eProcurement Procedures
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Sign in to PeopleSoft

Input your user name and password to log into the PeopleSoft Portal and click **Sign In**. (This is the same user name and password that you use to log into your computer.) The following screen is displayed:
The menu items available on the left side are based on your role for the Colleges and your level of security. To get into the financial system to make a purchase, click Financials in the menu.
The following new window will be opened - you are now logged into the financial system (your list of menu items may look different from the depiction below):
Create Requisition – Special Item
(A Special Item is for the purchase of a good with a quantity and a price for each item.)

**Navigation:** eProcurement>Create Requisition

To create a purchase requisition, a Business Unit and a Requester must be specified. For some users a Requester is not required to be selected (you are setup as a Requester in the system). If this is the case, the screen above will not display. Skip to the documentation on page 7.

If your screen displays as above, use the following steps:

The Business Unit should default to HWS01. Click on the lookup icon to obtain a list of Requesters that you buy for (This list is different for everyone. The picture below is only an example; your list may contain different individuals):
Select the Requester by clicking on their name in the list. The screen will look similar to the one below:

Click on the OK button to proceed.
Creating a purchase requisition is a three-step process. The first is to define the requisition. If this requisition requires special attention by the Business Office, please indicate it by typing in the requisition name field. Some examples are: Confirmation Only, Fax – Do Not Mail or Attachment Required. In addition, change the priority to High by selecting it on the drop-down menu.

For some purchases, you may be required to change where the purchase is to be delivered or the accounting information for where the costs will be charged. This can be done in a couple of ways. The first is by changing the Line Defaults. A change to Line Defaults will enable all lines on the requisition to use the changed shipping or accounting information (see Modify Line Information section of this document for details).

Information that defaults in is based on the Requester of the goods or service. To review or change Line Defaults, click on the next to Line Default and the following screen will be displayed:

The following screen is displayed:
Changes can be made if necessary to any of the information. The changes can be applied to all lines that are created in the requisition.

It is most efficient to select the Vendor for the requisition at this time. In order to do this, click on the search icon next to the Vendor field. The following screen is displayed:

Type a portion of the name of the vendor for which you are creating the requisition then click [Find]. This will bring up a list of vendors whose name contains what you typed. You can select the vendor by
clicking on the Vendor Id link next to the vendor name. Ensure that the address is the correct address for ordering. If it is not, please send an email to Janette Brower at brower@hws.edu with the vendor name and the correct ordering address.

If the vendor you are looking for is not in the system, also email Janette with the name and address information to establish a new vendor in the system. (Note: a new vendor cannot be selected until it is set up in the system, so leave the Vendor field blank in these cases.)

When you are finished with Line Default changes click to proceed to Step 2 of the requisition process.

The page above may be displayed, if it is, click on the tab to add items to the requisition.
Click on Special Item link to add an item to the purchase requisition.

Example for this purchase requisition:
For purposes of this example, the preparer of this purchase requisition needs to buy multiple items: 10 - 250 ml Beakers ($24.21 each), 10 - 100 ml Graduated Cylinders ($19.50 each) and 1 Lab Disc Magnetic Stirrer ($181.49). The vendor for all items is Fisher Scientific (if you selected the Vendor in the Define Requisition step, it will default onto each line of the requisition).

The fields indicated by the red arrows in the screen above are required for each line of a purchase order. For the example items, start with the first one (the Beakers) and complete the required information: Type in
the Item Description (include enough information for the vendor to recognize the exact item you are requesting), Price per item and the Quantity. Click the lookup icon (🔍) next to Unit of Measure and select Each. A Category is required for each line of a purchase requisition. Click the lookup icon (🔍) next to Category; the following screen displays:

Click on the ➡️ next to Search Categories to display the following:
In this expanded Search Categories section, type a few letters of the category you are looking for in the box next to Description and click on **Find** (Note: to find a list of all Categories, just click **Find** without typing in the box). In this example, we used “lab” and the following results were returned:
Select the appropriate Category from the list by clicking on the Category name. For the example, LAB SUPPLIES should be chosen. It is filled into the Category field as follows:

A Vendor must be selected for the purchase requisition (Note: you may have done this in the Define Requisition step. If that was the case, the Vendor would be populated. If not, follow these steps to select a vendor). In order to select a vendor, click the lookup icon (🔍) next to Vendor ID to display the following screen:
Use the Vendor Search Screen to find the vendor from which you are purchasing. For this example type in the first few letters of the vendor name in the Name field and click **Find**.

The search results are displayed:
Click on the Vendor ID link for the appropriate vendor (Special Note: Check to see if the vendor address is correct for ordering purposes. If it is not correct, send an email to Janette Brower at brower@hws.edu with the vendor name and the correct address for ordering). For this example, select Fisher Scientific Co. The Vendor ID will be placed in the requisition.

To finalize this item click the **Add Item** button. The item will be added to the purchase requisition and the fields will be blanked out to enable you to add additional items.
Follow the steps above to add the two other items to the purchase requisition. Note that the items added appear in the Requisition Summary box.

When all of the items have been added, click **3. Review and Submit** to go to the final step of the purchase requisition process:
Modifications can be made at this time to Shipping and/or Accounting information on each or all of the lines. See the Modify Line Information section for details. (Special Note: if you changed the Line Default information in the Define Requisition steps on page 7 and 8 you need to follow further steps in the Modify Line Information section of this document to apply the Line Default changes.)

If you are not finished adding items to the requisition, the button may be used to save the requisition and come back to update it another time.

To submit the finalized purchase requisition, click . The purchase requisition has been created, the confirmation screen displays and it will now go through the approval process, if required.
The purchase requisition is now complete and the approvals and budget check process has begun.
Create Requisition – Fixed Cost Service
(A fixed cost service has a single price for providing a service.)

Navigation:  eProcurement>Create Requisition

The beginning steps of creating a requisition for a fixed cost service are the same as outlined on pages 5 through 9 above.

At the screen above, click on Fixed Cost Service to display the following screen:

Fill in the rows indicated by the red arrows above. Fill in the Service Description using a description that is meaningful. See pages 11 through 14 for detailed steps on filling in Category and Vendor ID fields.
Click on **Add Service** to add the service to the requisition. Continue adding more services to the requisition as required. When you are finished adding services, click on **3. Review and Submit** to move to the next step in the process.

The steps to complete the requisition are detailed on pages 16 and 17.
Modify Line Information

*Navigation: eProcurement>Create Requisition*

If you are creating a requisition and chose to change the Line Default information discussed on pages 7 and 8 above, follow these steps to apply that Line Default information to lines of the requisition.

To apply the Line Default information to all lines of the requisition, check each of the line using the check box to the far left of each line (to apply it to certain lines only, select only the lines you wish to change):

Click on [Modify Line / Shipping / Accounting], the following screen displays:
Click on the link **Load Values From Defaults** in order to bring over the accounting and/or shipping information you previously entered into the Line Default section (Note: only the information you previously entered will fill in, all other information will be left blank).

Click **Apply** to apply the information to the lines of the requisition. The following screen displays:
Ensure that the button next to All Distribution Lines is selected and click **OK**.

You will be returned to the Review and Submit screen. Follow the instructions above on page 16 to complete the requisition.
Favorites

Navigation: eProcurement>Create Requisition

Items from your requisitions may be added to your Favorites for a specific Requester to be used in future requisitions. Using Favorites eliminates the need to type in items each time a requisition is created.

Add an Item to Favorites:

Using the steps in pages 5 through 16 above to create a requisition and to get to the Review and Submit step in the process as depicted below:

To select an item to add to favorites click on the check box next to the items you want to add. For example:

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>250 ml Beakers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>100 ml Graduated Cylinders</td>
</tr>
</tbody>
</table>

Then click Add to Favorites. The item is added to the Favorite list and the following confirmation is displayed:
Using Favorites to Add Items to a Requisition:

Use the step in pages 5 through 8 to create a requisition. Instead of selecting Special Request, select Favorites. The favorites that have been added for the requester are displayed:

To add a favorite to the requisition change the Quantity to the desired amount and click Add. The item will be added to your requisition in the amount specified.
Receive Items

There are two methods that can be used to receive items. The first is using the Receive Items screen. The second is using the Manage Requisitions screen. Both methods are detailed below:

**Navigation:** eProcurement>Receive Items

Method 1: Items eligible for receiving will be displayed when the above navigation is followed:

Select the check boxes for the items that were delivered from the vendor. For the example, all items were received on the same day. Because of this, click on **Check All**. Each box next to the items will be selected. Click on **Receive Selected** to begin the receiving process:
In the Received Qty field for each line, enter the amount received (if each of the quantities agrees to what was received no changes need to be made.) Click **Save Receipt** to finalize the receiving process. The following message is displayed:

```
Windows Internet Explorer

⚠️ Receipt, 00000000157, is saved and Job, RECV_00, has been scheduled for process (Process Instance = 7715). (10300, 283)

This means the receipt is being updated by the receipt integration process. Any additional processing for this receipt will require reopening the receipt in Update / Display mode.

OK
```
**Navigation:** eProcurement > Manage Requisitions

Method 2: Receiving items can also be on a requisition by requisition basis. Follow the navigation above to the following screen:

Find the requisition for which you have received goods or services (you could have received all or only a portion of the goods or services). Click on the <Select Action> drop down and choose Receive Order. Then click **GO** to be taken to the Receive Items screen noted previously on page 26. Not that the items listed are only items from the particular requisition you have selected. Follow the steps on pages 26 and 27 to complete the receiving process for this purchase requisition.
Manage Requisitions

*Navigation: eProcurement/Manage Requisitions*

The manage requisitions function can be used to view the status of your requisitions. The screen above consists of two parts: a search component (the top half) and a results component (the bottom half). Use the search area to narrow your search for requisitions then click [Search]. The results are displayed.
To get more detailed information click on the ▶ next to the Requisition ID. The lifespan information for your requisition is displayed. If your requisition has reached a particular stage in the process, that stage will appear as a blue link. If your requisition has not reached a particular stage of the process, that stage will appear gray and no link will exist.
Approve Requisitions

Certain individuals are required to approve purchase requisitions based on various criteria. If you are required to approve purchase requisitions an email notification will be sent directly to you. (Important note: it is possible that this message will show up in your Junk Mail box.) A message similar to the following will notify you that a requisition requires your approval:

From:  
To:  
Cc:  
Subject: Approvals Requested for Requisition ID '0000000012' Line 'L1 Business Unit: Hubert & William Smith'

A requisition line has been entered which requires your attention.

Requestor:  
Business Unit: Hubert & William Smith
Requisition ID: 0000000012
Requisition Name: 0000000012
Line: 1
Description: Sony Flat Screen Monitor
Date: 2008-08-31

You can navigate directly to the approval page by clicking the link below.

http://gs-gp-fin-tst.boxer.edu:8080/psp/ps/EVENT/EMPLOYEE?SPF/c/PV MAIN_#H60.PV REQ_APPROVAL#CtAction=#BUSINESS_UNIT#-#S_01#REQ_ID#0000000012#LINE#NEB#-1

Click the link provided in the message to be redirected to the Financials module of PeopleSoft and sign in using your usual user name and password. You will be taken to the item that requires approval similar to the following:
Review information pertaining to the items by clicking the links for the item description. If you are satisfied with the item, select it using the check box to the left. When you are finished checking each line that needs to be approved click or . If you choose to deny a line of the requisition then comments must be added in the following box:

An email notification will be sent to the individual who originated the requisition indicating whether it is approved or denied (with the accompanying comments if it is denied).