Online Requisition Quick Reference Guide

1. To create a Requisition, navigate to the Maintain Requisition page:

Purchasing  Requisitions  Add/Update Requisitions



2. Click  *(Do NOT delete the word “NEXT” in the Req ID field. PeopleSoft automatically numbers each requisition that is entered into the system.)*



Maintain Requisition Page

3. Select a Requestor using the Search Icon. 

4. Enter information on the Line Detail area.

5. If you need more than one *line* on a requisition, you will need to add additional lines. To insert

 additional *lines*, click the “plus sign” icon  .

6. For each Line Detail, complete the Description, Quantity, UOM, Category ID, and Price.

7. Click the Add Comments link on the Maintain Requisition page to add any necessary

 comments pertaining to the entire requisition; i.e., the vendor is not in the system, direct delivery

 location.

a. Enter text in the Comments text window.

b. Select the following boxes. 

 Click  to return to the Maintain Requisition page.

 8. Attaching Documents

 There will be times when you will need to submit backup paperwork for a requisition such as a contract, Terms and Conditions, quote or a sole source. It is preferred that you do an on- line attachment in the requisition module in PeopleSoft.

 Before attachments can be added to the requisition, the hard copies will need to be scanned and saved to a directory.

a. Click the **Add Comments** link on the **Maintain Requisition** page to add an attachment.



b. Click on the Attach tab



 c. Click on the Browse

 

d. Choose the file that you want to attach.

e. Click the Upload tab. To attach multiple documents, click the plus sign next to the word Inactivate above the comments box and follow the same above instructions for adding attachments.



f. Type in the word **“Attached”** and what the attachment is in the Comments Text

 Window. Select the three boxes – click **OK** to return to the **Maintain Requisition**

 page.

 9. Click the Requisition Defaults link.



 a. Click the Buyer search icon for a list of approved Buyers.

 b. Enter a Vendor ID, or click the Vendor search icon for a list of Vendors. To conduct an

 advanced search for a Vendor, select the Vendor Lookup link.

 Type in the first few letters of the vendor name in the ShortName Box. Click Search.

 A list of results is displayed.

 c. Select the appropriate Vendor. *Note: You should select a Vendor whose Address*

 *Description is listed as ORDER.*

 d. Click .

 *Note: In some cases the vendor is not listed in the PeopleSoft vendor file. In that case enter the vendor name, address and FID number in the ADD COMMENT link on the Maintain Requisition page.*

e. Distributions:

 From the **Requisition Defaults page** scroll down to the **Distributions Details** line.

 Enter the **Percentage** (100).

 Required Chartfield includes: Percentage, GL Unit, Tcode, Fund, Prog Fin, Department.

**NEVER ENTER AN ACCOUNT NUMBER. THE CATEGORY ID # THAT YOU ENTER IS LINKED TO THE ACCOUNT # WHICH THE SYSTEM WILL AUTOMATICALLY ENTER**.

NOTE: GL Unit should be UMBC1 and Tcode should always be 242.

If distributing to a **Project**, the following additional ChartFields must be completed: PC Business Unit (UMBC 1), Project and Activity ID.

### Picture 2 Note: There may be times when you wish to distribute the expense to more than one chartstring. When this is the case, after adding the Line Detail information, click the Schedule icon Picture 2 at the far right side of the Line Detail text box. This will return you to the Maintain Requisitions page. Click the Distribution icon Picture 3. Then click the plus sign Picture 1 at the far right of the distribution line and indicate how many additional rows you want to add in the dialog box that appears at the top of the screen. The default is 1. Then click OK.

 The new line is added and you can add the additional chartstring information. You must change the percent from 100 to whatever percentage you need to distribute the cost over the two chartstrings.

 **Note**: There may be times when the Chartstring you entered in the Requisition Defaults page does not carry over for the entire requisition. When this is the case, in the line detail information on the Maintain Requisition page, click the Schedule icon  at the far right side of the detail line. This will bring you to the Schedule page. Click the Distribution icon . Check the Distribution line to make sure that your Chartstring is correct.

10. Click . The Mark All screen will appear on the screen.

11. Click the Mark All Link. The checkboxes in the Apply column are selected.

 12. Click.  . You will be returned to the Maintain Requisition page.

 13. Click  to SAVE your Requisition. The Requisition ID number field is populated.

 14. Printing Requisitions

 To print your requisition before approval from your approver, click on the View Printable Version link on the Maintain Requisitions page. Note that your Requisition must be saved prior to printing it. You will be prompted to do so during the printing process. After clicking OK, you will get an error message stating that you do not have permission required to run the window option. Click OK. On the menu click People Tools and follow the breadcrumbs below:

 Process Scheduler  Process Monitor  Click refresh until your run status states success  Click details (highlighted in blue)  Click view Log/Trace  Click on PDF Link  Print requisition

*Change Orders:*

Remember that **NO CHANGES** can be made online to a Requisition once it has been approved.

If any changes need to be made on the requisition or if the requisition has been sourced to a PO

and changes need to be made, you will need to submit the change to Procurement by entering a

requisition in PeopleSoft.

When entering the description on the Maintain Requisition page, you will need to type CHANGE ORDER and what changes need to be done on the purchase order. (Reference the Purchase Order #). Click on the Add Comments link on the Maintain Requisition page and type CHANGE ORDER to PO #\_\_\_\_\_\_\_ in the comments box and check the three

boxes.