

HOBART
AND
WILLIAM SMITH
COLLEGES

eProcurement Procedures

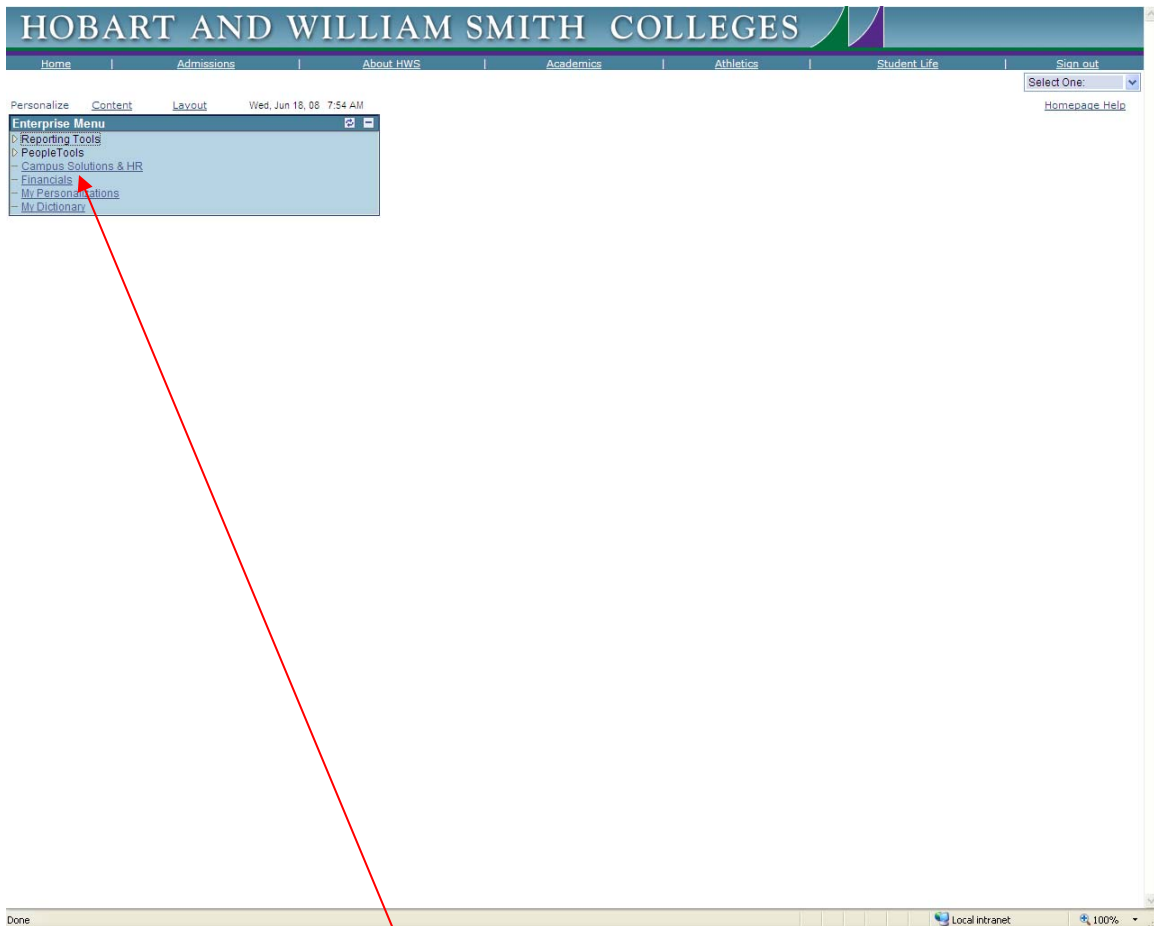
Table of Contents

Sign in to PeopleSoft.....	2
Create Requisition – Special Item	5
Create Requisition – Fixed Cost Service.....	19
Modify Line Information.....	21
Favorites	24
Receive Items	26
Manage Requisitions.....	29
Approve Requisitions.....	31

Sign in to PeopleSoft

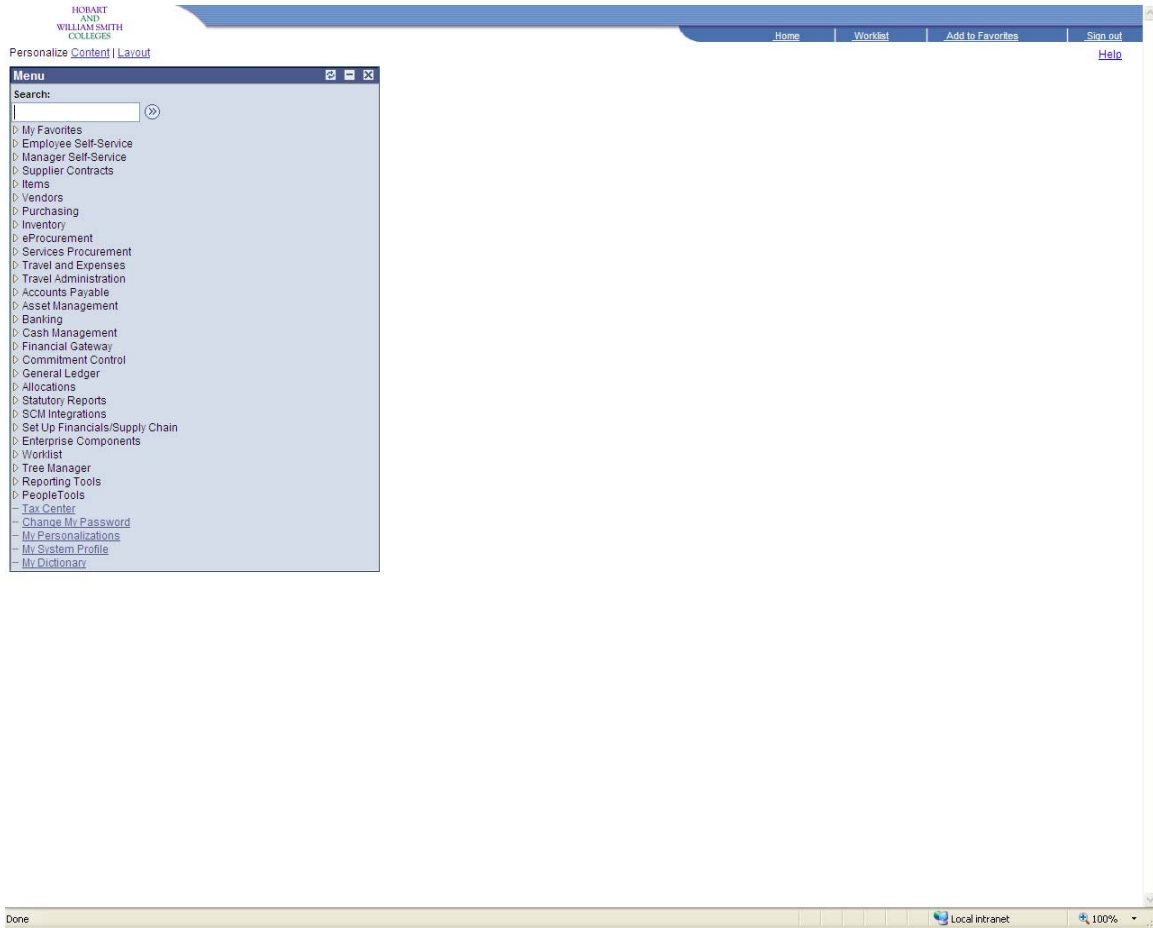
The screenshot shows the PeopleSoft Portal for Hobart and William Smith Colleges. At the top, there is a blue header with the college name and a navigation menu with links for Home, Admissions, About HWS, Academics, Athletics, Student Life, and Sign out. Below the header, there is a status bar showing 'Personalize', the date 'Tue, May 20, 08', and the time '8:39 PM'. The main content area is divided into two sections: 'Signon' and 'News'. The 'Signon' section contains a form with 'User ID:' and 'Password:' labels, each followed by a text input field, and a yellow 'Sign In' button. The 'News' section contains a link for 'View All Articles and Sections'. At the bottom of the page, there is a footer with 'Done', 'Local intranet', and '100%'.

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

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Manage ERP Integration
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Sourcing
 - Engineering
 - Manufacturing Definitions

Create Requisition

Specify Business Unit and Requester

*Business Unit: Hobart & William Smith

*Requester:

Requisition Summary

There are no lines on this requisition.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (): 0

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):

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Manage ERP Integration
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center
 - Reports
 - Administer Procurement
 - My Profile

Look Up Requester

Requester: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 1-8 of 8 Last

Requester	Name
BOWYER	Walter Bower
CRAIG	David Craig
DEDENUS	Christine de Denus
JSMILLER	Justin Miller
PELKEY	Erin Pelkey
SLENTZ	Kathy Slentz
YASSIN	Faten Yassin
ZUK	William Zuk

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (0): 0

Select the Requester by clicking on their name in the list. The screen will look similar to the one below:

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Manage ERP Integration
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center
 - Reports
 - Administer Procurement
 - My Profile

Create Requisition

Specify Business Unit and Requester

*Business Unit: HWS01 Hobart & William Smith

*Requester: PELKEY Erin Pelkey

OK

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (0): 0


Click on the OK button to proceed.

The following screen is displayed:


The screenshot shows the 'Create Requisition' web application. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign Out'. The left sidebar menu is expanded to 'Create Requisition'. The main content area has a progress bar with three steps: '1. Define Requisition' (active), '2. Add Items and Services', and '3. Review and Submit'. Below the progress bar, there is a form for defining the requisition. The 'Business Unit' is 'HWS01' (Hobart & William Smith). The 'Requester' is 'ERIN PELKEY' (Erin Pelkey). The '*Currency' is 'USD'. The 'Requisition Name' field is empty. The 'Priority' is set to 'Medium'. Below the form is a 'Line Defaults' section with a 'Continue' button. A red 'X' is drawn over the 'Line Defaults' section and the 'Continue' button. A 'Requisition Summary' box on the left indicates there are no lines on the request.

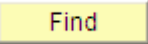
Creating a purchase requisition is a three-step process. The first is to define the requisition. If this requisition requires special attention by the Business Office, please indicate it by typing in the requisition name field. Some examples are: Confirmation Only, Fax – Do Not Mail or Attachment Required. 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:

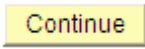
Changes can be made if necessary to any of the information. The changes can be applied to all lines that are created in the requisition.

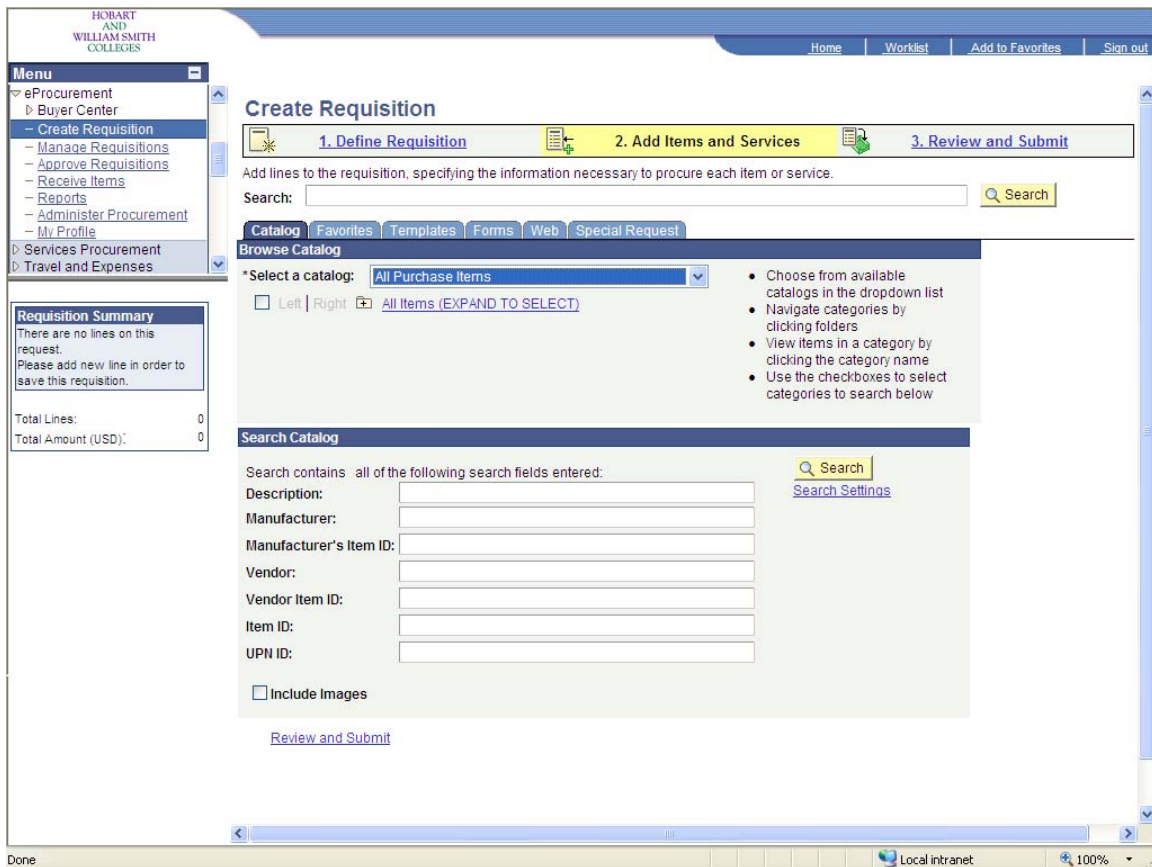
It is most efficient to select the Vendor for the requisition at this time. In order to do this, click on the  next to the Vendor field. The following screen is displayed:

Type a portion of the name of the vendor for which you are creating the requisition then click . This will bring up a list of vendors whose name contains what you typed. You can select the vendor by

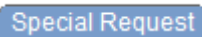
clicking on the Vendor Id link next to the vendor name. Ensure that the address is the correct address for ordering. If it is not, please send an email to Janette Brower at brower@hws.edu with the vendor name and the correct ordering address.

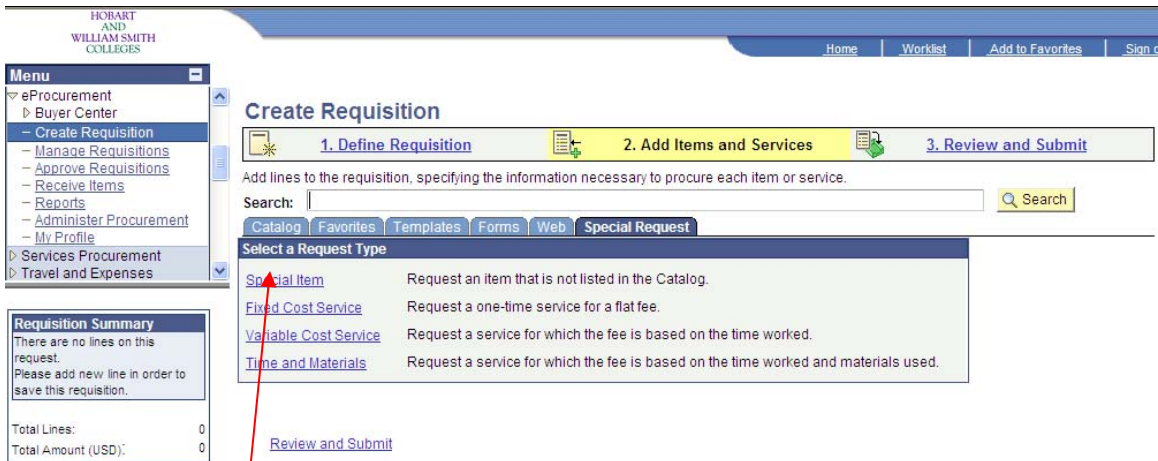
If the vendor you are looking for is not in the system, also email Janette with the name and address information to establish a new vendor in the system. (Note: a new vendor cannot be selected until it is set up in the system, so leave the Vendor field blank in these cases.)

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



The screenshot displays the 'Create Requisition' web application interface. The page title is 'Create Requisition' and it shows three steps: 1. Define Requisition, 2. Add Items and Services, and 3. Review and Submit. A search bar is present with a 'Search' button. Below the search bar are tabs for 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Catalog' tab is active, showing a dropdown menu for 'All Purchase Items' and a list of items. A 'Search Catalog' section contains several input fields for 'Description', 'Manufacturer', 'Manufacturer's Item ID', 'Vendor', 'Vendor Item ID', 'Item ID', and 'UPN ID'. A 'Review and Submit' button is at the bottom of the search section. On the left side, there is a 'Menu' and a 'Requisition Summary' box indicating that there are no lines on the request.

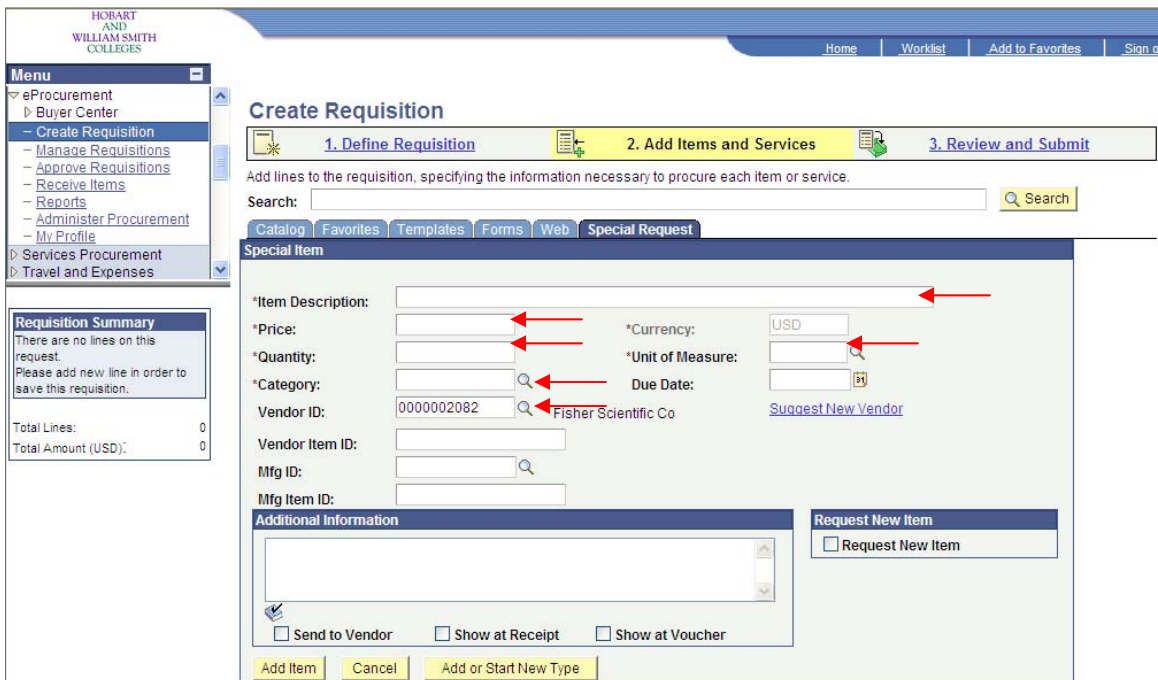
The page above may be displayed, if it is, click on the  tab to add items to the requisition.



Click on Special Item link to add an item to the purchase requisition.

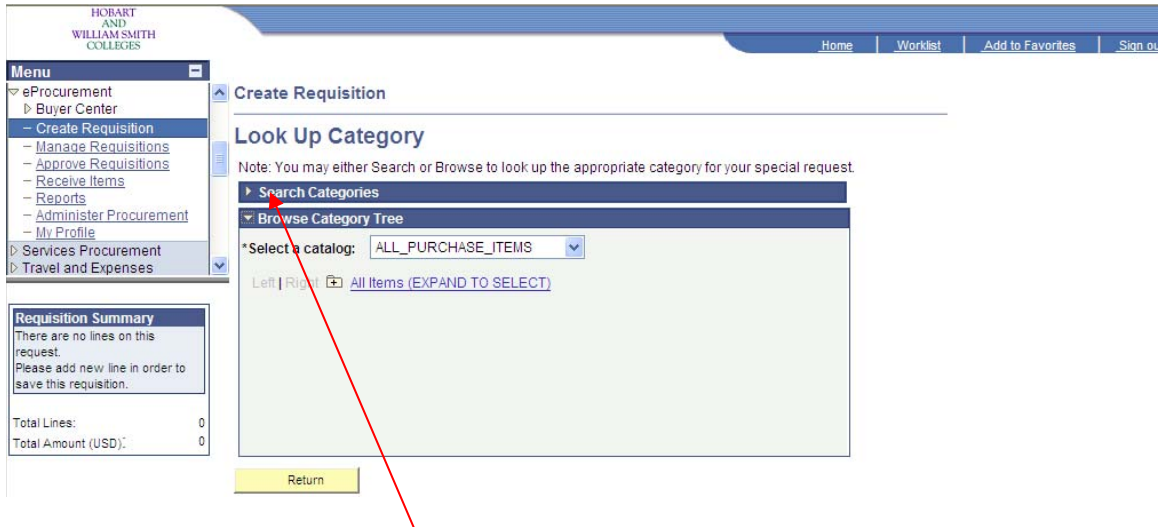
Example for this purchase requisition:

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:

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ Search Categories

Search By

Categories				Customize Find	First	1 of 1	Last
	Catalog	Category	Description	Find in Tree			
1							

▼ Browse Category Tree

*Select a catalog:

Left | Right [All Items \(EXPAND TO SELECT\)](#)

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 (Note: to find a list of all Categories, just click without typing in the box). In this example, we used “lab” and the following results were returned:

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

	Catalog	Category	Description	Find in Tree
1	ALL PURCHASE ITEMS	LAB SUPPLIES	Laboratory Supplies	
2	ALL PURCHASE ITEMS	LAB EQUIPMENT	Laboratory Equipment	
3	ALL PURCHASE ITEMS	CONSTRUCTION LABOR	Construction Labor	

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:

Menu

- eProcurement
 - Buyer Center
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) | [Favorites](#) | [Templates](#) | [Forms](#) | [Web](#) | [Special Request](#)

Special Item

*Item Description: 250 ml Beakers

*Price: 24.21000 *Currency: USD

*Quantity: 10.0000 *Unit of Measure: EA

*Category: LAB SUPPLIES Due Date:

Vendor ID: 000002082 Fisher Scientific Co [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

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:

HOBART AND WILLIAM SMITH COLLEGES

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Vendor Search

Vendor ID:

Name:

Short Vendor

Name:

City:

Country: State:

Postal Code:

Find

Reset

[Suggest Vendor](#)

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Enter search criteria to find a vendor.
[Return to Special Request](#)

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**

HOBART AND WILLIAM SMITH COLLEGES

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Vendor Search

Vendor ID:

Name: fish

Short Vendor

Name:

City:

Country: State:

Postal Code:

Find

Reset

[Suggest Vendor](#)

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Enter search criteria to find a vendor.
[Return to Special Request](#)

The search results are displayed:

HOBART AND WILLIAM SMITH COLLEGES

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Vendor Search

Vendor ID:
 Name:
 Short Vendor:
 Name: [Suggest Vendor](#)
 City:
 Country: State:
 Postal Code:

Vendor ID	Name	Location	Address	City	State
1 0000002082	Fisher Scientific Co	Main	Acct 362410/002	Boston	MA
2 0000002082	Fisher Scientific Co	Purchasing	3970 Johns Creek Court	Suwanne	GA
3 0000002184	George Fisher	Main	3490 Sid White Road	Bluff Point	NY
4 000006296	That Fish Place	Main	237 Centerville Road	Lancaster	PA

[Return to Special Request](#)

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.

HOBART AND WILLIAM SMITH COLLEGES

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Requisition Summary

There are no lines on this request.
Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Special Item

*Item Description: 250 ml Beakers
 *Price: 24.21000 *Currency: USD
 *Quantity: 10.0000 *Unit of Measure: EA
 *Category: LAB SUPPLIES Due Date:
 Vendor ID: 0000002082 Fisher Scientific Co [Suggest New Vendor](#)
 Vendor Item ID:
 Mfg ID:
 Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

To finalize this item click the 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.

Menu

- eProcurement
 - Buyer Center
 - Create Requisition**
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Requisition Summary

Description	Qty	UOM
250 ml Beakers	10	EA
100 ml Graduated Cylinders	10	EA
Lab Disc Magnetic Stirrer	1	EA
Total Lines:		3
Total Amount (USD):		618.59

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Special Item

*Item Description:

*Price: *Currency: USD

*Quantity: *Unit of Measure:

*Category:

Vendor ID: 0000002082 Fisher Scientific Co [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

When all of the items have been added, click



to go to the final step of the purchase requisition process:

HOBART AND WILLIAM SMITH COLLEGES

Home | Worklist | Add to Favorites | Sign out

Create Requisition

1. 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: HWS01 Hobart & William Smith
 Requester: PELKEY Erin Pelkey *Currency: USD
 Requisition Name: Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	250 ml Beakers	Fisher Scientific Co	10.0000	Each	24.21000	242.10
2	100 ml Graduated Cylinders	Fisher Scientific Co	10.0000	Each	19.50000	195.00
3	Lab Disc Magnetic Stirrer	Fisher Scientific Co	1.0000	Each	181.49000	181.49
Total Amount:						618.59 USD

Justification/Comments

Send to Vendor | Show at Receipt | Show at Voucher

Check Budget

Save & submit | Save & preview approvals | Cancel requisition | Find more items

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 **Save & preview approvals** button may be used to save the requisition and come back to update it another time.

To submit the finalized purchase requisition, click **Save & submit**. The purchase requisition has been created, the confirmation screen displays and it will now go through the approval process, if required.

HOBART AND WILLIAMSMITH COLLEGES

Home | Worklist | Add to Favorites

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Confirmation

Requested For: Erin Pelkey Number of Lines: 3
 Requisition Name: 0000000194 Total Amount: 618.59 USD
 Requisition ID: 0000000194
 Business Unit: HWS01
 Priority: Medium
 Budget Status: Not Checked

No approvals required

Submit Edit Requisition Apply Approval Changes Check Budget

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

Requisition Summary		
Description	Qty	UOM
250 ml Beakers	10	EA
100 ml Graduated Cylinders	10	EA
Lab Disc Magnetic Stirrer	1	EA
Total Lines:		3
Total Amount (USD):		618.59

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.

The screenshot shows the Oracle eProcurement interface. On the left is a navigation menu with 'eProcurement' > 'Buyer Center' > 'Create Requisition' selected. Below the menu is a 'Requisition Summary' box indicating 0 total lines and 0 total amount. The main area is titled 'Create Requisition' and has three steps: 1. Define Requisition, 2. Add Items and Services, and 3. Review and Submit. A search bar is present. Below the search bar are tabs for 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Special Request' tab is active, showing a 'Select a Request Type' section with four options: 'Special Item', 'Fixed Cost Service' (highlighted with a red arrow), 'Variable Cost Service', and 'Time and Materials'. A 'Review and Submit' link is at the bottom.

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

The screenshot shows the 'Fixed Cost Service' requisition form. The 'Service Description' field is highlighted with a red arrow. Below it are fields for 'Value of Service', 'Category', and 'Vendor ID', each also highlighted with a red arrow. The 'Currency' is set to 'USD'. There are fields for 'Start Date', 'End Date', 'Quote Number', and 'Quote Date'. Below these is an 'Additional Information' section with a scrollable text area. At the bottom are checkboxes for 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher', and buttons for 'Add Service', 'Cancel', and 'Add or Start New Type'.

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.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Receive Items
 - Reports
 - My Profile
 - Services Procurement
 - Commitment Control
 - SCM Integrations
 - Set Up Financials/Supply

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0
Total Amount (USD): 0

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Fixed Cost Service

* Service Description: Web Page Consulting

* Value of Service: 1000.00000 * Currency: USD

* Category: CONSULTING SERVICE

Vendor ID: 0000000486 AudioVideoweb.com LLC [Suggest New Vendor](#)

Start Date: End Date:

Quote Number: Quote Date:

Additional Information

Send to Vendor Show at Receipt Show at Voucher

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.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Receive Items
 - Reports
 - My Profile
 - Services Procurement
 - Commitment Control
 - SCM Integrations
 - Set Up Financials/Supply

Requisition Summary

Description	Qty	UOM
Web Page Consulting	1	EA

Total Lines: 1
Total Amount (USD): 1,000.00

Create Requisition

1. 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: HWS01 Hobart & William Smith

Requester: CWILLIAMS Catherine Williams *Currency: USD

Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Web Page Consulting	AudioVideoweb.com LLC	1.0000	Each	1,000.00000	1,000.00

Select All / Deselect All

Total Amount: 1,000.00

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

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):

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	250 ml Beakers	Fisher Scientific Co	10.0000	Each	24.21000	242.10
2	100 ml Graduated Cylinders	Fisher Scientific Co	10.0000	Each	19.50000	195.00
3	Lab Disc Magnetic Stirrer	Fisher Scientific Co	1.0000	Each	181.49000	181.49

Total Amount: 618.59 USD

Click on **Modify Line / Shipping / Accounting** , the following screen displays:

ORACLE

Home | Worklist | Add to Favorites | Sign out

Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To: [Modify Shipping Address](#)

Due Date: Attention:

Accounting Information

Chartfields | Details | Asset Information | (222)

Percent	Location	GL Unit	Fund	Dept	Program	Account	PC Bus Unit	Project	Activity	My Reference
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

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 to apply the information to the lines of the requisition. The following screen displays:

Menu

Search:

- ▶ My Favorites
- ▶ Employee Self-Service
- ▶ Manager Self-Service
- ▶ Supplier Contracts
- ▼ eProcurement
 - ▶ Buyer Center
 - Create Requisition
 - [Manage Requisitions](#)
 - [Receive Items](#)
 - [Reports](#)
 - My Profile
- ▶ Services Procurement
- ▶ SCM Integrations
- ▶ Set Up Financials/Supply Chain

Distribution Change Options

For the selected requisition lines, apply distribution changes to

- All Distribution Lines**
Apply changes to all existing distribution lines.
- Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK

Cancel

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:

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Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Requisition Summary

Description	Qty	UOM
250 ml Beakers	10	EA
100 ml Graduated Cylinders	10	EA
Lab Disc Magnetic Stirrer	1	EA

Total Lines: 3
Total Amount (USD): 618.59

Create Requisition

1. 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: HWS01 Hobart & William Smith
Requester: PAPARO Michael Paparo *Currency: USD
Requisition Name: Priority: Medium

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	250 ml Beakers	Fisher Scientific Co	10.0000	Each	24.21000	242.10
2	100 ml Graduated Cylinders	Fisher Scientific Co	10.0000	Each	19.50000	195.00
3	Lab Disc Magnetic Stirrer	Fisher Scientific Co	1.0000	Each	181.49000	181.49

Select All / Deselect All
Total Amount: 618.59 U

Send to Vendor | Show at Receipt | Show at Voucher

Check Budget

Save & submit | Save & preview approvals | Cancel requisition | Find more items

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

<input checked="" type="checkbox"/>	1	250 ml Beakers
<input checked="" type="checkbox"/>	2	100 ml Graduated Cylinders

Then click . The item is added to the Favorite list and the following confirmation is displayed:

Confirmation
 The following item(s) were added to your favorites:
 250 ml Beakers
 100 ml Graduated Cylinders

Do not show this message again

Close

Click **Close** to return to the requisition.

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:

ORACLE

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
 - Receive Items
 - Reports
 - Administer Procurement
 - My Profile
 - Services Procurement
 - Travel and Expenses

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | **Favorites** | Templates | Forms | Web | Special Request

Group Name	Description	Type	Description	Vendor	Status	Price	Curr	UOM	Quantity	
Ungrouped Items		<input type="checkbox"/>	250 ml Beakers	Fisher Scientific Co	Active	24.21000	USD	EA	1.0000	<input type="button" value="Add"/>
		<input type="checkbox"/>	100 ml Graduated Cylinders	Fisher Scientific Co	Active	19.50000	USD	EA	1.0000	<input type="button" value="Add"/>

Select All / Deselect All

[Review and Submit](#)

Requisition Summary

Description	Qty	UOM
250 ml Beakers	10	EA
100 ml Graduated Cylinders	10	EA
Lab Disc Magnetic Stirrer	1	EA

Total Lines: 3
 Total Amount (USD): 618.59

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:

The screenshot displays the Oracle eProcurement 'Receive Items' screen. The interface includes a navigation menu on the left, a search bar, and a main content area. The main content area shows a summary of 3 lines open for receiving and a table of requisition lines. The table has the following data:

Reg BU	Requisition	Item Description	Tot Reg Qty/Amt	Accepted to Date	UOM	Ship To	Vendor
<input type="checkbox"/>	HWS01	0000000386	250 ml Beakers	10	0	EA	ROSENBERG FISHER SC - 001
<input type="checkbox"/>	HWS01	0000000386	100 ml Graduated Cylinders	10	0	EA	ROSENBERG FISHER SC - 001
<input type="checkbox"/>	HWS01	0000000386	Lab Disc Magnetic Stirrer	1	0	EA	ROSENBERG FISHER SC - 001

Below the table, there are buttons for 'Check All', 'Clear All', 'Inquire Receipts', and 'Inquire Return to Vendors'. The 'Check All' button is highlighted in the original image.

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:

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Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page |

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions
 - Receive Items**
 - Reports
 - My Profile
- Services Procurement
- SCM Integrations
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My Personalizations
- My System Profile
- My Dictionary

Receive Items

New Receipt

Business Unit: HWS01

Receipt Status: Open

*Received Date: 05/20/2008

[Relect Shipment](#)

Line	Item Id	Item Description	Received Qty	*UOM	Accept Qty
1		250 ml Beakers	10.0000	EA	10.0000
2		100 ml Graduated Cylind	10.0000	EA	10.0000
3		Lab Disc Magnetic Stirr	1.0000	EA	1.0000

[Save Receipt](#)

[Add New Receipt](#) | [Inquire Return to Vendors](#) | [Inquire Receipts](#)

Done Local intranet 100%

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, 0000000157, is saved and Job, RECV_00, has been scheduled for process (Process Instance = 7715). (10300,253)

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:

The screenshot displays the Oracle eProcurement 'Manage Requisitions' interface. On the left is a navigation menu with 'Manage Requisitions' selected. The main area contains a search form and a table of requisitions. A red arrow points to the '<Select Action>' dropdown menu in the last row of the table.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000090	0000000090	HWS01	08/04/2008	Approved	Not Chk'd	618.59USD	<Select Action...> Go
0000000055	0000000055	HWS01	06/10/2008	Pending	Not Chk'd	445.00USD	<Select Action...> Go
0000000054	0000000054	HWS01	06/10/2008	Approved	Not Chk'd	288.00USD	<Select Action...> Go
0000000053	0000000053	HWS01	06/10/2008	Cancelled	Not Chk'd	0.00USD	<Select Action...> Go
0000000051	0000000051	HWS01	06/10/2008	Approved	Not Chk'd	0.00USD	<Select Action...> Go
0000000013	0000000013	HWS01	05/31/2008	PO(s) Dispatched	Valid	10.00USD	<Select Action...> Go

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 screenshot shows the Oracle Manage Requisitions web application. On the left is a navigation menu with options like 'My Favorites', 'Employee Self-Service', and 'Manage Requisitions'. The main content area is titled 'Manage Requisitions' and contains a search form and a table of requisitions.

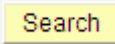
Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.


Business Unit: HWS01 Requisition Name: Request Status: Budget Status:
Requisition ID: Date From: 05/14/2008 Date To: 05/21/2008 Requester: Entered By: PO ID:

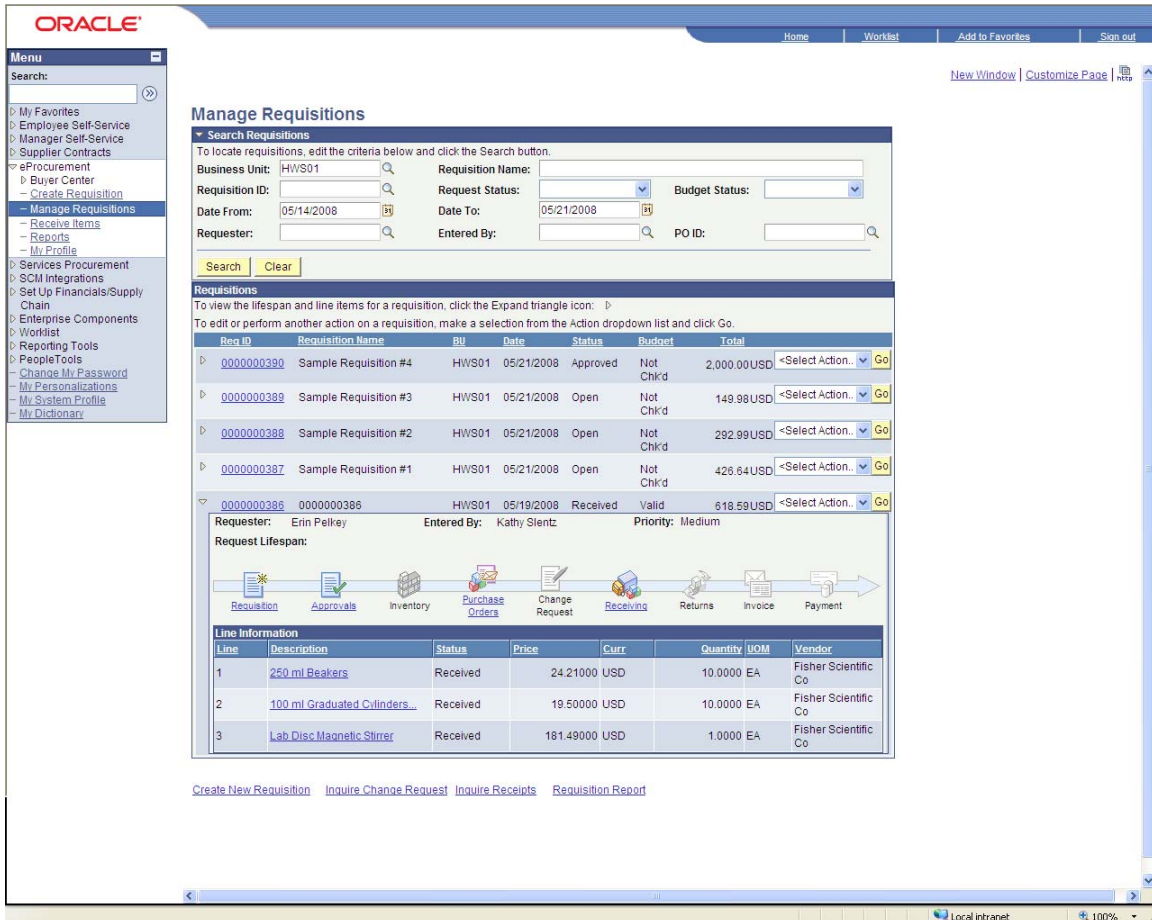
Requisitions
To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000390	Sample Requisition #4	HWS01	05/21/2008	Approved	Not Chkd	2,000.00USD	<Select Action...> Go
0000000389	Sample Requisition #3	HWS01	05/21/2008	Open	Not Chkd	149.98USD	<Select Action...> Go
0000000388	Sample Requisition #2	HWS01	05/21/2008	Open	Not Chkd	292.99USD	<Select Action...> Go
0000000387	Sample Requisition #1	HWS01	05/21/2008	Open	Not Chkd	426.64USD	<Select Action...> Go
0000000386	0000000386	HWS01	05/19/2008	Received	Valid	618.59USD	<Select Action...> Go

[Create New Requisition](#) [Inquire Change Request](#) [Inquire Receipts](#) [Requisition Report](#)


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 . 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.



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Home | Worklist | Add to Favorites | Sign out

New Window | Customize Page | 

Menu

Search:

- My Favorites
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions**
 - Receive Items
 - Reports
 - My Profile
- Services Procurement
- SCM Integrations
- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Reporting Tools
- PeopleTools
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Manage Requisitions

Search Requisitions

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


Business Unit: Requestion Name:

Requisition ID: Request Status: Budget Status:






Date From: Date To:

Requester: Entered By: PO ID:

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	Budget	Total	
 000000390	Sample Requisition #4	HWS01	05/21/2008	Approved	Not Chkd	2,000.00USD	<Select Action...> <input type="button" value="Go"/>
 000000389	Sample Requisition #3	HWS01	05/21/2008	Open	Not Chkd	149.98USD	<Select Action...> <input type="button" value="Go"/>
 000000388	Sample Requisition #2	HWS01	05/21/2008	Open	Not Chkd	292.98USD	<Select Action...> <input type="button" value="Go"/>
 000000387	Sample Requisition #1	HWS01	05/21/2008	Open	Not Chkd	426.64USD	<Select Action...> <input type="button" value="Go"/>
 000000386	000000386	HWS01	05/19/2008	Received	Valid	618.59USD	<Select Action...> <input type="button" value="Go"/>

Requester: Erin Palkey Entered By: Kathy Slentz Priority: Medium

Request Lifespan:

Requisition  Approvals  Inventory  Purchase Orders  Change Request  Receiving  Returns  Invoice  Payment

Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	250 ml Reakers	Received	24.21000	USD	10.0000	EA	Fisher Scientific Co
2	100 ml Graduated Cylinders...	Received	19.50000	USD	10.0000	EA	Fisher Scientific Co
3	Lab Disp. Magnetic Stirrer	Received	181.49000	USD	1.0000	EA	Fisher Scientific Co

[Create New Requisition](#) [Inquire Change Request](#) [Inquire Receipts](#) [Requisition Report](#)

Local Intranet 100%

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: [REDACTED]@hws.edu Sent: Sat 5/31/2008 12:34 PM
To: [REDACTED]
Cc:
Subject: Approval is Requested for Requisition ID "0000000012" Line "1" Business Unit "Hobart & William Smith"

A requisition line has been entered which requires your attention.

Requester: [REDACTED]
Business Unit: Hobart & William Smith
Requisition ID: 0000000012
Requisition Name: 0000000012
Line: 1
Description: Sony Flat Screen Monitor
Date: 2008-05-31

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

http://ps-np-fin-tst.hws.edu:8000/ps/ps/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=HWS01&REQ_ID=0000000012&LINE_NBR=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:

Home | Worklist | Add to Favorites | Sign out

ORACLE

Menu

Search:

- ▶ My Favorites
- ▶ Employee Self-Service
- ▶ Manager Self-Service
- ▶ Supplier Contracts
- ▶ Items
- ▶ Vendors
- ▶ Purchasing
- ▶ Inventory
- ▶ eProcurement
- ▶ Services Procurement
- ▶ Travel and Expenses
- ▶ Travel Administration
- ▶ Accounts Payable
- ▶ Asset Management
- ▶ Banking
- ▶ Cash Management
- ▶ Financial Gateway
- ▶ Commitment Control
- ▶ General Ledger
- ▶ Allocations
- ▶ Statutory Reports
- ▶ SCM Integrations
- ▶ Set Up Financials/Supply Chain
- ▶ Enterprise Components
- ▶ Worklist
 - Worklist
 - Worklist Details
 - Navigator
- ▶ Tree Manager
- ▶ Reporting Tools
- ▶ PeopleTools
 - Tax Center
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Requisition Approval

Req Name: 0000000373
Total: 1,758.95 USD
Requester: [Elizabeth Parkhurst](#)
Entered on: 05/07/2008
Status: See Lines

Business Unit: HWS01
Requisition ID: 0000000373
Priority: Medium

Requester's Justification:
No justification entered by requester.

Line Information

	Line	Item Description	Vendor Name	Qty	UOM	Price	Curr
<input checked="" type="checkbox"/>	1	BLUE OFFICE COUCH	OFFICE SP -001	1.0000	EA	899.96000	USD
<input checked="" type="checkbox"/>	2	BROWN WOODEN MEETING TABLE	OFFICE SP -001	1.0000	EA	699.00000	USD
<input type="checkbox"/>	3	BLACK LEATHER CHAIR	OFFICE EQ -001	1.0000	EA	159.99000	USD

Select All / Deselect All

Review/Edit Approvers
Enter Approver Comments

[Return to Worklist](#)

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:

Enter Approver Comments

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).