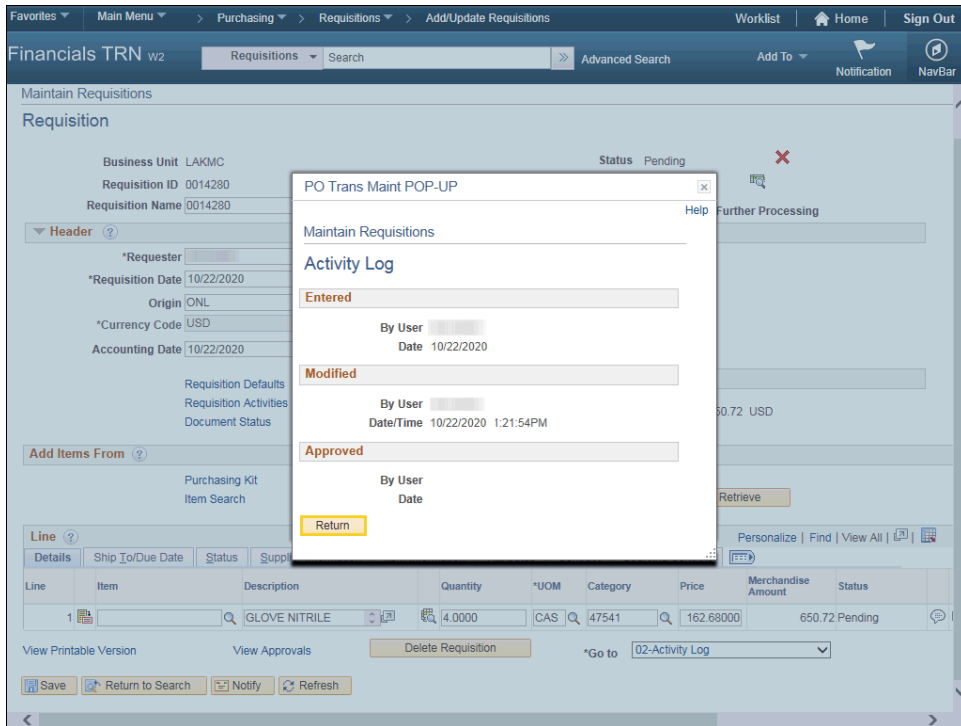
Training Guide Managing Requisitions 9.2 HCSD

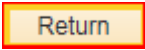


Step	Action
13.	Click the 02-Activity Log list item. <div style="border: 1px solid red; padding: 2px; display: inline-block;">02-Activity Log</div>
14.	The <i>Activity Log</i> indicates the following: <ul style="list-style-type: none"> • Entered – User ID of the requester and date requisition was entered; • Modified – User ID of the person who most recently made a change to the requisition and the date and time the change was made; and • Approved – User ID of the person who approved the requisition and the date and time it was approved.

Training Guide

Managing Requisitions 9.2 HCSD

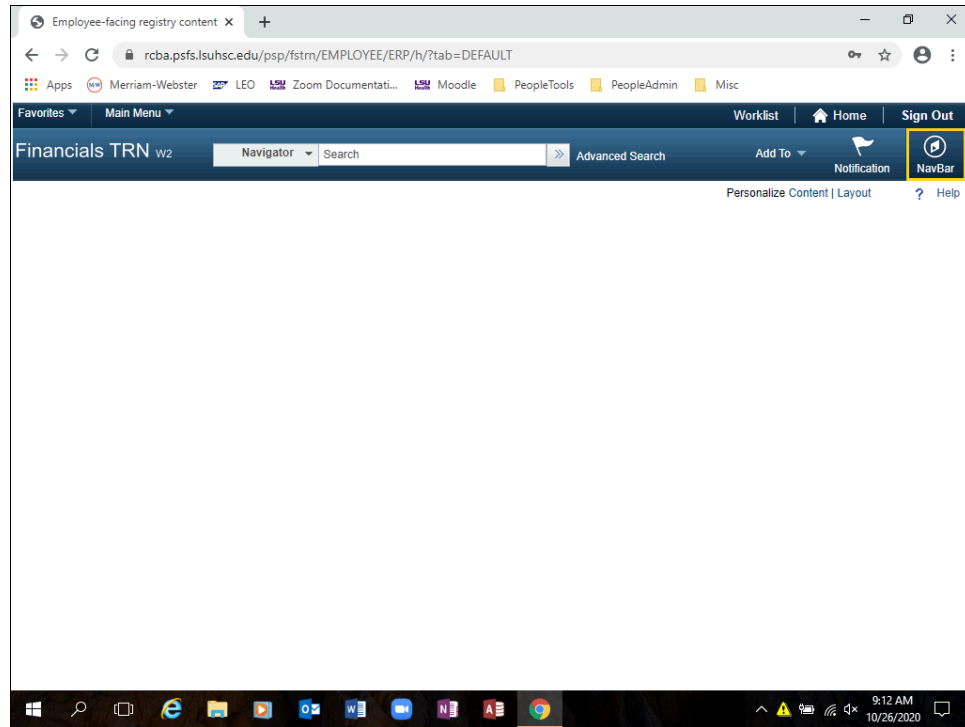


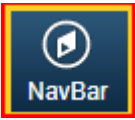
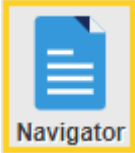

Step	Action
15.	Click the Return button. 
16.	This completes <i>View and Existing Requisition and the Activity Log</i> . End of Procedure.

Copy an Existing Requisition

Procedure



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

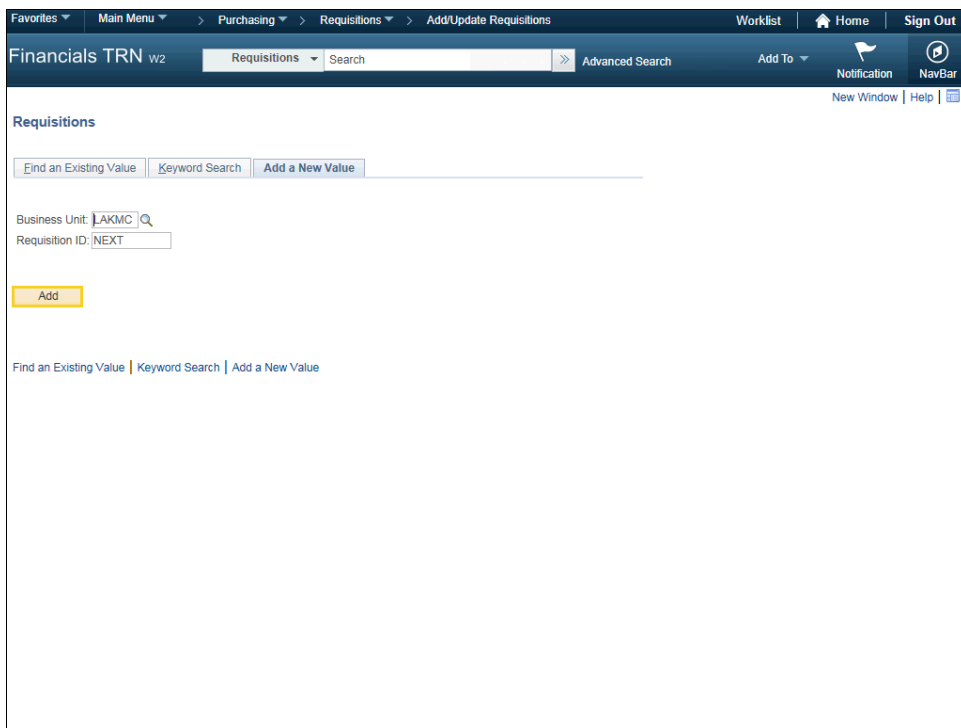



Step	Action
1.	Click the NavBar button. 
2.	Click the Navigator button. 
3.	Click the Purchasing menu. 

Training Guide

Managing Requisitions 9.2 HCSD

Step	Action
4.	Click the Requisitions menu. 
5.	Click the Add/Update Requisitions menu. 



Step	Action
6.	Click the Add button. 

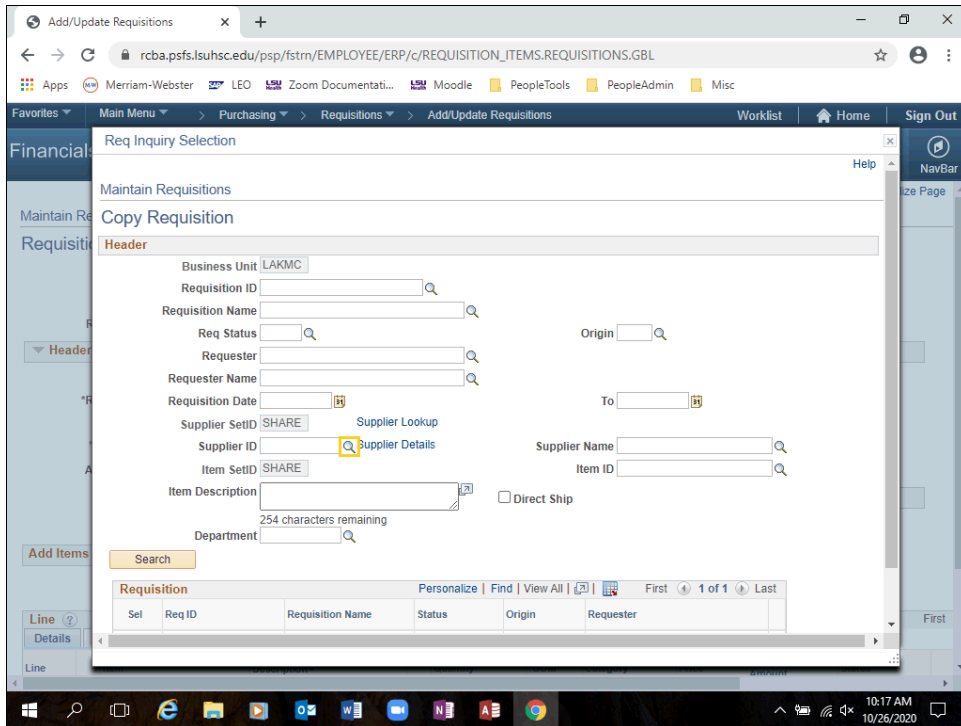
Training Guide


Managing Requisitions 9.2 HCSD

Step	Action
7.	Click the Hold From Further Processing option. <input type="checkbox"/> Hold From Further Processing
8.	Click the Copy From link. Copy From
9.	It is recommended you use one of the following fields to help focus your search for the requisition you wish to copy: <ul style="list-style-type: none"> • Requisition ID • Req Status • Requester • Supplier ID • Department
10.	<u>SCENARIO</u> In this exercise you search for the Supplier ID using the Supplier Short Name STERICYCLE. The requisition id number will be 0012895.

Training Guide

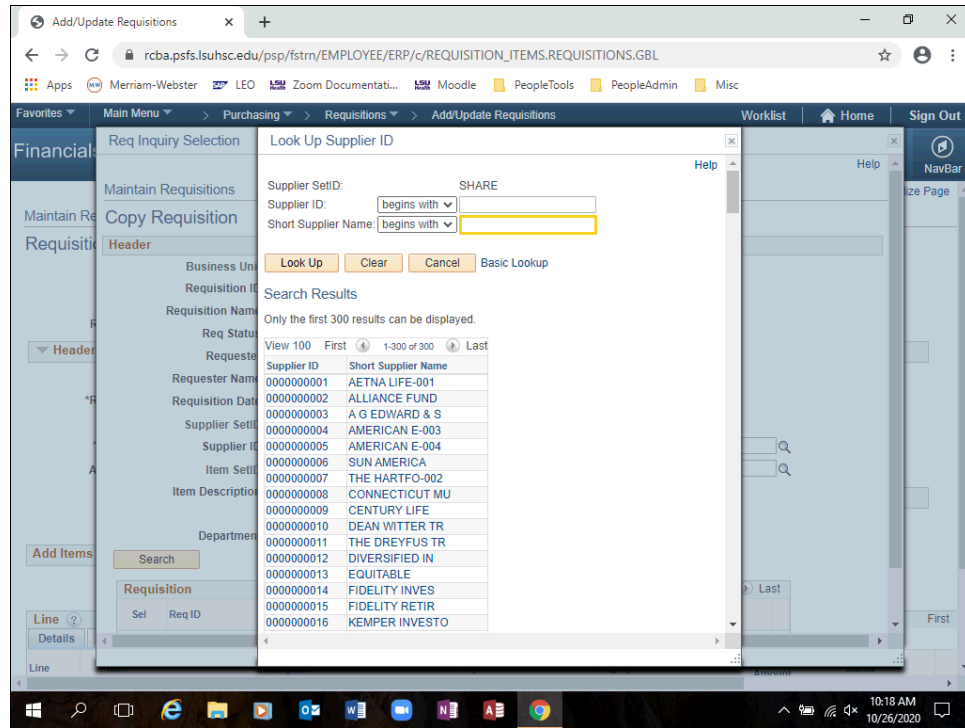
Managing Requisitions 9.2 HCSD



Step	Action
11.	Click the Look up Supplier ID button. 

Training Guide

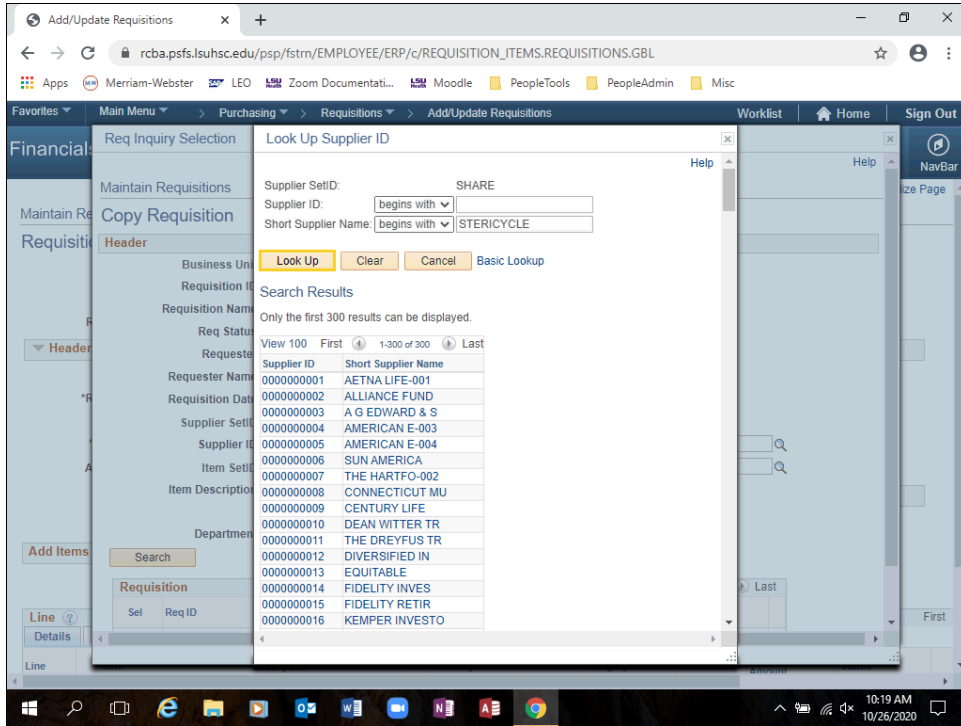
Managing Requisitions 9.2 HCSD



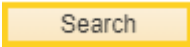


Step	Action
12.	Enter the desired information into the Short Supplier Name field. Enter "STERICYCLE" . <div style="border: 1px solid yellow; width: 150px; height: 20px; margin: 5px 0;"></div>

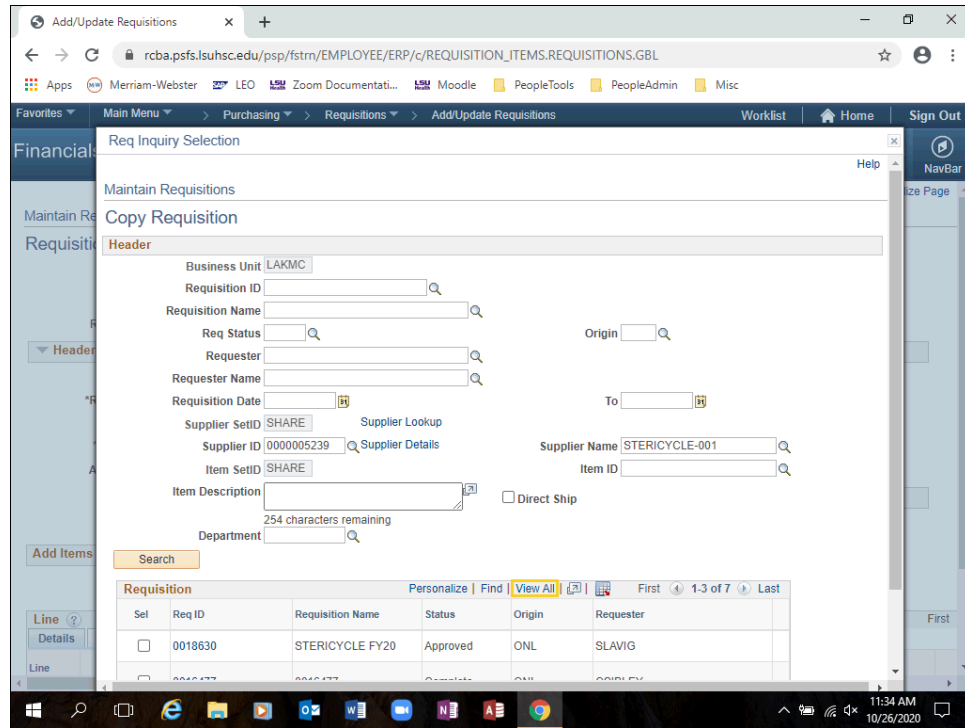
Training Guide

Managing Requisitions 9.2 HCSD



Step	Action
13.	Click the Look Up button. 
14.	Click the 000005239 link. 
15.	Click the Search button. 

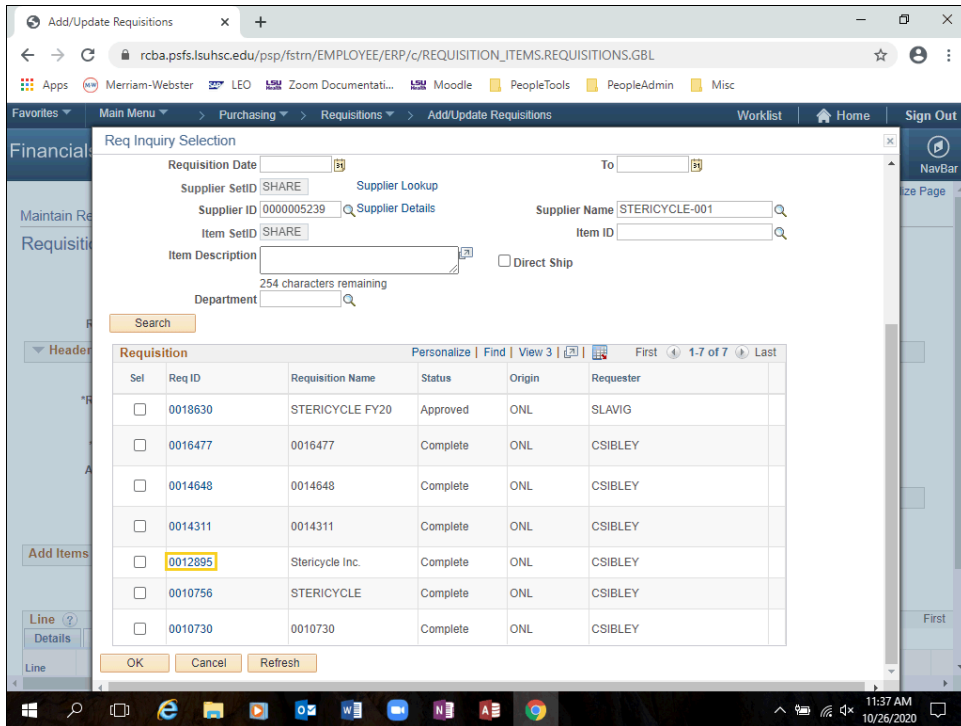
Training Guide Managing Requisitions 9.2 HCSD



Step	Action
16.	Click the View All link. View All

Training Guide

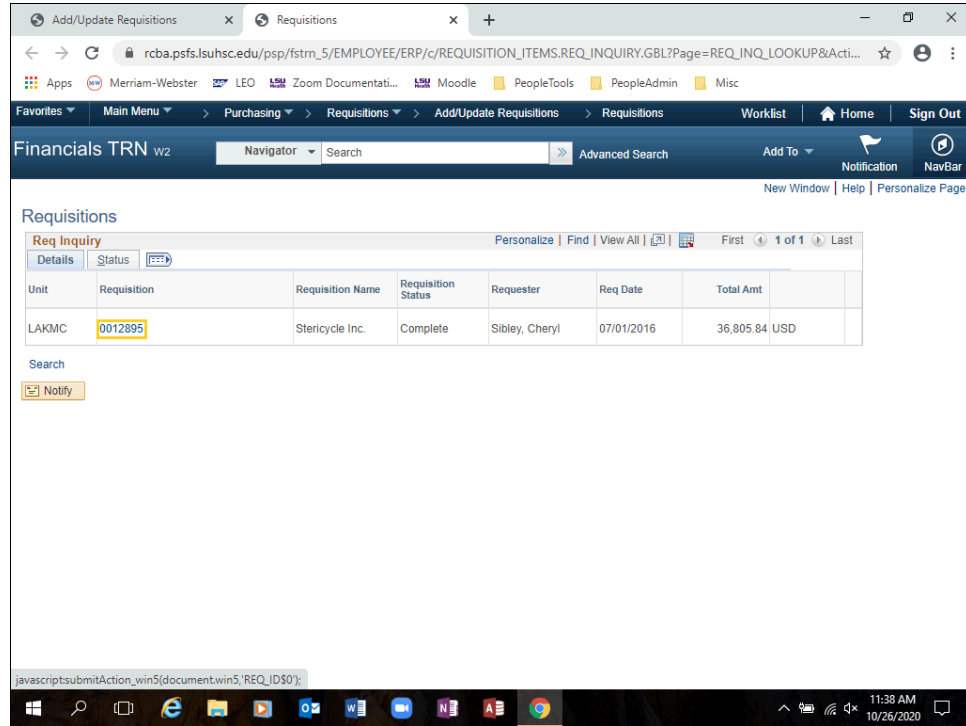
Managing Requisitions 9.2 HCSD



Step	Action
17.	<p>Click the 0012895 link.</p> <p>This will open a new window.</p> <p>0012895</p>

Training Guide

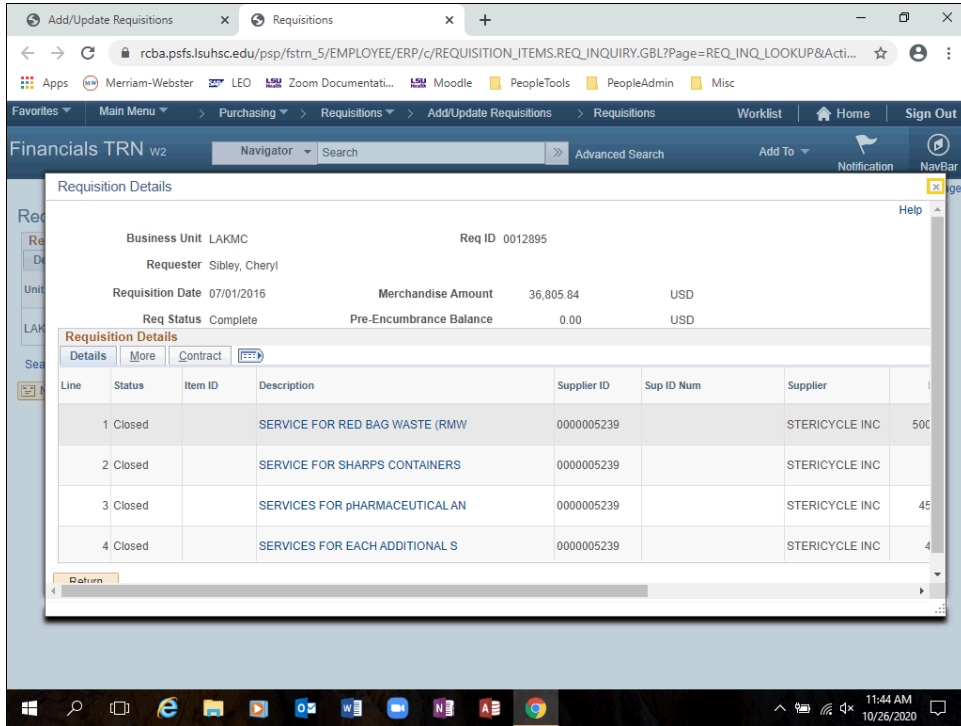
Managing Requisitions 9.2 HCSD




Step	Action
18.	Click the 0012895 link. 0012895

Training Guide

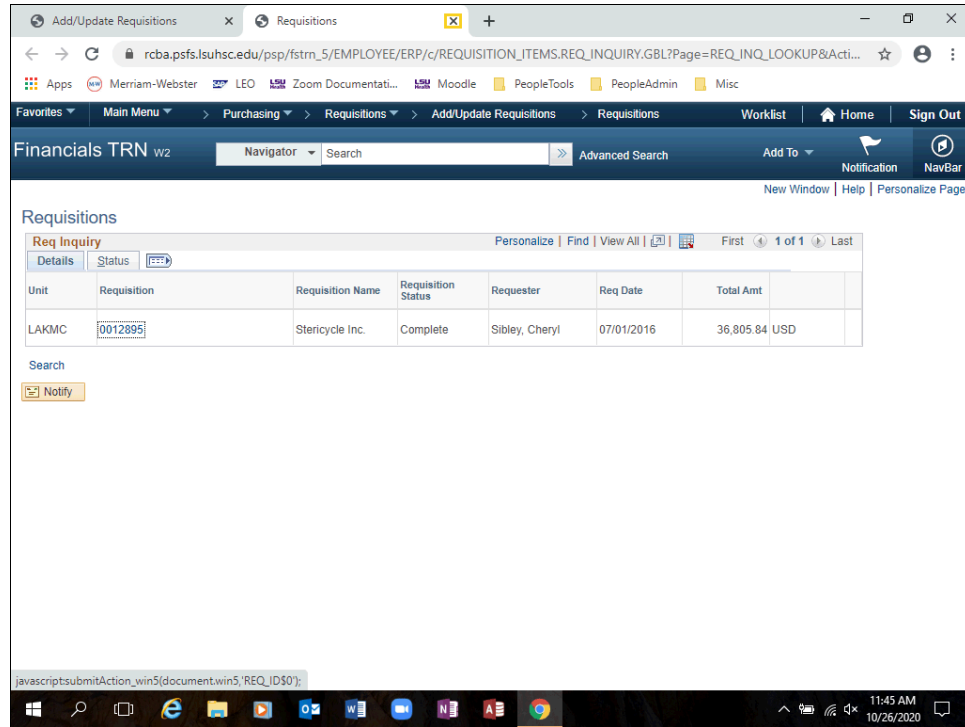
Managing Requisitions 9.2 HCSD




Step	Action
19.	Click the Close button. 

Training Guide

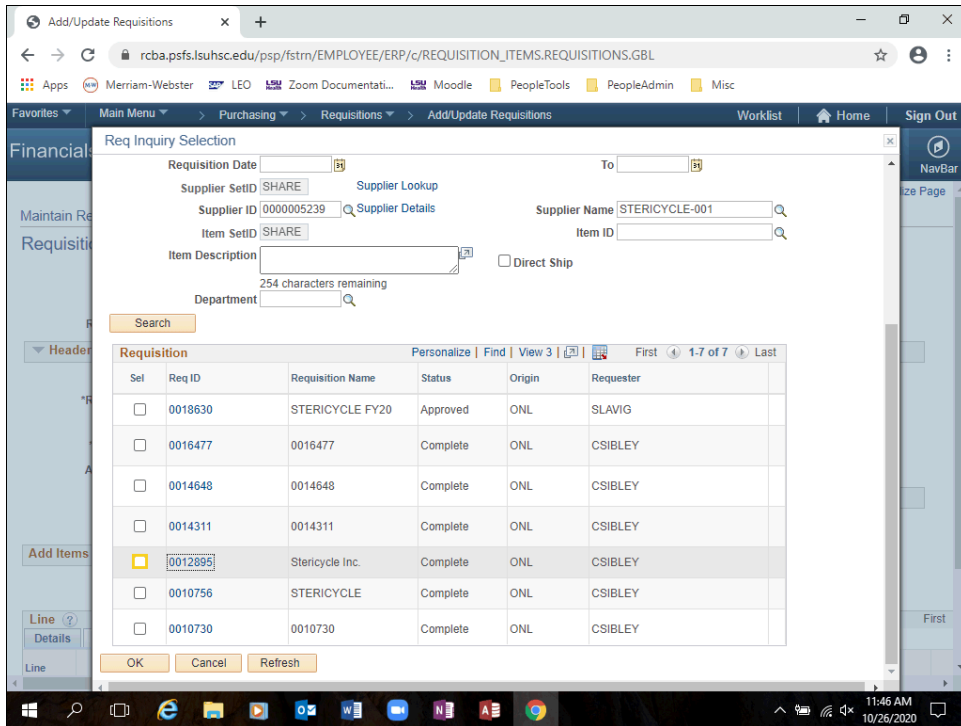
Managing Requisitions 9.2 HCSD


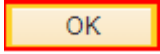


Step	Action
20.	Click the Close button. 

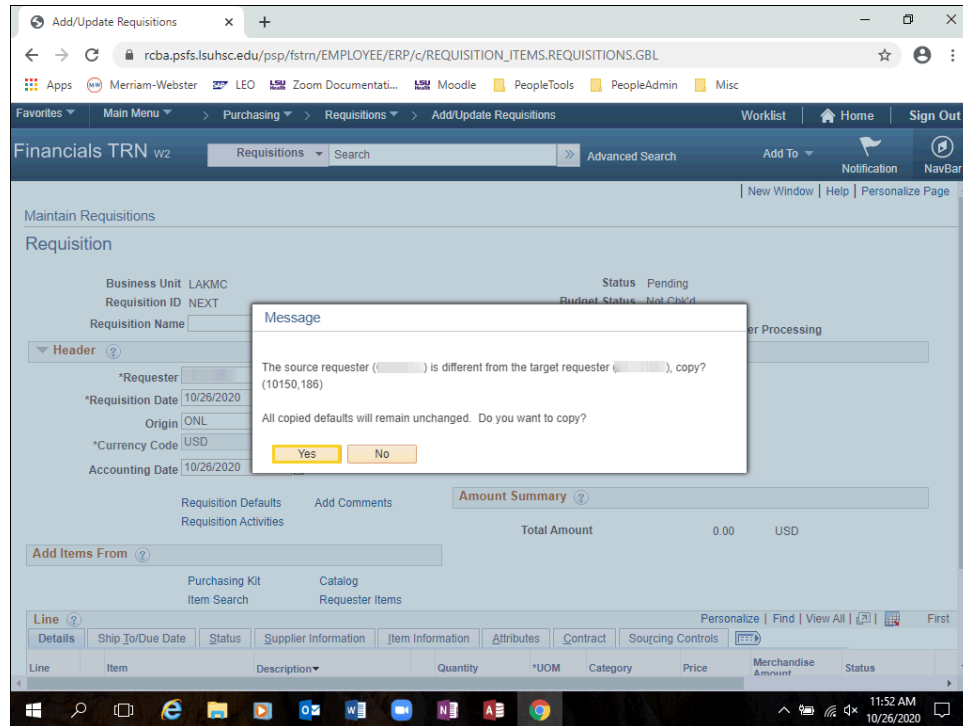
Training Guide

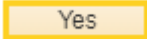

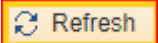
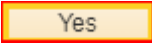


Managing Requisitions 9.2 HCSD



Step	Action
21.	<p>If the requisition is the one you wish to copy, click the Sel checkbox to select it. If it is not the correct requisition, click on the next requisition id number to view the next requisition.</p> <p>Click the Sel option.</p> 
22.	<p>Click the OK button.</p> 




Training Guide Managing Requisitions 9.2 HCSD

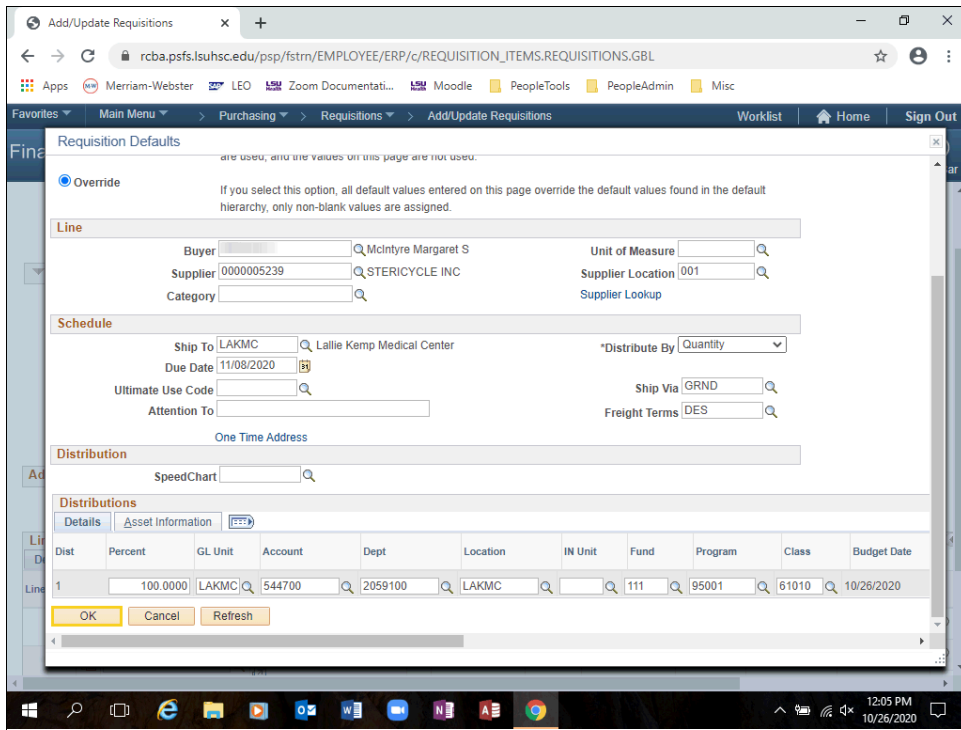


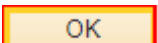
Step	Action
23.	<p>When copying a requisition from another user, you receive a message the source requester (i.e., person whose requisition you are copying) is different from the target requester (i.e., you). This message advises the defaults copied over will remain the same, and, since it is not your requisition, might need to be changed.</p> <p>Click the Yes button.</p> 
24.	<p>Enter the desired information into the Requester field. Enter "User ID".</p> 
25.	<p>Click the Refresh button.</p> 
26.	<p>Click the Yes button.</p> 
27.	<p>Click the Requisition Defaults link.</p> 
28.	<p>Enter the desired information into the Ship To field. Enter "LAKMC".</p> 

Training Guide

Managing Requisitions 9.2 HCSD

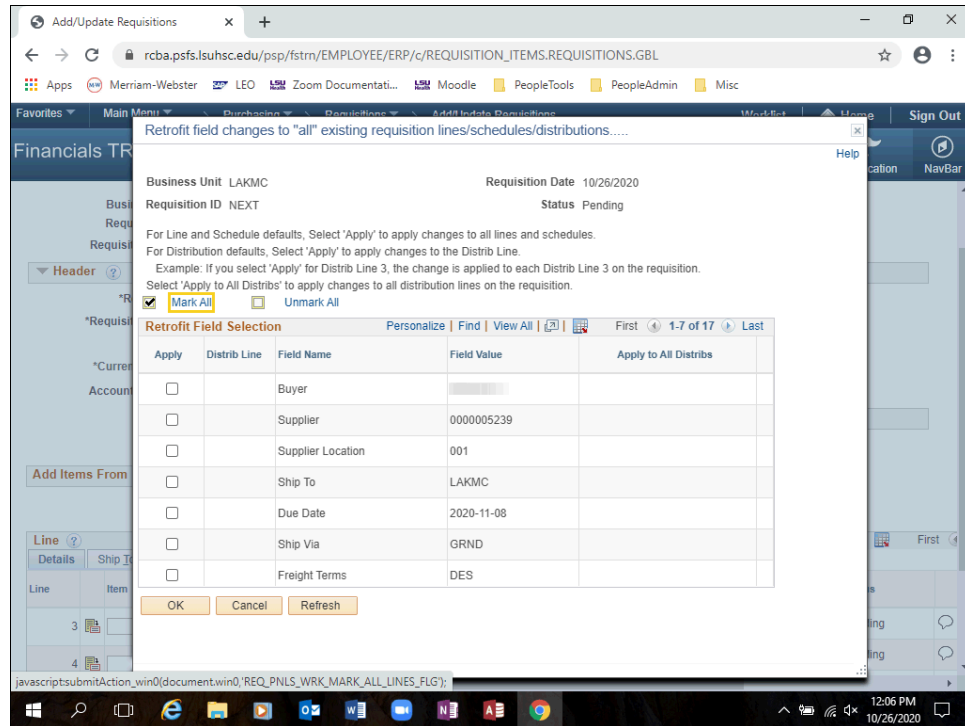
Step	Action
29.	The Due Date must be entered to save the requisition. Enter the desired information into the Due Date field. Enter " 110820 ". 
30.	Enter the desired information into the Account field. Enter " 544700 ". 
31.	Enter the desired information into the Dept field. Enter " 2059100 ". 



Step	Action
32.	Click the OK button. 

Training Guide

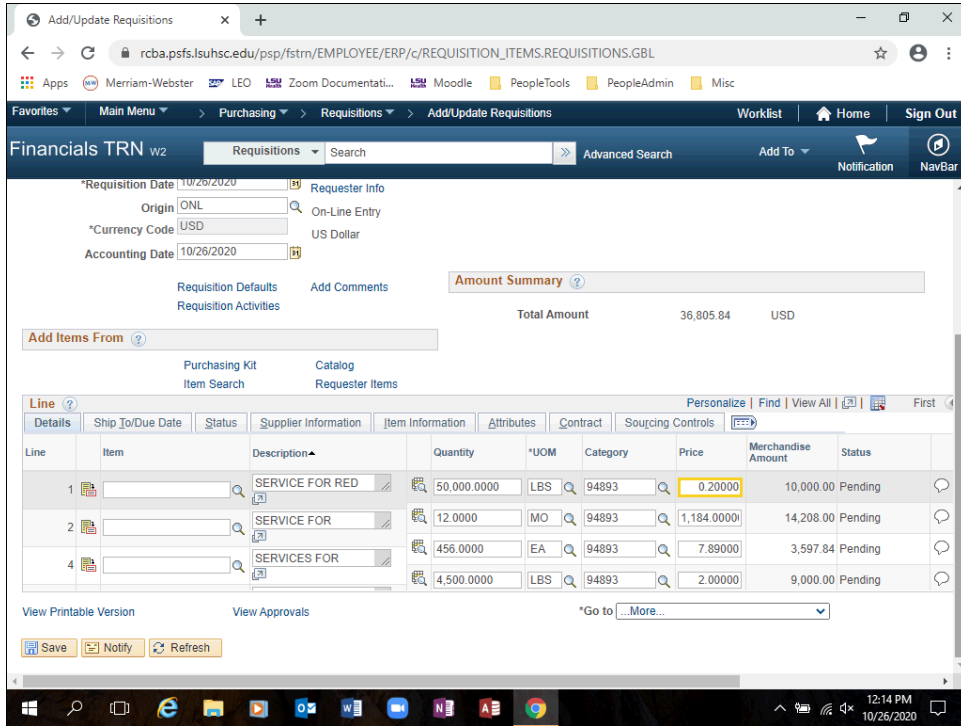
Managing Requisitions 9.2 HCSD

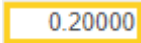
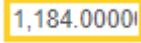
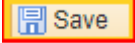


Step	Action
33.	<p>Changes were made on the <i>Requisition Defaults</i> page. You want those changes to be applied so all lines on the requisition.</p> <p>Click the Mark All link.</p> <p>Mark All</p>
34.	<p>Click the OK button.</p> <p>OK</p>

Training Guide

Managing Requisitions 9.2 HCSD



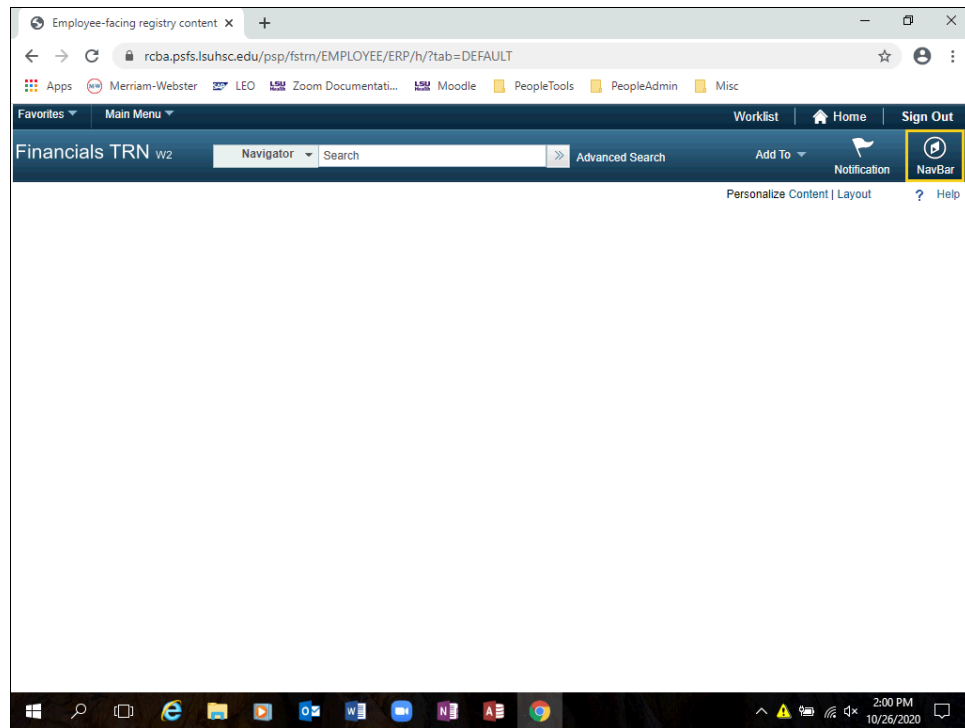
Step	Action
35.	<p>NOTE: Both the <u>Quantity</u> and <u>Price</u> fields should be reviewed and changes made as needed.</p> <p>Enter the desired information into the Price field. Enter "0.25".</p> <p></p>
36.	<p>Enter the desired information into the Price field. Enter "1189".</p> <p></p>
37.	<p>Click the Save button.</p> <p>NOTE: If no other changes are needed to be made to the requisition, you will uncheck the Hold From Further Processing box and Save the requisition to advance it in the Purchasing process.</p> <p></p>
38.	<p>This completes Copy an Existing Requisition.</p> <p>End of Procedure.</p>

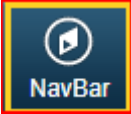
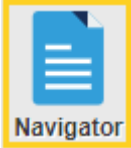

Inquire on Requisition Status

Inquire on a Requisition

Procedure


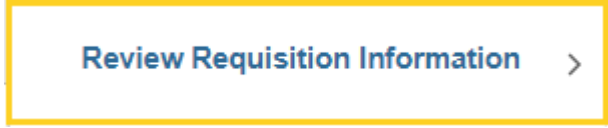

In this topic you will learn how to **Inquire on a Requisition**.

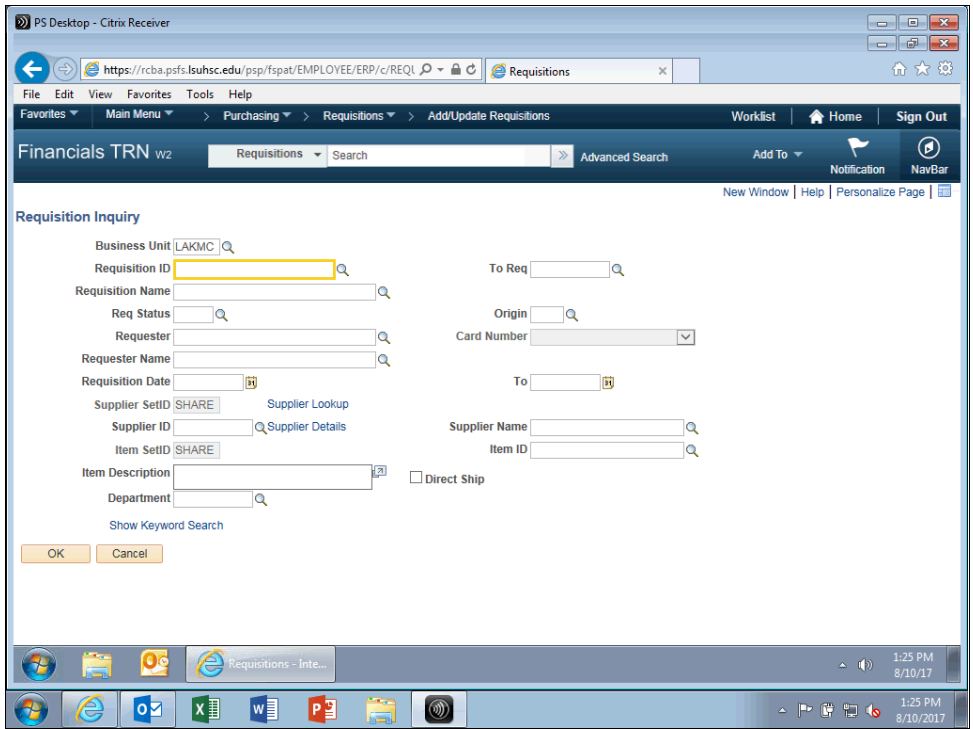



Step	Action
1.	Click the NavBar button. 
2.	Click the Navigator button. 
3.	Click the Purchasing menu. 

Training Guide

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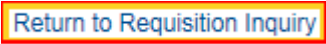
Step	Action
4.	Click the Requisitions menu. 
5.	Click the Review Requisition Information menu. 
6.	Click the Requisitions menu. 



Step	Action
7.	Enter the desired information into the Requisition ID field. Enter " 0013083 ". 

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Step	Action
8.	Click the OK button. 
9.	Click the Show all columns button. 
10.	Click the Show tabs button. 
11.	By clicking the Requisition link, you will be able to view requisitions details such as line item information. Click the Requisition - 0013083 link. 
12.	NOTE: Click the Description link for additional item description information. Click the Close button. 
13.	Click the Status tab. 
14.	Columns containing 'Y' values allow you to access inquiry pages associated with requisition such as POs and vouchers.
15.	Click the Document Status button. This will open a new window. NOTE: See the "Inquire on a Requisition Document Status" topic for detailed instructions on how to access the Req Doc Status page directly and use the document links and buttons. 
16.	NOTE: Clicking the Req ID link will display the Requisition Inquiry page. Click the Close button. 
17.	Click the Approval Status button. 
18.	Click the Return to Requisition Inquiry link. 

Training Guide

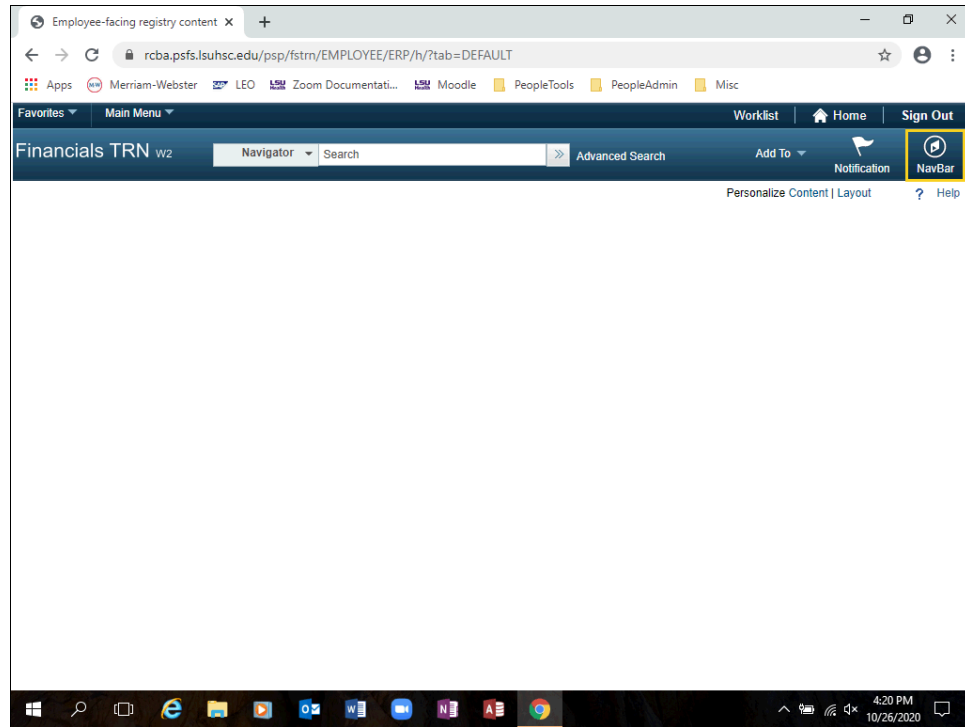
Managing Requisitions 9.2 HCSD

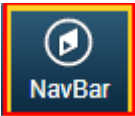
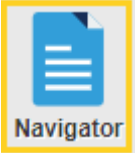

Step	Action
19.	This completes <i>Inquire on a Requisition</i> . End of Procedure.

Inquire on a Requisition Document Status

Procedure


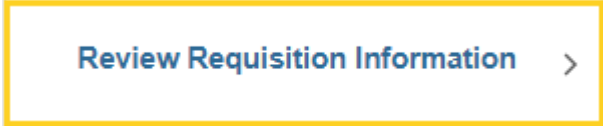
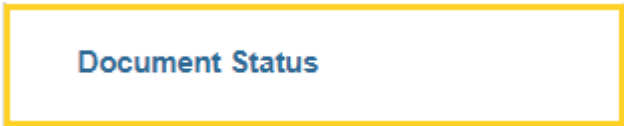
In this topic you will learn how to **Inquire on a Requisition Document Status**.

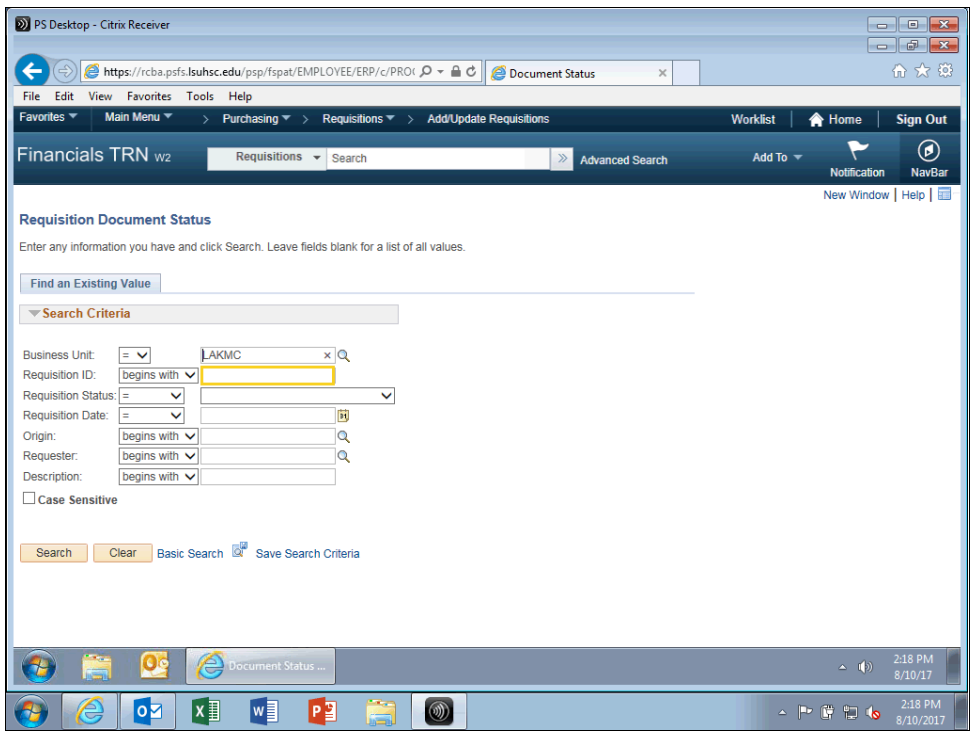



Step	Action
1.	Click the NavBar button. 
2.	Click the Navigator button. 
3.	Click the Purchasing menu. 

Training Guide

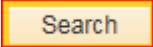


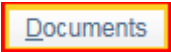


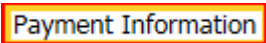
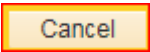
Managing Requisitions 9.2 HCSD

Step	Action
4.	Click the Requisitions menu. 
5.	Click the Review Requisition Information menu. 
6.	Click the Document Status menu. 




Step	Action
7.	Enter the desired information into the Requisition ID field. Enter " 0013083 ". 

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Step	Action
8.	<p>Click the Search button.</p> <p style="text-align: center;"></p>
9.	<p>Only the first four out of eight lines have been displayed by the system.</p> <p>Click the View All link.</p> <p style="text-align: center;"></p>
10.	<p>The Document Status page allows you to cross reference source documents associated with the requisitions throughout the purchasing process.</p> <p>The top section of the page provides information on the original requisition. Click the Req ID to view the Requisition Inquiry page.</p>
11.	<p>The Associated Documents section shows all source documents related to the original requisition. The DOC ID column provides links to the various Inquiry pages for each document type.</p>
12.	<p>Click the Related Info tab.</p> <p style="text-align: center;"></p>
13.	<p>The Related Info tab provides links to view Accounting Entries for each source document. Not all users will have the needed security access to view Accounting Entries information.</p> <p>Click the Documents tab.</p> <p style="text-align: center;"></p>
14.	<p>If you have access to view voucher and payment information, click the Voucher link to go to the Voucher Inquiry page. Click the Amounts tab to view the amount of the voucher.</p> <p>Click the Voucher DOC ID - 00115809 link.</p> <p style="text-align: center;"></p>
15.	<p>Select the Actions drop-down to view payment information from the Voucher Inquiry page.</p> <p>Click the button to the right of the Action field.</p> <p style="text-align: center;"></p>
16.	<p>Click the Payment Information list item.</p> <p style="text-align: center;"></p>
17.	<p>Click the Cancel button.</p> <p style="text-align: center;"></p>

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Step	Action
18.	Click the Close button. 
19.	This completes <i>Inquire on a Requisition Document Status</i> . End of Procedure.

Appendix

How to use the Look up Feature

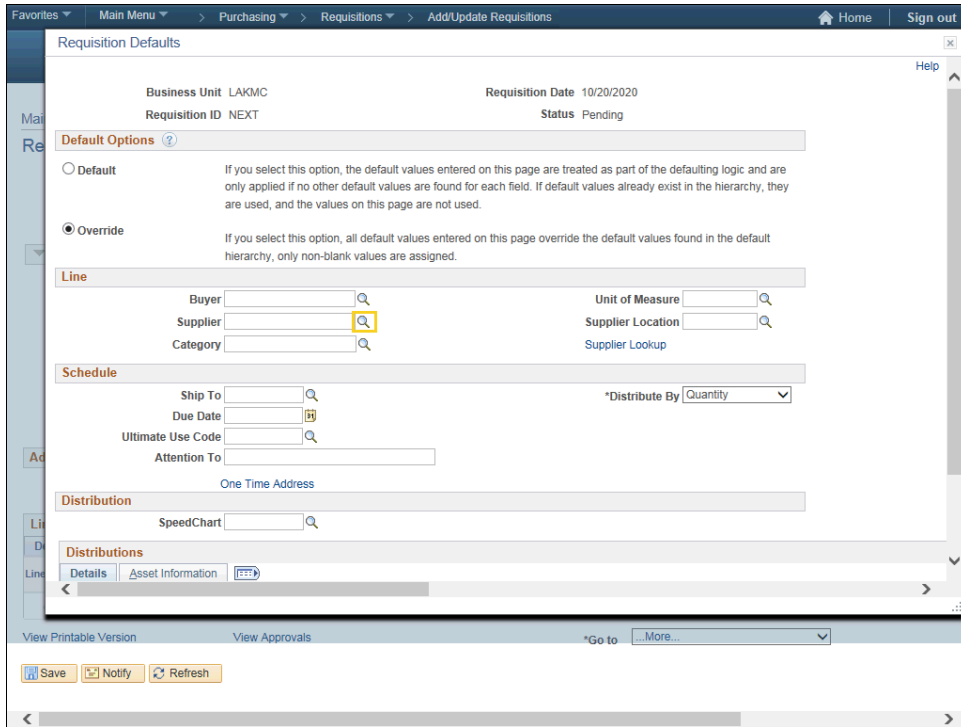
Procedure


In this topic you will learn **How to use the Look up Feature**.

Step	Action
1.	<p>The Look up feature is depicted in PeopleSoft as a magnifying glass. Anytime you see a magnifying glass next to a field, you have look up capability.</p> <p>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.</p>
2.	<p>In this exercise, 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 Staples utilizing the Look up feature. Once selected, the system will default the Supplier ID number into the Supplier field, thus completing the Look up process.</p>

Training Guide

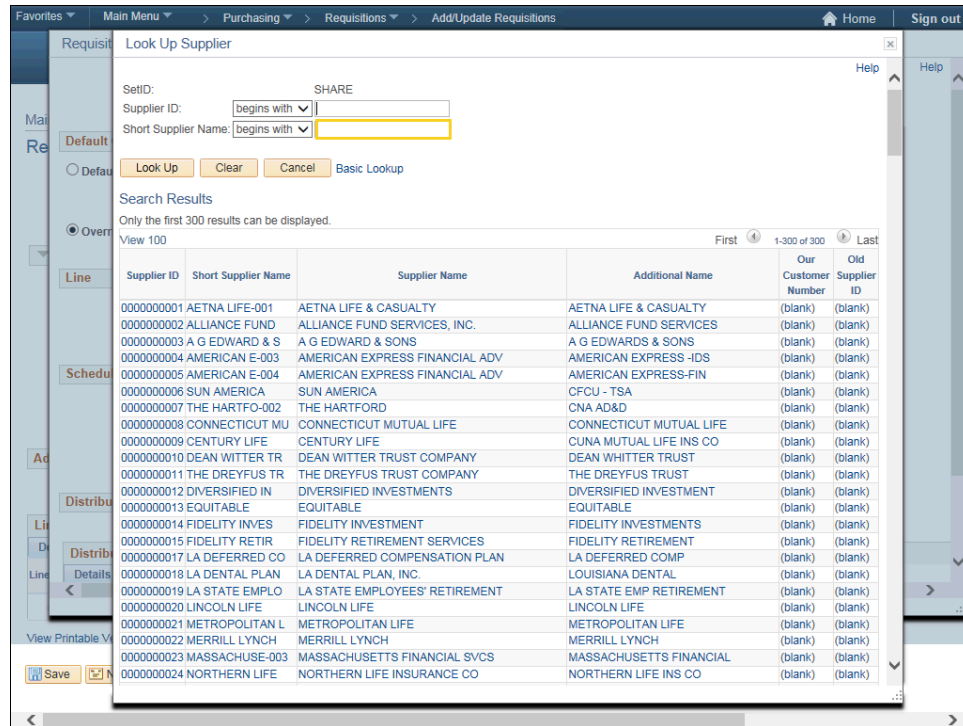
Managing Requisitions 9.2 HCSD



Step	Action
3.	Click the Supplier button. 
4.	The system will automatically display some field values on the <i>Look up Supplier</i> pagelet. Only 300 results can be displayed in the pagelet at a time. If there are more than 300 results returned, you must use the search fields provided to help narrow the scope of your search. A message will display above the returned results if more than 300 options are available. If less than 300 options are retrieved, you can view the number returned to the right side of the top line.
5.	The number of results retrieved can be reduced by entering all or part of either the Supplier ID or the Short Supplier Name into the search field provided. Most users will utilize the Short Supplier Name option as their search parameter.
6.	There are three operands, beings with, contains, and the wildcard (which is a '%' sign), that can be used to help narrow your search results. The operands will be discussed and demonstrated individually.

Training Guide

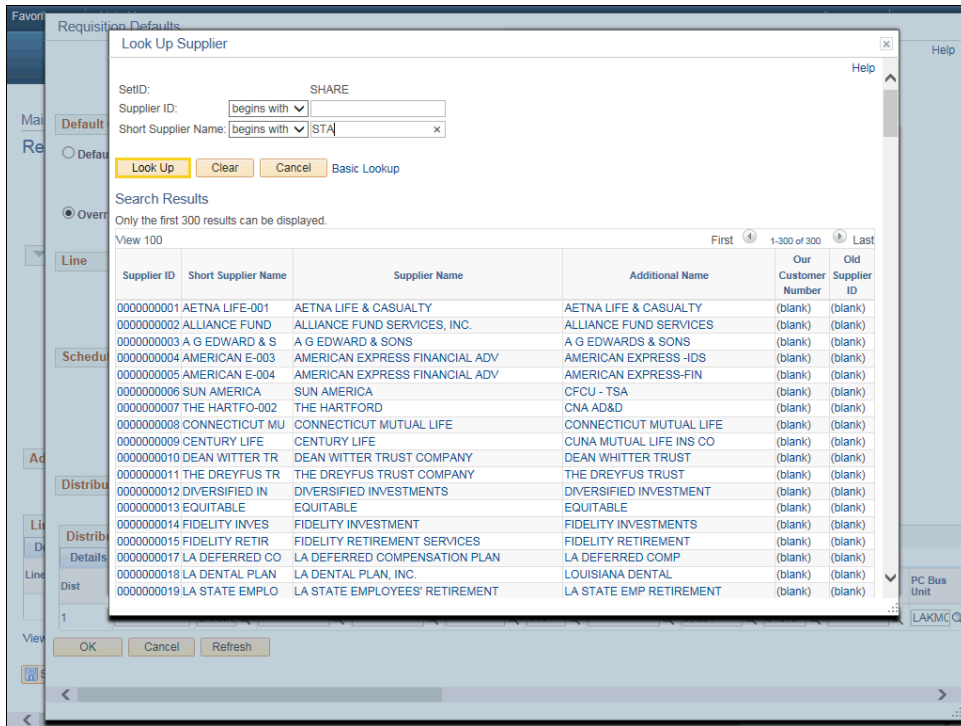
Managing Requisitions 9.2 HCSD

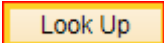
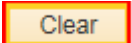



Step	Action
7.	<p>begins with</p> <p>The system defaults the 'begins with' operand for all search fields. In this example, you will search for Staples using the Short Supplier Name field and the 'begins with' operand.</p> <p>Enter the desired information into the Short Supplier Name field. Enter "STA".</p> <div style="border: 2px solid red; width: 150px; height: 20px; margin-left: 20px;"></div>

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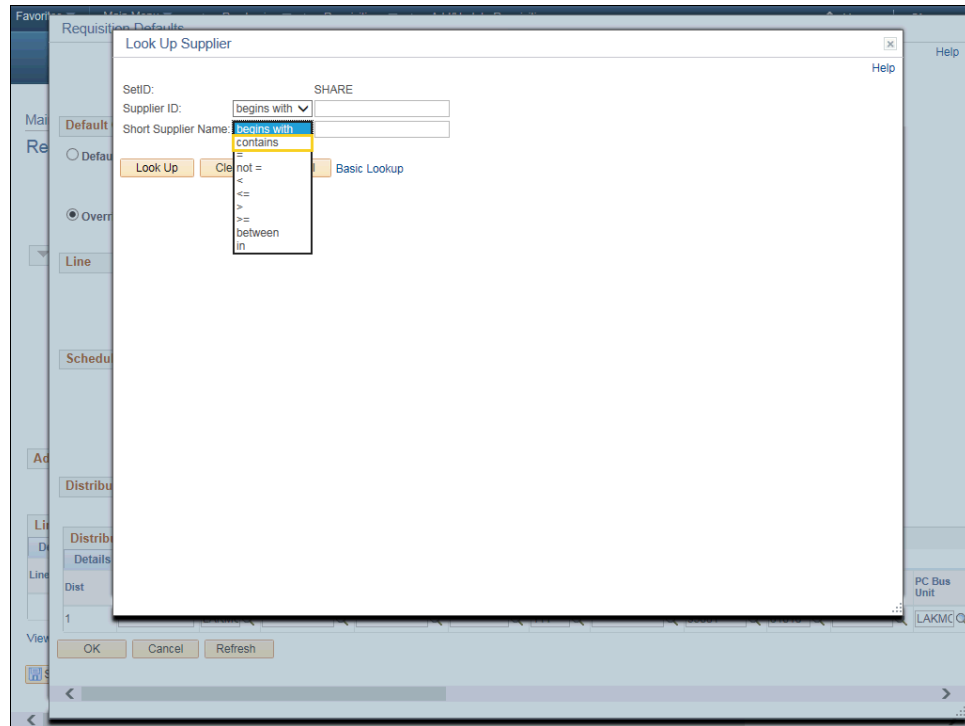
Managing Requisitions 9.2 HCSD

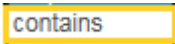


Step	Action
8.	Click the Look Up button. 
9.	The system has reduced the number of Supplier returned rows from over 300 to 162. <i>NOTE: Use the vertical scroll bar to view additional results.</i> Click the Clear button. 
10.	contains The second option is ' contains '. The 'contains' operand can be selected by clicking on the drop-down arrow to the right of the Short Supplier Name field. Click the Short Supplier Name list. 

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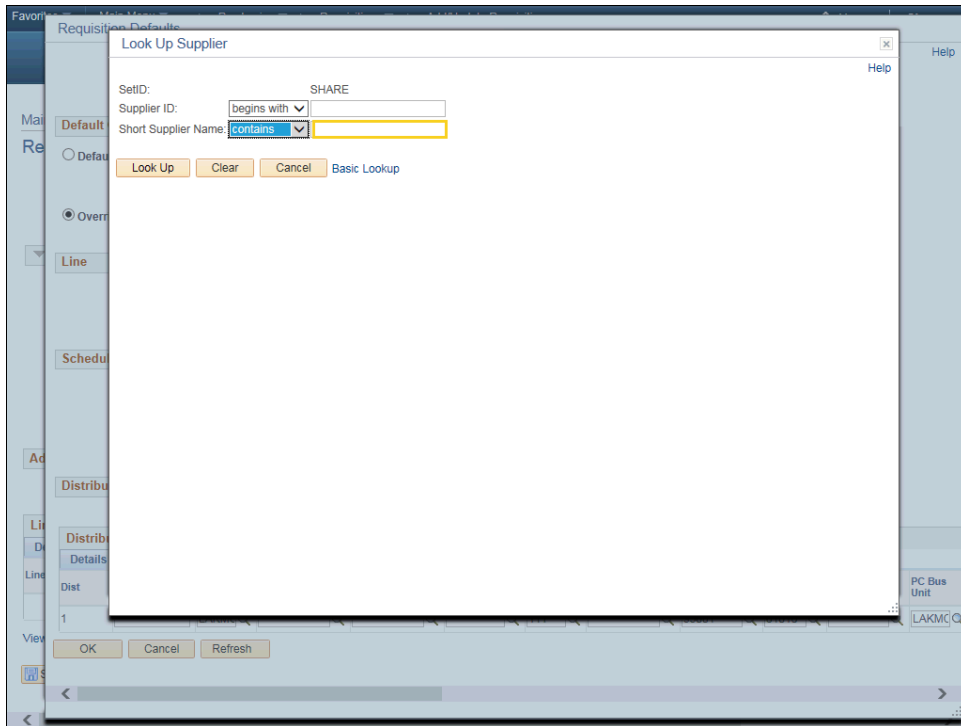
Managing Requisitions 9.2 HCSD



Step	Action
11.	Click the contains list item. 

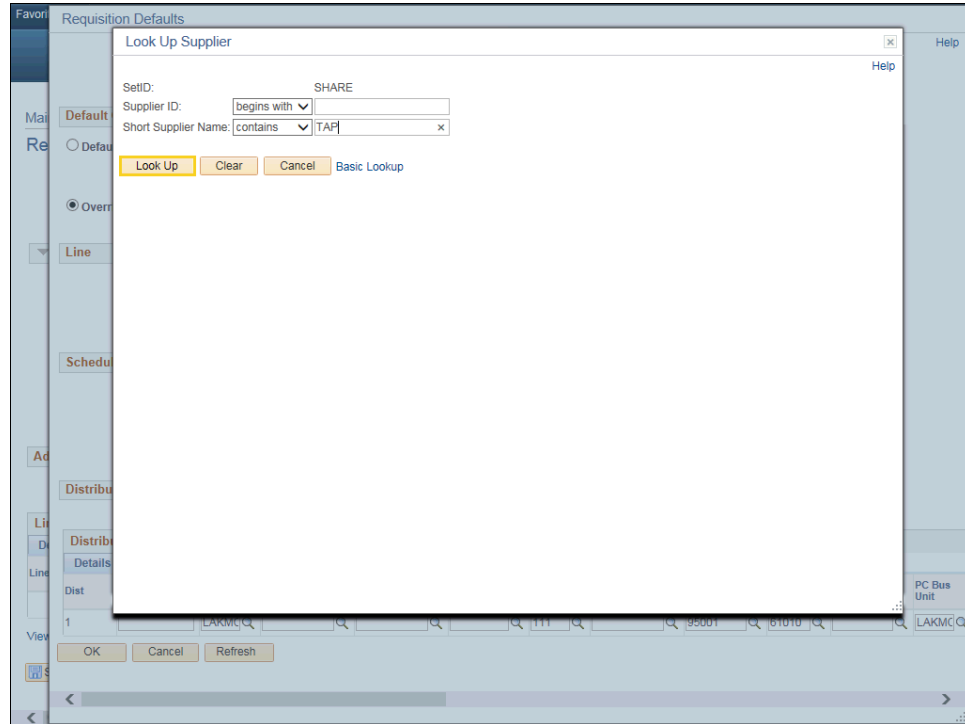
Training Guide


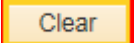

Managing Requisitions 9.2 HCSD



Step	Action
12.	Enter the desired information into the Short Supplier Name field. Enter " TAP ". <input data-bbox="347 1066 631 1104" type="text"/>



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Step	Action
13.	Click the Look Up button. 
14.	The system has reduced the number of returned Supplier results further from 162 to 21. Click the Clear button. 
15.	<p>the wildcard</p> <p>The third option is 'the wildcard'. The wildcard is a '%' sign, and takes the place of letters, number, words, etc. Where the wildcard is placed will determine the type and number of results retrieved.</p> <p>For example:</p> <ul style="list-style-type: none"> • STA% - all Supplier names beginning with STA will be returned. This option will return the same number of results as using the 'begins with' operand. • %TAP% - all Supplier names containing TAP together will be returned. This option will return the same number of results as using the 'contains' operand.
16.	Enter the desired information into the Short Supplier Name field. Enter "%TAPL" . 

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Step	Action
17.	Click the Look Up button. 
18.	<p>The system has reduced the number of returned Supplier results to three by only retrieving Supplier names which contain TAPL together.</p> <p>Each line contains a series of links for the specified Supplier. Links are generally underlined and blue in color. You can click on any link on the desired supplier's line and the system will default the needed information onto the Requisitions Defaults page.</p> <p>In this example you will select the Supplier ID link for <i>Staples Contract & Commercial</i>.</p> <p>Click the 000002106 - STAPLES CO-002 link. </p>
19.	The system defaults the 10-digit Supplier ID number into the Supplier field and the Supplier name displays to the right of the field.
20.	This completes <i>How to use the Look up Feature</i> . End of Procedure.

Create/Find a Run Control ID

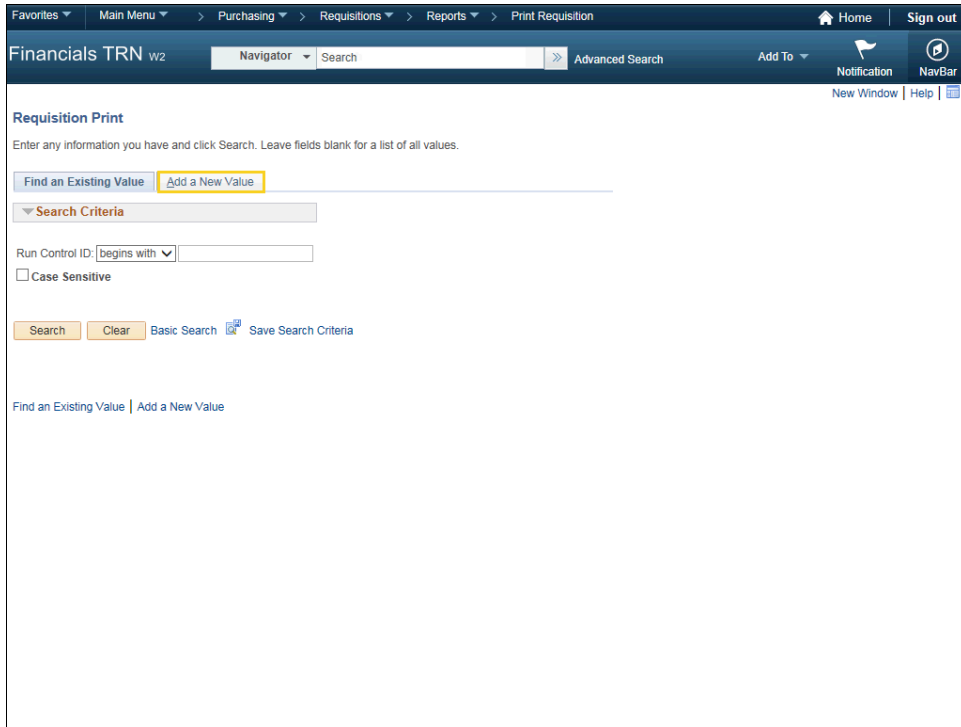
Procedure


In this topic you will learn how to [Create/Find a Run Control ID](#).

Step	Action
1.	<p>You are able to print a requisition using the View Printable Version link on the <i>Maintain Requisitions</i> page. You can also print a requisition through the <i>Process Scheduler</i>.</p> <p><i>NOTE: See the Print a Requisition using the Process Scheduler topic in the Appendix for instructions on printing a requisition using the Process Scheduler.</i></p>
2.	<p>The first time you use <i>Requisition Print</i>, you will need to create a Run Control ID in order to access the <i>Process Scheduler</i>.</p> <p>The system defaults you into the <i>Find an Existing Value</i> tab. Click the Search button to display any existing Run Control IDs. Create a new Run Control ID by clicking the <i>Add a New Value</i> tab or hyperlink.</p>

Training Guide

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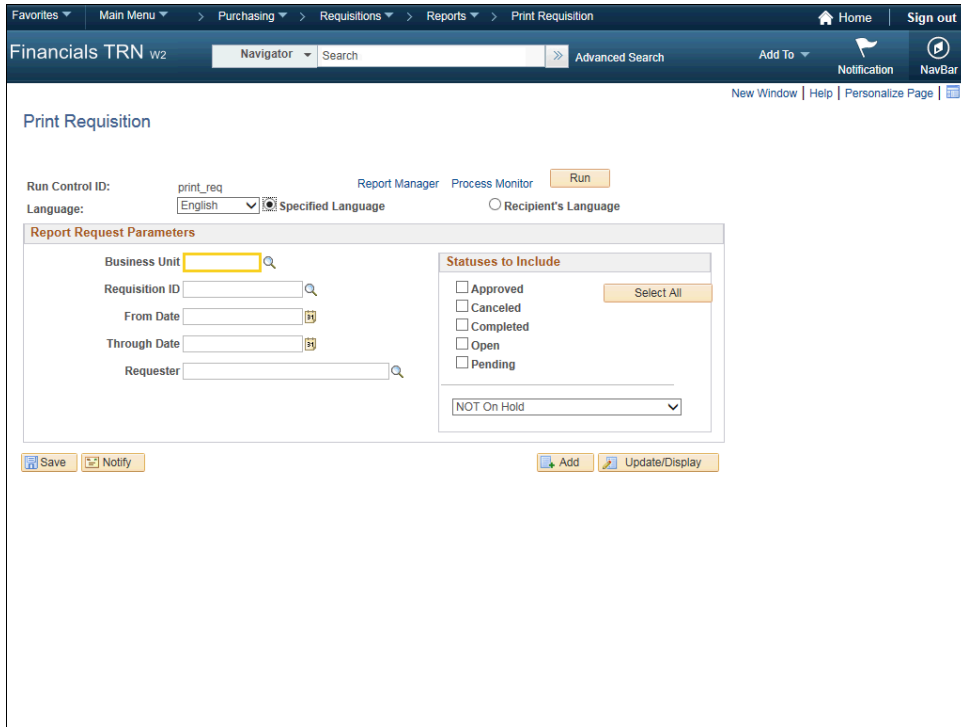
Step	Action
3.	Click the Add a New Value tab. 
4.	<p>Run Control ID</p> <p>A Run Control ID is used as a means to access the <i>Process Scheduler</i>. You may save parameters related to a particular process or report to a Run Control ID to minimize data entry when running recurring processes and/or reports.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



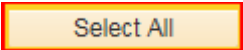
Training Guide Managing Requisitions 9.2 HCSD

Step	Action
6.	<p>Examples of Run Control IDs that do not meet requirements:</p> <ol style="list-style-type: none"> 1. print req because there is a blank space between the two words; or 2. print_requisition's because a special character (i.e., an apostrophe) is used.
7.	<p>A Run Control ID must be created to run many of the reports in PeopleSoft. If a Run Control ID is created that is unique to a specific report, it can be used to run the report specified report in the future. The advantage to this method is that all Print Requisition page parameters are saved with the run control. When running future reports, a user would only have to change the Requisition ID instead of entering all report parameters again. If you create one run control to use for all reports, then you will need to change all report parameters each time a report is run.</p>
8.	<p>Enter the desired information into the Run Control ID field. Enter "print_req".</p> <div style="border: 2px solid red; width: 250px; height: 15px; margin: 5px 0;"></div>
9.	<p>Click the Add button.</p> <div style="border: 2px solid red; padding: 2px 10px; display: inline-block; margin: 5px 0;">Add</div>
10.	<p>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. Your parameters must be saved in order for them to default in the future.</p>


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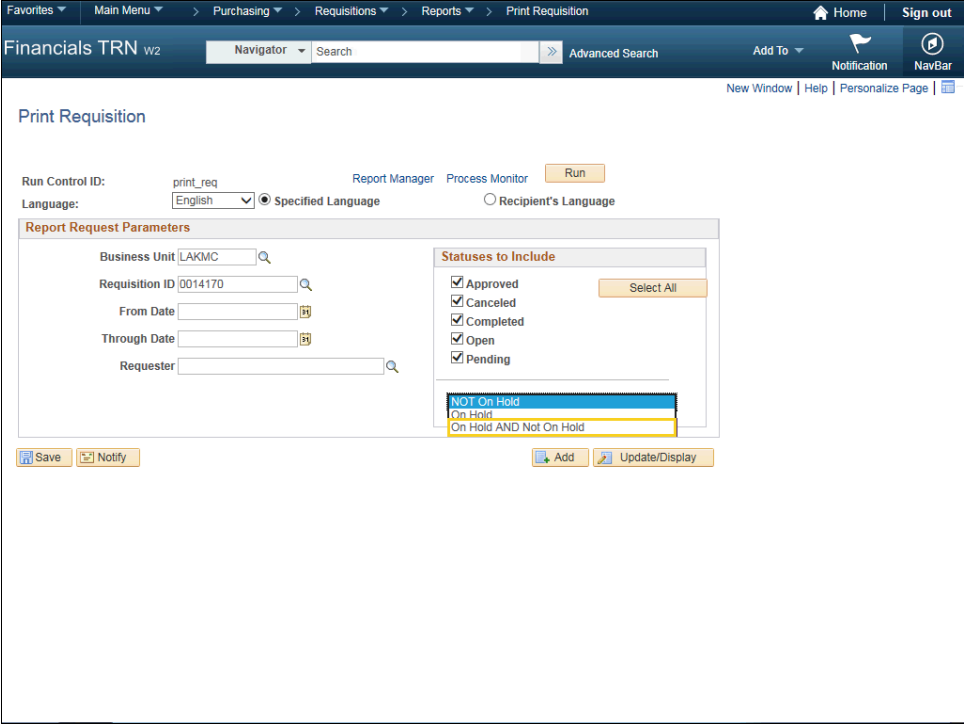
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Step	Action
11.	<p>If your Business Unit does not default, it must be entered.</p> <p>Enter the desired information into the Business Unit field. Enter "LAKMC".</p> 
12.	<p>Enter the desired information into the Requisition ID field. Enter "0014170".</p> 
13.	<p>NOTE: Do not enter From Date, Through Date, or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must be requested and printed ONE AT A TIME</u>, entering the requisition id will be sufficient to identify the requisition.</p>
14.	<p>Statuses to Include</p> <p>If you select the wrong status, it will prevent the requisition from printing (i.e., the end-user checked Pending, but the requisition was already Approved). By clicking the Select All button, you will be able to print the requisition in any status.</p> <p>Click the Select All button.</p> 

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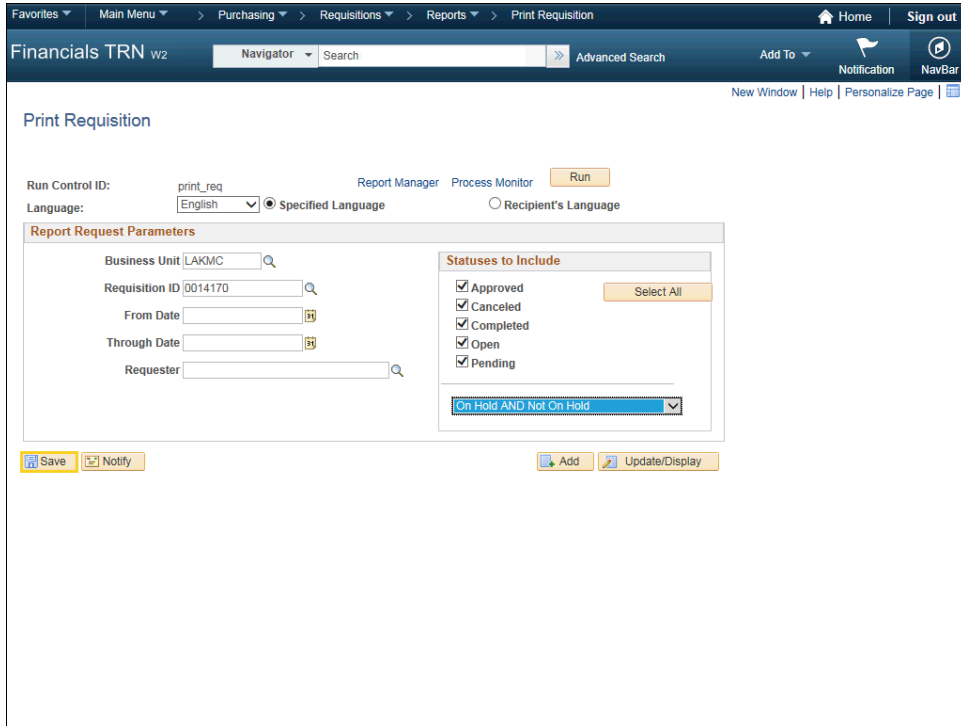
Step	Action
15.	<p>Statuses to Include (continued)</p> <p>As previously stated, if you select the wrong status it will prevent the requisition from printing. In this case, the default NOT On Hold rather than On Hold AND Not On Hold. If the requisition is on hold, meaning the Hold From Further Processing checkbox is checked on the Maintain Requisitions page, the requisition would not print using the defaulted NOT On Hold option. By selecting the ON Hold AND Not On Hold option, you will be able to print the requisition regardless of whether the Hold From Further Processing box is checked or unchecked.</p>
16.	<p>Click the button to the right of the Statuses to Include field.</p> 

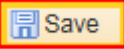



Step	Action
17.	<p>Click the On Hold AND Not On Hold list item.</p> 

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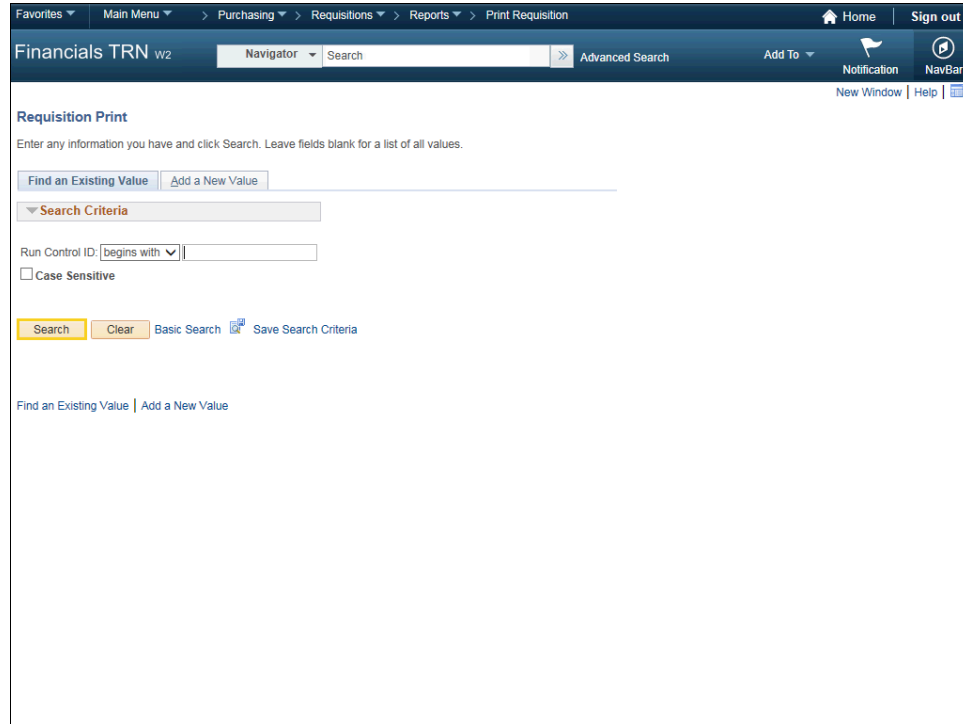
Managing Requisitions 9.2 HCSD



Step	Action
18.	<p>Click the Save button.</p> <p><i>NOTE: Parameters must be saved in order for them to default in the future.</i></p> 
19.	<p><i>NOTE: After saving your parameters, you would click the Run button to begin the print process. You must access the Report Manager to view and print you or report.</i></p> <p><i>NOTE: See the Uncheck Hold From Further Processing and Print a Requisition topic for instructions on how to print a requisition.</i></p> <p>For training purposes only, click the Print Requisition link.</p> 

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Step	Action
20.	<p>The system defaults you into the <i>Find an Existing Value</i> tab. Click the Search the button for a listing of available run controls.</p> <p>Click the Search button.</p> <p style="text-align: center;">Search</p>
21.	<p>A listing of available run controls will display. Click the desired run control and the most recent Print Requisition page for that run control will display.</p> <p>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.</p> <p>Click the print_req link.</p> <p style="text-align: center;">print_req</p>
22.	The most recent Print Requisition page displays.
23.	This completes <i>Create/Find a Run Control ID</i> . End of Procedure.

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Change a Requisition Accounting Date for the Next Fiscal Year

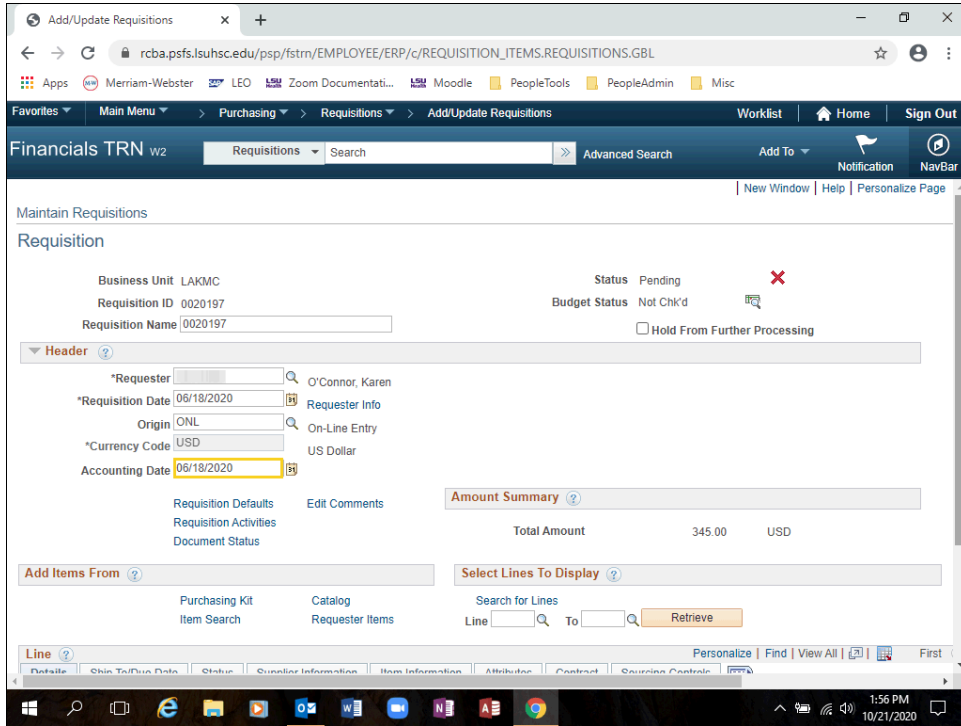
Procedure

In this topic you will learn how to **Change a Requisition Accounting Date for the Next Fiscal Year**.

Step	Action
1.	<p>When a requisition is entered for the next fiscal year, the Accounting Date <u>must</u> be changed. It is <i>not</i> necessary to change the <i>Requisition Date</i>. The <i>Accounting Date <u>must</u></i> be changed prior to entering information in the <i>Requisition Defaults</i> page to ensure that the Budget Period defaults appropriately (i.e., for the next fiscal year). If the Budget Period is not correct, an error message will display advising that the Accounting Date and Budget Period do not match when attempting to save the requisition. The Due Date on the <i>Requisition Defaults</i> page <u>must</u> also be changed.</p>
2.	<p>The dates must be changed as follows when entering a requisition for the next fiscal year:</p> <p>Accounting Date - 07/01/XX for the next fiscal year Due Date - 07/01/XX or later for the next fiscal year</p> <p><i>NOTE: It's advisable to change the accounting date <u>prior to entering any data on the requisition or copying a previous FY requisition</u> to ensure the budget period defaults to the distribution line.</i></p>

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Step	Action
3.	<p>If you receive an error when saving the requisition that indicates the Accounting Date and Budget Period do not match, use the following procedure to adjust the dates.</p> <p>Enter the desired information into the Accounting Date field. Enter "070120".</p> <p><input type="text" value="06/18/2020"/></p>
4.	<p>Click the Requisition Defaults link.</p> <p><input type="text" value="Requisition Defaults"/></p>
5.	<p>Enter the desired information into the Due Date field. Enter "071417".</p> <p><input type="text"/></p>

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Requisition Defaults

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

Line

Buyer: Unit of Measure:

Supplier: Supplier Location:

Category: Supplier Lookup

Schedule

Ship To: *Distribute By:

Due Date: Ultimate Use Code: Ship Via:

Attention To: Freight Terms:

One Time Address

Distribution

SpeedChart:

Distributions

Details | Asset Information

Dist	Percent	GL Unit	Account	Dept	Location	IN Unit	Fund	Program	Class	Budget Date
1	100.0000	<input type="text" value="LAKMC"/>	<input type="text" value="548220"/>	<input type="text" value="2068420"/>	<input type="text" value="LAKMC"/>	<input type="text"/>	<input type="text" value="111"/>	<input type="text" value="95001"/>	<input type="text" value="61010"/>	<input type="text" value="07/01/2020"/>

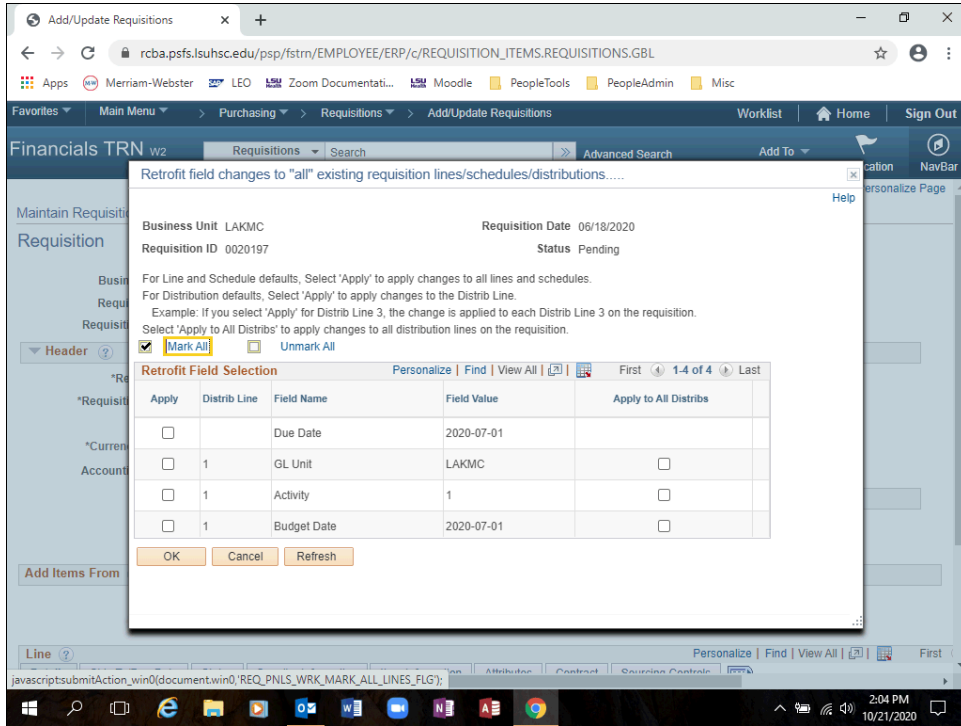
OK Cancel Refresh



Step	Action
6.	Click the OK button.

OK

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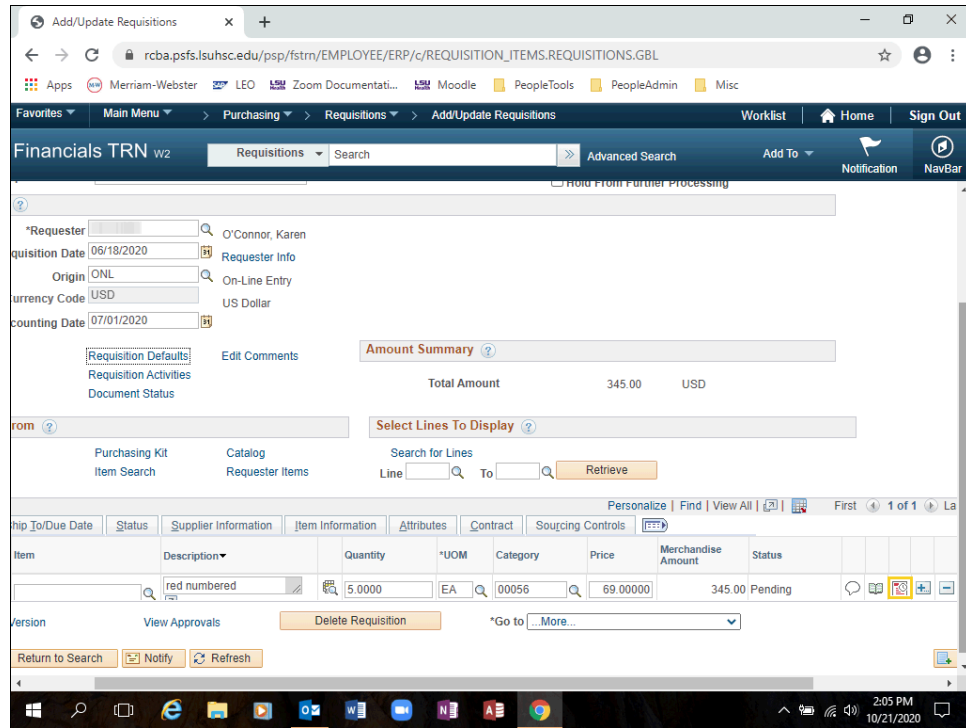
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Step	Action
7.	Click the Mark All link. 
8.	Click the OK button. 

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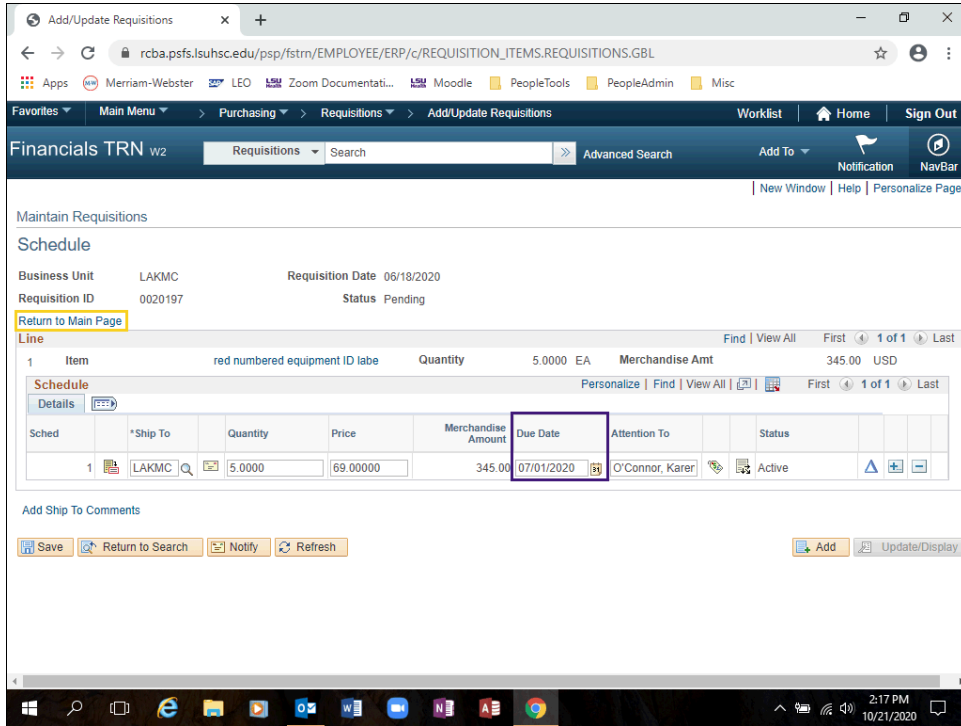
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Step	Action
9.	Click the Schedule... button. 

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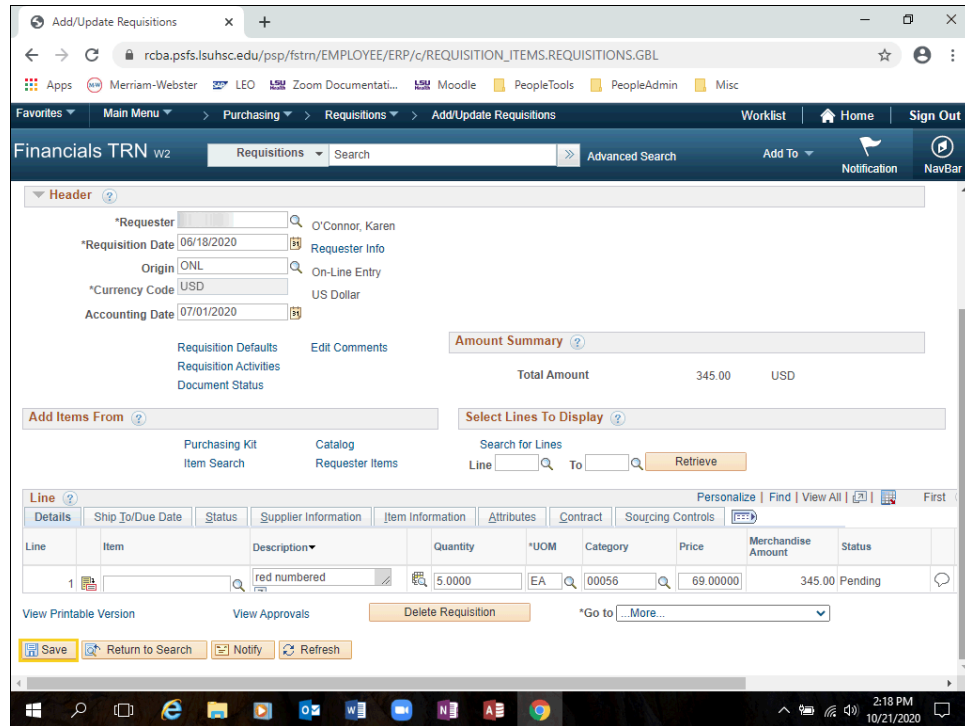
Managing Requisitions 9.2 HCSD

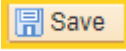


Step	Action
10.	<p>Verify the Due Date has defaulted with the 07/01/2020 date.</p> <p>Click the Return to Main Page link.</p> <p>Return to Main Page</p>

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Step	Action
11.	Click the Save button. 
12.	This completes <i>Change a Requisition Accounting Date for the Next Fiscal Year</i> . End of Procedure.