

Table of Contents

Chapter 1 : Contact Information	1-1
PeopleSoft Contacts	1-1
PeopleSoft Web Sites.....	1-1
Purchasing Contacts.....	1-2
Chapter 2 : Requisition Overview.....	2-1
Methods of Purchasing	2-1
Requisitions Defined.....	2-3
Life Cycle of a Requisition.....	2-4
Chapter 3 : Adding a New Requisition	3-1
Adding a New Requisition.....	3-1
Starting Notes for Adding Requisitions	3-1
Information Needed for Completing a Requisition	3-1
Type 1: One Vendor, One SpeedChart	3-2
Saving Error Message.....	3-16
Type 2: One Vendor, Multiple SpeedCharts per Line Item.....	3-19
Type 3: One Vendor, Multiple Lines, Override SpeedChart per Line.....	3-24
Ending Notes for Adding Requisitions.....	3-28
Chapter 4 : Printing a Requisition.....	4-1
Method 1: Printing a Requisition from the Form Page.....	4-1
Method 2: Printing a Requisition using the Req Print Page	4-5
Part A: Creating a Run Control.....	4-5
Part B: Printing a Requisition	4-8
Chapter 5: Recall a Requisition	5-1
Part A: Recalling a Requisition.....	5-1
Part B: Modifying a Requisition Prior to Approval.....	5-3
Part C: Modifying a Requisition after Approval.....	5-5
Part D: Cancel a Requisition.....	5-6
Part E: Processing a Recycled Requisition (as the Requester)	5-7
Chapter 6 : Requisition Inquiry.....	6-1
Requisition Inquiry Page.....	6-1
Req Doc Status Inquiry Page	6-5
Chapter 7: How to Handle Invoices.....	6-1
Appendix A Adding a Requisition with One SpeedChart and Multiple Vendors	A-1
Appendix B Split all Lines of a Requisition to Multiple SpeedCharts	B-1
Appendix C Copy a Requisition.....	C-1
Appendix D Using the Customize Link	D-1
Appendix E Miscellaneous Notes	E-1
Appendix F Locating PeopleSoft Training and Documentation on the Web	F-1

Chapter 1 : Contact Information

PeopleSoft Contacts

Office	Contact Information	Function
Computer Help Desk	helpdesk@uakron.edu OR 330.972.6888	Answers general questions about PeopleSoft processes and non-PeopleSoft computer processes, opens work tickets for technicians, and assists with UANet password issues.
PeopleSoft Security	pssecurity@uakron.edu	Answers questions about your PeopleSoft security such as password and ID issues. Also assigns ID's and Passwords.
Purchasing Functional Lead	aroth1@uakron.edu	Answers specific business process questions about requisitions in PeopleSoft.
Software Training Services	pstrain@uakron.edu	Answers "how to" questions about the PeopleSoft processes outlined in this manual.

PeopleSoft Web Sites

Office	Web Site
Computer Help Desk	http://www.uakron.edu/its/hoss/helpdesk/index.php
PeopleSoft Security	http://www.uakron.edu/its/applications/security/index.php
Software Training Services	<p>Main Site: http://www.uakron.edu/its/learning/training/index.php</p> <p>PeopleSoft Training: http://www.uakron.edu/its/learning/training/PsoftV8.php</p> <p>Seminar Site: https://www.uakron.edu/seminars/index.php</p>
University of Akron's Department of Purchasing	http://www3.uakron.edu/purchasing/
University of Akron's PeopleSoft Version 8 Site	http://www.uakron.edu/its/peoplesoft8/peoplesoft.php

Purchasing Contacts

Below is a contact list for The Department of Purchasing. This list also includes a summary of the commodities that each buyer is associated with. This list is just a summary and does not include every category available on campus. This list is meant to be a guide to help direct you to the appropriate person.

Name	Contact Information	Position/Commodity
Gene Stephens	Ext. 7340	Director, Purchasing
Denise Cool	Ext. 6270	Associate Director, Purchasing Appraisal Services, Real Estate, Automobiles, Leased Vehicles, Outside Legal Counsel, Relocation Services, Lease/Rental Off Campus Facilities, Security Guards
Andy Roth	Ext. 7340	Associate Director, Purchasing PeopleSoft Functional Lead
Bill Jenkins	Ext. 6469	Assistant Director, Purchasing Construction, Energy Management Systems, Inspection Services, Architect/Engineering Services, Off-Campus Storage
Buyers and Assistants		
Matthew Beaven	Ext. 6268	Insurance
Vicki Collins	Ext. 5420	Assistant Buyer
Barbara Fuller	Ext. 6013	Assistant Buyer
Barbara Hayes	Ext. 2577	Assistant Buyer
Valoree Lee	Ext. 7340	Administrative Secretary
James Leonard	Ext. 6271	Audio Visual, Cable TV, Long Distance, Furniture, Library Supplies, Lease/Purchase Copiers, Off-Campus Mailing, Service and Maintenance Contracts, Paper, Printing Services & Equipment, Telephones, Vending Machines
Sue McPherson	Ext. 5423	Overnight Accommodations, Novelty Items, Advertising, Media, Performers, Awards, Books, Subscriptions, TV & Radio Broadcast, Catering, Delivery Services, Hospitality, Membership, Purchase for Resale, Travel
Timothy Neitz	Ext. 6267	Animals, Appliances, Art Work, Athletic Goods, Automobiles Services, Building Supplies, Chemicals, Cleaning and Custodial, Flowers, HVAC, Landscaping, Medical Equipment, Office Supplies, Plumbing Supplies, Uniforms
Al Radin	Ext. 8557	Computer Hardware, Computer Software, Computers, Computer Maintenance, Laboratory Equipment, Lease/Purchase/Rent Computer Equipment

Chapter 2 : Requisition Overview

Methods of Purchasing

The Department of Purchasing offers several different purchasing programs for use by the individual departments on campus. The method you use will vary depending on what you are trying to purchase. See the following table for details.

Method	Description
PeopleSoft Requisition	Use PeopleSoft whenever you are ordering from external Vendors (off-campus).
WebReq	<p>An online form that allows users to order items or services from on-campus “vendors.” For example: Computer Solutions, Physical Plant, Communications, and Printing Services. This process is also used for personal reimbursements.</p> <p>You must obtain access to use WebReq’s. This process is maintained by the Department of Purchasing. Go to the following url to obtain the access form: http://www3.uakron.edu/purchasing/forms/WEBREQApp.pdf</p> <p>To enter a WebReq (after you obtain access) go to the following url: http://www3.uakron.edu/purchasing/dreq/ocreq.phtml</p>
Prepaid Order Form	A form, available on the Department of Purchasing web site, which can be used to order books, subscriptions, memberships, hotels, and conference registrations. After the form is filled out, it can be mailed to Accounts Payable for payment.
University Contract (for use by all Departments)	University Contracts are negotiated and awarded by the Department of Purchasing. All University departments are able to utilize these contracts to procure any item associated with the contract. Place your order directly with the contract vendor and have the invoice sent directly to you for approval. Once you receive the invoice, verify that you received the goods or services. If you received the desired goods or services mark the invoice “OK to Pay”, sign the invoice, write down the SpeedChart (your old six digit “account code”) you wish to charge and forward the invoice to Accounts Payable for processing and payment. A list of vendors the university has contracts with can be found on the Department of Purchasing web site.

Method	Description
Blanket Purchase Order (for use by specified Department)	<i>Set up by the Department of Purchasing</i> and is processed through PeopleSoft. A blanket purchase order is when an agreement is reached with a Vendor for a certain period of time, and for a certain amount of money (pre-encumbered). The department can utilize the blanket purchase order when working with the vendor by sending an invoice directly to Accounts Payable.
Office Supply Requisition Form OR www.eway.com	A form, available on the Purchasing web site, which is used to order office supplies. After the form is filled out, it should be sent to Central Stores for processing. The items will be delivered directly to the department. If you prefer, there is also a web site to order office supplies and the url is www.eway.com . To set this process up, contact Tim Neitz in the Department of Purchasing.
University Credit Card (Visa Card)	The University Credit Card allows departments to purchase certain goods costing less than \$1,500. The cardholder will be expected to know and follow the guidelines for using the credit card.

Requisitions Defined

A **requisition** is a request for supplies, items, or services from one or several vendors. As outlined on the previous page there are several methods for requests of goods or services, and PeopleSoft is used for off-campus purchases.

There are many guidelines involved when making purchases on behalf of the University. The most important rule to remember is that all purchases (unless you are using another Purchasing Program) should be initiated with a requisition and must be approved by the authorized individual.

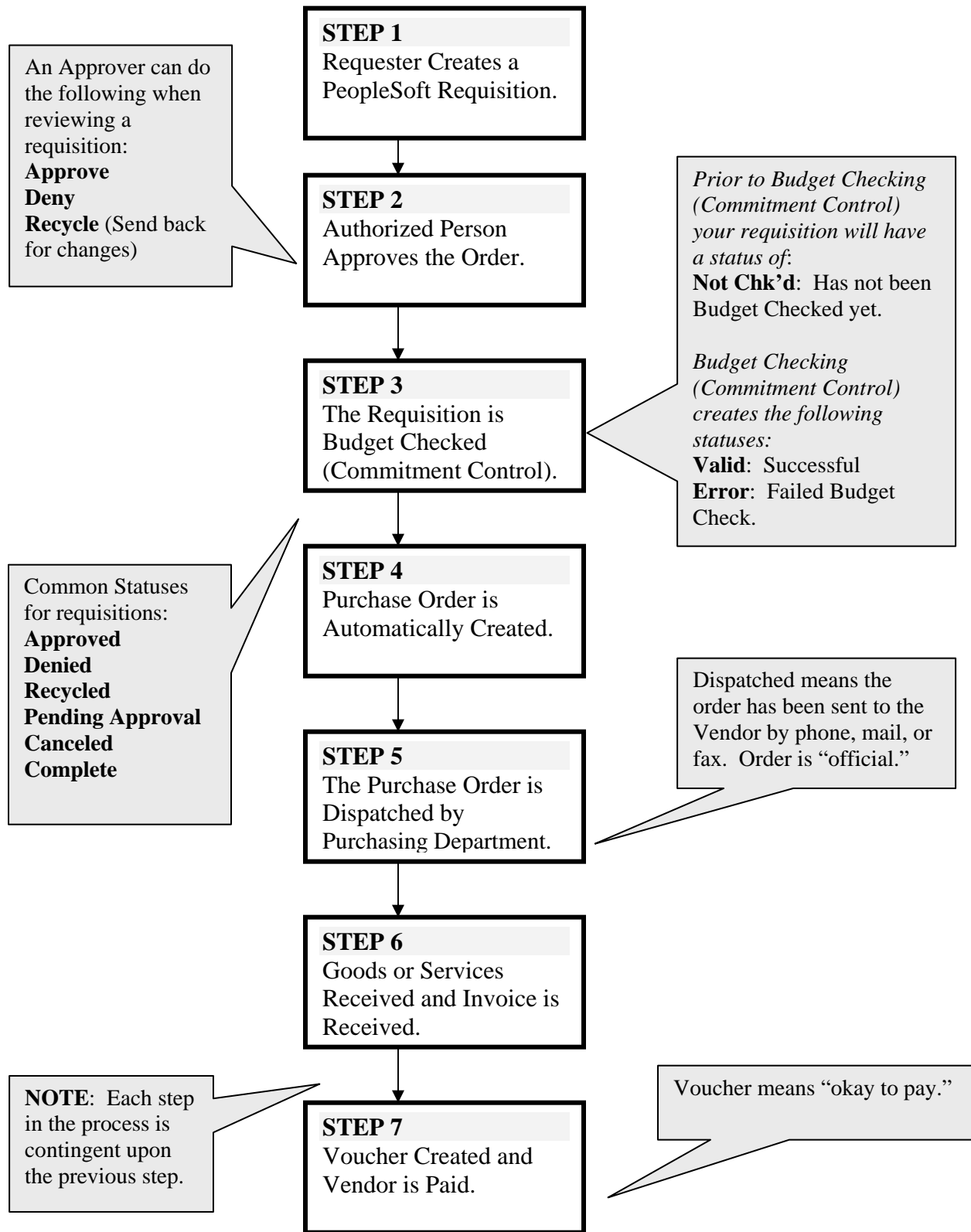
The Board of Trustees Guideline (3359-20-53) states the following:

“The director of purchasing is authorized to commit the university for all purchases of goods and services. Commitments by any other member of the faculty or staff are in direct violation of the guidelines established by the board. Commitments made outside of these guidelines are not binding on the university and invoices covering these commitments may not be honored.

Furthermore, university requisition forms are provided by the purchasing department and must be used for all purchases of goods or services. Completed requisitions are to be forwarded to the purchasing department for processing and should include an accurate description of the material or service desired, suggested vendors, approximate cost, required delivery data and location, account code to be charged, and authorized signatures.”

Please contact the Department of Purchasing if you have any questions regarding this guideline or if you have general questions about what purchasing program should be used.

Life Cycle of a Requisition



Chapter 3 : Adding a New Requisition

Adding a New Requisition

Starting Notes for Adding Requisitions

Listed below are some general guidelines that you will want to follow when adding a requisition in PeopleSoft 8.

- Training is required for new PeopleSoft Requisition Users. In training you will receive a security form to fill out. If you have further questions about security, contact the Security Administrator at pssecurity@uakron.edu.
- Do not use the **Back** button on the Internet Explorer Toolbar. Use the buttons found on the PeopleSoft page to move from page to page.
- System required fields are indicated by an asterisk (*) next to the field name.
- Many pages will not refresh every time you leave a field. You may have to use the **Refresh** button or go to a new page for a field to become active.
- For information about Budget Checking (Commitment Control) Errors see Appendix E.
- For information about requisitions containing more than 20 line items see Appendix E.

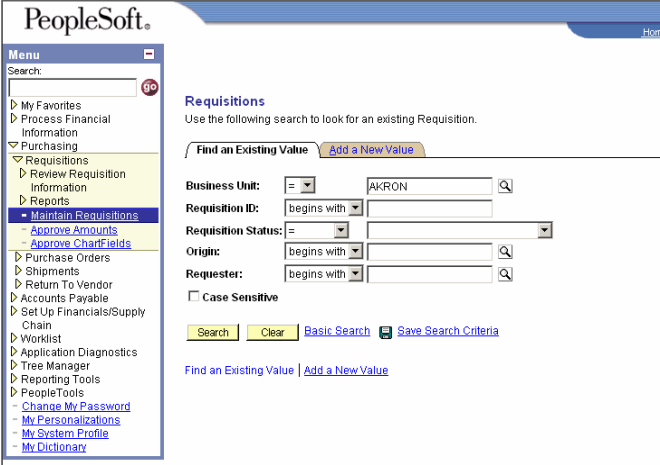
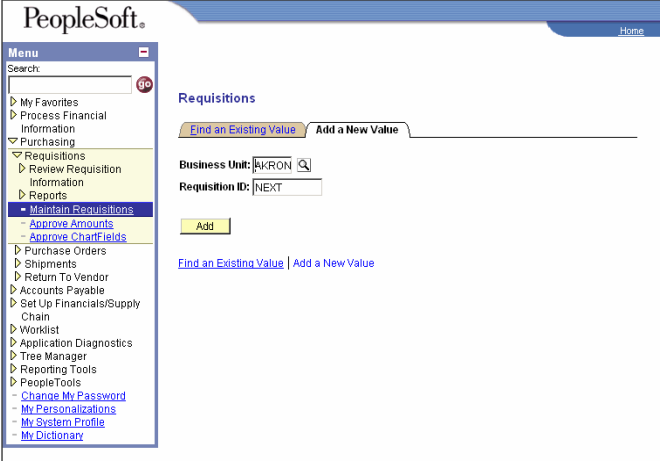
Information Needed for Completing a Requisition

Listed below is a list of information that you will need in order to successfully complete a requisition in PeopleSoft. The list is in the order to which you will enter information for your PeopleSoft Requisitions.

1. **What are you buying:** Description, Quantity, Unit of Measure, Category, and Price
2. **Vendor** Name or Number
3. **Due Date** for the items
4. **SpeedChart:** 6-digit account code (SpeedType in Version 7)
5. **Comments:** The ReqDeli Standard Comment (contact and delivery information) as well as anything you want to tell the Buyer or Vendor.

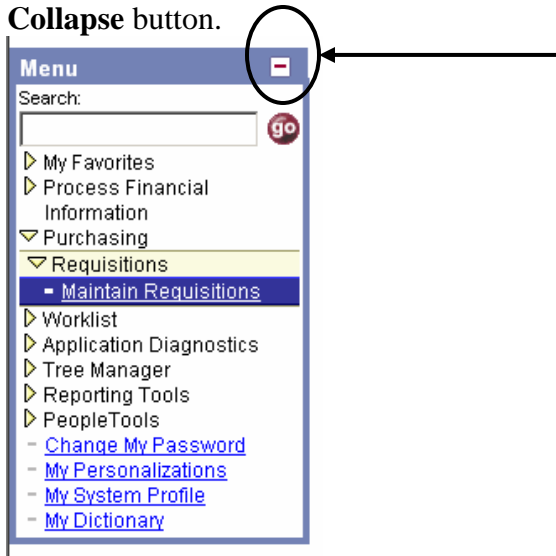
Type 1: One Vendor, One SpeedChart

Use this procedure to enter a PeopleSoft requisition when you are using one Vendor and one SpeedChart for all line items.

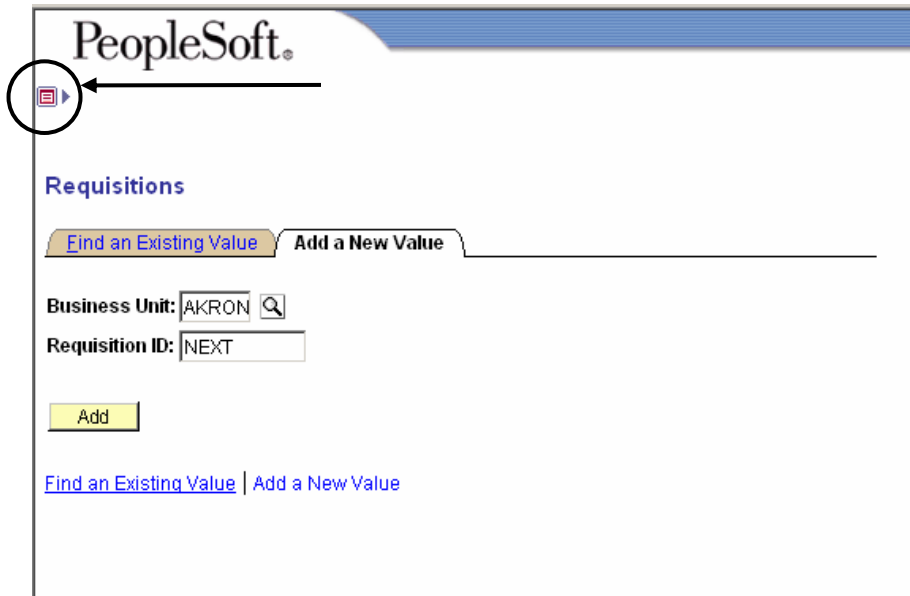
What you do	What happens
<p>1. From the main menu, choose: Purchasing, Requisitions, Maintain Requisitions</p>	<p>The Find an Existing Value page displays.</p> 
<p>2. Click on the Add a New Value link or on the Add a New Value folder tab.</p>	<p>The Add a New Value page displays.</p> 

What you do	What happens
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TIP: To allow more working room with the page, collapse the main menu by clicking on the **Collapse** button.



To open the menu again, click on the **Expand** button.



What you do	What happens
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3. Click on the **Add** button.

The Form page displays.

The screenshot shows the PeopleSoft Requisition Form page. At the top, there is a navigation bar with 'Home', 'Worklist', and 'Add to Favorites'. Below this, the 'Form' tab is active, and the 'Schedule' sub-tab is selected. The main form area contains the following information:

- Unit:** AKRON **Req ID:** NEXT **Req Date:** 10/25/2004 **Origin:** ONL
- Requester:** ENJ50PD (Dungjen, Paula Mech Eng.) **Hold From Further Processing**
- Status:** Pending **Budget Status:** Not Chk'd **Accounting Date:** 10/25/2004 **Currency:** USD Dollar

A table with the following columns is displayed:



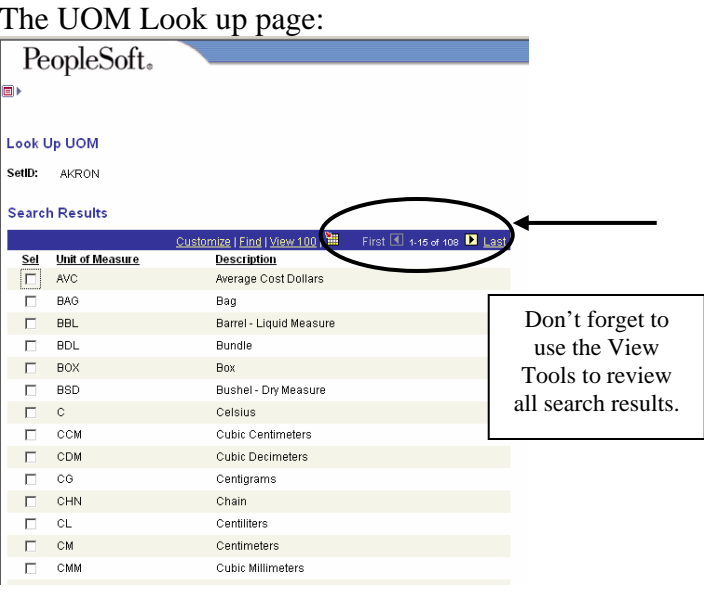
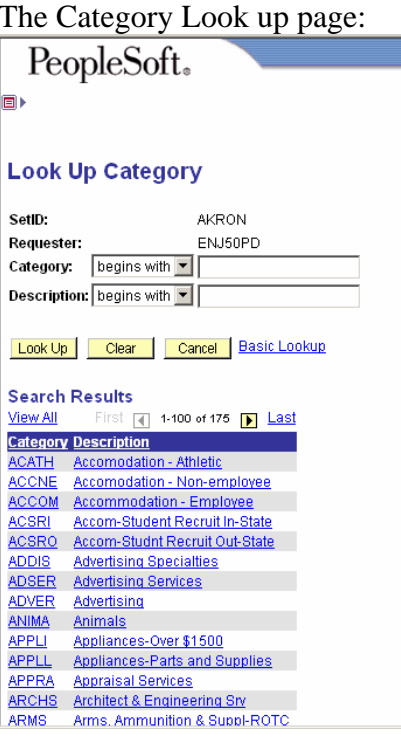
Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1			0.0000			0.00000	RECEIV	Active



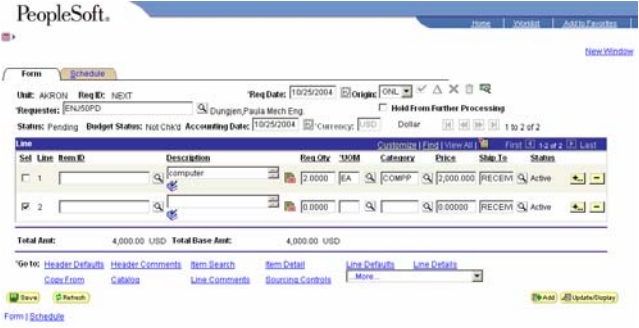

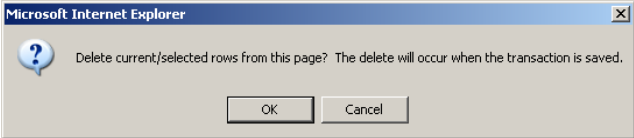
Below the table, the following summary information is shown:

Total Amt: 0.00 USD **Total Base Amt:** 0.00 USD

Navigation links include: [Header Defaults](#), [Header Comments](#), [Item Search](#), [Item Detail](#), [Line Defaults](#), [Line Details](#), [Copy From](#), [Catalog](#), [Line Comments](#), [Sourcing Controls](#), and [...More...](#)

Buttons at the bottom include: **Save**, **Refresh**, **Add**, and **Update/Display**.

What you do	What happens
<p>4. Enter the information for the items you are ordering.</p> <p>Note: You can use the Tab key to move from field to field or you can click in the field with the mouse.</p> <ul style="list-style-type: none"> ■ Item ID: Leave blank. You can remove this field from the page for easier requisition entry. See Appendix D for details. ■ Description: Enter a <i>specific</i> description of the item such as Item ID, ID#, page, SKU#, Catalog #, etc. ■ Req Qty: Requisition Quantity ■ UOM: Unit of Measure. Use the Look Up  button to return a Unit of Measure list. Locate the UOM and check the box and click on the Return button. ■ Category: Use the Look Up  button to return category list. Locate the Category and click on any link of the Category to select it and return to the Form page. This field is linked to the Buyer and the Departments Budget. ■ Price: Price per Item ■ Ship To: Defaults, should not be adjusted. 	<p>The UOM Look up page:</p>  <p>The Category Look up page:</p> 

What you do	What happens
<p>5. To enter additional items to this requisition, click on the Add  button at the end of Line 1.</p> <p>Enter the number of rows that you want added to the requisition and select OK. If needed, you can add additional rows later in the process.</p>	<p>The Explorer User Prompt box displays.</p>  
<p>6. To delete an item, go to the end of the line and click on the Delete Row  button.</p> <p>Click on the OK button to delete the selected row.</p>	<p>The Microsoft Internet Explorer box returns.</p> 

What you do	What happens
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7. After you have entered the line items, click on the **Header Defaults** link found at the bottom of the Form page.

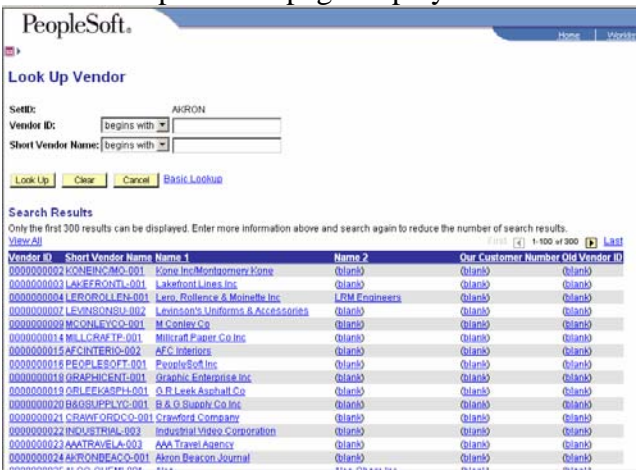
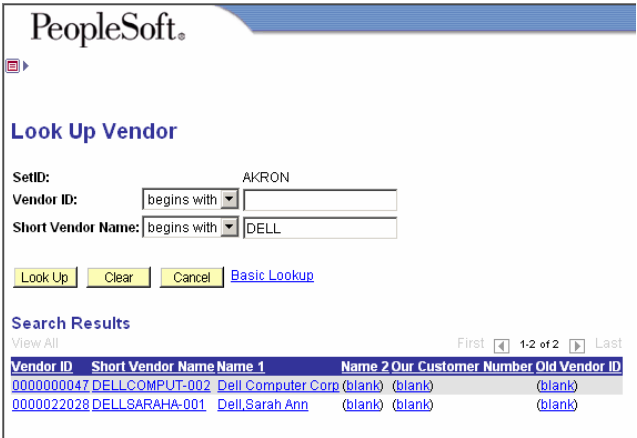
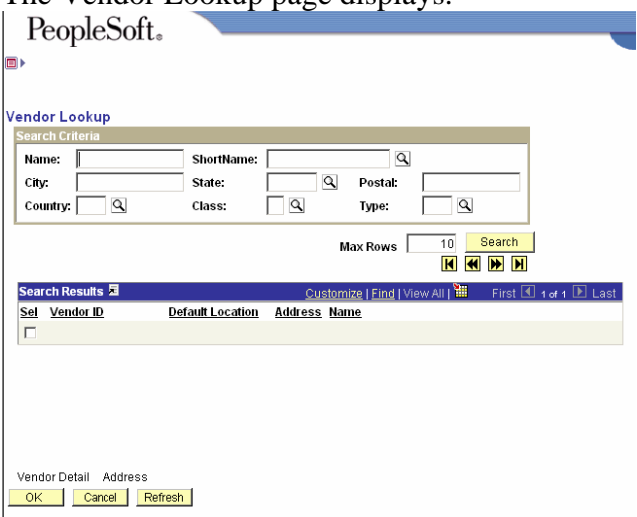
The Header Defaults page displays. This is where you will enter the Vendor, Due Date, and SpeedChart.

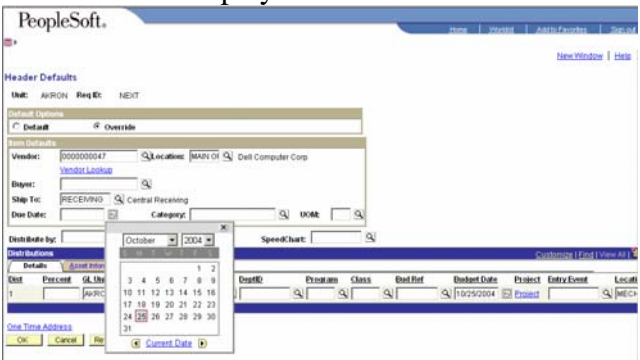
8. Verify that the **Override** button (in the Default Options frame) is selected. This will apply the data on this page to all lines of the requisition.

Note: You can use the **Tab** key to move from field to field or you can click in the field with the mouse.

9. In the **Vendor** field, enter the Vendor ID number. *This field cannot be left blank.*

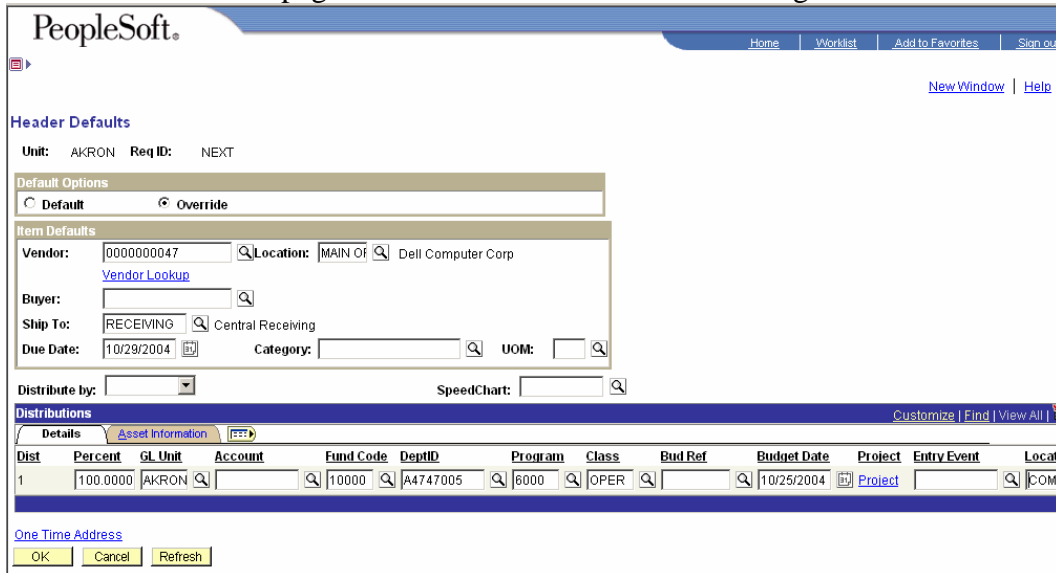
If the Vendor is unknown or if the Vendor is not contained within the PeopleSoft database, use 0000001342 (Department of Purchasing). A requisition with no Vendor ID will not be built into a purchase order, thus delaying your order.

What you do	What happens																																																																																																																		
<p>10. Looking up a Vendor, Option 1: If you do not know the Vendor ID, click on the Look Up Vendor button.</p> <p>In the Short Vendor Name field, enter the first few letters of the Vendor name and click on the Look Up button.</p> <p>Locate the Vendor, and click on any of the fields (links) to select that Vendor.</p>	<p>The Look Up Vendor page displays.</p>  <p>Search Results</p> <table border="1"> <thead> <tr> <th>Vendor ID</th> <th>Short Vendor Name</th> <th>Name 1</th> <th>Name 2</th> <th>Our Customer Number</th> <th>Old Vendor ID</th> </tr> </thead> <tbody> <tr><td>000000002</td><td>KONENCOM-001</td><td>Kone Inc/Montgomery Kone</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000003</td><td>LAFFRONTL-001</td><td>Lakefront Lines Inc</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000004</td><td>FERONQLLPH-001</td><td>Fern, Bulence & Mainette Inc</td><td>FM Footwear</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000007</td><td>LEVONSONSU-002</td><td>Levinson's Uniforms & Accessories</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000009</td><td>MCONLEVCO-001</td><td>M Conlev Co</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000014</td><td>MILLCRAFT-001</td><td>Milcraft Paper Co Inc</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000015</td><td>AFCINTERIO-002</td><td>AFC Interiors</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000018</td><td>PEOPLESOFT-001</td><td>PeopleSoft Inc</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000019</td><td>GRAPHICENTR-001</td><td>Graphic Enterprise Inc</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000019</td><td>OPLFEKASPH-001</td><td>O.P.Lee Asphalt Co</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000020</td><td>B&G SUPPLY-001</td><td>B & G Supply Co Inc</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000021</td><td>CRAWFORDCO-001</td><td>Crawford Company</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000022</td><td>INDUSTRIAL-003</td><td>Industrial Video Corporation</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000023</td><td>AAATRAVELA-003</td><td>AAA Travel Agency</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>000000024</td><td>AKRONBEACO-001</td><td>Akron Beacon Journal</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> </tbody> </table>  <p>Search Results</p> <table border="1"> <thead> <tr> <th>Vendor ID</th> <th>Short Vendor Name</th> <th>Name 1</th> <th>Name 2</th> <th>Our Customer Number</th> <th>Old Vendor ID</th> </tr> </thead> <tbody> <tr><td>000000047</td><td>DELLCOMPUT-002</td><td>Dell Computer Corp</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> <tr><td>0000022028</td><td>DELLSARAH-001</td><td>Dell, Sarah Ann</td><td>(blank)</td><td>(blank)</td><td>(blank)</td></tr> </tbody> </table>	Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID	000000002	KONENCOM-001	Kone Inc/Montgomery Kone	(blank)	(blank)	(blank)	000000003	LAFFRONTL-001	Lakefront Lines Inc	(blank)	(blank)	(blank)	000000004	FERONQLLPH-001	Fern, Bulence & Mainette Inc	FM Footwear	(blank)	(blank)	000000007	LEVONSONSU-002	Levinson's Uniforms & Accessories	(blank)	(blank)	(blank)	000000009	MCONLEVCO-001	M Conlev Co	(blank)	(blank)	(blank)	000000014	MILLCRAFT-001	Milcraft Paper Co Inc	(blank)	(blank)	(blank)	000000015	AFCINTERIO-002	AFC Interiors	(blank)	(blank)	(blank)	000000018	PEOPLESOFT-001	PeopleSoft Inc	(blank)	(blank)	(blank)	000000019	GRAPHICENTR-001	Graphic Enterprise Inc	(blank)	(blank)	(blank)	000000019	OPLFEKASPH-001	O.P.Lee Asphalt Co	(blank)	(blank)	(blank)	000000020	B&G SUPPLY-001	B & G Supply Co Inc	(blank)	(blank)	(blank)	000000021	CRAWFORDCO-001	Crawford Company	(blank)	(blank)	(blank)	000000022	INDUSTRIAL-003	Industrial Video Corporation	(blank)	(blank)	(blank)	000000023	AAATRAVELA-003	AAA Travel Agency	(blank)	(blank)	(blank)	000000024	AKRONBEACO-001	Akron Beacon Journal	(blank)	(blank)	(blank)	Vendor ID	Short Vendor Name	Name 1	Name 2	Our Customer Number	Old Vendor ID	000000047	DELLCOMPUT-002	Dell Computer Corp	(blank)	(blank)	(blank)	0000022028	DELLSARAH-001	Dell, Sarah Ann	(blank)	(blank)	(blank)
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000000047	DELLCOMPUT-002	Dell Computer Corp	(blank)	(blank)	(blank)																																																																																																														
0000022028	DELLSARAH-001	Dell, Sarah Ann	(blank)	(blank)	(blank)																																																																																																														
<p>11. Looking up a Vendor, Option 2: If you do not know the Vendor ID, click on the Vendor Lookup link.</p> <p>Enter search criteria and click on the Search button.</p> <p>Locate the Vendor, and then click in the Sel checkbox. Click on the OK button.</p>	<p>The Vendor Lookup page displays.</p>  <p>Search Results</p> <table border="1"> <thead> <tr> <th>Sel</th> <th>Vendor ID</th> <th>Default Location</th> <th>Address</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Vendor Detail Address</p> <p>OK Cancel Refresh</p>	Sel	Vendor ID	Default Location	Address	Name	<input type="checkbox"/>																																																																																																												
Sel	Vendor ID	Default Location	Address	Name																																																																																																															
<input type="checkbox"/>																																																																																																																			

What you do	What happens
<p>12. The Header Defaults page returns again.</p> <p>Enter a realistic due date for the item(s) in the Due Date field. You can click on the Choose a Date button to return a calendar for easy date selection.</p>	<p>The Calendar displays.</p> 
<p>13. In the SpeedChart field, enter the department's 6-digit Account Code</p> <p>14. Click on the Refresh button to populate the required Chartfield information.</p>	

15. **Note:** You do not need to enter any additional information on this page. If you enter information into the blank fields, your requisition may error and not move to the next step in the Requisition Life Cycle.

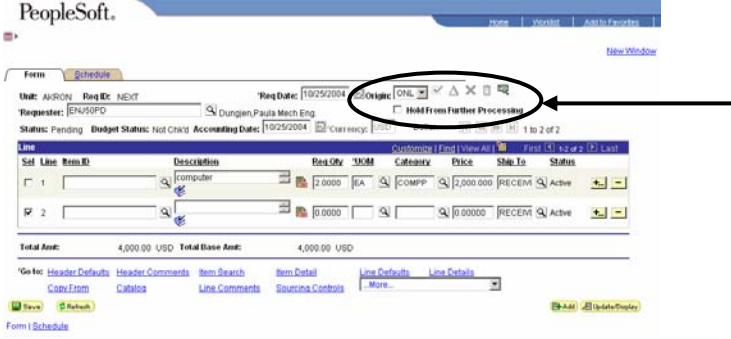
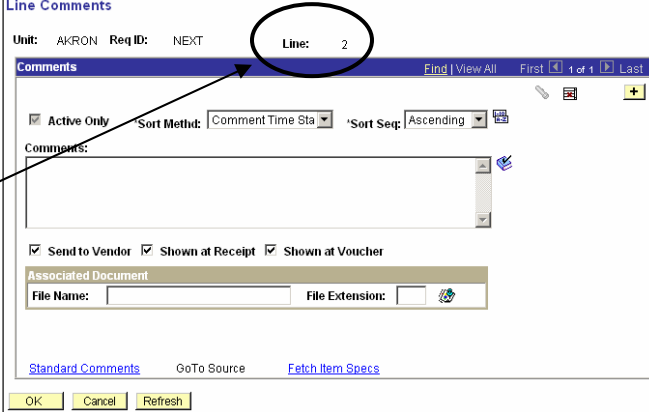
The Header Defaults page should look similar to the following:



What you do	What happens																																																							
<p>16. After you have entered the header default information (Vendor, SpeedChart, and Location), click on the OK button.</p> <p>Click on the Mark All link to activate the Apply column for all fields.</p> <p>Note: The result of clicking on the Mark All link will be a checkmark in all checkboxes in the Apply column.</p> <p><i>If you do not follow this step correctly, you will not be able to save the requisition.</i></p> <p>Click on the OK button to continue.</p>	<p>The following page returns:</p> <p>Retrofit field changes to "all" existing requisition lines/schedules/distributions.....</p> <p>Unit: AKRON Req ID: NEXT</p> <p>For the distribution specific defaults, # Select 'Apply' to apply changes to the Distrib Line value. For example, if you select Apply for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition. # Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.</p> <p><input checked="" type="checkbox"/> Mark All <input type="checkbox"/> Unmark All</p> <table border="1"> <thead> <tr> <th>Apply</th> <th>Distrib Line</th> <th>Field Name</th> <th>Field Value</th> <th>Apply to All Distribs</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>Vendor</td> <td>0000001342</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Location</td> <td>MAIN</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Ship To</td> <td>RECEIVING</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Percent</td> <td>100</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>GL Unit</td> <td>AKRON</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Fund Code</td> <td>10000</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Dept</td> <td>A4756002</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Program</td> <td>6000</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Class</td> <td>OPER</td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Budget Date</td> <td>2004-11-30</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh"/></p>	Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs	<input type="checkbox"/>		Vendor	0000001342		<input type="checkbox"/>		Location	MAIN		<input type="checkbox"/>		Ship To	RECEIVING		<input type="checkbox"/>	1	Percent	100		<input type="checkbox"/>	1	GL Unit	AKRON	<input type="checkbox"/>	<input type="checkbox"/>	1	Fund Code	10000	<input type="checkbox"/>	<input type="checkbox"/>	1	Dept	A4756002	<input type="checkbox"/>	<input type="checkbox"/>	1	Program	6000	<input type="checkbox"/>	<input type="checkbox"/>	1	Class	OPER	<input type="checkbox"/>	<input type="checkbox"/>	1	Budget Date	2004-11-30	<input type="checkbox"/>
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<input type="checkbox"/>	1	Class	OPER	<input type="checkbox"/>																																																				
<input type="checkbox"/>	1	Budget Date	2004-11-30	<input type="checkbox"/>																																																				

17. The Form page displays again.

The screenshot shows the PeopleSoft Requisition Form page. At the top, there are navigation links: Home, Worklist, Add to Favorites, and a New Window button. The form header includes: Unit: AKRON, Req ID: 0000018996, Req Date: 10/26/2004, Origin: ONL, and a checkbox for 'Hold From Further Processing'. The requester is listed as 'ENJ50PD' with the name 'Dungjen, Paula Mech Eng.'. The status is 'Approved', Budget Status is 'Not Chkd', Accounting Date is 10/26/2004, and Currency is USD. Below the header is a table with columns: Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, and Status. Two lines are visible: Line 1 for 'laptop computer' and Line 2 for 'software xyz'. At the bottom, there are summary fields for 'Total Amt' and 'Total Base Amt', both at 2,299.00 USD. Navigation buttons like Save, Return to Search, Next in List, Previous in List, Refresh, Add, and Update/Display are also present.

What you do	What happens
<p>18. At this point in the process, you have entered enough data to save the requisition and hold it from moving to the next step in the process.</p> <p>You can hold the requisition by activating (place a check mark) the Hold from Processing option. You must save the requisition before leaving and make note of the Requisition ID for future reference. You can recall the requisition at a later time and add, remove, or change information. At that time, uncheck this option and resave to move to the next step in the Requisition Life Cycle.</p>	<p>The Hold From Further Processing checkbox is circled.</p>  <p>The screenshot shows the 'Form Schedule' page in PeopleSoft. At the top right, there are several icons, including a checkbox labeled 'Hold From Further Processing' which is circled in red. Below this is a table with columns: Sel, Line, Item ID, Description, Req Qty, UOM, Category, Price, Ship To, Status. Line 1 is selected. At the bottom, there are buttons for 'Save' and 'Publish'.</p>
<p>19. To add comments per individual line, click in the Sel column for that line item (put a checkmark in the box) and click on the Line Comments link at the bottom of the page. The last box checked is the line selected.</p> <p>Note: Be sure to verify the Line number so that the comment is associated with the correct line.</p> <p>Select the OK button to return.</p>	<p>The Line Comments page returns.</p>  <p>The screenshot shows the 'Line Comments' page. At the top, it says 'Unit: AKRON Req ID: NEXT' and 'Line: 2' is circled in red. Below this is a 'Comments' section with a text area. There are checkboxes for 'Active Only', 'Send to Vendor', 'Shown at Receipt', and 'Shown at Voucher'. At the bottom, there are buttons for 'OK', 'Cancel', and 'Refresh'.</p>

What you do	What happens
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20. To add comments to the requisition, click on the **Header Comments** link.

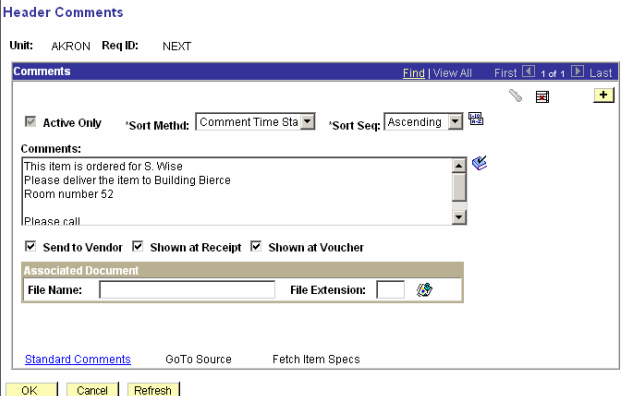

The Header Comments page displays.

21. All requisitions should have the **ReqDeli** Standard Comment added. This comment is a predefined entry that will provide you with a template for delivery and contact information.

To do this, click on the **Standard Comments** link.

- 22. In the **Std Type** field, enter REQ.
- 23. In the **Comment ID** field, enter DELI.
- 24. Click on the **OK** button.

The Standard Comments page displays.

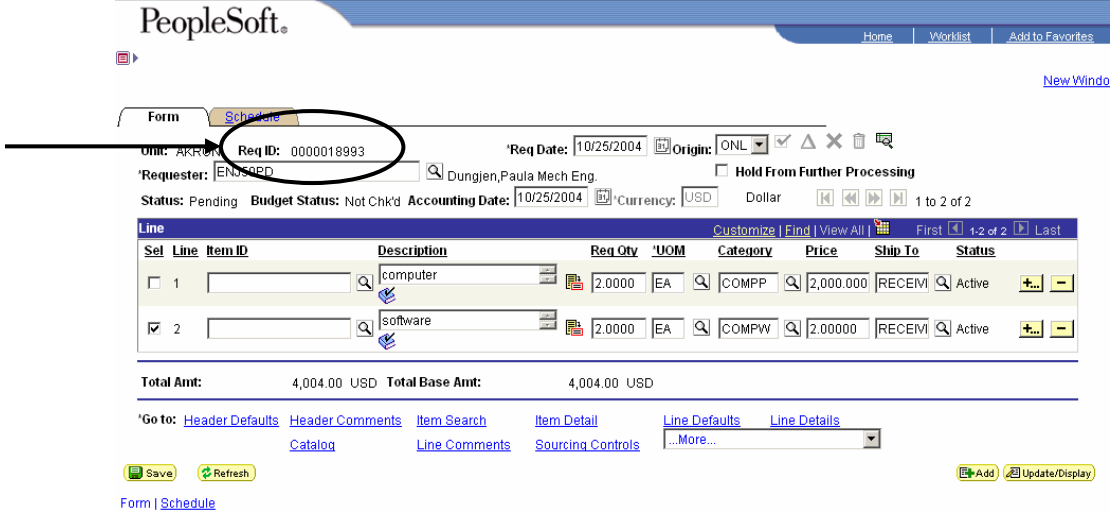
What you do	What happens
<p>25. Read the template and fill in your information where applicable.</p> <p>26. Some examples of when you would add additional free-form Comments are:</p> <ul style="list-style-type: none"> ■ What attachments are being sent to Purchasing. ■ Vendor information if not found in PeopleSoft. ■ Invoice number if entering an invoice <p>27. Click on the OK button.</p>	<p>The Comments page displays with the template.</p> 
<p>28. If you want to add additional comments in a new row, click on the Add a new row  button.</p> <p>You would add new rows if you want comments to be directed to different people. For example, row one comment (delivery and contact information) is intended to print for the Vendor and on the Receipt (Send to Vendor, Shown at Receipt checkboxes active) and row two's comment is intended only for the Vendor (only the Send to Vendor checkbox is marked).</p>	

What you do	What happens
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29. The Form page displays again.

To save the requisition, click on the **Save** button.

The Requisition ID number will display in the top left corner of the Form page.



Note: To print the requisition from this page, see Chapter 4, Method 1 for details.

--- Initiating the Workflow Process--- (must be done on every requisition)	
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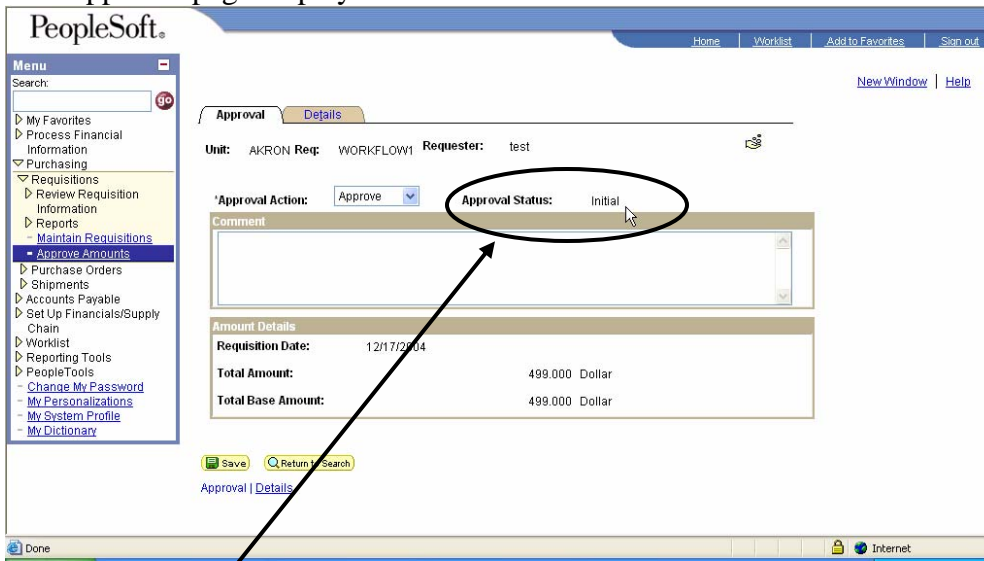
30. Using the main menu choose:

**Purchasing,
Requisitions,
Approve Amounts**

Note: If you collapsed the main menu, you will have to use the **Expand Menu** button to open the main menu again.

What you do	What happens
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31. The Approval page displays.



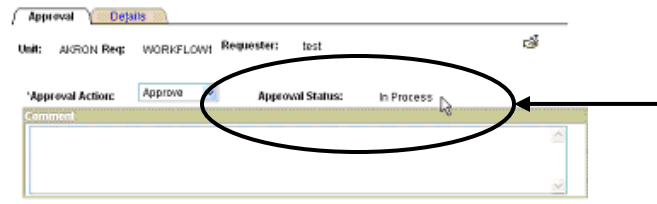
The **Approval Status** field will be Initial.

32. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process”** if you are not an approver.

The status will change to **“Complete”** if you are an approver or if your requisition is under \$500 and you have the limited authority classification.

The Approval Status field updates.

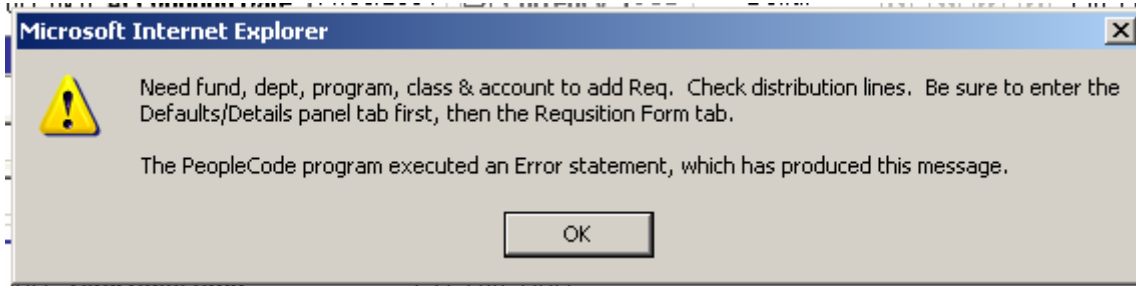


33. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).

Saving Error Message

If you did not follow the steps outlined, specifically step 17 on page 3-10, you will get an error message that will prevent you from saving the requisition.

The error message is as follows:



If you see this message follow the steps outlined below.

What you do	What happens
<p>1. Click on the OK button.</p>	<p>The Form page displays.</p>
<p>2. Click on the Header Defaults link.</p>	<p>The Header Defaults page displays.</p>
<p>3. Re-enter the SpeedChart in the SpeedChart field.</p> <p>Click on the OK button.</p>	<p></p>

What you do	What happens
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4. The following page displays.

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Unit: AKRON Req ID: NEXT

For the distribution specific defaults, Select 'Apply' to apply changes to the Distrib Line value. For example, if you select Apply for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition. Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.

Mark All Unmark All

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Vendor	0000000047	
<input type="checkbox"/>		Location	MAIN OFF	
<input type="checkbox"/>		Ship To	RECEIVING	
<input type="checkbox"/>		Due Date	2004-12-09	
<input type="checkbox"/>	1	Percent	100	
<input type="checkbox"/>	1	GL Unit	AKRON	<input type="checkbox"/>
<input type="checkbox"/>	1	Fund Code	10000	<input type="checkbox"/>
<input type="checkbox"/>	1	Dept	A4701001	<input type="checkbox"/>
<input type="checkbox"/>	1	Program	6000	<input type="checkbox"/>
<input type="checkbox"/>	1	Class	OPER	<input type="checkbox"/>

OK Cancel Refresh

5. Click on the **Mark All** link (circled above).

Note: The result of clicking on the **Mark All** link will be a checkmark in all checkboxes in the **Apply** column.

Click on the **OK** button.

The Form page displays again.

Form | Schedule

Unit: AKRON Req ID: NEXT Req Date: 11/30/2004 Origin: W

Requester: PUT12AR Robj,Andy Hold From Further Processing

Status: Pending Budget Status: Not Chkd Accounting Date: 11/30/2004 Currency: USD Dollar 1 to 2 of 2

Line	Description	Req Qty	UOM	Category	Price	Ship To	Status
<input checked="" type="checkbox"/>	example 1	5.0000	EA	COMPW	200.0000	RECEM	Active
<input checked="" type="checkbox"/>	example 2	1.0000	EA	COMPW	175.0000	RECEM	Active

Total Amt: 1,175.00 USD Total Base Amt: 1,175.00 USD

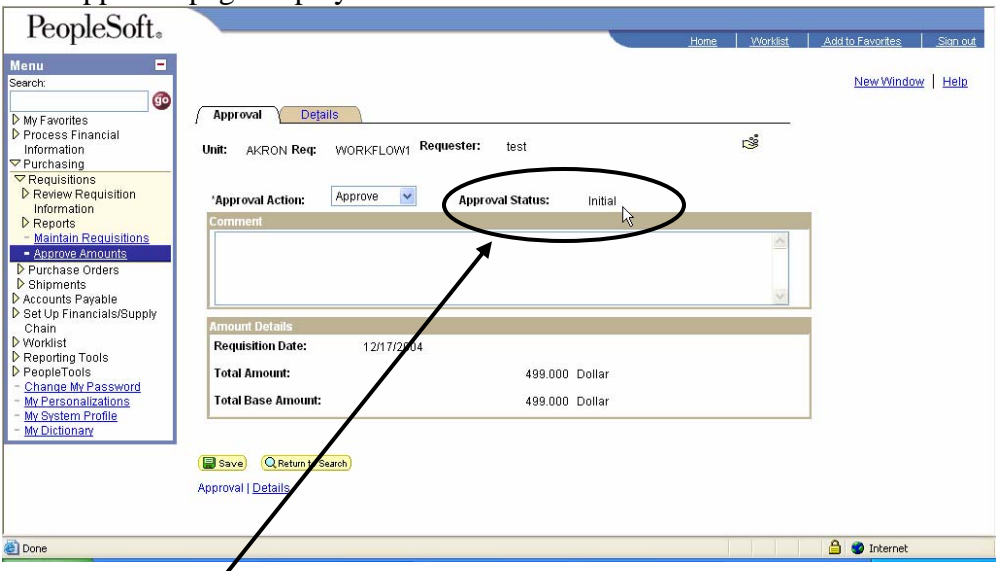
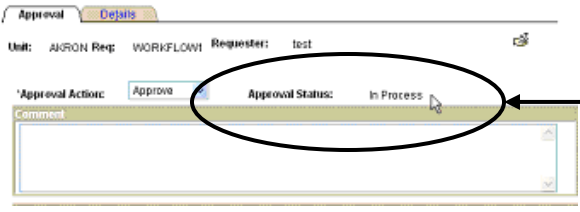
Go To: Header Defaults Header Comments Item Search Item Detail Line Defaults Line Details
Copy From Catalogue Line Comments Source Controls More...

Save Print Refresh Add Update/Display

6. Click on the **Save** button again.

7. Using the main menu choose:
Purchasing,
Requisitions,
Approve Amounts

Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.

What you do	What happens
<p>8. The Approval page displays.</p>  <p>The Approval Status field will be Initial.</p>	
<p>9. Click on the Save Button.</p> <p>The Approval Status of your requisition will change to “In Process” if you are not an approver.</p> <p>The status will change to “Complete” if you are an approver or if your requisition is under \$500 and you have the limited authority classification.</p>	<p>The Approval Status field updates.</p> 
<p>10. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).</p>	

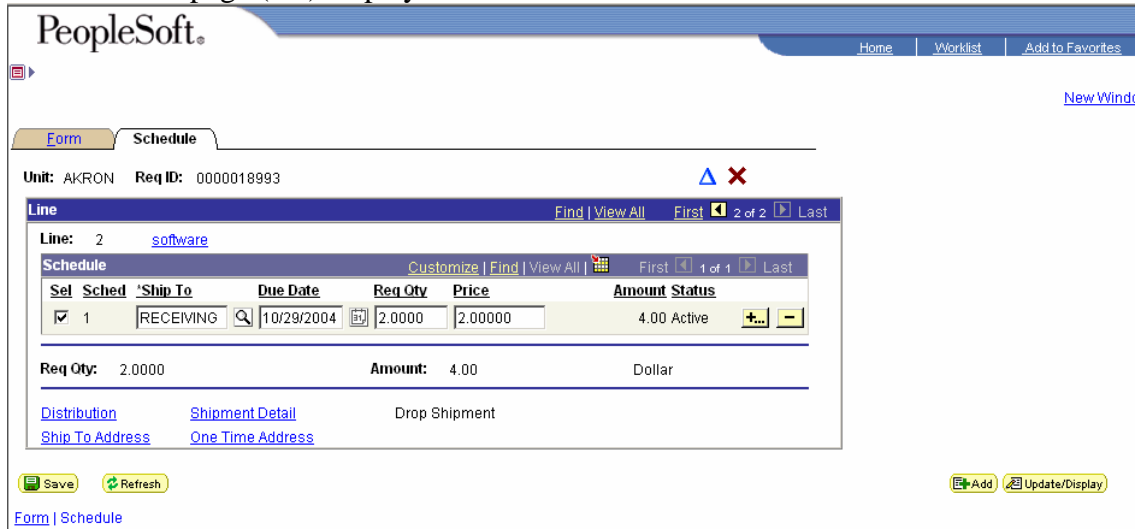
Type 2: One Vendor, Multiple SpeedCharts per Line Item

Use this procedure when you need to enter one PeopleSoft requisition and split the charges of one line to multiple SpeedCharts.

What you do	What happens
1. Follow the steps for Type 1 requisitions.	A requisition is entered.

2. Click on the **Schedule** tab or on the **Schedule** link at the bottom of the page.

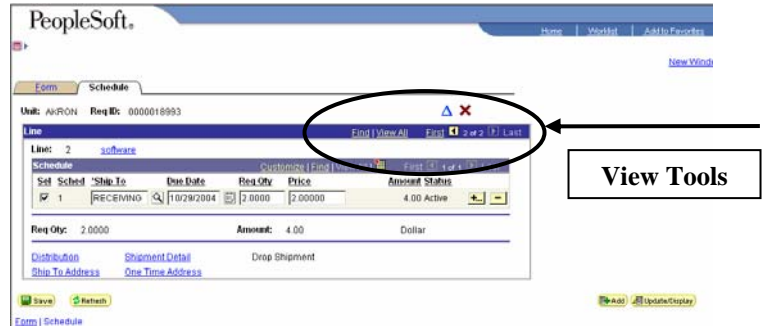
The Schedule page (tab) displays.



3. Click in the **Sel** column for the line item that you need to make a SpeedChart adjustment to.

To move between line items, use the **Show next row** and **Show previous row** buttons by using the View Tools. You may also click on the **View All** link to view all the lines of your requisition at one time.

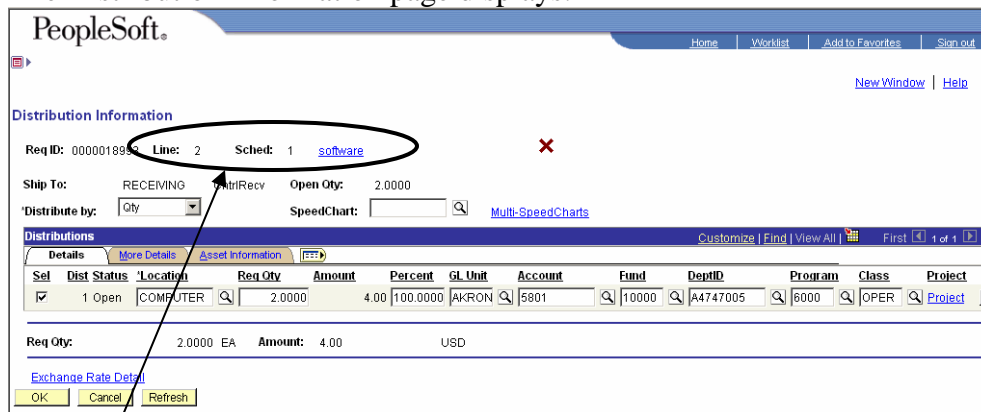
The Sel field for the item is marked.



What you do	What happens
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4. Click on the **Distribution** link below the selected line item.

The Distribution Information page displays.

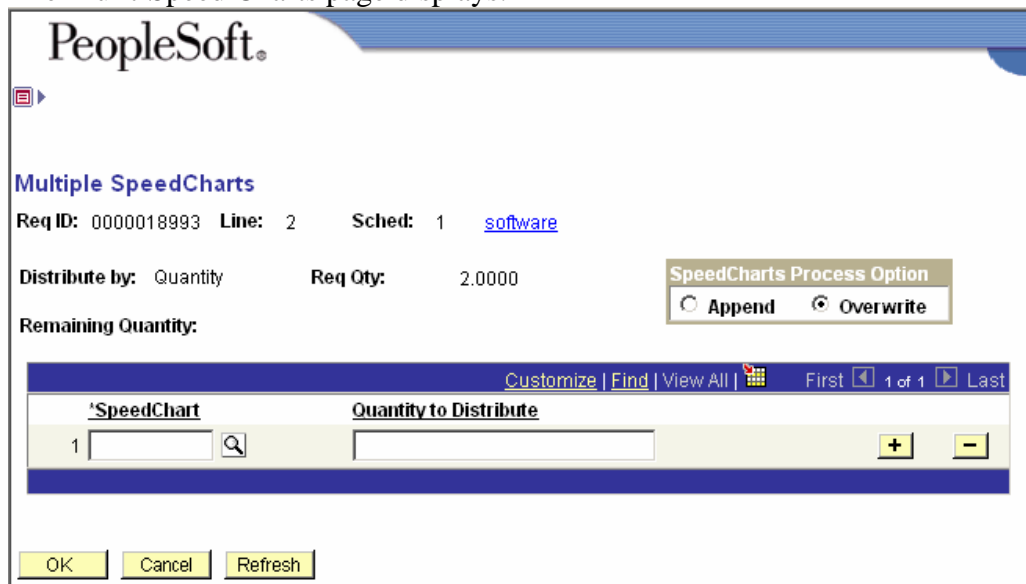



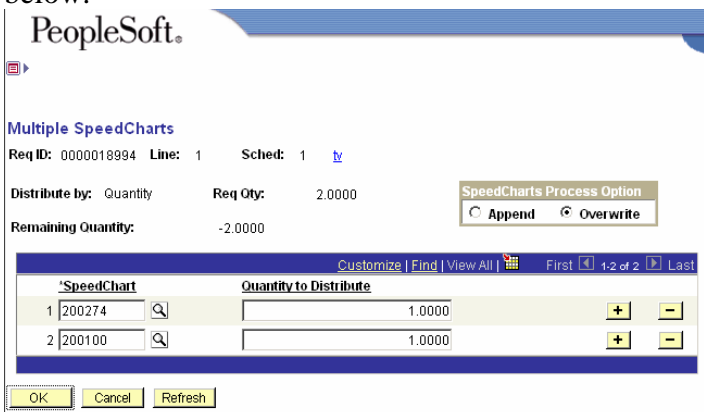
Note: Verify that the correct line item was selected by looking at the top of the Distribution Information page.

The default distribution method is by Quantity (Qty) however, you may change the **Distribute by** value to Amount (Amt) if needed.

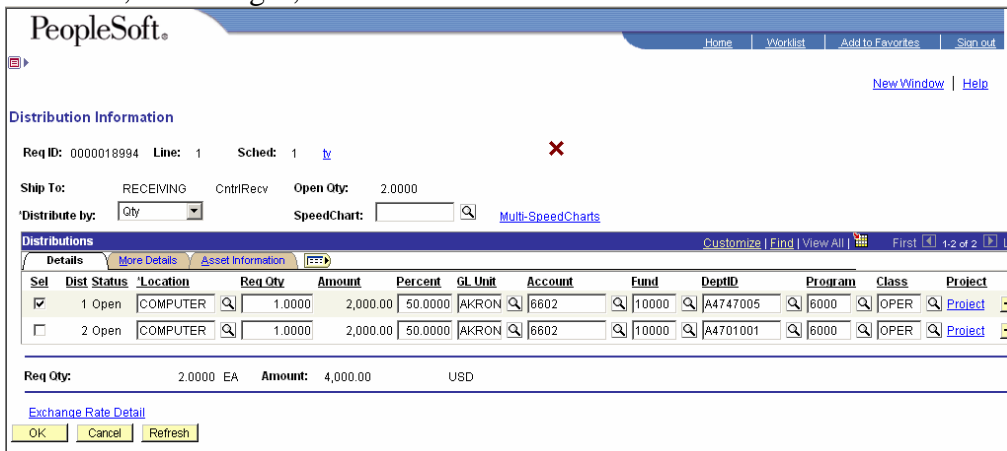
5. Click on the **Multi-SpeedCharts** link.

The Mult-Speed Charts page displays.



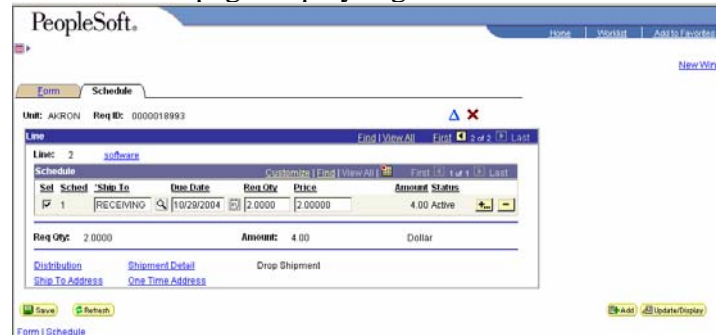
What you do	What happens
<p>6. At the end of the first line, click on the Add  button to add another distribution line. Only add one distribution line a time.</p> <p>7. Enter each SpeedChart and the Quantity (or Amount) you wish to charge to each SpeedChart.</p> <p>8. Enter the Quantity or Amount to Distribute.</p> <p>9. Click on the OK button when complete.</p>	<p>The Multiple SpeedCharts screen will display as below.</p> 

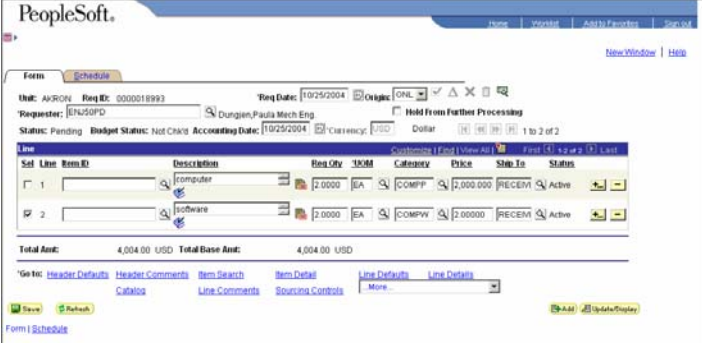
10. The Distribution page returns with the multiple SpeedCharts and the appropriate Quantities, Amounts, Percentages, and Chartfields.



11. Click on the **OK** button.

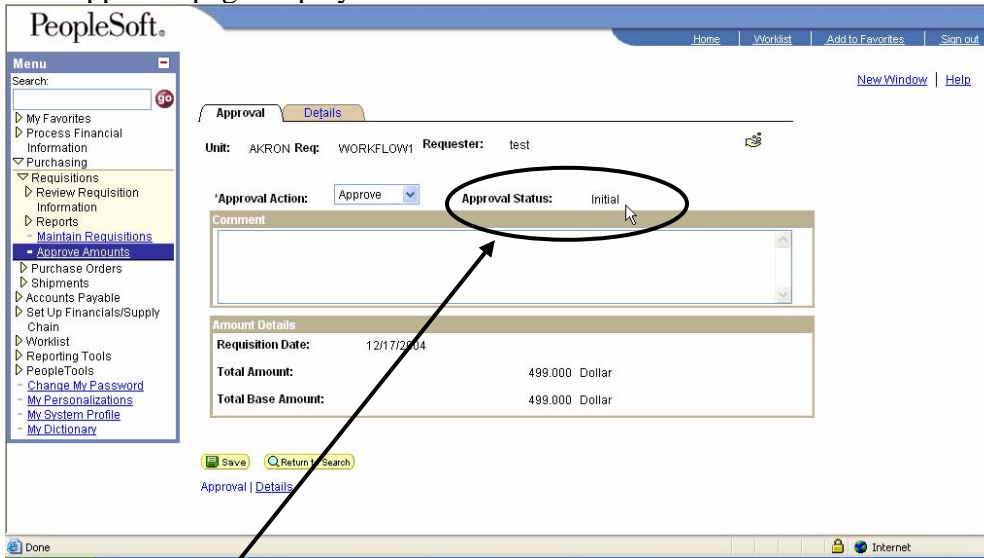
The Schedule page displays again.



What you do	What happens
<p>12. To return to the Form page, click on the Form tab or the Form link at the bottom of the page.</p>	<p>The Form page displays again.</p>  <p>The screenshot shows the PeopleSoft interface for a requisition form. At the top, it says 'PeopleSoft.' Below that, there are tabs for 'Form' and 'Schedule'. The 'Form' tab is active. The page displays various fields including 'Unit: AKRON', 'Req ID: 000018993', 'Req Date: 10/25/2004', and 'Requester: JEN25FD'. There is a table with columns: 'Sel', 'Line', 'Item ID', 'Description', 'Req Qty', 'Unit', 'Category', 'Price', 'Stat In', and 'Status'. Two lines are visible: Line 1 for 'Computer' and Line 2 for 'Software'. At the bottom, there are buttons for 'Save', 'Refresh', and 'Update/Display'.</p>
<p>13. Click on the Save button to save the newly added distributions.</p> <p>Note: To print the requisition from this page, see Chapter 4, Method 1 for details.</p>	
<p>--- Initiating the Workflow Process--- (must be done on every requisition)</p>	
<p>14. Using the main menu choose: Purchasing, Requisitions, Approve Amounts</p> <p>Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.</p>	

What you do	What happens
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15. The Approval page displays.



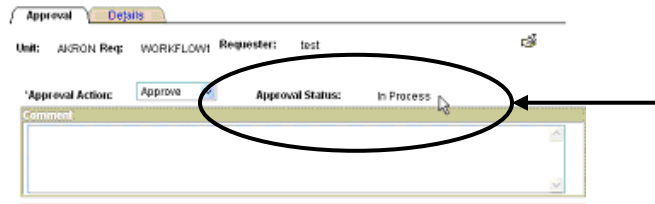
The **Approval Status** field will be Initial.

16. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process”** if you are not an approver.

The status will change to **“Complete”** if you are an approver or if your requisition is under \$500 and you have the limited authority classification.

The Approval Status field updates.



17. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).

Type 3: One Vendor, Multiple Lines, Override SpeedChart per Line

Use this procedure when you need to enter one PeopleSoft Requisition for multiple line items and then change an entire line to a new SpeedChart (override the default SpeedChart entered on the Header Defaults page).

What you do	What happens
1. Follow the steps for Type 1 requisitions.	A requisition is entered.

2. If necessary, click on the **Form** tab or on the **Form** link at the bottom of the page.

The Form page displays.

The screenshot shows the PeopleSoft Requisition Form page. The header includes fields for Unit (AKRON), Req ID (0000018995), Req Date (10/26/2004), and Origin (ONL). The 'Requester' is listed as ENJ50PD. Below the header is a table with two line items:

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1		COMPUTER, LAPTOP	1.0000	EA	COMPP	2,300.000	RECEM	Active
2		COMPUTER ASSEC.	2.0000	EA	COMPS	15.00000	RECEM	Active

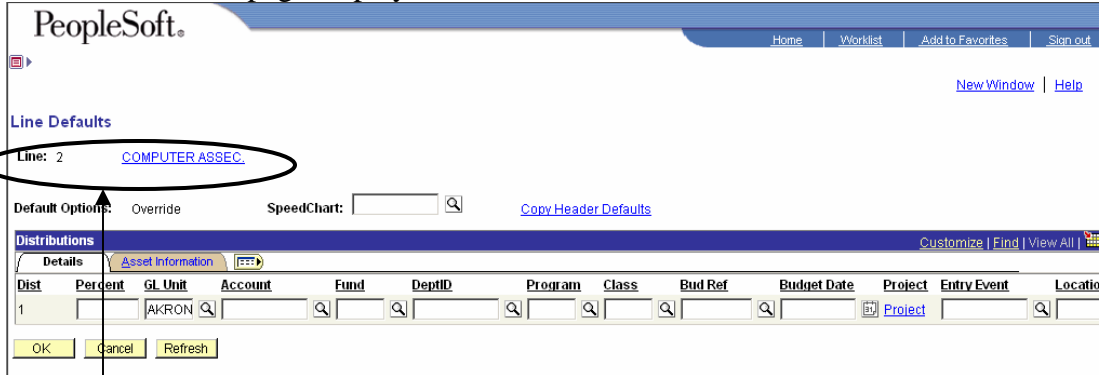
Below the table, the 'Total Amt' is 2,330.00 USD and the 'Total Base Amt' is 2,330.00 USD. At the bottom, there are navigation buttons like 'Save', 'Return to Search', and 'Add'.

<p>3. Select the line that you want to override the SpeedChart for by clicking in Sel column.</p> <p>Note: The last box checked is the line selected.</p>	
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What you do	What happens
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- Click on the **Line Defaults** link at the bottom of the page.

The Line Defaults page displays.

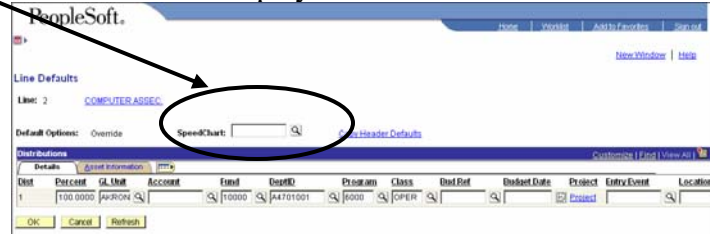


Note: Verify that the correct line item has been selected.

- In the **SpeedChart** field, enter the six-digit SpeedChart (Account Code) for this line item.

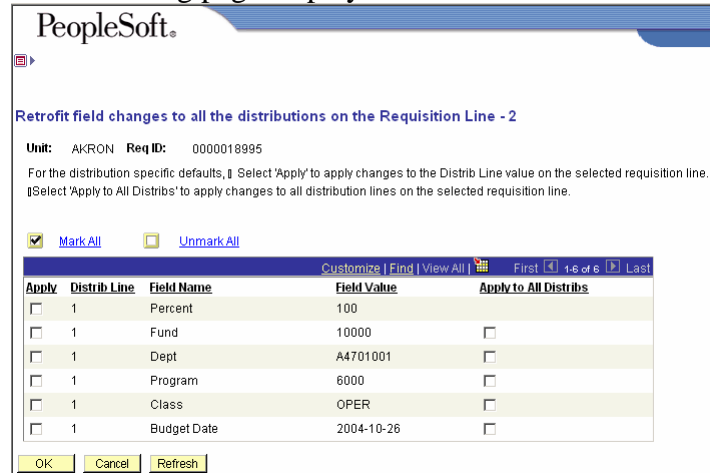
Click on the **Refresh** button to populate the Chartfields.

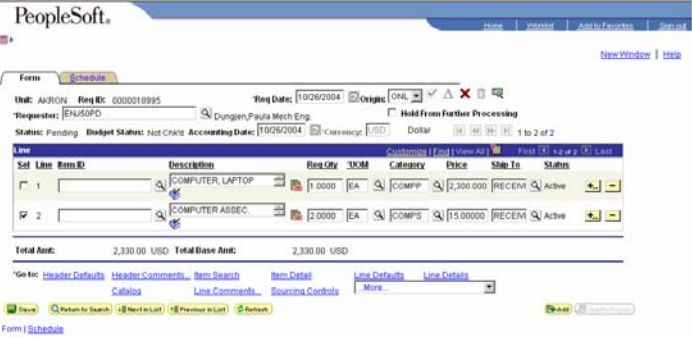
The Chartfields display.



- Click on the **OK** button.

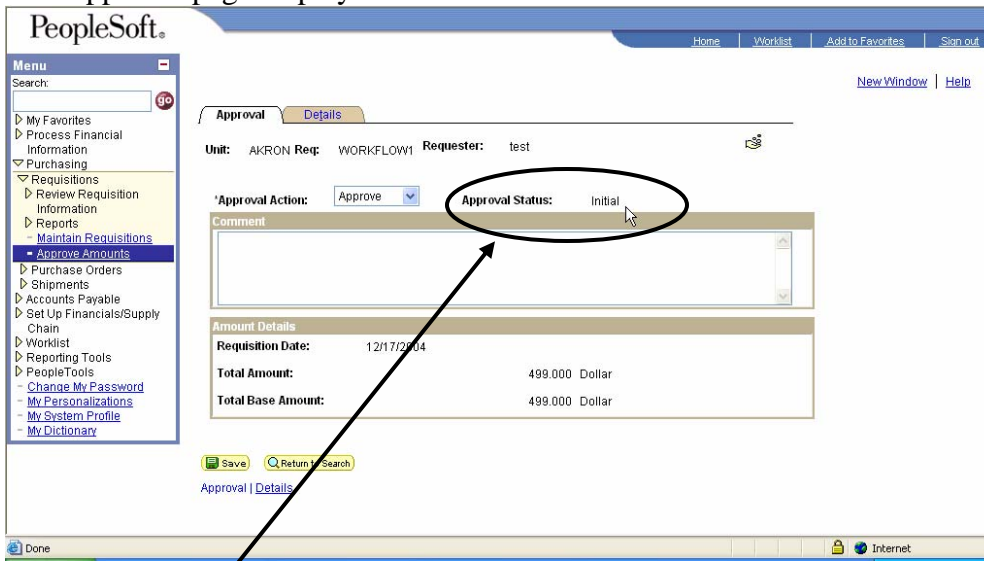
The following page displays.



What you do	What happens
<p>7. Click on the Mark All link.</p> <p>Note: The result of clicking on the Mark All link will be a checkmark in all checkboxes in the Apply column.</p> <p>8. Click on the OK button.</p>	<p>The Form page displays again.</p>  <p>The screenshot shows the PeopleSoft interface for a requisition form. At the top, it says 'PeopleSoft.' and has navigation links like 'Home', 'Logout', 'Add to Favorites', and 'Top of Page'. Below that, there's a 'Form' tab and a 'Schedule' link. The main area contains a header with fields for 'Unit: AKRON', 'Req ID: 000018995', 'Req Date: 10/29/2004', and 'Origin: CRK'. There are also buttons for 'Print', 'Hold From Further Processing', and 'Status: Pending'. Below the header is a table with columns: 'Sel', 'Line', 'Item ID', 'Description', 'Req Qty', 'Unit', 'Category', 'Price', 'Stat In', and 'Status'. The table has two rows: Line 1 for 'COMPUTER LAPTOP' and Line 2 for 'COMPUTER ASSEC'. At the bottom, there are 'Total Amt: 2,330.00 USD' and 'Total Base Amt: 2,330.00 USD'. There are also navigation buttons like 'Save', 'Return to Search', 'Next in List', 'Previous in List', and 'Refresh'.</p>
<p>9. Click on the Save button.</p> <p>Note: To print the requisition from this page, see Chapter 4, Method 1 for details.</p>	
--- Initiating the Workflow Process--- (must be done on every requisition)	
<p>10. Using the main menu choose: Purchasing, Requisitions, Approve Amounts</p> <p>Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.</p>	

What you do	What happens
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11. The Approval page displays.



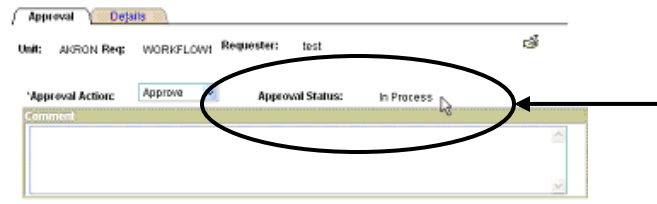
The **Approval Status** field will be Initial.

12. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process”** if you are not an approver.

The status will change to **“Complete”** if you are an approver or if your requisition is under \$500 and you have the limited authority classification.

The Approval Status field updates.



13. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).

Ending Notes for Adding Requisitions

After you save the requisition, an email message will go to your Approver stating that a requisition is waiting approval in their Worklist. This is a new feature in version 8.

Also, after you save a requisition, one of the following will occur:

1. If it is approved, you will receive an e-mail indicating that it was approved and forwarded to Purchasing for processing. The e-mail will contain any comments offered by the Approver.
2. If it was denied, you will receive an e-mail indicating that it was denied with any comments provided by the Approver.
3. If it was recycled, you will receive an e-mail indicating it was recycled with any comments provided by the Approver concerning changes that need to be done before it will be approved. A recycled requisition will be routed to your Worklist. See Chapter 5, Part E for additional information about how to work with recycled requisitions.
4. If no action was taken on the requisition in three business days, your requisition will be recycled and returned to you for action. You will also receive an e-mail indicating that no action was taken on your requisition. You may wish to contact the Approver concerning the requisition or in some cases you may need to contact The Department of Purchasing to cancel the requisition. Timed Out requisitions can be found in your Worklist.

Note: If you are both the Requester and the Approver you will not need to follow the Approval Process Instructions. The requisition that you save will bypass the Worklist and move on to Budget Checking (Commitment Control.)

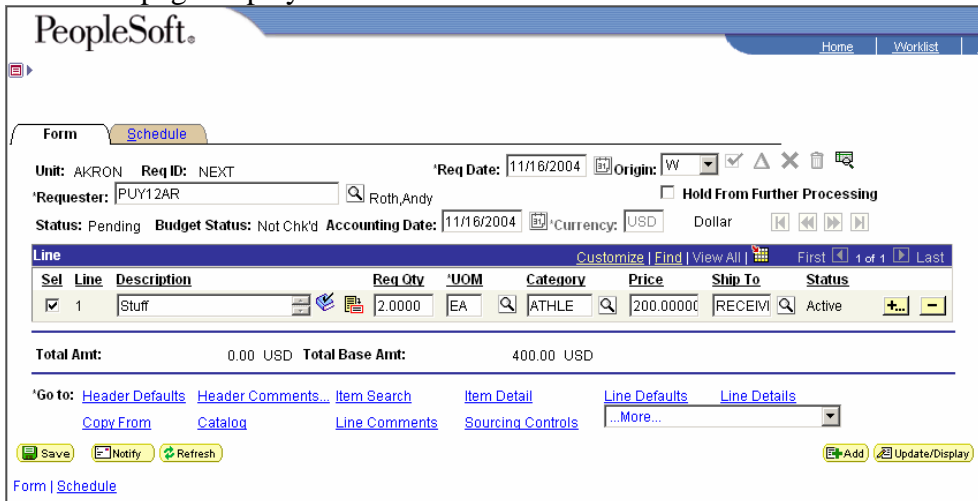
Chapter 4 : Printing a Requisition

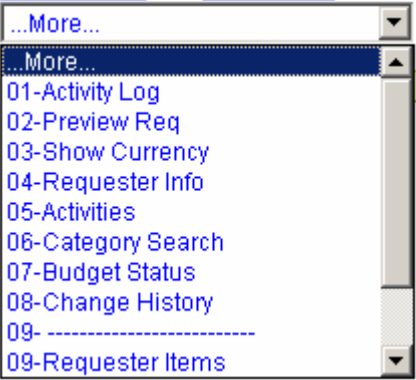
Method 1: Printing a Requisition from the Form Page

You can print a requisition right after you save it by using the More drop down box in the bottom right corner of the Form page. You can print the requisition from this page anytime before the requisition has a status of “Complete.” A Completed requisition is a requisition that has completed the Requisition Life Cycle. After a requisition has been completed, you will not be able to access this page and therefore you will need to follow Method 2 to print the requisition.

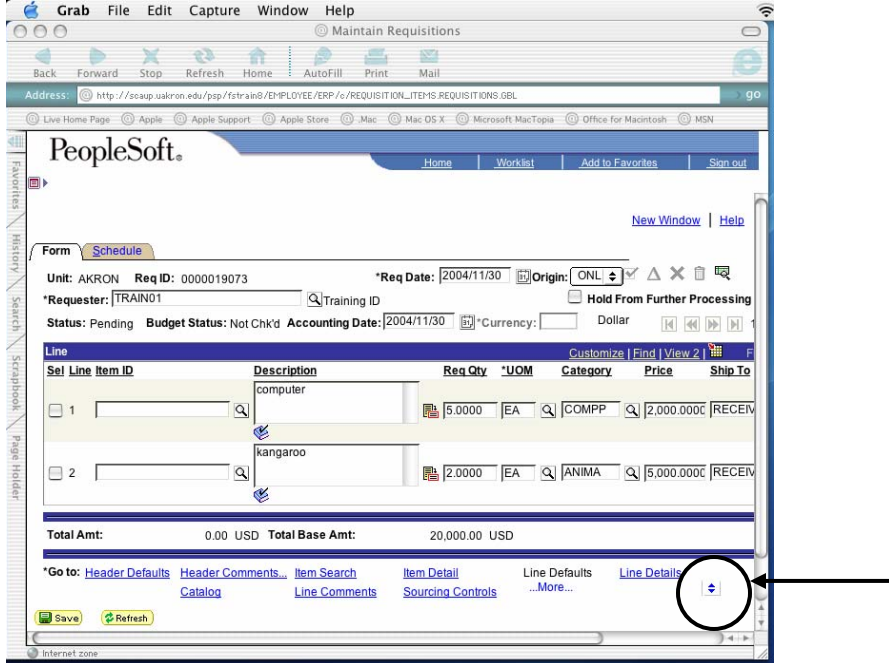
What you do	What happens
<p>1. If you just completed the requisition, verify that you are on the Form page.</p> <p>OR</p> <p>From the menu, chose: Purchasing, Requisitions, Maintain Requisitions</p> <p>Use the Find an Existing Value page to locate the requisition.</p>	

2. The Form page displays.



What you do	What happens
<p>3. Click in the More drop down box for a list of selections. This box is in the lower right corner of the page.</p>	<p>The More drop down box:</p> 

4. **Note:** If you are a MAC user, the Form page will display as follows:



You will need to click on the arrows button (circled above) to open the **More** drop down box.

What you do	What happens
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- Select from the list, **02-Preview Req.**

The Administration page displays.

The screenshot shows the Administration page with the following elements:

- Navigation tabs: List, Explorer, Administration, Archives
- View Reports For section: User ID: AC6248F, Type: [dropdown], Last: 1 Days, Refresh button
- Report List table with columns: Select, Report ID, Prcs Instance, Description, Request Date/Time, Format, Status, Details
- Table rows include: Dept Budget Summary-One Line, Dept Budget Detail, Dept Budget Summary, and Requisition Print SQR.
- Buttons: Select All, Deselect All, Delete
- Save button
- Navigation links: List | Explorer | Administration | Archives

- Locate the requisition by looking for, **Requisition Print SQR** in the Report Description column.

- Click on the **Refresh** button until the **Status** is Posted. After the report is Posted, the **report description** will become a hyperlink.

The Report Name will become a hyperlink once the status is Posted. Use this hyperlink to view the report.

The Report Description hyperlink appears.

This screenshot is identical to the previous one, but a circle highlights the 'Requisition Print SQR' entries in the 'Description' column, indicating that the text has become a clickable hyperlink.

What you do	What happens
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8. Click on the report description hyperlink for the report.

The report is opened in a new Internet Explorer/Adobe Viewer window.

Departmental Purchase Requisition

Ship To: Central Stores
185 East Mill Street
Akron OH 44325-0703
USA

Business Unit: AKRON	
Req ID: 0000019191	Date: 11/30/2004
Requester: <u>Both, Andy</u>	Page: 1
Requester Signature:	Currency: USD

Line-Schd	St	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1	A		ABC		1.0000	EA	100.00	100.00	
			Vendor: 0000001342 Department of Purchasing						
			Distribution: 10000/A4756002 (200704) Software Training Svcs				100.00		
							<u>Line Total:</u>	<u>100.00</u>	
2-1	A		XYZ		1.0000	EA	100.00	100.00	
			Vendor: 0000001342 Department of Purchasing						
			Distribution: 10000/A4756002 (200704) Software Training Svcs				100.00		
							<u>Line Total:</u>	<u>100.00</u>	
							<u>Total Requisition Amount:</u>	<u>200.00</u>	

9. Select from the browser's menu **File, Print.**

OR

Click on the Printer tool in the browser's toolbar or in Adobe Acrobat's toolbar.

In the Window's Print dialog box, make your printing choices.

10. You may opt to save the document instead of printing if you wish to conserve paper or forward the requisition to someone else on campus electronically.

Method 2: Printing a Requisition using the Req Print Page

Part A: Creating a Run Control

What is a Run Control ID?

A Run Control ID is an identification code that represents:

- your PeopleSoft ID
- the process you are running, such as printing a departmental budget report or printing a requisition

Each process that you run needs its own unique Run Control ID. If you print budget reports and print requisitions, you will create one Run Control ID for printing budget reports and one Run Control ID for printing requisitions.

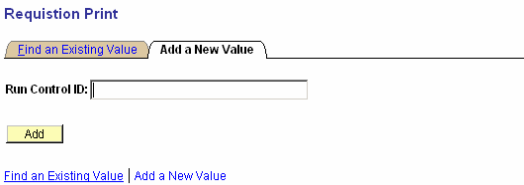
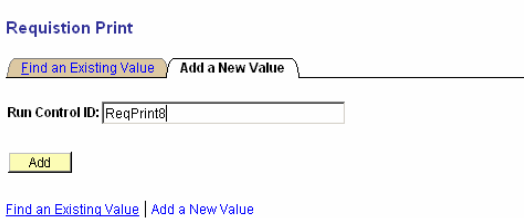
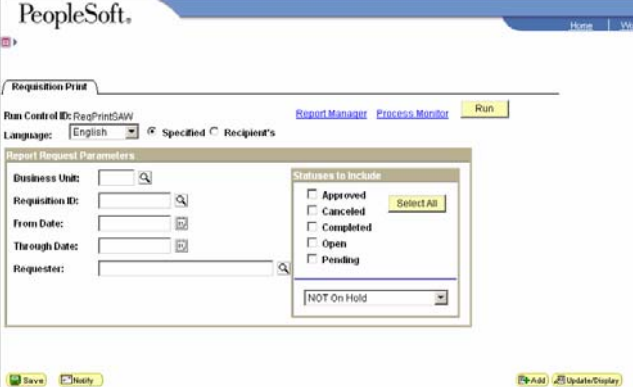
When do you create a Run Control ID?

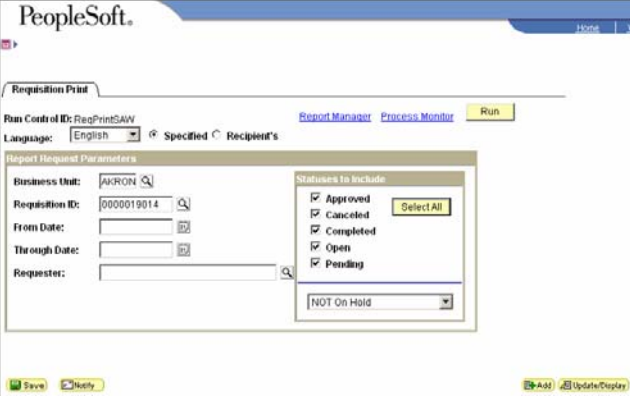
The first time that you run a process, you need to create a Run Control ID. Some examples of processes are gathering the data to print a Departmental Budget Report or gathering the data to print a requisition.

When you run the process in the future, you use the same Run Control ID as the first time that you ran the process.

What are the characteristics of a Run Control ID?

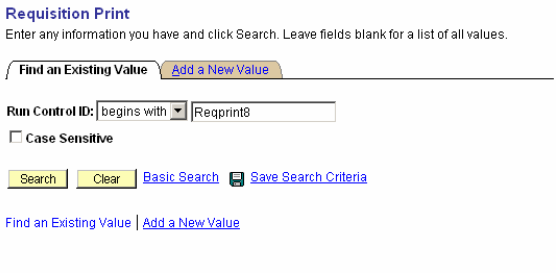
A Run Control ID can be up to 16 characters in length. It cannot contain spaces. Some examples of Run Control IDs are **BudgetPrint8** or **ReqPrint8**. You may use your old Run Control from Version 7.5 to print requisitions in Version 8.

What you do	What happens
<p>1. From the main menu, choose: Process Financial Information, UA Department Inquiries, Report, Requisition Print</p> <p>2. Click on the Add a New Value link or on the Add a New Value folder tab</p>	<p>The Add a New Value page is displayed.</p>  <p>Requisition Print</p> <p>Find an Existing Value Add a New Value</p> <p>Run Control ID: <input type="text"/></p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>
<p>3. Type a RunControl ID with a maximum number of 16 characters and no spaces.</p> <p>For example, enter ReqPrint8.</p>	 <p>Requisition Print</p> <p>Find an Existing Value Add a New Value</p> <p>Run Control ID: <input type="text" value="ReqPrint8"/></p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>
<p>4. Click on the Add button <input type="button" value="Add"/></p>	<p>The Requisition Print page is displayed.</p>  <p>PeopleSoft</p> <p>Requisition Print</p> <p>Run Control ID: ReqPrintSAW Report Manager Process Monitor <input type="button" value="Run"/></p> <p>Language: <input type="text" value="English"/> <input checked="" type="radio"/> Specified <input type="radio"/> Recipient's</p> <p>Report Request Parameters</p> <p>Business Unit: <input type="text"/> <input type="button" value="Find"/></p> <p>Requisition ID: <input type="text"/> <input type="button" value="Find"/></p> <p>From Date: <input type="text"/> <input type="button" value="Find"/></p> <p>Through Date: <input type="text"/> <input type="button" value="Find"/></p> <p>Requester: <input type="text"/> <input type="button" value="Find"/></p> <p>Statuses to Include</p> <p><input type="checkbox"/> Approved <input type="checkbox"/> Canceled <input type="checkbox"/> Completed <input type="checkbox"/> Open <input type="checkbox"/> Pending</p> <p><input type="button" value="Select All"/></p> <p><input type="text" value="NOT On Hold"/></p> <p><input type="button" value="Save"/> <input type="button" value="Apply"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/></p>

What you do	What happens
<p>5. Enter or verify information as follows: Recipient's radio button is active Business Unit: Akron Requisition ID: Enter ID with lead zeros. Statuses to Include Frame: Select All</p> <p>Click on the Save button.</p>	
<p>6. Go to Step 5 in the next section (printing a requisition) to continue with the Requisition Print Process.</p>	

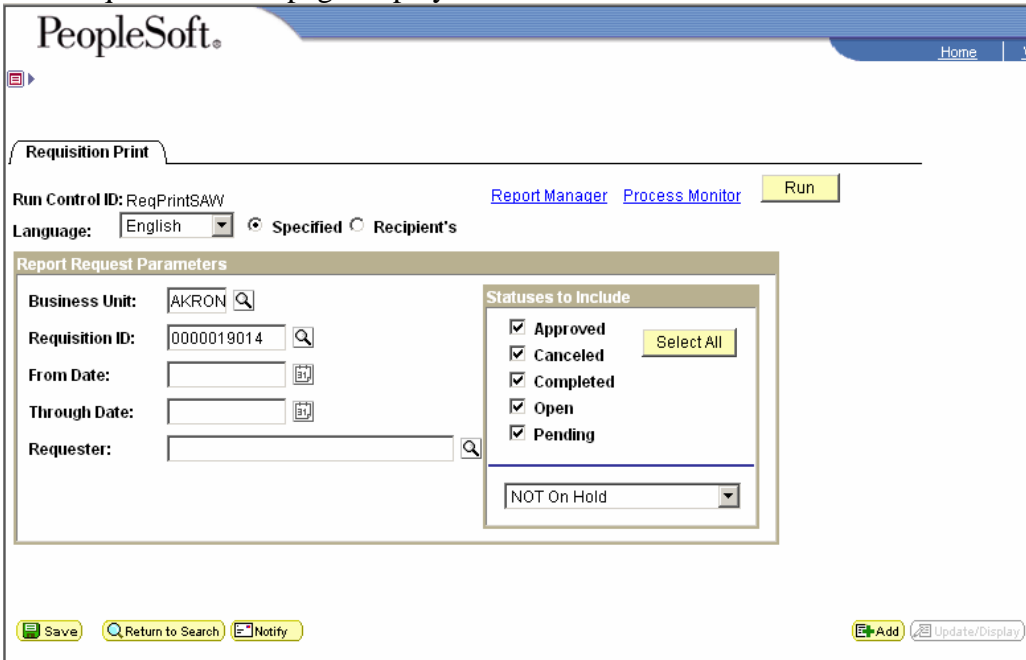
Part B: Printing a Requisition

You should have already created a Run Control ID for printing a requisition. If you have not created a Run Control ID, please refer to the previous section in this chapter, Creating a Run Control.

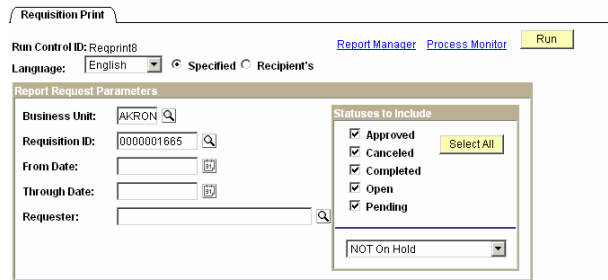
What you do	What happens
<p>1. From the main menu, choose: Process Financial Information, UA Department Inquiries, Report, Requisition Print</p> <p>If necessary, click on the Find an Existing Value tab or link at the bottom of the page.</p>	<p>The Find an Existing Value page displays.</p>
<p>2. In the Run Control ID field, enter the ID that you created, i.e., ReqPrint8.</p> <p>OR Click on the Search button.</p> <p>If you did not enter the complete Run Control ID or if you clicked on the Search button, you will be returned Search Results at the bottom of the page. Click on the correct Run Control ID to advance to the next step.</p>	

What you do	What happens
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3. The Requisition Print page displays.



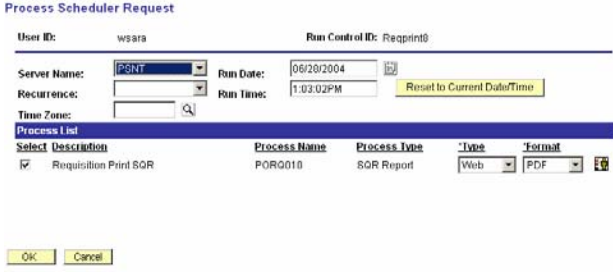
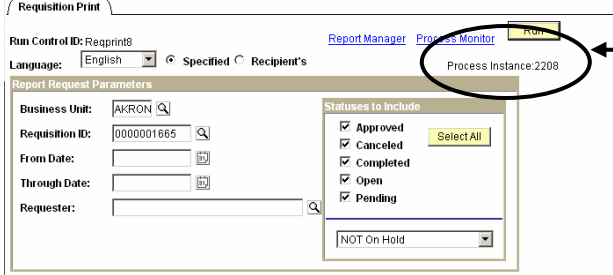
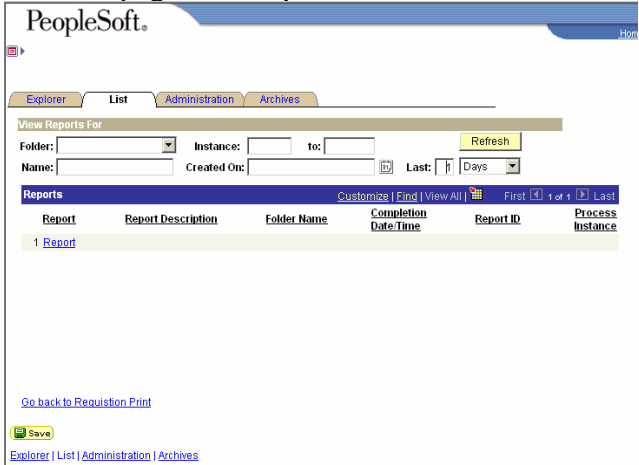
4. Enter or verify information as follows:
Business Unit: Akron
Requisition ID: Enter ID with lead zero's
Statuses to Include Frame: Select All

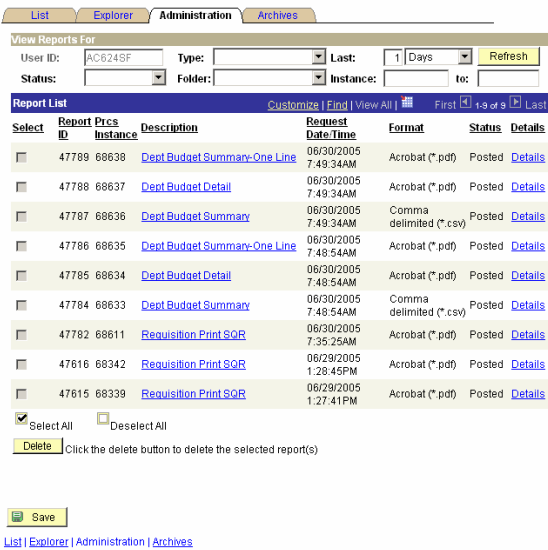
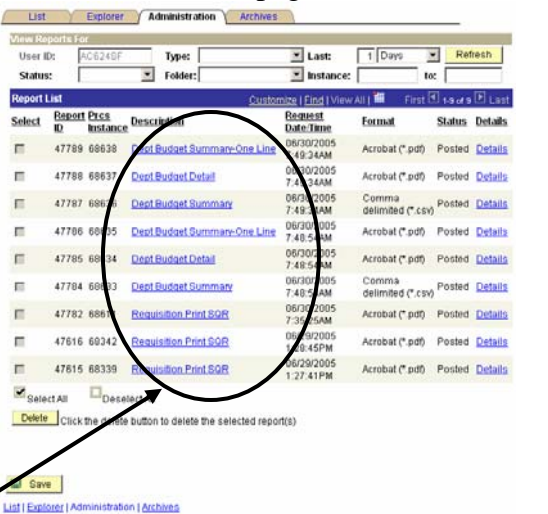


5. Click on the **Run** button.

The Process Scheduler Request page displays.



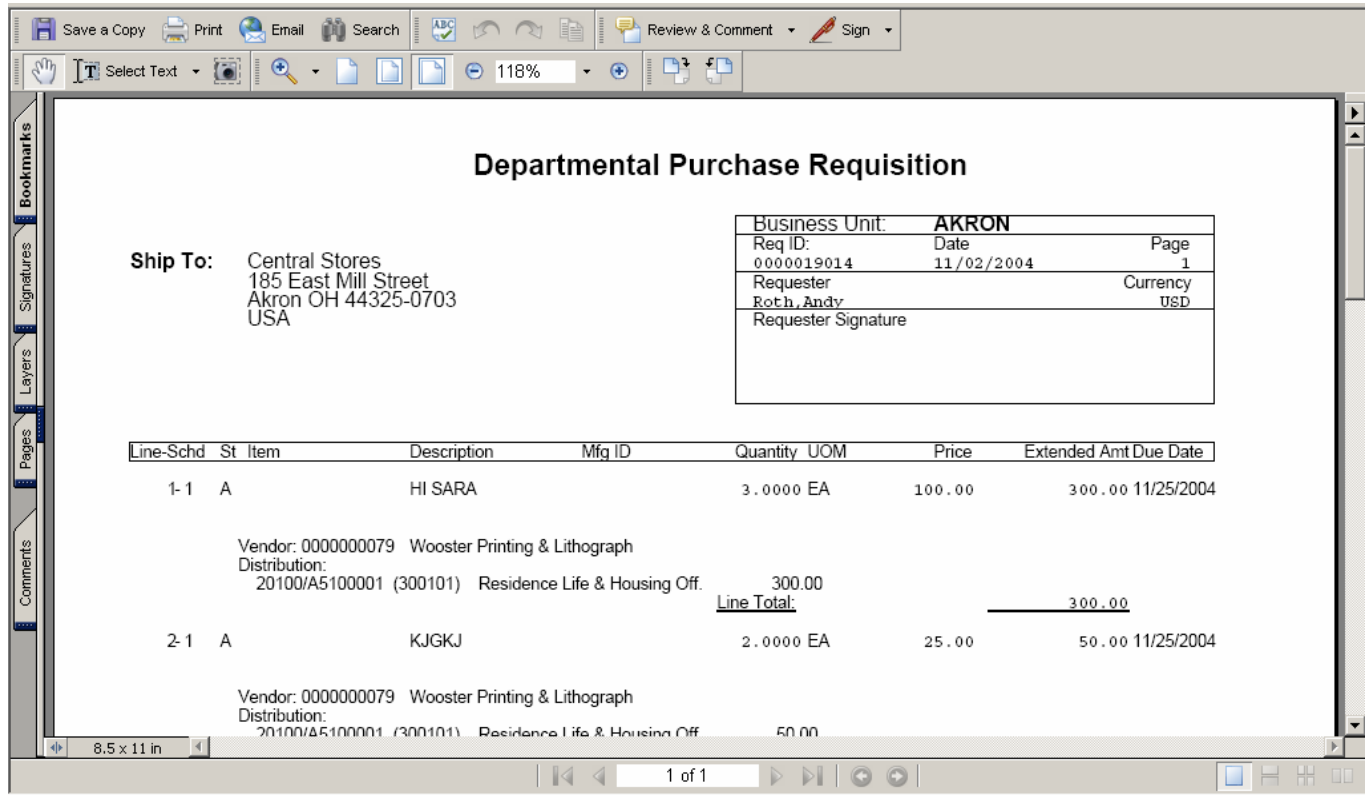
What you do	What happens
<p>6. Note/Select the following:</p> <p>Server Name: PSNT Run Date: (Do not change the system date that defaults.) Run Time: (Do not change the system time that defaults.)</p> <p>In the Process List grid at the bottom of the page: A checkmark needs to appear in the Select checkbox. Type: Web Format: PDF</p>	<p>The Process Scheduler page is displayed with your choices.</p> 
<p>7. Click on the OK button.</p> <p>Note the Process Instance number.</p>	<p>The Requisition Print page returns with the Process instance.</p> 
<p>8. Click on the Report Manager link.</p>	<p>The Report Manager component is displayed. The List page is on top.</p> 

What you do	What happens
<p>9. Click on the Administration folder tab.</p>	<p>The Administration page is displayed.</p> 
<p>10. In the Report List grid, look in the Prcs Instance field to locate the Process Instance number for your report.</p> <p>You noted that number on the Requisition Print page.</p> <p>11. Click on the Refresh button until the Status is Posted. After the report is Posted, the report description will become a hyperlink.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>The Report Name will become a hyperlink once the status is Posted. Use this hyperlink to view the report</p> </div>	<p>The Administration page:</p> 

What you do	What happens
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12. Click on the report description hyperlink for the report.

The report is opened in a new Internet Explorer/Adobe Viewer window.



13. Select from the browser's menu **File, Print.**

OR

Click on the Printer tool in the browser's toolbar or in Adobe Acrobat's toolbar.

In the Window's Print dialog box, make your printing choices.

You may opt to save the document instead of printing if you wish to conserve paper or forward the requisition to someone else on campus electronically.


Chapter 5 : Recall a Requisition

This chapter will outline the process for opening the pages that you used to enter a requisition. You would use this process for the following reasons:

- To open a “held” requisition (the Hold from Processing option was used)
- To review or inquire on a previously saved requisition (approved or pending)
- To return to a non-approved requisition to make changes

This chapter will also outline the steps for making changes to a requisition before and after approval, deleting or canceling a requisition, and working with a recycled requisition.

Part A: Recalling a Requisition

What you do	What happens
<p>1. From the main menu, choose: Purchasing, Requisitions, Maintain Requisitions</p> <p>Click on the Find an Existing Value link or the Find an Existing Value folder tab.</p>	<p>The Find an Existing Value page displays.</p> 
<p>2. Search for the requisition using one or both of the search fields below:</p> <p>Requisition ID: Use the operator of “=” or “begins with” if you are entering the full requisition ID. Use the operator of “contains” to enter just the last digits (minus the zeros).</p> <p>Requester: The UserID of the requester must be used instead of the requester’s last name. This is the ID that you use to log into PeopleSoft. This is not case sensitive.</p> <p>After you filled in the search criteria, click on the Search button.</p>	

What you do	What happens
<p>3. Depending on the search criteria you entered, you may need to locate the requisition and click on any of the links for the requisition that you want to open.</p> <p>Search results will display if you searched by Requester and there are multiple requisitions saved for that requester.</p>	

4. Review or inquire by locating the desired data using the Form and Schedule pages (tabs) or by using the hyperlinks at the bottom of the pages.

See the next two sections for additional information about making changes to the recalled requisition.

The Form page displays.

The screenshot displays the PeopleSoft Requisition Form page. At the top, the PeopleSoft logo is visible along with navigation links for Home, Worklist, and Add to Favorites. The page is divided into two tabs: 'Form' (selected) and 'Schedule'. The main content area shows requisition details: Unit: AKRON, Req ID: 0000018993, Req Date: 10/25/2004, Origin: ONL, Requester: ENJ50PD, and Requester Name: Dungjen, Paula Mech Eng. The status is 'Pending' and the budget status is 'Not Chkd'. A table below lists two line items: Line 1 for 'computer' and Line 2 for 'software', both with a quantity of 2.0000 and a price of 2,000.00. The total amount is 4,004.00 USD. At the bottom, there are navigation links and buttons for Save, Return to Search, Next in List, Previous in List, Refresh, Add, and Update/Display.

Part B: Modifying a Requisition Prior to Approval

If you are a Requester/Approver (dual role) you cannot change a requisition after you save it and Approve the Amounts. Please contact the Department of Purchasing if you need changes made to the requisition.

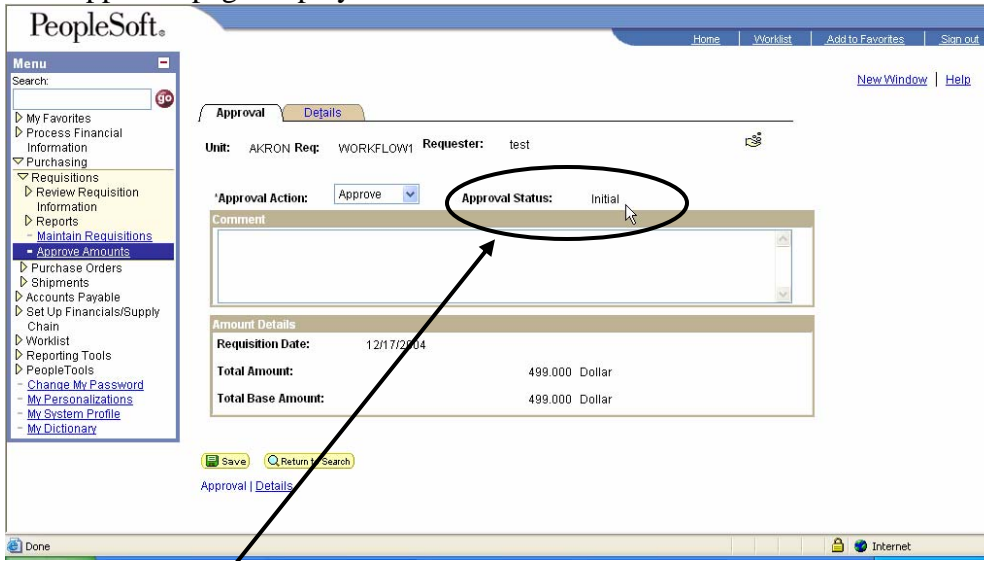
If you are a Requester with the Limited Authority Class (automatic approval on requisitions under \$500) and you enter a requisition under \$500, you cannot make changes to a requisition after you save it and Approve the Amounts. Please contact the Department of Purchasing if you need changes.

If you are just a PeopleSoft Requester (enter requisitions, but do not approve), follow the steps outlined below.

What you do	What happens
<p>1. Make modifications to any field that you normally have access to, add new lines, or delete lines and then click on the Save button when you are done.</p> <p>To:</p> <p>Add/Delete lines: Form page (tab) Change Vendor per line: Select line (Sel field), Line Details link. Change SpeedChart: Schedule page (tab) Comments (per line): Select line (Sel field), Line Comments link Comments (per requisition): Header Comments link.</p>	<p>Note: All Header Default information (Vendor, Due Date, and SpeedChart) will be copied into added lines.</p>
<p>2. Using the main menu choose: Purchasing, Requisitions, Approve Amounts</p> <p>Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.</p>	

What you do	What happens
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3. The Approval page displays.

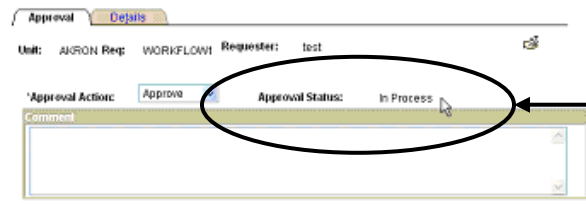


The **Approval Status** field will be Initial. If the Status is *In Process* that means that you did not make any changes that would affect the overall dollar amount of the requisition.

4. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process.”**

The Approval Status field updates.



5. The Requisition is now ready for Approval.

Part C: Modifying a Requisition after Approval

Requisitions may not be changed by the Requester after approval. Contact the Department of Purchasing (specifically the appropriate Buyer) if you need to make changes to the requisition.

Part D: Cancel a Requisition

Requisitions cannot be canceled by the Requester before or after approval. Contact the Department of Purchasing if you need to cancel the requisition.

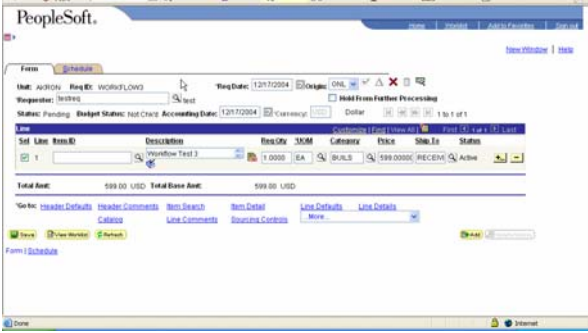
Part E: Processing a Recycled Requisition (as the Requester)

Once you process and save a requisition it will go to your Approver to *Approve, Deny* or *Recycle*. The status of *Recycle* should be used if the Approver wants the Requester to make adjustments (of any kind) to the requisition prior to Approval, Budget Checking (Commitment Control) and then processing by the Department of Purchasing. If the requisition is *Recycled*, you will need to open your Worklist and make the necessary changes, save the updated requisition, and then initiate the Workflow Process.

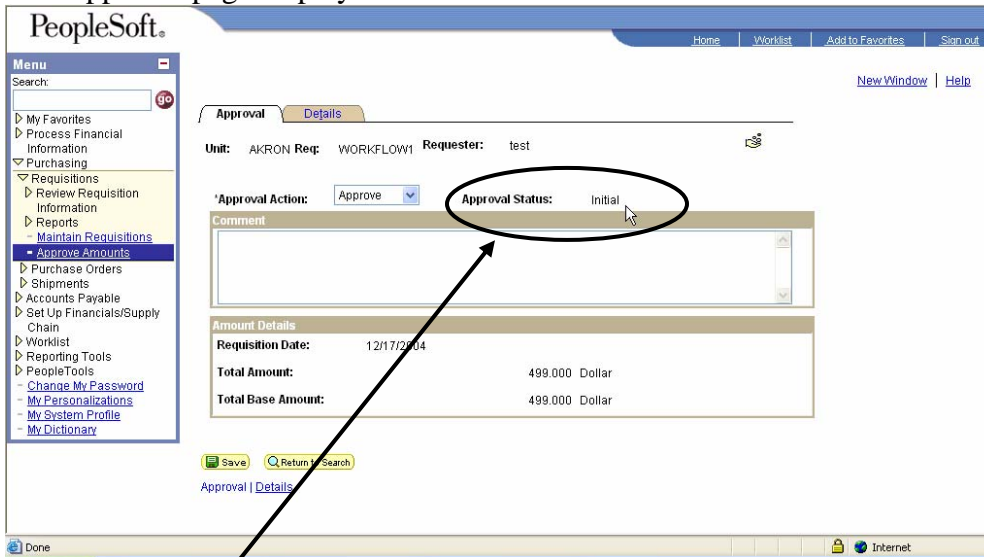
What you do	What happens
1. You will receive an email message indicating that you have a recycled requisition waiting in your Worklist.	
2. To open your Worklist, use the main menu and choose: Worklist, Worklist OR Click on the Worklist link in the Navigation bar (top right corner of the page).	

3. The Worklist page displays.

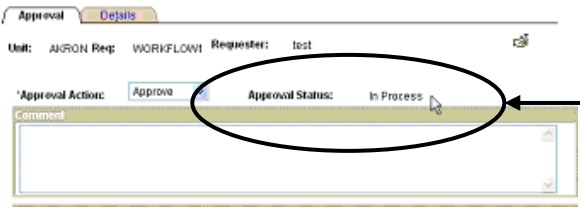
The screenshot shows the PeopleSoft Worklist interface. On the left is a navigation menu with 'Worklist' selected. The main area displays a table titled 'Worklist for testreq: test'. The table has the following columns: From, Date From, Work Item, Worked By Activity, Priority, and Link. A row is highlighted with a yellow background, showing 'Roth,Andy' as the requester, '12/17/2004' as the date, 'Recycle Req Worklist' as the work item, and 'Update Requisition' as the activity. The 'Link' column for this row contains a dropdown menu with the option '34116.AKRON.WORKFLOW3' selected and circled in black. An arrow points from a text box on the right to this link. The text box contains the text: 'Link Column to open a requisition for approval.'

What you do	What happens
<p>4. Click on the link for the requisition that is found in the Link column.</p>	<p>The (Maintain Requisitions) Form page displays.</p> 
<p>5. Make modifications as directed from the comments supplied by the Approver.</p>	
<p>6. Click on the Save button.</p>	
<p>7. Using the main menu choose: Purchasing, Requisitions, Approve Amounts</p> <p>Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.</p>	

8. The Approval page displays.



The **Approval Status** field will be Initial.

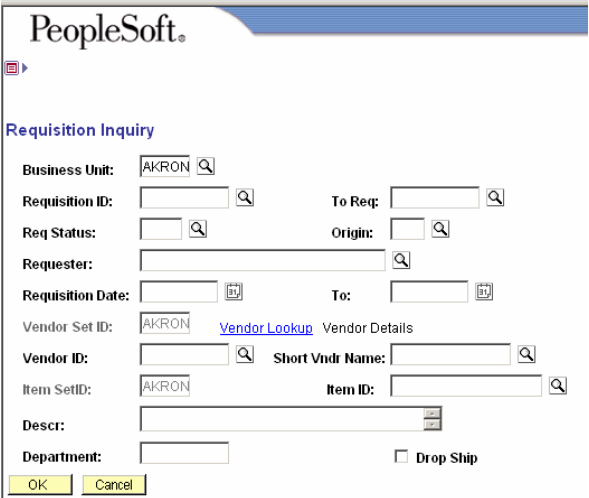
What you do	What happens
<p>9. Click on the Save Button.</p> <p>The Approval Status of your requisition will change to “In Process.”</p>	<p>The Approval Status field updates.</p> 
<p>10. The Requisition is now ready for Approval again.</p>	


Chapter 6 : Requisition Inquiry

Requisition Inquiry Page

You can use this page to locate the following information:

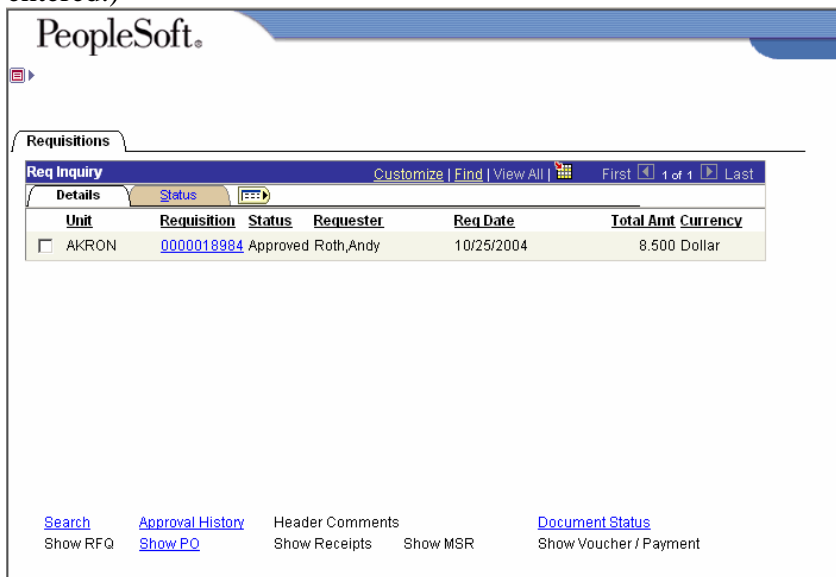
- Status of the requisition
- The Date the requisition was created
- Total Amount of requisition
- Items on a requisition
- Approval History
- If a Purchase Order has been created
- If the items from the requisition have been received
- If a Voucher has been created
- If payment has been made and the check number

What you do	What happens
<p>1. From the main menu, choose: Purchasing, Requisitions, Review Requisition Information, Requisitions</p>	<p>The Requisition Inquiry search page displays:</p> 

What you do	What happens
<p>2. Fill in search criteria. Using more criteria will return a smaller group of requisitions.</p> <p>However, this panel may be used to review all (limit of 20 at a time) of the Requester's requisitions for a given time period.</p> <p>Business Unit: AKRON. Requisition ID: Enter Requisition ID, including any lead zeros. Requester: User ID. You can use the Look up  button to return search results. This is the ID that you use to log on to PeopleSoft. Requisition Date: Date requisition was entered. You can use the Choose a Date button to display a calendar. Vendor: Vendor ID, will list all requisitions for this Vendor.</p> <p>Click on the OK button.</p>	

3. The Req Inquiry Details page displays.

This page displays all requisitions that met the search criteria. This is an example of when the search criteria returned one requisition. (This is an example of when the Req ID was entered.)



What you do	What happens
-------------	--------------

4. The Req Inquiry Details page displays.

This is an example of when the search criteria returned several requisitions. (This is an example of when the Requesters ID was entered.)

PeopleSoft.

Requisitions

Req Inquiry

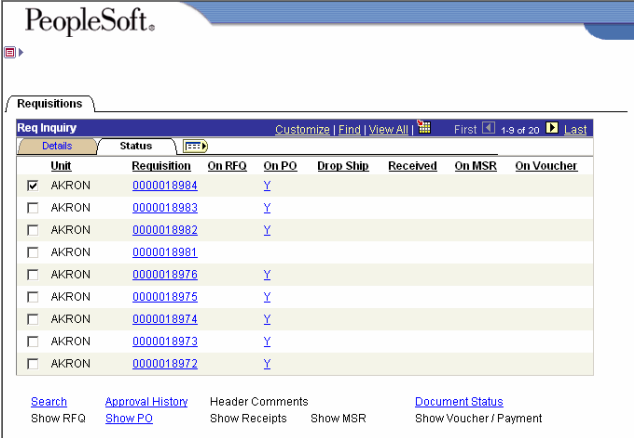

Customize | Find | View All | First 1-9 of 20 Last

Unit	Requisition	Status	Requester	Req Date	Total Amt	Currency
<input checked="" type="checkbox"/>	AKRON 0000018984	Approved	Roth,Andy	10/25/2004	8.500	Dollar
<input type="checkbox"/>	AKRON 0000018983	Approved	Roth,Andy	10/25/2004	8.500	Dollar
<input type="checkbox"/>	AKRON 0000018982	Approved	Roth,Andy	10/25/2004	8.500	Dollar
<input type="checkbox"/>	AKRON 0000018981	Approved	Roth,Andy	10/22/2004	60.000	Dollar
<input type="checkbox"/>	AKRON 0000018976	Approved	Roth,Andy	10/22/2004	120.000	Dollar
<input type="checkbox"/>	AKRON 0000018975	Approved	Roth,Andy	10/22/2004	30.000	Dollar
<input type="checkbox"/>	AKRON 0000018974	Approved	Roth,Andy	10/22/2004	30.000	Dollar
<input type="checkbox"/>	AKRON 0000018973	Approved	Roth,Andy	10/22/2004	10.000	Dollar
<input type="checkbox"/>	AKRON 0000018972	Approved	Roth,Andy	10/22/2004	30.000	Dollar

[Search](#) [Approval History](#) Header Comments [Document Status](#)
 Show RFQ [Show PO](#) Show Receipts Show MSR Show Voucher / Payment

Note: You can print this page using the Internet Explorer. Use the Menu option of **File, Print.**

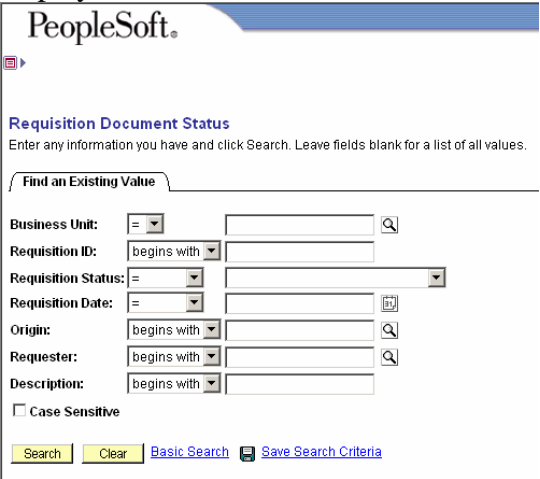

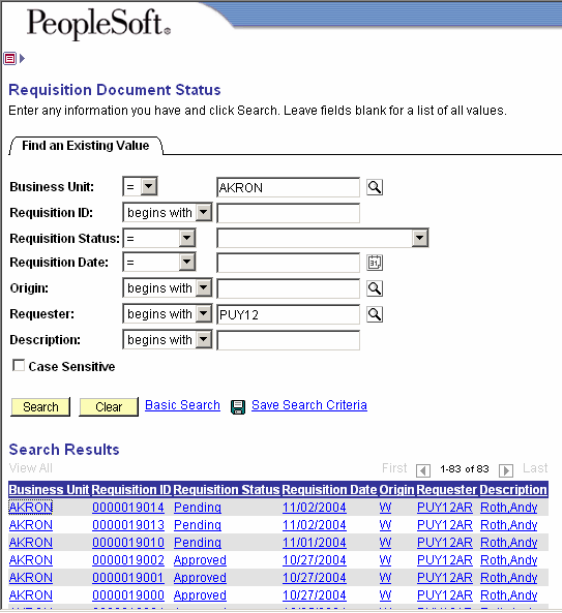
<p>5. You can find the following information on this page.</p> <ul style="list-style-type: none"> ■ Status (Approved, Denied, Recycled, Pending Approval, Canceled, or Complete) ■ Requester ■ Requisition Date ■ Total Amount 	
--	--

What you do	What happens
<p>6. Click on the Status tab (link) to obtain additional information.</p> <p>On the Status page you can find the following information:</p> <ul style="list-style-type: none"> ■ If a PO has been created (click on the “Y” link in the On PO column to obtain the PO ID number). ■ If a Receiver has been created (click on the “Y” link in the Received column to obtain the Receipt ID number). ■ If a Voucher has been created (click on the “Y” link in the On Voucher column to obtain the Voucher ID number). <p>You may also click on any of the active links at the bottom of the screen to view Approval History, Header Comments, etc. (The link will become active when a document exists.)</p>	<p>The Status page displays.</p> 
<p>7. To view the requisition items details, click on the Requisition ID link (Requisition Column) from either the Details or Status page.</p> <p>Click on the Return button to go back.</p>	<p>The Requisition Details page displays.</p> 

Req Doc Status Inquiry Page

You can use this page to locate the following information:

- Requisition Status
- Budget Status
- Requester Name
- Document ID's for Purchase Order, Voucher, and Payment

What you do	What happens																																																	
<p>1. From the main menu, choose: Purchasing, Requisitions, Review Requisition Information, Document Status</p>	<p>The Requisition Document Status Search page displays.</p> 																																																	
<p>2. Fill in search criteria.</p> <p>Business Unit: AKRON. Requisition ID: Use the operator of “=” or “begins with” if you are entering the full requisition ID. Use the operator of “contains” to enter just the last digits (minus the zeros). Requisition Date: Date requisition was entered. You can use the Choose a Date button to display a calendar. Requester: User ID. You can use the Look up  button to return search results. This is the ID that you use to log on to PeopleSoft.</p> <p>3. Click on the Search button.</p>	<p>The search results will display.</p>  <table border="1" data-bbox="802 1633 1360 1766"> <thead> <tr> <th>Business Unit</th> <th>Requisition ID</th> <th>Requisition Status</th> <th>Requisition Date</th> <th>Origin</th> <th>Requester</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>AKRON</td> <td>0000019014</td> <td>Pending</td> <td>11/02/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> <tr> <td>AKRON</td> <td>0000019013</td> <td>Pending</td> <td>11/02/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> <tr> <td>AKRON</td> <td>0000019010</td> <td>Pending</td> <td>11/01/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> <tr> <td>AKRON</td> <td>0000019002</td> <td>Approved</td> <td>10/27/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> <tr> <td>AKRON</td> <td>0000019001</td> <td>Approved</td> <td>10/27/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> <tr> <td>AKRON</td> <td>0000019000</td> <td>Approved</td> <td>10/27/2004</td> <td>W</td> <td>PUY12AR</td> <td>Roth,Andy</td> </tr> </tbody> </table>	Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description	AKRON	0000019014	Pending	11/02/2004	W	PUY12AR	Roth,Andy	AKRON	0000019013	Pending	11/02/2004	W	PUY12AR	Roth,Andy	AKRON	0000019010	Pending	11/01/2004	W	PUY12AR	Roth,Andy	AKRON	0000019002	Approved	10/27/2004	W	PUY12AR	Roth,Andy	AKRON	0000019001	Approved	10/27/2004	W	PUY12AR	Roth,Andy	AKRON	0000019000	Approved	10/27/2004	W	PUY12AR	Roth,Andy
Business Unit	Requisition ID	Requisition Status	Requisition Date	Origin	Requester	Description																																												
AKRON	0000019014	Pending	11/02/2004	W	PUY12AR	Roth,Andy																																												
AKRON	0000019013	Pending	11/02/2004	W	PUY12AR	Roth,Andy																																												
AKRON	0000019010	Pending	11/01/2004	W	PUY12AR	Roth,Andy																																												
AKRON	0000019002	Approved	10/27/2004	W	PUY12AR	Roth,Andy																																												
AKRON	0000019001	Approved	10/27/2004	W	PUY12AR	Roth,Andy																																												
AKRON	0000019000	Approved	10/27/2004	W	PUY12AR	Roth,Andy																																												

What you do	What happens
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4. Locate the requisition and click on any links for the requisition you want to inquire about.

The Req Doc Status page displays.

PeopleSoft. Home

Req DOC Status

Business Unit: AKRON Req ID: [0000018933](#) Status: Approved

Document Date: 09/17/2004 Document Type: Requisition Budget Status: Valid

Currency: USD Amount: 2.00

Requester: Roth, Andy

Associated Document Customize | Find | View All | First 1 of 1 Last

Business Unit	DOC ID	Document Type	Status	Document Date	Vendor ID	Location
AKRON	0000024583	PO	Dispatched	09/17/2004	0000000019	MAIN OFFIC

Return to Search Next in List Previous in List

5. On this page you can find the following information:
 - Requisition Status (Approved, Denied, Recycled, Pending Approval, Canceled, Complete)
 - Budget Status (Valid, Not Chk'd, Error)
 - Requester
 - Document ID's for Purchase Order, Receipt, Voucher, and Payment

Click on the **DOC ID** link to view the Purchase Order, Receipt, Voucher or Payment. A new page will display with the requested document's information.

The Purchase Order must have a status of Dispatched to be considered a legal commitment by the University to purchase the requested items.


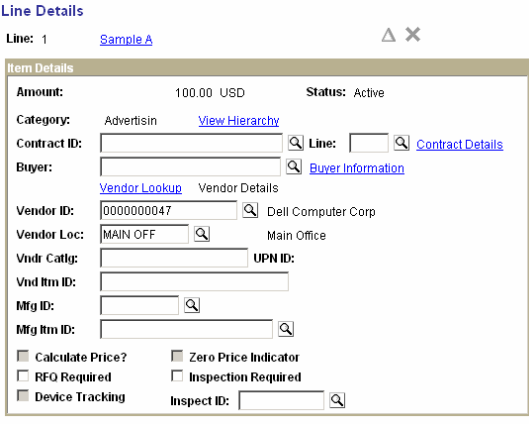
1. : How to Handle Invoices


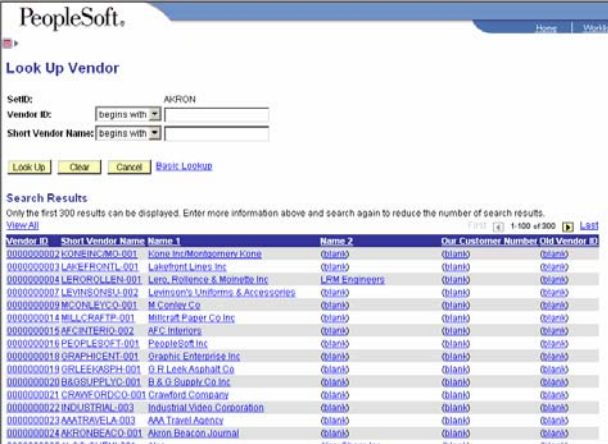
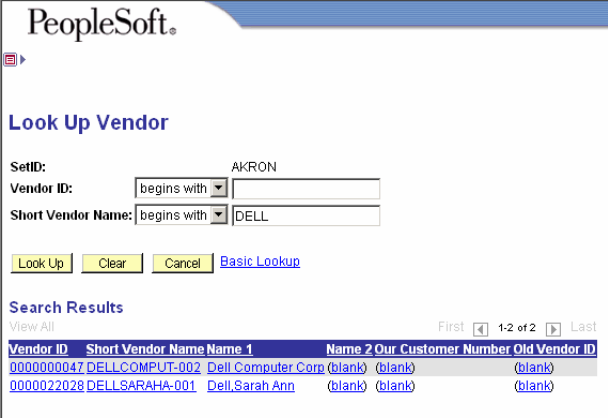
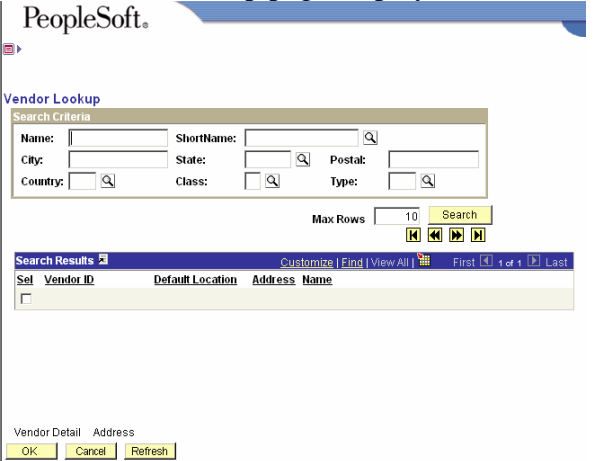
This chapter answers the question, “How do I get an invoice paid?” Under normal circumstances you should have an accompanying Requisition /Purchase Order per the Board of Trustees guideline 3359-20-53.

What you do	What happens
<p>1. Complete a PeopleSoft requisition for the invoice.</p> <p>Be sure to put the invoice number on the Comments page so that Purchasing knows this is an invoice and not an order.</p> <p>Note: There are exceptions to this process. There are “Contracts” set up in PeopleSoft for certain vendors. If you are working with one of these vendors, you can directly submit the invoice to Accounts Payable for payment. These exception invoices must have a SpeedChart written on it and it needs to be signed by the appropriate departmental person (“OK to Pay should accompany the signature.) You can obtain a current list of Contracts by visiting the Department of Purchasing web site.</p>	<p>A PeopleSoft Requisition is created and will be assigned a ReqID number.</p>
<p>2. Send the printed requisition with invoice (with “OK to Pay) to the Department of Purchasing (+9001).</p>	
<p>3. The requisition for the invoice will move through the same steps as any requisition.</p> <p>If the PeopleSoft requisition is approved, it will then go to Budget Checking and then a Purchase Order is created.</p>	
<p>4. A PO Voucher is created in Accounts Payable after receiving the invoice with the proper signature and “OK to Pay.”</p>	

Appendix A Adding a Requisition with One SpeedChart and Multiple Vendors

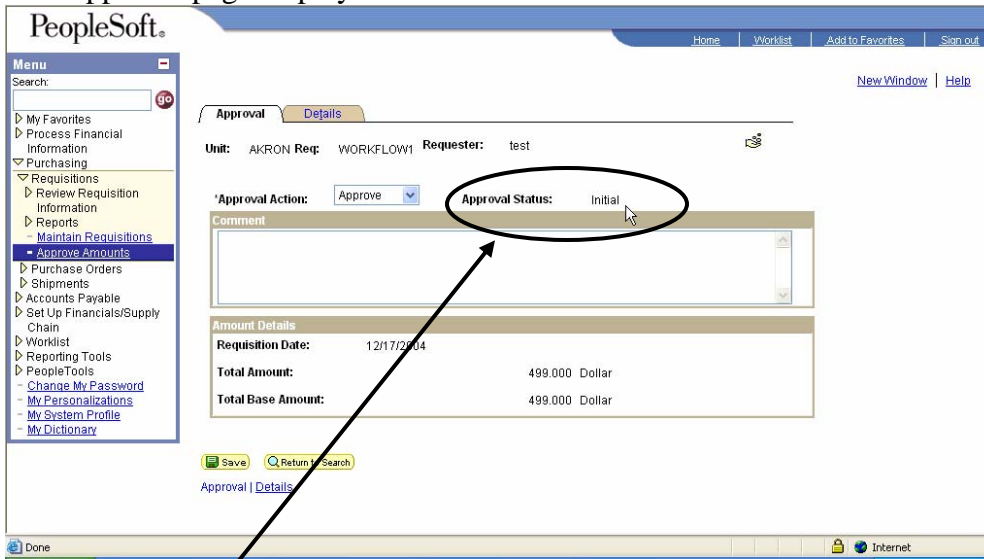
Use this procedure to enter one PeopleSoft requisition when you are using multiple vendors and one SpeedChart. If you use multiple vendors, separate Purchase Orders will automatically be created after Budget Checking (Commitment Control).

What you do	What happens
<p>1. Follow the steps for Type 1 requisitions. The instructions can be found starting on page 3-2.</p>	<p>A requisition is entered.</p>
<p>2. On the Form page, click in the Sel column for the line item that you need to make a Vendor adjustment to.</p>	<p>The Sel field for the item is marked</p> 
<p>3. After you select the Sel checkbox for the item you need to change the Vendor for, click on the Line Details link.</p>	<p>The Line Details page displays. PeopleSoft.</p> 
<p>4. In the Vendor ID field, enter the Vendor ID number. If you do not know the Vendor ID, see Steps 5, 6, and 7.</p>	

What you do	What happens
<p>5. Looking up a Vendor, Option 1: If you do not know the Vendor ID, click on the Look Up Vendor  button.</p> <p>In the Short Vendor Name field, enter the first few letters of the Vendor name and click on the Look Up button.</p> <p>Locate the Vendor, and click on any of the fields (links) to select that Vendor.</p>	<p>The Look Up Vendor page displays.</p>  
<p>6. Looking up a Vendor, Option 2: If you do not know the Vendor ID, click on the Vendor Lookup link.</p> <p>Enter search criteria and click on the Search button.</p> <p>Locate the Vendor, and then click in the SEL checkbox. Click on the OK button.</p>	<p>The Vendor Lookup page displays.</p> 

What you do	What happens
7. Click on OK button to return to the Form page.	
8. Click on the Save button to save the new changes to the line item.	
9. Using the main menu choose: Purchasing, Requisitions, Approve Amounts Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.	

10. The Approval page displays.



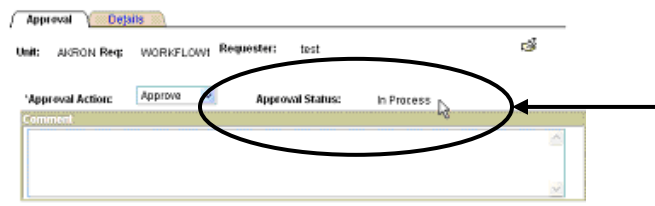
The **Approval Status** field will be Initial.

11. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process”** if you are not an approver.

The status will change to **“Complete”** if you are an approver or if your requisition is under \$500 and you have the limited authority classification.

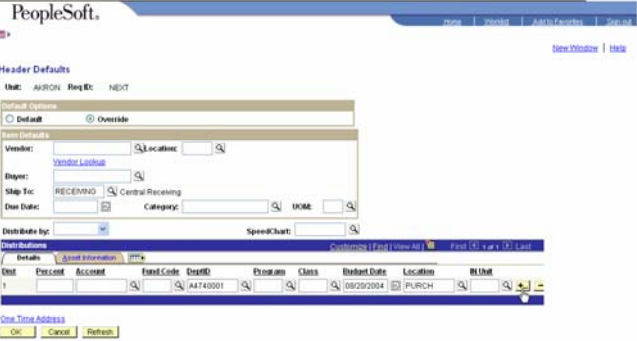

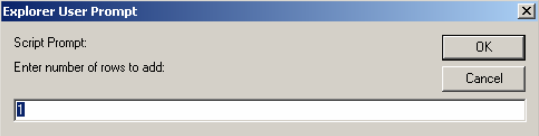
The Approval Status field updates.



What you do	What happens
12. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).	

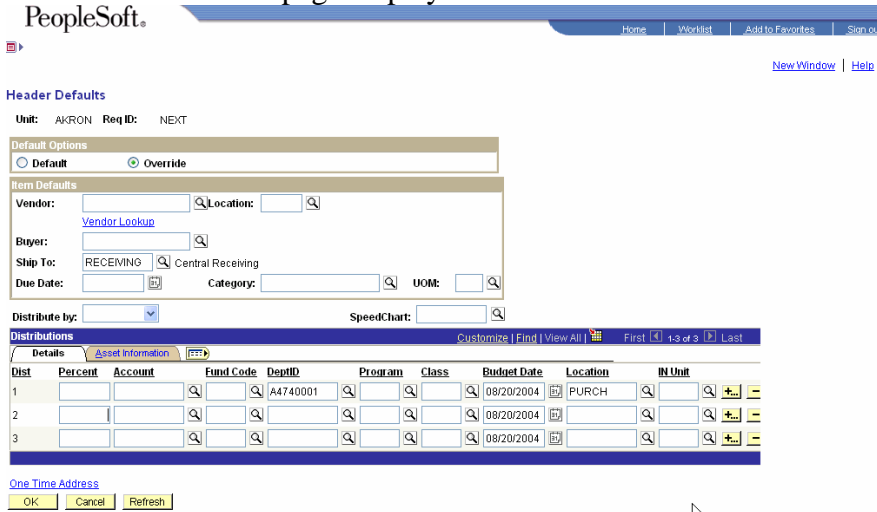
Appendix B Split all Lines of a Requisition to Multiple SpeedCharts

Use this procedure to create one requisition that requires all lines of the requisition to be split across multiple SpeedCharts.

What you do	What happens
<ol style="list-style-type: none"> 1. Follow the steps for Type 1 requisitions. The instructions can be found starting on page 3-2. 	<p>A requisition is entered.</p>
<ol style="list-style-type: none"> 2. Click on the Header Defaults link at the bottom of the Form page. 	<p>The Header Defaults page displays.</p> 
<ol style="list-style-type: none"> 3. Click on the Add multiple new rows  button. 4. Enter the number of additional rows that you will need for this split. Click on the OK button. 	<p>The Explorer User Prompt box displays.</p> 

What you do	What happens
-------------	--------------

5. The Header Defaults page displays with the additional rows.
PeopleSoft.



Note: The Chartfields already filled in the first row are for the SpeedChart that you entered on this page in a prior step.

6. You need to know the Chartfields (Fund Code, DeptID, Program and Class) for the SpeedChart in order to complete this process.

It will be helpful to use the **New Window** link to open another PeopleSoft page when you getting the required Chartfield information.

To locate the Chartfields for the SpeedChart use the following navigation:

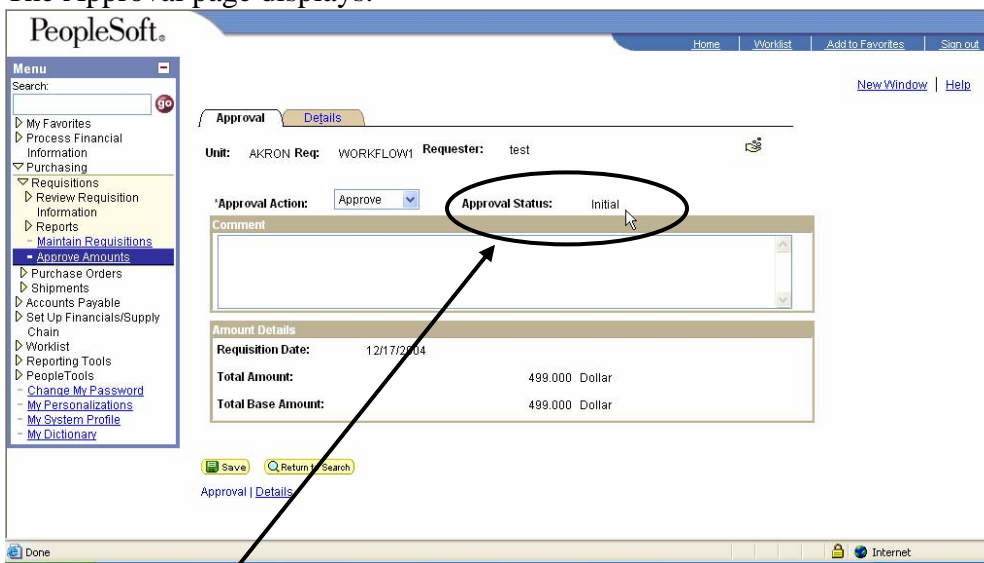
**Set Up Financials/Supply Chain,
Common Definitions,
Design ChartFields,
Define Values,
SpeedTypes**

Note: You will need the Fund Code, Dept ID, Program, and Class from this page.

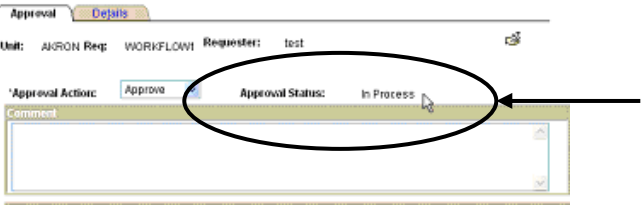
7. On the Header Defaults page, enter the **Fund Code, DeptID, Program,** and **Class** Chartfields for each new row.

What you do	What happens
8. Adjust the Percent field, the percentage you want charged to the SpeedChart, for each row. 9. Click on the OK button.	The Form page displays again.
10. Click on the Save button.	
11. Using the main menu choose: Purchasing, Requisitions, Approve Amounts Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.	

12. The Approval page displays.



The **Approval Status** field will be Initial.

What you do	What happens
<p>13. Click on the Save Button.</p> <p>The Approval Status of your requisition will change to “In Process” if you are not an approver.</p> <p>The status will change to “Complete” if you are an approver or if your requisition is under \$500 and you have the limited authority classification.</p>	<p>The Approval Status field updates.</p>  <p>The screenshot shows the 'Approval Details' page. At the top, there are tabs for 'Approval' and 'Details'. Below the tabs, the page displays 'Unit: AKRON Reg: WORKFLOW1' and 'Requester: test'. The 'Approval Action' section contains an 'Approve' button. The 'Approval Status' is shown as 'In Process', which is circled in black with an arrow pointing to it from the right. Below this is a 'Comment' field.</p>
<p>14. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).</p>	

Appendix C Copy a Requisition

Use this procedure to copy a requisition that you previously entered. This is helpful if you tend to order the same goods or services on a regular basis. You can copy the requisition and then make changes based on your needs.

What you do	What happens
1. From the main menu, choose: Purchasing, Requisitions, Maintain Requisitions Click on the Add a New Value link or the Add a New Value tab.	The Add a New Value page displays.
2. Click on the Add button.	

3. The Form page displays.

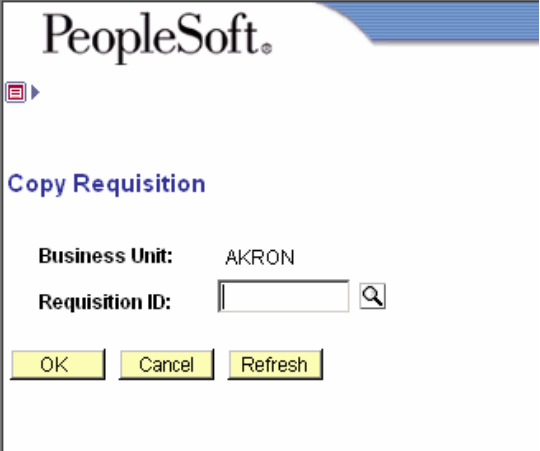
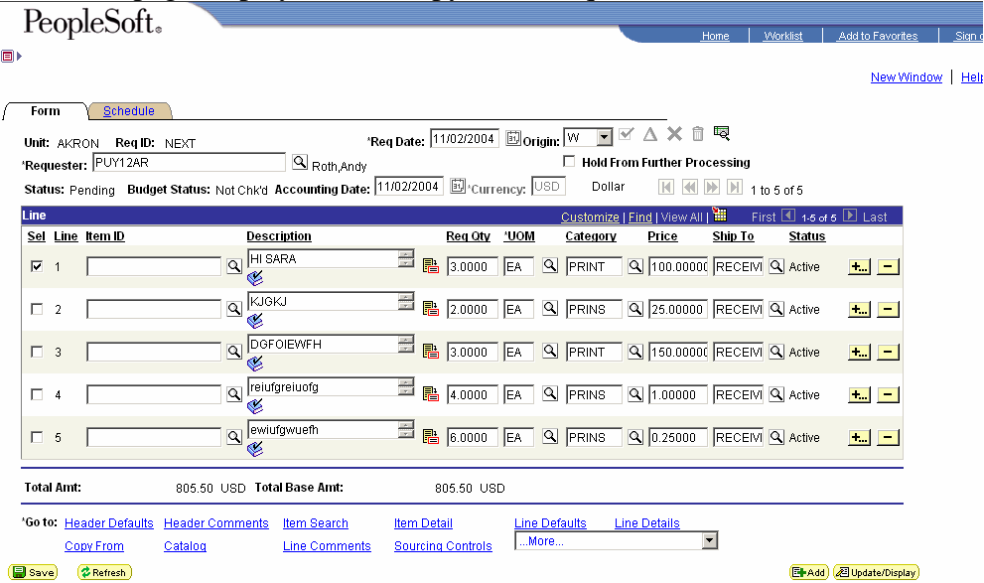
The screenshot shows the PeopleSoft Requisition Form page. The header includes the PeopleSoft logo and navigation links (Home, Worklist, Add to Favorites). The main form area contains the following fields and controls:

- Unit:** AKRON **Req ID:** NEXT **Req Date:** 11/02/2004 **Origin:** ONL
- Requester:** reneereq **Hold From Further Processing:**
- Status:** Pending **Budget Status:** Not Chk'd **Accounting Date:** 11/02/2004 **Currency:** USD Dollar

Line	Item ID	Description	Req Qty	UOM	Category	Price	Ship To	Status
1			0.0000			0.00000	RECEM	Active

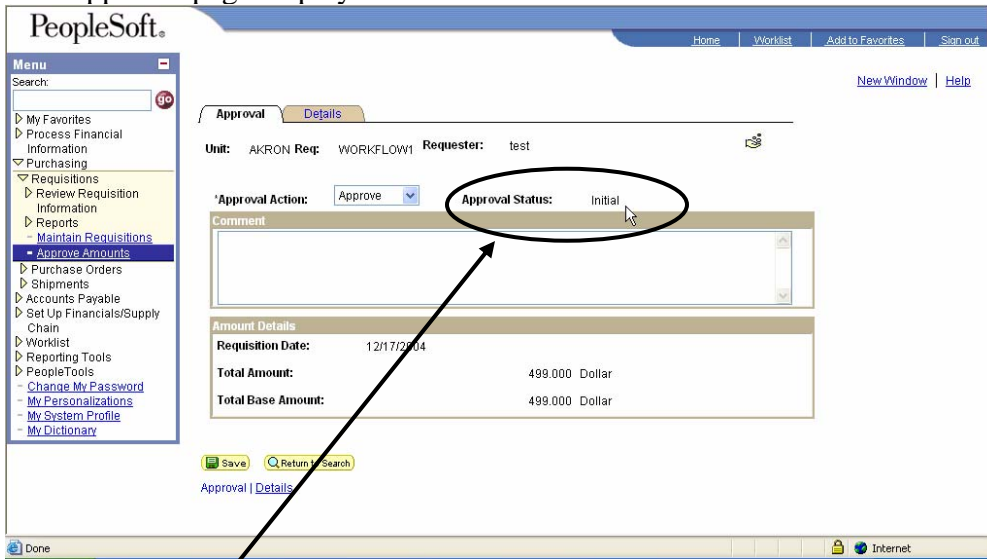
Summary: **Total Amt:** 0.00 USD **Total Base Amt:** 0.00 USD

Navigation: Save, Refresh, Add, Update/Display

What you do	What happens
<p>4. Click on the Copy From link at the bottom of the page.</p>	<p>The Copy Requisition page displays.</p> 
<p>5. Enter the Requisition ID number or use the Lookup button to search for the requisition.</p> <p>6. Click on the OK button.</p>	
<p>7. The Form page displays with a copy of the requisition.</p>	
<p>8. Make any necessary changes to the requisition such as adding lines, deleting lines, adjusting the SpeedChart, changing the Vendor, or adding Comments.</p>	

What you do	What happens
<p>9. Click on the Save button.</p> <p>Note the new Requisition ID (Req ID field) in the top left corner of the Form page.</p>	
<p>10. Using the main menu choose: Purchasing, Requisitions, Approve Amounts</p> <p>Note: If you collapsed the main menu, you will have to use the Expand Menu button to open the main menu again.</p>	

11. The Approval page displays.



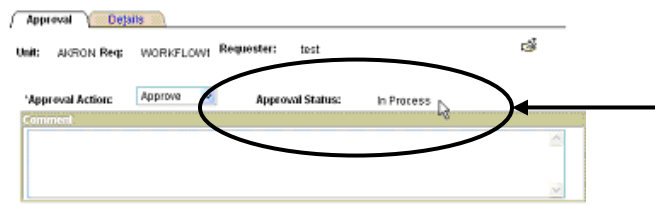
The **Approval Status** field will be Initial.

12. Click on the **Save** Button.

The Approval Status of your requisition will change to **“In Process”** if you are not an approver.

The status will change to **“Complete”** if you are an approver or if your requisition is under \$500 and you have the limited authority classification.

The Approval Status field updates.



What you do	What happens
13. The Requisition is now ready for Approval or for Budget Checking (for Requesters/Approvers).	

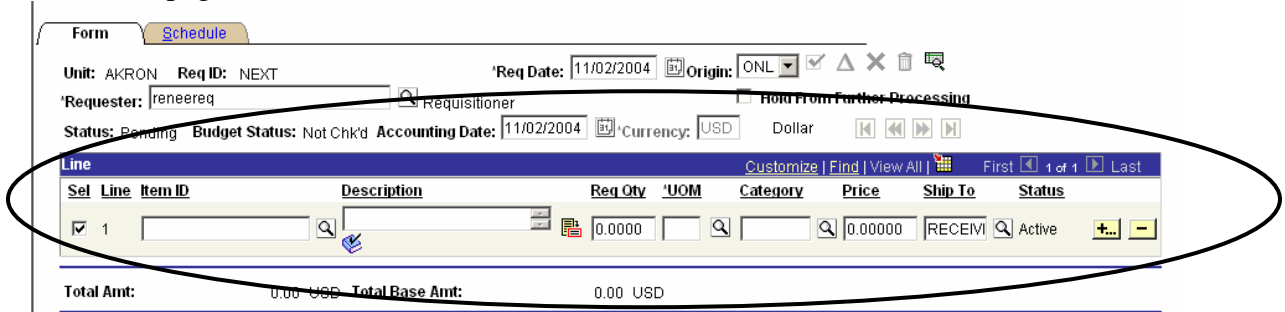
Appendix D Using the Customize Link

You can customize the pages for entering requisitions. This means that you can hide fields that you do not use which will make entering requisitions a lot less confusing. You can do this on the Form page, the Header Defaults page, and the Requisition Inquiry page.

Form Page

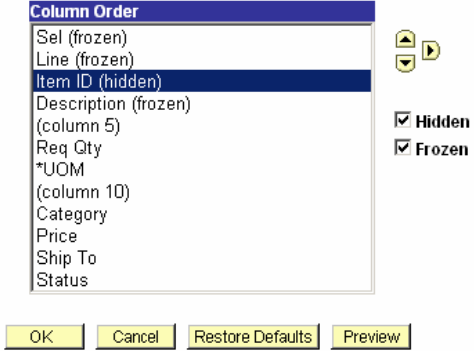

What you do	What happens
1. On the Form page, you can customize the Line frame which is where you enter the line items of the requisition.	

2. The Form page with the Line frame circled:



In this frame, you could hide (remove) the **Item ID** field since that is a field that you do not use when entering a requisition.

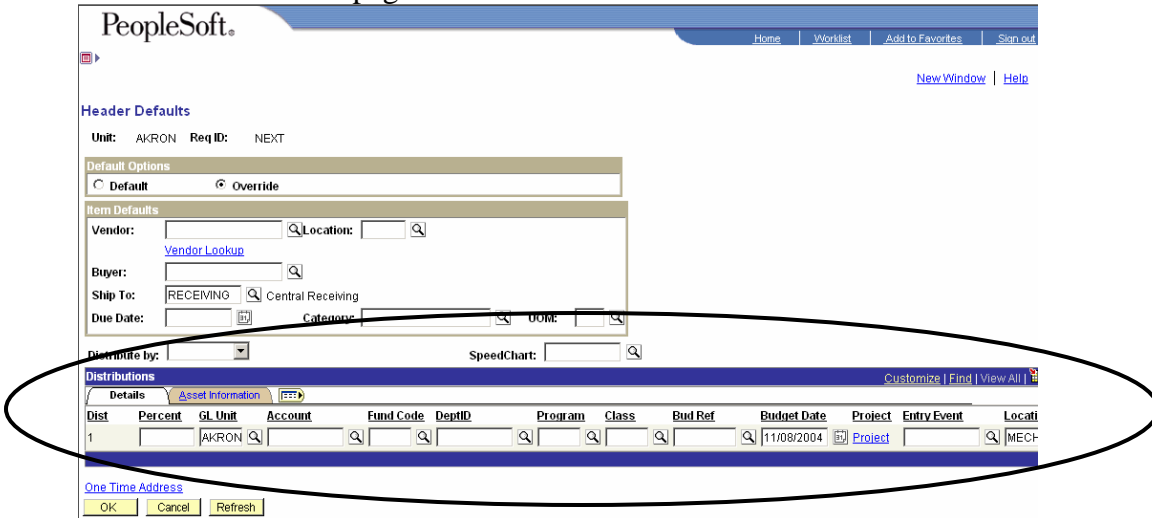
3. Click on the Customize link which is to the left of the View tools.	<p>The Personalize Column and Sort Order page displays.</p>
---	---

What you do	What happens
<p>4. Locate the Item ID field in the Column Order frame and select it.</p> <p>Click in the checkbox, to the right of your selection, for Hidden.</p> <p>You will see (hidden) next to the Item ID field name.</p>	<p>Line</p> <p>Personalize Column and Sort Order</p> <p>To order columns or add fields to sort order, highlight column name</p>  <p>OK Cancel Restore Defaults Preview</p>
<p>5. Click on the OK button to return to the Form Page.</p> <p>Note: You can always come back to this page by clicking on the Customize link again and uncheck the Hidden box to display the field again.</p>	<p>The Form page displays again without the Item ID field displayed.</p> 

Header Defaults Page

What you do	What happens
<p>1. On the Form page, click on the link for Header Defaults.</p> <p>On this page you can customize the Distributions frame which is where the chartfield information defaults after you enter the SpeedChart.</p>	

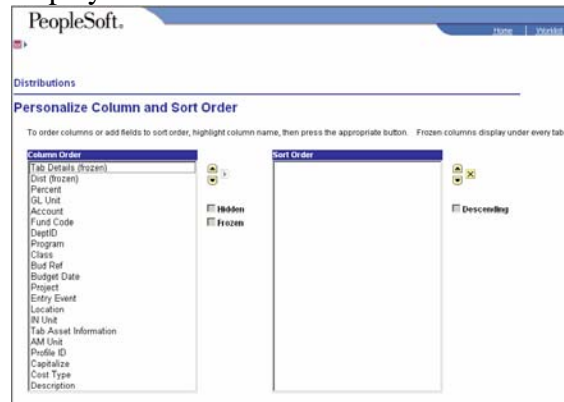
2. The Header Defaults page with the Distributions frame circled:



In this frame, you could hide (remove) the **Bud Ref**, **Entry Event**, and **IN Unit** fields.

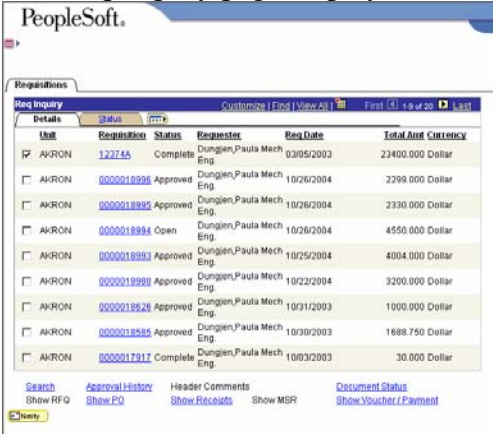
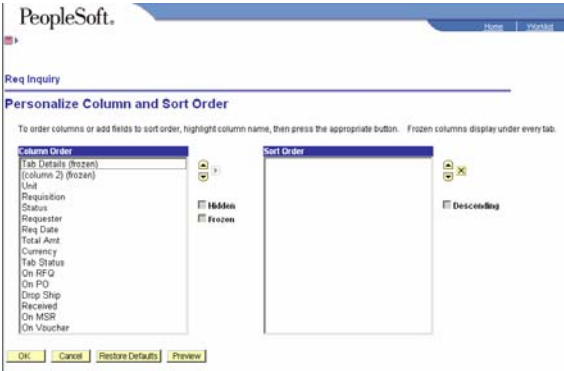
3. Click on the **Customize** link which is to the left of the View tools.

The Personalize Column and Sort Order page displays.



What you do	What happens
<p>4. Locate the Bud Ref, Entry Event, IN Unit fields (one at a time) in the Column Order frame and select it.</p> <p>Click in the checkbox, to the right of your selection, for Hidden.</p> <p>You will see (hidden) next to the field name.</p>	
<p>5. Click on the OK button to return to the Header Defaults Page.</p> <p>Note: You can always come back to this page by clicking on the Customize link again and uncheck the Hidden box to display the field again.</p>	

Requisition Inquiry

What you do	What happens
<p>1. From the menu, choose: Purchasing, Requisitions, Review Requisition Information, Requisitions</p> <p>On the Find an Existing Value page, perform a search using the Search fields.</p>	<p>The Req Inquiry page displays.</p> 
<p>2. On the Details and Status pages, you can customize the view to hide (remove) the fields that are not used at The University of Akron.</p> <p>Specifically, you can hide the Currency, Drop Ship, and ON MSR fields.</p>	
<p>3. You can hide the fields at the same time even though they are on two pages.</p> <p>Click on the Customize link.</p>	<p>The</p> 
<p>4. Locate the Currency, Drop Ship and ON MSR fields (one at a time) in the Column Order frame and select it.</p> <p>Click in the checkbox, to the right of your selection, for Hidden.</p> <p>You will see (hidden) next to the field name.</p>	

What you do	What happens
<p>5. Click on the OK button to return to the Req Inquiry Page.</p> <p>Note: You can always come back to this page by clicking on the Customize link again and uncheck the Hidden box to display the field again.</p>	

Appendix E Miscellaneous Notes

Topic	Notes
Contracts	<p>Contracts, similar to blanket orders, are created in PeopleSoft. If you are working with a Vendor that the University has a contract with, your process will vary slightly. If you are working with one of these Vendors, you can directly submit an invoice (no PeopleSoft requisition is required) to Accounts Payable for payment.</p> <p>The Department of Purchasing posts a list of Vendors for which a contract is set up. You can find this information on the Department of Purchasing web site.</p>
Budget Checking Errors	<p>If your requisition does not pass Budget Checking and has a status of Error you contact The Department of Purchasing.</p>
Requisitions with more than 20 line items	<p>If you need to enter a requisition for more than 20 line items you can submit an Excel spreadsheet with the items to the Department of Purchasing.</p> <p>You still need to complete a PeopleSoft requisition, but you only have to enter one line which is a summary of all the items on the separate list. For example, the line item in PeopleSoft may say, "Miscellaneous Art Supplies."</p> <p>Contact the Department of Purchasing (is known, the appropriate Buyer) for assistance with this process.</p>

Appendix F Locating PeopleSoft Training and Documentation on the Web

The home web page of Software Training and Technological Services contains links to PeopleSoft version 8 instructions:

- Seminars (instructor-led) – Register for classes, such as this one.
- Hard copy manuals and job aids – Download materials that you can print through Adobe Reader.
- Web-based audio-visual tutorials – Watch a movie that leads you through the steps of common procedures in PeopleSoft.
- PeopleSoft manual updates and changes – When a procedure changes or a new procedure is added, a notation will be made in the PeopleSoft Version 8 Manual Log. View the log and download any new/changed materials that are pertinent to your job.

When you are back at your desk, open your browser, such as Internet Explorer, and navigate to <http://www.uakron.edu/its/learning/training/index.php> . Set it as a Favorite so that you easily can check for instructions and updates when needed.

The screenshot shows the website for Information Technology Services (ITS) at The University of Akron. The page is titled "SOFTWARE TRAINING AND TECHNOLOGICAL SERVICES" and provides information about the services offered, including training for administrative and academic software. It lists contact information for Sue McKibben and provides important links for both faculty and staff, as well as students. The page also features a navigation menu on the left and a sidebar on the right with various service links.

SOFTWARE TRAINING AND TECHNOLOGICAL SERVICES

The Software Training and Technological Services unit provides specific training for administrative and academic software used University wide such as PeopleSoft and WebCT.

This group also provides training for widely used software programs.

The STTS staff provides a wide variety of services to help the university community for anything from Microsoft Office Applications to PeopleSoft Software Training provides the support you need.

The staff is ready to help the University community use software technology more effectively.

Email: [Sue McKibben](mailto:Sue.McKibben)
Phone: (330-972-6391)

Important Links for Faculty and Staff

- Seminars
- Mail and Calendar Documentation
- Microsoft Office XP
- PeopleSoft v7.6 - General Information
- PeopleSoft v7.6 - Student Admin Training Materials
- PeopleSoft v7.5 - Financials Training Materials
- PeopleSoft v8 Training - Main Page
- Internet Explorer/Portal Basics
- WebCT Documentation
- Using the Mainframe System (MVS)
- Setting up and using ZipSpace

Important Links for Students

- Mail Documentation
- WebCT Documentation
- Enroll/Search for Classes - Documentation

Navigation Menu: About UA, Admissions, Academics, Administration, Alumni, Athletics, Campus Map, Home

ITS Home

Our Departments

- Applications
- Operations
- Telecommunications
- Networking
- Learning Technologies
- IPLAN

Distance Learning

Computer Based Testing

Help Desk

Software Training

Registration & Info Center

Computer Store

The University of Akron
302 Buchtel Mall
Akron, OH 44325

Learning Technologies

- Learning Technologies
- Design & Development
- Computer Based
- Assessment
- Distance Learning
- Software Training

E-mail Tools

- E-mail Management
- Webmail
- Exchange Web Access

Find People

- ITS People
- UA General Directory

Help Desk

- Help Desk
- Change Passwords
- Download Software
- Reactivate UA.net ID
- Synchronize Password

E-Learning

- Distance Learning
- Courses & Programs
- Instructor Resources
- WebCT Help
- WebCT Login

Registration & Info Center

- Registration & Information Center

Computer Based Testing

- CBT Office
- Lab Hours
- Lab Reservation
- Check Your Reservations