PeopleSoft Financials 9.1

Requisition Guide

For Approvers

Requisition Guide for Approvers

Table of Contents

1.0 Entering a Requisition (Review)

Overview

A requisition is the first step in the procurement process. The format of a requisition within the system is made up of 4 basic parts, Header, Line, Schedule, and Distribution.

The requester fills out the requisition for the supplies/equipment/services required for their department or project. After the requisition has been filled out completely, the department approver must approve it. Following approval, the budget checking process will be run to verify that budget exists and a pre-encumbrance will be created for the requisition. Staff in purchasing, who will create a purchase order, will then pick up the requisition.

Basic steps for Requisitioning

Header

1. Add a new requisition to the system
2. Select the recommended vendor on the Header Defaults
3. Select a Ship To location on the Header Defaults
4. Verify that the Default Distribution has been brought in successfully

Line

5. Enter a Description for the item to be requested
6. Enter the quantity, unit of measure, category, and price
7. Verify the Ship To location from the Header Defaults

Schedule

8. Verify that the schedule information has been defaulted in from the Header and Line correctly
9. Insert any additional schedules that are required (normally only one schedule is required)

Distribution

10. Verify that the Default Distribution has been brought in successfully
11. If distribution needs to be changed,
    - Account: select the Account from the dropdown
    - Department: use the SpeedChart dropdown to select a valid Dept/Program/Fund

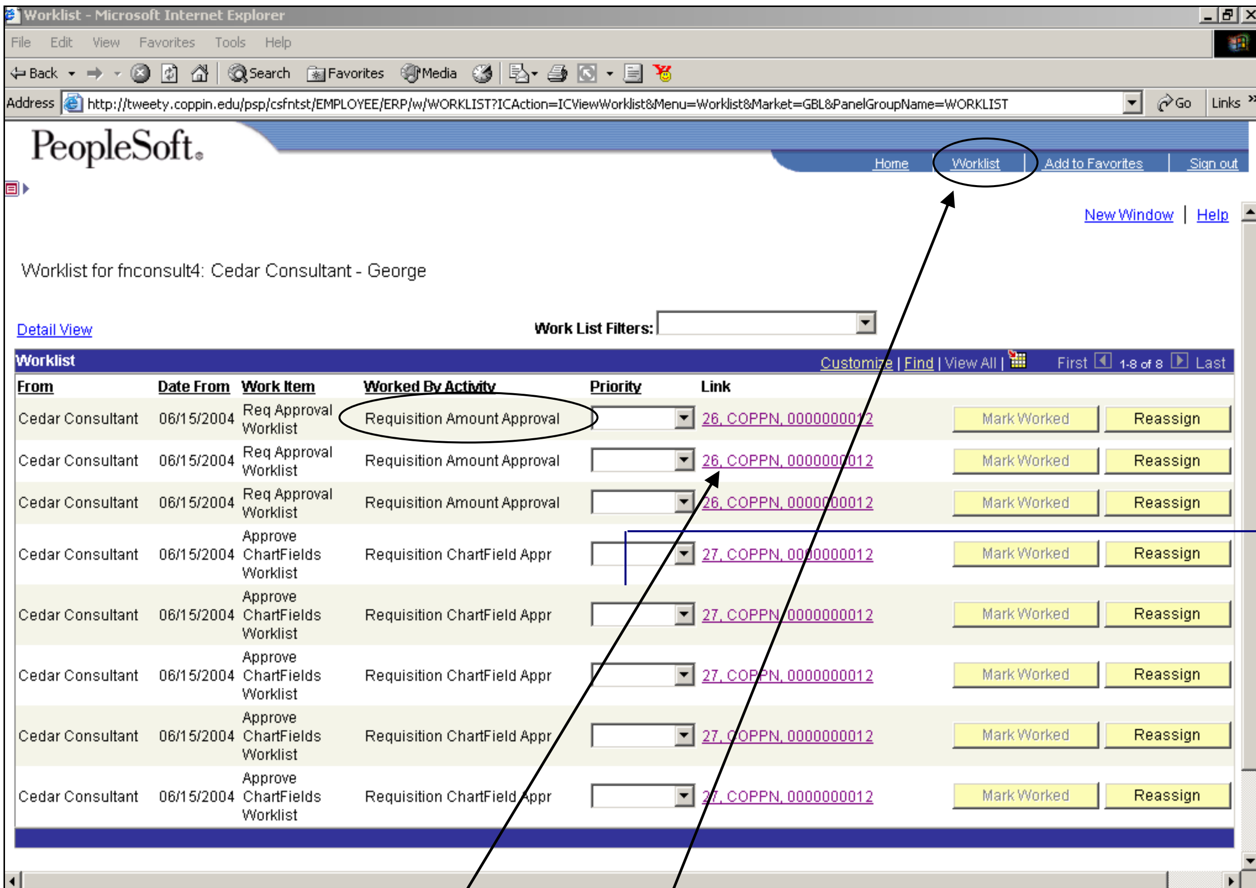
Following Entry

12. Click the **[Save]** button

2.0 Workflow

Review Worklist

Worklist: To Review your worklist click the **[Worklist]** icon on the top PS line.



Worklist: To Review your worklist click the [Worklist] icon on the top PS line.

The items to be "worked" are listed under the Worklist heading. These are the Requisitions that require attention to have the Requisition Chartfield Approved or the Requisition Amount Approved.

Link: From your worklist you can go directly to the PS screen that requires you to perform the approval.

Click the purple link that lists the BU: COPPN and the Requisition number.

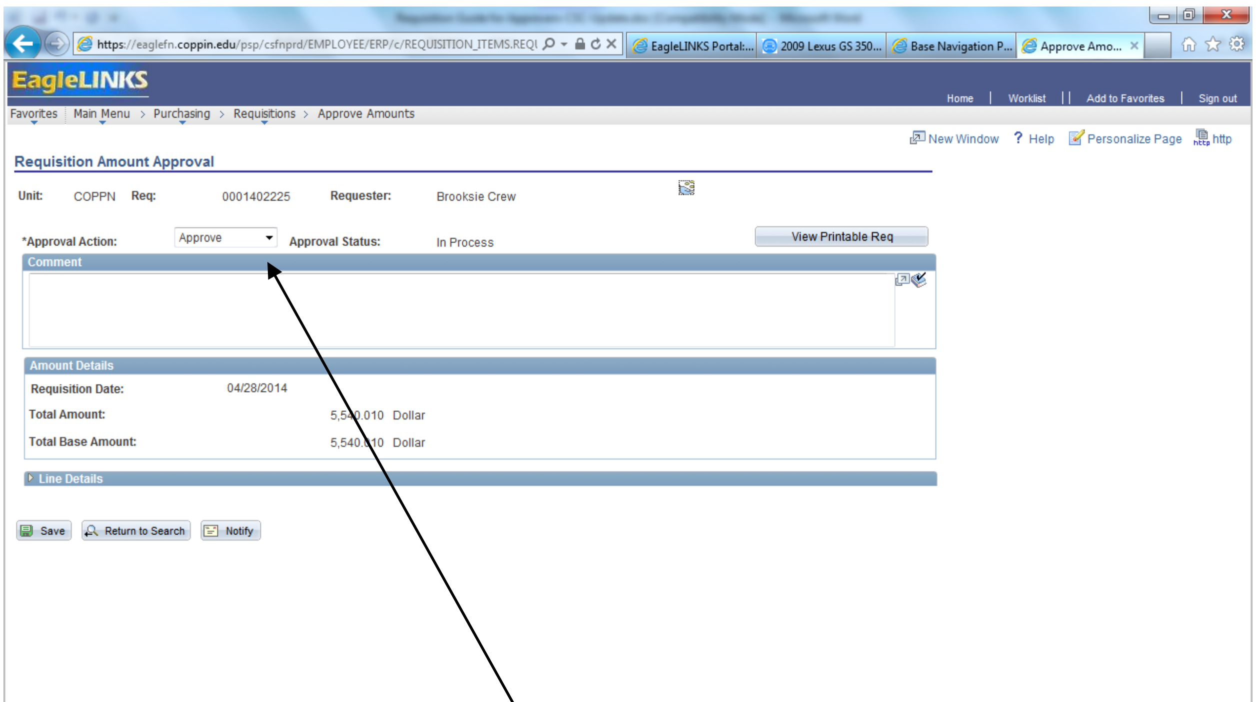
3.0 Requisition – Amount Approval

If the Worklist does not take you to the Amount Approval the NAVIGATION is ***Purchasing>Requisitions>Amount Approval***

Amount Approval Screen

The Approval process is fairly simple. Just click on the purple link to bring up the requisition that is to be approved. The approval process applies to the entire Requisition not just single lines.

The Amount Approval is to verify the total amount of the Requisition.



Review the Total amount of the Requisition each line to verify that you agree with the amount that is to be spent on each item.

If you agree with the amount of the Requisition then you can approve the Req by making sure the Approval Action is **Approve**

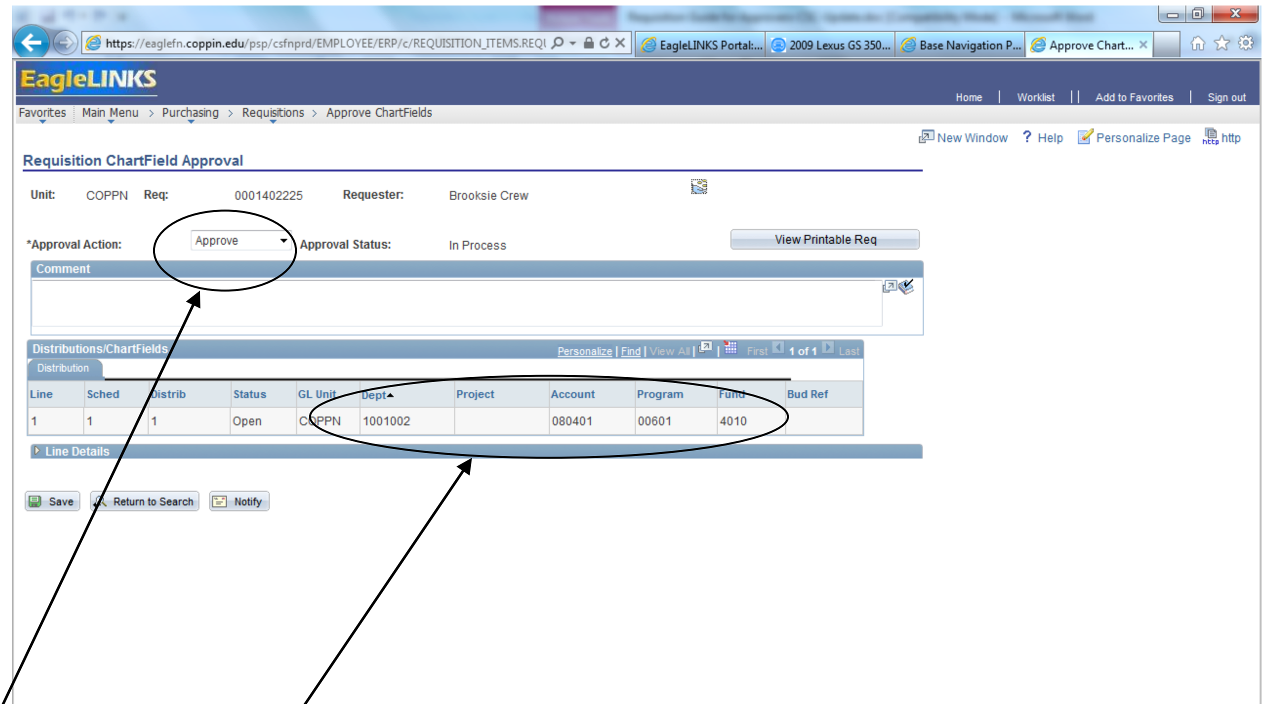
Approval Actions are: **Approve**
Deny
Recycle

Click 

Again the Approval does not take effect until you click Save.
** Note ** - Only certain users have the security to Approve Requisitions

4.0 Requisition – Chartfield Approval

If the Worklist does not take you to the Amount Approval the NAVIGATION is ***Purchasing>Requisitions>Chartfield Approval***



Review the Chartfields of the Requisition each line to verify that you agree with the amount that is to be spent on each item.

If you agree with the Chartfields assigned on the Requisition then you can approve the Req by making sure the Approval Status is **Approve**

Approval Actions are: **Approve**
Deny
Recycle

Click 

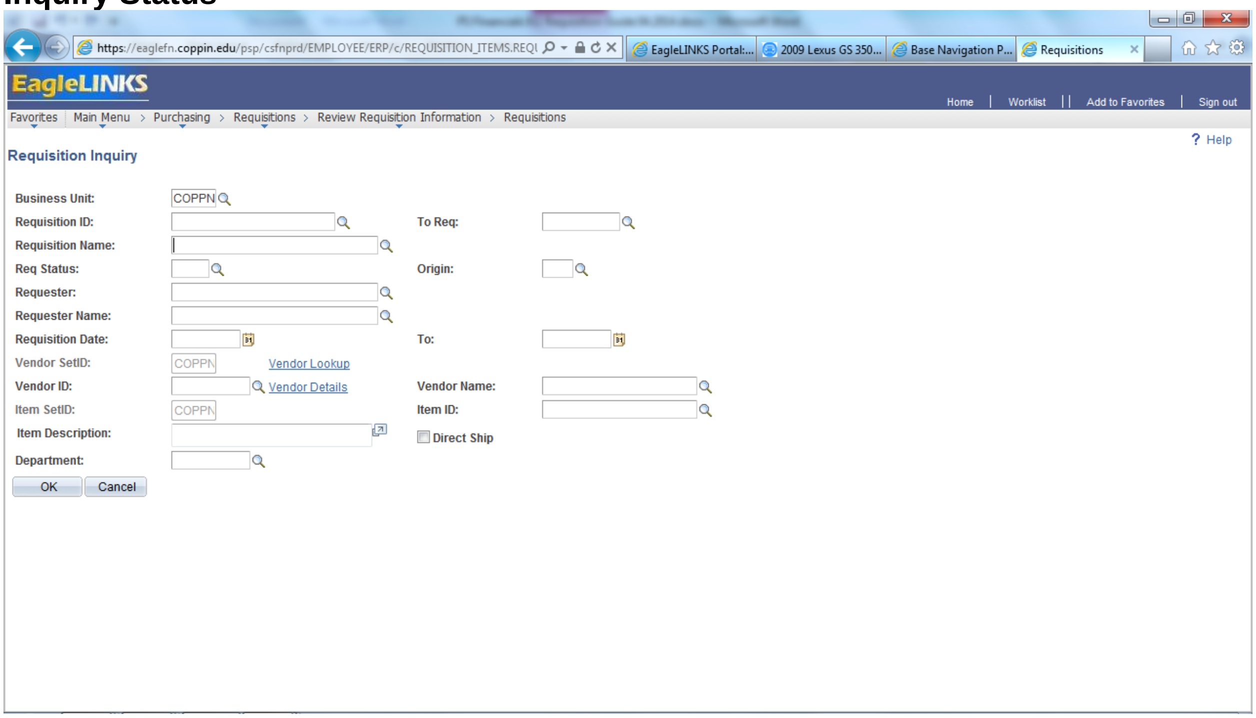
Again the Approval does not take effect until you click Save.
** Note ** - Only certain users have the security to Approve Requisitions

7.0 Inquiry/Tracking a Requisition

As the Requester you can review the Requisition or track the status of that Requisition.

NAVIGATION: ***Purchasing>Requisitions>Review Requisition Information>Requisitions***

Inquiry Status

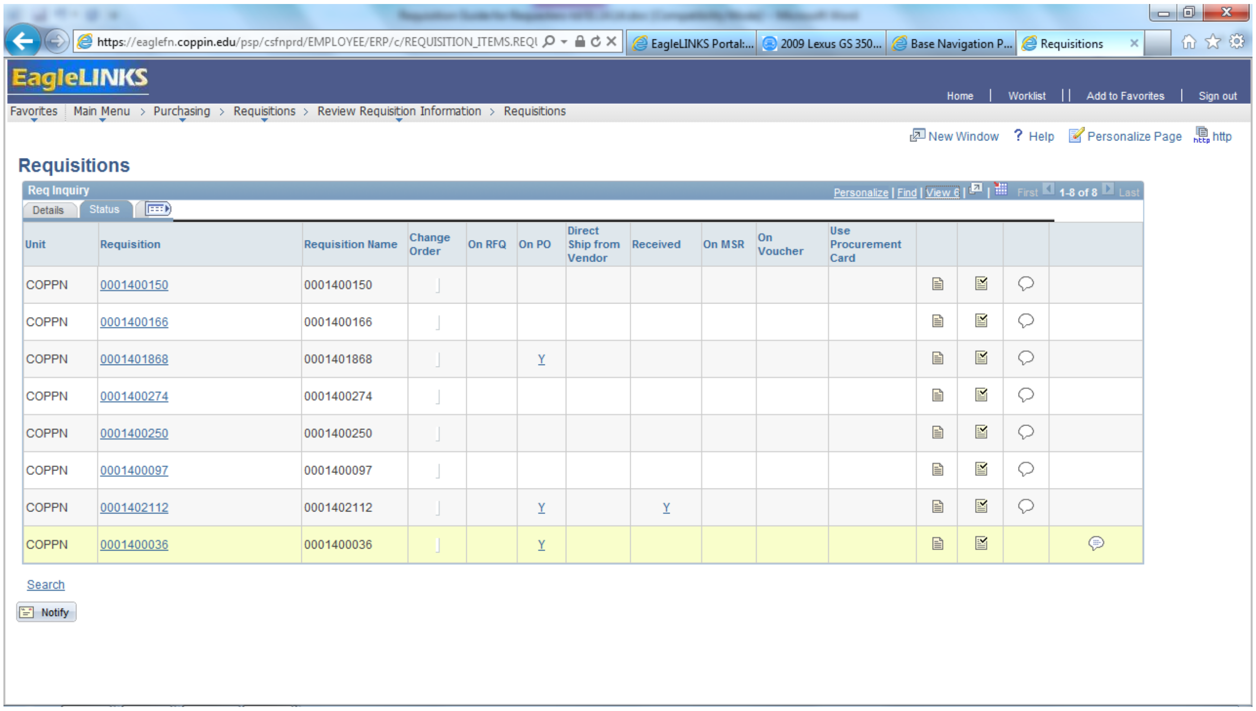


Enter the Requisition Number in the Requisition ID box or If you click OK you will get a list of ALL Coppin Requisitions.

This may be a big list that can be narrowed down by entering as many of the fields that you'd like to specify which requisition you would like to review.

Click on the Requisition (blue) that you would like to view or work on.

Click OK.



The Inquiry Details screen shows you all the requisitions selected. It gives very brief information about each requisition.

The columns on the  tab show the progression of the Requisition. If there is a Y next to the Requisition ID: then this requisition has been progressed further along the procurement path.

You can inquire on the **RFQ, PO, Received**, and **Voucher** by clicking on the **Y** (blue).

The yellow box with the arrow in it  shows you both screens at once when it is clicked.