

CREATING A PEOPLESFT REQUISITION

Quick Reference

This Quick Reference guide is for people who need reminders rather than full instructions.

To Begin Creating a Requisition

After logging on, choose the following from the Main Menu:

1. Purchasing
2. Requisitions
3. Maintain Requisitions
4. Click "Add" button. *Do not change the Business Unit or Requisition ID information!*
5. Click on "Header Default" link at bottom left.

HEADER DEFAULT PAGE

Default Options

Leave at "Override."

Only the Vendor number may be entered in "Vendor" field. Do not enter vendor name here.

On the Header Defaults page, click on the "Vendor Lookup" link (blue letters under the Vendor box).

1. Enter the vendor's name. If it doesn't come up, try entering the percent sign (%) as a wildcard, then enter the most unique word of vendor name ("Stationers" as opposed to "Arcata").
2. Click "Search".
3. Once search results are available, click "View All" to access full results.
4. There may be more than one address per vendor. To check address, click select box ("Sel") to left of vendor name.
5. Click "Address" link at lower right to view vendor information. If it is correct, click "OK."
6. At the vendor lookup page, click "OK" a second time. You will be returned to the Header Default page.



If you cannot find the vendor or address you need, enter 0000003409 into the Vendor field on the Header Default page. Click the "Refresh" button; "XXX-Change Me" will come up as the vendor name.

Due Date

1. Click the calendar icon, or type in a due date.
2. If you do not have a due date, make it 2 weeks from the date you create your requisition.

Ship To Locations

The default “Ship To” address is “SR” for “Shipping & Receiving”. From the dropdown menu you will see (NT) following some locations. This indicates that the order is not taxable, e.g. Service Order or Blanket Order. **NOTE:** The “Ship To” must be exactly the same for every line item.

Distributions

1. Distributions at this level must apply to the total amount of the entire requisition. Any other split distributions must occur at the line level.

The following fields must be populated

Percent (will automatically populate at 100% if left blank)

Account

Fund Code

Dept

Program (use 5 zeros if there is no code)

Class (use 5 zeros if there is no code)

Budget Date (populates automatically – leave as is)

Project (use 6 zeros if there is no code)

Location

After completing the Header Default information, click “OK” to return to the Form Page.

FORM PAGE

Description

1. Enter *complete* description.
2. Blanket purchase requisitions should read, “Blanket Purchase Order for (commodities) for the *** Department.”
3. Service requisitions should read, “Service order for the performance of (service) for the *** Department.”
4. Blanket service requisitions should read, “Blanket Service Order for (service) for the *** Department.”
5. Description field holds a maximum of 254 characters. Use Line Comments to extend a long description.



Don't forget to include the Standard Header Comment for blanket or service requisitions.

UOM - Unit of Measure

Use correct unit of measure. For instance, do not enter "EA" and specify a *pair* of boots in the description. The UOM in this case should be "PR."

Category Code

1. Use the miscellaneous codes unless item is Computer Equipment, IT related, or has recycle content. Then use one of the codes shown below. Use of any other codes is not required.

57800 – Miscellaneous Products

96200 – Miscellaneous Services

20400 – Computer Equipment between \$500-\$4999

20600 – Computer Equipment over \$4999

20700 – Computer Software under \$500

20800 – Computer Software between \$500-\$4999

20900 – Computer Software over \$4999

72500 – Telecom/Radio/Phone Equipment/Supplies

93600 – IT Equipment Maintenance/Repair

19099 – Recycled Solvents

33569 – Recycled Compost

40587 – Recycled Petroleum/Oil

44062 – Recycled Glass

57099 – Recycled Steel

63079 – Recycled Paints

64066 – Recycled Paper Products

64599 – Recycled Paper Office /Printing

66572 – Recycled Plastic

86365 – Recapped/Retread Tires

Ship To

This field will populate from the Header Default page when you save for the first time. **It must remain the same for all lines of the requisition.**

General Form Page Instructions

1. Line items may be added or deleted by using the plus and minus signs at the end of each line.
2. Shipping and handling should both be entered as line items.
3. You cannot enter a negative total on a requisition; put discount information in a Header Comment.
4. You may enter a unit price with up to five decimal places. PeopleSoft will calculate it correctly, but only two decimal places will show in the extended price. If it is necessary to show more than two decimal places, use the total amount and enter it as "1 each". Show the actual price per item in the description.

HEADER AND LINE COMMENTS

Both Header and Line Comments may be used to provide additional information:

Header Comments relate to the entire requisition

Line Comments relate only to a specific line item

1. To access, click either “Header Comments” or “Line Comments” on the lower section of the Form page.
2. Either type your comment into the field, or click on “Standard Comments” at the lower section of the Comment page.
3. Standard Comments should be used for:

	Standard Comment	Comment ID
Blanket purchase requisitions	BLK	BLK
Blanket service requisitions	SVC	SBLK
Service requisitions	SVC	SVC
Chartfield Information	STD	ACT

4. For any kind of comment, check all three boxes beneath the Comment field: “Send to Vendor”, “Shown at Receipt”, and “Shown at Voucher”

SPLIT CHARTFIELD DISTRIBUTIONS

1. To enter more than one chartfield string for a line item, click on the “Schedule” tab, then click the “Distribution” link on the lower left corner of the page.
2. You can distribute based on quantity or amount. Make change to original line before adding additional lines. For instance, if the price of the item is to be split 50-50, change the percent field to “50” before clicking the plus sign to add another chartfield string. Information will be copied down to the new string where you can edit as needed.

PRINT A REQUISITION

On the Requisition Form Page, click on the blue ...More... dropdown in the lower right hand corner of the page, and click on 02 – Preview Req. You will automatically be taken to the Reports Manager – View Reports Page.

Click on the Refresh button to pull up the report. The description will read “Requisition Print SQR.”

Click on Refresh until the Status indicates “Posted.” Click on the blue Details link, then click on the PDF link.

Your Requisition will come up in Adobe Acrobat in a new window to be printed.

REVIEW REQUISITION INFORMATION

Main Menu

Click:

1. Purchasing
2. Requisitions
3. Review Requisition Information
4. Requisitions (provides links to information pages pertaining to the Requisition);

OR

5. Document Status (provides document ID numbers and links to the documents associated with the Requisition) You can also access this page from the original Requisition Form page. Click on the "More" drop-down menu and click 12 – Document Status Inquiry.
6. To cross reference Requisition numbers with PO numbers, run one of the queries beginning with: HUM_AAA_PO_DEPT_XREF...

PRINTING A PURCHASE ORDER

Main Menu

1. Purchasing
2. Purchase Orders
3. Review PO Information
4. Print POs

Purchase Orders Print Page

1. Business Unit must be "HMCMP."
2. Enter purchase order number in "PO ID" field, or enter search criteria for more than one purchase order.
3. Click "Run."

Process Scheduler Request

1. Server Name should be left blank, or PSUNX.
2. Type must be "Web."
3. Format should be "PDF." (Mac users may want to try a different format if they have problems with PDF files.)
4. Click "OK."

Purchase Orders Print Page

1. Click on "Process Monitor."

Process List Page

1. Click "Refresh" until the "Run Status" of the document shows as "Success."
2. Click "Details" link to right of document.

Process Detail Page

1. Click "View Log/Trace."

View Log/Trace Page

1. Click on the PDF file and a printable copy of the PO will come up in a separated window.

REVIEWING PURCHASE ORDER INFORMATION

Main Menu

1. Purchasing
2. Purchase Orders
3. Review PO Information

Purchase Order – Takes you to the PO inquiry page to review order, header comments, chartfield information etc.

Activity Summary – This shows the original quantity/amount of the PO, the quantity/amount received, vouchered and matched. You can also access the voucher inquiry page from here.

PO Accounting Information Page – This shows all the accounting information of your PO.

Document Status - This shows all the documents related to this PO.

When the PO has been fully received and fully matched, the PO status will show COMPLETE; identifying that the order has been closed.

QUERIES

Main Menu

1. Reporting Tools
2. Queries
3. Query Viewer
4. In the "Query Name begins with" field, type in HUM_AAA_PO_DEPT and click Enter. All Department PO related queries will be listed. Specialized queries may be created upon request.