



Indiana Department of Administration
Procurement Division

PeopleSoft eProcurement

Creating Requisitions

Version 18.5-07

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Financials Procedure Overview

Purchase that does not require solicitation and no contract is required



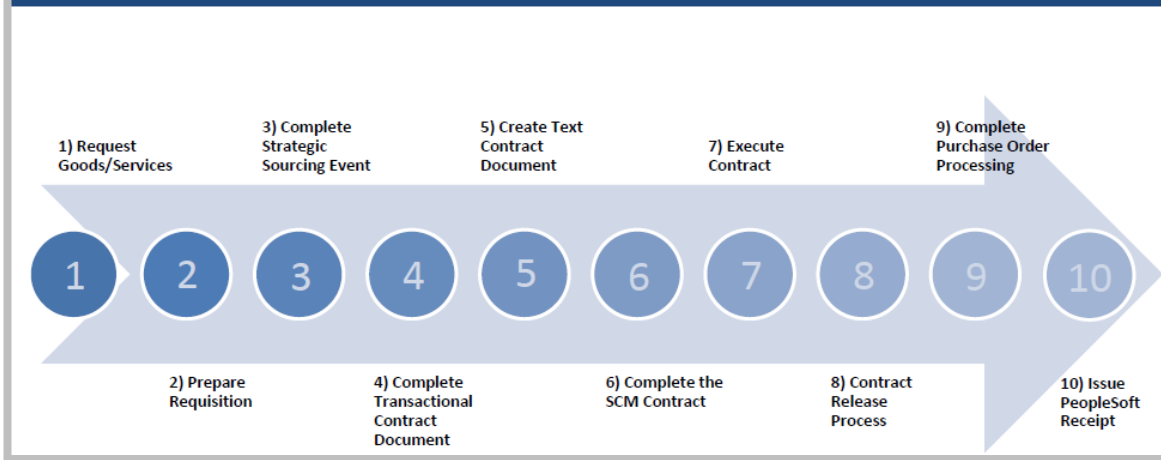
Financials Procedure Overview

Outright Purchase that requires solicitation and no contract is required



Financials Procedure Overview

Purchase that does require solicitation and an SCM contract



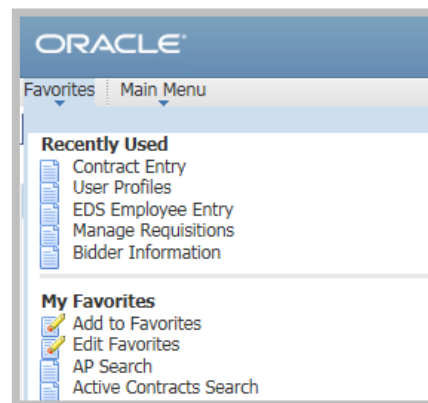
PeopleSoft Basics

Recently Used and My Favorites

Under the Favorites menu the user will find the following items which will provide one touch access to frequently or not so frequently used pages:

Recently Used will display the last five places the user visited in the application. He/she can click one of the choices to be taken directly to the page.

My Favorites will allow the user to click Add to Favorites, Edit Favorites and if he/she clicks one of the available choices underneath, he/she will be taken directly to the page.



Report an Issue

Under the Main Menu the user should click the Report an Issue link to request technical or functional support.

The user's name, email address and user id will default when logged into PeopleSoft Financials. The user should provide a phone number in case of questions, adjust the Business Unit to match the document in question, enter the Requisition ID number in the Document ID field, select eProcurement as the Module and in the Describe your problem area give a short description of what was being done prior to the unexpected result or the error occurring and what actually happened.

There is an option to attach a file containing screen shots and details of the issue which is another method to convey information to the GMS team member assigned to it.

The user must click Submit to begin the three part resolution of the issue: the user will receive an immediate email confirming the issue has been submitted, the second email typically contains the issue/ticket number assigned and the third email is typically the resolution of the issue unless the GMS team member has additional questions.

Submit a GMS Issue

Instructions
We will automatically send you a copy of the issue you submit. To copy additional people on this issue, a valid email address must be entered below. Please separate multiple email addresses with a semicolon (;).

Your Name or Company Name: Werner, Jeania-061
Your eMail address: JWerner@idoc.IN.gov
Your User ID or Bidder ID: J005563

CC: _____
Subject: GMS Issue
Date Requested: 04/09/2018 Monday
Importance: Medium
Date Required: 04/11/2018 Wednesday
Phone: _____ Ext: _____

Business Unit: 00061 Administration
Voucher ID, Journal ID, PO ID, Req ID, etc.
Document ID: _____
Application: FINANCIALS Module: _____

*Describe your problem

attach file containing screen shots and details of the issue:

Submit

My System Profile

Under the Main Menu the user will find the My System Profile link which when clicked will allow the user to adjust general profile information.

If email notifications and/or worklist access is desired, the user must select the Email User and/or Worklist User checkboxes under Workflow Attributes.

The user must verify that the correct email address is listed on the Primary Email Account line to receive system generated emails. This is not automatically updated with your current State email address.

Workflow Attributes

Email User Worklist User

Miscellaneous User Links

Email

Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	_____

IM Information

Protocol	XMPP Domain	UserID	Password
XMPP	_____	_____	_____

Save

Application Announcements

This area is used by the GMIS team to post notices of month end, year-end closing, town hall meetings, system upgrades, etc. The user can adjust the settings in this area.



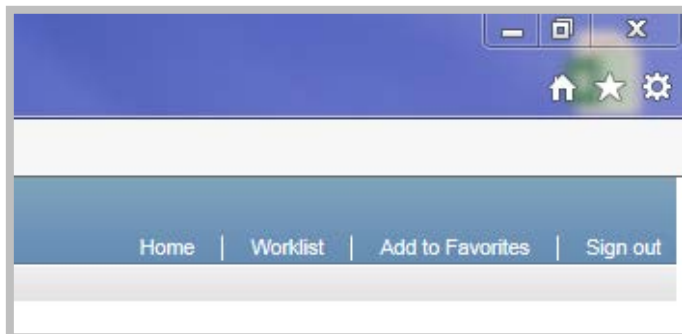
Home, Worklist, Add to Favorites and Sign Out

If the user clicks the Home link, then he/she will be returned to the first screen displayed after log in.

If the user clicks the Worklist link, then he/she will be able to access items that require his/her action if that option is selected under My System Profile.

If the user clicks the Add to Favorites link from a desired page, he/she will be able to rename the page if desired and upon saving it will show up in the list of Favorites.

The user should click the Sign Out link when finished with the application. If the user clicks red X to close the window, then he/she will be using system resources for another 20 minutes until PeopleSoft times the user out.



Creating a Requisition

The user must not rely on the name of a field or an assumption as to how it might be used to complete it. The technical and business process requires that very specific information is entered in a specific manner and place. Any data field not discussed specifically should remain blank or as it appears by default. Failure to follow the requirements as presented may result in errors. This is especially true on the Line Defaults section on the Define Requisition page and the vendor and manufacturer information when entering a Special Request item.

Menu Navigation:

- eProcurement
- Create Requisition

Define Requisition

The basic accounting information to be used on the Requisition is documented in this area. The user will notice the current step being accessed is highlighted in yellow. If using a catalog punch-out, it is best for the user to go straight to the Add Items and Services tab, then to the Define Requisition tab and finally to the Review and Submit tab.

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

1 Specify requisition name, requester, and other information that applies to the entire requisition.

2 Business Unit: 00061 Administration

*Requester: J005563 Werner, Jeania-061

3 Requisition Name: Priority: Medium

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: Vendor Location: Buyer: Category: Unit of Measure:

Requisition Summary
There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

1. Business Unit

The user will have a default value populated here. It can be edited if the user has been given access to multiple business units and needs to reference a different one.

2. Requester

This field allows the user to document the person who asked for the goods or services. The user will have a default value populated here. It can be edited if the user needs to reference a different one.

3. Requisition Name (not a required entry)

This field allows the user to assign a name to the Requisition. If one is not entered, PeopleSoft will duplicate the Requisition ID number as the name upon saving.

The screenshot shows a software interface with two main sections. The top section, 'Shipping Defaults', contains three input fields: 'Ship To' (with a magnifying glass icon), 'Due Date' (with a calendar icon), and 'Attention:'. A link 'Modify Onetime Address' is positioned to the right of the 'Ship To' field. The bottom section, 'Accounting Defaults', features a table with the following columns: Location, GL Unit, Fund, Account, Program, Dept, Bud Ref, PC Bus Unit, and Project. The first row of data contains the values: 061PROC, 00061, [blank], [blank], 10000, 039000, 2017, [blank], and [blank]. A 'Continue' button is located at the bottom left of the interface.

4. Ship To

The user should verify/enter the Ship To ID or click the magnifying glass (Look Up) icon next to the field to select the appropriate delivery location. The user can enter the three digit agency number and click Look Up to be given a listing of all of the agency locations.

5. Due Date (not required entry)

The user should enter the expected due date in MM/DD/YYYY format or use the calendar page icon to the right of the field to select the date. If one is not identified, PeopleSoft will default the date as one month from the entry date upon saving.

6. Accounting Defaults (Chartfields)

The user must enter/edit Chartfield values as required by the agency. This includes but is not limited to: Location, GL (General Ledger) Unit, Fund, Account, Program, Dept (Department), and Bud Ref (Budget Reference). Only one chartfield string can be entered on this page.

Once items 1 through 6 have been entered/verified the user should click Continue or the Add Items/Services tab and determine the appropriate path to add the items/services based on what is needed:

Option 1: Add Items and Services from the Catalog tab (QPAs with line item information)

Option 2: Add Items and Services from the Web tab (QPAs with a Punch-out catalog)

Option 3: Add Items and Services from the Special Request tab (QPAs without line item information or tied to a punch-out catalog, items and services from the PEN Products website not tied to a QPA, items and services from the Ability Indiana website not tied to a QPA, or for items/services that must have a solicitation done, an award made and/or a contract issued).

Add Items and Services

Option 1 - from the Catalog tab

The user should select this tab if searching for items/services from a line item QPA.

The Select a catalog dropdown will default to All Items UNSPSC; the user should not adjust this selection. This will allow PeopleSoft to search for any item located in the State of Indiana item catalog.

The screenshot displays the Oracle eProcurement 'Create Requisition' interface. The main navigation bar includes '1. Define Requisition', '2. Add Items and Services' (highlighted), and '3. Review and Submit'. Below the navigation, there is a search bar and a 'Browse Catalog' section. The 'Browse Catalog' section shows a dropdown menu for 'Select a catalog' set to 'All Items UNSPSC'. To the right of this dropdown is a list of instructions: 'Choose from available catalogs in the dropdown list', 'Navigate categories by clicking folders', 'View items in a category by clicking the category name', and 'Use the checkboxes to select categories to search below'. Below the 'Browse Catalog' section is the 'Search Catalog' section, which includes a search criteria dropdown set to 'All' and a list of search fields: Description, Manufacturer, Manufacturer's Item ID, Vendor, Vendor Item ID, Item ID, Model, and UPN ID. There are also input fields for 'Price Range' (From and To) and a currency dropdown set to 'USD'. At the bottom of the search criteria section, there are 'Search Options' checkboxes for 'Match Case', 'Exact Word', and 'Sounds Like'. On the right side of the page, there is a 'Requisition Summary' sidebar with the text: 'There are no lines on this request. Please add new lines in order to save this requisition.' and a table showing 'Total Lines: 0' and 'Total Amount (USD): 0'. The browser address bar shows 'https://s.gms.in.gov:8080/EMPLOYEE/ERP/c/PV_MAIN_MENU' and the page title is 'Create Requisition'.

The user will need to search for the item(s) to add to the Requisition. The following are the recommended search criteria:

Description

The user should enter a basic description of the item to be purchased. For the best results the user should enter keywords; place an asterisk before and after each descriptive word (like *paper*). To search by more than one descriptive word users should include the word "and" between each descriptive word (for example paper and towel). This search would return all items that contain the words paper and towel.

The user should not pick any catalog items that have a description that begins with INDOT if he/she does not work for that agency.

Manufacturer

The user can enter the manufacturer of the item if known. This method is not recommended for all items as the catalog does not always contain this information.

Manufacturer's Item ID

The user can enter the manufacturer's item number if known. This method is not recommended for all items as the catalog does not always contain this information.

Vendor

The user can enter the name of the vendor to search for all items in the catalog tied to the vendor.

Vendor Item ID

The user can enter the vendor's item number if known. This method is not recommended for all items as the catalog does not always contain this information.

Item ID

This is the PeopleSoft item number assigned by IDOA Procurement. This is generally an 18 digit number (can use the wildcard key * to take the place of the leading zeroes). This will only pull up the item and vendors assigned to the item. All of the current QPAs can be found at <http://www.in.gov/idoa/2450.htm> . When the user opens a specific line item QPA, the item ID will be listed in front of the description. **This is the best search mechanism.**

After entering the search criteria the user should click either Search button to allow PeopleSoft to return all of the items that meet the criteria. If there are multiple vendors for one catalog item, then when the item is returned the user should click on the Item Description link and it will return all the vendors. The user should click Add for the appropriate vendor and it will pull the item into the Requisition. The user will need to navigate to the Review and Submit page to adjust the quantity as needed.

There are two places information for each item is displayed that will help the user determine the correct item(s) needed:

If the user clicks the **Details** tab, it will display the Item Description (the user can click the link to retrieve a longer description and additional item information), Vendor, Manufacturer, Price and UOM. It also allows the user to adjust the quantity (defaults as 1.0000) of an item/service and click Add to the right of the quantity to add it to the Requisition.

Item Detail								Personalize	Find	View All
Details		Item IDs								
	Item Description	Vendor	Manufacturer	Price	UOM	Quantity				
<input type="checkbox"/>	2 oz. Cups SOUFFLE, 2500/case	ACORN DISTRIBUTORS INC		28.07000 USD	Case	1.0000				Add
<input type="checkbox"/>	2 oz. Cups lids SOUFFLE, 2500/case	ACORN DISTRIBUTORS INC		29.53000 USD	Case	1.0000				Add
<input type="checkbox"/>	3-Section Plate 9" FOAM WHITE, 500/case	ACORN DISTRIBUTORS INC		20.90000 USD	Case	1.0000				Add
<input type="checkbox"/>	4 oz. Cups.SOUFFLE, 2500/case	ACORN DISTRIBUTORS INC		48.91000 USD	Case	1.0000				Add

If the user clicks the **Item IDs** tab, it will display the Item Description, Item ID, Vendor Item ID, Manufacturer ID and Mfg Item ID.

78 Results			
Sort Items:		*Show Items from:	
Item Description		All Vendors	First 1 - 2
Item Detail			
Details		Item IDs	
Item Description	Item ID	Vendor Item ID	Manufacturer ID
<input type="checkbox"/> 2 oz. Cups SOUFFLE, 2500/case	000000000100209322		
<input type="checkbox"/> 2 oz. Cups lids SOUFFLE, 2500/case	000000000100209321		
<input type="checkbox"/> 3-Section Plate 9" FOAM WHITE, 500/case	000000000100209328		
<input type="checkbox"/> 4 oz. Cups.SOUFFLE, 2500/case	000000000100209324		

The user can either review the details on both tabs or click on the Show All Columns icon (to the right of the Item IDs tab) to display all of the information one on page.

The user must repeat the process to add the items or services to the Requisition until all items have been added. The recommendation is to create a Requisition from only one QPA at a time.

After the user has added all items to the Requisition he/she needs to click on the Review and Submit link at the bottom of the item search page or click the Review and Submit tab at the top. The user should then proceed to the Review and Submit section.

Add Items and Services

Option 2 - from the Web tab

The user should select this tab to display the available QPA punch-out catalogs. The user must click the blue link of the vendor's name to access the corresponding catalog.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

? Help

Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog | Favorites | Templates | Forms | **Web** | Special Request

Logo	Merchant	Description
	Staples	Office Supplies, Inkjet Cartridges, and Toner
	NAPA	
	Hewlett Packard	IT Hardware
	Ricoh, USA	Multifunctions, Scanners & Faxes
	Fastenal	
	Graybar	
	Staples Facility	MRO – Paper/Janitorial Products and Dispensers
	Kimball Office	

[Review and Submit](#)

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

There are specific instructions for the several of the punch-outs on the IDOA Procurement website at <http://www.in.gov/idoa/2931.htm>

The user should keep in mind that while on the vendor's web site he/she still has the 20 minute time frame to return to PeopleSoft before being timed out.

Once the user has found all items and has checked out of the vendor's punch-out web site, he/she will be returned to PeopleSoft where he/she will need to click on the Review and Submit link at the bottom of the page or click the Review and Submit tab at the top. The user will then proceed to the Review and Submit section.

Add Items and Services

Option 3 - from the Special Request tab

The user should select this tab if entering QPA items not associated with an item number or a punch-out catalog, for items available from the PEN Products or Ability Indiana catalogs that are not tied to a current QPA and for items/services that must have a solicitation done, an award made and/or a contract issued.

The user will need to select the Special Item link as the Request Type; this option is used for both goods and services.

The screenshot shows the Oracle 'Create Requisition' interface. At the top, there are navigation links: Home, Worklist, Add to Favorites, and Sign out. Below the Oracle logo, there is a breadcrumb trail: Favorites | Main Menu > eProcurement > Create Requisition. The main heading is 'Create Requisition'. A progress bar shows three steps: 1. Define Requisition, 2. Add Items and Services (highlighted in yellow), and 3. Review and Submit. Below the progress bar, there is a search bar and a 'Search' button. A tabbed menu includes Catalog, Favorites, Templates, Forms, Web, and Special Request (selected). A 'Select a Request Type' section lists four options: Special Item (Request an item that is not listed in the Catalog), Fixed Cost Service (Request a one-time service for a flat fee), Variable Cost Service (Request a service for which the fee is based on the time worked), and Time and Materials (Request a service for which the fee is based on the time worked and materials used). A 'Review and Submit' link is at the bottom left. On the right, a 'Requisition Summary' box states: 'There are no lines on this request. Please add new line in order to save this requisition.' Below this, it shows 'Total Lines: 0' and 'Total Amount (USD): 0'.

The user will need to complete the required entries (they are marked with an *) about the item/service being purchased.

This screenshot shows the 'Special Item' form within the Oracle 'Create Requisition' interface. The progress bar remains the same. The 'Special Request' tab is active. The 'Special Item' form contains several fields: *Item Description, *Price (0.00000), *Quantity, *Category, Vendor ID, Vendor Name, Vendor Item ID, Mfg ID, Manufacturer, and Mfg Item ID. Fields marked with an asterisk (*) are required. There are also fields for *Currency (USD), *Unit of Measure, and Due Date. A 'Suggest New Vendor' link is present. Below the form, there is an 'Additional Information' text area and a 'Request New Item' checkbox. At the bottom, there are checkboxes for 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher', along with 'Add Item', 'Cancel', and 'Add or Start New Type' buttons. The 'Requisition Summary' box on the right remains the same.

1. Item Description

The user should enter a brief, unique description of the item/service being requested. If there is additional information/specifications to be provided to the vendor, they can be placed in the Additional Information field.

2. Price

The user should enter a good faith estimate of price for the item or service being requested. This can come from the QPA vendor (item/service not available from a punch-out or catalog), from the PEN Products or Ability Indiana website, or research done.

3. Quantity

The user should enter the quantity for each item or service being requested. If the agency intends to make the resulting Purchase Order Amount Only, then enter a quantity of one with an appropriate unit of measure. The user should see the Setting up Amount Only line(s) for services section for more information.

4. Unit of Measure

The user should enter the unit of measure (UOM) specific to the item or service being requested. The user can click the magnifying glass to the right of the field and search/resort the values in the list displayed to select an appropriate unit of measure. The user should be mindful that the UOM will display on the resulting Request for Quotation (RFQ) form to solicit bids and/or the Purchase Order form being sent to the awarded vendor.

If entering a Requisition for services, the user must consider how receiving will be performed and payment will be made against the resulting Purchase Order. If a receipt/payment needs to be made by dollar amount and not a set price per unit of measure, the user should set up the line with a quantity of one, an appropriate unit of measure (service, each, lot, annual, etc.) and the corresponding price (example: 1 year for \$12,000). If the unit cost will remain the same for each payment, the user could instead enter the appropriate quantity with the appropriate unit of measure price (example: 12 months at \$1,000 for a total of \$12,000).

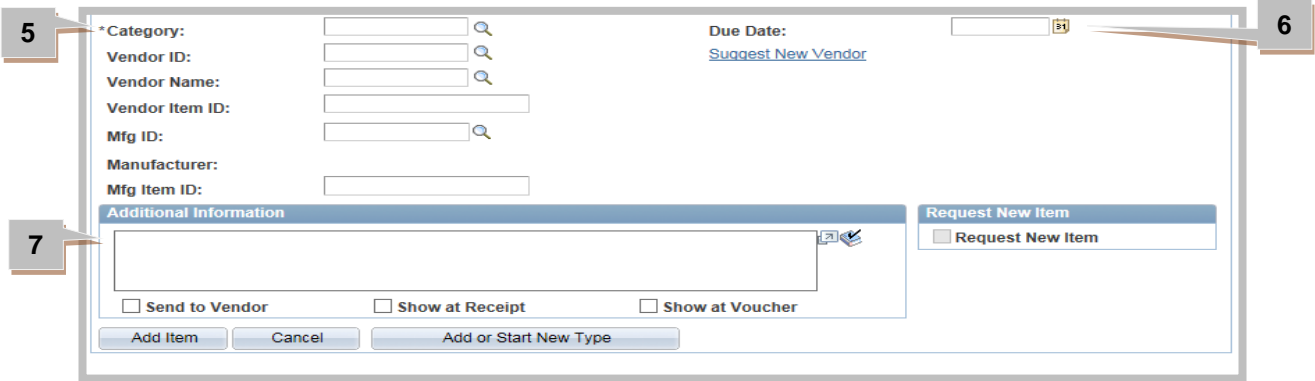
Multiple Fiscal Year Contracts:

If a Contract for Services is a commitment for multiple years, for example a four year contract, IDOA recommends the user enter a separate Requisition line for each fiscal year (for ease of issuing receipts and making corresponding payments). In order to enter budget lines for multiple fiscal years, the user must submit a request to the agency Controller/Budget Analyst requesting that a \$0 budget be opened for each of the future fiscal years needed. Once the \$0 Budgets are established and posted, the user will select the appropriate accounting information including the budget reference and budget date for each Requisition line. The user will receive a budget check error on the zero dollar budget years that the agency Budget Analyst will be required to override. The user will need to re-budget check the Requisition until it becomes Valid. Since the Office of Management and Budget (OMB) is requesting that all commitments be put

into PeopleSoft, this should not be a problem. It is IDOA's recommendation that users set up the lines as amount only as it will make receiving against the Purchase Order much easier. If the agency is using the paper based method to route contracts for signature, once the Requisition is approved and has a valid budget check, print, sign and submit it along with the contract and any other required documentation to IDOA. After the contract is fully executed it will be returned to the agency to issue the Purchase Order (PO). If the agency is using Supplier Contracts Management (SCM) to process contracts, then after a contract is executed use the Contract Release process or the Expedite Requisitions process to issue a PO. If the amount is above the agency's delegation, then the PeopleSoft Buyer must submit a GMIS issue identifying the Business Unit, PO number and related EDS/Contract ID number and IDOA Procurement will approve it. The PeopleSoft Buyer may then finalize, budget check and dispatch the PO and send a copy to the vendor. If the PO fails the budget check, then the agency's Budget Analyst will need to override it. The future years' budgets will encumber in the negative to show the future year commitments. When the future year budgets are loaded, then the PO lines will synchronize and will automatically be encumbered appropriately.

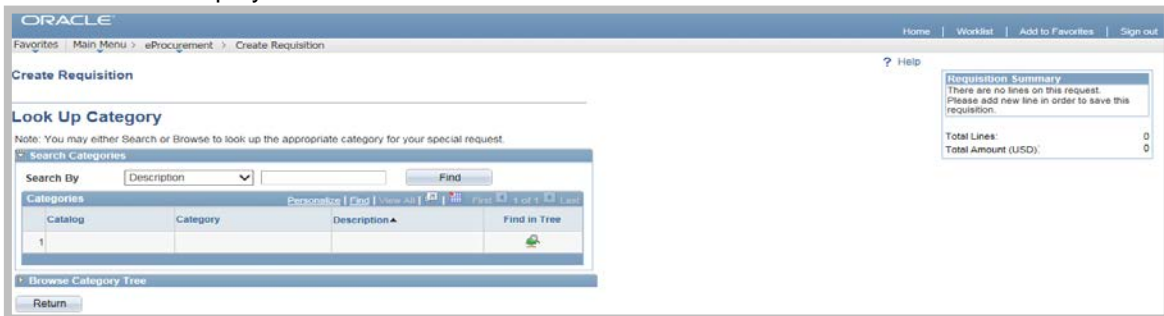
Multiple year contracts which contain projects - a directive from State Board of Accounts

- Prior to entering the Requisition/PO, the project administrator should create projects for the future years covered by the contract, regardless of the type of contract (service, lease, etc.).
- If the future year's project name is uncertain, create 'dummy' projects; only Project ID and one Activity ID need to be set up.
- Set 'dummy' project Status to E-Reject-ACT/GLE/BUD/REV/PAY to avoid any accidental charges to this project.
- Create the PO, using multiple lines for future years, utilizing 'dummy' projects.
- When the future year is to be activated, modify 'dummy' project to the correct project, setting status to active.



5. Category

The user should enter the eight digit category if known; this is also known as the United Nations Standard Products and Services Code (UNSPSC). If it is not known, the user should click the magnifying glass to the right of the field to search; the following screen will be displayed.



The user should enter a brief description in the field to the right of Description and click Find. The user should click on the most appropriate choice based on the item/service being purchased. It may be helpful to sort the description column (click on the column name) in alphabetical order. The Search By option can be changed to Category to search that way if desired. The user can find a document titled Understanding and Searching UNSPSC posted at <http://www.in.gov/idoa/2931.htm> for more information. The user can also visit www.unspsc.org to view the entire description if truncated or to search outside of PeopleSoft.

The UNSPSC category chosen drives the account number defaulted on the line, whether or not the item is automatically set up as an Asset (see the Asset Information section) and the approval routing on the Requisition.

6. Due Date

The user should enter the date the items/services are to be delivered if it did not come forward from the Define Requisition page. The user can either enter the date in the format of MM/DD/YYYY or select the date by clicking on the date page icon to the right of the field.

7. Additional Information

The user can enter any additional description, specifications or other information in the Additional Information field. He/she must be sure to click the Send to Vendor checkbox if the information should print on the Requisition, Request for Quote form and/or the resulting Purchase Order form.

Additional Information

Dimensions (L x W x H) 9730 x 2496 x 3453
11-20 ton capacity
Engine: 8:L

Send to Vendor Show at Receipt Show at Voucher

Add Item Cancel Add or Start New Type

On the Review and Submit tab, the additional information field will populate the add/edit comments bubble on the far right of the line.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	2018 New 8 x 4 Manual Diesel D		1.0000	Each	60,000.00000	60,000.000

Select All / Deselect All

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

When the user clicks on the bubble, it will open up the line comments field as shown below.

Create Requisition

Line Comments

Line	Description	Quantity	Unit	Price
1	2018 New 8 x 4 Manua	1.0000	Each	USD

<< Dimensions (L x W x H) (mm) 9730x2496x3453
11-20 ton capacity
Engine: 8L >>

Send to Vendor Show at Receipt Show at Voucher

Add Attachment

OK Cancel

The user can make changes/additions to the line comments by typing the information in the field; when finished he/she should click OK. The new information entered will stay only with the line comments – it will not update the additional information field on the item description.

If the user clicks on the blue item description link, then it will return to the special request item originally entered. If the user wants the additional information field and the line comments to be the same, then he/she will need to update the additional information field and click OK. This will replace everything in the line comments bubble on the Requisition line.

The user should return to the Review and Submit tab to verify the comments bubble on the line.

The user should keep in mind that the information last saved/shown in the Requisition line comments will be what is displayed on the Requisition.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Special Item

*Item Description: 2018 New 8 x 4 Manual Diesel Dump Truck

*Price: 60000 *Currency: USD

*Quantity: 1 *Unit of Measure: ea

*Category: 25101601 Due Date:

Vendor ID: [Suggest New Vendor](#)

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

Additional Information

Dimensions (L x W x H) (mm) 9730x2496x3453
 11-20 ton capacity
 Engine: 8L

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

NOTE: The user must not enter vendor or manufacturer information at this time. The vendor will be selected at the Purchase Order creation step.

Once the user has completed all the required entries for the item or service, he/she should click either Add Item or Add and Start New Type to add the item to the Requisition. If only one item is needed, he/she should click Add Item. If more items are needed, he/she should click Add and Start New Type and complete the previous steps for each item to be added to the Requisition.

The description on each line of a Requisition must be unique. If using a Strategic Sourcing Event to issue a solicitation, then duplicate Requisition lines will be collapsed onto one line.

After the user has added all items to the Requisition he/she must click on the Review and Submit tab at the top. The user should then proceed to the Review and Submit section.

Review and Submit

The user is able to review/edit information and complete several tasks including final submission to the approval workflow from this page.

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 00061 Administration Priority: Medium

Requester: J005563 Werner, Jeania-061

Requisition Name: Special 4

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	2018 Snow Removal Services		1.0000	Year	15,000.00000	15,000.00

Pre-Encumbrance Balance: 15000.00 USD

*Requisition Type: Procurement Service Contracts

Comments: Snow removal services for the Governor's mansion

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

Check Budget Pre-Check Budget Budget Checking Status: Valid

Save & submit Save & preview approvals Cancel Changes Find more items

1. Adding/Editing Line Comments on the Requisition Line(s)

The user should click on the Comments icon at the end of the Requisition line to open the Line Comments page.

Line Comments

Line	Description	Quantity	Unit	Price
1	6x12 utility trailer	1.0000	Each	USD

Comments: 2019 model year

Send to Vendor Show at Receipt Show at Voucher

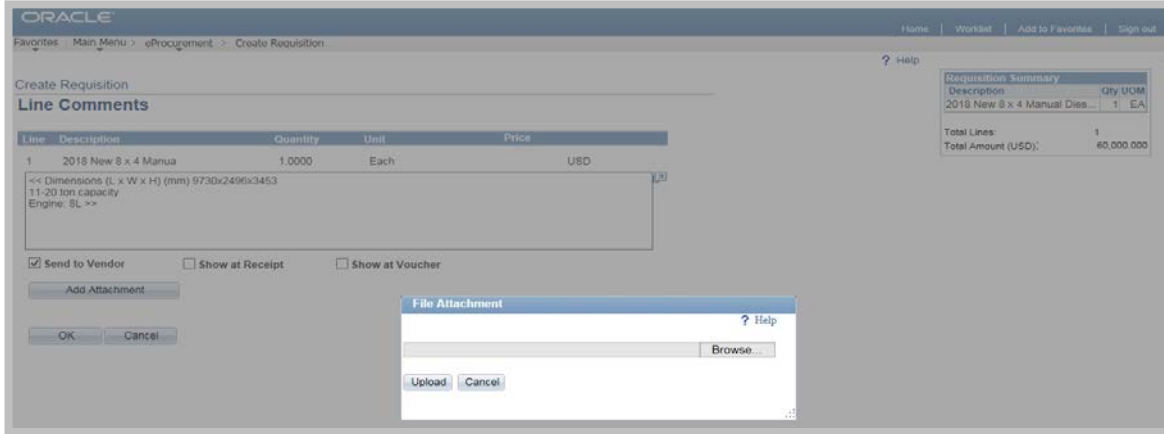
Add Attachment

OK Cancel

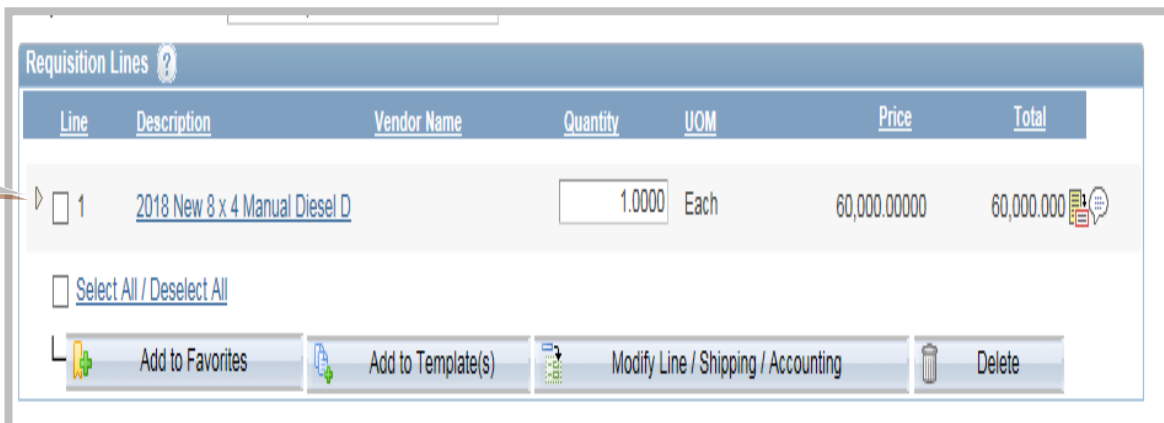
The user can edit or add the desired information in the field or use the Display comment text in modal window icon to enlarge the field. If the comment needs to be printed on the Requisition, RFQ form and/or Purchase Order, the user should select the **Send to Vendor** checkbox. If no attachments need to be added, the user should click OK to return to the Review and Submit page to repeat the same process on all of the lines as needed.

Adding attachments

The user must click Add Attachment to access the page shown below. The user must click Browse to search for the file, highlight the document name and click open; this will transfer the document to the browse line. Once the file is listed, the user will need to click Upload to add the attachment to the Requisition.



Once the file has uploaded the user will be returned to the Line Comments page where he/she can click View to review the document. If the incorrect document was attached, the user must click the minus button at the end of the row and start the process over. If the user is done and does not want the attachment sent to the vendor or added to the RFQ form and/or Purchase Order, he/she should not click the Send to Vendor checkbox for the attachment. If the user is done with adding attachments and line comments, he/she should click OK to be taken back to the Review and Submit page.



2. Verifying/updating information on the Requisition Line(s)

The user can click on the Description link to review or update the information as needed. If updates are made, he/she should click OK to return to the Review and Submit page to continue processing.

The following information should be verified **line by line** through opening the line details (triangle to the left of the line). When the user is finished reviewing/making any adjustments to the information it can be collapsed by clicking the triangle again.

Chartfield Information

The user should review/edit the information the Chartfields1 tab under the Accounting Lines banner as shown below.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	2018 New 8 x 4 Manual Diesel D		1.0000	Each	60,000.00000	60,000.000

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: [] Quantity: 1.0000 Price: 60,000.00000
Status: Active *Ship To: [] [Modify Onetime Address](#)
Attention To: Werner, Jeania-061
*Distribute By: Qty SpeedChart: []

Accounting Lines

Personalize | Find | View All | First | 1 of 1 | Last

Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		061PROC	1.0000	100.0000	60,000.000	00061

The user should click the Chartfields2 tab to review/edit the remainder of the chartfield information.

The user can add more/multiple distribution lines by clicking the + icon at the end of the row where he/she will be asked how many lines to add. When the lines are returned, they will automatically default with the chartfields used on the Define Requisition page. The user will need to update fields as required (perhaps the budget date, department or project information) for each line added.

Asset Information

The user should click the Asset Information tab under Accounting Lines as shown below.

The screenshot displays the 'Requisition Lines' interface. At the top, a table lists requisition lines with columns for Line, Description, Vendor Name, Quantity, UOM, Price, and Total. Line 1 is selected, showing a description of '2018 New 8 x 4 Manual Diesel D', a quantity of 1.0000, and a price of 60,000.00000. Below the table, there are checkboxes for 'Consolidate with other Reqs' and 'Override Suggested Vendor'. A 'Shipping Line' section includes fields for 'Shipping Line: 1', 'Due Date', 'Quantity: 1.0000', and 'Price: 60,000.00000'. There are also fields for 'Status: Active', '*Ship To:', and 'Attention To: Werner, Jeania-061'. A '*Distribute By:' dropdown is set to 'Qty', and a 'SpeedChart:' field is present. At the bottom, the 'Accounting Lines' section is active, showing tabs for 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Asset Information' tab is selected, displaying a table with columns for 'AM Business Unit', 'Profile ID', 'Tag Number', 'CAP #', 'Sequence', and 'Empl ID'. The first row contains the values '00061', '50803', and empty fields for the other columns.

The example above indicates the item has defaulted (the AM Business Unit and Profile ID fields are populated) as an asset based on the dollar amount entered and UNSPSC category chosen on the line. If the user does not want the item to remain an asset, then he/she should remove the information from the AM Business Unit and Profile ID fields as needed. If the AM Business Unit and Profile are removed from the Requisition line, then it will not show as an asset on the resulting Purchase Order line. The user can also make an item an asset that is not automatically set as one by adding the AM Business Unit and Profile ID as needed. If the AM Business Unit and Profile are added to the Requisition line, then it will show as an asset on the resulting PO line.

The definition of an Asset Management (AM) asset is a capital asset purchase (or lease) where the total cost is \$500 or more (single line item) and the expected life is one year or longer.

Purchases of assets are not required to go to Asset Management if the cost is less than \$500 (single line item), unless the agency has a requirement to include certain items of a lesser value. For example, the Indiana State Police would like to track firearms under the amount of \$500 and can set them up as assets on the Requisition/PO. If the user is unsure as to whether or not something should be an asset, then he/she should consult the agency Asset Manager or Head Procurement Agent before making adjustments.

Setting up Amount Only line(s) for services

The user should verify whether or not each line of the resulting Purchase Order (PO) for services should be set as amount only. If so, the user should change the Distribute By option from Qty (Quantity) to Amt (Amount) as needed. This will allow the person who issues the PeopleSoft receipt to enter it by a dollar amount instead of a quantity.

The screenshot displays the 'Requisition Lines' interface. The main table shows a single line with the following details:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	2018 Snow Removal Services		1.0000	Year	15,000.00000	15,000.000

Below the table, there are several fields and options:

- Consolidate with other Reqs
- Override Suggested Vendor
- Shipping Line: 1, Due Date: [field], Quantity: 1.0000, Price: 15,000.00000
- Status: Active, *Ship To: 061MIS, Attention To: Werner, Jeania-061
- *Distribute By: Amt (selected), SpeedChart: [field]

At the bottom, there is an 'Accounting Lines' section with a table:

Line	Status	Dist Type	*Location	Percent	Merchandise Amt	GL Unit
1	Open		061PROC	100.0000	15,000.000	00061

The screenshot displays the 'Requisition Lines' interface for a second line. The main table shows the following details:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
4	STAPLES: Staples Colored File	STAPLES CONTRACT AND COMMERCIAL	3.0000	Box	7.13000	21.390

Below the table, there are several fields and options:

- Select All / Deselect All
- Pre-Encumbrance Balance: 85.56 USD
- Buttons: Add to Favorites, Add to Template(s), Modify Line / Shipping / Accounting, Delete

3. Modify Line/Shipping/Accounting information

The user must confirm the shipping and accounting (Chartfields) information for each line of the Requisition either line by line (see the Chartfield Information section) or through this process. He/she must select each line to be modified before clicking the button by this name.

Create Requisition

Modify Line / Shipping / Accounting

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1 Details Asset Information

Percent	Location	GL Unit	Fund	Account	Program	Dept	Bud Ref
1	<input type="text"/>	00061	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

Apply Cancel

To copy the Chartfields from the Define Requisition step the user should click the Load Values From Defaults link to populate them from the information entered.

The user can add multiple distribution lines to the Requisition lines by clicking the plus icon at the end of the row and adding/updating the required chartfield information to the additional line(s) added.

Once the user has made all corrections or modifications to the page he/she should click Apply to be taken to the Distribution Change Options page as shown below.

There are three (3) options for the user to choose from: 1) to have the changes affect all Requisition lines he/she should select All Distribution Lines 2) to have the changes affect only the Requisition lines chosen before making the changes he/she should select Matching Distribution Lines 3) if the user has made multiple changes to the Chartfields and wants to replace the old information with the new, he/she should select Replace Distribution Lines.

ORACLE

Employee-facing registry... Web Site Gallery... State of Indiana (US) Edit Requisition

Home | Worklist | Add to Favorites | Sign out

Distribution Change Options

For the selected requisition lines, apply distribution changes to

All Distribution Lines
Apply changes to all existing distribution lines.

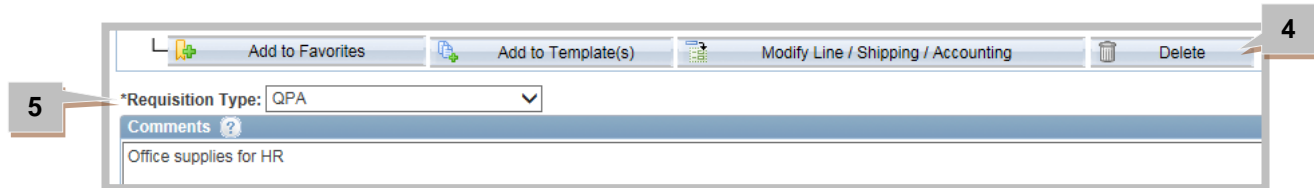
Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Description	Qty	Unit
Six 12 utility trailer	1	EA
Photo-copyer 4" Drop Hitch w...	1	EA
Total Lines	2	
Total Amount (USD)		2,947.000

The user should click OK to apply all of the changes to the lines as selected and to be returned to the Review and Submit page.



4. Delete

The user should select each line to be deleted before clicking this button.

5. Choose Requisition Type

The user must click the drop down arrow to the right of the field to select the type of Requisition being entered. **This is a required entry.**

Amendment, Amendment Info Tech, Amendment Grants, Amendment Property Lease, Procurement Contract Amendment, and Professional/Pers Cntrct Amend are contract types that should be used when making a change to a contract's term or conditions

Bid, RFP and Reverse Auction are to be used by IDOA Procurement only.

CHE SCM Contracts, Community Based, FSSA CMS Contract, all INDOT and Licensed Child Placing Agency types are agency specific.

Pub Works Job Order Contractor, Public Works Design, Public Works Emergency, and Public Works Preventive Maint should only be used when directed by IDOA Public Works.

Continuation Equip Lease Agree, Continuation Equip Lease Purch, Continuation Maint of Equipm, One Time Printing Purchase, Proc Serv Contract Continue and Small non-repetitive SDO are historical and should not be used.

Equipment Lease Agreement, Equipment Lease to Purch Agree, Grant, Info Tech Addendum, Info Tech Prof Services, Maintenance of Equipment, Memo of Understanding, Procurement Service Contracts, Professional Service Contract, Property Lease, Real Estate Purchase, and Residential are original contract types – consult the Professional Services Contract manual or Delegation of Purchasing Authority Program (DPAP) as to when they should be used.

Info Tech QPA Purchase and QPA should be used when making a purchase from a QPA contract.

Info Tech Renewal, Procurement Contract Renewal, Prof Serv Contract Renewal, Renewal Equipment Lease Agree, Renewal Equipment Lease Purch, Renewal Maintenance of Equip are contract types that should be used when renewing a contract.

Info Tech Special Procurement and Special Procurement are procurement methods that require the Special Procurement Request form to be completed and approved.

Inter-agency and Inventory are used by specific agencies – ask before using.

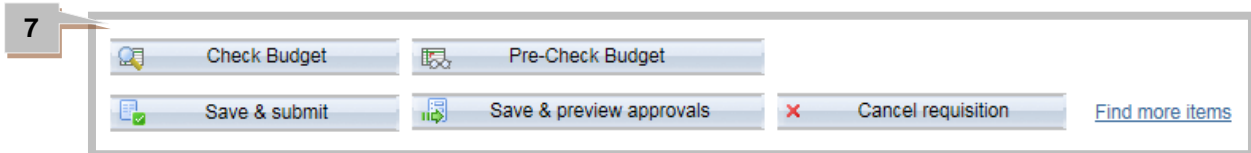
PEN Products to process can be used when purchasing from a PEN Products QPA or the PEN Products website.

Small Purchase is a purchases under \$75,000 that does not qualify as a QPA or contract type.



6. Add justification comments for Requisition

The user must click inside the justification field to enter all required information for the Requisition. This could include, but is not limited to, why the agency is purchasing outside current QPA, responding to the required justification questions and why this item/service is needed. There is a Display Comment Text in Modal Window icon to the right of the field which will open a larger field for typing purposes. When the user is finished typing in the field, he/she must click Return to return to the Review and Submit page. This information can be added to the RFQ form and/or Purchase Order by the user clicking the Send to Vendor checkbox; otherwise this justification is only placed on the Requisition. **This is a required entry.**



7. The buttons and links at the bottom of the page

Check Budget

If the user clicks Check Budget, it will run the process and pre-encumber the funds if the result is Valid. If the result is Error, then a problem exists with chartfield information. The user will have to update the fields as instructed and the process will need to be run again. This step is not necessary to save and submit the Requisition to workflow, the user must check with his/her agency as to when this step should be completed. **This process can be completed on the Manage Requisitions page at a later time.**

Pre-Check Budget

If the user clicks Pre-Check Budget, it will run the process and let the user know if the funds are available at that moment in time if the result is Provisionally Valid. However, it will not pre-encumber the funds. If the result is Error, then a problem exists with chartfield information. The user will have to update the fields as instructed and the process will need to be run again. This step is not necessary to save and submit the Requisition to workflow, the user must check with his/her agency as to if/when this step should be completed. **This process can be completed on the Manage Requisitions page a later time.**

Find more items link

If the user clicks this link, it will take the user back to the Add Items and Services step of the Requisition so additional items or services can be added.

Cancel requisition

If the user clicks Cancel requisition before saving or submitting, it will remove the information about the Requisition from PeopleSoft. If the user has saved the Requisition, it will only cancel the changes made after the save. To cancel the Requisition if previously saved, the user must navigate to the Manage Requisitions page.

Save & preview approvals

If the user clicks Save & preview approvals, it will result in the user being taken to the Confirmation page shown below. There must be at least one line item, chartfield information, a Requisition Type and a justification comment to complete this step. If there is a problem with chartfield information on the line(s), an error message will be displayed; the user will need to respond with OK to the message(s) to proceed. This process allows the user to save without submitting the Requisition to the approval workflow and to review a summary of the Requisition. On the Manage Requisitions page the status would be shown as Open.

From the Confirmation page the user can run the process to submit the Requisition to the approval workflow, edit the Requisition if necessary, pre-budget check or budget check the Requisition.

The screenshot displays the Oracle eProcurement 'Create Requisition' Confirmation page. The page is titled 'Confirmation' and contains the following information:

Requested For: Epro Training ID 1
Requisition Name: WELCOME1
Requisition ID: 0000016058
Business Unit: 00001
Status: Open
Priority: Medium
Budget Status: Not Checked

Number of Lines: 3
Justification: Ice melt, rock salt and water softener salt to replenish stock in Facilities Management

Procurement Agent: JW Catalog:Initiated (Not Routed) - Multiple Approvers (P\WF_SOL_PROCUREMENT_AGENT)

Division Approval: JW Catalog:Initiated (Not Routed) - Carr, Todd-D01 (Agency Dept Level 1)

Requisition Summary:

Description	Qty	UOM
Central Zone, Ice Melt, Ca...	10	BG
Central Zone, Rock Salt, 9...	10	BG
Central Zone, Water Soften...	10	BG
Total Lines:	3	
Total Amount (USD):	192,400	

Buttons at the bottom include: Submit, Edit Requisition, Apply Approval Changes, Check Budget, Pre-Check Budget. Links include: View printable version, Manage Requisitions, Create New Requisition.

Save & submit

If the user clicks Save & submit, it will place the Requisition into the agency's approval workflow and will result in the user being taken to the Confirmation page similar to the one above. On the Manage Requisitions page the status would be shown as Pending.

From the Confirmation page the user can edit the Requisition if necessary, pre-budget check or budget check the Requisition.

There are links at the bottom of Confirmation page to View a printable version of the Requisition, to access the Manage Requisitions page and to Create a New Requisition.

Using Manage Requisitions

After a Requisition has been saved and/or submitted to the approval workflow process the user can navigate to the Manage Requisitions page to take additional actions and to monitor the status.

Menu Navigation:

- eProcurement
- Manage Requisitions

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

The results retrieved will be displayed under the Requisitions banner and will provide several pieces of information about the Requisition(s) and allows the user to access other processes that can be completed.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 00061 Requisition Name: Request Status: All but Complete Budget Status: Date From: Date To: 04/24/2018 Requester: Entered By: PO ID:

Search Clear

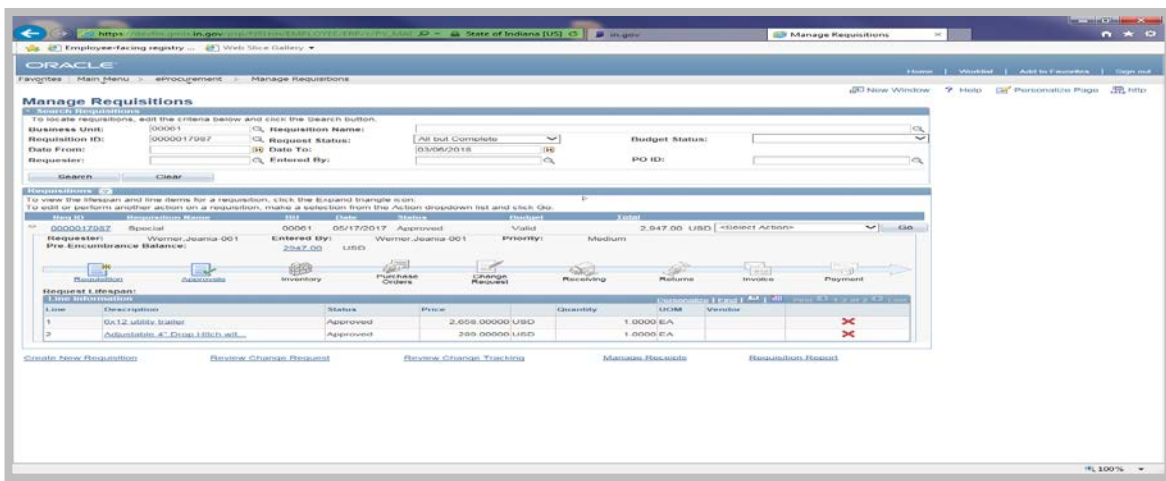
Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

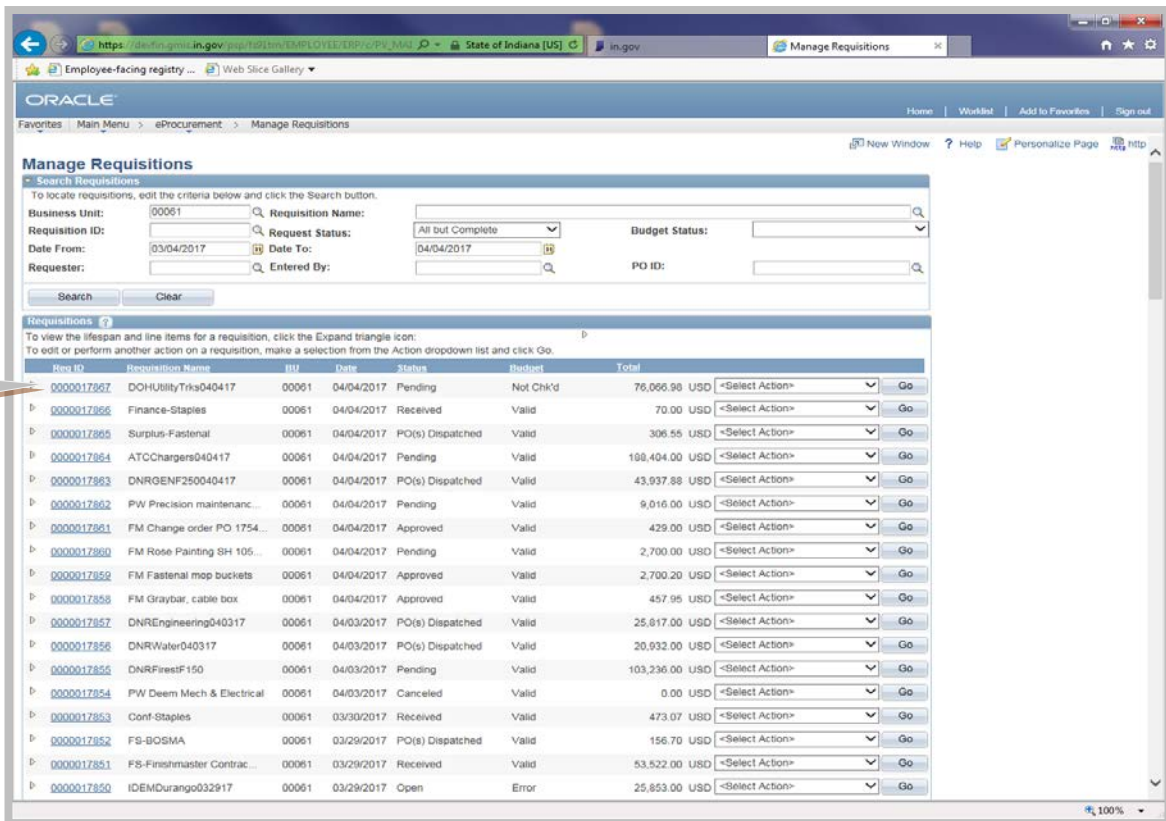
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000017987	Special	00061	05/17/2017	Approved	Valid	2,947.00 USD	<Select Action> Go

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

If the user clicks the expand icon to the far left of the Req ID number, it will provide a basic overview of the Requisition header and includes the Request Lifespan (the completed actions will be highlighted) and Line Information. The user can click the icon again to collapse the information.



If multiple Requisitions are returned, the information in the columns can be resorted by clicking the column name. The results can be reverse sorted by clicking the column name again.



1. Req ID

This ten digit number is assigned by PeopleSoft. If the user clicks the link, it allows him/her to view the Requisition Details as shown below. When done reviewing the details the user must click the Return to Manage Requisitions link to be taken back to the previous page.

Requisition Details								
Requisition Name	Requisition ID	Unit	Date	Status	Total			
Special	0000017987	00061	05/17/2017	Approved	2,947.00			
Pre-Encumbrance Balance:		2,947.00	USD	Req Type: Small Purchase				
Header Comments:								
Comment 1: Utility trailer and hitch for fleet services								
Line	Item Description	Source	Status	Amount Only	Qty	Price	Status	Total
1	6x12 utility trailer	Available		N	1.0000 Each	2,658.00000 USD	Approved	2,658.000
2	Adjustable 4" Drop Hitch wit...	Available		N	1.0000 Each	289.00000 USD	Approved	289.000

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

The user can also view details about the line items (by clicking the description link and/or the expand icon for each blue line under the item description column header) and by clicking the Requisition Schedule and Distribution link at the bottom of the page. The following screenshots show more detail as to what will be displayed. After the user has reviewed the information, he/she can click the Return to Previous page link to return to this page and then the Return to Manage Requisitions link.

Item Description page

Item Description			
6x12 utility trailer			
No image for this item	Req Price:	2658.00000	
	Item ID:		
	Category:	Flatbed trailers	25181702
	Vendor:	N/A	
	Vendor Item ID:	N/A	
	Manufacturer:	N/A	
	Mfg Itm ID:	N/A	

[Return to Previous Page](#)

Requisition Schedule and Distribution page

Requisition Schedule and Distribution New Window

Business Unit: 00061 Requisition ID: 0000017987 Total Amount: 2,947.000 USD
 Requester: J005563 Req Name: Special Status: Approved Date: 05/17/2017

Line View All First 1 of 2 Last

Line: 1 6x12 utility trailer Quantity: 1.0000 UOM: EA Item Price: 2,658.00000 USD

Schedule View All First 1 of 1 Last

Sched: 1 Ship To: 061MIS Due Date: Attention To: Werner, Jeania-061
 Quantity: 1.0000 Item Price: 2,658.00000 Merchandise Amount: 2,658.000 USD

Distribution Personalize First 1 of 1 Last

Details More Details Mgrs Details 2 Asset Information Budget Information **EFF**

Dist #	Status	Dist Type	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event	Fund	Account	Program	Dept	Bud Ref	PC Bus Unit
1	Open		061PROC	1.0000	2,658.000	100.0000	00061		10560	555508	10000	039095	2017	

[Return to Previous Page](#) [Return to Manage Requisitions](#)

Requisitions ?

To view the lifespan and items for a requisition, click the Expand triangle icon.
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000017987	Special	00061	05/17/2017	Approved	Valid	2,947.00 USD	<Select Action> Go

2. Requisition Name

This shows the name entered by the user or the Req ID number if it was not named prior to saving.

3. BU

This shows the five digit version of the Business Unit being charged.

4. Date

This shows the date the Requisition was created.

Requisitions ?							
Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000017987	Special	00061	05/17/2017	Approved	Valid	2,947.00 USD	<Select Action> Go

5. Status

The following statuses may be seen: Open (not submitted to workflow), Pending (workflow approval not yet completed), Approved (workflow approval completed), Cancelled (the Requisition was initially saved and later cancelled), PO(s) Created (the Requisition Expediter or Strategic Sourcing Event award process has been completed), PO Dispatched (the Purchase Order has been electronically or manually dispatched/sent to the vendor), Partially Received (at least one of multiple receipts has been issued), Received (all lines received) and Complete (the encumbrance management process has been run after all receipts and payments have been made). In order to progress to a Strategic Sourcing Event or Purchase Order the status must be Approved.

6. Budget

The following statuses may be seen: Valid (pre-encumbrance created), Error (problem(s) with chartfield information that will have to be resolved by the agency and the process run again) or Not Chk'd (process not run). In order to progress to a Strategic Sourcing Event or Purchase Order the status must be Valid.

7. Total

This shows the total dollar amount of the Requisition. This generally is an estimate of the final purchase amount unless the Requisition was created from items found in a QPA catalog.

8. Additional actions that can be completed

The states of the status and budget will determine the choices available in dropdown to the right of the Select Action. They may include: changing the Buyer, canceling the Requisition, budget checking, copying the Requisition, editing the Requisition (to make changes after the original save), reviewing the Requisition cycle, viewing the history of approvals and viewing a printable version of the Requisition (follow the instructions for Printing a Requisition beginning at the process monitor section). After making a selection, the user must click Go to proceed.

Printing a Requisition

There are two options to print a Requisition from the Manage Requisitions page.

The first option is for the user to locate the specific Requisition and select View Printable Version from the drop down menu to the right before clicking Go. If this process is being run, then the user can skip to the Process Monitor section in the instructions below.

The second option is for the user to click the link at the bottom of the page titled Requisition Report. The user will be creating or searching for the Run Control for printing a Requisition. If the user is running the Requisition Report process for first time, then he/she must click on the Add a New Value tab, in the Run Control ID field the user should type PRINTREQ and click Add. After adding the Run Control ID name the first time, the user should click the Find an Existing Value tab to search for and click the run control named PRINTREQ.

On the Print Requisition page the user must enter the five digit Business Unit and the ten digit Requisition ID in the corresponding fields. The user should verify that in the Statuses to Include area that all five statuses are checked, that the selection underneath is On Hold and Not On Hold and click Run.

Print Requisition

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

Language: English Specified Language Recipient's Language

Report Request Parameters

Business Unit: 00300

Requisition ID: 0000076996

From Date:

Through Date:

Requester:

Statuses to Include

Approved

Canceled

Completed

Open

Pending

On Hold AND Not On Hold

The Process Scheduler Request page is used to select the server on which the process will be run. The user should be sure the Server Name field is blank; this allows the process to run on the first available server. The user must then click OK to run the creation process.

Process Scheduler Request

User ID J005563 Run Control ID PRINTREQ

Server Name

Recurrence

Time Zone

Run Date 04/24/2018

Run Time 12:48:23PM

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web <input type="button" value="v"/>	PDF <input type="button" value="v"/>	Distribution

From the Print Requisition page the user must click the Process Monitor link.

Print Requisition

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

Language: English Specified Language Recipient's Language Process Instance:16388199

To access the Requisition for printing under the Process List banner the Run Status column must display Success and the Distribution Status column must display Posted on the process just begun. The user will need to click Refresh about every eight seconds until both have become the required status. The user must click the Details link on the same row to be taken to the next page.

Process List
Server List

View Process Request For

User ID: J005563 Type: Date Range From 04/23/2018 To 04/24/2018

Server: Name: Instance to

Run Status: Distribution Status: Save On Refresh

Process List
Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Control ID	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	16388199		SQR Report	PORQ010	J005563	PRINTREQ	04/24/2018 12:48:23PM EDT	Success	Posted	Details

[Go back to Requisition Print](#)

Process List | [Server List](#)

On the Process Detail page the user must click on the View Log/Trace link.

Process Detail

Process	
Instance	16388199
Name	PORQ010
Run Status	Success
Type	SQR Report
Description	Requisition Print SQR
Distribution Status	Posted

Run	Update Process
Run Control ID	PRINTREQ
Location	Server
Server	PSNT
Recurrence	
	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Restart Request

Date/Time	Actions
Request Created On	04/24/2018 12:49:22PM EDT
Run Anytime After	04/24/2018 12:48:23PM EDT
Began Process At	04/24/2018 12:49:43PM EDT
Ended Process At	04/24/2018 12:49:57PM EDT
	Parameters Transfer Message Log Batch Timings View Log/Trace

OK Cancel

The user should locate and click the link with the name ending in PDF to open the file to review/print/save a copy of it before closing the tab.

View Log/Trace

Report	
Report ID:	19645585
Name:	PORQ010
Run Status:	Success
Process Instance:	16388199
Process Type:	SQR Report
	Message Log
Requisition Print SQR	

Distribution Details	
Distribution Node:	HTTP
Expiration Date:	05/01/2018

File List		
Name	File Size (bytes)	Datetime Created
PORQ010_16388199.PDF	6,671	04/24/2018 12:49:57.104334PM EDT
PORQ010_16388199.out	349	04/24/2018 12:49:57.104334PM EDT
SQR_PORQ010_16388199.log	1,790	04/24/2018 12:49:57.104334PM EDT

Distribute To	
Distribution ID Type	*Distribution ID
User	J005563

Return

REQUISITION

1 Ship To: IDOA, MIS Division
402 W WASHINGTON ST RM W478
INDIANAPOLIS IN 46204

Bill to: Indiana Dept of Administration
Controller's Office
402 W WASHINGTON ST RM W478
INDIANAPOLIS IN 46204

2

Requisition No.	Date	Required Date	Page
0000017975	05/17/2017		1 of 1

Fund/Account: 10560 / 533025
 Dept Number: 039095
 Project Number:
 Requisition Number: 0000017975
 Requestor: J005563 Werner, Jeania-061
 Agency Number: 00061 Administration
 Facility:

MUST COMPLETE FOR ICPR
 Print REQ
 Streamline Eligible

Line	Item	Description	Quantity	UOM	Unit Price	Ext Amt
3	1-1	Utility trailer and hitch for fleet services 6x12 utility trailer	1.0000	EA	2,658.0000	2,658.00
		2018 model year				5
4	2-1	Adjustable 4" Drop Hitch with 2" Shaft	1.0000	EA	289.0000	289.00
		The following UN/CEFACT Unit of Measure Common Codes are used in this document: EA Each				
Requisition Total \$						2,947.00

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Requestor Signature	I certify that the item[s] requested is [are] necessary for the operation of this State Agency. Printed Name of Agency Head or Authorized Employee	Authorized Signature
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State Form 21301 (Revised 7/02) Approved by State Board of Accounts - 2002

1. The upper left will contain the Ship To and Bill To information.
2. The upper right will contain the Requisition number and some identifying information.
3. If set up, header comments will print just underneath the line item banner.
4. The Requisition line(s) will print below the header comments.
5. If set up, line comments will display just below the line information.
6. The bottom of the last page will have a place for signatures.

Document Status

Every component of PeopleSoft Financials has a Document Status page associated with it. For Requisitions it is located at

Menu Navigation:

- Main Menu
 - Purchasing
 - Requisitions
 - Review Requisition Information
 - Document Status

After the desired Requisition has been found, the page will give information about the Requisition at the top and every document currently associated with it will be displayed under the Associated Document banner. It can include: Contracts, Purchase Orders, Receipts, Accounts Payable Vouchers and Payments and their associated statuses and dates. The user can open blue links to review the content.

Document Status

Business Unit: 00061 Req ID: [0000019101](#)
Document Date: 03/22/2018 Status: Approved
Currency: USD Document Type: Requisition
Requester: Nancy L Morris - 00061 Merchandise Amt: 1,967.820
Budget Status: Valid

Associated Document

SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
STIND		Contract	000000000000000000013900	Approved	06/24/2015	0000050293		
	00061	Purchase Order	0018548370	Dispatched	03/28/2018	0000050293	000002	
	00061	Purchase Order	0018548371	Compl	03/28/2018	0000050293	000002	
	00061	Receipt	0000050839	Moved	02/27/2018	0000050293	000002	
	00061	Receipt	0000050840	Moved	02/28/2018	0000050293	000002	
	00061	Receipt	0000050841	Moved	02/25/2018	0000050293	000002	

[Return to Search](#)

PeopleSoft Buyers should find the guide titled **Creating Purchase Orders using Expedite Requisitions** to take an Approved and Valid Requisition to a Purchase Order or the **Strategic Sourcing** guide to solicit bids and make an award to a Purchase Order or a **General Contract**. These manuals and other helpful resources can be found at <http://www.in.gov/idoa/2871.htm>.