



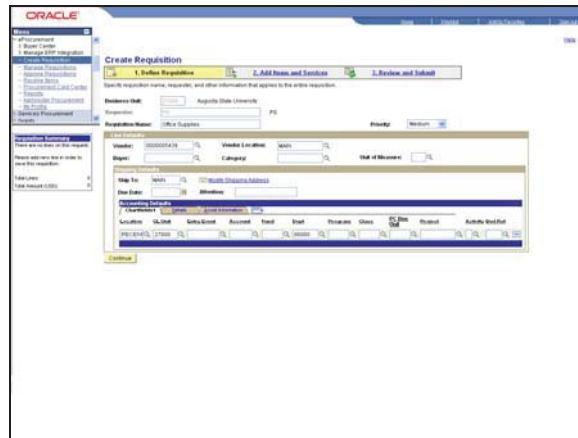



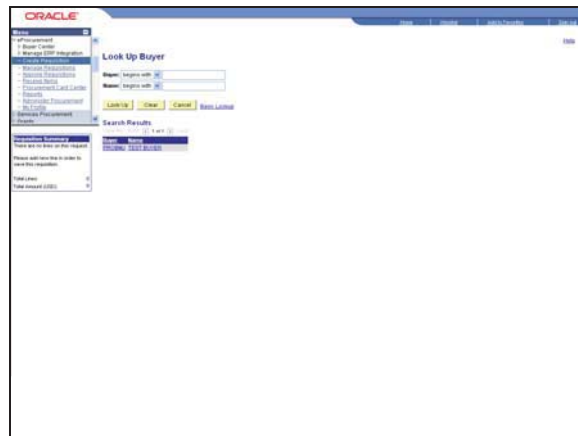
Step	Action
4.	Enter " Office Supplies " in the Requisition Name field.
5.	Click the Expand section button. 
6.	Information entered on the Line Defaults page will be the default for all lines added to the requisition; however, data can be changed on individual lines as needed.
7.	Click the Vendor Lookup button. 



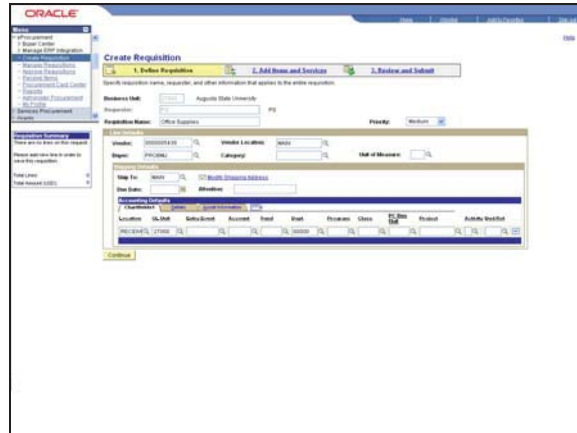
Step	Action
8.	Enter " office " in the Short Vendor Name field.
9.	Click the Find button. 
10.	Click the Vendor ID link. When selected it will be passed back to the requisition defaults. 



Step	Action
11.	Click the Look up Buyer (Alt+5) button. 



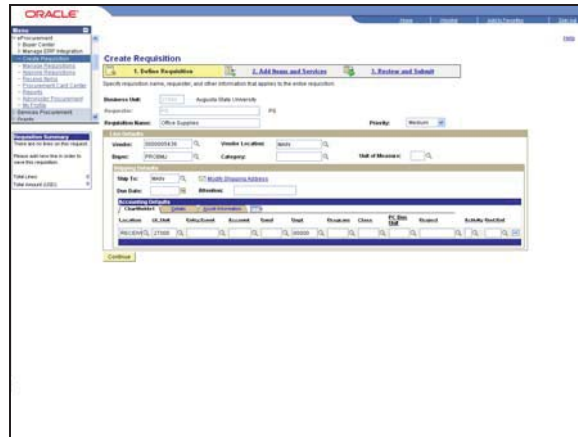
Step	Action
12.	Select the appropriate Buyer from the Search Results table. PROBMJ




Step	Action
13.	Click the Look up Vendor Location (Alt+5) button.





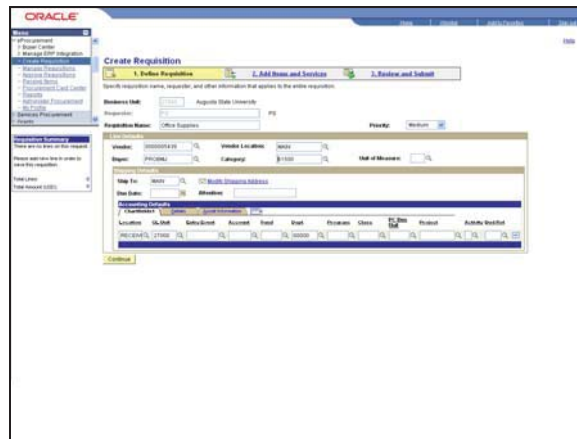
Step	Action
14.	Select the Vendor Location from the Search Results table. MAIN LOCATION




Step	Action
15.	Click the Look up Category (Alt+5) button. 




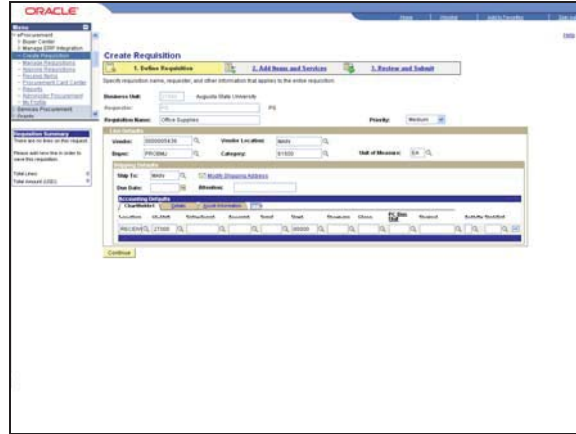
Step	Action
16.	Enter " office " in the Description field.
17.	Click the Look Up button. 
18.	Select the appropriate Category for the requested item from the Search Results table. 




Step	Action
19.	Click the Look up Unit of Measure (Alt+5) button. 




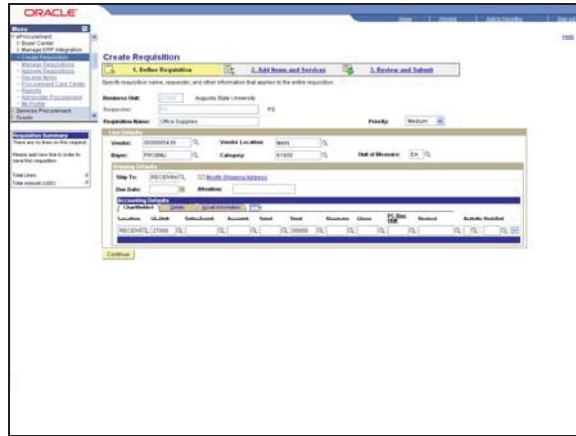
Step	Action
20.	Select the correct unit of measure from the Search Results table. 




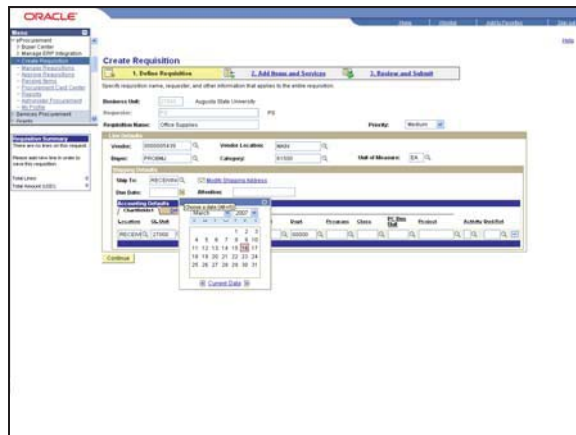
Step	Action
21.	Click the Look up Ship To (Alt+5) button. 




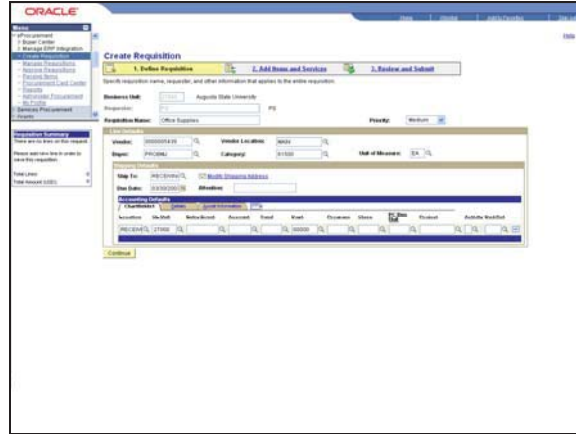
Step	Action
22.	Select the Ship to Location from the Search Results table. 



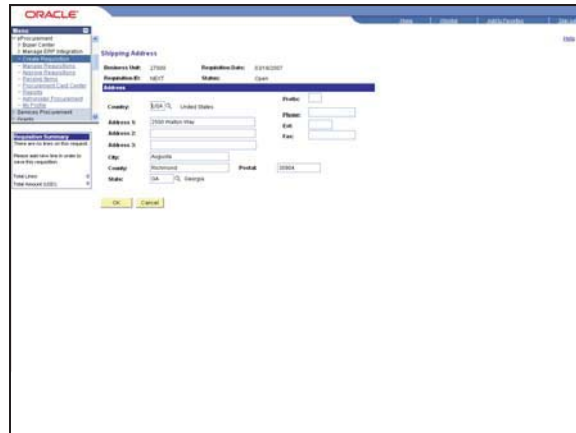
Step	Action
23.	Click the Choose a date (Alt+5) button. 




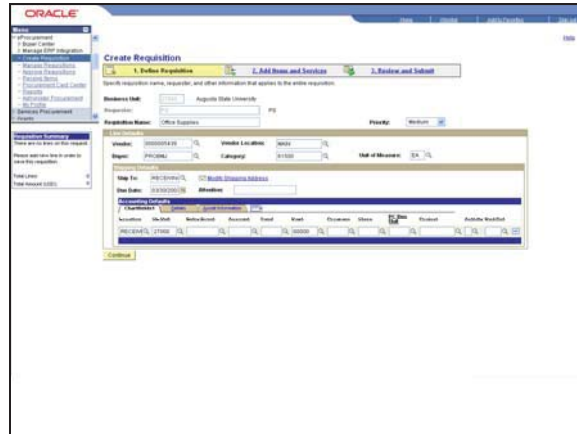
Step	Action
24.	Click the date for which the item is expected to be received by. 



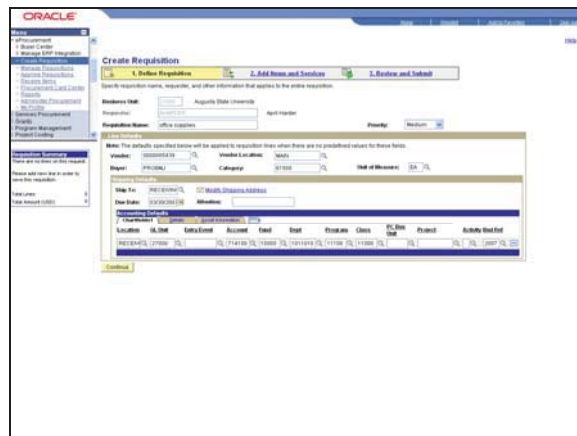
Step	Action
25.	Click the Modify Shipping Address button. 





Step	Action
26.	Information on this page can be modified as needed. For this example, the telephone number will be inserted. Enter the phone number into the Phone field. Enter " 706-555-1212 ".
27.	Click the OK button. 

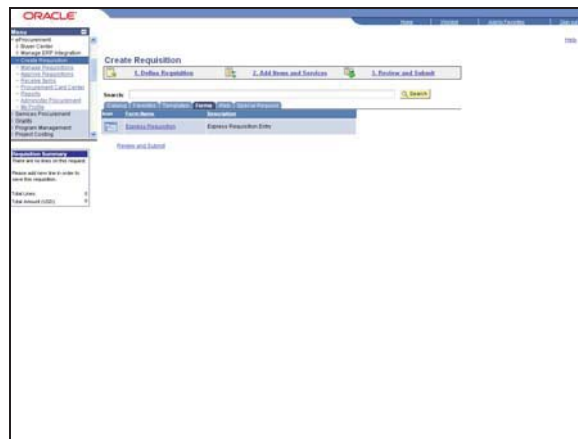



Step	Action
28.	The person to whom delivery should be made can be specified. For this example, type "Alice Smith". Enter " Alice Smith " in the Attention field.
29.	All chartfields can be entered here on the Accounting Defaults Chartfields1 tab. Based on the requester's setup, some chartfields will automatically default. Required chartfields will be Account, Fund, Dept, Program, Class, Project (for Grant budgets), and Budget Reference (budget year).



Step	Action
30.	After chartfields are completed, click on the Details tab. Details

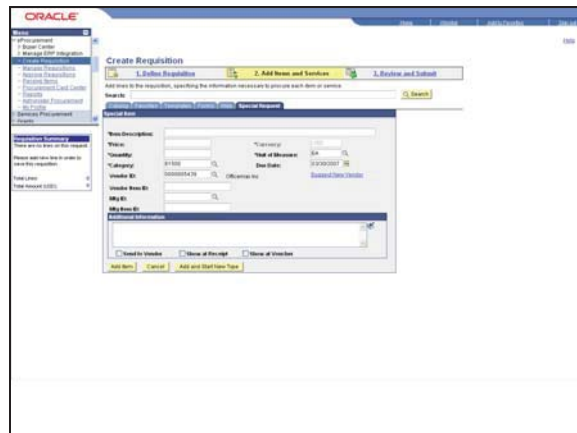
Step	Action
31.	Enter the Budget Date for the appropriate budget period. For example, 7/1/2007 - 6/30/2008 will be budget period 2008.
32.	Enter " 03/22/2007 " in the Budget Date field.
33.	Click the Asset Information tab. 
34.	If the item(s) being requested are Assets, enter a Profile ID here.
35.	Click the 2. Add Items and Services link. 



Step	Action
36.	Click the Special Request link. 

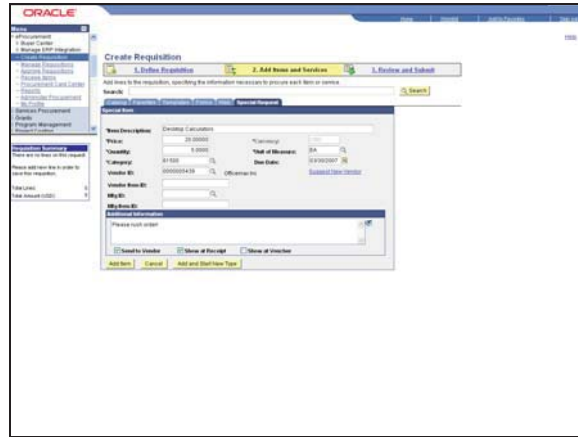


Step	Action
37.	Click the Special Item link. <input type="button" value="Special Item"/>

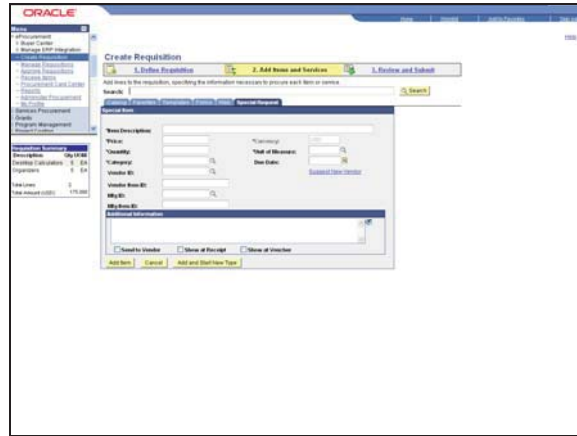





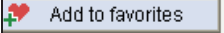


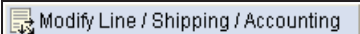
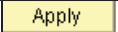
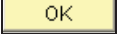

Step	Action
38.	Enter the desired information into the Item Description field. Enter " Desktop Calculators ".
39.	Enter " 20.00 " in the Price field.
40.	Enter " 5 " in the Quantity field.
41.	Enter " Please rush order! " in the Item Description field.
42.	Click the Send to Vendor checkbox if you want the Comments inserted under Additional Information to appear on the purchase order. <input type="checkbox"/>

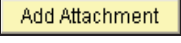
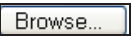
Step	Action
43.	Click the Show at Receipt checkbox for the comments under Additional Information to show at the time the item(s) are received. <input type="checkbox"/>

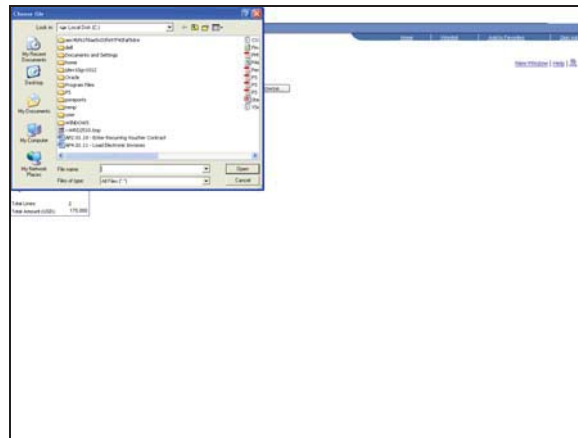


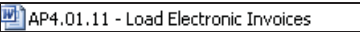
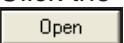
Step	Action
44.	Click the Show at Voucher checkbox if the comments entered under Additional Information need to be seen at the time of vouchering. <input type="checkbox"/>
45.	Note that no lines currently exist on the requisition. The line information is not saved until the Add Item button is selected.
46.	Click the Add Item button. <input type="button" value="Add Item"/>
47.	Once the Add item button is selected, the Requisition Summary section is updated with the number of lines and amount.
48.	If an additional line should be added, simply click the ' Add Item ' button. As you will see in the following screens, a second line was added previously for use in this exercise.

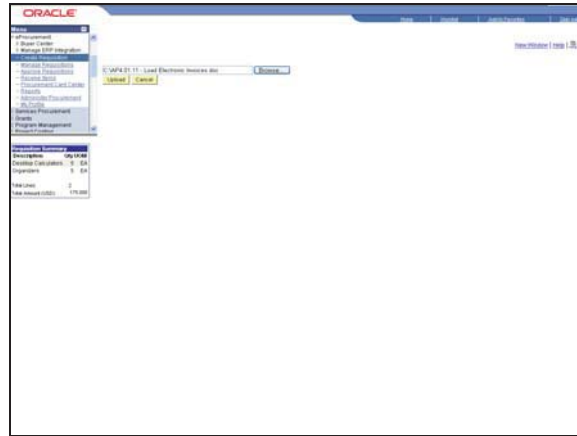


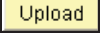
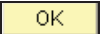

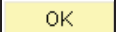
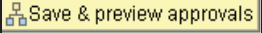

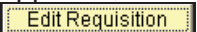
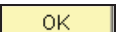
Step	Action
49.	Click the Review and Submit link when you have completed adding lines. 
50.	Select the requisition line. 
51.	Click the Select object. 
52.	Click the Add to favorites button if you want to place the selected lines in your list of commonly ordered items. 
53.	The pop-up window confirms you have successfully added the item or informs you that the item already exists in your list of favorites. Click the Close button. 
54.	Click the Expand Section button to view the line and distribution information for the line. 
55.	Click the Modify Line / Shipping / Accounting button to change a field on more than one line. 
56.	Enter " MAIN " in the field.
57.	
58.	Click the OK button to make the change to all lines. 
59.	Click the Comments button to view the line comments page. 
60.	Comments and a file attachment will be added to this requisition line.

Step	Action
61.	Enter " SEE ATTACHED " in the Comments field. Press [Enter] to continue .
62.	Click the Send to Vendor checkbox if you want the comment to print on the PO. <input type="checkbox"/>
63.	Click the Add Attachment button. 
64.	Click the Browse button. 



Step	Action
65.	Search and select the file you want to upload into the system. 
66.	Click the Open button.  or Press [Alt+O] .



Step	Action
67.	Click the Upload button. 
68.	If successful, the file will be uploaded into the system and appear here.
69.	Click the OK button. 
70.	Click the Check Budget button if you are ready to pre encumber the funds. The business process will vary among institutions on whether they want to pre encumber funds before or after approval. 
71.	Click the OK button. 
72.	The Budget Checking Status will change to Valid if the requisition successfully created a pre-encumbrance.
73.	Click the Save & preview approvals button when you are done updating the requisition and want to preview the approval routing. 
74.	The confirmation page allows you to review who is in the approval path for this requisition based on the chartfields. This field will be updated with the appropriate approver's user id.
75.	Click the Submit button when you are ready to send an approval notification to the approvers. 
76.	If you need to make changes to the requisition after it has been submitted for approval, but before it is approved, click the Edit Requisition button. 
77.	Click the OK button. 

Step	Action
78.	The Edit Requisition page can be used to make changes to the requisition.
79.	<p>Congratulations. You have just completed the Creating a Requisition topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - The three stages of a requisition are defining the requisition, adding items and services, and reviewing and submitting. - Line defaults apply to every line in the requisition. However, individual lines can be edited. - Required chartfields for a requisition are Account, Fund, Dept, Program, Class, Project (for Grant budgets), and Budget Reference (budget year). - If the requisition is for an asset, a Profile ID must be designated. - Requisition comments can be designated on the Special Request tab to be viewable by the vendor, displayed on the receipt, and displayed on the voucher. - The Requisition Summary indicates the number of lines on the requisition. - Frequently ordered items can be placed into a common list using the Add to Favorites feature. - The Check Budget button causes the requisition amount to pre-encumbered. - Once the requisition is confirmed, the Confirmation page displays a link containing the requisition approval path. - Requisitions can be edited after they have been submitted but before they have been approved. <p>End of Procedure.</p>

EP.020.530 - Adding a Travel Requisition for Non-Employee

This topic demonstrates how to create a travel requisition for a non-employee using the eProcurement module. When adding a travel requisition for a non-employee, use the 650100 account, which is dedicated for this kind of expense.

For employees, all travel should be handled through the Expenses module.

Topic Objectives:

Upon completion of this topic, you will be able to:

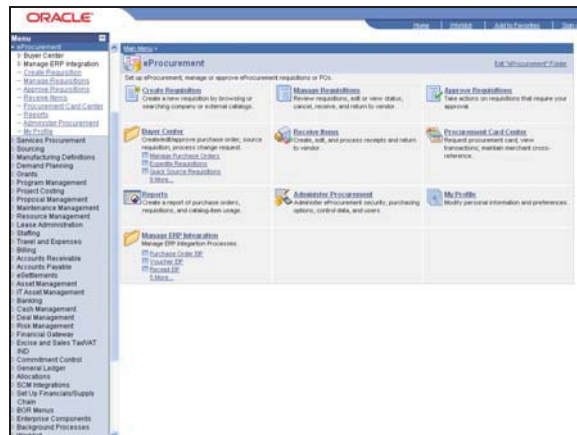
- Identify the Request Type when adding a Travel Requisition for a non-employee.
- Identify the account to be used when adding a Travel Requisition for a non-employee.
- Define how travel requests are added for employees.
- Add a Travel Requisition for a non-employee.

Procedure

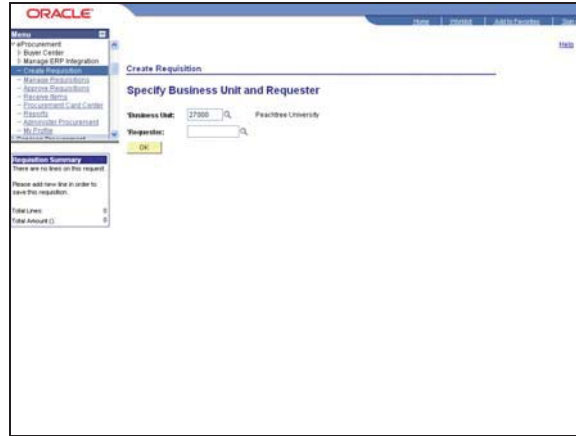
For this topic, imagine you need to create a Travel Requisition to cover the expenses for a Dean position candidate. Let's see how this is done.

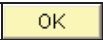


Step	Action
1.	Click the eProcurement link.



Step	Action
2.	Click the Create Requisition link. Create Requisition Manage Requisitions Approve Requisitions



Step	Action
3.	Enter " AHARDER " in the Requester field.
4.	Click the OK button. 

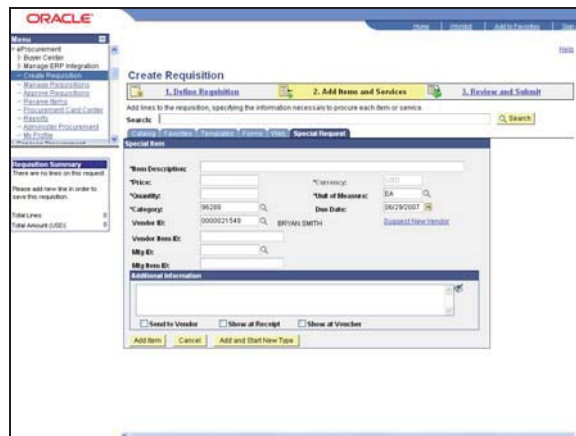


Step	Action
5.	Click the 1. Define Requisition link. 1. Define Requisition



Step	Action
15.	Click the Special Request tab. Special Request

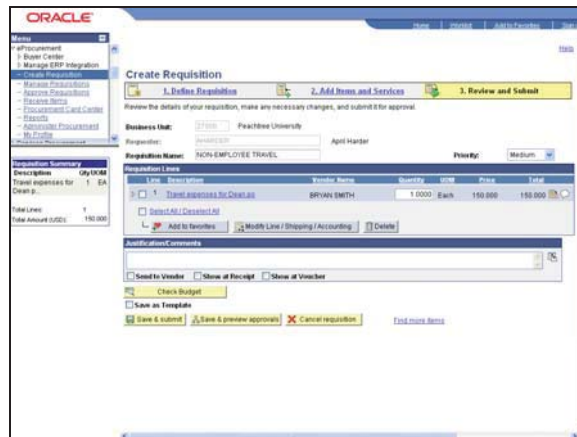



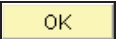
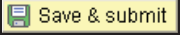
Step	Action
16.	Click the Special Item link. Special Item



Step	Action
17.	Enter " Travel expenses for Dean position candidate " in the Item Description field.
18.	Enter " 150.00 " in the Price field.

Step	Action
19.	Enter "1" in the Quantity field.
20.	Click the Add Item button. 
21.	Click the 3. Review and Submit link. 



Step	Action
22.	Click the Check Budget button. 
23.	Click the OK button. 
24.	Click the Save & submit button. 
25.	This is the confirmation of the Travel Requisition for a Non-Employee.
26.	<p>Congratulations. You have just completed the Adding a Travel Requisition for a Non-Employee topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - When adding a Travel Requisition for a non-employee, use the Special Item as the Special Request Type. - When adding a Travel Requisition for a non-employee, use account number 650100. - Travel requisitions for employees are created in the Expenses module. <p>End of Procedure.</p>

EP.020.540 - Managing Requisitions

This topic demonstrates how to manage requisitions. From the Manage Requisitions page, you can access other pages to review requisition details, edit or cancel requisitions, or create change requests. You can search for requisitions through a variety of means, such as requisition IDs, dates, requester, status, and who entered the requisition.

You can gather a variety of information regarding requisitions from the Manage Requisitions page. You can view the requisition life span, line items, details, source status, and distribution information. You can also perform additional actions on a requisition. These actions differ depending on the status of the requisition.

Topic Objectives:

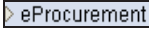
Upon completion of this topic, you will be able to:

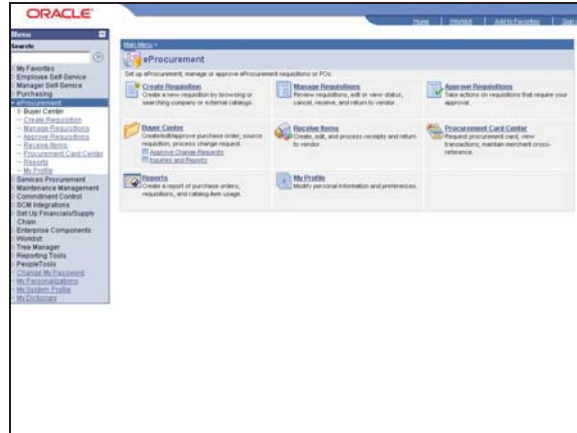
- Define the different statuses for a requisition.
- List the different ways you can search for a requisition.
- Identify how to view the life span and line items for a requisition.
- Define the different sourcing statuses for requisition lines.
- Identify where you can view line details, schedules and distribution information.
- Identify what the Schedule section displays on the Requisition Schedule and Distribution page.
- Define the different distribution statuses.

Procedure

For this topic, imagine that you have created a requisition for some office supplies. You need to check the status of the requisition. The requisition ID is 0000000049. You also want to check the distribution details for the 50 yellow paper pads on the requisition. Let's see how this is done.

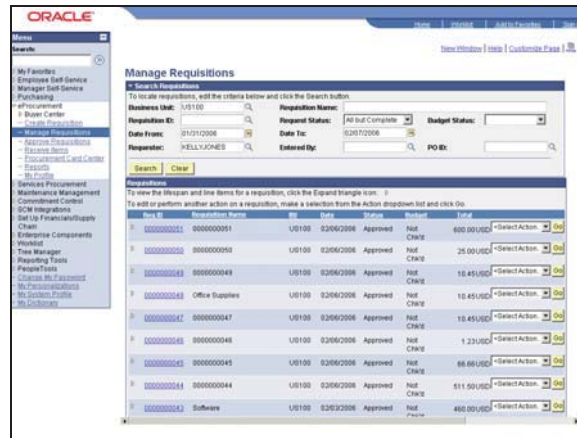



Step	Action
1.	Click the eProcurement link. 



Step	Action
2.	Click the Manage Requisitions link.
3.	After a requisition is saved, you can use the Manage Requisitions page to view a list of requisitions in various statuses. From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, or create change requests.
4.	Use the Search Requisitions section to search for specific POs. You can search by requisition ID, dates, requester, who entered the PO, and by PO number and status.
5.	These are the requisition statuses for which you can search and which appear in the Status column. <ul style="list-style-type: none"> • Approved: The requisition is approved and can become a PO. • Canceled: The requisition was entered and saved but was canceled. A canceled requisition can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently. • Complete: After the requisition is dispatched on a PO, the goods are received and the vendor is paid. A background process identifies the requisition status as Complete. Canceled requisitions and those that are fulfilled by inventory stock are also identified as Complete. • Denied: The requisition is denied in the approval process. • Open: The requisition has been entered and saved but not yet submitted, or the receipt has been entered and saved but might have errors.

Step	Action
6.	<p>More requisition statuses:</p> <ul style="list-style-type: none"> • PO(s) Created: The requisition has been placed on a PO. • PO(s) Dispatched: The requisition has been placed on a PO, and the PO has been dispatched to the vendor. • Pending: The requisition has been submitted and is awaiting approval. • Received: The requisition has been placed on a PO. The PO has been dispatched to the vendor, and the goods have been partially or fully received. • Searched: Retrieves the last search that you performed in the Requisition Name field. If a value is in the Requisition Name field, it is used in the search.



Step	Action
7.	<p>Click the Expand Section button to view the life span and line items for a requisition.</p> <p>Click the Expand Section button.</p> 
8.	<p>Click a listed ID to view details of the requisition.</p> <p>Click the 000000049 link.</p> <p>000000049</p>
9.	<p>Use the Requisition Details page to view details about individual requisitions. The PO Information header bar appears only if a purchase order was created for the requisition.</p>
10.	<p>Click the Item Description link to view an item's description. You can also access the item's detail document.</p>

Step	Action
11.	<p>Use the Source Status field to view the stage of the requisition line in the sourcing process. Values include:</p> <ul style="list-style-type: none"> • Not Sourced • Available: The requisition line has not yet been placed on a PO or inventory stock request. • In Process: A sourcing process is running on this requisition line, or there is an error in creating a PO. • Sourcing Complete: The requisition line has been sourced to an inventory stock request or a PO.

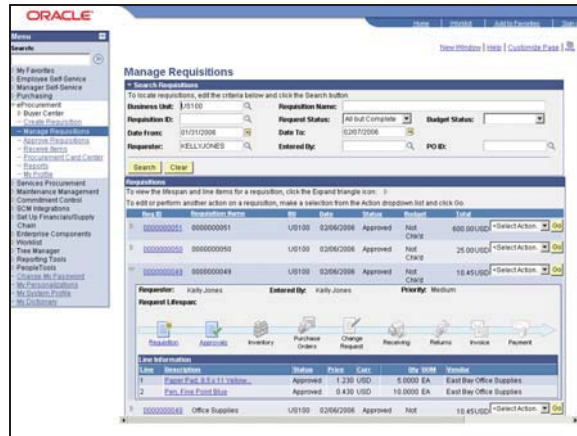


Step	Action
12.	<p>Click the Requisition Schedule and Distribution link to access the Requisition Schedule and Distribution page where you can view line details, schedules, and distribution information. Click the Requisition Schedule and Distribution link.</p> <p>Requisition Schedule and Distribution</p>
13.	<p>The Requisition Schedule and Distribution page includes three sections.</p> <p>The Line section contains all of the line items on a requisition. To view the item's description, click the item name.</p>
14.	<p>The Schedule section displays shipping information for the item, such as where the item is being shipped, when it's due, the amount, and cost of the item.</p>
15.	<p>Dist # displays the number the system assigns to this distribution. The system uses this numbering to distinguishes between multiple distributions for a single requisition line.</p>

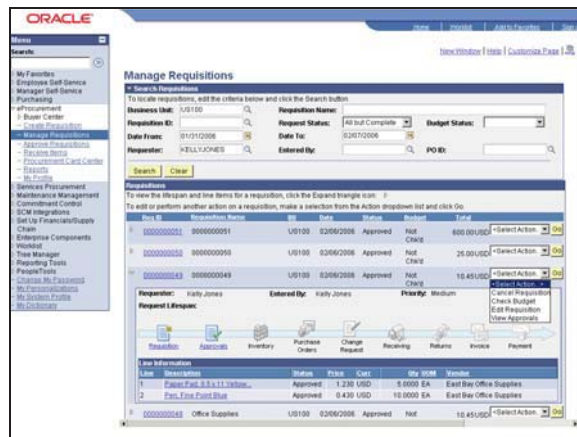
Step	Action
16.	Distribution statuses include: <ul style="list-style-type: none"> • Open: The distribution line is open. • Complete: The distribution line is closed. • Processed: The distribution line has been processed and is unavailable for sourcing. • Canceled: The distribution has been canceled.
17.	Dist Type displays the method by which the system allocates or charges an expense account distribution. Values include: <ul style="list-style-type: none"> • Amt: The sum of all distribution amounts must equal the schedule amount (merchandise amount). Inventory items cannot be distributed by amount. • Qty: The sum of all distribution quantities must equal the schedule quantity.
18.	Use the More Details tab to view and update projects and activities.
19.	Use the More Details2 tab to view information such as Stat Code, Open Amt, Open Quantity, Base Amt, and Exch Rt.
20.	Use the Asset Information tab to view asset information.



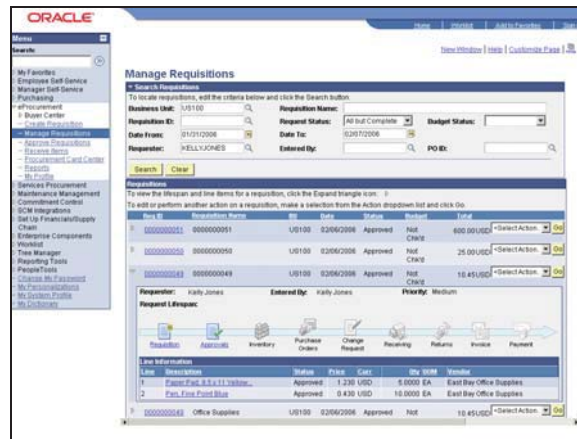
Step	Action
21.	Click the Return to Manage Requisitions link. Return to Manage Requisitions



Step	Action
22.	<p>You can perform additional actions on a requisition. Select an option and click the Go button to perform the action.</p> <p>The options that appear for a requisition differ depending on the requisition's status. For example, you cannot cancel a requisition for which a purchase order is created.</p> <p>Click the Select Action list.</p> <p><Select Action...></p>



Step	Action
23.	<p>Review the available actions.</p> <p>Click the Select Action list.</p> <p><Select Action...></p>



Step	Action
24.	Click the vertical scrollbar.
25.	Click the Create New Requisition link to access the Create Requisition page where you can add another requisition.
26.	Click the Inquire Change Request link to access the Change Request List for page where you can view and process change requests.
27.	Click the Inquire Receipts link to access the Receipts For page where you can view and maintain receipts.
28.	Click the Requisition Report link to access the Requisition to PO XREF page where you can define parameters for creating the Requisition to PO XREF report (POY1100).

Step	Action
29.	<p>Congratulations. You have just completed the Managing Requisitions topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - From the Manage Requisitions page, you can access other pages to review requisition details, edit or cancel requisitions, or create change requests. - You can search for requisitions by using a range of details, such as requisition ID, dates, requester, status, etc. - There are nine different statuses for requisitions: Approved, Canceled, Complete, Denied, Open, PO Created, PO Dispatched, Pending, and Received. - The life span and line items for a requisition can be found by clicking the Expand Section button next the requisition ID on the Manage Requisitions page. - There are four different Source Statuses for a requisition line: Not Sourced, Available, In Process, and Sourcing Complete. - You can view line details, schedules, and distribution information for a requisition on the Requisition Schedule and Distribution page. - On the Requisition Schedule and Distribution page, the Schedule section displays shipping information for the item. - There are four different Distribution statuses for requisition line: Open, Complete, Processed, and Canceled. <p>End of Procedure.</p>

EP.020.550 - Editing, Saving, and Submitting an ePro Req

This topic demonstrates how to edit, save, and submit an existing requisition. Some examples of requisition edits will include entering Line Comments, changing the quantity of item, and changing the distribution information. You will have the opportunity to edit Requisitions until they are approved.

Topic Objectives:


Upon completion of this topic, you will be able to:

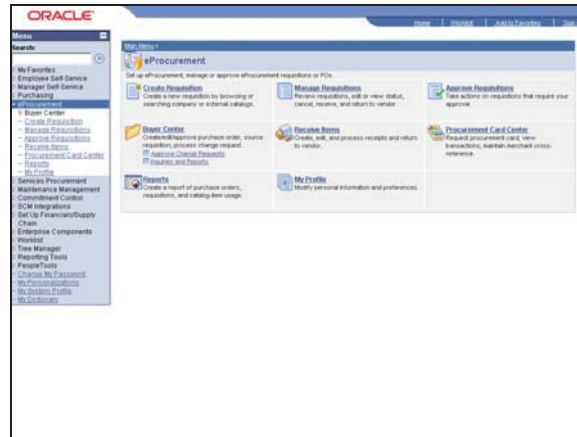
- List the functions you can perform by going through the Manage Requisitions page.
- List the activities that can be performed on the Edit Requisition page.
- Identify when the Edit Requisition page is available.
- Edit, save and submit a requisition.

Procedure

For this topic, imagine you need to edit a requisition by adding a line comment and modifying the shipping information. The Requisition ID is 0000000044. Let's see how this is done.

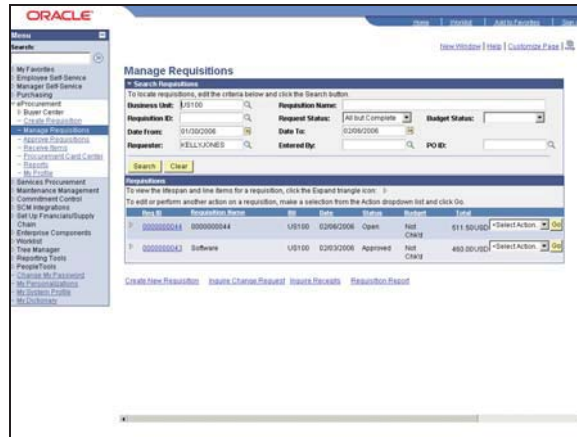


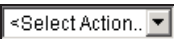
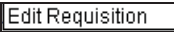

Step	Action
1.	Begin by navigating to the Manage Requisitions page. Click the eProcurement link. 

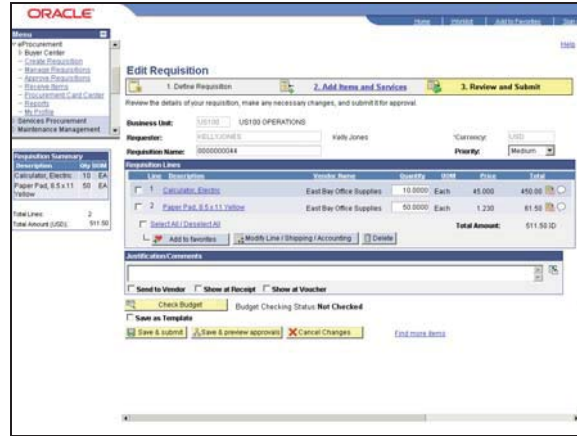


Step	Action
2.	Click the Manage Requisitions link.
3.	Use the Manage Requisitions page to view a list of requisitions in various statuses. From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, and create change requests.
4.	You can search for specific requisitions by specifying by requisition ID, dates, requester, who entered the PO, and by PO number and status.

Step	Action
5.	Click the Req ID link to access the Requisition Details page where you can view details about individual requisitions. The PO Information header bar appears only if a purchase order was created for the requisition.




Step	Action
6.	Click the Action list. 
7.	Click the Edit Requisition list item. 
8.	Click the Go button. 
9.	Use the Edit Requisition page to perform activities, such as adding comments and modifying shipping information. This page is accessible only for open requisitions.

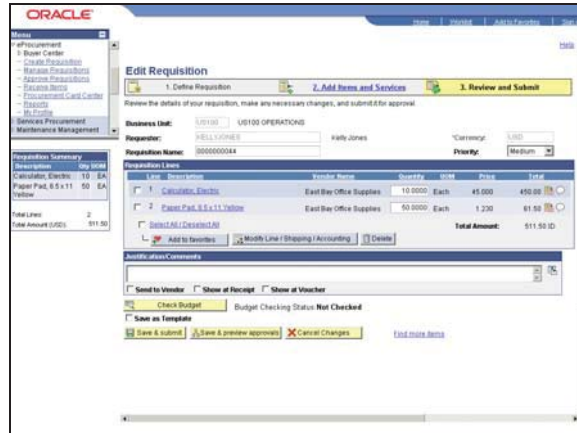



Step	Action
10.	First, you need to add comments about the shipment of calculators. Click the Comments button. <input type="checkbox"/>

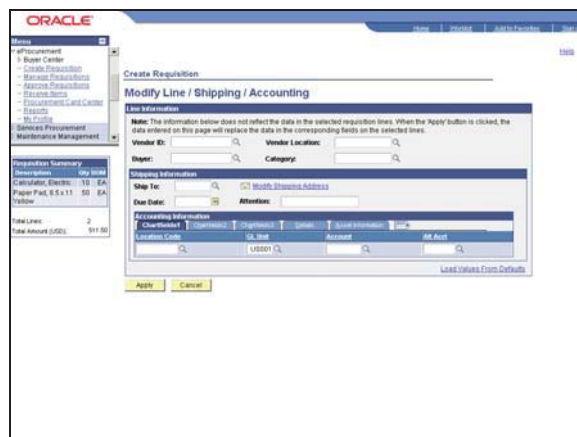


Step	Action
11.	You use the Line Comments page to record comments about a selected item. Click in the Comment field.
12.	Enter " The calculators should be shipped within two days of the requisition. " in the Comment field.
13.	Select the Send Comment to Vendor check box to display the comment on the copy of the PO that is sent to the vendor. Click the Send to Vendor checkbox. <input type="checkbox"/> Send to Vendor

Step	Action
14.	Click the OK button. 



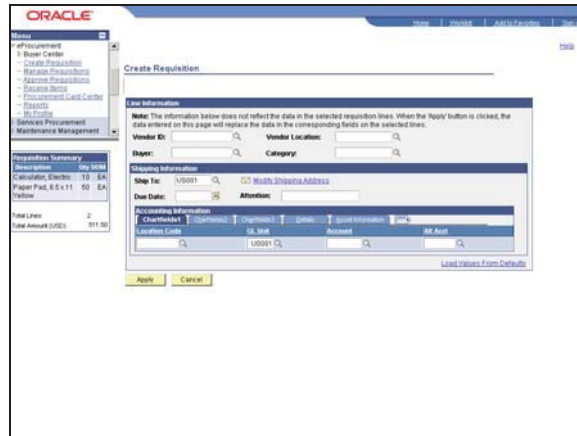
Step	Action
15.	Next, you need to enter shipping information for an item. Click the Select checkbox. <input type="checkbox"/>
16.	Click the Modify Line / Shipping / Accounting button. 
17.	Use the Modify Line/Shipping/Accounting page to change shipping instructions and accounting details for requisition lines.



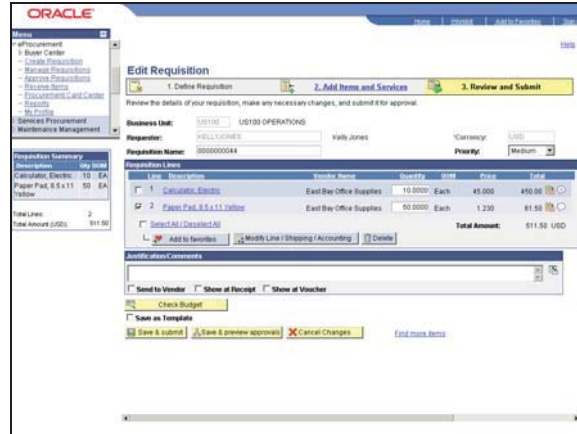
Step	Action
18.	Click in the Ship To field. <input type="text"/>
19.	Enter " US001 " in the Ship To field.
20.	Click the Modify Shipping Address link to access the Shipping Address page where you can enter a shipping address that is not currently defined in the system as a ship to location. The system uses this feature for shipments to a location that will not be used again, for example, shipments to a construction site or other temporary location. Click the Modify Shipping Address link. Modify Shipping Address

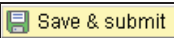


Step	Action
21.	The address for the specified ship to ID is displayed. Use this page to enter a temporary shipping address that has not been defined as a ship to location, for example, a temporary construction site. Click OK to save the address. Click the OK button. <input type="button" value="OK"/>



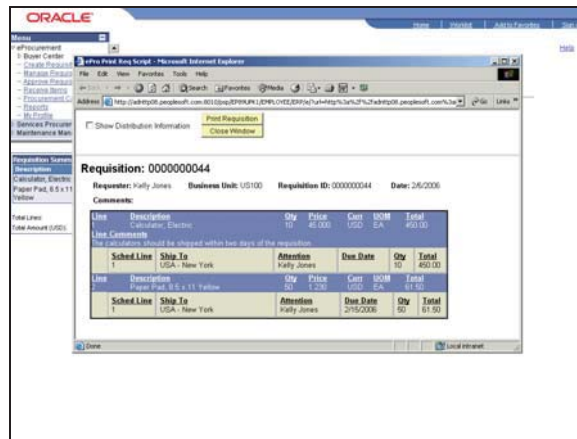
Step	Action
22.	Use the Due Date field to review or change the arrival date of this shipment. The date that you enter here is a suggested date. When the purchase order is created, the system or buyer attempts to meet this date or changes it to a realistic due date. Click in the Due Date field. <input type="text"/>
23.	Enter " 02/15/2006 " in the Due Date field.
24.	In the Attention field, enter the name of the individual who should receive the items. This name displays on the shipping documents. Click in the Attention field. <input type="text"/>
25.	Enter " Kelly Jones " in the Attention field.
26.	Use the Accounting Information section only if you need to change the accounting information for the requisition. The default structure is derived from the user profile, the item category, and from the Define Requisition page.
27.	Click the Apply button. <input type="button" value="Apply"/>



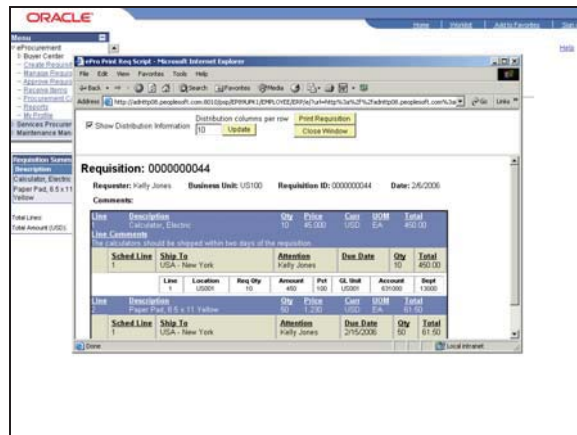
Step	Action
28.	You have edited the requisition. Now, you need to submit this requisition. Click the Save & submit button. 
29.	Use the Confirmation page to confirm requisition checkout information.
30.	Click the Manage Requisitions link to go to the Manage Requisitions component where you can further process the requisition.
31.	Click the Create New Requisition link to add a new requisition.




Step	Action
32.	Click the View a printable version link to preview and print the requisition. Click the View printable version link. View printable version



Step	Action
33.	Click the Show Distribution Information checkbox. <input type="checkbox"/>



Step	Action
34.	Click the vertical scrollbar.
35.	Review the information. Click the Print Requisition button to open a print dialog box to send a page to your local printer.

Step	Action
36.	Click the Close Window button. 
37.	<p>Congratulations. You have just completed the Editing, Saving, and Submitting a Requisition topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - From the Manage Requisitions page, you can access other pages to review requisition details, edit or cancel requisitions, and create change requests. - On the Edit Requisition page, you can add comments, modify shipping information, edit chartfields, and change quantity. - The Edit Requisitions page is only available for open requisitions that have not been approved yet. <p>End of Procedure.</p>

EP.020.560 - Deleting an ePro Requisition & Requisition Lines

This topic demonstrates how to delete an entire requisition, as well as deleting just a line within a requisition. To delete a requisition, or just a particular requisition line, you will use the Manage Requisitions page. From this page you can cancel an entire requisition or click on a Requisition ID to just delete part of it.

To delete a requisition line, you use to click on the Edit Requisition button from the Requisition Details page. Doing so will take you to the Edit Requisition page, which is accessible only for open requisitions. You need to create a change order for a change to a requisition line that already has a PO created for it.

Topic Objectives:

Upon completion of this topic, you will be able to:

- Identify where you can delete a requisition or part of a requisition.
- Describe how to delete part of a requisition that does not have PO created for it.
- Define what selection to use when deleting an entire requisition.
- Delete one line from a requisition.
- Delete an entire requisition.

Procedure

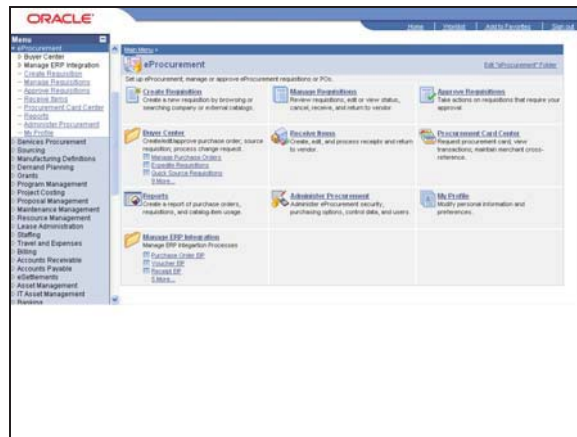
For this topic, imagine that you recently submitted a requisition for two rolling desk chairs, two office side chairs, and two office side tables. You now realize that you do not need the rolling desk chairs and need to delete them from the requisition.

After deleting the rolling desk chairs, you then find out that someone else has already ordered all of the office furniture you needed to purchase. Now you need to delete the entire requisition named office furniture (Req ID = 0000021313).

Let's see how to accomplish both these tasks.



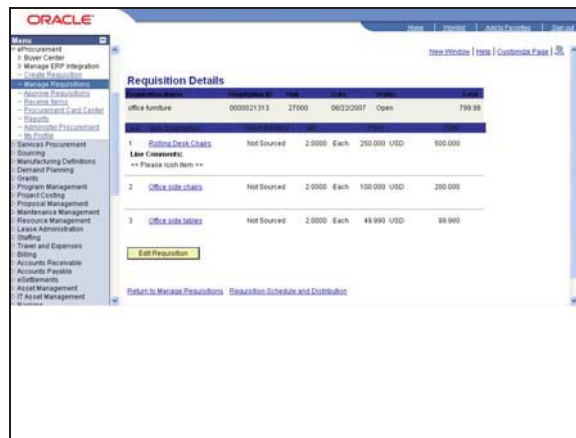
Step	Action
1.	Click the eProcurement link. <div style="border: 1px solid black; padding: 2px; width: fit-content;">▶ eProcurement</div>




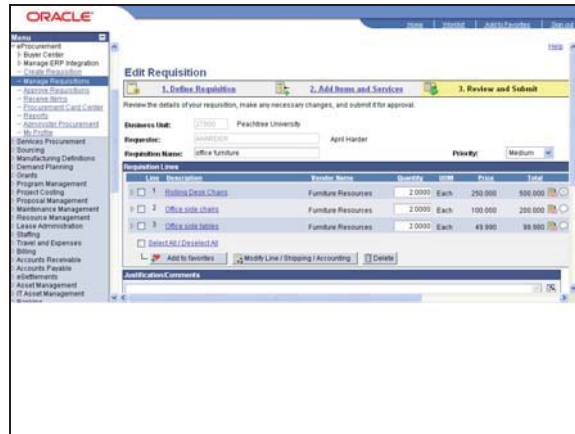
Step	Action
2.	Click the Manage Requisitions link.
3.	Decision: Please make a selection from the options listed below. <ul style="list-style-type: none"> • Cancel Requisition Line Go to step 4 on page 77 • Cancel Requisition Go to step 17 on page 80

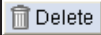
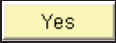




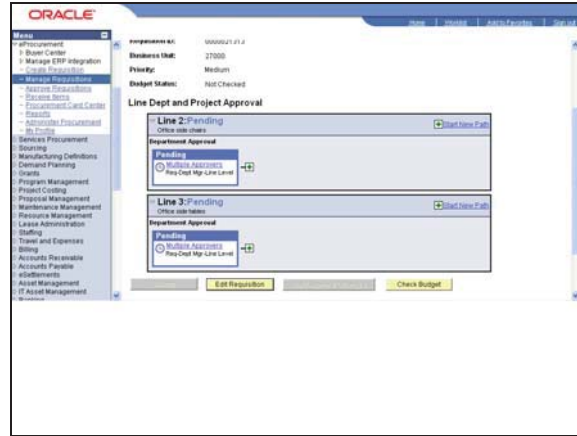
Step	Action
4.	Click the 0000021313 link. <u>0000021313</u>
5.	The Edit Requisition page is accessible only for open requisitions. A change order must be created if there is a need for a change to a requisition line and the PO has been created but not yet dispatched.



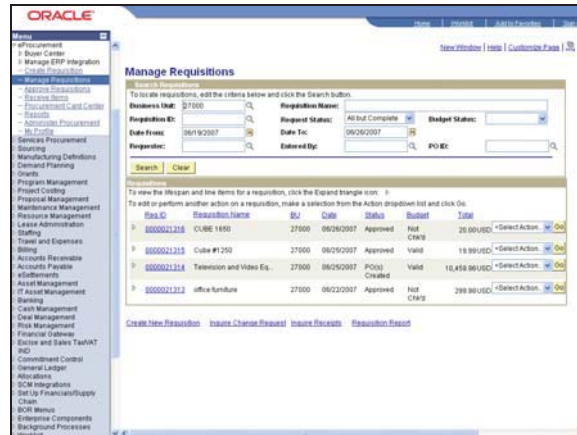
Step	Action
6.	Click the Edit Requisition button. 






Step	Action
7.	Click the Rolling Desk Chairs checkbox. <input type="checkbox"/>
8.	Click the Delete button. 
9.	Click the Yes button. 
10.	Click the Save & submit button. 
11.	Click the OK button. 
12.	Notice that lines two and three remain in a 'Pending' approval status.

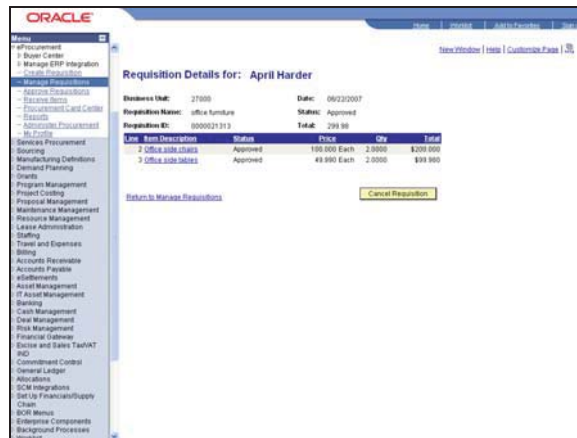


Step	Action
13.	Click the Manage Requisitions link. Manage Requisitions



Step	Action
14.	Click the 0000021313 link. 0000021313
15.	Note that once the requisition has been approved, the Edit Requisition link is no longer available.

Step	Action
16.	<p>Congratulations. You have just completed the Deleting a Requisition Line or a Requisition topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - If a PO has not been created and dispatched, you can delete an entire requisition or just part of it. - If a PO has not been created and dispatched and you need to delete a requisition, or just part of it, go through the Manage Requisitions page. Use the Cancel Requisition selection to do this. - To delete one line from a requisition, proceed to the Edit Requisition page, available only for open requisitions. - You can only edit a requisition if a PO has not been created for it. For requisitions that have a created PO, use the Change Request process. <p>End of Procedure. Remaining steps apply to other paths.</p>
17.	<p>Click the Select Action menu.</p> 
18.	<p>Click the Cancel Requisition list item.</p> 
19.	<p>Click the Go button.</p> 



Step	Action
20.	<p>Click the Cancel Requisition button.</p> 
21.	<p>Notice the status of requisition 0000021313 is now 'Canceled'.</p>

Step	Action
22.	<p>Congratulations. You have just completed the Deleting a Requisition Line or a Requisition topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - If a PO has not been created and dispatched, you can delete an entire requisition or just part of it. - If a PO has not been created and dispatched and you need to delete a requisition, or just part of it, go through the Manage Requisitions page. Use the Cancel Requisition selection to do this. - To delete one line from a requisition, proceed to the Edit Requisition page, available only for open requisitions. - You can only edit a requisition if a PO has not been created for it. For requisitions that have a created PO, use the Change Request process. <p>End of Procedure.</p>

EP.020.620 - Selecting, Adding, and Deleting Favorite Items

This topic demonstrates how to select, add, and delete Favorite Items. Favorites are frequently ordered items that you can maintain in a single location. This list of favorites is a private list that only you can access. It is stored under your User ID.

On the Favorites page, the type field reflects where the item that appears in favorites list originated. All GeorgiaFIRST items will be considered special request items. The special request item icon looks like a waiter.

You can also add items to your Favorites list without saving and submitting a requisition.

Topic Objectives:

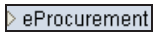
Upon completion of this topic, you will be able to:

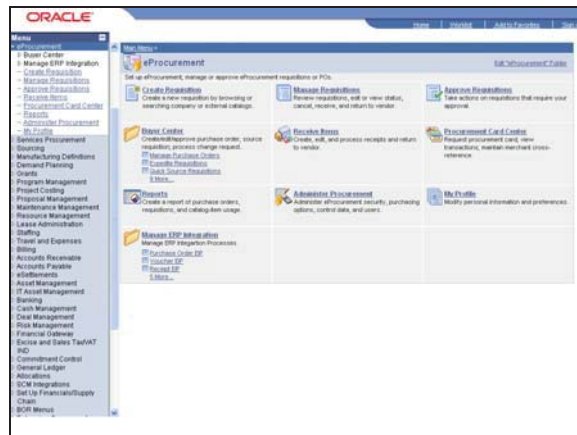
- Identify why a user may want to add items to their Favorites list.
- Describe how to find items already in your Favorites list.
- Identify where you can items to your favorites list during requisition entry.
- Select and add an item to your Favorites list.
- Delete an item from your Favorites list.


Procedure

For this topic, imagine that you want to add four bundles of insulation to your Favorites list. After adding the insulation to your Favorites list, you also have decided to remove acoustical tiles from your Favorites list. Let's see how this is done.



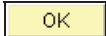


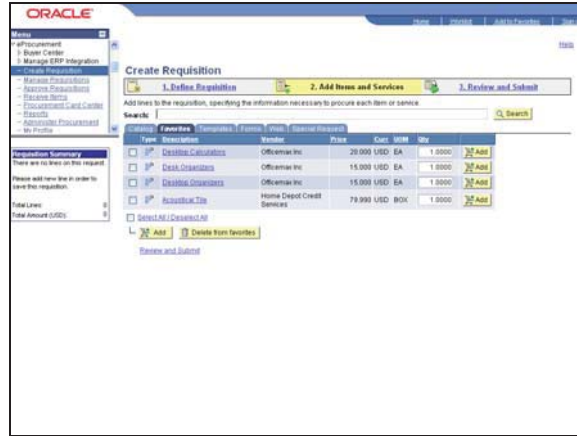
Step	Action
1.	Click the eProcurement link. 



Step	Action
2.	Click the Create Requisition link. 



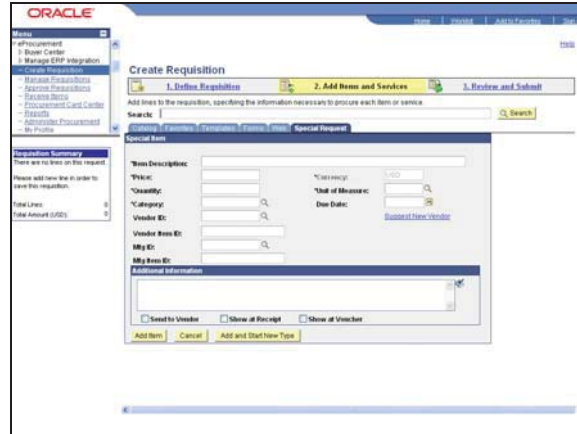
Step	Action
3.	Click the Look up Requester (Alt+5) button. 
4.	Click an entry in the Requester column. 
5.	Click the OK button. 
6.	Decision: Please make a selection from the options listed below. <ul style="list-style-type: none"> • Add a Favorite Item Go to step 7 on page 83 • Delete a Favorite Item Go to step 27 on page 88
7.	This page displays the most current favorite items defined. To add a favorite item to a requisition, select the item and click the Add button. You can update quantities when you check out.

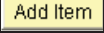



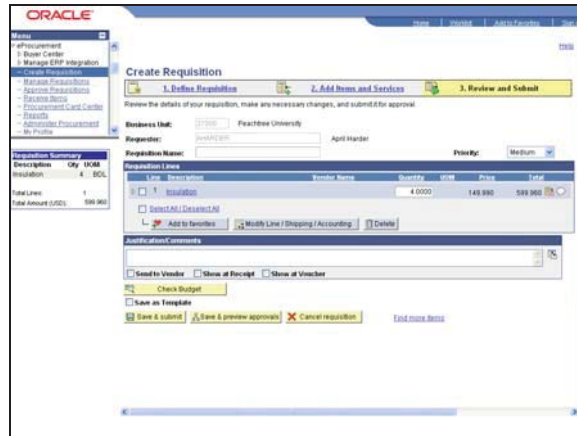
Step	Action
8.	Click the Special Request tab to add an item to a requisition that is not on the list. Special Request

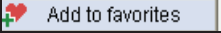


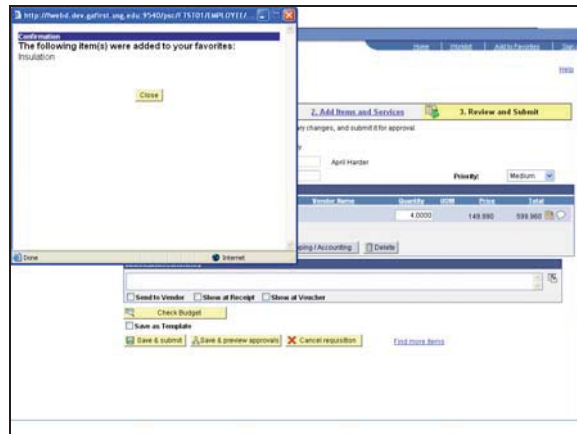
Step	Action
9.	Click the Special Item link. Special Item




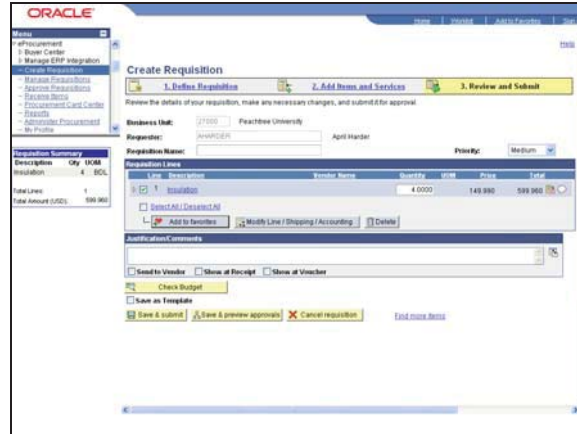
Step	Action
10.	Enter " Insulation " in the Item Description field.
11.	Enter " 149.99 " in the Price field.
12.	Enter " 4 " in the Quantity field.
13.	Enter " bdl " in the Unit of Measure field.
14.	Enter " 01000 " in the Category field.
15.	Enter " 063007 " in the Due Date field.
16.	Click the Add Item button. 
17.	Note that the Special Item page is blank allowing you to immediately add an additional item; however, the Requisition Summary box to the left of the page shows Insulation as being added to the requisition.
18.	Click the 3. Review and Submit link. 
19.	You can add items to the favorites list during requisition entry by using the Review and Submit page Select one or more items using the check box to the left of the item description and click the Add to Favorites link. A message appears confirming that the items have been added to the favorites list. You do not need to save the requisition to add favorites.



Step	Action
20.	Click the Insulation checkbox. <input type="checkbox"/>
21.	Click the Add to favorites button. 



Step	Action
22.	Click the Close button. 

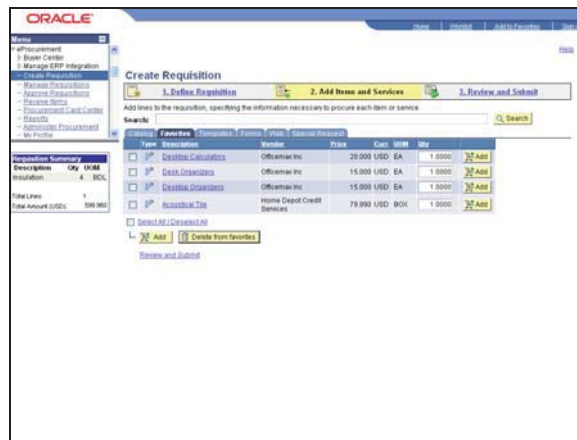


Step	Action
23.	Click the 2. Add Items and Services link. 2. Add Items and Services



Step	Action
24.	Click the Favorites tab to confirm the new item was added. Favorites
25.	Insulation has now been added to your Favorites list.

Step	Action
26.	<p>Congratulations. You have just completed the Selecting, Adding, and Deleting Favorite Items topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - You can add items that you frequently order to a Favorites list. - You can find all of your Favorite items on the Create Requisition – Add Items and Services page, under the Favorites tab. - Add items to the favorites list during requisition entry by using the Review and Submit page. - You do not have to save your requisition to add items to your Favorites list. <p>End of Procedure. Remaining steps apply to other paths.</p>



Step	Action
27.	<p>Click the Special Request checkbox for the item you wish to delete.</p> <input type="checkbox"/>
28.	<p>Click the Delete from favorites button.</p> <input type="button" value="Delete from favorites"/>
29.	<p>The Acoustical Tiles are no longer on the Favorites list.</p>
30.	<p>Congratulations. You have just completed the Selecting, Adding, and Deleting Favorite Items topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - You can add items that you frequently order to a Favorites list. - You can find all of your Favorite items on the Create Requisition – Add Items and Services page, under the Favorites tab. - Add items to the favorites list during requisition entry by using the Review and Submit page. - You do not have to save your requisition to add items to your Favorites list. <p>End of Procedure.</p>

EP.020.670 - Push-Back an ePro Requisition

This topic demonstrates how to push back a requisition that has been previously approved. This is accomplished via workflow.

During the approval process these actions take place:

- The system notifies approvers and reviewers that there is a pending transaction that needs their attention.
- Approvers and reviewers access the transaction details, provide comments, and take action (approve, deny, or **push back**) for the transaction.
- The system checks for additional routings in the same routing path.

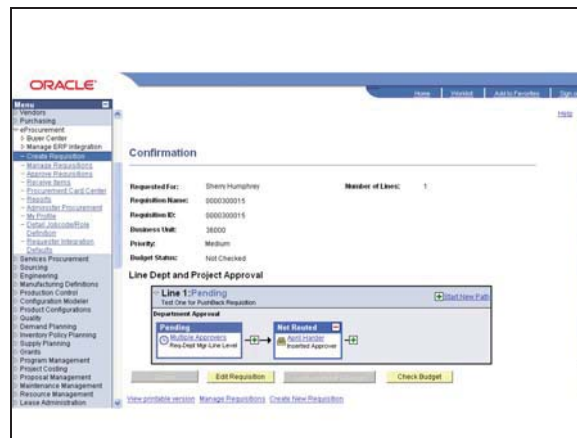
Topic Objectives:

Upon completion of this topic, you will be able to:

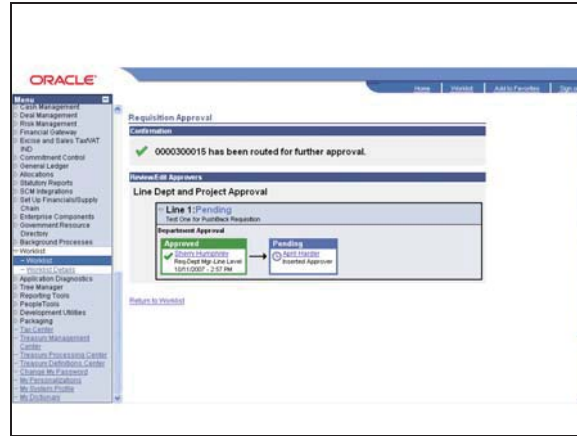
- Identify a worklist item that requires push back.
- Follow the navigation to enter an explanation in the mandatory “Comments” section.
- Understand how the status of a push back requisition changes to pending when a push back is executed. The requisition then needs to go through the approval process again.

Procedure

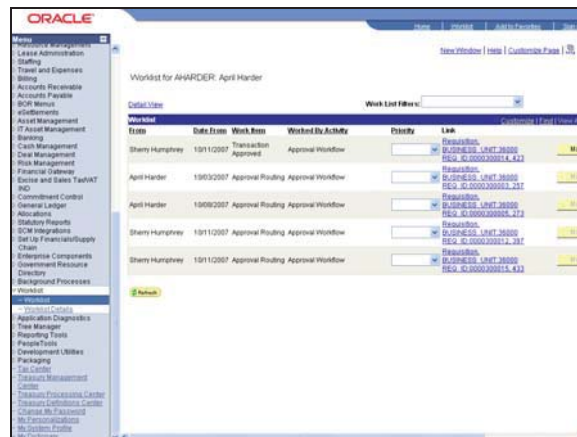
In this topic, you will push back a requisition that has been previously approved. Let's see how you would do this.



Step	Action
1.	Click the Worklist link. Worklist

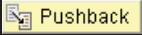


Step	Action
4.	Click the Worklist link. Worklist
5.	The next Approver in the Requisition Approver process must log into PeopleSoft in order to view their work list and approve the requisition.



Step	Action
6.	Click an entry in the Link column. Requisition, BUSINESS_UNIT:36000 REQ_ID:0000300015_433



Step	Action
7.	<p>Before you can process a pushback, you must enter comments for the pushback to be executed.</p> <p>Enter "Pushed back to the previous approver for additional info." in the Enter Approver Comments field.</p> <p>Furthermore, the previously Approver will be re-set to Pending to start the approval process again at that point.</p>
8.	<p>Click the Pushback button.</p> 
9.	<p>Congratulations. You have just completed the Push Back an ePro Requisition. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - Before you can process a pushback, you must enter comments for the pushback to be executed. - The next Approver in the Requisition Approver process must log into PeopleSoft in order to view their work list and approve the requisition. - The previous Approver will be re-set to Pending to start the approval process again. <p>End of Procedure.</p>

EP.020.680 - Delegating Requisition Approval

This topic demonstrates how to delegate approval for requisitions that normally appear in your Worklist. You can select an alternate user to receive your Worklist items if you will be unavailable to approve them. You may want to designate an alternate user to approve your requisitions if you will be out of the office for an extended period of time.

The system automatically forwards any new work items to your alternate user. However, if anything is currently in your Worklist, it will remain there. The system does not reassign items already in the user's Worklist.

Topic Objectives:

Upon completion of this topic, you will be able to:

- Identify what items will and will not be assigned to the alternate user that you designate to approve requisitions.
- Identify where you delegate approval for your Worklist items.
- Define where requisitions pending approval appear for the alternate user that you have designated to approve those transactions.
- Delegate approval for requisitions to an alternate user.

Key term:

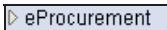
Below is a key term used in this topic:

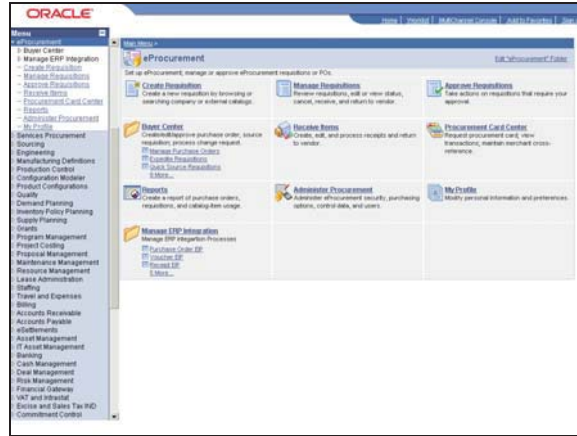
- *Worklist* - Definition of term Worklist is the automated to-do list that PeopleSoft Workflow creates. From the Worklist, you can directly access the pages you need to perform the next action, and then return to the Worklist for another item.

Procedure

For this topic, imagine that you are about to go on a month-long cruise. You will be out of the office from March 1, 2006 to March 31, 2006. You have asked your co-worker, David Morgan, to approval all requisitions that normally come to you. Let's see how this is done.




Step	Action
1.	Begin by navigating to the My Profile page. Click the eProcurement link. 



Step	Action
2.	Click the My Profile link.
3.	Use the My Profile page to specify an alternate user to approve requisitions on your behalf. This page also enables you to change your password and email address.



Step	Action
4.	In this example, you are going to specify David Morgan as an alternate user. Click in the Alternate User ID field. <input type="text"/>
5.	Enter " DAVIDMORGAN " in the Alternate User ID field.

Step	Action
6.	You have assigned an alternate user to approve requisitions on your behalf. You now need to specify the time period for which you will be unavailable. Click in the Effective Date From field. <input type="text"/>
7.	Enter " 03/01/2006 " in the Effective Date From field.
8.	Click in the Effective Date To: field. <input type="text"/>
9.	Enter " 03/31/2006 " in the Effective Date To field.
10.	Click the Save button. 
11.	<p>Congratulations. You have just completed the Delegating Approval of Requisitions topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - If needed, you can delegate your requisition approval responsibilities to an alternate user. - Go to the My Profile link to specify an alternate user to approve requisitions on your behalf. - Only new Worklist items will be forwarded to the alternate user; existing Worklist items will remain. - The alternate user will see the reassigned requisitions awaiting approval in their Worklist. <p>End of Procedure.</p>

EP.020.690 - Using Ad Hoc Requisition Routing

This topic demonstrates how to use Ad Hoc requisition routing. Ad hoc requisition routing adds extra approvers, as well as additional paths for Reviewers to a requisition's approval route.

Selecting a user to be an additional Approver requires the user to approve the requisition line. Selecting a user to be a Reviewer will put the requisition into that user's Worklist, but they will not need to approve the requisition line.

Once you add Ad Hoc Approvers or Reviewers, you cannot change or edit them. You can delete them and add them again to update whether they are approvers or reviewers.

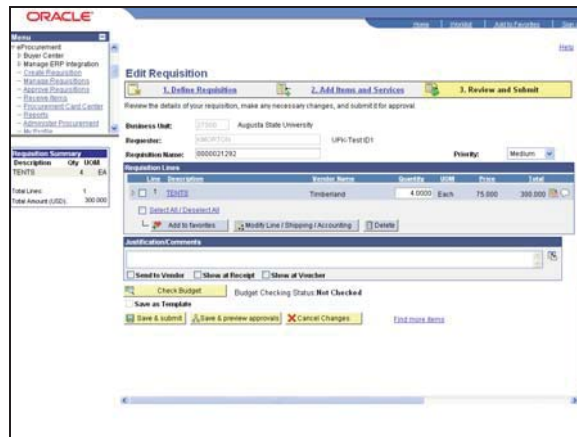
Topic Objectives:



Upon completion of this topic, you will be able to:

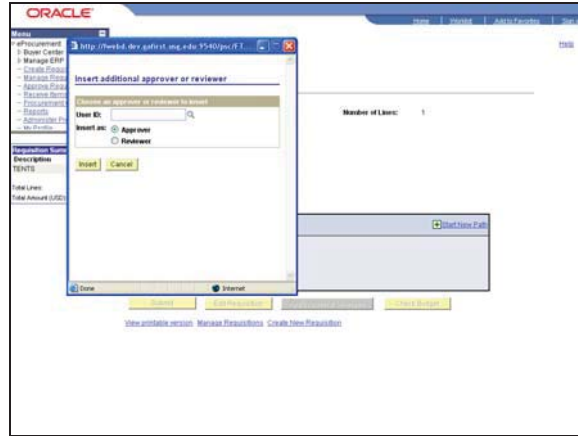
- Describe the difference between an Ad Hoc Approver and Reviewer.
- List what actions need to be taken if the user you want to add as an ad hoc approver or reviewer is not in the Ad Hoc Approval user list.
- Identify where ad hoc approvers and reviewers can be added.
- Add an ad hoc approver and reviewer to a requisition's approval list.



Procedure

For this topic, imagine that you are creating a requisition for four tents. Because this requisition is a little out of the ordinary, you decide to add an additional Approver and Reviewer for this requisition. Let's see how this done.

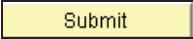



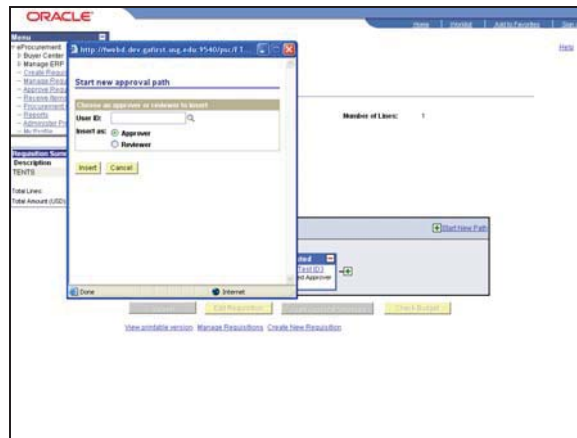
Step	Action
1.	Click the Save & preview approvals button to access the requisition approval routing page. 
2.	Click the Insert Approver button. 
3.	From this page, you can choose to insert an Approver or a Reviewer. Choosing the Approver option will require that the user selected approves the requisition line before it is approved. Selecting the Reviewer option will insert the requisition into the selected users worklist, however, they will not need to approve the requisition line.




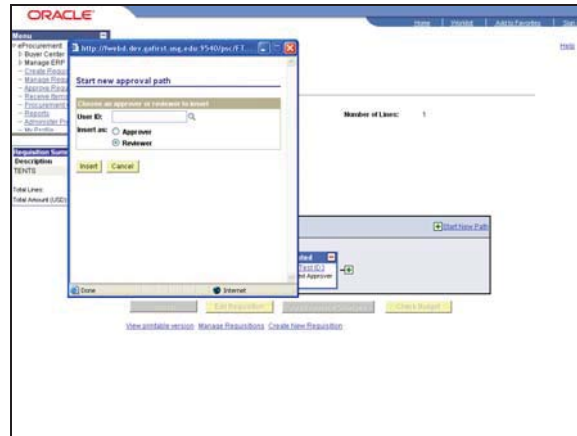
Step	Action
4.	Click the Look up button. 
5.	If an Approver or Reviewer is not in this list, additional security for that user will need to be added. Contact your security administrator to have them added to the Ad Hoc Approval user list.
6.	Click the user you want to approve the requisition line. <input type="text" value="KMORTON3"/> <input type="text" value="UPK TestID3"/>
7.	Click the Insert button. 



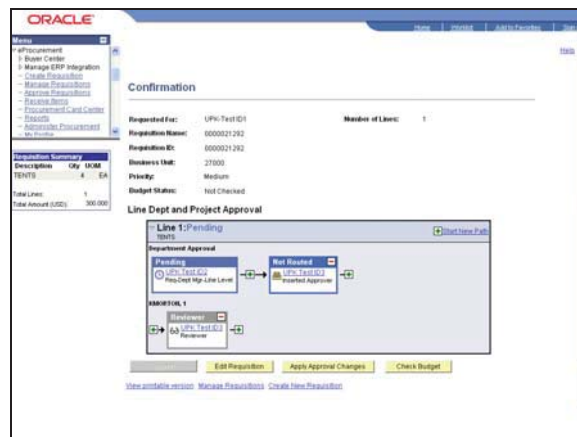
Step	Action
8.	Click the Submit button to send notification of the requisition to the first approver in the approval path. 
9.	When the requisition has been submitted for approval, the routing status will be changed to ' Pending '. Depending on the approvers notification options, a worklist entry and/or an email will be created.
10.	Click the Start New Path button if you want to insert additional Approvers or Reviewers. 



Step	Action
11.	Select the Reviewer option. 



Step	Action
12.	Enter " KMORTON3 " in the User ID field.
13.	Click the Insert button. Insert
14.	Since a New Path and a Reviewer was selected, an additional line was inserted into the routing path.



Step	Action
15.	When changes are made after a requisition is submitted for approval, you must select the Apply Approval Changes button. Apply Approval Changes

Step	Action
16.	<p>Congratulations. You have just completed the Using Ad Hoc Requisition Routing topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - Adding an Ad Hoc Approver requires the additional user approve the requisition. - Adding a new path for an Ad Hoc Reviewer puts the requisition into the Reviewer's Worklist, but does not require approval. - To access the requisition approval routing page and add ad hoc approvers and reviewers, click the Save & preview approvals button on the Review and Submit page when editing or creating requisitions. - When adding an Ad Hoc Approver and you cannot find that person in the Ad Hoc Approval user list, you need to contact your security administrator to have that person added to that list. <p>End of Procedure.</p>

EP.020.570 - Budget Checking Requisitions

This topic demonstrates how to budget check requisitions in batch by running the Commitment Control Budget Processor. Budget checking is the processing of source transactions against control budget ledgers to see if they pass, fail, or pass with a warning.

To budget check requisitions in batch, you need to access the Requisition Budget Check page to initiate the Commitment Control Budget Processor. When Budget Checking requisitions in batch, you can run the process on all requisitions or just on certain ones selected by requisition ID, date, requester, origin, or status.

There are two other places where you can individually budget check requisitions. You can click the Check Budget button on the Review and Submit page when creating a requisition. You can also budget check requisitions individually by selecting the Budget Check choice on the Manage Requisitions – Requisition page.

Topic Objectives:

Upon completion of this topic, you will be able to:

- List the different ways you can budget check requisitions.
- Identify the page used to initiate the Commitment Control Budget Processor process for requisitions.
- Define why it is necessary to create a unique run control ID for each independent type of source transaction that you want to budget check.
- Run the Budget Checking Requisitions process in batch.

Key term:

Below is a key term used in this topic:

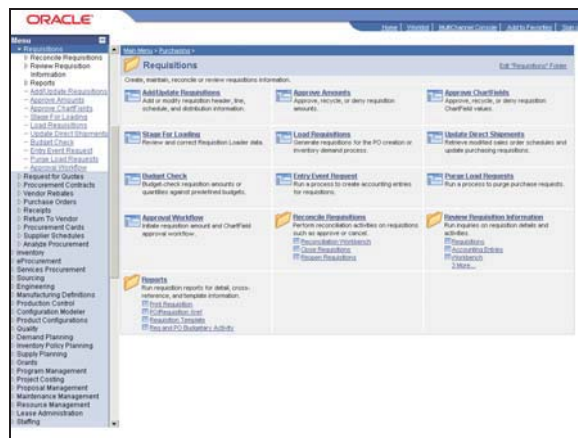
- *Budget Check* - Definition of Budget Check in commitment control is the processing of source transactions against control budget ledgers to see if they pass, fail, or pass with a warning.

Procedure

For this topic, imagine that you need to budget check all requisitions that have not been checked yet. To accomplish this, you decide it is best to run the Budget Checking process. Let's see how this is done.



Step	Action
1.	Begin by navigating to the Req Budget Check page. Click the Purchasing link. Purchasing
2.	Click the Requisitions link.




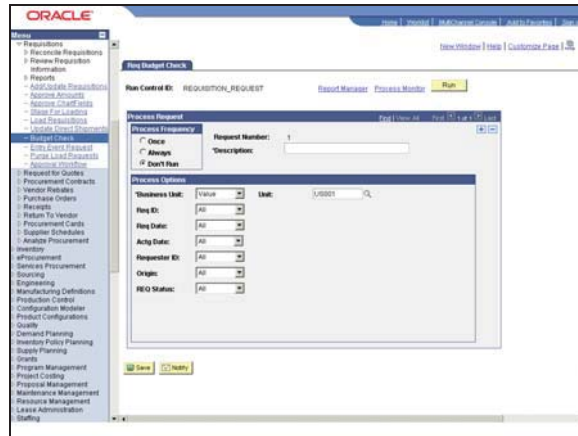
Step	Action
3.	Click the Budget Check link.
4.	A Run Control ID is an identifier that, when paired with your User ID, uniquely identifies the process you are running. The Run Control ID defines parameters that are used when a process is run. This ensures that when a process runs in the background, the system does not prompt you for additional values.
5.	<p>It will be necessary to create a unique run control ID for each type of source transaction that you want to budget check independently of other source transactions.</p> <p>For example, if you use the same run control ID for purchase orders and requisitions, the budget processor will process both purchase orders and requisitions existing at the time the run control ID is used to initiate the budget checking process. Check the two source transactions independently of one another.</p>






Step	Action
6.	Click the Add a New Value tab.

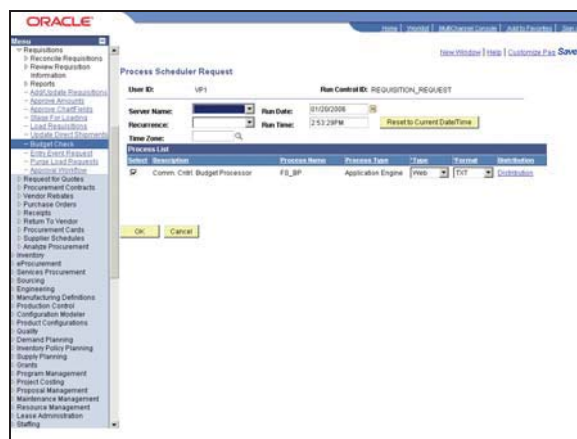





Step	Action
7.	Enter " REQUISITION_REQUEST " in the Run Control ID field.
8.	Click the Search (Alt+1) button. 
9.	Use the Req Budget Check page to initiate the Comm. Ctrl. Budget Processor process for requisitions.




Step	Action
10.	Click the Always option. 
11.	Click in the *Description field. 
12.	Enter " Requisition Loader Request " in the *Description field.

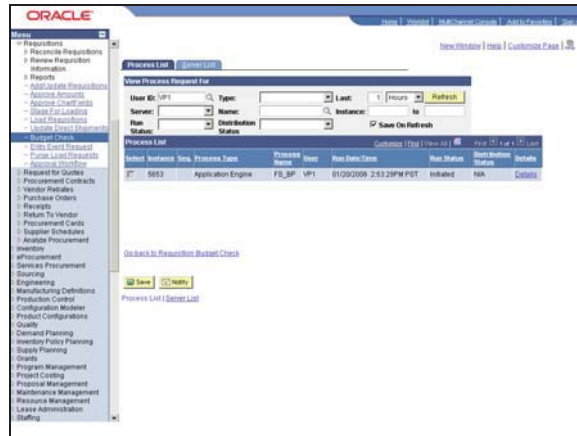
Step	Action
13.	Use the Business Unit field to specify the business unit for the requisition. You can either select All to specify all business units or Value to specify a particular business unit.
14.	Valid Values for Req ID are: <ul style="list-style-type: none"> • All: Select to budget check all requisitions. • Some: Select to display the From and To fields. Budget checks all requisitions that match the date range specified. • Value: Select to display the Req ID field. Budget checks the requisition that matches the ID specified in the Req ID field.
15.	Values for the Req Date field are: <ul style="list-style-type: none"> • All: Select to budget check all requisitions. • Some: Displays the From and To fields. Budget checks all requisitions for which creation dates fall within the dates specified. • Value: Displays the Req Date field. Budget checks requisitions for which creation dates match the date specified in the Req Date field.
16.	Click the Run button. 
17.	Use the Process Scheduler Request page to enter or update parameters, such as server name and process output format.




Step	Action
18.	You must select a Server Name to identify the server on which the process will run. If you use the same Run Control ID for subsequent processes, the server name that you last used will default in this field. Click the Server Name list. 
19.	Click the relevant entry in the Server Name list. 
20.	Click the Ok (Enter) button. 



Step	Action
21.	Notice the Process Instance number appears. This number helps you identify the process you have run when you check the status. Click the Process Monitor link. 
22.	Use the Process List page to view the status of submitted process requests.



Step	Action
23.	The current status of the process is Initiated. The process is finished when the status is Success. Continue to click the Refresh button until the status is Success. Click the Refresh button. 
24.	The Run Status is now Success.
25.	Congratulations. You have just completed the Budget Checking Requisitions topic. Below is a summary of the key concepts of this topic: <ul style="list-style-type: none"> - You can budget check requisitions individually or in batch. - To budget check requisitions in batch, access the Requisition Budget Check page. - In batch, you can budget check all requisitions or just the ones you indicate by date, requester ID, origin, or status. - Creating a unique run control ID for each type of source transaction you need to budget check allows you to run the process on the different types of transactions independent of each other. End of Procedure.

EP.020.590 - Using the Buyer Center

This topic provides an overview of the Buyer Center. The Buyer Center is a PeopleSoft eProcurement tool that allows Buyers to perform a wide variety of processes related to managing and processing Requisitions and Purchase Orders. These processes include the following:

- Expediting Requisitions
- Dispatching Purchase Orders
- Processing Requisitions and change requests from requesters
- Approving change requests
- Running procurement processes
- Accessing inquiries and reports
- Generating and viewing PeopleSoft eProcurement information