PeopleSoft Implementation Project

Business Process Documentation
eProcurement Requester

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

PeopleSoft Version: 9.1 Financials/Supply Chain

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Revision Control

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.
https://www.wisconsin.edu/sfs/security/

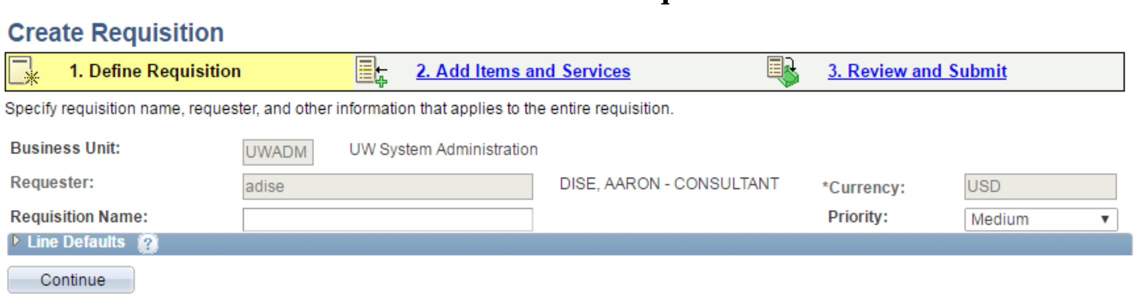
Create a Requisition

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.

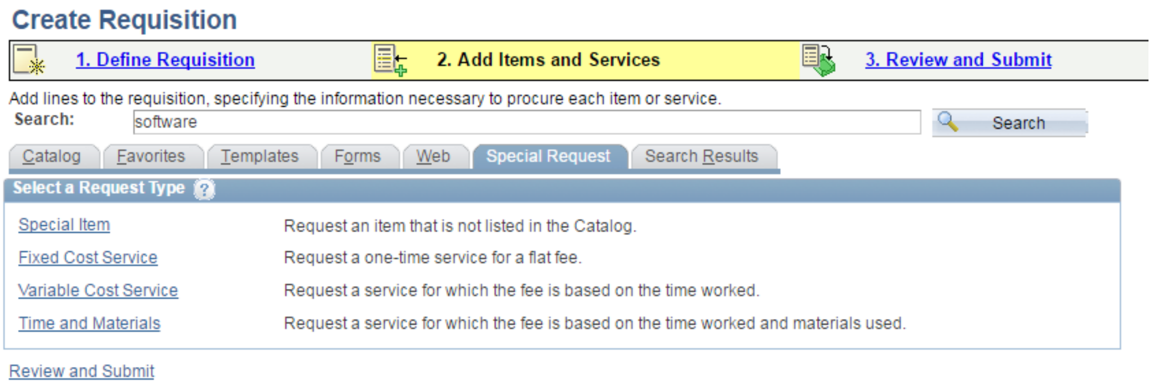
IF YOU WOULD LIKE TO CREATE A REQUISITION USING THE COPY FUNCTION, GO TO COPY REQUISITION SECTION OF THESE PROCEDURES, OTHERWISE PLEASE PROCEED WITH STEP 1.

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

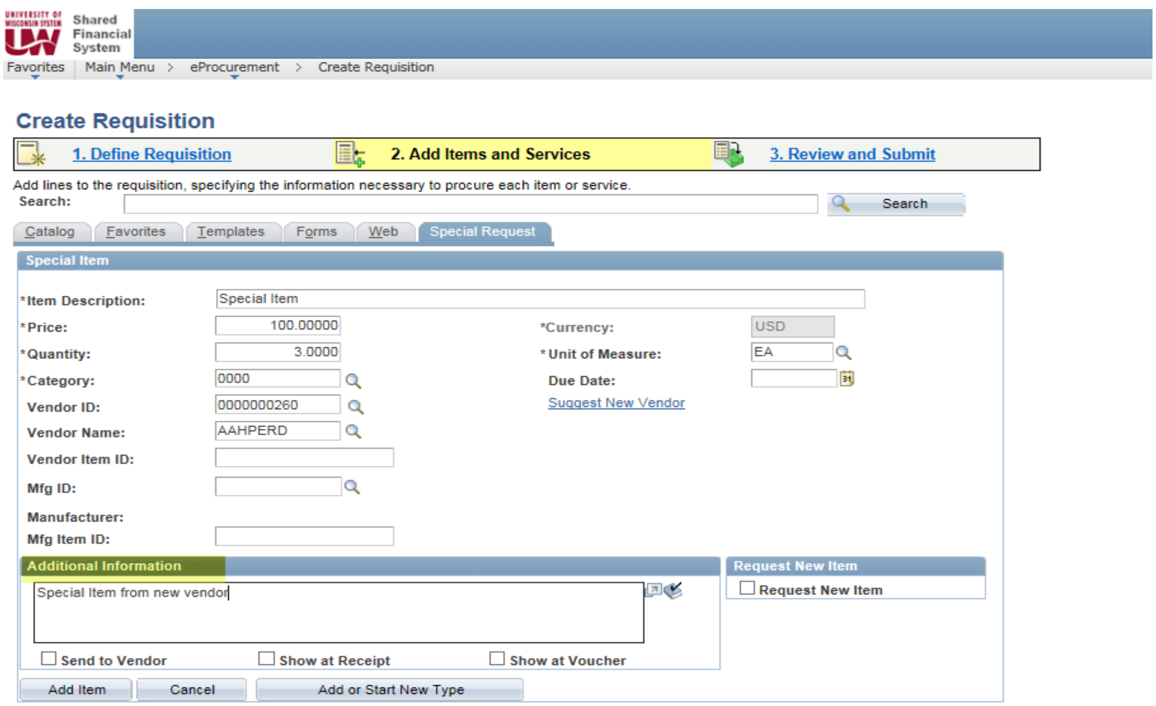
   Main Menu > eProcurement > Create Requisition



2. Click **2. Add Items and Services** to select items. Select Special Request.



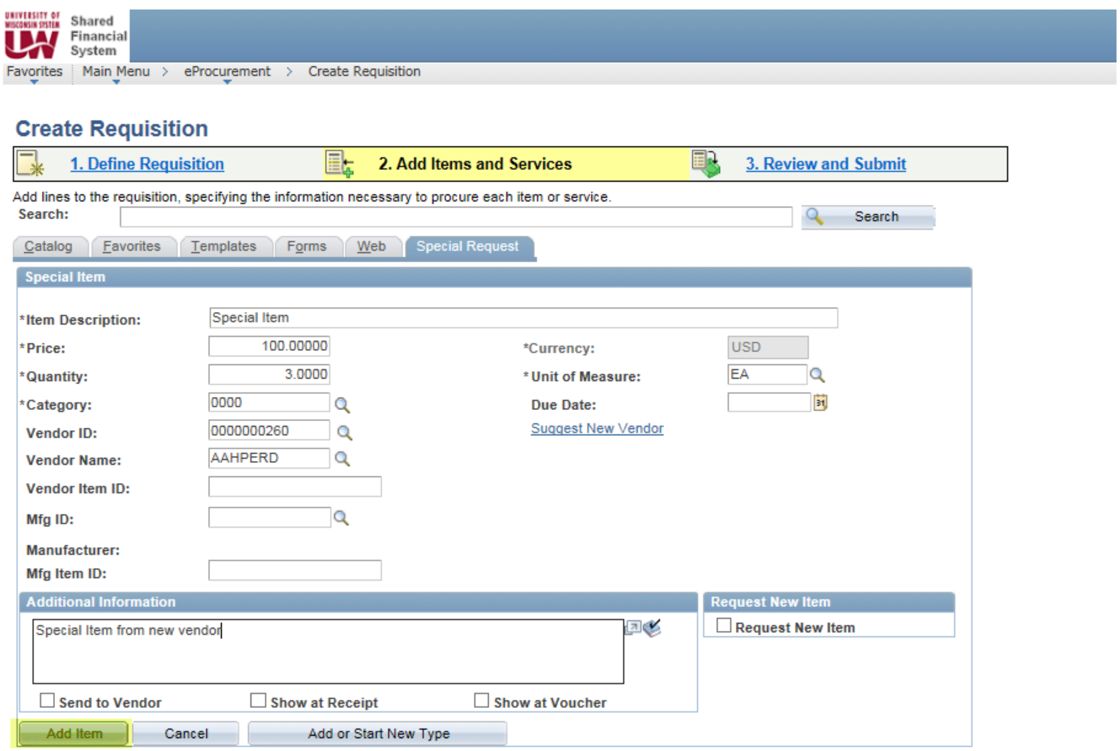
3. Click the Special Item link.



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.



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.

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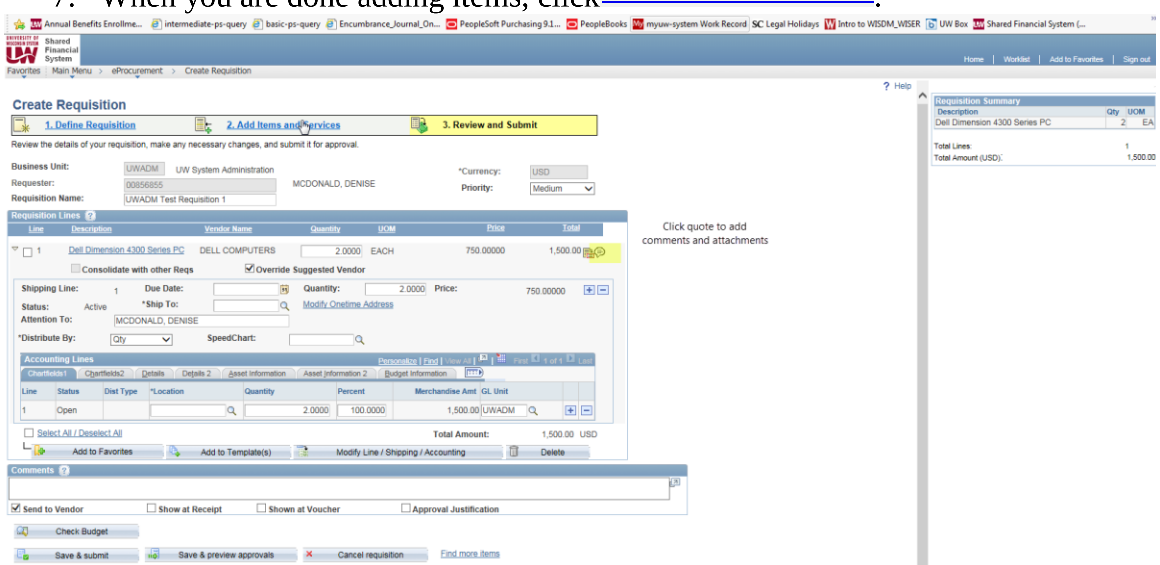
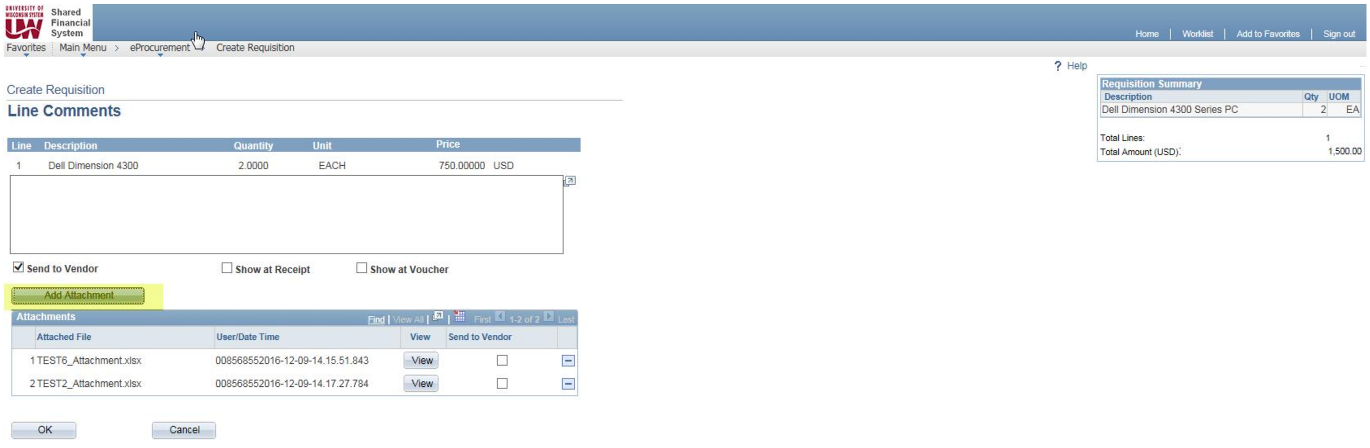
Requisition Summary		
Description	Qty	UOM
Special Item	3	EA
Total Lines:	1	
Total Amount (USD):	300.00	

To add additional items, click Add Item again.

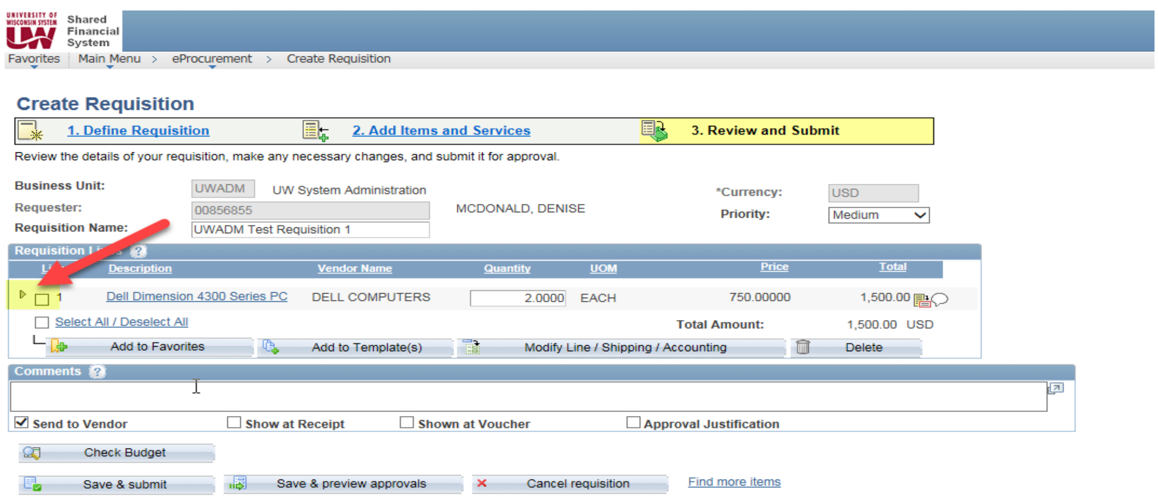
7. When you are done adding items, click 3. Review and Submit.



8. Click 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.

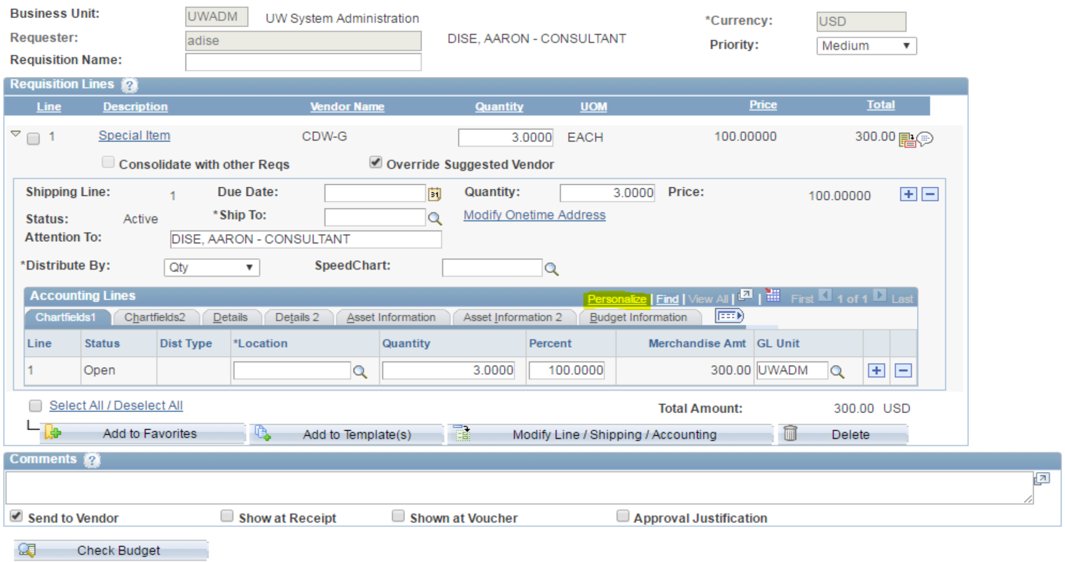


9. Select ▷ to add the appropriate Ship To, Location, and chartfield combo information.

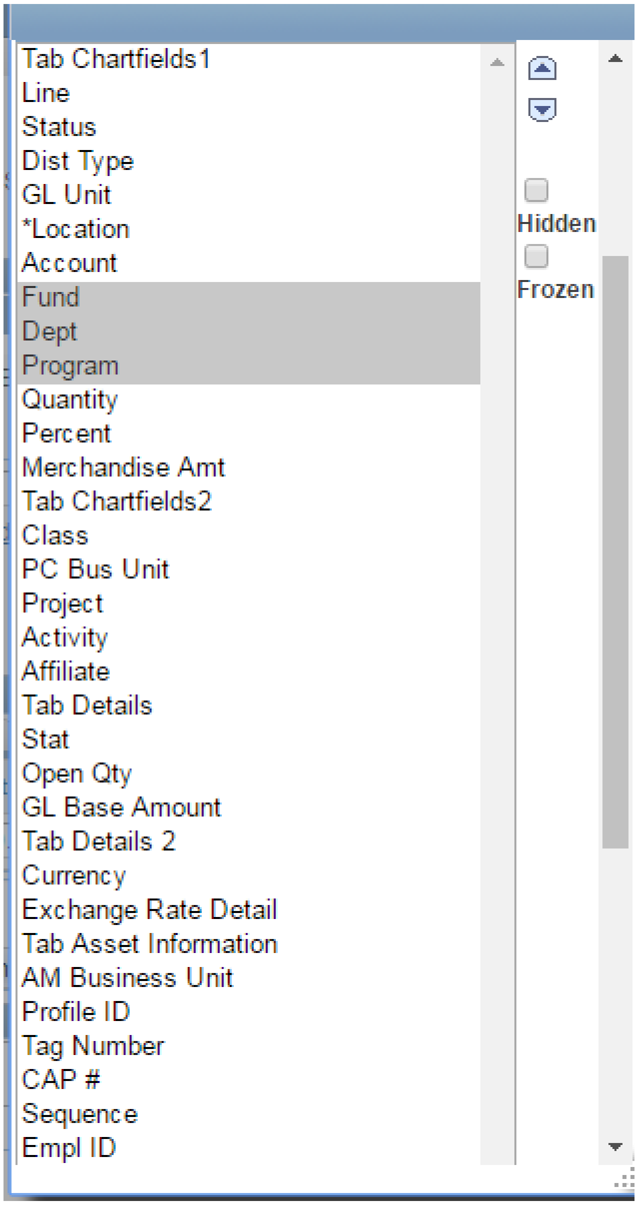


10. If this is your first time entering a requisition, go to step 11. If this is not your first time and you have already personalized your view, go to step 13. THIS STEP IS OPTIONAL.

11. Click the carrot to expand and display the below.

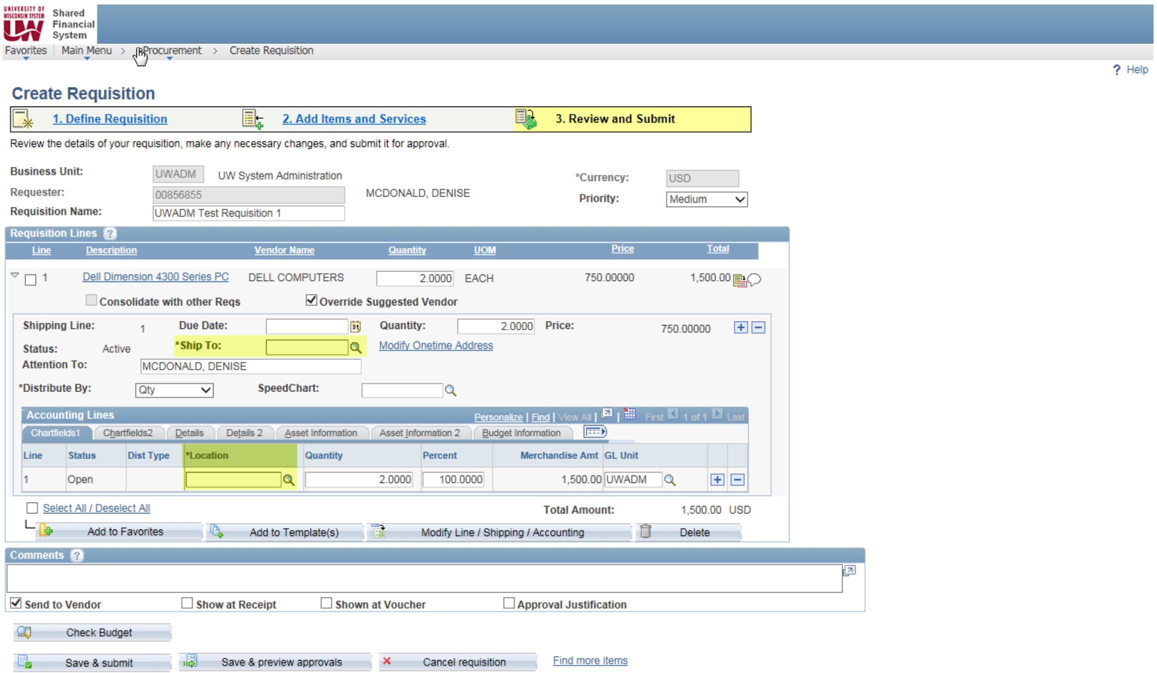

Business Unit:
UWADM
UW System Administration
Requester:
adise
DISE, AARON - CONSULTANT
Requisition Name:
*Currency:
USD
Priority:
Medium
Requisition Lines
Line
Description
Vendor Name
Quantity
UOM
Price
Total
1
Special Item
CDW-G
3.0000
EACH
100.00000
300.00
Consolidate with other Reqs
Override Suggested Vendor
Shipping Line:
1
Due Date:
Quantity:
3.0000
Price:
100.00000
Status:
Active
*Ship To:
Modify Onetime Address
Attention To:
DISE, AARON - CONSULTANT
*Distribute By:
Qty
SpeedChart:
Accounting Lines
Personalize | Find | View All
First 1 of 1 Last
Chartfields1
Chartfields2
Details
Details 2
Asset Information
Asset Information 2
Budget Information
Line
Status
Dist Type
*Location
Quantity
Percent
Merchandise Amt
GL Unit
1
Open
3.0000
100.0000
300.00
UWADM
Select All / Deselect All
Total Amount:
300.00 USD
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

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

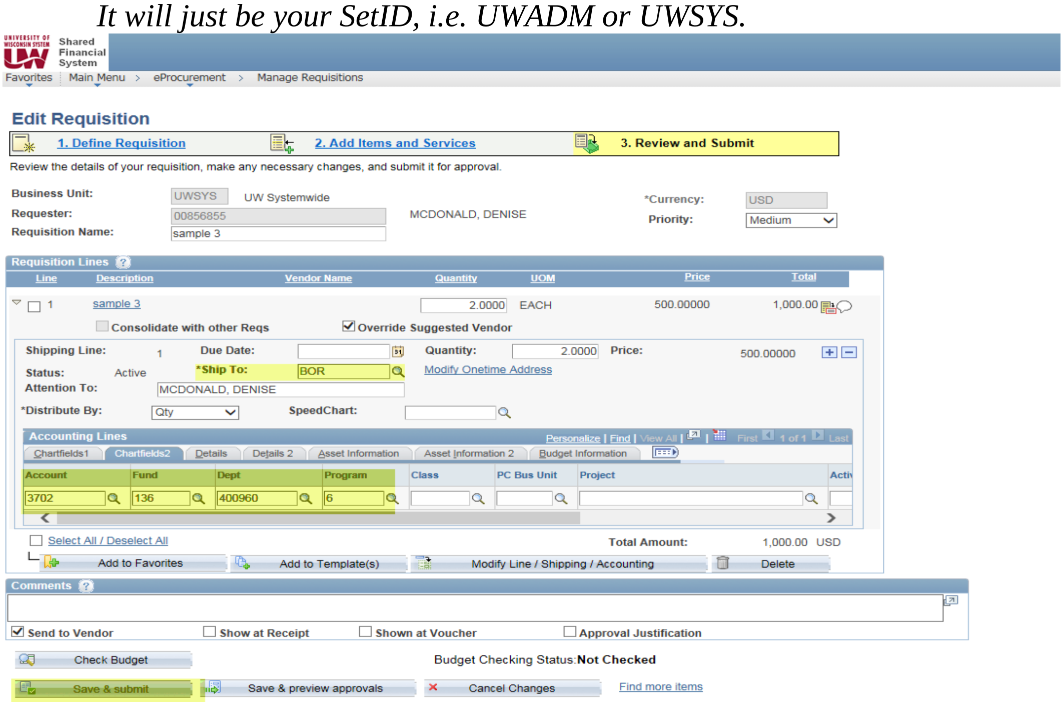


13. Enter the following chartfields. The magnifying glass allows you to select from a list of available variables.

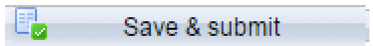
- Ship To
- Location
- Account
- Fund
- Dept
- Program



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.*



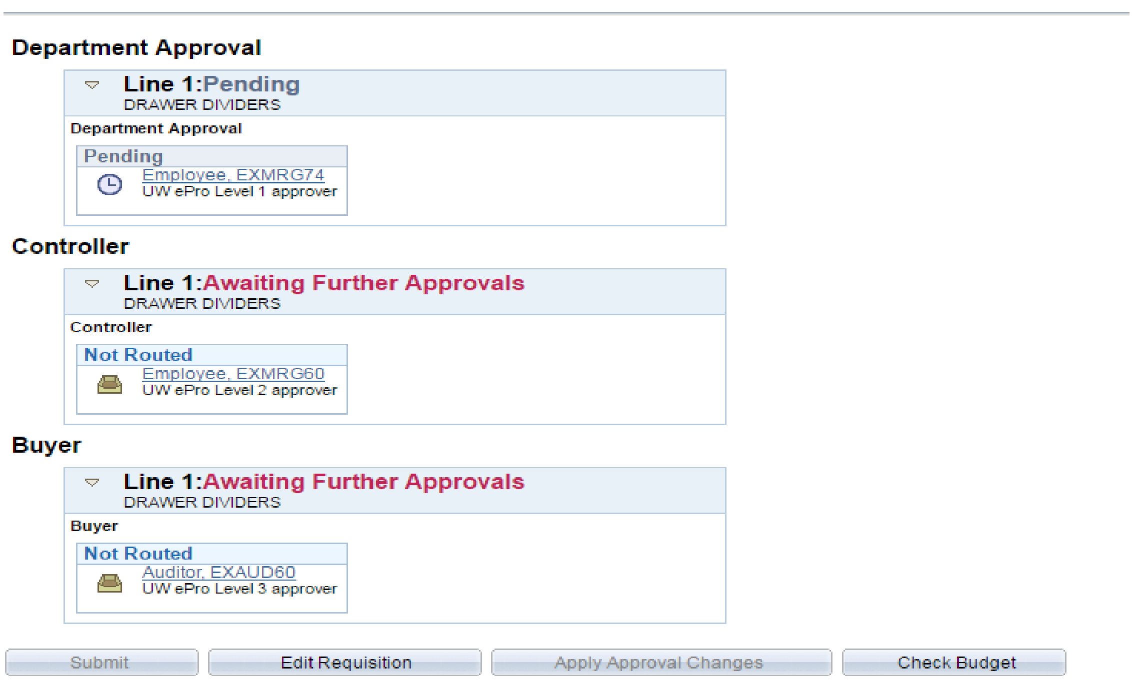
15. Look over the requisition one more time. If you are OK with all the inputs, you are ready to submit.

16. Click 

. 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.



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.

Steps for the System

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).

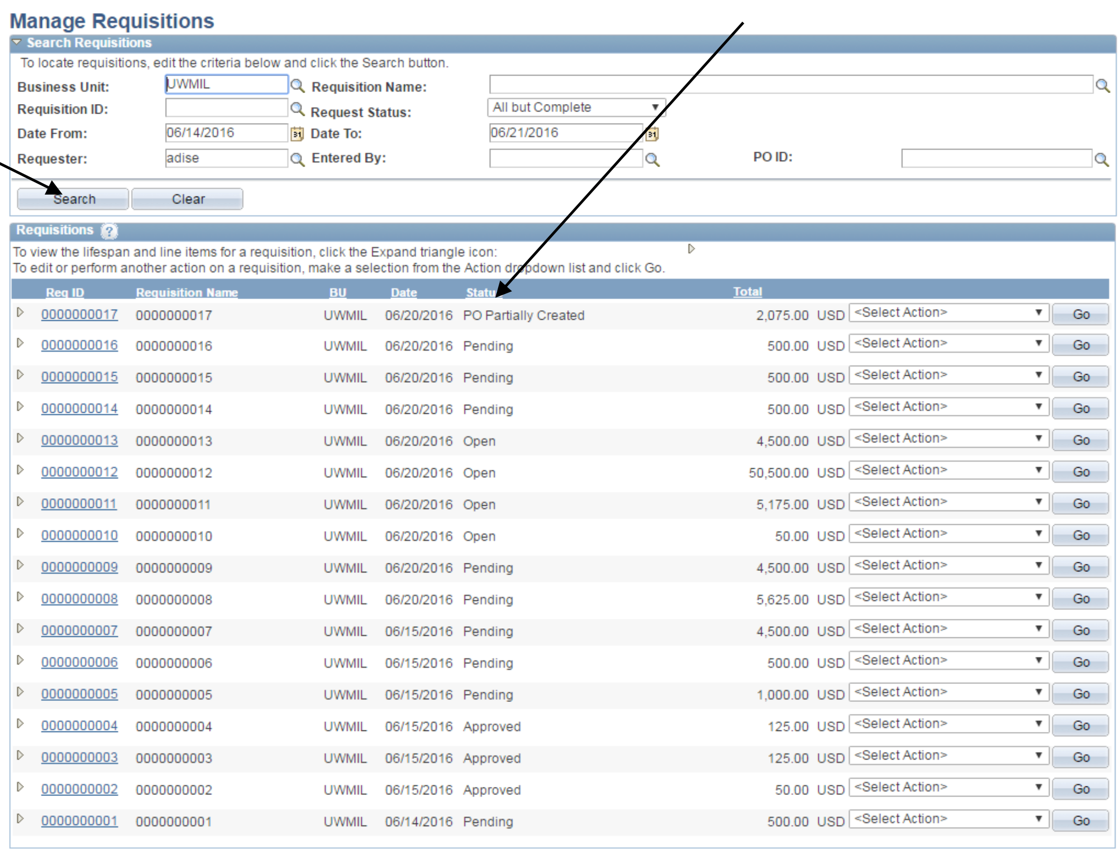
Main Menu > eProcurement > Manage Requisitions

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)	PO ID

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



Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UWMIL Requisition Name:
Requisition ID: Request Status: All but Complete
Date From: 06/14/2016 Date To: 06/21/2016
Requester: adise Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

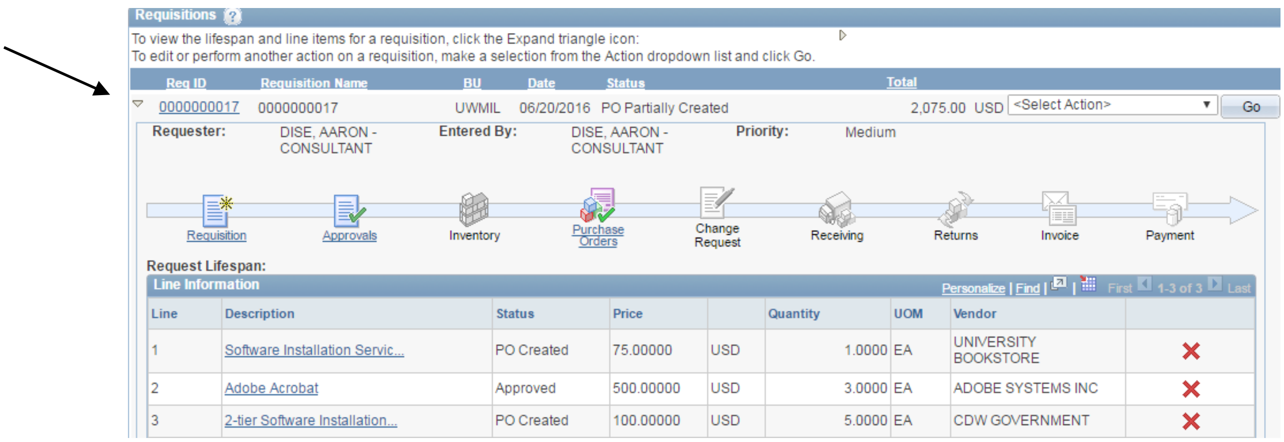
Req ID	Requisition Name	BU	Date	Status	Total			
0000000017	0000000017	UWMIL	06/20/2016	PO Partially Created	2,075.00	USD	<Select Action>	Go
0000000016	0000000016	UWMIL	06/20/2016	Pending	500.00	USD	<Select Action>	Go
0000000015	0000000015	UWMIL	06/20/2016	Pending	500.00	USD	<Select Action>	Go
0000000014	0000000014	UWMIL	06/20/2016	Pending	500.00	USD	<Select Action>	Go
0000000013	0000000013	UWMIL	06/20/2016	Open	4,500.00	USD	<Select Action>	Go
0000000012	0000000012	UWMIL	06/20/2016	Open	50,500.00	USD	<Select Action>	Go
0000000011	0000000011	UWMIL	06/20/2016	Open	5,175.00	USD	<Select Action>	Go
0000000010	0000000010	UWMIL	06/20/2016	Open	50.00	USD	<Select Action>	Go
0000000009	0000000009	UWMIL	06/20/2016	Pending	4,500.00	USD	<Select Action>	Go
0000000008	0000000008	UWMIL	06/20/2016	Pending	5,625.00	USD	<Select Action>	Go
0000000007	0000000007	UWMIL	06/15/2016	Pending	4,500.00	USD	<Select Action>	Go
0000000006	0000000006	UWMIL	06/15/2016	Pending	500.00	USD	<Select Action>	Go
0000000005	0000000005	UWMIL	06/15/2016	Pending	1,000.00	USD	<Select Action>	Go
0000000004	0000000004	UWMIL	06/15/2016	Approved	125.00	USD	<Select Action>	Go
0000000003	0000000003	UWMIL	06/15/2016	Approved	125.00	USD	<Select Action>	Go
0000000002	0000000002	UWMIL	06/15/2016	Approved	50.00	USD	<Select Action>	Go
0000000001	0000000001	UWMIL	06/14/2016	Pending	500.00	USD	<Select Action>	Go

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 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.

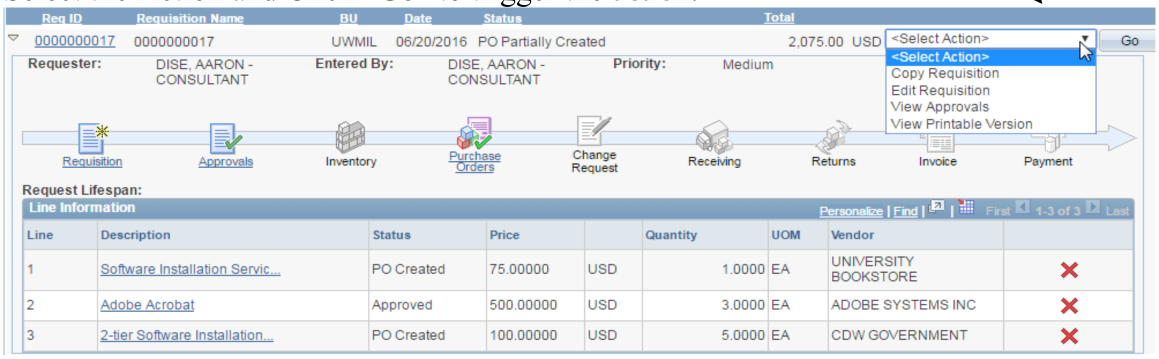


Once the requisition moves through entire “Lifespan” the link(s) all icons will be available for review.

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.



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

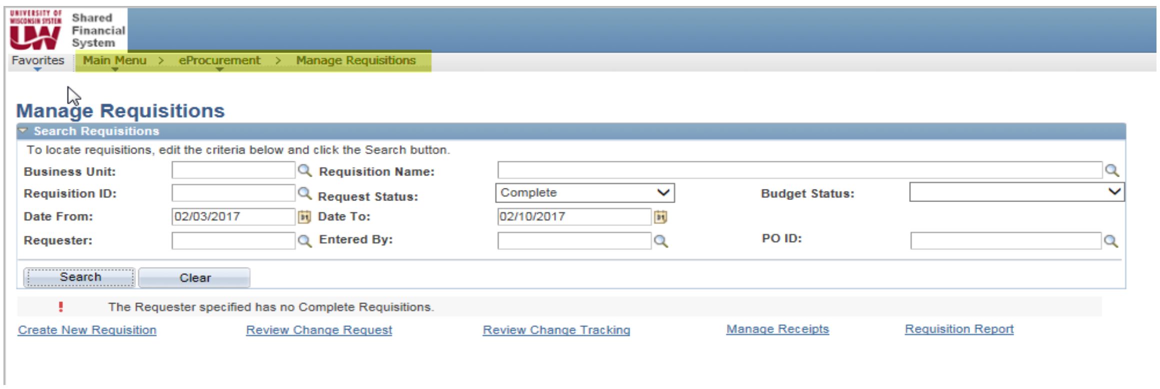
System Steps

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

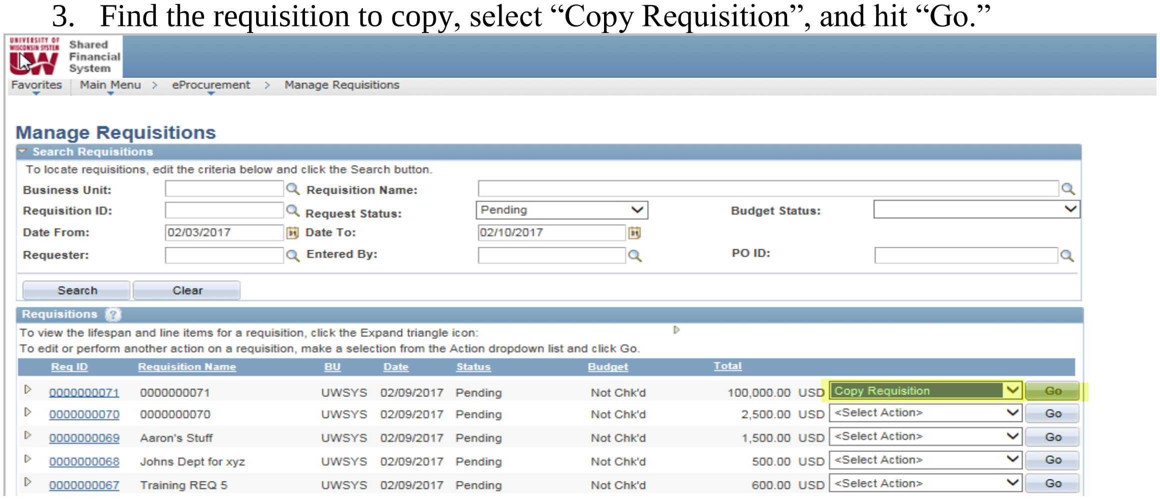
   Main Menu > eProcurement > Manage Requisitions



2. 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."



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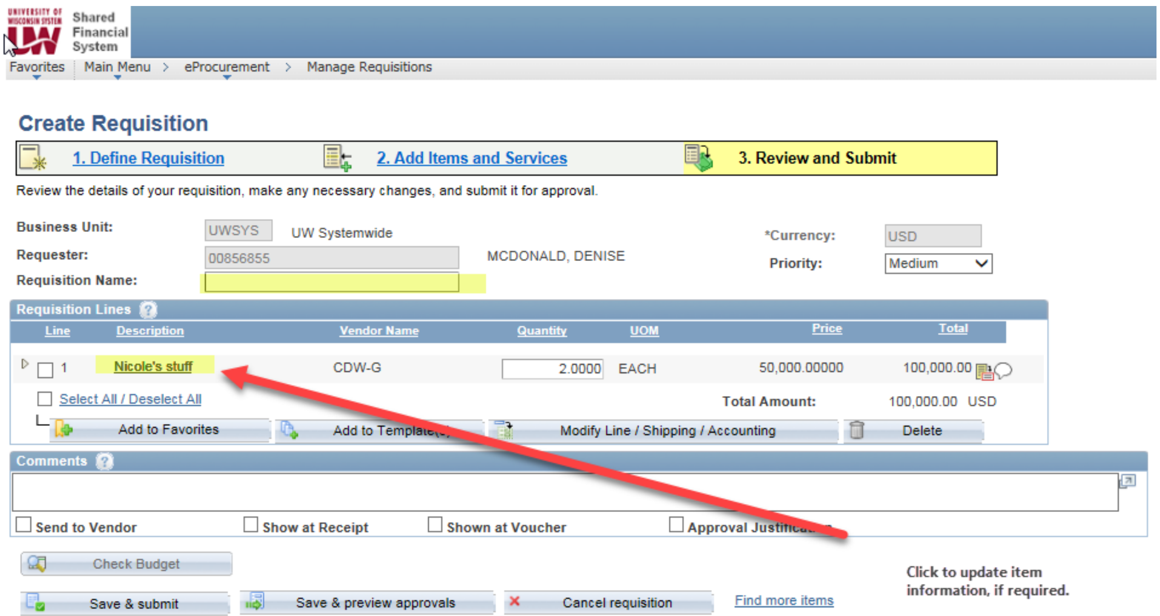
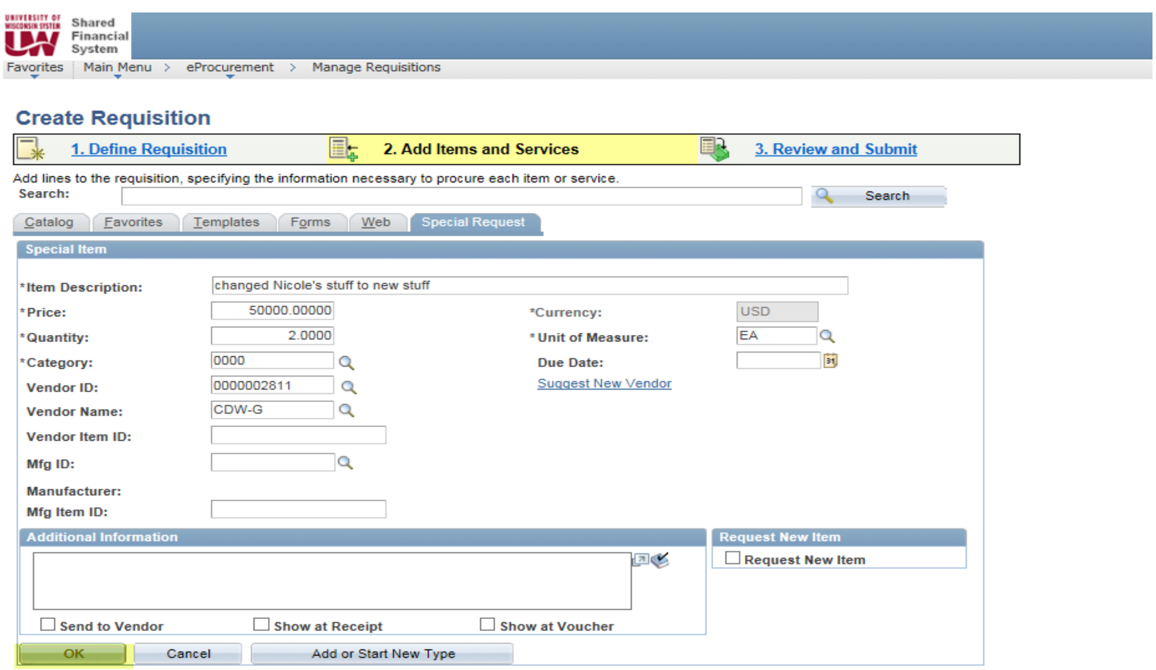
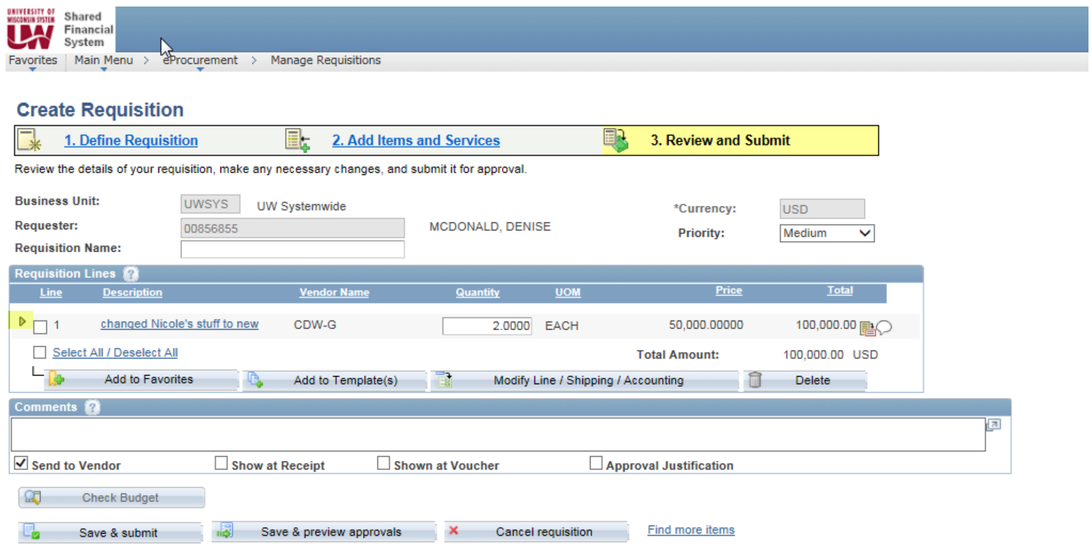
4. The below screen will appear. You can go directly to the Review and Submit tab if no changes are needed. Otherwise, update the Requisition Name and/or the item information. To update the item information, click the link with the item.



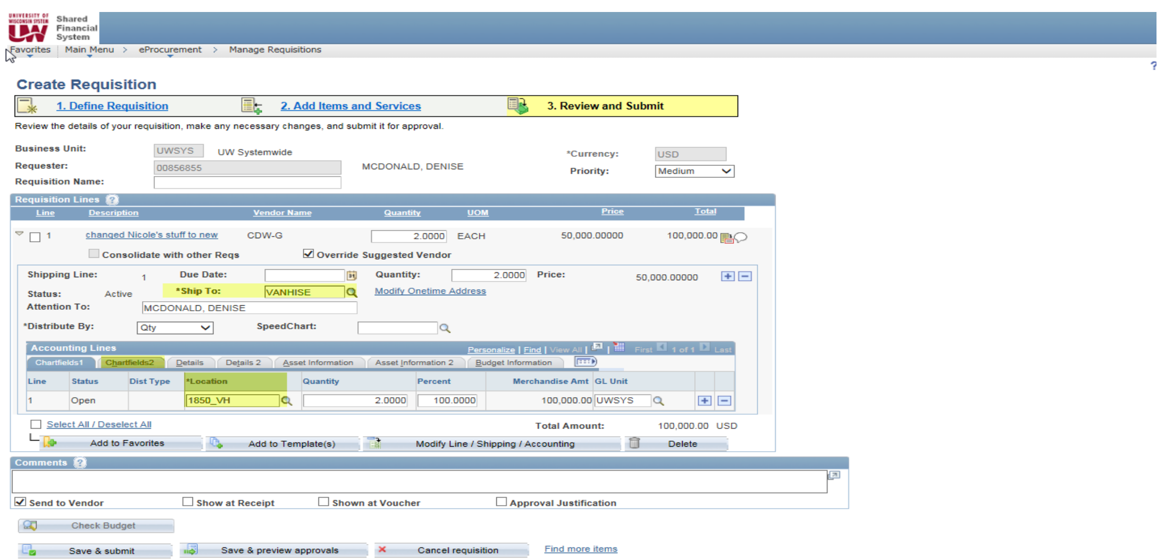
5. The item screen will appear. You can update anything on this page. Once you make all the updates, hit OK.

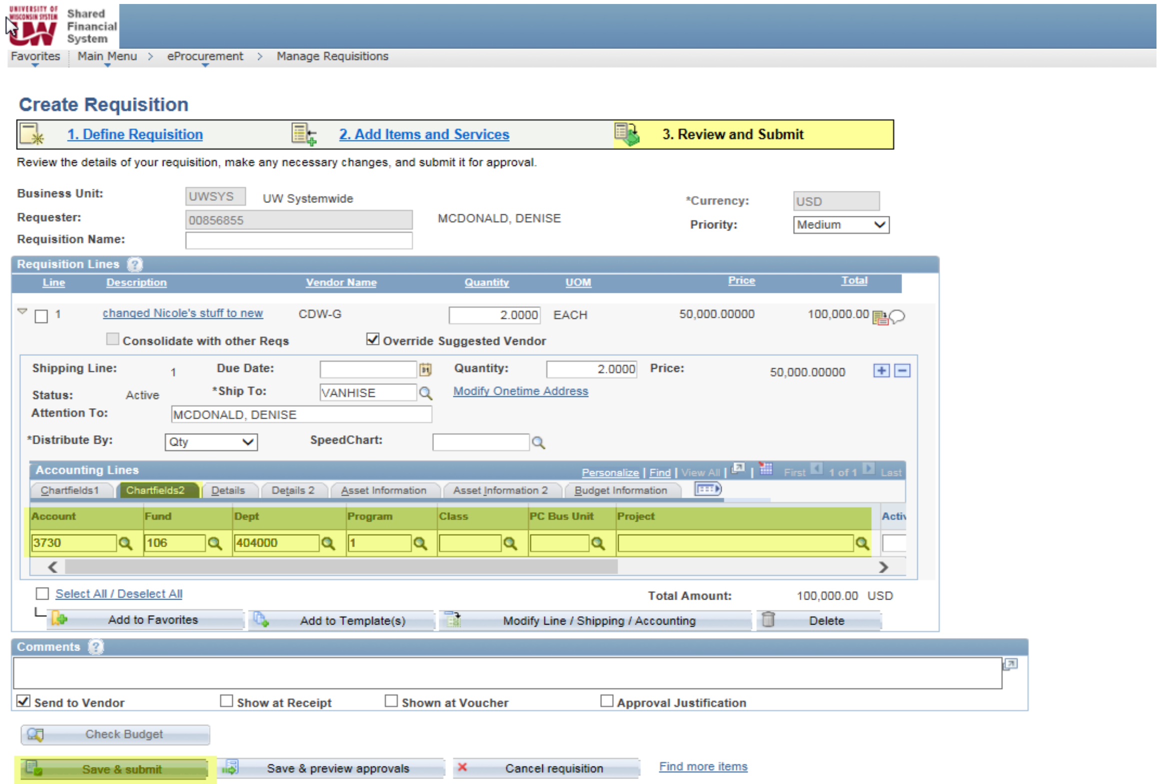


6. Select the carrot to expand the requisition.



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.





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.

Cancel a Requisition

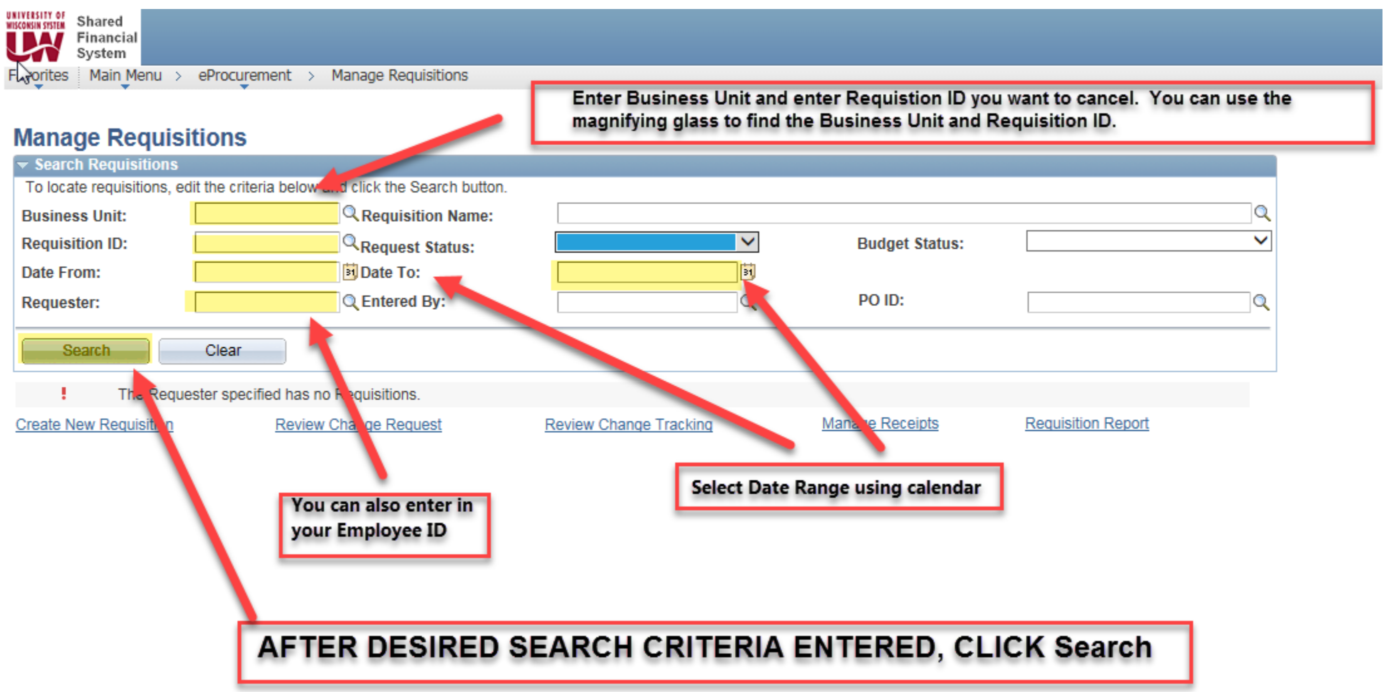
You may need to cancel a requisition you created. If you need to cancel the requisition go to the below Navigation.

Main Menu > eProcurement > Manage Requisitions

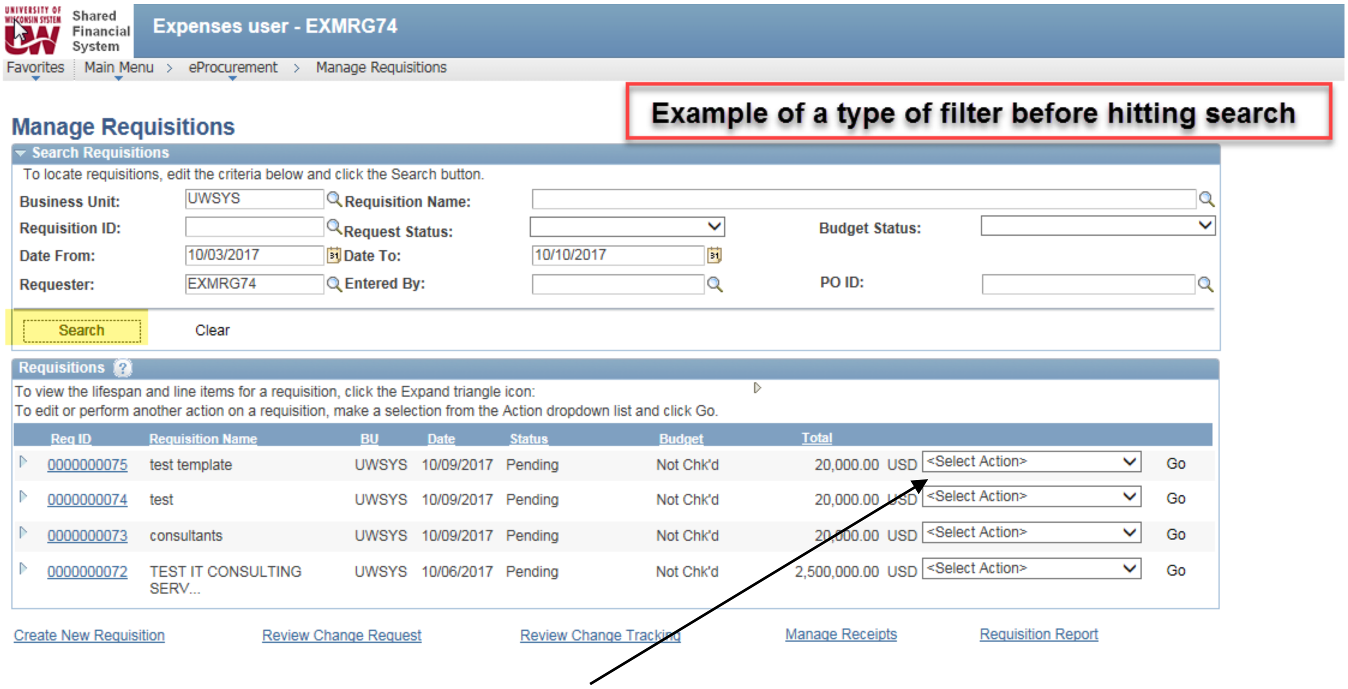
You will get the below screen. Request Status should be blank. If it is not, use the drop down to select the blank space.

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

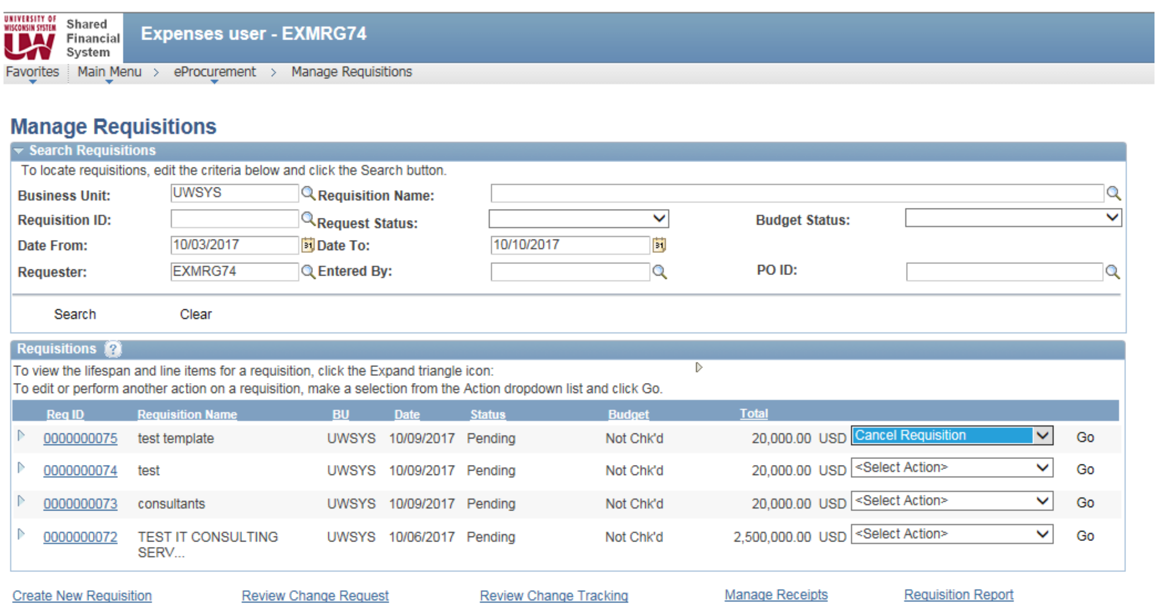
My recommendation is to have at least the Business Unit populated before you search. It would also be ideal to have the Requisition ID number you want to cancel.



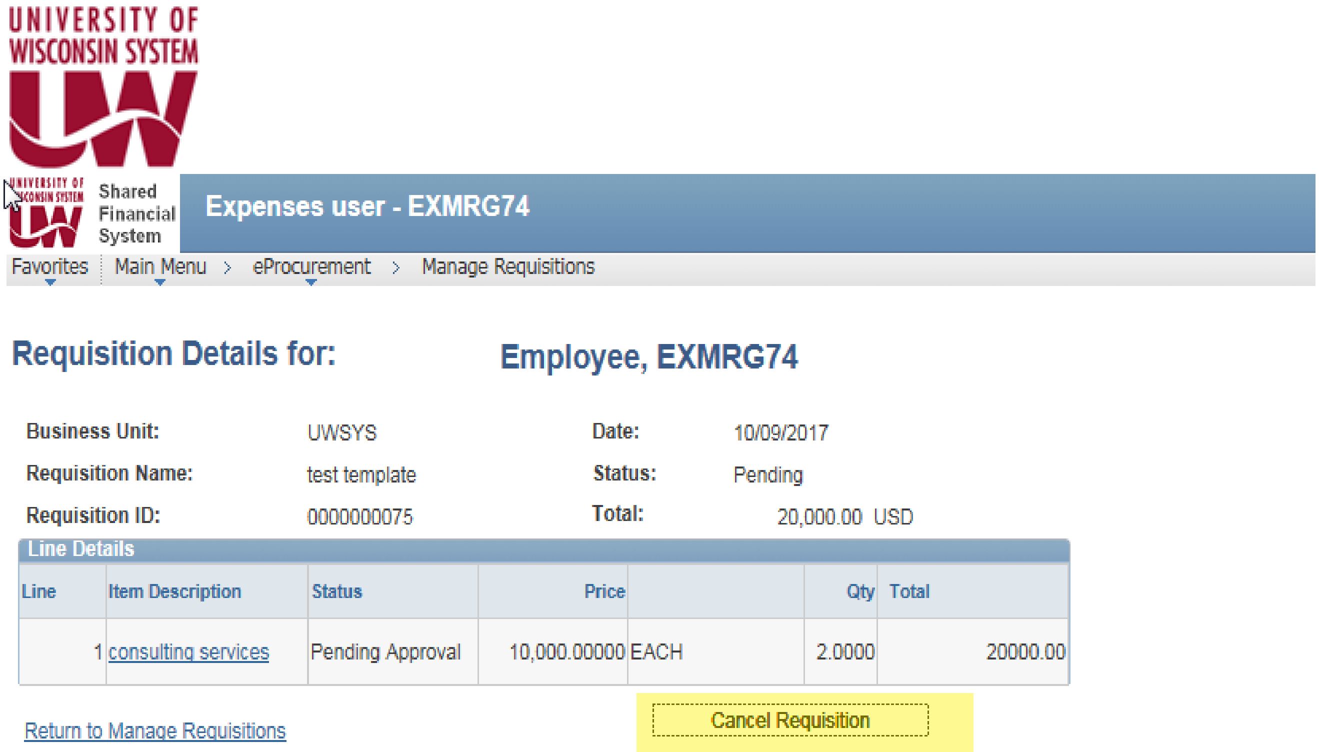
Sample Search. Used Business Unit, Dates, and requestor (Employee ID).



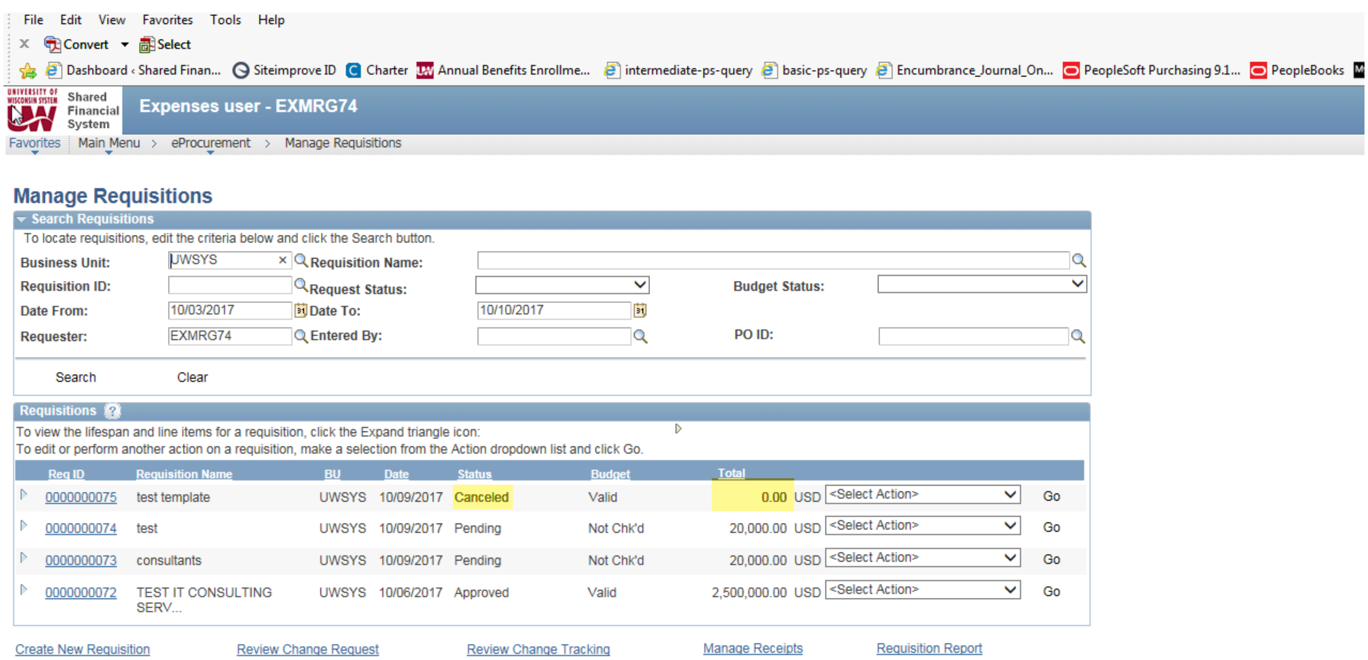
Find the requisition you want to cancel. Go to the menu to the right and use the drop down to find “Cancel.”



Once it is selected, click Go.



You will be brought to this screen. Click Cancel Requisition



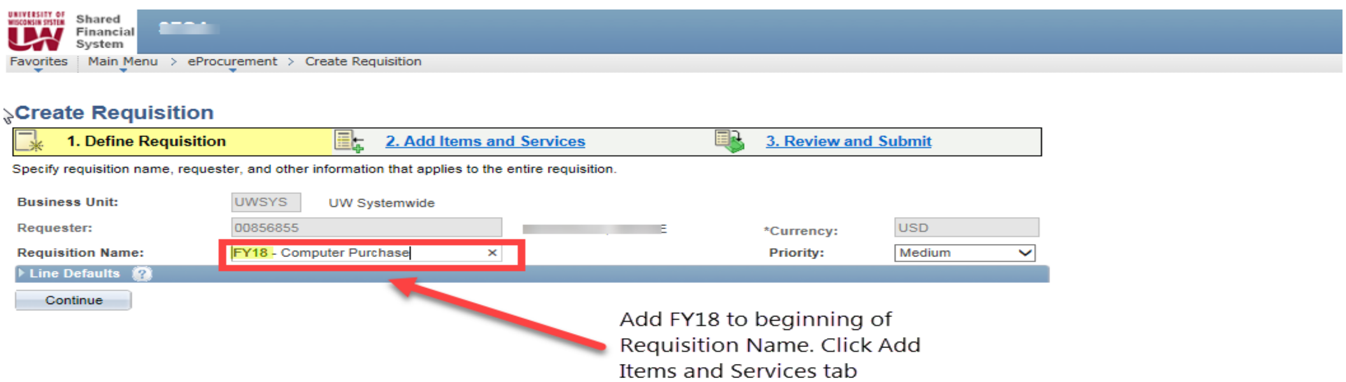
You will be brought back to the Manage Requisition Page. The requisition now has a status of Canceled. You are done.

New Year Requisitions Instructions (May 1 – June 30)

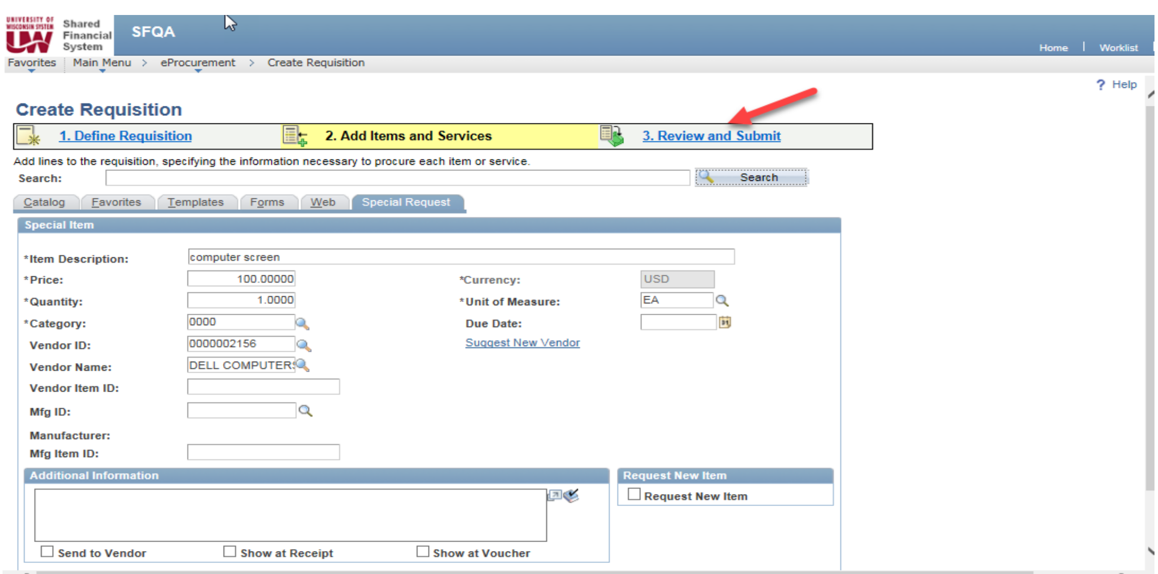
May 1st through June 30th, requisitions for the New Fiscal can be entered into the System. These requisitions must be flagged as NEW YEAR requisitions. The below steps give instructions on identifying the requisitions as a NEW YEAR. The screen shots assume FY18 is the NEW YEAR.

1. Follow the path below to create a requisition.
   Main Menu > eProcurement > Create Requisition

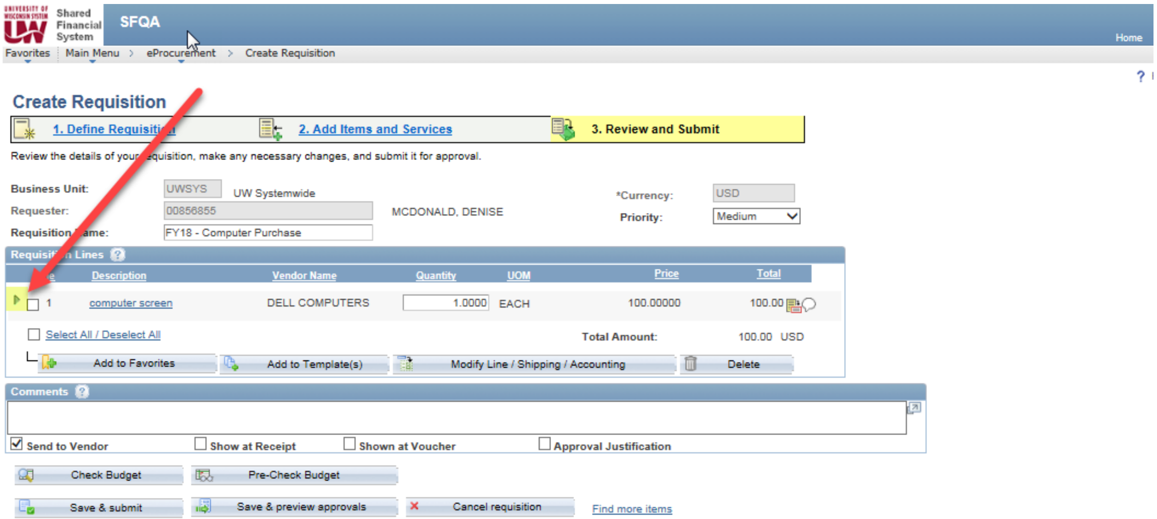
2. Add FY18 to the beginning of the Requisition Name Field.



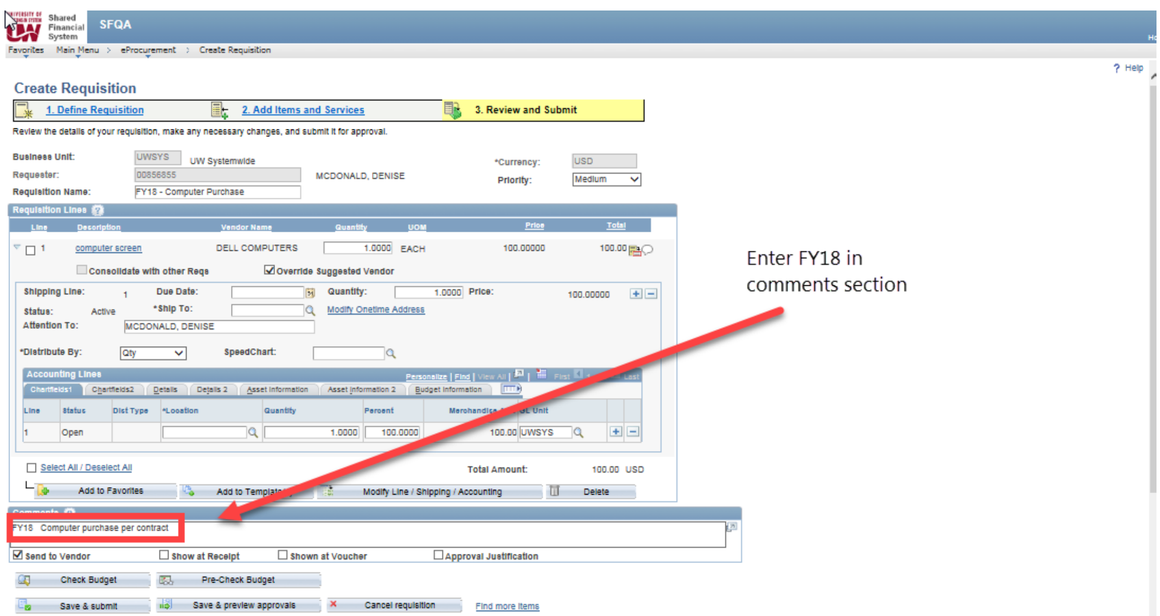
3. Add item(s) as normal.
4. After clicking Add Item, click the Review and Submit tab.



5. Click the carrot to Expand



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



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