Requisition Tips V8.9

This document is intended to highlight some of the common mistakes/questions related to entering a PeopleSoft Requisition. The references are referring to the page number you can review in the PeopleSoft Requisitions Version 8.9 manual. The manual is available online at: http://www.uakron.edu/its/learning/training/docs/ReqV89.pdf

TIPS
1. Complete the **Category** field (page 3-5) to the best of your ability. This field is linked to the Buyer and your Department's budget. For a list of Categories and the respective Account Numbers, see the following: www3.uakron.edu/purchasing/CategoriesandAccounts.xls
2. Remember to always fill in the **Vendor** field (page 3-7.) If you cannot locate the Vendor through a search, use the Vendor ID 0000001342. If you use this ID number, be sure to enter the Vendor (and Vendor information) on the Comments page.
3. DO NOT **Hold** (page 3-11) a requisition unless you have a reason to do so. This is an optional step and should only be used with a business need. If you use the **Hold from processing** checkbox, you will not be able to print a requisition using the Quick Print Method (page 4-1) AND your requisition will not proceed to the next step in the Requisition Life Cycle.
4. Remember to use the Comments page (3-12.) You should be using the **ReqDeli** Standard comment, but if you are not you should be entering (at a minimum): ◘ Who to call with questions and extension ◘ Delivery location (building and office number) ◘ Zip + ◘ If you are working with an Invoice, the Invoice Number ◘ If you could not find the Vendor, the Vendor information
5. If you add an attachment to the requisition (Page 3-13) it may be modified or deleted up until the requisition is approved. Once approved, no changes may be made to the attachment. To modify the file, first delete the attachment and then make your changes and re-attach the file to the requisition.
6. When you are at the final steps, Approve Amounts, and you are on the Approval page (page 3-15) click on the **Save** button **ONCE**. Each time you click on the **Save** button a new entry, for the same requisition, will appear in the Approvers Worklist.
7. If you are unable to print a requisition using the Quick Print Method (page 4-1) check these two items: ◘ The requisition is not on **Hold** (page 3-11). ◘ You may need to configure Pop-Up Blocker in Internet Explorer. For instructions on resolving this problem refer to Page 4-5.

TIPS
8. If you realize that you need to adjust/make changes to a requisition **ANY TIME** after you have "Approved Amounts" (page 3-15) it is BEST to have your Approver "Recycle" the requisition back to you via the Worklist. If you make changes and resubmit by Approving Amounts (Saving) a new entry for the same requisition will appear in the Approvers Worklist. Only one entry can be opened and approved. Therefore, the "other" entry will appear to be "stuck." This will happen ANY TIME you change a requisition that has already been sent to the Approver. Whenever you click on the **Save** button (page 3-11) you generate a new entry for approval. This is also true if an Approver makes a change to somebody else's requisition. Most Approvers have Self-Approval for their requisitions, therefore, if an Approver makes a change the requisition automatically moves to the next step in the Requisition Life Cycle leaving the original requisition entry in their Worklist. The Approver will no longer be able to open the requisition for Approval because it has already been approved (by themselves!) The requisition will therefore seem to be "stuck."
9. The pages for entering requisitions can be customized by changing the tab order of fields, or choosing to completely remove a tab for those fields which are not used (Page D-1). You can also opt to remove (hide) fields that you do not wish to see in the Line Item area on the Requisition page. Suggested tab orders and hidden fields are listed for the Requisition and Requisition Defaults pages are also available at the following location: http://www.uakron.edu/its/learning/training/docs/CustomizeReqV89.pdf
10. It is possible to enter one PeopleSoft requisition with multiple speed charts for one line item (Page 3-20). Instructions on this process can also be found at the following location: http://www.uakron.edu/its/learning/training/docs/MultiSpeedChartsReq.pdf