FAQ's
Requisition/Purchase Orders

How do I track whether my requisition has been sourced to a PO?

Follow the navigation below:
eProcurement > Manage Requisitions

Under Search and Sort Requisitions, enter as much information as you can to narrow your search.
Requisition Name - enter the requisition number or name you are searching for
Status – Select from the drop down list the status of the requisitions you wish displayed
Requester - enter the user ID of the person who created the requisition
Date From/Through Date - enter date range the requisition was created in
Click 'GO'

- *The requisition(s) matching the criteria you entered above will appear. Valid status's are: Pending, Approved, Deny, Hold, PO(s) Dispatched*

If the requisition you are searching for displays a status of PO(s) Dispatched, your requisition has been sourced to a PO and the PO has been dispatched to the vendor

- *On the Line displaying the status of PO(s) Dispatched, click on the requisition link*
- *The Requisition Details page appears, click on the yellow triangle* 

- *This will display the PO number, PO Status, Vendor, Receipt Status, PO Line number, PO Schedule number, Due Date, Ship To, Quantity, and Price.*

How do I create a requisition?

Refer to the training manual you received during eProcurement Training, or The Material Support Web Site for the procedures on Creating a Requisition.

How do I print a requisition?

Follow the navigation - Purchasing > Requisitions > Reports > Print Requisition

The Requisition Print page appears, Click on Add New Value and enter a 'Run Control' ID of REQ_PRINT and click ADD

If this is the first time you are performing this function, click the Add a New Value tab and create a Run Control ID. Click the Add button.
Thereafter, use the Find an Existing Value tab and enter the run control you created. Click the Search button.

- *Enter the Business Unit – CASE1*
- *Select the Requisition you want to print from the drop down listing of requisitions*
- *Enter From Date (if applicable)*
- *Enter Through Date (if applicable)*
- *Enter Requestor (if applicable)*
- *Statuses to Include – select the status(s) you want included*
- *Determine if you want to include any requisitions 'On Hold'*

Click RUN

- *Select Server Name – PSUNX*

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Under the Process List

- *Ensure the Select Box is checked next to the Requisition Print SQR*
- *Ensure the Type is 'Web'*
- *Ensure the Format is 'PDF'*

Click OK
You will see the Process Instance number displayed under the Process Monitor (note the number for reference)
Click the Process Monitor
The first line should be the process you're running (confirm the process instance number matches the number you noted)
Click the Refresh button intermittently until the run status displays Success
Click the details link
Click View Log/Trace
Click the PORQ010 Link - The PDF document of the requisition appears
Print the requisition.

How do I check whether the requisition has been approved?

Follow the navigation – eProcurement > Manage Requisitions >

Under Search and Sort Requisitions, enter as much information as you can to narrow your search.
Requisition Name - enter the requisition number or name you are searching for
Status – Select from the drop down list the status of the requisitions you wish displayed
Requester - enter the user ID of the person who created the requisition
Date From/Through Date - enter date range the requisition was created in
Click 'GO'
The requisition(s) matching the criteria you entered above will appear. Valid status's are: Pending, Approved, Deny, Hold, PO(s) Dispatched

Click the Approval Status Icon  *to view the status of your requisition*
The Requisition Approval Status page appears, you can view online where your requisition is and it's status.

How do I approve a requisition?

When a requisition is complete and the user clicks the Save and Submit button on the Requisition Summary page, the Run Initialize Workflow process is launched and the requisition is submitted to workflow for approval. This process evaluates every workflow rule and the initial steps within it. When the criteria of a workflow step matches the requisition, a worklist entry is sent to the approver.

- *Login to PeopleSoft*
- *At the top of the screen you will see a link for Worklist*
- *Click the Worklist Link*
- *All items requiring your approval will appear i.e., Requisitions, Journals, etc.*
- *Click on the link you wish to review/approve*
- *The Requisition Approval page appears*
- *You can select one of three statuses (Approve/Deny/Hold)*

Add Approvers/Reviewers

- *If you elect to have other(s) review/approve this requisition, you can add an additional approver/reviewer by selecting their user ID from the drop down menu.*

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Requisition Information

- *To review the requisition click on the View Request Details (this will give you the Requisition Detailed Summary)*
- *Click the Return to previous page (takes you back to the Requisition Approval page).*
- *After reviewing the requisition you can elect to Approve, Deny, or Hold the requisition.*

What should I do if there's no PO for my requisition?

Follow the navigation – eProcurement > Manage Requisitions >

Under Search and Sort Requisitions, enter as much information as you can to narrow your search.
Requisition Name - enter the requisition number or name you are searching for
Status – Select from the drop down list the status of the requisitions you wish displayed
Requester - enter the user ID of the person who created the requisition
Date From/Through Date - enter date range the requisition was created in
Click 'GO'
The requisition(s) matching the criteria you entered above will appear.

*Click the **Cycle** button to access the Requisition Cycle page where you can view where your requisition is located in the requisition cycle*.

Click the **Approval Status** button to access the Requisition Approval Status page where you can review the approval status of your requisition.

What are the requirements for Security Access?

- *You must complete the required Financials Training courses for the security access you are requesting.*
- *Upon completing the required Financials Training, you must request access by completing the appropriate Security Access Form before an ID and password will be granted.*
- *Deans, Chairs, Directors and above can request access to the new CASE Financials system for themselves and their staff. Security access will be granted upon completing the Mandatory Financials Training class*.

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I get an error when I'm trying to budget check a requisition. What is the problem?

Check for these potential issues:
1) Are the Fund and Program fields populated? (If not the speedtype was probably not used. Put the department (or project) value into the SpeedType field, click the lookup button, then select the speedtype.)
2) Is there a value in both the Department and Project field? (Department was probably defaulted from user's profile, and usually needs deleted, since requisition is probably against the project.)
3) Is the Account field zero's or all nine's? (If so, delete the value in the Account field, delete the value in the Alternate Account field then click the yellow Refresh button at the bottom of the page. Enter the correct Account, which usually starts with a 5.)

Why isn't my requisition sourced to a purchase order?

There are several reasons your requisition may not be sourced to a purchase order: 1) The requisition must be Approved and Budget Checked with a Budget Status of valid.

How do I cancel a purchase requisition?

Only approvers have their security setup to cancel a requisition. Here are the steps on canceling a requisition:

1. Click the red "x" on the top right corner of your Form tab.
2. Budget Check the requisition to relieve the monies from pre-encumbrance
***NOTE** Requisitions that have been sourced to a purchase order cannot be canceled**.*

Where can I find the training manual?
You must complete the required Financials Training course(s). A Training Manual will be provided in class.

When requesting items without specifying vendor, will the system automatically give a name on the screen or will it give us a list of vendors to choose from?
NO!
Click the Vendor Lookup Link, this will take you to the vendor search page.
Enter the first two letters of the vendor name and click FIND

Click the Select Vendor button to select and display the selected vendor in the Vendor ID field on the Special Request page.
Suggest a Vendor
This vendor is attached to the requisition line that you create.
After a suggested vendor is added to a requisition line, the buyer sees the Suggested Vendor button on the Requisition Expediter page for that line. The buyer can reject the suggested vendor or add the new vendor to the vendor catalog.

If you need an item, but aren't requesting it from a specific vendor, you have the option to leave the vendor blank, thereby allowing purchasing to choose the best vendor.

What are the matching methods defined for CASE Financials?

2-way match - in accordance with the rules that were defined during the design phase, the system checks the quantity and price on the originating purchase order before the voucher will pay and post. A variation of the 2-way match is called the blanket rule, in which only the total *price of the PO is checked; if the current transaction exceeds that value, the match process will prevent the voucher from posting.*

3-way matching - this process includes every component of a 2-way match and adds the requirement that any line item of $5,000 and over MUST be received by the requestor. The receiving process creates and enters a receiver number into the system, after which the voucher will pay and post.