

# **PeopleSoft Implementation Project**



Business Process Documentation eProcurement Requester

# Requisition Entry, Manage Requisitions, Copy Requisitions, Cancel a Requisition, and New Year Instructions

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VERSION	DATE	NAME	COMMENTS
1.0	12/5/2016	Aaron Dise	UAT
1.1	2/7/2017	Denise McDonald	Updated Per Training Feedback
1.2	10/10/2017	Denise McDonald	Updated Per Training Feedback



## **Steps for the System**

# Log into SFS to Create Requisition

eProcurement Requisitions are created in SFS. Most people use SFS to enter and/or approve Expense reports. This is the same system. If you are not a current SFS user, go to the below link to access SFS.

https://portal.sfs.wisconsin.edu

If you have trouble logging in, please reach out to your Business Unit Admin or contact Security using the below link. <u>https://www.wisconsin.edu/sfs/security/</u>

# Create a Requisition

You can create a requisition using the below steps or you can use the copy function for faster entry. Using the copy function allows you to take an existing requisition, copy to a completely new requisition identified by a new requisition ID, and modify it as needed. The end result is the same however, the primary advantage with copying is the chart fields from the previous requisition will automatically be populated on the new requisition.

#### IF YOU WOULD LIKE TO CREATE A REQUISITION USING THE COPY FUNCTION, GO TO COPY REQUISITION SECTION OF THESE PROCEDURES, OTHERWISE PLEASE PROCEED WITH STEP 1.

1. Follow the below navigation to create a requisition. Enter a Requisition Name. Use a name that is descriptive and meaningful.

#### Main Menu > eProcurement > Create Requisition

Create Requisition							
1. Define Requisition		2. Add Items and Services		3. Review and	3. Review and Submit		
Specify requisition name, requester, and other information that applies to the entire requisition.							
Business Unit:	UWADM	UW System Administration					
Requester:	adise		DISE, AARON - CONSULTANT	*Currency:	USD		
Requisition Name:				Priority:	Medium •		
Line Defaults ??							
Continue							



Review and Submit

3. Click the Special Item link.

Shared Financial System			
vorites Main Menu >	eProcurement > Create F	Requisition	
Create Requisit	ion		
1. Define Requ	isition 📑	2. Add Items and Services	3. Review and Submit
dd lines to the requisition	, specifying the information n	ecessary to procure each item or service.	
earch:			Search
Catalog <u>F</u> avorites	Templates Forms	Web Special Request	
Special Item			
Itom Description	Special Item		
Dricou	100 00000	*Curropovi	LISD
Price:	3,0000	-Currency:	635
Quantity:	0000	- Unit of Measure:	
Category:	0000	Due Date: Suggest New Vendor	
Vendor ID:		<u>ouquernew vendor</u>	
Vendor Name:	AAHPERD		
vendor item ID:			
Mfg ID:	Q		
Manufacturer:			
Mfg Item ID:			
Additional Information			Request New Item
Special Item from new	vendor	(I) (K)	Request New Item
Send to Vendor	Show at Rece	eipt Show at Voucher	
Add Item Ca	ancel Add or S	Start New Type	

- 4. From the Special Requests page, enter the following Information. Please note, the fields marked with an "\*" are required inputs.
  - a. \* Item Description. **Please insert as much information as you can about the product/service you are requesting.** For example the model #, terms, **contract information, and any other pertinent information.**
  - b. \* Price



- c. \* Quantity
- d. \* Category defaults to 0000. It can be updated or will be updated by Purchasing. Use the magnifying glass if not using the default.
- e. Currency defaults to USD and cannot be updated.
- f. \* Unit of Measure defaults to EA can be updated or will be updated by Purchasing as needed. Use the magnifying glass if not using the default.
- g. Use the magnifying glass to enter in the Vendor ID or Vendor Name if you have it. Otherwise, this will be added by the Buyer. This is not a required input by the requester.
- 5. You can also enter comments in the box under "Additional Information." Please use this space for any information you may typically write on paper requisitions today.

Shared Financial System	eProcurement > Create Requisition			
Create Requisit	ion			
1. Define Requ	isition 📑 🗧 2. Add	I Items and Services	3. Review and Submit	
Add lines to the requisition Search:	, specifying the information necessary to <u>T</u> emplates Forms <u>W</u> eb S	o procure each item or service.	Q Search	
Special Item				
*Item Description:	Special Item			
*Price:	100.00000	*Currency:	USD	
*Quantity:	3.0000	* Unit of Measure:		
*Category:	0000 Q	Due Date:	31	
Vendor ID:		Suggest New Vendor		
Vendor Name:	AAHFEIND			
Mfg ID:	٩			
Manufacturer: Mfg Item ID:				
Additional Information			Request New Item	
Special Item from new	vendor		Request New Item	
Send to Vendor	Show at Receipt	Show at Voucher		
Add Item Ca	Add or Start New 1	Гуре		

6. After entering in the information, click Add Item. The below shopping cart should display the order as requested.

Some browser versions may not allow this to display. You can still proceed. Just make sure you see your items on the Review and Submit page.



Requisition Summary				
Description	Qty		UOM	
Special Item		3		EA
Total Lines:			1	
Total Amount (LISD)			3	00.00

To add additional items, click Add Item again.

7. When you are done adding items, click 3. Review and Submit

🚖 👿 Annual Benefits Encoline. 🕘 intermediate-ps-query 🕘 basic-ps-query 🕘 Encumbrance Journal, D 📼 PeopleSoft Purchasing 9.1 🖻 PeopleBooks 🔯 myuw-system Work Record SC Legal Holidays 🚻 Intro to WISDM, W	/ISER 🐻 UW Box 🌃 Shared Financial System ( »
Hanner Shared Financial	Home   Worklist   Add to Favorites   Sign out
Favorites Main Menu > eProcurement > Create Requisition	
Create Requisition     Create Requisition     L Add Items and Syrvices     Add Items     Add Items and Syrvices     Add Items and Syrvices     Add Item	Ip         Requisition Summary           Description         Qty         UOM           Del Dimension 4300 Series PC         2         EA           Totel Lines         1
Business Unit:         UWADM         UW System Administration         *Currency:         USD           Requester:         0055685         MCDONALD, DENISE         Priority:         Medium         •           Requisition Name:         UWADM Test Regulation 1         MCDONALD, DENISE         Priority:         Medium         •	Total Amount (USD): 1,500.00
Requisition Lines 20	
Lane Levelander Strate Reing Scient Comments and attachments	
▽         1         Dell Dimension 4300 Series PC         DELL COMPUTERS         2.0000         EACH         750.00000         1,500.00         €.	
Consolidate with other Reqs Z Override Suggested Vendor	
Shipping Line:     1     Due Date:     Image: Constrainty:     2.0000     Price:     750.00000     Image: Constrainty:       Status:     Active     *Ship To:     Q     Modify/Creating Address       Attention To:     Image: Constrainty Constrainty     Image: Constrainty     Image: Constrainty	
usuluur by. UV v speeuchint. U	
Accounting Lines Personate (Pard Vew at P 1 to res C1 or 1 Line) Personate (Pard Vewat P 1 to res C1 or 1 Line) Personate (Par	
Constant Office Constant Const	
Line Jatura Orskrype Loadon Quanny Percent mechanime anti ol. Oni	
Select.All Total Amount: 1,500.00 USD	
🕒 ≽ Add to Favorites 🛝 Add to Template(s) 🔂 Modify Line / Shipping / Accounting 🗍 Delete	
Comments @	
(J)	
Send to Vendor Show at Receipt Shown at Voucher Approval Justification	
CT Check Budget	
Save & submit Save & preview approvals X Cancel regulation Find more items	

8. Click  $\stackrel{\frown}{\simeq}$  to add Attachments and Line Comments. You can upload multiple

attachments. Select Add Attachment for each attachment. Click OK once all documents and commentary have been attached. This will return you to the submit page. If you have issues uploading the attachment, make sure the name on the attachment is not too long.

	TEM		
Financial			
Favorites Main Menu > eProcur	ement Create Reguisition		
Create Requisition			
Line Description	Quantity Unit	Price	
1 Dell Dimension 4300	2.0000 EACH	750.00000 USD	
			Gar <sup>un</sup>
Send to Vendor	Show at Receipt Show	w at Voucher	
Add Attachment			
Attachments	Find	View All   🖾   📶 🛛 First 🚺 1-2 o	2 D Last
Address of File	User/Date Time	View Send to Vendor	
Attached File			
1 TEST6_Attachment.xlsx	008568552016-12-09-14.15.51.843	View	E

9. Select to add the appropriate Ship To, Location, and chartfield combo information.

Favorites Main Menu > eProcurement >	Create Requisition					
Create Requisition	2. Add Items a	and Services		3. Review and Sub	mit	
Review the details of your requisition, make any necessary changes, and submit it for approval.         Business Unit:       UWADM       UW System Administration       *Currency:       USD         Requester:       00856855       MCDONALD, DENISE       Priority:       Medium 🗸         Requisition Name:       UWADM Test Requisition 1       1       Medium 🗸						
Requisition L Description	Vendor Name C DELL COMPUTERS	Quantity	UOM EACH	Price 750.00000	Total	
Select All / Deselect All	Add to Template(s)	Modify L	ine / Shipping / Ac	Total Amount:	1,500.00 USD Delete	
Comments 2						
Check Budget	Save & preview approvals	× Cancel r	requisition	Find more items		

- 10. If this is your first time entering a requisition, go to step 11. If this is not your first time and you have already personalized your view, go to step 13. THIS STEP IS OPTIONAL.
- 11. Click the carrot to expand and display the below.



Business Unit:	UWADM UW System Administration		*Currency: USD
Requester:	adise	DISE, AARON - CONSULTANT	Priority: Medium *
Requisition Name:			Mediani 1
Requisition Lines 👔			
Line Description	<u>Vendor Name</u>	Quantity UOM	Price <u>Total</u>
	CDW-G	3.0000 EACH	100.00000 300.00
Consolidat	te with other Regs 🛛 🗹 Over	ride Suggested Vendor	
Shipping Line:         1           Status:         Active           Attention To:         D	Due Date: *Ship To: ISE, AARON - CONSULTANT	Quantity: 3.0     Modify Onetime Address	000 Price: 100.00000 🕀 📼
*Distribute By: Qt	y v SpeedChart:	٩	
Accounting Lines Chartfields1 Chartfields2	2 Details Details 2 Asset Informa	tion Asset Information 2 Budget I	nformation
Line Status Dist	Type *Location Quant	ity Percent	Merchandise Amt GL Unit
1 Open	Q	3.0000 100.0000	300.00 UWADM Q 🛨 🖃
Select All / Deselect All			Total Amount: 300.00 USD
Add to Favorit	es 🕒 Add to Template(s)	Modify Line / Shippin	g / Accounting 🗍 Delete
Comments 👔			
Send to Vendor	Show at Receipt S	hown at Voucher 📃	Approval Justification
💭 Check Budget			



12. Select Personalize as highlighted above to add all chartfields on one page. Adjust the fields as shown below. Click OK.

Tab Chartfields1	*		*
Line			
Status			
Dist Type		_	
GL Unit			
*Location		Hidden	
Account			
Fund		Frozen	
Dept			
Program			
Quantity			
Percent			
Merchandise Amt			
Tab Chartfields2			
Class			
PC Bus Unit			
Project			
Activity			
Affiliate			
Tab Details			
Stat			
Open Qty			
GL Base Amount			
Tab Details 2			
Currency			
Exchange Rate Detail			
Tab Asset Information			
AM Business Unit			
Profile ID			
Tag Number			
CAP #			
Sequence			
Empl ID			•
• -			

- 13. Enter the following chartfields. The magnifying glass allows you to select from a list of available variables.
- Ship To
- Location
- Account
- Fund
- Dept
- Program



Hanning Shared System System	
Landinge   Juan Juan 2 Theorem Landing - Cheere vertinging	? Help
Create Requisition	
L. Define Requisition 🗄 2. Add Items and Services 3. Review and Submit	
Review the details of your requisition, make any necessary changes, and submit it for approval.	
Business Unit:     UWADM     UW System Administration     *Currency:     USD       Requester:     00856855     MCDONALD, DENISE     Priority:     Medium v       Requisition Name:     UWADM Test Requisition 1     MCDONALD, DENISE     Priority:     Medium v	
Requisition Lines (2) Line Description Vendor Name Quantity II/M Pilce Total	
□     1     Dell Dimension 4300 Series PC     DELL COMPUTERS     2.0000     EACH     750.00000     1,500.00 €       □     Consolidate with other Reqs     ☑     ☑     Override Suggested Vendor	
Shipping Line:     1     Due Date:     IP     Quantity:     2.0000     Price:     750.00000       Status:     Active     *Ship To:     Q     Modify Onetime Address       Attention To:     MCDONALD, DENISE       *Distribute By:     Qty     SpeedChart:     Q	
Accounting Lines	
Union     Status     Distribution     Quantify     Percent     Merchandise Ant     GL Unit       1     Open     Q     2.00000     100.0000     1.500.000     UVADM     T	
Select All / Deselect All     Total Amount: 1,500.00 USD     Add to Favorites     Add to Favorites     Add to Template(s)     Modify Line / Shipping / Accounting     Delete	
Comments @	
Send to Vendor         Show at Receipt         Shown at Voucher         Approval Justification	
Check Budget	
්ස Save & submit iš Save & preview approvals X Cancel requisition Find more items	

14. Under the Accounting Lines Section, select the second tab "Chartfields2." The below will display. Enter a valid chartfield combination. If you need assistance finding a valid chartfield combination go to the link in step 16. *If you enter in a Project number you have to enter in Business Unit in the PC Business Unit field. It will just be your SetID, i.e. UWADM or UWSYS.* 

avorites       Main Menu → eProcupen         Edit Requisition	hent > Manage Requisitions	and Services	3. Review and Sul	omit
Review the details of your requisition,	make any necessary changes, and s	ubmit it for approval.	*	
Business Unit: UWS Requester: 00856 Requisition Name: sampl	UW Systemwide	MCDONALD, DENISE	*Currency: Priority:	USD Medium V
Requisition Lines 😰	Vendor Name	Quantity LIOM	Price	Total
	other Reqs 🗹 Overrid	2.0000 EACH	500.00000	1,000.00
Shipping Line:     1     E       Status:     Active     **       Attention To:     MCDON       *Distribute By:     Qty	Due Date:     []       Ship To:     BOR       ALD, DENISE       SpeedChart:	Quantity: 2.1     Modify Onetime Address	DODO Price:	500.00000 🛨 💻
Accounting Lines		Perso	nalize   Find   View All   🗖   🛗	First 🚺 1 of 1 🕨 Last
Chartfields1 Chartfields2 D Account Fund 3702 Q 136 Q	tails Details 2 Asset Information Dept Program 400960 Q 6	Class PC Bus Unit	Project	Actin
Select All / Deselect All			Total Amount:	1,000.00 USD
Add to Favorites	Add to Template(s)	Modify Line / Shippi	ng / Accounting	Delete
Comments 👔	Show at Receipt Sho	wn at Voucher	Approval Justification	
Check Budget		Budget Checking Status	Not Checked	



- 15. Look over the requisition one more time. If you are OK with all the inputs, you are ready to submit.
- 16. Click Save & submit . If you receive an error message on the chart field combinations, please find an accurate combination and re-submit. Go to the department manager or youR Accounts Payable Group to find a valid chartfield combination. If you still have issues, go into WISDM (Main Menu/Other/Funding Validation/Inquiry) for chartfield assistance. https://wisdm2.doit.wisc.edu/wisdm2/EditQuery/EditQuery.aspx
- 17. Once the requisition is successfully submitted, the required approvals prior to Purchase Order creation will be displayed. Your are done.

Each Approver will receive an automated email indicating they need to approve a requisition. Once all the Approvals are received, you will receive an email indicating the requisition has been fully approved.

Department Approva	al			
Line 1:Pen DRAWER DIVID	ding ERS			
Department Approval				
Pending Employee, E UW ePro Leve	XMRG74 I 1 approver			
Controller				
✓ Line 1:Awa DRAWER DIVID	iting Further Approv	als		
Controller				
Not Routed Employee, E UW ePro Leve	XMRG60 I 2 approver			
Buyer				
	iting Further Approv	als		
Buyer				
Not Routed Auditor, EXA UW ePro Leve	UD60 I 3 approver			
Submit	Edit Requisition	Apply Approval Char	naes Check Budaet	

If you would like to view the progress of the requisition, go to the Manage Requisitions page. The instructions are listed on the next page.



# Manage Requisitions (View Status, Lifespan, and Perform Actions on the Requisitions)

The below navigation will allow you to view the status and the lifespan of the requisition. You can also perform actions on the requisition(s).

### Main Menu > eProcurement > Manage Requisitions

#### View Status of Requisition

1. Enter in criteria to select the requisition(s) you want to review. You can search by:

Business Unit	Requisition Name
Requisition ID	Requests Status (i.e. Approved, Completed, etc.)
Date From	Date To
Requester (Employee ID)	POID

2. Once you click Search, the requisitions will appear. The Status column provides the status of the requisition.

T	search requisit	one, edit the criteria hel	ow and click the t	Pearsh button					
- 10	o locate requisit	INVMI	ow and click the s	Search bullon.		_/			_
B	Isiness Unit:	DAAMIE	Requisit	ion Name:	All but Complete				
	to From:	06/14/2016	Request	Status:	06/21/2016				
	alle From.	adise	Date 10.	Dv:	00/21/2010	PO ID:			_
	equester.	auise	Q Lintered	by.		1018.			
	Search	Clear							
Re	quisitions 👔								
To To	view the lifespar edit or perform a	n and line items for a re mother action on a requ	quisition, click the Jisition, make a se	Expand triang	le icon: e Action drapdown list and click G	D.			
	Reg ID	Requisition Name	BU	Date	Statu	Total			
⊳	000000017	000000017	UWMIL	06/20/2016	PO Partially Created	2,075.00 USD	<select action=""></select>	•	
⊳	000000016	000000016	UWMIL	06/20/2016	Pending	500.00 USD	<select action=""></select>	•	
⊳	000000015	000000015	UWMIL	06/20/2016	Pending	500.00 USD	<select action=""></select>	•	
⊳	000000014	000000014	UWMIL	06/20/2016	Pending	500.00 USD	<select action=""></select>	•	
⊳	000000013	000000013	UWMIL	. 06/20/2016	Open	4,500.00 USD	<select action=""></select>	•	
⊳	000000012	000000012	UWMIL	. 06/20/2016	Open	50,500.00 USD	<select action=""></select>	•	
Þ	000000011	000000011	UWMIL	06/20/2016	Open	5,175.00 USD	<select action=""></select>	•	
Þ	000000010	000000010	UWMIL	06/20/2016	Open	50.00 USD	<select action=""></select>	٣	
⊳	000000009	000000009	UWMIL	. 06/20/2016	Pending	4,500.00 USD	<select action=""></select>	•	
⊳	000000008	000000008	UWMIL	06/20/2016	Pending	5,625.00 USD	<select action=""></select>	•	
⊳	000000007	000000007	UWMIL	06/15/2016	Pending	4,500.00 USD	<select action=""></select>	•	
Þ	000000006	000000006	UWMIL	06/15/2016	Pending	500.00 USD	<select action=""></select>	•	
⊳	000000005	000000005	UWMIL	. 06/15/2016	Pending	1,000.00 USD	<select action=""></select>	•	
⊳	000000004	000000004	UWMIL	06/15/2016	Approved	125.00 USD	<select action=""></select>	•	
⊳	000000003	000000003	UWMIL	06/15/2016	Approved	125.00 USD	<select action=""></select>	٣	
Þ	000000002	000000002	UWMIL	. 06/15/2016	Approved	50.00 USD	<select action=""></select>	•	



#### **Type of Status**

Pending – Waiting on Approvals

- Approved Requisition has been approved, but purchase order has not been created
- Open Saved, but not submitted

PO Created – Purchase Order has been created

PO Dispatched – Purchase Order has been dispatched

#### View Lifespan of the Requisition

3. Click <sup>▶</sup> to view the Lifespan of the requisition. You can click on any highlighted icon to get more details on the stage. For example you can see the Approvals by clicking the Approval icon. You can click on Purchase Orders to get more details on the Purchase Order. Once the purchase order is paid, you can click on the Invoice or Payment icon to get payment and invoice details.



Once the requisition moves through entire "Lifespan" the link(s) all icons will be available for review.

#### **Perform Actions on a requisition**

- 4. The following actions are available.
  - a. Copy Requisition
  - b. Edit Requisition
  - c. View Approvals
  - d. View Printable Version
  - e. Cancel Requisition



#### 5. Select the Action and Click "Go" to trigger the action.

	Reg ID	Requisition Name	BU	Date	<u>Status</u>		1	<u>Fotal</u>			
$\bigtriangledown$	00000000	17 000000017	UWMIL	06/20/2016	PO Partially Cr	eated		2,075.00 US	Select Action>	Ň	Go
	Requester:	EDISE, AARON - CONSULTANT	Entered E	By: DISE CON	AARON - SULTANT	Prior Change Request	rity: Mediun Receiving	n Returns	Select Action> Copy Requisition Edit Requisition View Approvals View Printable Ve Invoice	rsion Payment	
	Line Inform	nation						Personali	ze   Find   🗖   🛗 Fin	st 🚺 1-3 of 3 🛙	Last
	Line	Description	s	status	Price		Quantity	UOM Vendor			
	1	Software Installation Servic	F	O Created	75.00000	USD	1.0000	EA UNIVE BOOKS	RSITY STORE	×	
	2	Adobe Acrobat	A	pproved	500.00000	USD	3.0000	EA ADOB	E SYSTEMS INC	×	
	3	2-tier Software Installation	F	O Created	100.00000	USD	5.0000	EA CDW (	GOVERNMENT	×	

#### **Copy Requisition**

Allows you to take an existing requisition and copy it for the creation of a new requisition. If a requisition is DENIED you cannot make updates to the requisition and re-submit it. You have to create another requisition. The copy function gives you an easy way to do this. You can copy the denied requisition, make the appropriate corrections/updates and re-submit.

#### **Edit Requisition**

Allows you to edit an existing requisition. Once you edit it, the approval process starts all over.

**View Approvals** – Displays the approvers on the requisition **View Printable Version** 



# Copy Requisition (Used to create a NEW requisition and can be used to resubmit a DENIED requisition)

The copy function is an efficient way to create new requisitions when some or all of the required fields are the same as existing requisitions. This is also an efficient way to handle denied requisitions.

1. Follow the below navigation to get to the Manage Requisition Screen

Favorites Main Menu >	eProcurement	> Manage Requisitions					
Manage Requis	itions						
To locate requisitions, e	dit the criteria belo	w and click the Search button.					
Business Unit:		Requisition Name:					Q
Requisition ID:		Request Status:	Complete	$\checkmark$	Budget Status:		~
Date From:	02/03/2017	🗓 Date To:	02/10/2017	24			
Requester:		Q Entered By:		Q	PO ID:		Q
Search	Clear						
The Requ	ester specified has	no Complete Requisitions.					
Create New Requisition	Revie	ew Change Request	Review Change Tracking		Manage Receipts	Requisition Report	

#### Main Menu > eProcurement > Manage Requisitions

- Search for the requisition to copy using one or more of the below criteria.
   Business Unit Requisition Name
   Requisition ID Requests Status (i.e. Approved, Completed, etc.)
   Date From Date To
   Requester (Employee ID) PO ID
- 3. Find the requisition to copy, select "Copy Requisition", and hit "Go."

Shared Financial											
Main Men	u > eProcurement :	Manage Reguisit	tions								-
ige Req	uisitions										
h Requisiti	ons										
ate requisitio	ns, edit the criteria below	w and click the Sea	rch button.								
ss Unit:		Requisition	Name:							Q	
ition ID:		Request Sta	atus:	Pending	~	Budget Sta	atus:			~	
rom:	02/03/2017	Date To:		02/10/201	7 🕅						
ster:		C Entered By			Q	PO ID:				Q	
iearch itions 🕜	Clear										
the lifespan	and line items for a requ	uisition, click the Ex	pand triangle	icon:		Þ					
or perform a	nother action on a requis	sition, make a selec	tion from the	Action dropdow	n list and click Go.						
<u>eq ID</u>	Requisition Name	BU	Date	<u>Status</u>	Budget	<u>Total</u>					
00000071	000000071	UWSYS	02/09/2017	Pending	Not Chk'd	100,000.00	USD 🖸	opy Requisition	✓	Go	
00000070	000000070	UWSYS	02/09/2017	Pending	Not Chk'd	2,500.00	USD <	Select Action>	~	Go	
00000069	Aaron's Stuff	LINNENCE	02/00/2017	Dendine		1 500 00	usp <	Select Action>	$\sim$	Go	
0000000	riaron o otan	000515	02/09/2017	Pending	Not Chird	1,500.00	000		•		
00000068	Johns Dept for xyz	UWSYS	02/09/2017	Pending	Not Chk'd	500.00	USD <	Select Action>	~	Go	
	Shared Financial System Main Men Uge Req In Requisitions so Unit: ition ID: rom: ster: iearch titions ? the lifespan or perform a ser ID 00000071 000000070	Shared Financial System Main Menu > eProcurement : Ige Requisitions ate requisitions, edit the criteria below ase Unit: ition ID: rom: 02/03/2017 ster: iearch Clear fitons @ the lifespan and line items for a requi- se ID Requisition Name 00000071 0000000071 000000070 0000000070	Shared System         Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         at requisitions, edit the criteria below and click the Seares         ss Unit:          Requisition (Requisitions)         ats requisitions, edit the criteria below and click the Seares         ss Unit:          Requisition (Requisitions)         attor requisition, edit the criteria below and click the Seares         ss Unit:          (Requisition for the Requisition for the Requisition, click the Example for perform another action on a requisition, make a selecter         the lifespan and line items for a requisition, make a selecter          Ell Requisition Name         BU          Requisition Name          Ell Requisition Name         BU00000271          000000071          UWSYS         00000070	Shared System         Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         Inge Requisitions         ate requisitions, edit the criteria below and click the Search button.         ss Unit:          Requisition Name: ition ID:         ition ID:          Requisition Name: Requisition Name: itions @ the lifespan and line items for a requisition, click the Expand triangle operform another action on a requisition, make a selection from the sea ID:         Requisition Name          BU          Date D	Shared System         Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         Inge Requisitions         ate requisitions, edit the criteria below and click the Search button.         as Unit:         Image Requisition Name:         Ition ID:         Image Requisition Name:         Image Requisition Name: <td>Shared System       Shared System         Main Menu &gt; 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eProcurement &gt; Manage Requisitions         Inge Requisitions         Inger Requisitions         ate requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisition Name:         ition ID:       Request Status:         Pending       Budget Status:         rom:       D2/03/2017         Entered By:       PO ID:         cearch       Clear         the lifespan and line litems for a requisition, click the Expand triangle icon:       P         or perform another action on a requisition, make a selection from the Action dropdown list and click Go.         tstill       Date       Status         D00000071       UVSYS 02/09/2017       Pending       Not Chk/d         000000071       UVSYS 02/09/2017       Pending       Not Chk/d       2,500.00 USD Copy Requisition&gt;         000000071       UVSYS 02/09/2017       Pending       Not Chk/d       2,500.00 USD Copy Requisition&gt;</td> <td>Shared   System   Main Menu &gt; eProcurement &gt; Manage Requisitions   In Requisitions   Ith Requisitions   ate requisitions, edit the criteria below and click the Search button.   set unit   Requisition Name:   2003/2017   Bate To:   2010/2017   Bate To:   2010/2017   Entered By:   Pol ID:   each   Clear   Ithered and line items for a requisition, make a selection from the Action dropdown list and click Go.   set ID   Requisition Name   BU   Date   Status   Dobuboro71   UWSYS   000000071   UWSYS   0209/2017   Pending   Not Chick   1000000071   1000000071   1000000071   1000</td>	Shared System       Shared System         Main Menu > eProcurement > Manage Requisitions         Ingerequisitions         Ingerequisitions         ate requisitions, edit the criteria below and click the Search button.         set unit       Requisition Name:         Ition ID:       Request Status:         Opencing       Request Status:         Ition ID:       Request Status:         Ition ID:       Entered By:         Itions @       Entered By:         Itions @       Itions for a requisition, click the Expand triangle Icon:         Itions @       Requisition Name         BU       Date       Status         D00000071       UWSYS       02/09/2017         Pending       Not Chcid         D00000070       UWSYS       02/09/2017         Doubloor21       000000071       UWSYS       02/09/2017         Doubloor20       Accents Stafe       Not Chcid	Shared System       Prinancial System         Main Menu > eProcurement > Manage Requisitions         Ingeregatisitions the requisitions         ste requisitions         ate requisitions         ste requisitions ()         Requisition Name:         Image: Status         Image: Status	Shared System         Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         Inger Requisitions         ste requisitions, edit the criteria below and click the Search button.         se Unit:	Shared System       Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         Inger Requisitions         ate requisitions, edit the criteria below and click the Search button.         set unit       Requisition Name:         ition ID:       Requisition Name:         ition ID:       Request Status:         Pending       Budget Status:         ition ID:       Request Status:         ition ID:       Entered By:         ition ID:       PO ID:         ition ID:       Entered By:         ition ID:       PO ID:         ition ID:       Status         Budget Status:       Forlation         coperior Another action on a requisition, make a selection from the Action dropdown list and click Go.         estop ID:       Estatus       Budget	Shared System         Main Menu > eProcurement > Manage Requisitions         Inge Requisitions         Inger Requisitions         ate requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisitions, edit the criteria below and click the Search button.         ste requisition Name:         ition ID:       Request Status:         Pending       Budget Status:         rom:       D2/03/2017         Entered By:       PO ID:         cearch       Clear         the lifespan and line litems for a requisition, click the Expand triangle icon:       P         or perform another action on a requisition, make a selection from the Action dropdown list and click Go.         tstill       Date       Status         D00000071       UVSYS 02/09/2017       Pending       Not Chk/d         000000071       UVSYS 02/09/2017       Pending       Not Chk/d       2,500.00 USD Copy Requisition>         000000071       UVSYS 02/09/2017       Pending       Not Chk/d       2,500.00 USD Copy Requisition>	Shared   System   Main Menu > eProcurement > Manage Requisitions   In Requisitions   Ith Requisitions   ate requisitions, edit the criteria below and click the Search button.   set unit   Requisition Name:   2003/2017   Bate To:   2010/2017   Bate To:   2010/2017   Entered By:   Pol ID:   each   Clear   Ithered and line items for a requisition, make a selection from the Action dropdown list and click Go.   set ID   Requisition Name   BU   Date   Status   Dobuboro71   UWSYS   000000071   UWSYS   0209/2017   Pending   Not Chick   1000000071   1000000071   1000000071   1000



4. The below screen will appear. You can go directly to the Review and Submit tab if no changes are needed. Otherwise, update the Requisition Name and/or the item information. To update the item information, click the link with the item.

Shared Financial System								
Favorites Main Menu > eP	rocurement > Manage I	Requisitions						
Create Requisition								
1. Define Requisit	ion 🔄	2. Add Items and	d Services		3. Review and S	Submit		
Review the details of your requ	uisition, make any necessa	ry changes, and subr	nit it for approval.					
Business Unit: Requester: Requisition Name:	UWSYS UW System	wide	ICDONALD, DENIS	ŝE	*Currency: Priority:	USD Medium V		
Requisition Lines 🙆								
Line Description	<u>Ven</u>	dor Name	Quantity	<u>UOM</u>	Price	lotal		
D 1 Nicole's stuff	CDV	/-G	2.0000	EACH	50,000.00000	100,000.00 📭	2	
Select All / Deselect All					Total Amount:	100,000.00 USD		
🖵 🔔 🛛 Add to Favori	tes 🖏 Add	to Templatete,	Modify L	ine / Shipping / Ac	counting	Delete		
Comments 😰								
							17	
Send to Vendor	Show at Receip	t Shown	at Voucher		oval Justifica.			
Check Budget	Save & pre	view approvals	× Cancel	equisition	Find more items	Click to updat information, i	e item f required.	

5. The item screen will appear. You can update anything on this page. Once you make all the updates, hit OK.

Shared Financial System	iu > eProcurer	nent > Manage Requisitions		
Create Requ	isition		me and Sonvices	2 Poviou and Submit
Add lines to the requisers to the requisers and the contract of the requisers to the requisers the requisers to the requisers the requisers to	isition, specifying ites <u>T</u> emplat	g the information necessary to pro-	ial Request	Search
Special Item *Item Description:	chan	ged Nicole's stuff to new stuff		
*Price: *Quantity: *Category:	0000	2.0000	*Currency: * Unit of Measure: Due Date:	EA Q
Vendor ID: Vendor Name:	0000 CDW	-G Q	Suggest New Vendor	
Vendor Item ID: Mfg ID:		٩		
Mfg Item ID: Additional Inform	ation			Request New Item
			1200	☐ Request New Item
OK	dor Cancel	Add or Start New Type	Show at Voucher	



6. Select the carrot to expand the requisition.

1. Define Requisition	2. Add Items	and Services	3. Review and Sub	omit
Review the details of your requisition, mail	e any necessary changes, and s	submit it for approval.		
Business Unit: UWSYS Requester: 00856855 Requisition Name:	UW Systemwide	MCDONALD, DENISE	*Currency: Priority:	USD Medium V
Requisition Lines 👔				
Line <u>Description</u>	Vendor Name	<u>Quantity</u> <u>UOM</u>	Price	Total
1 changed Nicole's stuff to r	CDW-G	2.0000 EACH	50,000.00000	100,000.00 🔡 💭
Select All / Deselect All			Total Amount:	100,000.00 USD
Add to Favorites	Add to Template(s)	Modify Line / Shi	ipping / Accounting	Delete
Comments 😰				

7. You can go directly to the Review and Submit tab if no changes are needed. Otherwise, modify any of the below highlighted fields, add attachments, or do anything that is needed.



Bhared Favorites Main Menu > eProcurement > Manage Re	equisitions	
Create Requisition	2. Add Items and Services 3. Review and Submit	
Review the details of your requisition, make any necessary Business Unit: UWSYS UW Systems Requester: 00056855 Requisition Name:	y changes, and submit it for approval. vide *Currency: USD MCDONALD, DENISE Priority: Medium V	
Requisition Lines         Image: Constraint of the second sec	or Name Quantity UOM Price Total	
Consolidate with other Reqs           Shipping Line:         1         Due Date:           Status:         Active         *Ship To:         V/Z           Attention To:         MCDONALD, DENISE         *Distribute By:         Qty         Specific	Woverride Suggested Vendor         Image: Constraint of the second seco	
Accounting Lines           Qhartfields1         Chartfields2         Details         Details 2           Account         Fund         Dept	Personalize   Eind   View AI   IP   IP First II 1 of 1 IP Last           Asset Information         Asset Information 2         Budget Information         ITTP           Program         Class         PC Bus Unit         Project         Activ	
3730 Q 106 Q 404000 Q	I         Q         Q         Q           Total Amount:         100,000.00         USD	
Add to Favorites Add to Comments ?	Template(s) Modify Line / Shipping / Accounting Delete	(J)
Image: Seve & submit     Image: Seve & submit	Shown at Voucher Approval Justification	

- 8. Click Save & Submit.
- 9. Once the requisition is successfully submitted, the required approvals prior to Purchase Order creation will be displayed. Your are done.

Department Approval		
✓ Line 1:Pending DRAWER DIVIDERS		
Department Approval		
Pending <u>Employee, EXMRG74</u> UW ePro Level 1 approver		
Controller		
Line 1:Awaiting Further Approv DRAWER DIVIDERS	als	
Controller		
Not Routed Employee, EXMRG60 UW ePro Level 2 approver		
Buyer		
Line 1:Awaiting Further Approv DRAWER DIVIDERS	als	
Buyer		
Not Routed           Auditor, EXAUD60           UW ePro Level 3 approver		
Submit Edit Requisition	Apply Approval Changes	Check Budget



You may need to cancel a requisition you created. If you need to cancel the requisition go to the below Navigation.

#### Main Menu > eProcurement > Manage Requisitions

You will get the below screen. Request Status should be blank. If it is not, use the drop down to select the blank space.

Enter in as many filters as you desire. The more fields populated the quicker your search.

My recommendation is to have at least the Business Unit populated before you search. It would also be ideal to have the Requisition ID number you want to cancel.





Sample Search. Used Business Unit, Dates, and requestor (Employee ID).

KONSIN SP	Shared Financial System	Expenses user - E	EXMRG74							
avorit	tes Main Me	nu > eProcurement >	Manage Requisi	tions						
Maı	nage Req	quisitions				Example	e of a type of f	ilter before	hitti	ing sear
▼ Se	arch Requisit	tions								
Tol	ocate requisitio	ons, edit the criteria below a	ind click the Sea	rch button.						
Bus	iness Unit:	UWSYS	Requisition	n Name:						Q
Req	uisition ID:		Request St	atus:		~	Budget Status:			~
Date	e From:	10/03/2017	Date To:		10/10/2017	31				
Req	uester:	EXMRG74	C Entered By	r:		Q	PO ID:			Q
Req	Search	Clear	tion aliak the Ev	nond triangle	itor	,	,			
To ec	dit or perform a	another action on a requisition	on, make a selec	tion from the	Action dropdown li	st and click Go.				
	Req ID	Requisition Name	BU	Date	<u>Status</u>	Budget	Total			
P	0000000075	test template	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD <se< td=""><td>lect Action&gt;</td><td>~</td><td>Go</td></se<>	lect Action>	~	Go
Þ	0000000074	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD <se< td=""><td>lect Action&gt;</td><td>~</td><td>Go</td></se<>	lect Action>	~	Go
Þ	0000000073	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD <se< td=""><td>lect Action&gt;</td><td>~</td><td>Go</td></se<>	lect Action>	~	Go
Þ	0000000072	TEST IT CONSULTING SERV	UWSYS	10/06/2017	Pending	Not Chk'd	2,500,000.00 USD <se< td=""><td>lect Action&gt;</td><td>~</td><td>Go</td></se<>	lect Action>	~	Go
Creat	te New Requis	ition <u>Review</u>	Change Reques	t	Review Change	Tracking	Manage Receipts	Requisition Report		

Find the requisition you want to cancel. Go to the menu to the right and use the drop down to find "Cancel."

Shared Financial System	Expenses use	r - EXMRG74						
Favorites Main Me	nu > eProcurement	> Manage Requisi	tions					
Manage Rec	uisitions							
🗢 Search Requisit	ions							
To locate requisition	ons, edit the criteria be	low and click the Sea	rch button.					
Business Unit:	UWSYS	Requisitio	n Name:					Q
Requisition ID:		Request S	tatus:		~	Budget Status:		~
Date From:	10/03/2017	Date To:		10/10/2017	Ħ			
Requester:	EXMRG74	C Entered B	<i>/</i> :		Q	PO ID:		Q
Search	Clear							
Requisitions 👔								
To view the lifespar To edit or perform a	and line items for a re nother action on a req	equisition, click the Ex juisition, make a selec	pand triangle tion from the /	icon: Action dropdown	list and click Go.	⊳		
Reg ID	Requisition Name	BU	Date	Status	Budget	Total		
▶ <u>000000075</u>	test template	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD 🖸	ancel Requisition	Go
▶ <u>000000074</u>	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	Select Action>	Go
▶ <u>000000073</u>	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	Select Action>	Go
▶ <u>000000072</u>	TEST IT CONSULTI SERV	NG UWSYS	10/06/2017	Pending	Not Chk'd	2,500,000.00 USD	Select Action>	] Go
Create New Requis	ition <u>Re</u>	view Change Reques	t	Review Chang	e Tracking	Manage Receipts	Requisition Report	

Once it is selected, click Go.



## Requisition Details for:

## Employee, EXMRG74

Business Unit: Requisition Name:		UWSYS	: 10/09/		)17			
		test template	Stat	us:	s: Pending			
Requisition ID:		000000075		Total: 20,		,000.00 USD		
Line D	etails							
Line	Item Description	Status	Price			Qty	Total	
	1 consulting services	Pending Approval	10,000.00000	EACH		2.0000		20000.00
Return	to Manage Requisitions			Cancel Re	quisition			

#### You will be brought to this screen. Click Cancel Requisition

File Edit V	w Favorites Tools Help	
× 🔁 Conver	▼	
👍 🧧 Dashbo	rd « Shared Finan 🗿 Siteimprove ID 🧧 Charter 🔤 Annual Benefits Enrollme 🧃 intermediate-ps-query 🗿 basic-ps-query 🗿 Encumbrance_Journal_On 🧿 PeopleSoft Purchasing 9.1 🥃 PeopleBooks	м
Shared	Expenses user - EXMRG74	
Favorites Main	lenu > eProcurement > Manage Regulsitions	

#### Manage Requisitions

- 5	Search Requisit	ions								
Т	locate requisition	ons, edit the criteria below an	nd click the Sea	rch button.						
Bu	siness Unit:	UWSYS ×	Requisitio	n Name:						0
Re	quisition ID:		Request S	tatus:		$\sim$	Budget Status:			~
Da	te From:	10/03/2017	Date To:		10/10/201	7				
Re	quester:	EXMRG74	C Entered B	y:		Q	PO ID:			Q
	Search	Clear								
Re	quisitions 😰									
To To	view the lifespan edit or perform a	and line items for a requisiti nother action on a requisition	on, click the E>	pand triangle tion from the	icon: Action dropdov	In list and click Go.				
	Reg ID	Requisition Name	<u>BU</u>	Date	<u>Status</u>	Budget	Total			
₽	000000075	test template	UWSYS	10/09/2017	Canceled	Valid	0.00 USD	<select action=""></select>	~	Go
₽	000000074	test	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<select action=""></select>	~	Go
₽	000000073	consultants	UWSYS	10/09/2017	Pending	Not Chk'd	20,000.00 USD	<select action=""></select>	~	Go
₽	000000072	TEST IT CONSULTING SERV	UWSYS	10/06/2017	Approved	Valid	2,500,000.00 USD	<select action=""></select>	~	Go
Cre	ate New Requis	ition Review C	hange Reques	st	Review Cha	nge Tracking	Manage Receipts	Requisition Report		

You will be brought back to the Manage Requisition Page. The requisition now has a status of Canceled. You are done.



May 1<sup>st</sup> through June 30<sup>th</sup>, requisitions for the New Fiscal can be entered into the System. These requisitions must be flagged as NEW YEAR requisitions. The below steps give instructions on identifying the requisitions as a NEW YEAR. The screen shots assume FY18 is the NEW YEAR.

- Follow the path below to create a requisition.
   Main Menu > eProcurement > Create Requisition
- 2. Add FY18 to the beginning of the Requisition Name Field.

Shared Financial System									
Favorites Main Menu > ePro	ocurement > Create Requisition								
¿Create Requisition									
1. Define Requisition	n 2. Add Items and Services		3. Review and	Submit					
Specify requisition name, reque	Specify requisition name, requester, and other information that applies to the entire requisition.								
Business Unit:	UWSYS UW Systemwide								
Requester:	00856855	Ξ.	*Currency:	USD					
Requisition Name:	FY18 - Computer Purchase ×		Priority:	Medium	$\checkmark$				
Line Defaults									
Continue									
		Add FY18 to	beginning of	of					
		Requisition	Name, Click	Add					
		Itoms and S	nuicos tab						
		Trents and Se	ervices lab						

- 3. Add item(s) as normal.
- 4. After clicking Add Item, click the Review and Submit tab.

Eavorites Main Menu )	A Procurement ) Create Requisition			Home   Worklist	
Favorites     Main Menu     e       Create Requisition       Image: the second secon	Procurement > Create Requisition Th	erms and Services	3. Review and Submit	? Help	
Special Item "Item Description: "Price: "Quantity: "Category: Vendor ID: Vendor ID: Vendor Name: Vendor Item ID: Mfg ID:	Impartes         Imm         Im	*Currency: *Unit of Measure: Due Date: <u>Suggest New Vendor</u>	USD EA Q II		
Manufacturer: Mfg Item ID: Additional Information	Show at Receipt	Show at Voucher	Request New Item		

5. Click the carrot to Expand

VISCONSI	SITY OF N SYSTEM							
	Shared Financial System	A						Home
	Favorites Main Menu > e	eProcurement > Create Requ	isition					2
	Create Requisitio	on 🥒						Ŷ
	Add Items     Review the details of your Aquisition, make any necessary changes, and			ervices	3. Review and Sut	omit		
				it for approval.	*			
	Business Unit: Requester: Requisition: ame:	UWSYS 00856855 FY18 - Computer Purchase	de MC	DONALD, DENISE	*Currency: Priority:	USD Medium V		
1	Requisit o Lines 😰							
	e <u>Description</u>	<u>Vendo</u>	Name	Quantity UOM	Price	Total		
	1 computer scr	reen DELL C	OMPUTERS	1.0000 EACH	100.00000	100.00		
	Select All / Deselect A	All			Total Amount:	100.00 USD		
	📙 🔒 Add to Favo	orites 🔍 Add to 1	Template(s)	Modify Line / Shippi	ng / Accounting	Delete		
	Comments 👔	Show at Receipt	Shown at	Voucher	Approval Justification		7	
	Check Budget	🐯 Pre-Check i	Budget w approvals	× Cancel requisition	Find more items			

6. Update as Normal, but Insert "FY18" in comments section. If you have other comments, just insert after FY18.

Shared Shared Franciski SFQA		46
Create Requisition  Create Requisition  C. Add Items and Services  C. Add	? Help	ĺ
Business Unit: UWSYS UW Systematide *Currency: USD Requester: 00555555 MCDONALD, DENISE Priority: Ledium ✓ Requisition Name: PYIS - Computer Purchase		
Liter prescription Vendor Nexue Quantity USW Etite Total		
Samping Line     1     User Jass     1     User Jass     1     100.00000     1       Status:     Attention To:     McODONALD, DENISE     1     100.00000     1		
Accounting Lines     Percentage     Parameter     Parameter     Parameter     Parameter     Control       Counteres     Counter		
Select All / Decelect All     Total Amount: 100.00 USD      Add to Pavorites     Add to Tempistant: 2 Modify Line / Shipping / Accounting     Delete		
If Y16     Computer purchase per contract       If Send to Vendor     □ Show at Receipt       If Send to Vendor     □ Show at Receipt       If Check Budget     If Pre-Check Budget		
😼 Save & submt 🐻 Save & preview approvals 🗙 Cancel requisition Find more items		

7. Save and Submit as normal. Approvers and Buyers will now know the requisition is for a New Year PO.