Indiana Department of Administration
Procurement Division

PeopleSoft eProcurement

Creating Requisitions

Version 18.5-07

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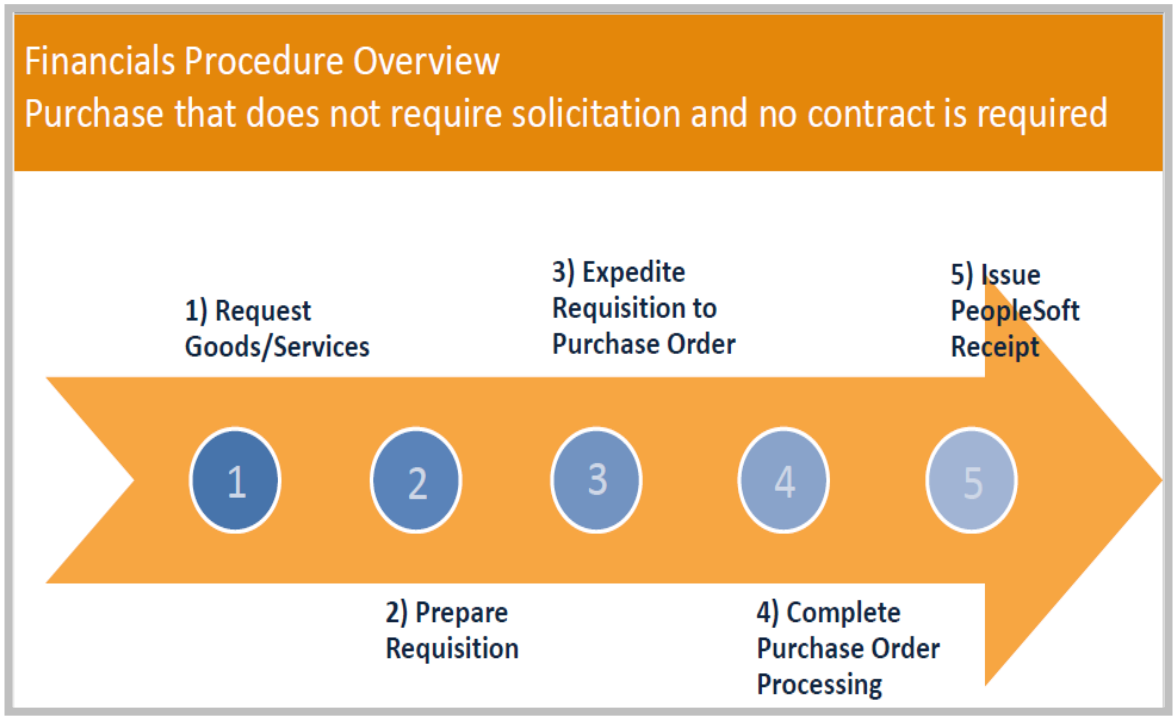
Financials Procedure Overview
Purchase that does not require solicitation and no contract is required
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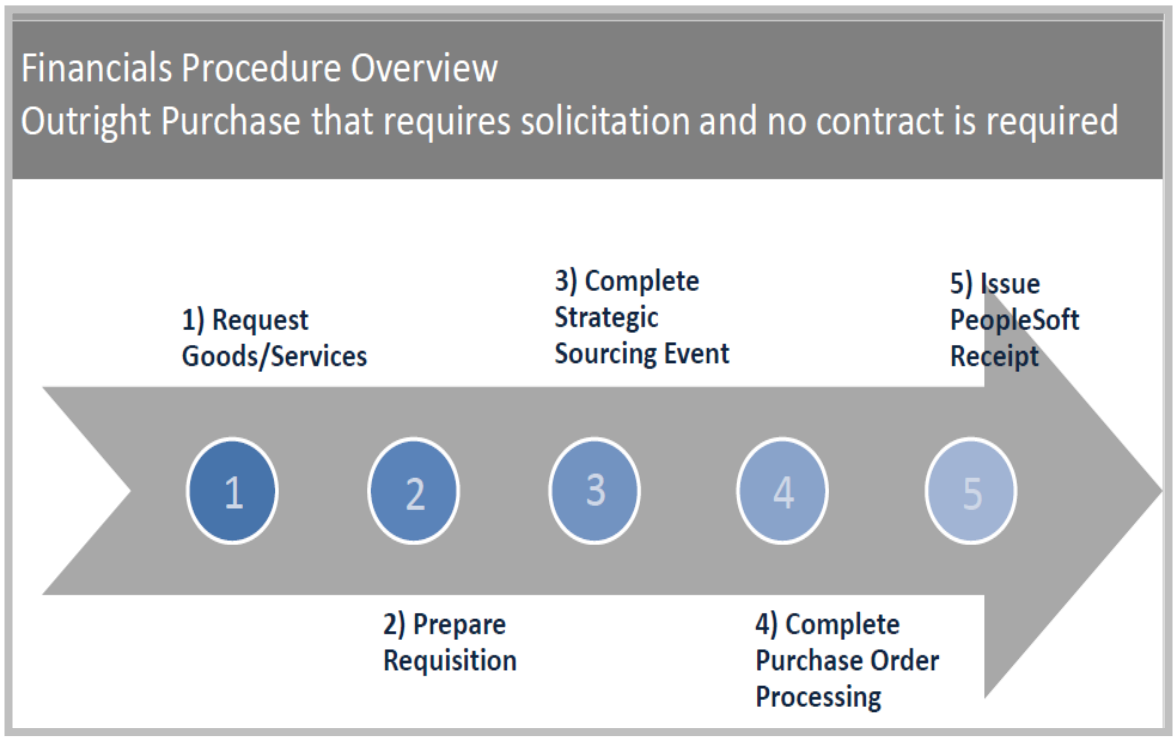
Financials Procedure Overview
Outright Purchase that requires solicitation and no contract is required
1) Request Goods/Services
2) Prepare Requisition
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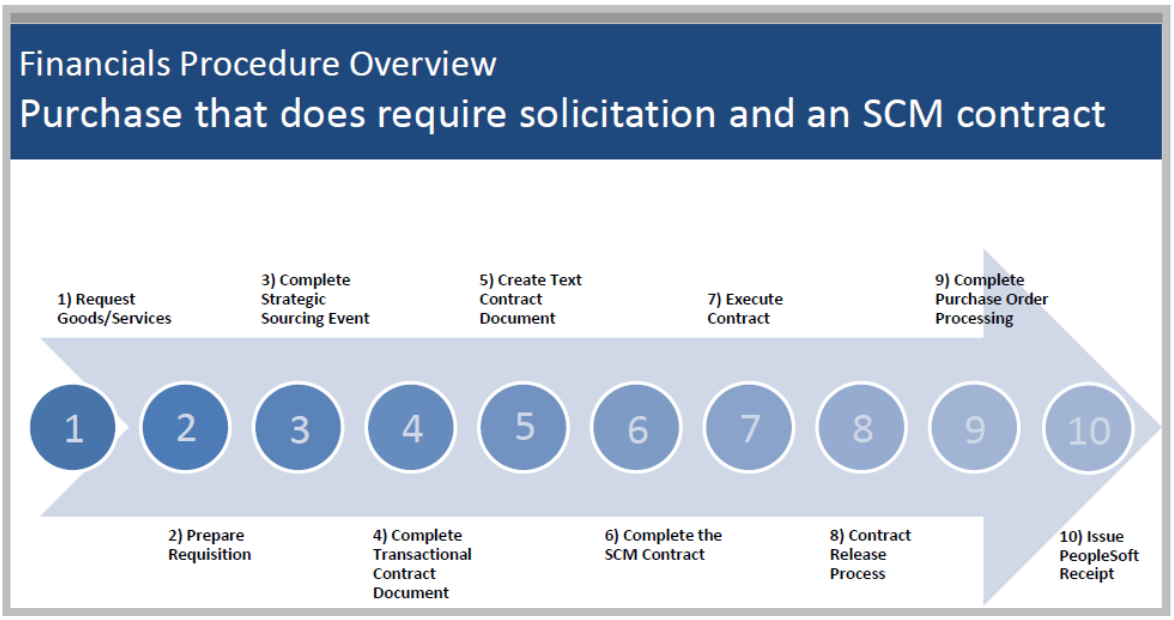


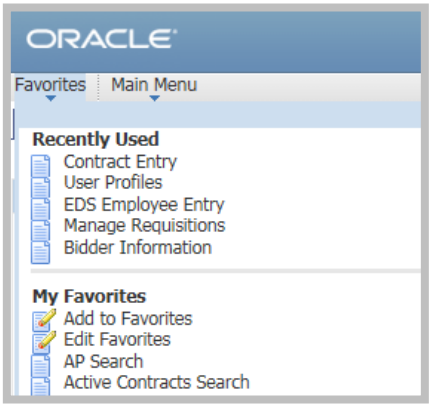
PeopleSoft Basics

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:

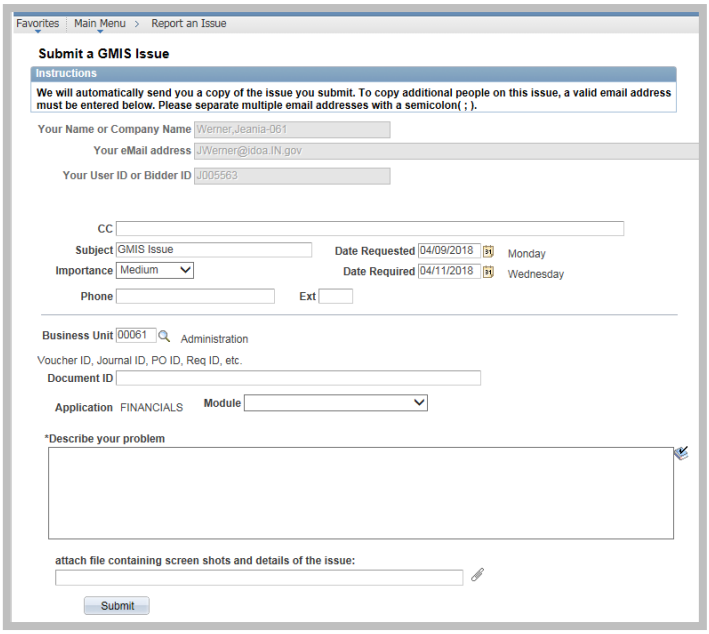
Recently Used will display the last five places the user visited in the application. He/she can click one of the choices to be taken directly to the page.

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.

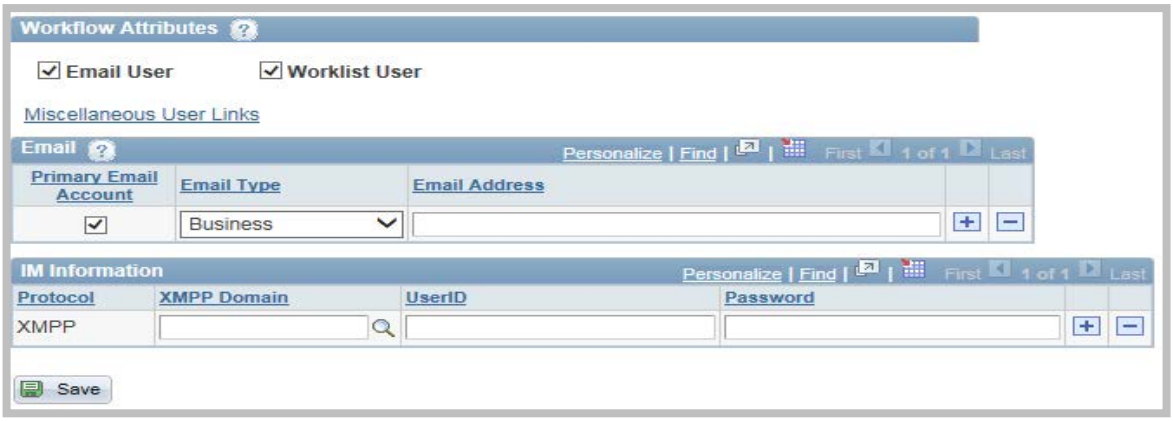
There is an option to attach a file containing screen shots and details of the issue which is another method to convey information to the GMIS team member assigned to it. The user must click Submit to begin the three part resolution of the issue: the user will receive an immediate email confirming the 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 GMIS team member has additional questions.

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.



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.

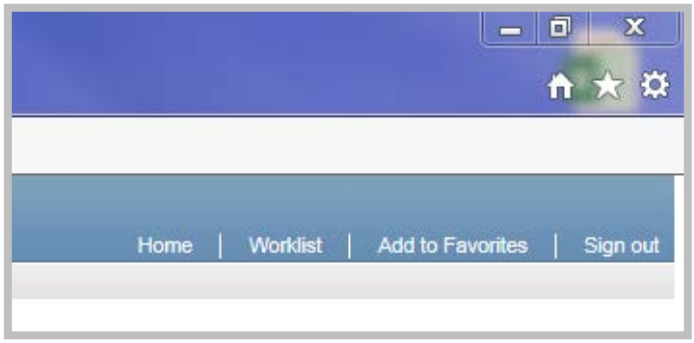
Home, Worklist, Add to Favorites and Sign Out

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

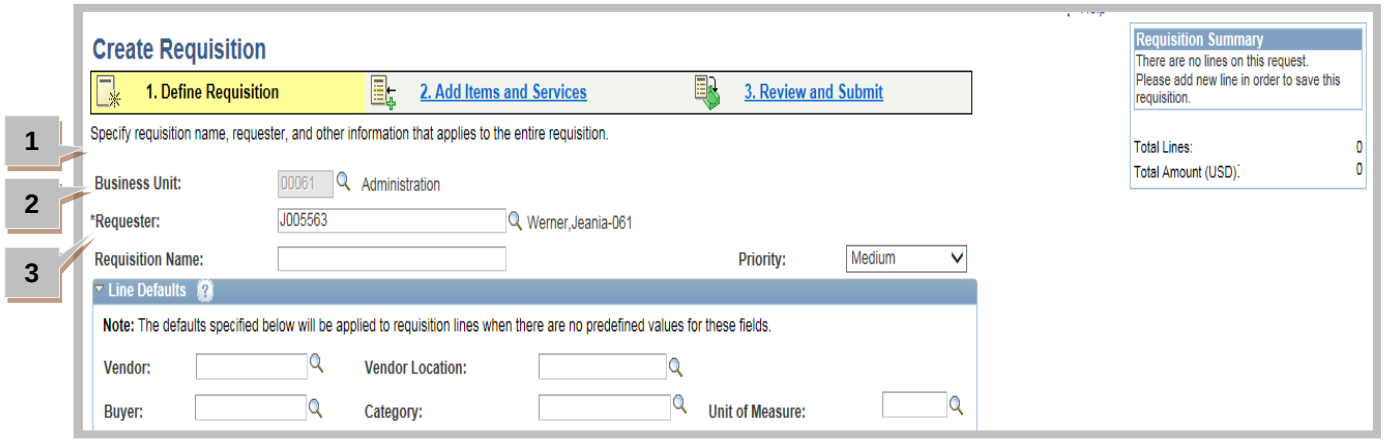
The user must not rely on the name of a field or an assumption as to how it might be used to complete it. The technical and business process requires that very specific information is entered in a specific manner and place. Any data field not discussed specifically should remain blank or as it appears 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.



1. Business Unit

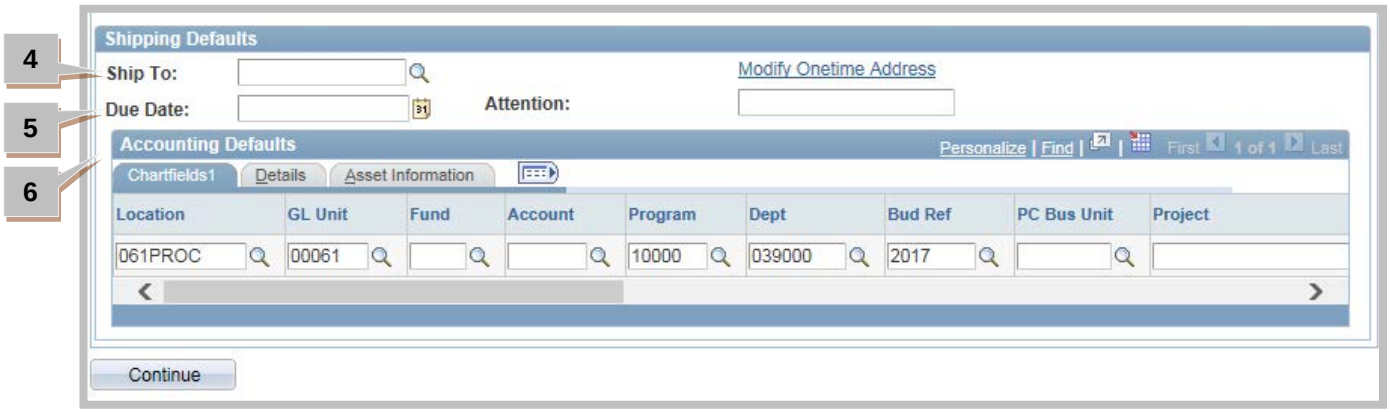
The user will have a default value populated here. It can be edited if the user has been given access to multiple business units and needs to reference a different one.

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.



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)

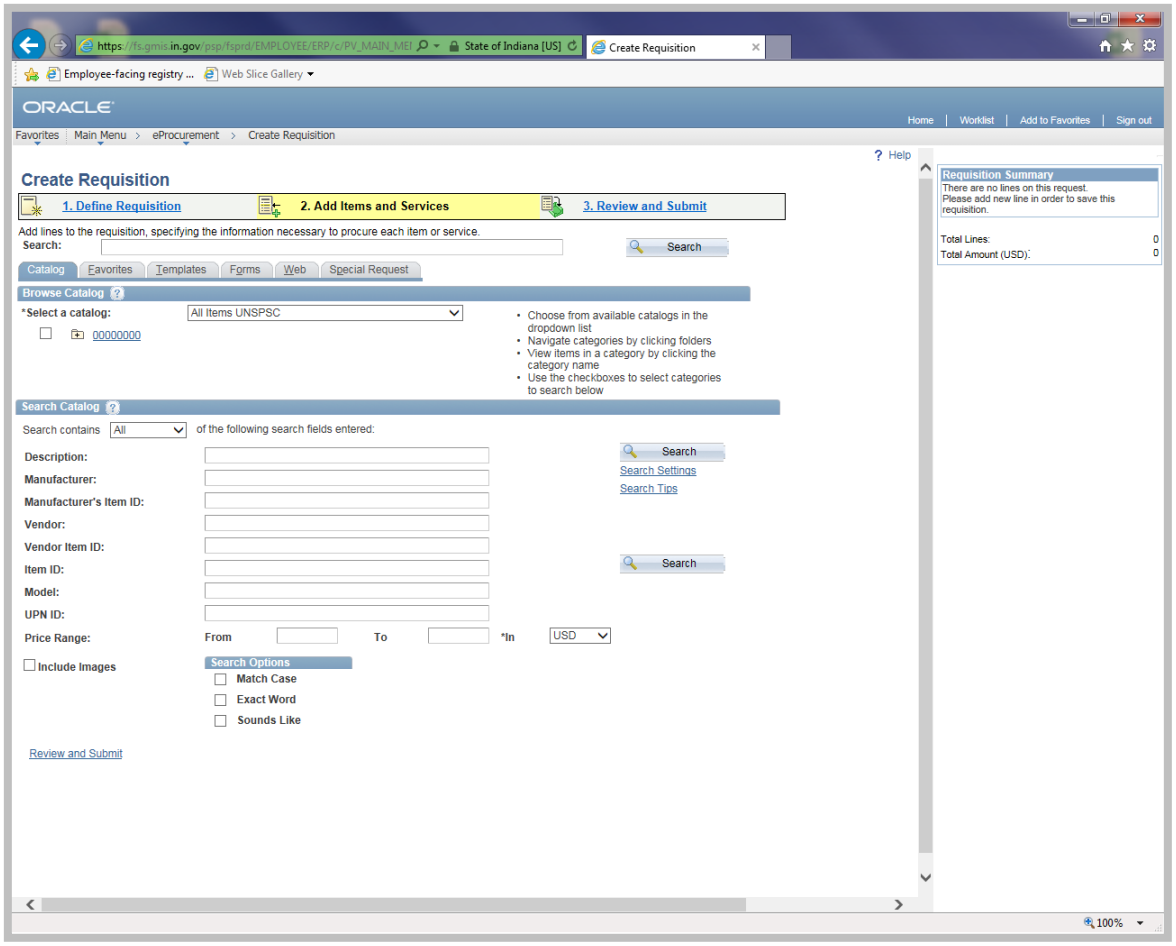
Option 2: Add Items and Services from the Web tab (QPAs with a Punch-out catalog)

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 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.

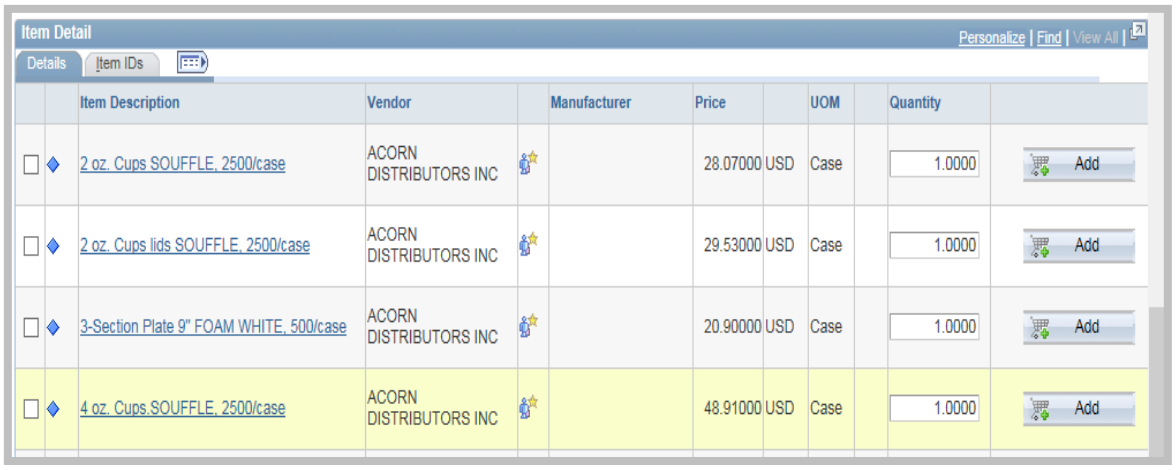
Item ID

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.**

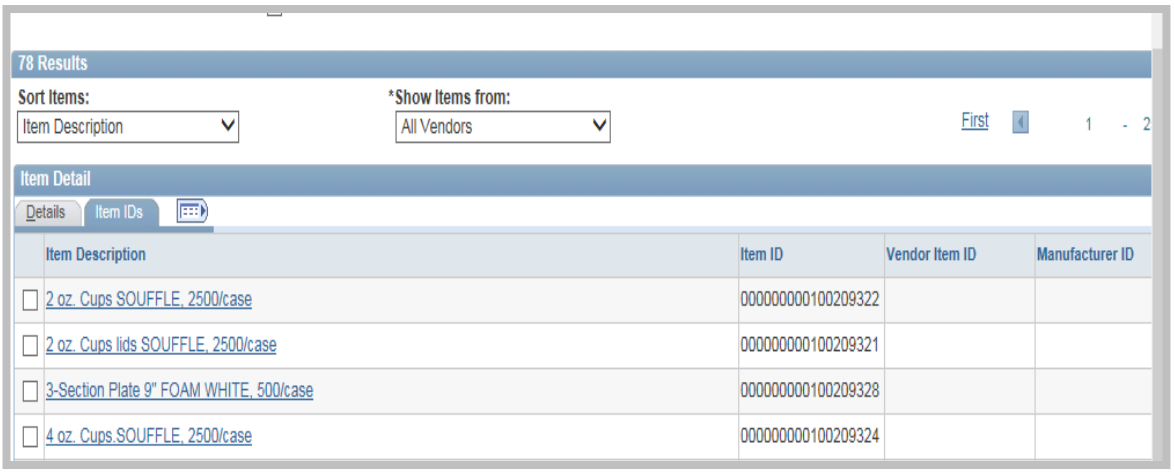
After entering the search criteria the user should click either Search button to allow PeopleSoft to return all of the items that meet the criteria. If there are multiple vendors for one catalog item, then when the item is returned the user should click on the Item Description link and it will return 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.



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.



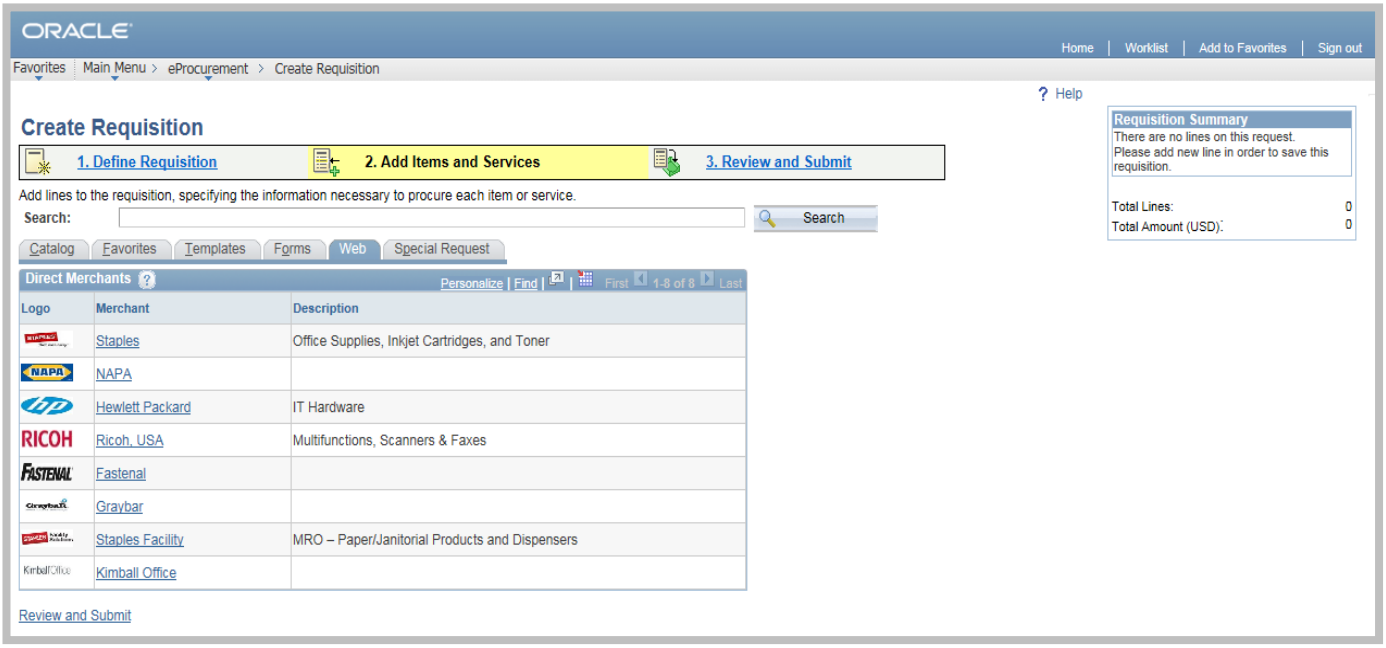
The user can either review the details on both tabs or click on the Show All Columns icon (to the right of the Item IDs tab) to display all of the information one on page.

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.



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

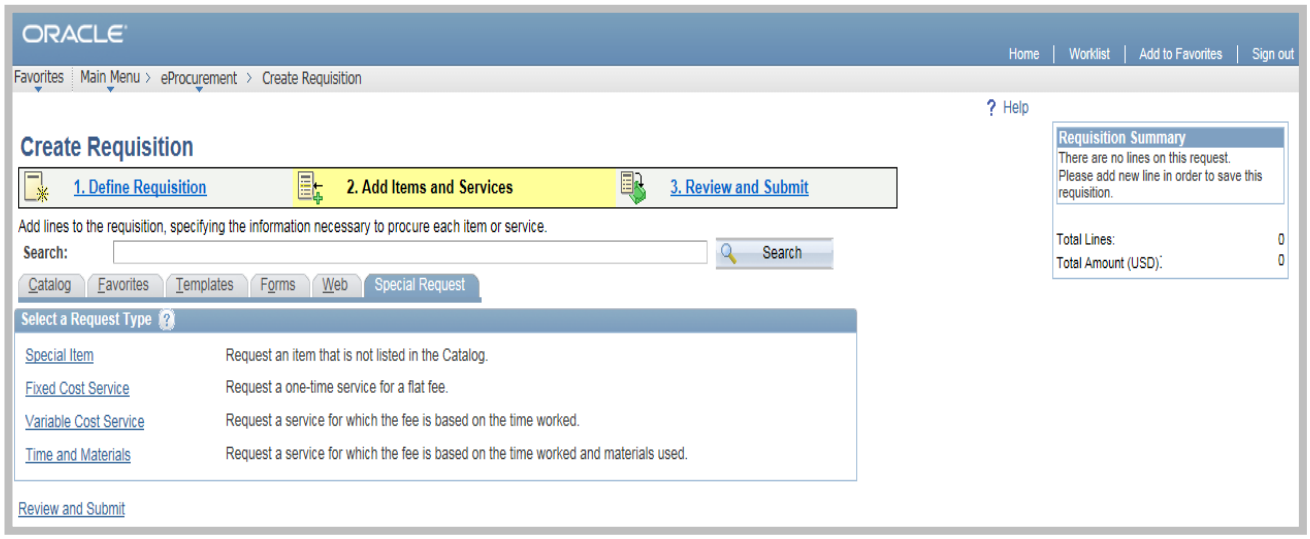
The user should keep in mind that while on the vendor's web site he/she still has the 20 minute time frame to return to PeopleSoft before being timed out.

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.

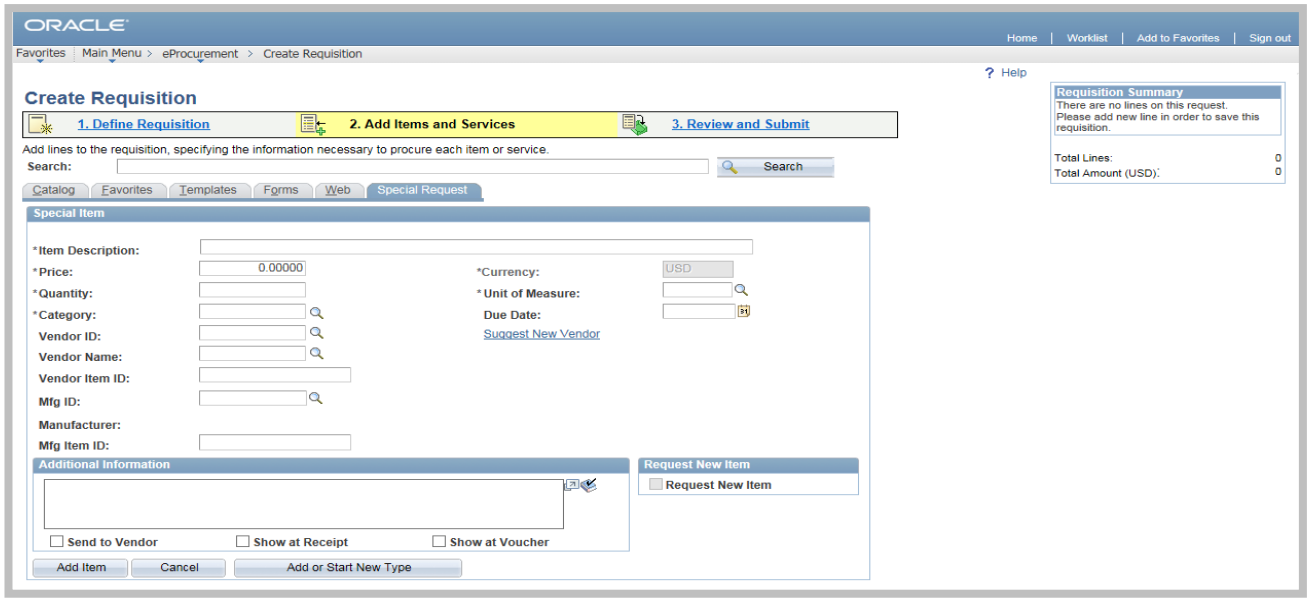
Add Items and Services
Option 3 - from the Special Request tab

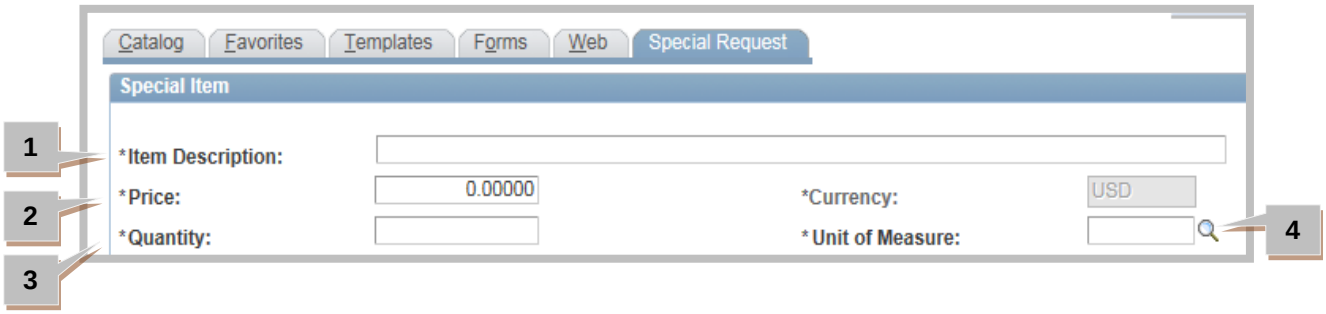
The user should select this tab if entering QPA items not associated with an item number or a punch-out catalog, for items available from the PEN Products or Ability Indiana catalogs that are not tied to a current QPA and for items/services that must have a solicitation done, an award made and/or a contract 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 user will need to complete the required entries (they are marked with an *) about the item/service being purchased.





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

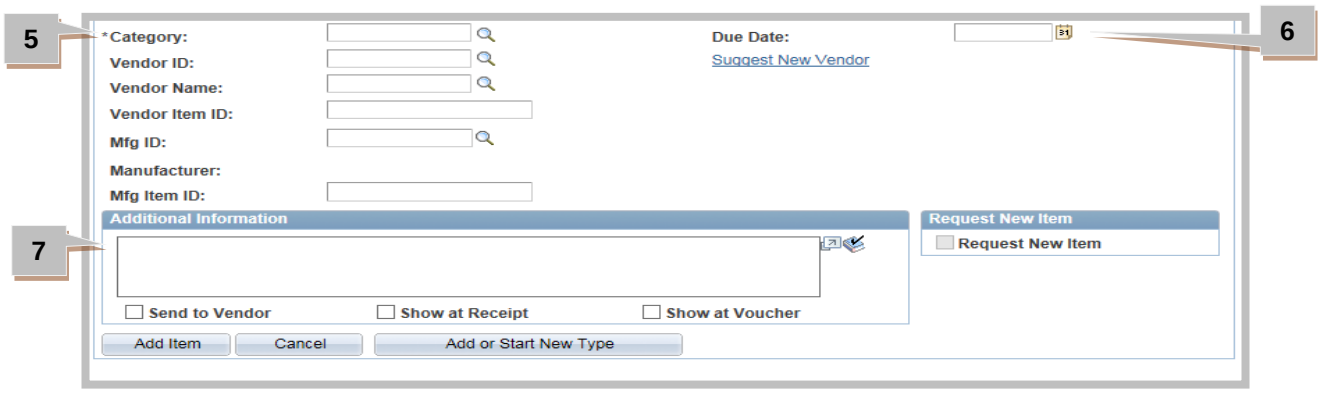
- Prior to entering the Requisition/PO, the project administrator should create projects for the future years covered by the contract, regardless of the type of contract (service, lease, etc.).

- 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.

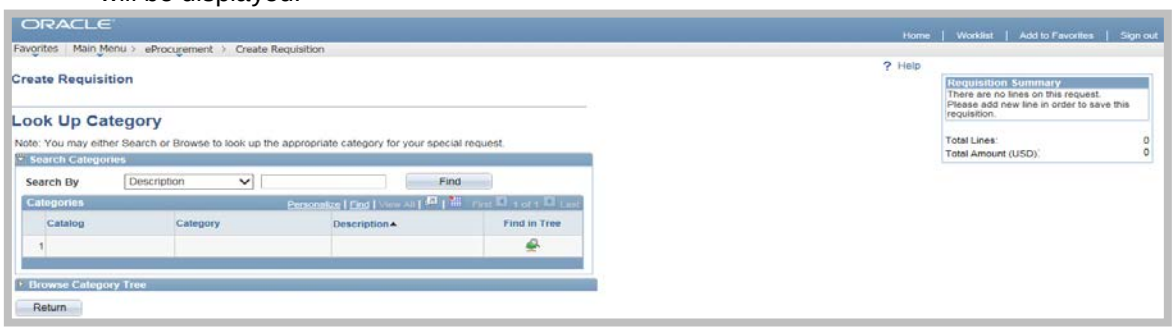
- Create the PO, using multiple lines for future years, utilizing 'dummy' projects.

- 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.

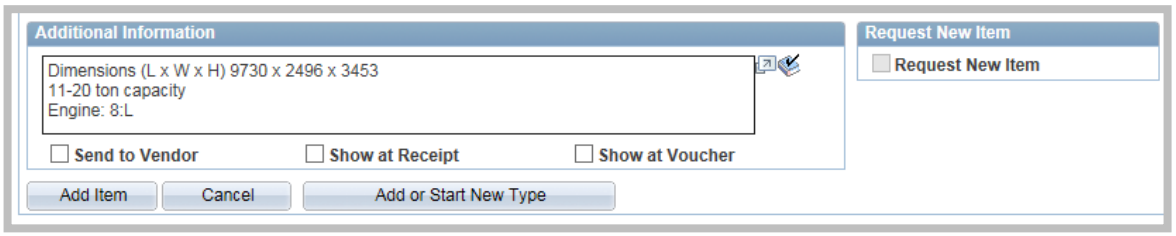
The UNSPSC category chosen drives the account number defaulted on the line, whether or not the item is automatically set up as an Asset (see the Asset Information section) and the approval routing on the Requisition.

6. Due Date

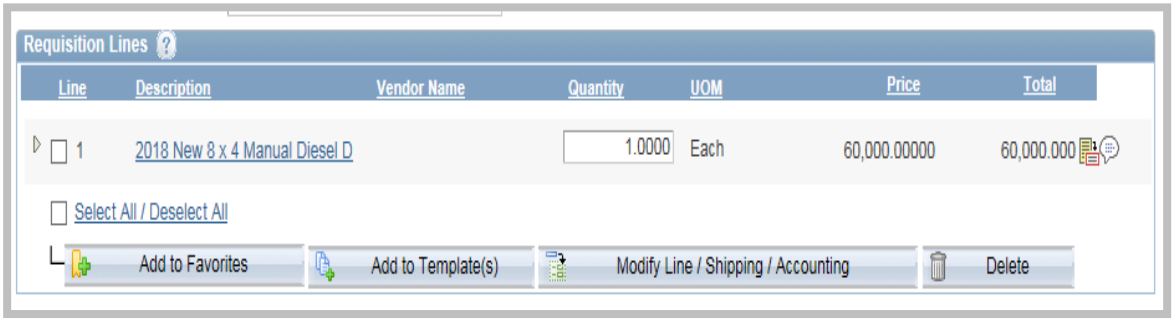
The user should enter the date the items/services are to be delivered if it did not come forward from the Define Requisition page. The user can either enter the date in the format of MM/DD/YYYY or select the date by clicking on the date page icon to the right of the field.

7. Additional Information

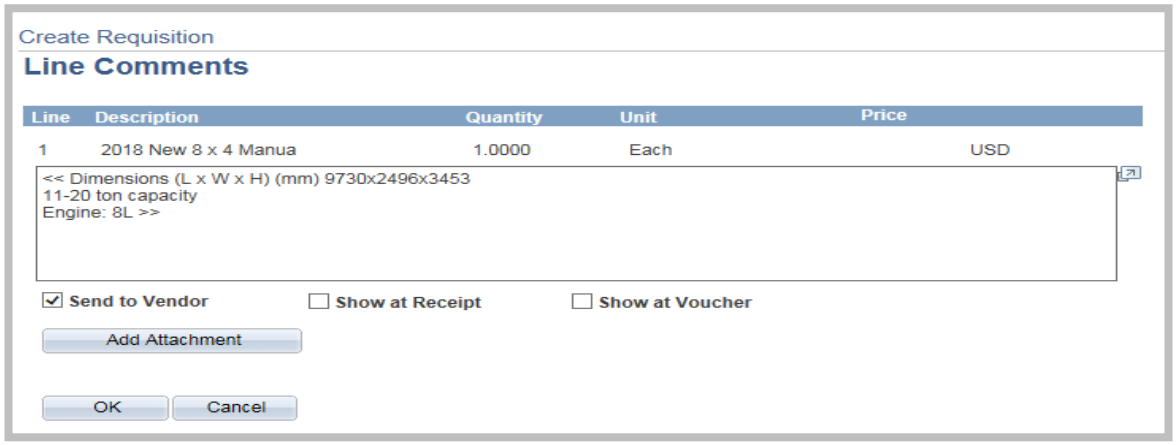
The user can enter any additional description, specifications or other information in the Additional Information field. He/she must be sure to click the Send to Vendor checkbox if the information should print on the Requisition, Request for Quote form and/or the resulting Purchase Order form.



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



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

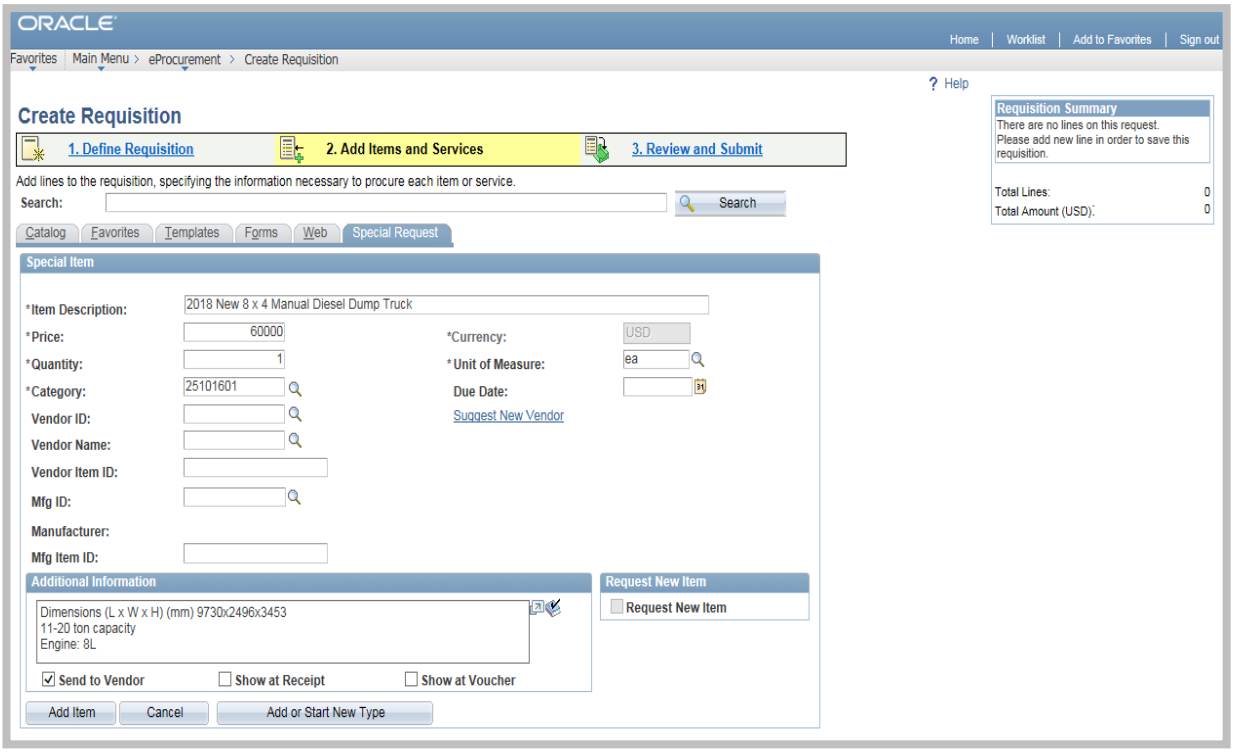


The user can make changes/additions to the line comments by typing the information in the field; when finished he/she should click OK. The new information entered will stay only with the line comments – it will not update the additional information field on the item description.

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.



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

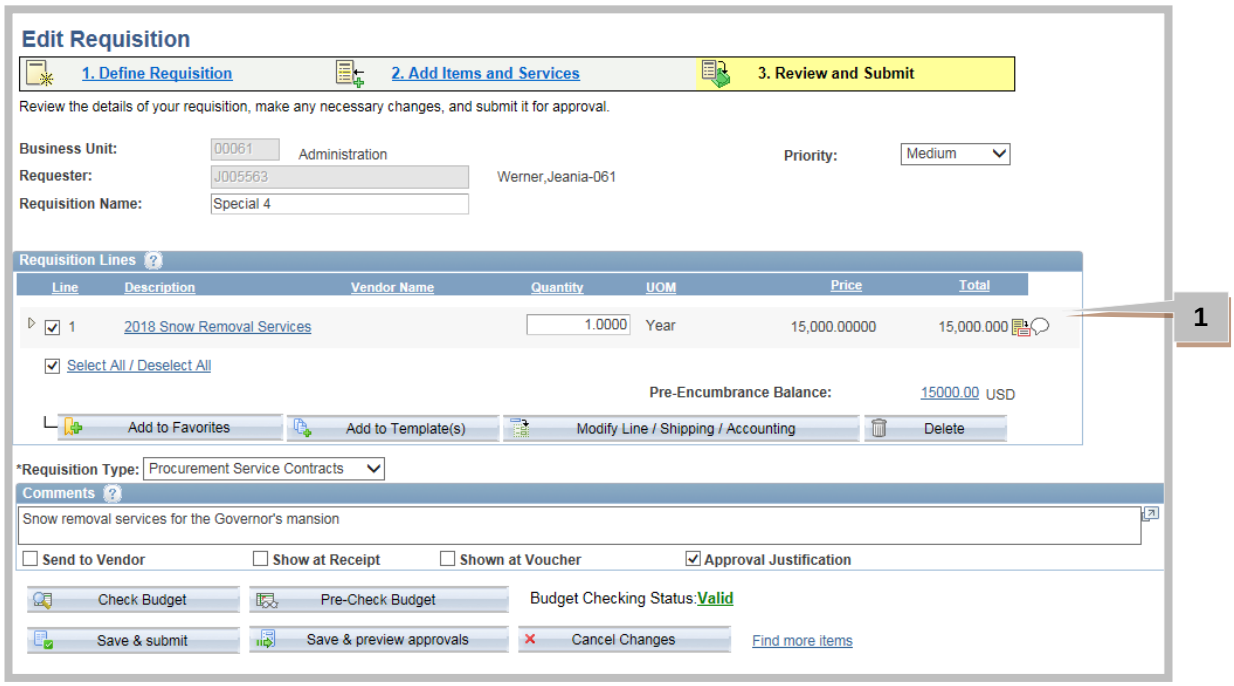
Once the user has completed all the required entries for the item or service, he/she should click either Add Item or Add and Start New Type to add the item to the Requisition. If only one item is needed, he/she should click Add Item. If more items are needed, he/she should click Add and Start New Type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

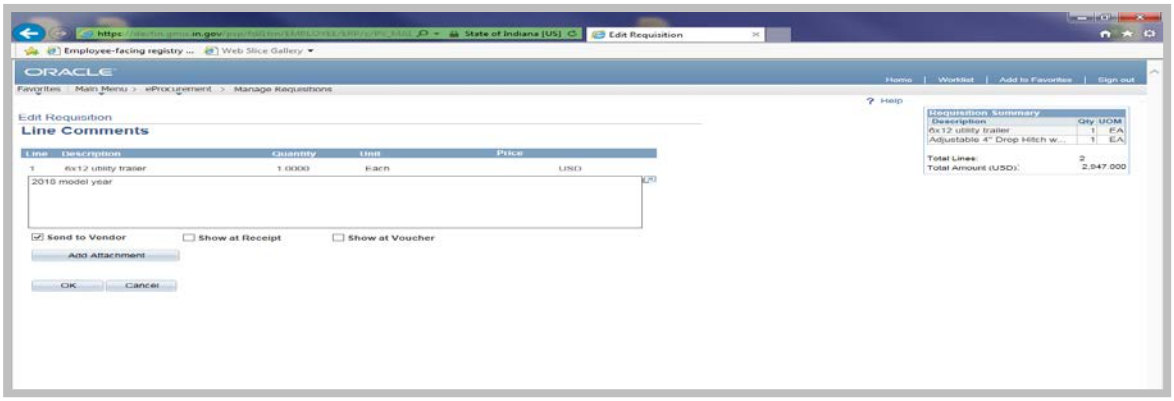
Review and Submit

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



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

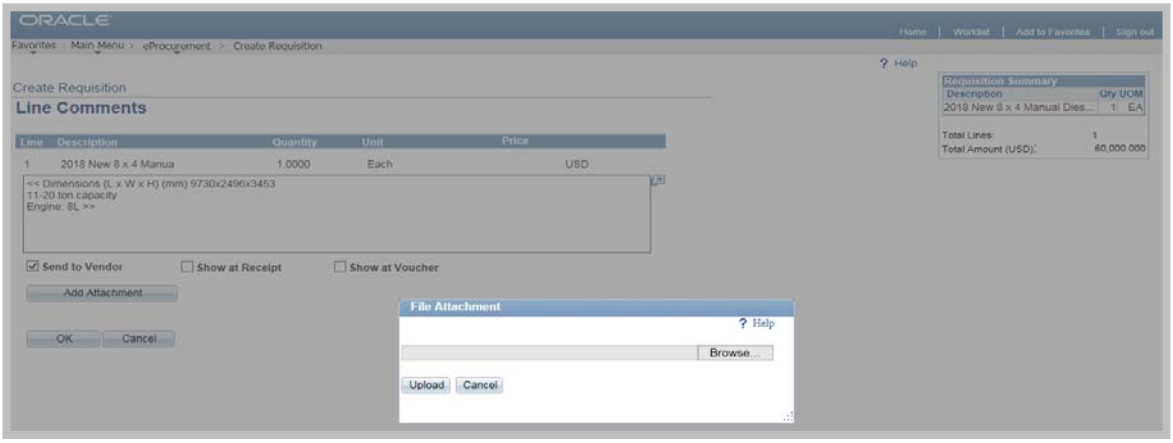
The user should click on the Comments icon at the end of the Requisition line to open the Line Comments page.



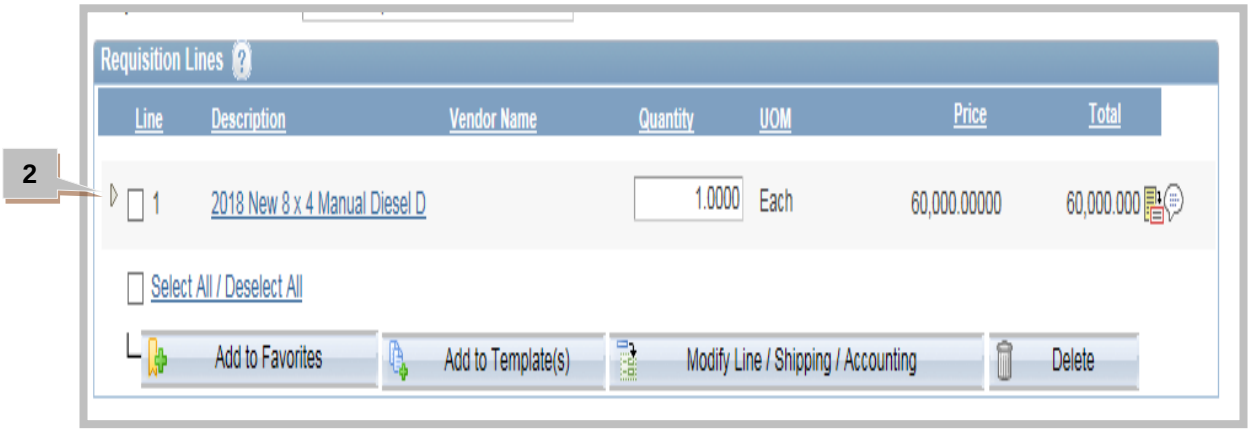
The user can edit or add the desired information in the field or use the Display comment text in modal window icon to enlarge the field. If the comment needs to be printed on the Requisition, RFQ form and/or Purchase Order, the user should select the **Send to Vendor** checkbox. If no attachments need 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.



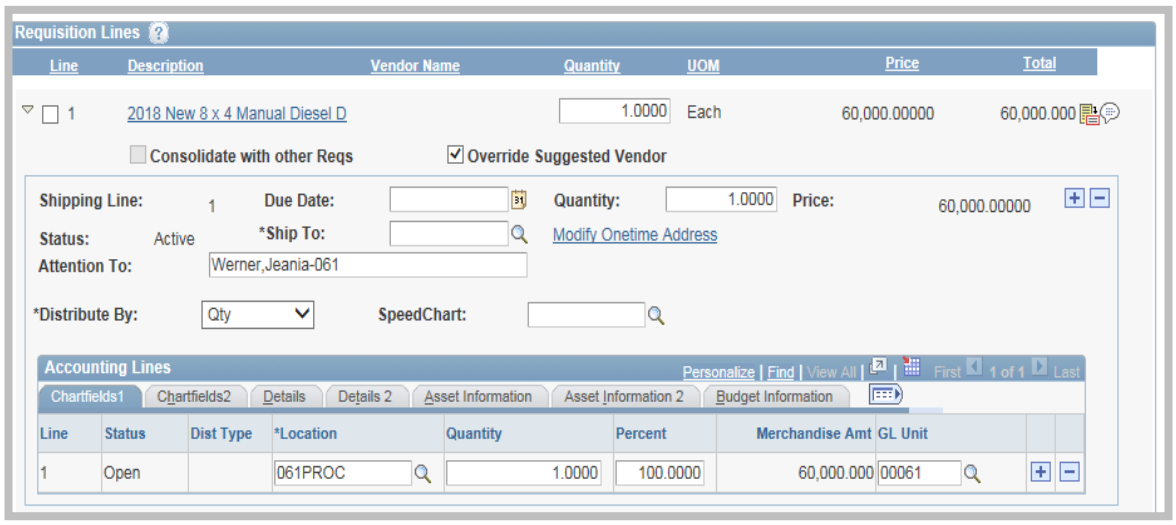
2. Verifying/updating information on the Requisition Line(s)

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.

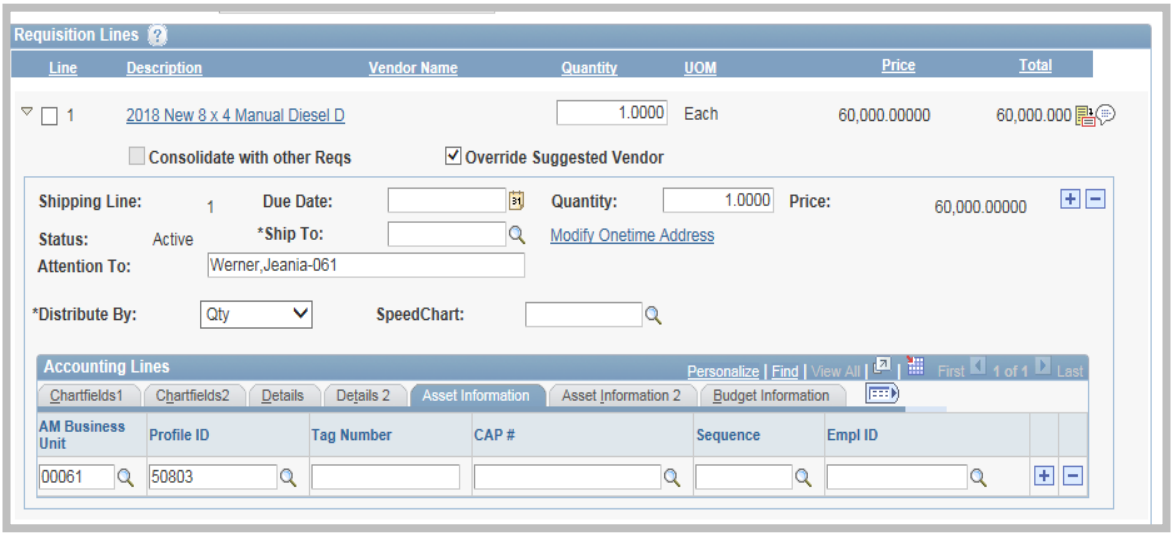


The user should click the Chartfields2 tab to review/edit the remainder of the chartfield information.

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.



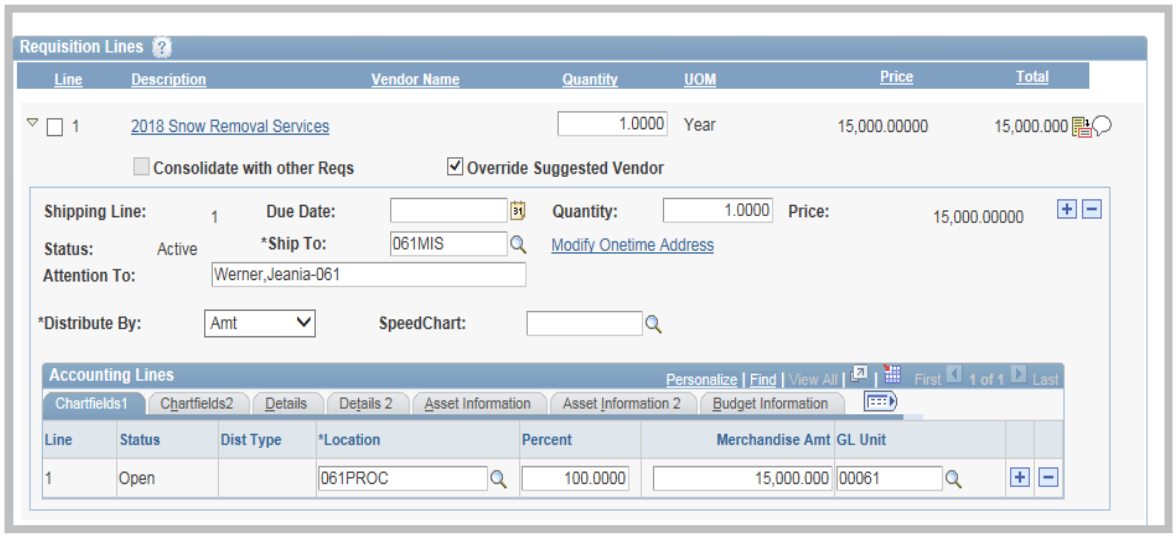
The example above indicates the item has defaulted (the AM Business Unit and Profile ID fields are populated) as an asset based on the dollar amount entered and UNSPSC category chosen on the line. If the user does not want the item to remain an asset, then he/she should remove the information from the 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.

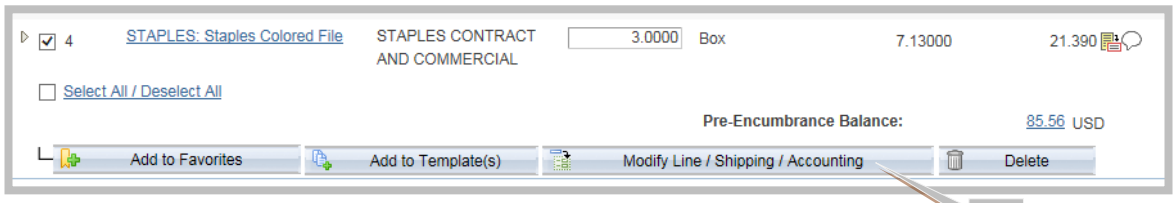
The definition of an Asset Management (AM) asset is a capital asset purchase (or lease) where the total cost is $500 or more (single line item) and the expected life is one year or longer.

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

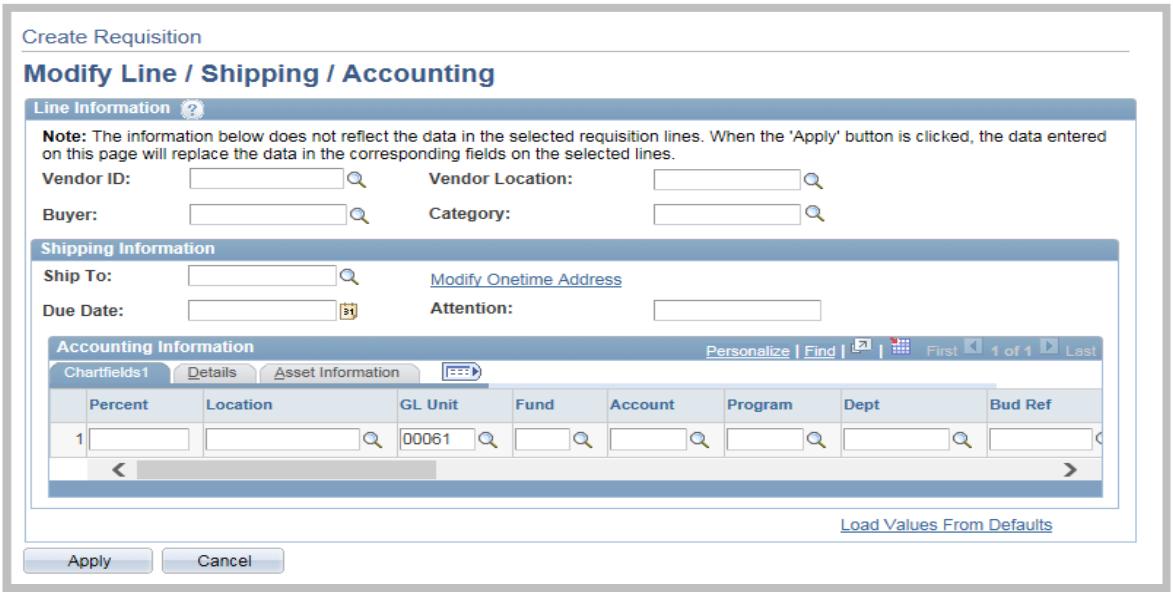
The user should verify whether or not each line of the resulting Purchase Order (PO) for services should be set as amount only. If so, the user should change the Distribute By option from Qty (Quantity) to Amt (Amount) as needed. This will allow the person who issues the PeopleSoft receipt to enter it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





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.

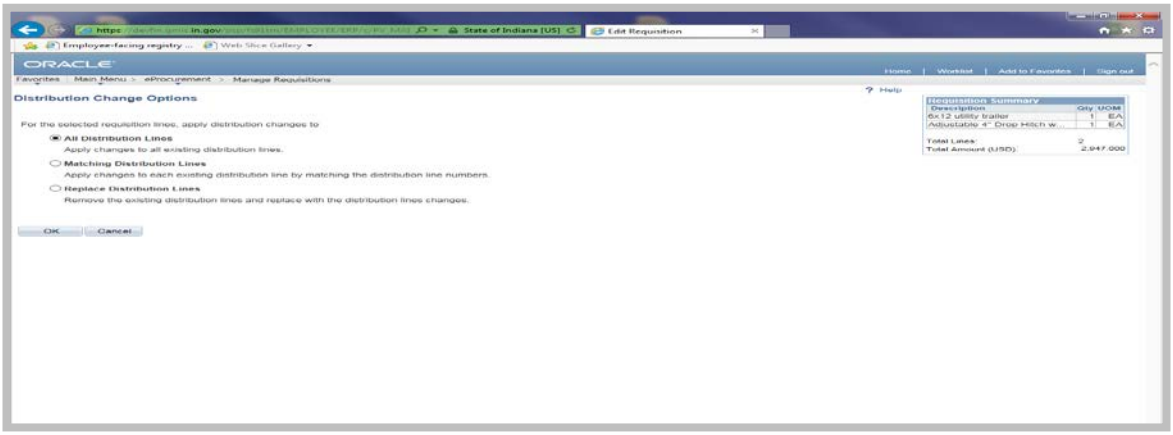


To copy the Chartfields from the Define Requisition step the user should click the Load Values From Defaults link to populate them from the information entered.

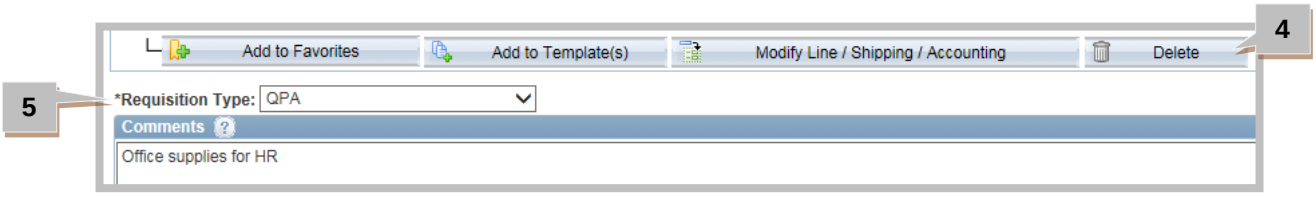
The user can add multiple distribution lines to the Requisition lines by clicking the plus icon at the end of the row and adding/updating the required chartfield information to the additional line(s) added.

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.



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.

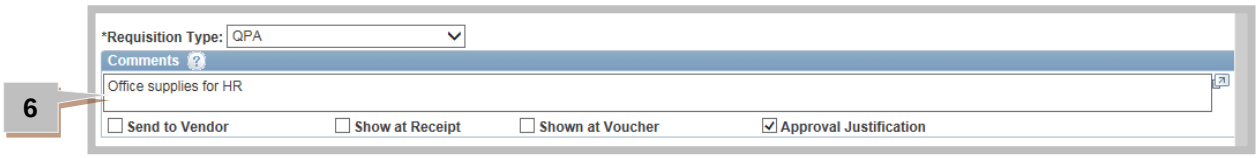
Info Tech Renewal, Procurement Contract Renewal, Prof Serv Contract Renewal, Renewal Equipment Lease Agree, Renewal Equipment Lease Purch, Renewal Maintenance of Equip are contract types that should be used when renewing a contract.

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.

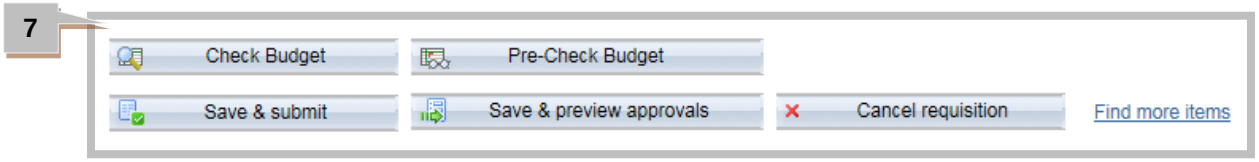
PEN Products to process can be used when purchasing from a PEN Products QPA or the PEN Products website.

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

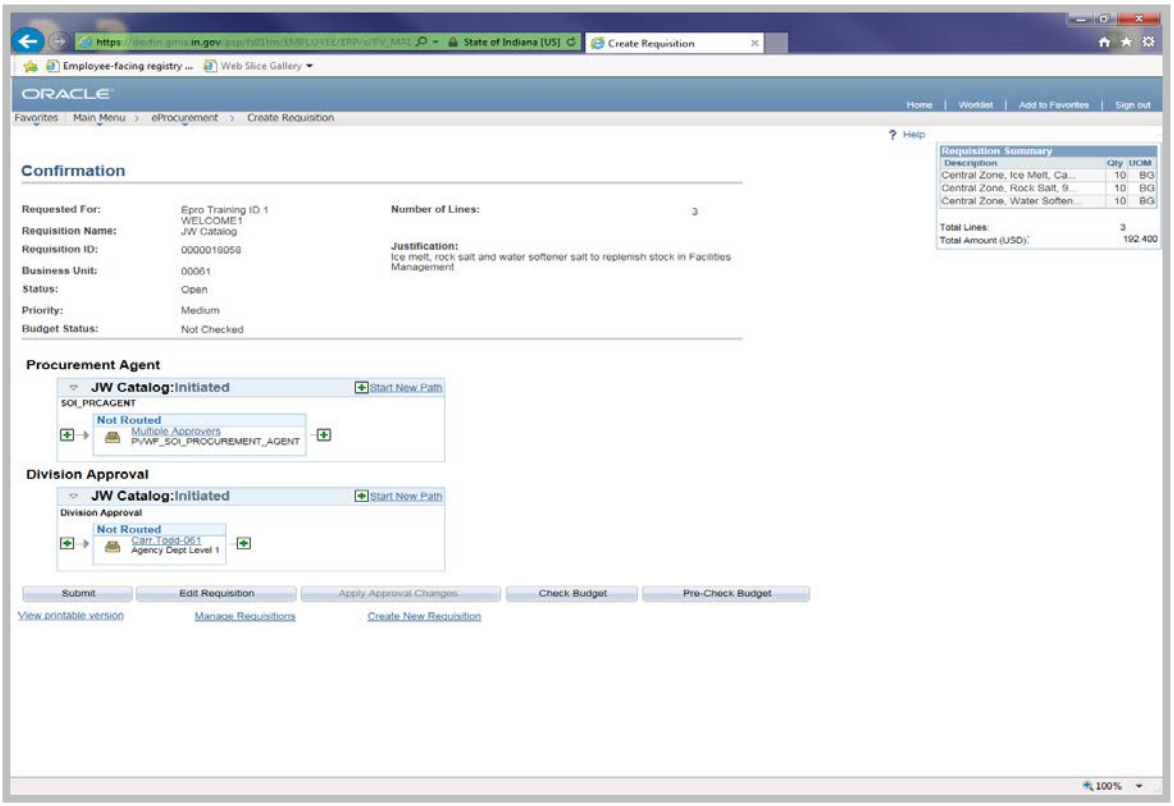
If the user clicks this link, it will take the user back to the Add Items and Services step of the Requisition so additional items or services can be added.

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.



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

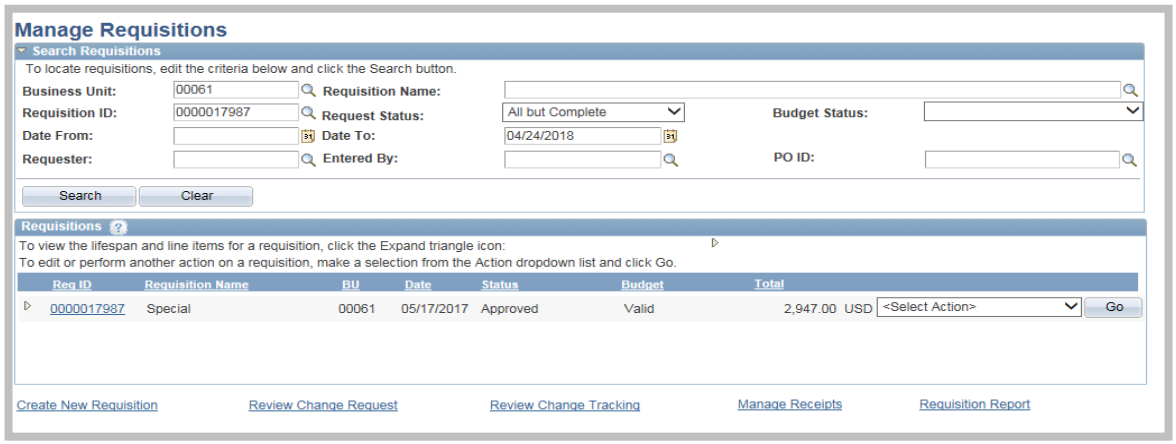
After a Requisition has been saved and/or submitted to the approval workflow process the user can navigate to the Manage Requisitions page to take additional actions and to monitor the status.

Menu Navigation:

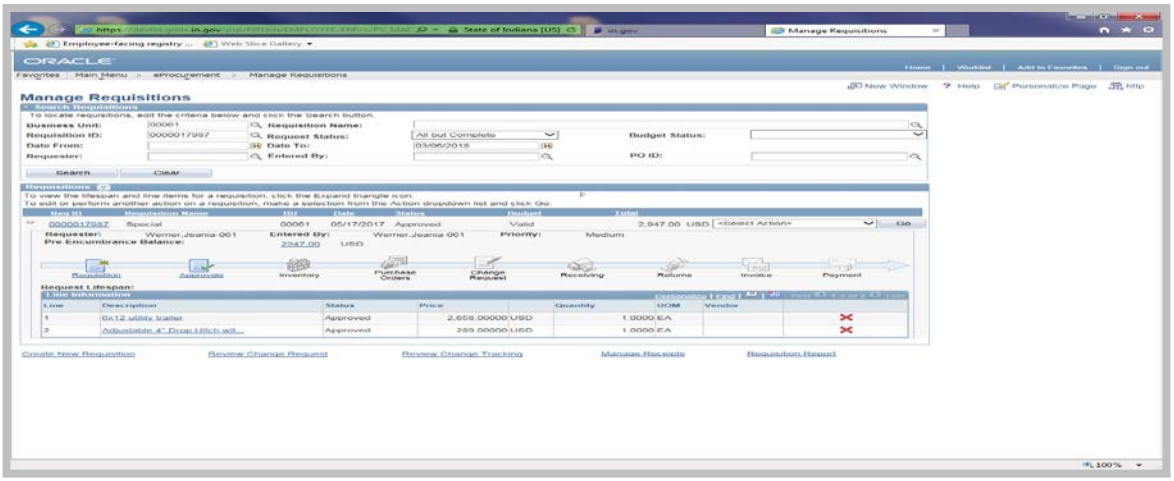
- ePROCUREMENT
  - MANAGE REQUISITIONS

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.

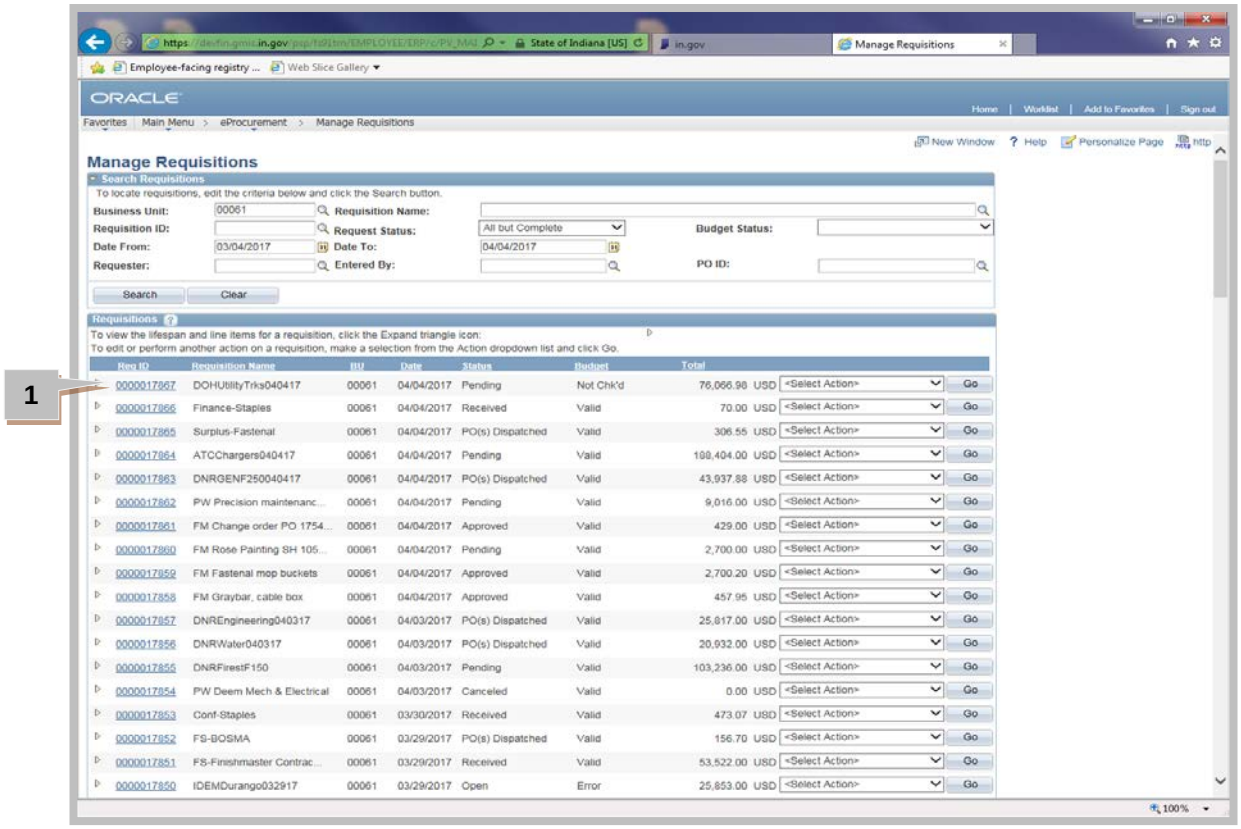
The results retrieved will be displayed under the Requisitions banner and will provide several pieces of information about the Requisition(s) and allows the user to access other processes that can be completed.



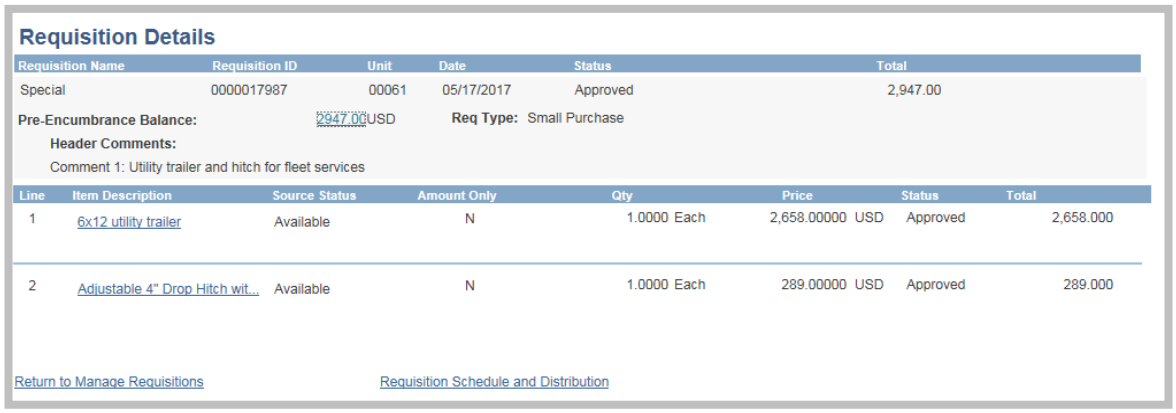
If the user clicks the expand icon to the far left of the Req ID number, it will provide a basic overview of the Requisition header and includes the Request Lifespan (the completed actions will be highlighted) and Line Information. The user can click the icon again to collapse the information.



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: 2947.00USD **Req Type:** Small Purchase

Header Comments:

Comment 1: Utility trailer and hitch for fleet services

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	6x12 utility trailer	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 as 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

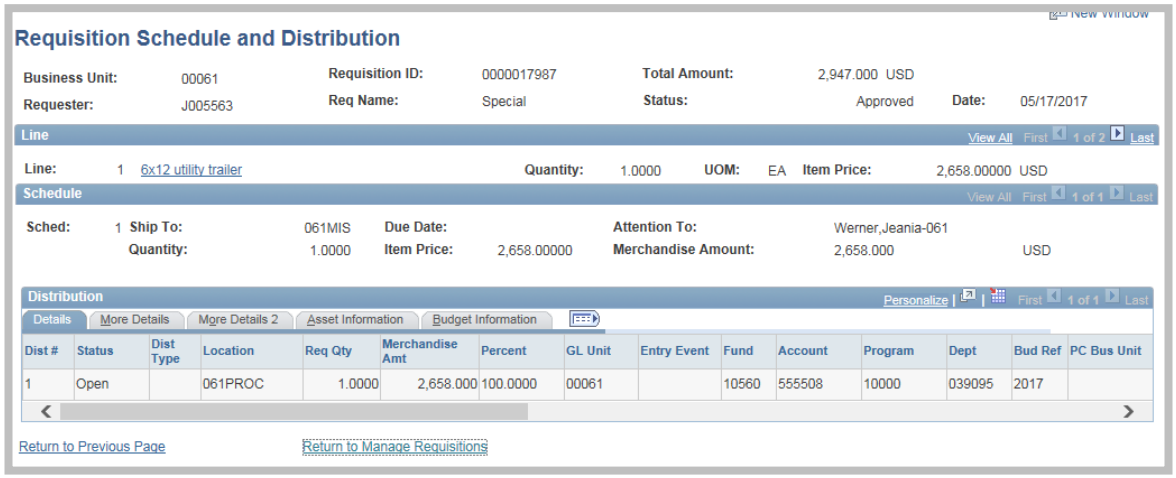
6x12 utility trailer

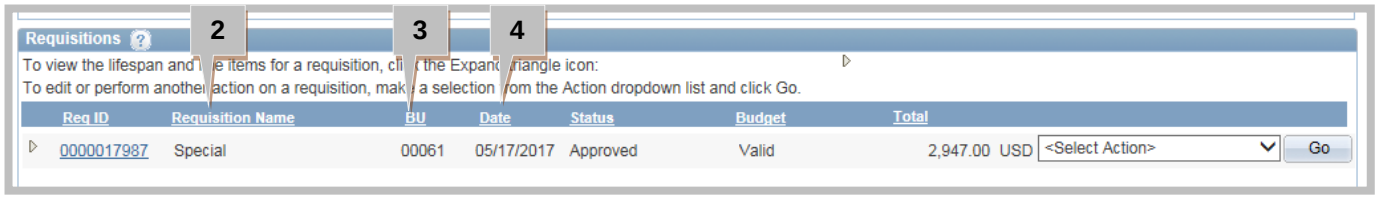
No image for this item

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

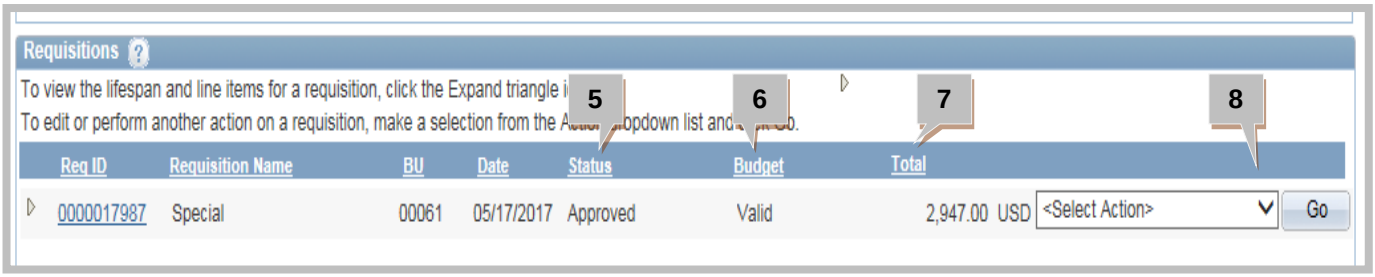




2. Requisition Name
This shows the name entered by the user or the Req ID number if it was not named prior to saving.

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

4. Date
This shows the date the Requisition was created.



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.

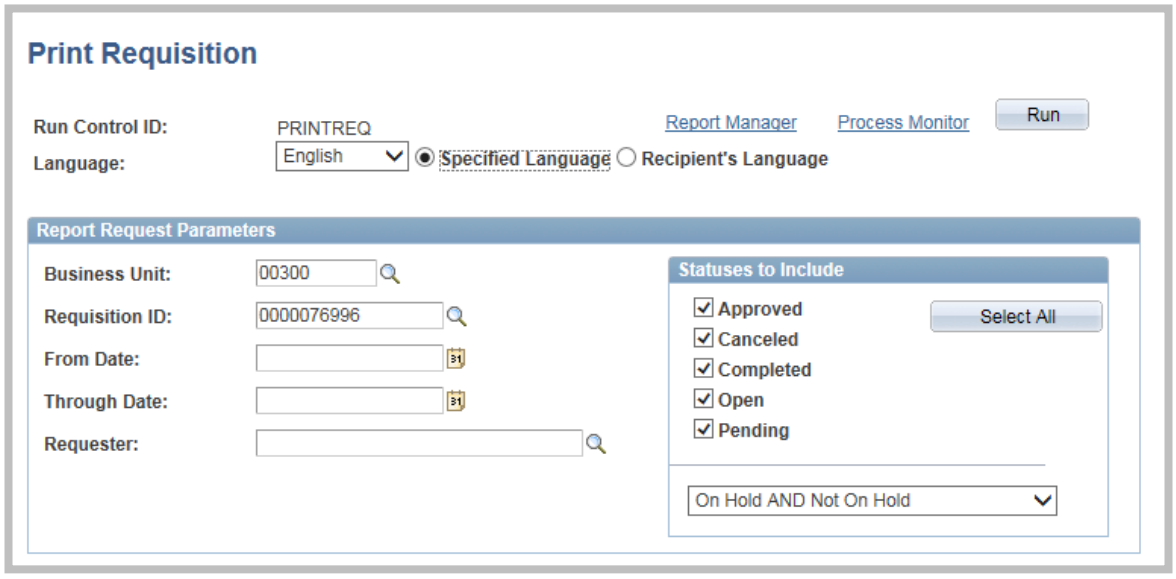
Printing a Requisition

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

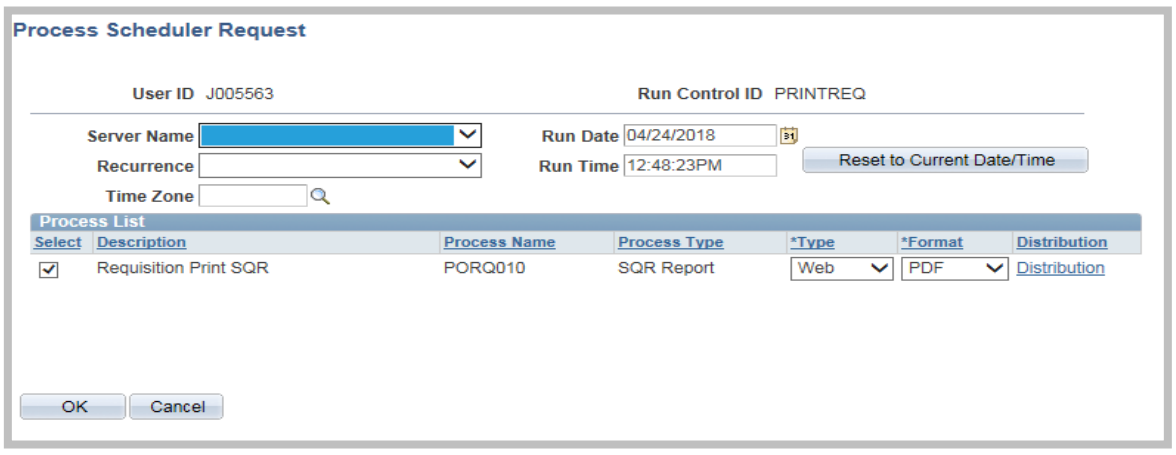
The first option is for the user to locate the specific Requisition and select View Printable Version from the drop down menu to the right before clicking Go. If this process is being run, then the user can skip to the Process Monitor section in the instructions below.

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.

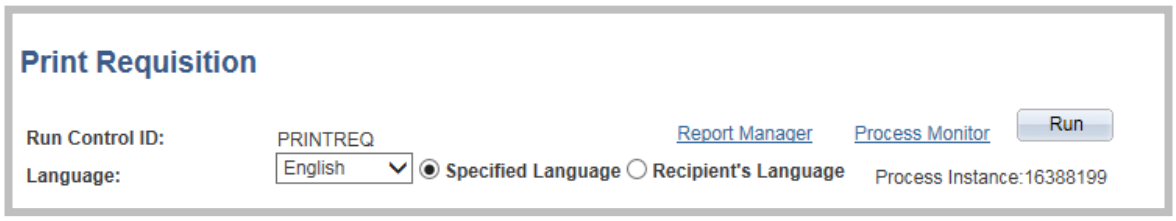
On the Print Requisition page the user must enter the five digit Business Unit and the ten digit Requisition ID in the corresponding fields. The user should verify that in the Statuses to Include area that all five statuses are checked, that the selection underneath is On Hold and Not On Hold and click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



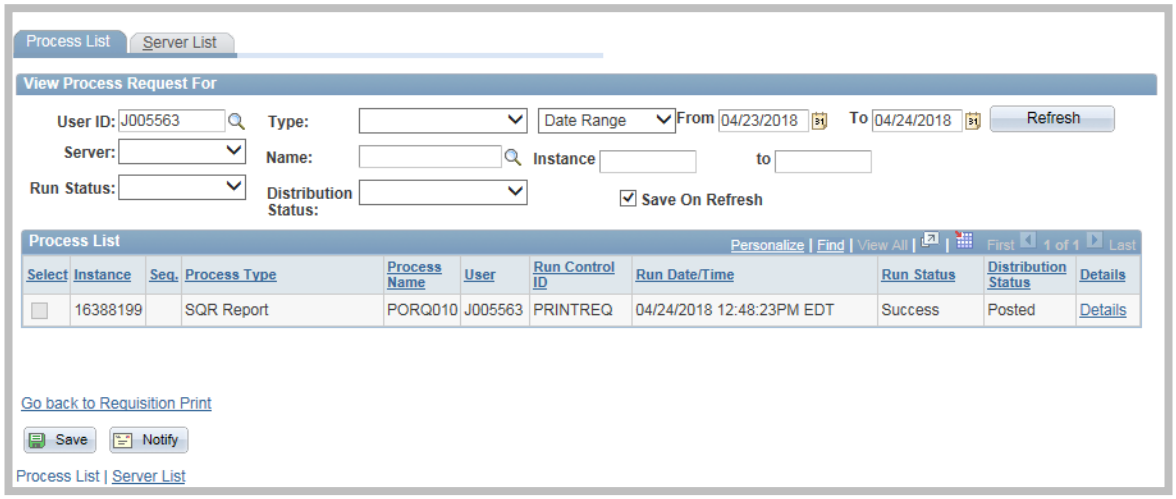
The Process Scheduler Request page is used to select the server on which the process will be run. The user should be sure the Server Name field is blank; this allows the process to run on the first available server. The user must then click OK to run the creation process.



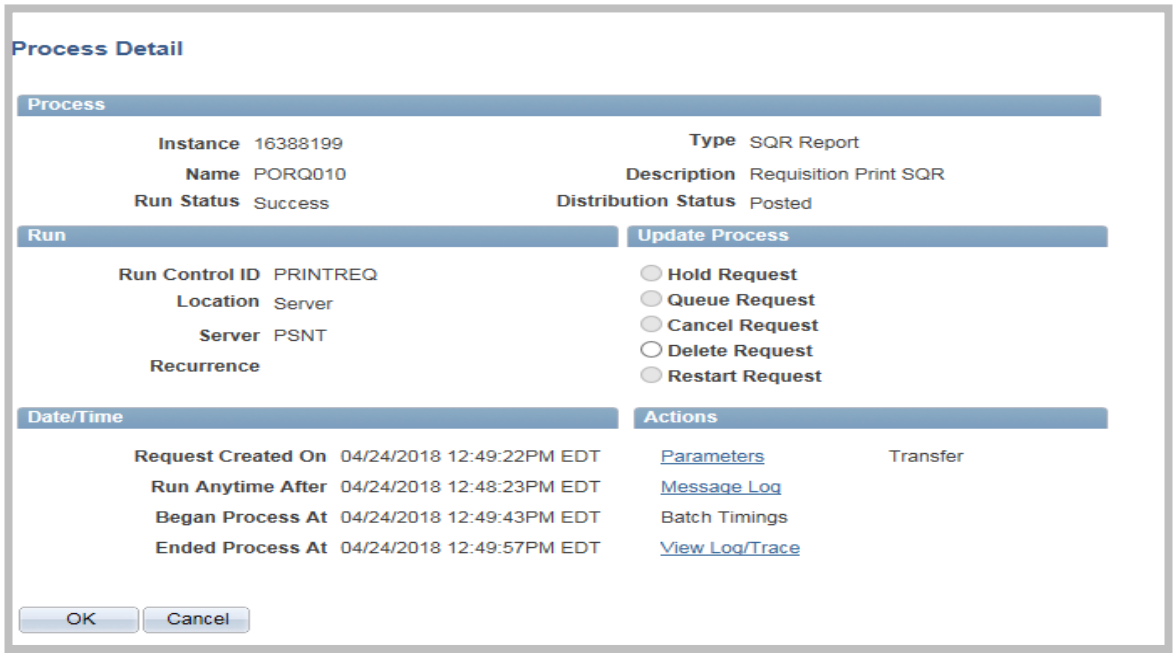
From the Print Requisition page the user must click the Process Monitor link.



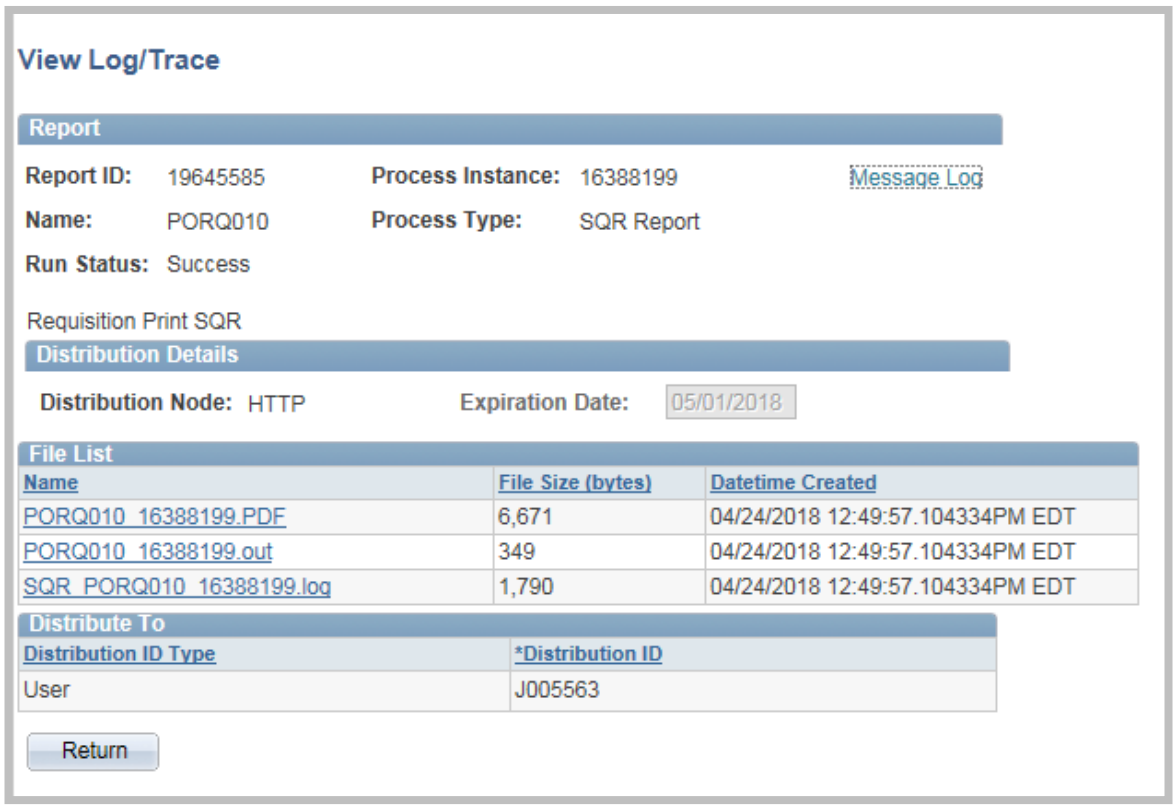
To access the Requisition for printing under the Process List banner the Run Status column must display Success and the Distribution Status column must display Posted on the process just begun. The user will need to click Refresh about every eight seconds until both have become the required status. The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

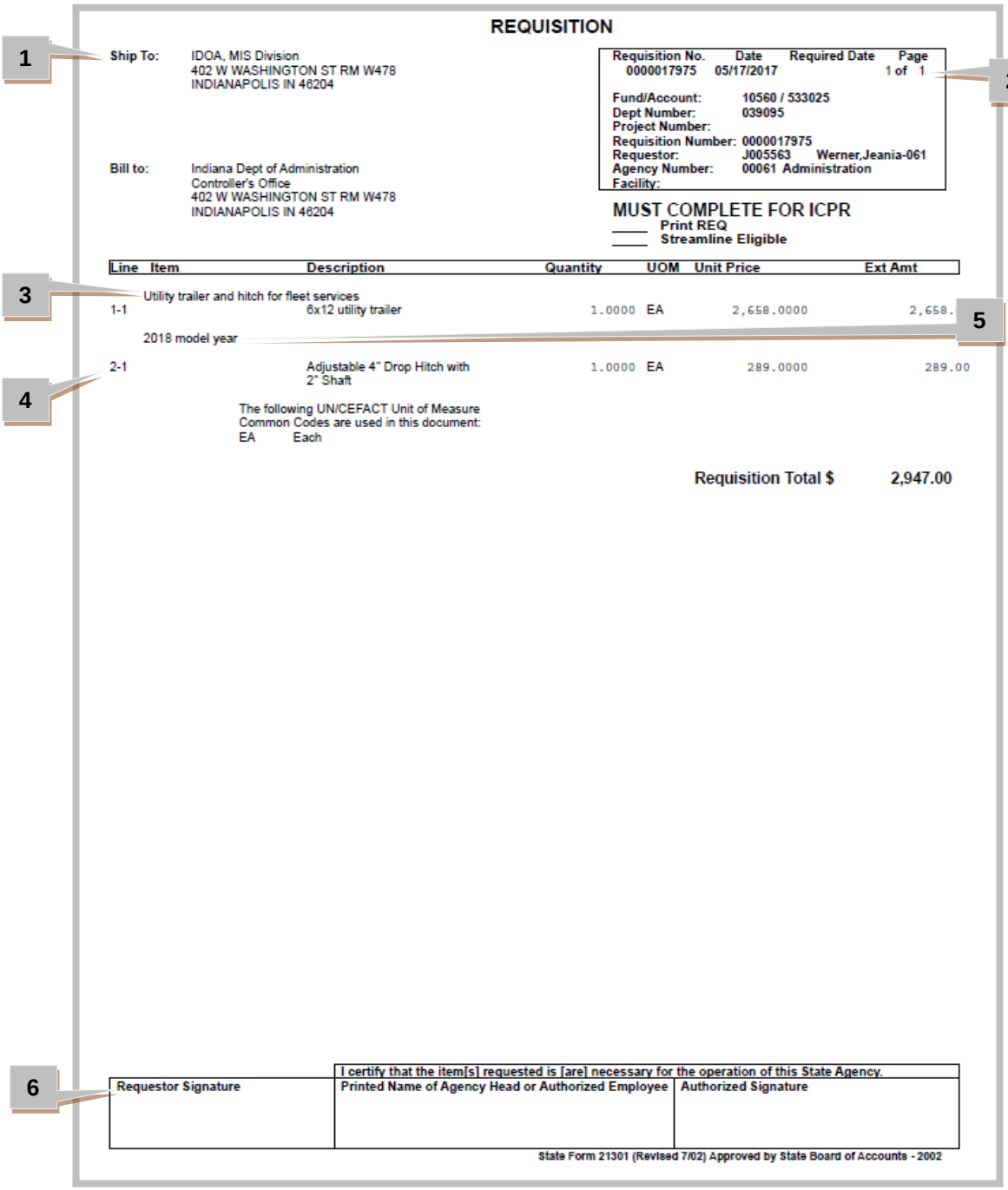


On the Process Detail page the user must click on the View Log/Trace link.



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.





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.

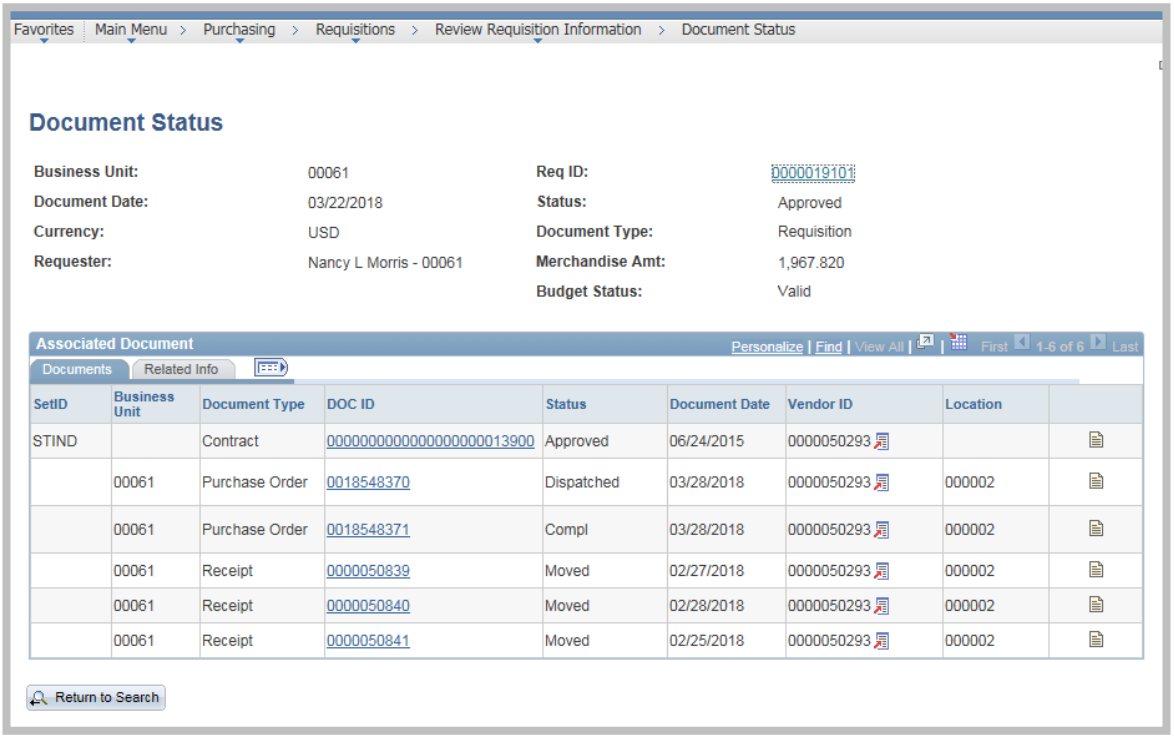
Document Status

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.



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.