PeopleSoft 8.4 Quick Reference Guide

Entering a Requisition for a Good

1. From the left-hand navigation, select eProcurement.

2. Select eProcurement Home Page.

The eProcurement Home Page appears.

3. Click Create Requisition.

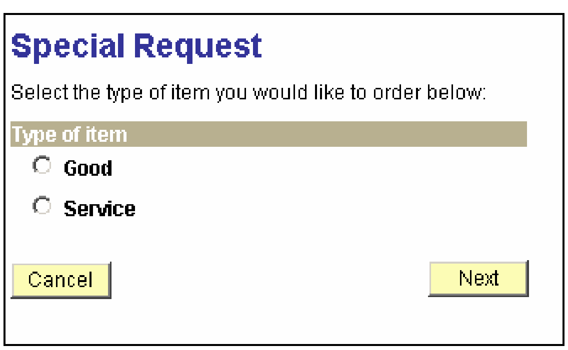
The Requisition Summary page appears.

4. Enter a Requisition Title (optional).

This will help you identify your requisition. If you do not make an entry, the Requisition number will be used.

5. Click Special Request.

The Special Request page appears.



6. Click the **Good** radio button.

7. Click Next.

The Special Request – Goods page appears.

8. Enter a description of the item needed.

The description format must include: catalog#, descr, size (if applicable).

9. Click the magnifying glass for the Category field.

The Lookup Category page appears.

10. Select the appropriate item Category code.

11. Enter the quantity needed in the Qty field.

12. Enter the Unit of Measure for the item.

13. Enter the Price per unit of measure for the item.

14. Verify that USD is the Currency field.

15. Enter the date you need the item in the Due Date field.

16. Click the Vendor Lookup hyperlink.

The Vendor Search page appears.

17. Enter search criteria to locate the vendor in the vendor table:

- ◊ *All or a portion of the vendor name*

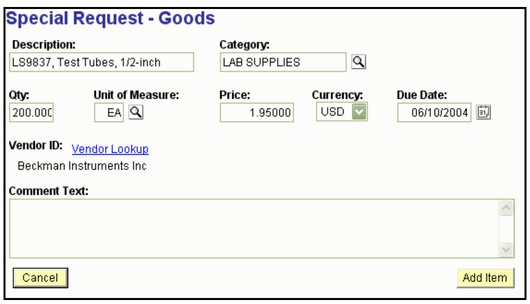
- ◊ *City where the vendor is located*
- ◊ *State where the vendor is located*
- ◊ *All or a portion of the vendor zip code*

18. Click Find.

The results that match the criteria appear in the Search Results list.

19. Click ✔ (Select Vendor) on the vendor line to use for this requisition item.

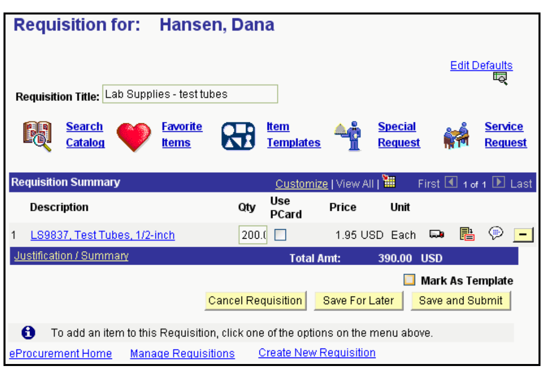
The Special Request – Goods page reappears with the selected Vendor.



20. Enter any Comment text needed to appear on the requisition. This is information that may be helpful to the Purchasing group to process the requisition. You may also select this information to be printed on the purchase order to send to the vendor.

21. Click the Add Item button.

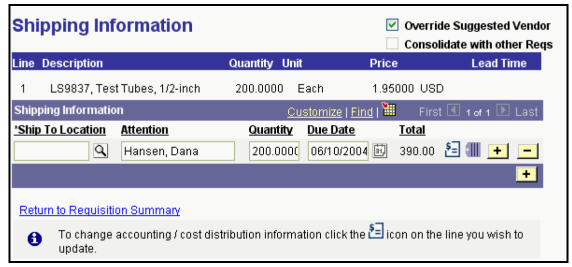
The Requisition Summary page appears.



Each line of your requisition must be updated with the shipping and cost distribution information.

22. Click the (Shipping Info icon).

The Shipping Information page appears.



23. If the Shipping location is a standard CASE location, select the Ship To location and skip to step 31.

24. If it is a one-time ship to location (non-CASE location), click the (One Time Address icon).

The One Time Shipping Information page appears.

25. Enter the Country where the shipping address is located.

The remaining address lines become available in the format for that country.

26. Enter the correct, one-time shipping address.

27. Click Return.

The Shipping Information page appears.

28. If the requested items are going to multiple locations and or people, click the + button and repeat steps 26 through 32.

29. Click (Cost Distribution Info icon).

The Distribution Information page appears.

30. Select the Amt or Qty in the Distribute by field.

31. Click [Look Up icon] to select the Speed Type.

The Look Up Speed Type page appears.

32. Type the beginning characters for your SpeedType and click **Look Up**.

The available SpeedTypes appear in the Search Results.

33. Click the link of the SpeedType you will use.

The Distribution Information page appears with the information from the selected Speed Type.

34. Enter the Account.

35. Enter the Event, if applicable.

36. For split funding on the requested items, click the **+** button, enter the Quantity or Amount, and repeat steps 36 – 40 for each additional distribution.

37. Click the Return to Shipping Information hyperlink

The Shipping Information page appears.

38. Click the Return to Requisition Summary hyperlink

The Requisition Summary page appears.

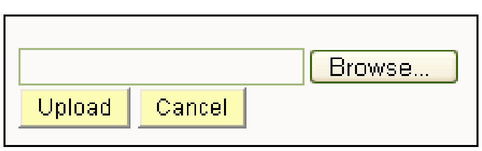
39. Click [Comments icon] (Comments icon).

The Comments page appears with any comments that you entered on the Special Request.

40. Turn on the send comment to vendor checkbox if you want the comments to be printed on the purchase order to be sent to the vendor.

41. Click **Add Attachment** if you want to attach a document that further clarifies this request.

A page appears to select the document you want to send.



42. Click **Browse...** to locate your document.

The Choose file dialog box appears.

43. Locate the file and click **Open**.

44. Click **Upload**.

The Line Comments page appears with your attachment.

45. For additional requisition items, follow steps 8 through 55 as needed.

46. If your requisition is $2,500 or higher, click Justification/Summary on the Requisition Summary pageto enter a justificationl.

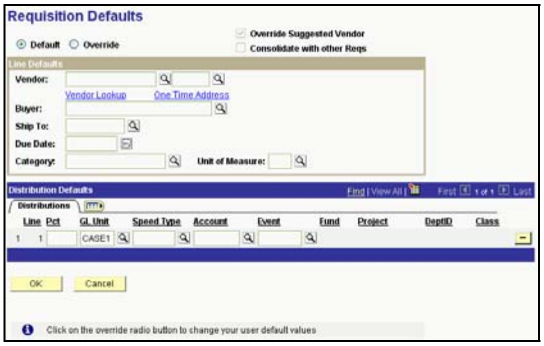
47. Once all items and details have been recorded for the requisition, click **Save and Submit**.

The requisition is saved and submitted to workflow approval. A message appears at the bottom of the Requisition Summary page with your Requisition number. You may want to note this number for future reference.

Using Edit Defaults

Instead of entering your vendor, ship-to and distribution information on each line, you can set all of this information up before you begin your requisition.

1. On the Requisiton Summary page, click Edit Defaults.



2. Enter information in one or more of the fields that will apply to all of the lines on your requisition:

3. Click 

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The Edit Defaults page closes and as you enter each line, the information entered there will be applied to each line of the requisition.

If you complete Edit Defaults after you have lines on your requisition, a message will appear asking if you want to apply the defaults to the lines already entered. Read the information carefully and click those that apply.