



PeopleSoft v9.1

How to create a requisition

UH Purchasing Department,
December 2012

Step 1: To create a Requisition, click on the “Add a New Value” tab.
NAVIGATION: Purchasing—Requisitions—Add/Update Requisitions

The screenshot shows the Oracle Requisitions interface. At the top, the Oracle logo is displayed. Below it is a breadcrumb navigation path: Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions. The main heading is "Requisitions". Below the heading, there are two buttons: "Find an Existing Value" and "Add a New Value". The "Add a New Value" button is circled in red. Below these buttons, there are two input fields: "Business Unit:" with the value "00759" and a search icon, and "Requisition ID:" with the value "NEXT". At the bottom left, there is an "Add" button, which is also circled in red.

Step 2: The Requisition Form page is displayed. Click the “Requisition Defaults” link to enter the information that will be applied to the Requisition

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Form | Schedule | Approval | Documents

Maintain Requisitions

Requisition

Business Unit:	00759	Statu
Requisition ID:	NEXT	Budg
Requisition Name:	<input type="text"/>	<input type="checkbox"/> H

▼ Header

*Requester:	<input type="text" value="0099758"/>	Webster, Berenice D.	Requisition Defaults
*Requisition Date:	<input type="text" value="11/05/2012"/>	Requester Info	Add Comments
Origin:	<input type="text" value="000"/>	ALL UHCL DEPARTMENTS	Requisition Activities
			Amount Summary

Step 3: The Requisition Defaults page is displayed. Enter your buyer's last name (AREVALO, BURTON, CARPENTER). For our example, enter "CARPENTER" AND CLICK THE LOOKUP BUTTON AND SELECT CARPENTER, ANTHONY

The screenshot shows a web form with two main sections: "Line" and "Schedule".

Line Section:

- Buyer:** A text input field containing "CARPENTER,ANTHONY" with a magnifying glass icon to its right. This field is circled in red. To its right, the text "CARPENTER,ANTHONY B." is displayed.
- Unit of Measure:** An empty text input field with a magnifying glass icon to its right.
- Vendor:** An empty text input field with a magnifying glass icon to its right.
- Vendor Location:** An empty text input field with a magnifying glass icon to its right.
- Category:** An empty text input field with a magnifying glass icon to its right.
- Vendor Lookup:** A blue hyperlink.

Schedule Section:

- Ship To:** A text input field containing "H4004" with a magnifying glass icon to its right. To its right, the text "CHEMICAL ENGINEERING" is displayed.
- *Distribute By:** A dropdown menu with "Amount" selected.
- Due Date:** An empty text input field with a calendar icon to its right.
- Ultimate Use Code:** An empty text input field with a magnifying glass icon to its right.
- Attention To:** An empty text input field.
- One Time Address:** A label positioned to the right of the "Attention To" field.

Step 4: Click the link to search for the Vendor Number or enter the Vendor Number and Vendor Location if you know it.

Line			
Buyer:	<input type="text" value="CARPENTER ANTHONY"/> 	CARPENTER,ANTHONY B.	Unit of Measure: <input type="text"/>
Vendor:	<input type="text" value="0000009918"/> 	HIED INC	Vendor Location: <input type="text" value="003"/> 
Category:	<input type="text"/>		Vendor Lookup

The Vendor Search page is displayed. Enter the Vendor Name in the Name field and click “SEARCH”. For our example, enter **HIED**.

Search Criteria

Name: ShortName:

Alternate Vndr Name:

City:

Country: State:

Class: Postal:

Max Rows: Type:

1 to 2 of 2

Search Results

Sel	Vendor ID	Location	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>	0000009918	003	3	HIEDINC-001	HIED INC	Y
<input type="checkbox"/>	0000009918	V	3	HIEDINC-001	HIED INC	Y

The search results are displayed. Now select the **order address**. To see which address is the order address, select an address line by checking the **Sel** box and then click the “VENDOR DETAIL” link. Typically, the correct address will have an address preceded by an “O” (order address). Sometimes however, there is not an order address listed. In those cases, choose the address that matches the quote or the address that matches an address that was on a previous requisition.

Search Criteria

Name: ShortName:

Alternate Vndr Name:

City: State:

Country:

Postal:

Class:

Type:

Max Rows:

1 to 2 of 2

Search Results [Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2

Sel	Vendor ID	Location	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>	0000009918	003	3	HIEDINC-001	HIED INC	Y
<input type="checkbox"/>	0000009918	V	3	HIEDINC-001	HIED INC	Y

The Vendor Detail page is displayed. Check to see if the address is the Order Address. Also, check that the vendor is “Open for Ordering” which means the vendor is in good standing with the state. The flag must be “Y” or a Requisition cannot be processed using this vendor.

Click “OK” to return to the Vendor Lookup page.

Click “OK” again if the Vendor that was selected was the Vendor with the Order Address. If it was not, select the next address in the list and repeat the process until the Vendor with the Order Address (or address that matches the quote, etc.) is found. For our example, select **the second address line – Location 003**. Notice the address is preceded with “O”.

Vendor Detail

SetID:	00797	Vendor ID:	0000009918	Vendor Status:	Approved
Short Vendor Name:	HIEDINC-001			Vendor Classification:	Texas Corp
In City Limit:				HR Class:	
Vendor Name 2:				Persistence:	Regular
Alternate Vndr Name				Open For Ordering:	Y
Address:	00003	O:DBA COUGAR BYTE		Withholding Applicable:	Y
Corporate Vendor:	0000009918	HIED INC		Display VAT Flag:	N
Remit Vendor:	0000009918	HIED INC			

Vendor Types Customize | Find | View All | First 1 of 1 Last

Type	Long Name

OK Cancel Refresh

Step 5: Once the order address has been selected for the vendor, the Requisition Defaults page is displayed again, with the Vendor Location (Location Code) populated for the address that was chosen.

Line			
Buyer:	<input type="text" value="CARPENTER,ANTHONY"/>	CARPENTER,ANTHONY B.	Unit of Measure: <input type="text"/>
Vendor:	<input type="text" value="0000009918"/>	HIED INC	Vendor Location: <input type="text" value="003"/>
Category:	<input type="text"/>		Vendor Lookup
Schedule			
Ship To:	<input type="text" value="H4004"/>	CHEMICAL ENGINEERING	*Distribute By: <input type="text" value="Amount"/>
Due Date:	<input type="text"/>		
Ultimate Use Code:	<input type="text"/>		
Attention To:	<input type="text"/>		One Time Address
Distribution			

Step 6: The “Ship To” address will default based on your security setup. For this example, the requestor is Patricia Cooks in Chemical Engineering.

Schedule	
Ship To:	<input type="text" value="H4004"/>  CHEMICAL ENGINEERING
Due Date:	<input type="text"/> 
Ultimate Use Code:	<input type="text"/> 
Attention To:	<input type="text"/>

Distribution	
--------------	--

Step 7: Enter the Due Date which is the date you are creating the Requisition. For our example, enter **Today's Date**.

Schedule

Ship To:  CHEMICAL ENGINEERING

Due Date: 

Ultimate Use Code: 

Attention To:

Step 8: Enter the distribution information (Cost Center and Account). The information listed here will apply to all Lines on the Requisition. **Do not change “Distribute by”**. Enter the Speed Chart (this is the Speed Type) and tab out of the field. The cost center will populate automatically. For our example, enter **13278** for Speed Type.

Enter the Account. For our example, enter **53900** for Account.

Click “OK” to return to the Forms page.

The screenshot shows a requisition form with the following sections and fields:

- Schedule** section:
 - Ship To: CB0402A RECEIVING
 - Due Date: 11/05/2012
 - Ultimate Use Code: [empty]
 - Attention To: [empty]
 - *Distribute By: Amount (dropdown menu)
 - One Time Address: [empty]
- Distribution** section:
 - SpeedChart: 13278
- Distributions** section (table):

Dist	Percent	GL Unit	Entry Event	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
1	100.0000	00759		53900	2064	C0078	F0595	BP2013		NA

Buttons at the bottom: OK, Cancel, Refresh.

Step 9: Enter the Description of the first item to be purchased. NOTE: The Description field is only 254 characters long. If a longer description is need, enter a short description here and add the rest of the description on the Line Comments page. For our example, enter: **PEN**

The screenshot shows a software interface with a table titled "Line". The table has three columns: "Line", "Item", and "Description". The "Line" column contains the value "1". The "Description" column contains the value "PEN". Both the "1" and "PEN" are circled in red. The interface also includes tabs for "Details", "Ship To/Due Date", "Status", "Vendor Information", and "Item Info".

Line	Item	Description
1		PEN

If needed, enter a longer complete Description in the Line Comments field for the line selected. To access the Line Comments page, click the “dialogue balloon” icon on the Line.

The screenshot shows a software interface with a table. The table has the following columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, Status. The first row contains the following data: Line 1, Item (empty), Description PEN, Quantity 0.0000, UOM (empty), Category (empty), Price 0, Merchandise Amount 0.00, Status Open. A red circle highlights a dialogue balloon icon in the row for Line 1.

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status					
1		PEN	0.0000			0	0.00	Open					

The Line Comments page is displayed. Enter a complete long description for Item 1. **Click the “Send to Vendor” box** so the comments will print on the Requisition. **IF THIS BOX IS NOT CHECKED, THE COMMENTS WILL NOT PRINT ON THE REQUISITION.** Click “OK” to return to the Form page.

For our example, enter **any description you would like.**

Line Comments

Business Unit: 00759 Requisition Date: 11/05/2012
Requisition ID: NEXT Status: Open Line: 1

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All | First | 1 of 1 | Last

[Use Standard Comments](#) Comment Status: Active Inactivate Undo +

[Use Item Specifications](#)

ENTER AS MANY CHARACTERS AS YOU WOULD LIKE HERE ABOUT THE ITEM YOU ARE PURCHASING. THIS FIELD IS INDEFINITE AND WILL PRINT ON THE REQUISITION IF THE "SEND TO VENDOR" BOX IS CHECKED.

Send to Vendor Show at Receipt
 Show at Voucher

Associated Document

Attachment: Attach View Delete Email

From -> REQ 00759-NEXT

OK Cancel Refresh

Step 10: The Form page is displayed. Enter the Quantity you are ordering. For our example, enter **12**.

Line										Customize	Find	View					
Details										Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls	
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status									
1	<input type="text"/>	PEN	12.0000	EA	62080	0.26000	3.12	Open									

Step 11: Enter the UOM (Unit of Measure). For the valid values, click on the “magnifying glass”. For our example, enter **EA**.

Line										Customize	Find	View
Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls				
Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	PEN	12.0000	EA	62080	0.26000	3.12	Open				

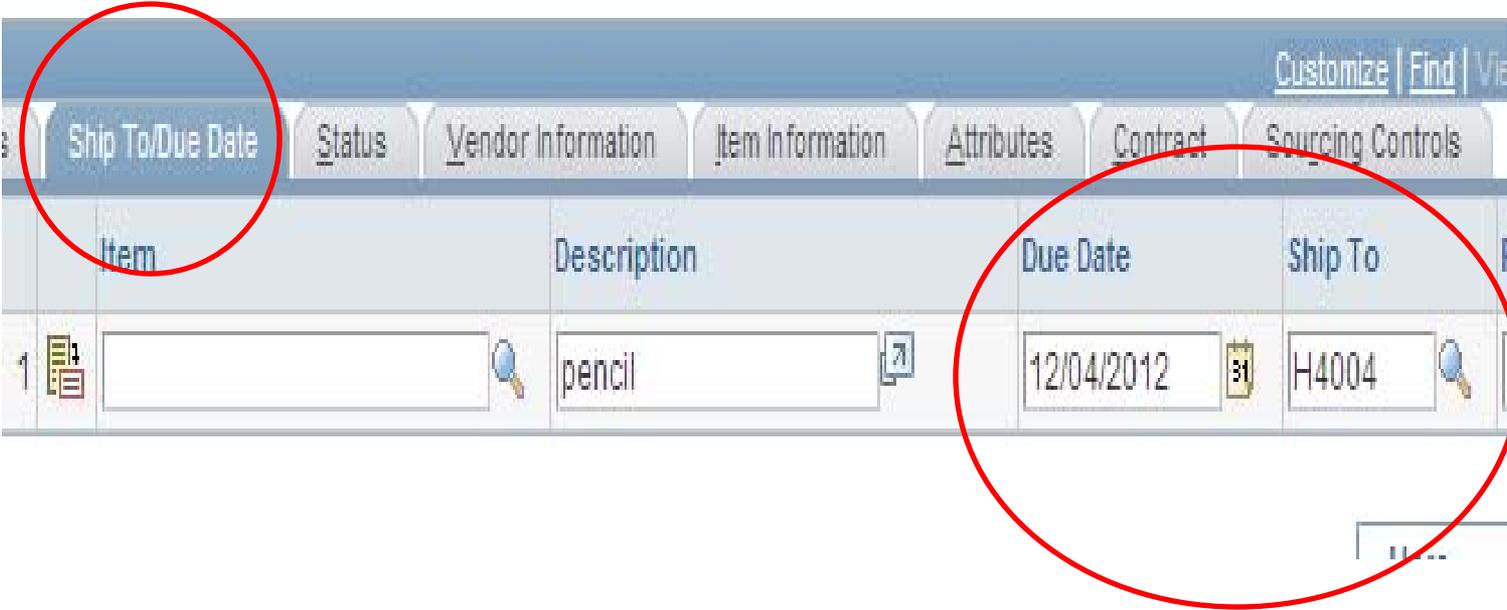
Step 12: Enter the Category Code which is a numeric value for the type of item being ordered. The term “Commodity Code” is synonymous with Category Code. Click on the “magnifying glass” icon next to the field to see the valid values. For our example, enter **62080** which is the Category Code for Pens (General Writing Types).

Line										Customize	Find	View
Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls				
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	PEN	12.0000	EA	62080	0.26000	3.12	Open				

Step 13: Enter the Price of the item. Once you tab out of the field, the Merchandise Amount will populate. For our example, enter **.26**.

Line										Customize	Find	View
Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls				
Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	<input type="text" value="PEN"/>	<input type="text" value="12.0000"/>	<input type="text" value="EA"/>	<input type="text" value="62080"/>	<input type="text" value="0.26000"/>	3.12	Open				

Step 14: Click on the “Ship To/Due Date” tab and change the “Ship To” address if the default is not correct. For our example, leave the default value.



Next we are going to add a second line item to our requisition. We are going to pay for it from the same cost center and account that we paid for the first line with. If you do not have another line item to order on your Requisition, you can skip to Step 16.

Entering another item on the requisition and paying from the same cost center

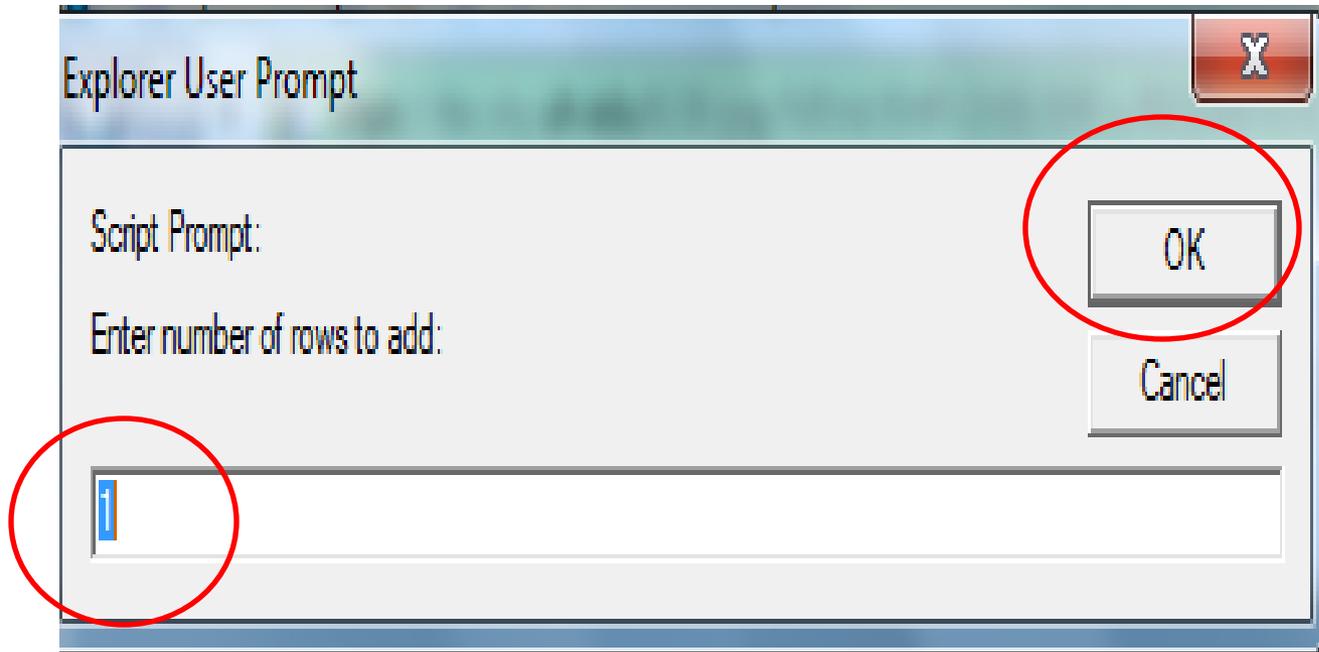
Step 15: Scroll to the right on Line 1 and click the “plus” button to insert more lines.



The screenshot shows a software interface for managing requisitions. At the top, there are navigation options: 'Contract', 'Sourcing Controls', and a search icon. Below this is a table with columns for 'Category', 'Price', 'Merchandise Amount', and 'Status'. The first row contains the values '62080', '0.26000', '3.12', and 'Open'. To the right of the 'Open' status, there are several icons: a speech bubble, a document, a clock, and a plus sign followed by an ellipsis. The plus sign icon is circled in red. To the right of the plus sign is a minus sign icon. The top right of the interface shows 'First 1 of 1 Last'.

Category	Price	Merchandise Amount	Status				
62080	0.26000	3.12	Open				

A prompt box is displayed prompting for the number of lines to be added. For this example we will add 1 row. Now click the “OK” button.



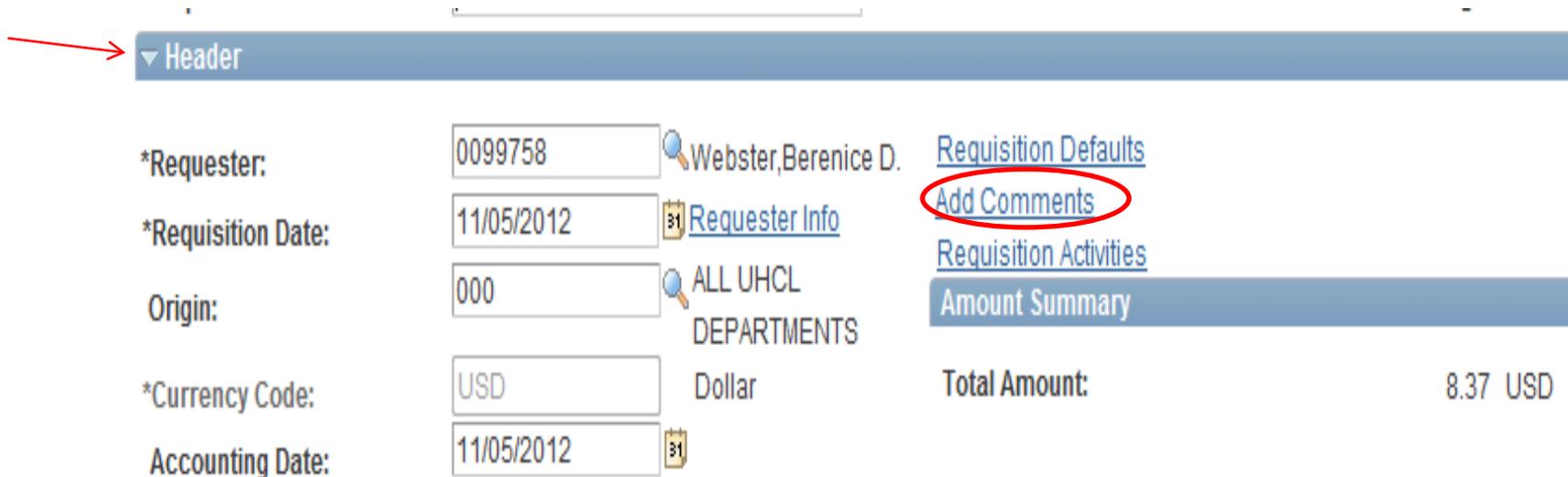
A second line is added to the Form page. Enter the following on Line 2:

Description **Pencil Sharpener**
Quantity **1**
UOM **EA**
Category Code **60560**
Price **5.25**

Click “save”.

Line										Customize	Find	View
Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Sourcing Controls					
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	<input type="text"/>	PEN	12.0000	EA	62080	0.26000	3.12	Open				
2	<input type="text"/>	PENCIL SHARPENER	1.0000	EA	60560	5.25000	5.25	Open				

Step 16: Click the “add comments” hyperlink in the Header section of the Form tab to enter comments related to the entire Requisition. These comments will be printed on the Requisition Coversheet.



▼ Header

*Requester:	0099758	 Webster, Berenice D.	Requisition Defaults
*Requisition Date:	11/05/2012	 Requester Info	Add Comments
Origin:	000	 ALL UHCL DEPARTMENTS	Requisition Activities
*Currency Code:	USD	Dollar	Amount Summary
Accounting Date:	11/05/2012		Total Amount: 8.37 USD

The Header Comments page is displayed. Enter any comments intended for the Vendor or the Purchasing Department such as: benefit, requested by, quote given by, contact phone number, and contact fax number.

Check the “Send to Vendor” box if these comments are to be printed on the requisition. **IF THIS BOX IS NOT CHECKED, THE COMMENTS WILL NOT PRINT ON THE REQUISITION.**

For our example, enter: **The order was placed by U.R. Fine for supplies required for a training class. Please contact John at 281-283-9999 if there are any questions. This quote was given by R.A. Way at Sage West.**

Click “OK” to return to the Form page. Click “save” to save the requisition changes.

Header Comments

Business Unit: 00759 Requisition Date: 11/05/2012
Requisition ID: 0000030258 Status: Open

*Sort Method:

Comment Time Stamp

*Sort Sequence:

Ascending

Sort

Comments

Find | View All First 1 of 1 Last

[Use Standard Comments](#)

Comment Status: Active

Inactivate

Undo



Order given by:
Contact phone number:
Contact fax number:
Requested by:



Send to Vendor

Show at Receipt

Show at Voucher

Associated Document

Attachment:

Attach

View

Delete

Email

From -> REQ 00759-0000030258

OK

Cancel

Refresh

Step 17: Click the “budget check” button at the top of the Requisition on the Forms tab.

Form | Schedule | Approval | Documents

Maintain Requisitions

Requisition

Business Unit:	00759	Status:	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition ID:	0000030258	Budget Status:	Not Chk'd	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Requisition Name:	<input type="text" value="0000030258"/>	<input type="checkbox"/>	Hold From Further Processing	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If the budget check is successful, the Budget Status will change to “Valid”. If you get a Budget Status of “Error”, contact your Business Administrator for assistance. The Requisition cannot be submitted into workflow with a Budget Status of “Error”.

Form Schedule Approval Documents

Maintain Requisitions

Requisition

Business Unit: 00759

Requisition ID: 0000030258

Requisition Name:

Status: Open



Budget Status: Valid

Hold From Further Processing

Entering a second distribution to pay for a Line Item

Now we are going to add a second distribution to Line 2 (Pencil Sharpener).

Step 18: Click on the “Schedule button” on Line 2.

Line												
Customize Find View All First 1-2 of 2 Last												
Details Ship To/Due Date Status Vendor Information Item Information Attributes Contract Sourcing Controls												
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1		PEN	12.0000	EA	62080	0.26000	3.12	Open				
2		PENCIL SHARPENER	1.0000	EA	60560	5.25000	5.25	Open				

Step 19: Click on the “Distribution button” to access the Distribution Page. The Distribution page is displayed.

The screenshot displays a software interface for managing requisitions. At the top, there are tabs for 'Form', 'Schedule', 'Approval', and 'Documents'. The 'Schedule' tab is selected and circled in red. Below the tabs, the page title is 'Maintain Requisitions' and the sub-section is 'Schedule'. Key information includes Business Unit: 00759, Requisition Date: 11/05/2012, Requisition ID: 0000030258, and Status: Open. A 'Return to Main Page' link is visible. The main content area shows a requisition line for 'PENCIL SHARPENER' with a quantity of 1.0000 and a merchandise amount of 5.25 USD. Below this, a 'Schedule' section is expanded to show details for line 1, including ship-to location CB0402A, quantity 1.0000, price 5.25000, due date 11/05/2012, and attention to Webster, Beren. The status is 'Active'. A 'Distribution' button, represented by a document icon with a downward arrow, is circled in red in the bottom right corner of the details table.

Form Schedule Approval Documents

Maintain Requisitions

Schedule

Business Unit: 00759 Requisition Date: 11/05/2012
Requisition ID: 0000030258 Status: Open

[Return to Main Page](#)

Line	Item:	Quantity:	Merchandise Amt:
2	PENCIL SHARPENER	1.0000 Each	5.25 USD

Schedule

Details

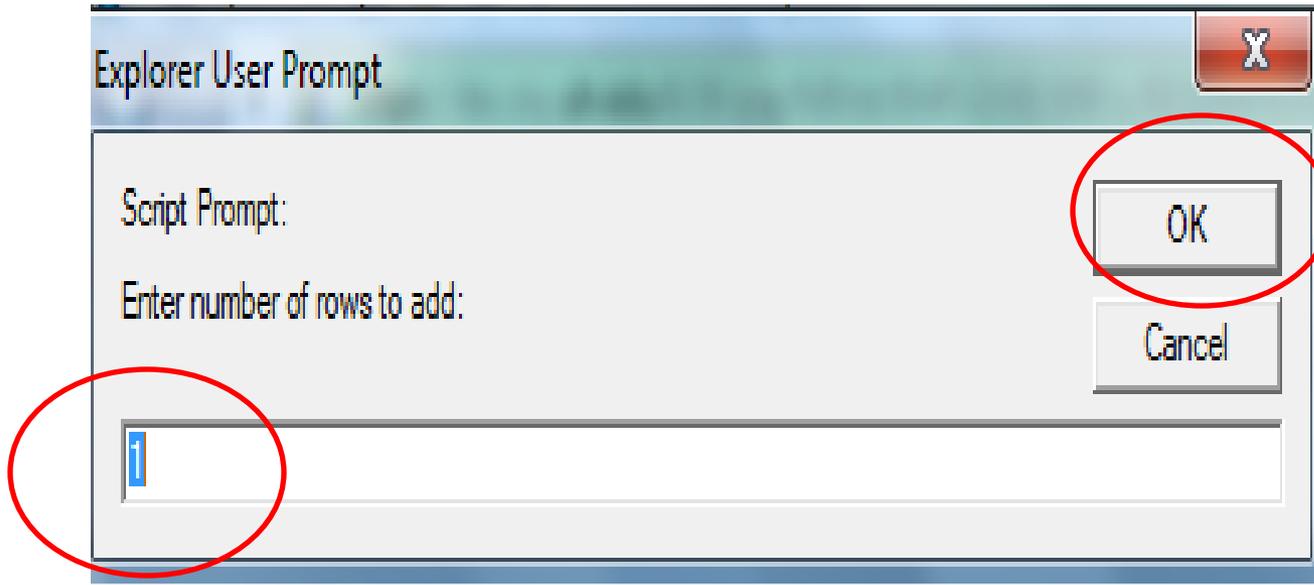
Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CB0402A	1.0000	5.25000	5.25	11/05/2012	Webster, Beren	Active

Step 20: Scroll to the right and click the “plus” button to add another distribution line.



A prompt box is displayed prompting for the number of lines to be added.

Click “ok”.



A second line is added to the Distribution page. Notice, the account and cost center information was copied from the first distribution line.

Distributions

Chartfields Details Asset Information Budget Information

Distrib		Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
1	Open	100.0000	5.25	00759		53900	2064	C0078	F0595	BP2013		NA
2	Open		0.00	00759		53900	2064	C0078	F0595	BP2013		NA

OK Cancel Refresh



Step 21: Update the distribution information on **both** Distribution Lines. For our example, enter the following:

Distribution Line 1: **change the amount to 3.00**

Distribution Line 2: **Amount – 2.25**

Account – leave as 53900

Cost Center – change to 2064-C0073-F1054-NA

Click “OK”.

Distributions												
Chartfields												
Details												
Asset Information												
Budget Information												
Distrib		Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program	Bud Rel	PC Bus Unit	Project
1	Open	100.0000	3.00	0759		53900	2064	C0078	F0595	BP2013		NA
2	Open		2.25	0759		53900	2064	C0073	F1054	BP2013		NA

OK Cancel Refresh

Step 22: Click “save” on the Schedule page.

Form **Schedule** Approval Documents

Maintain Requisitions

Schedule

Business Unit: 00759 **Requisition Date:**
Requisition ID: 0000030258 **Status:**

[Return to Main Page](#)

Line

2 **Item:** [PENCIL SHARPENER](#)

Schedule

Details 

Sched		*Ship To		Quantity	Price
1		CB0402A		1.0000	<input type="text" value="5.25000"/>

[Add Ship To Comments](#)

 Save  Return to Search  Notify  Refresh

Step 23: Click the Form tab and re-budget check the requisition.

Form Schedule Approval Documents

Maintain Requisitions

Requisition

Business Unit:	00759	Status:	Open	<input checked="" type="checkbox"/>
Requisition ID:	0000030258	Budget Status:	Not Chk'd	<input type="checkbox"/> 
Requisition Name:	<input type="text" value="0000030258"/>	<input type="checkbox"/>	Hold From Further Processing	

The requisition now has a valid status.

Maintain Requisitions

Requisition

Business Unit: 00759

Requisition ID: 0000030258

Requisition Name:

Status: Open



Budget Status: Valid

Hold From Further Processing

HOW TO UPLOAD SUPPORTING DOCUMENTATION (Document Imaging)

Step 1: Click the “add new document” button on the Documents tab.

Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Form Schedule Approval **Documents**

Business Unit: 00759 Requisition Date: 11/05/2012

Requisition ID: 0000030258 Status: Open

[Print Requisition Coversheet](#) Include Approval History

Requisitions Document Images

Display Active Documents Only **Add New Document**

Step 2: Click the “browse” button on the Document Upload page. The "Choose File" dialogue box is displayed.

Document Upload

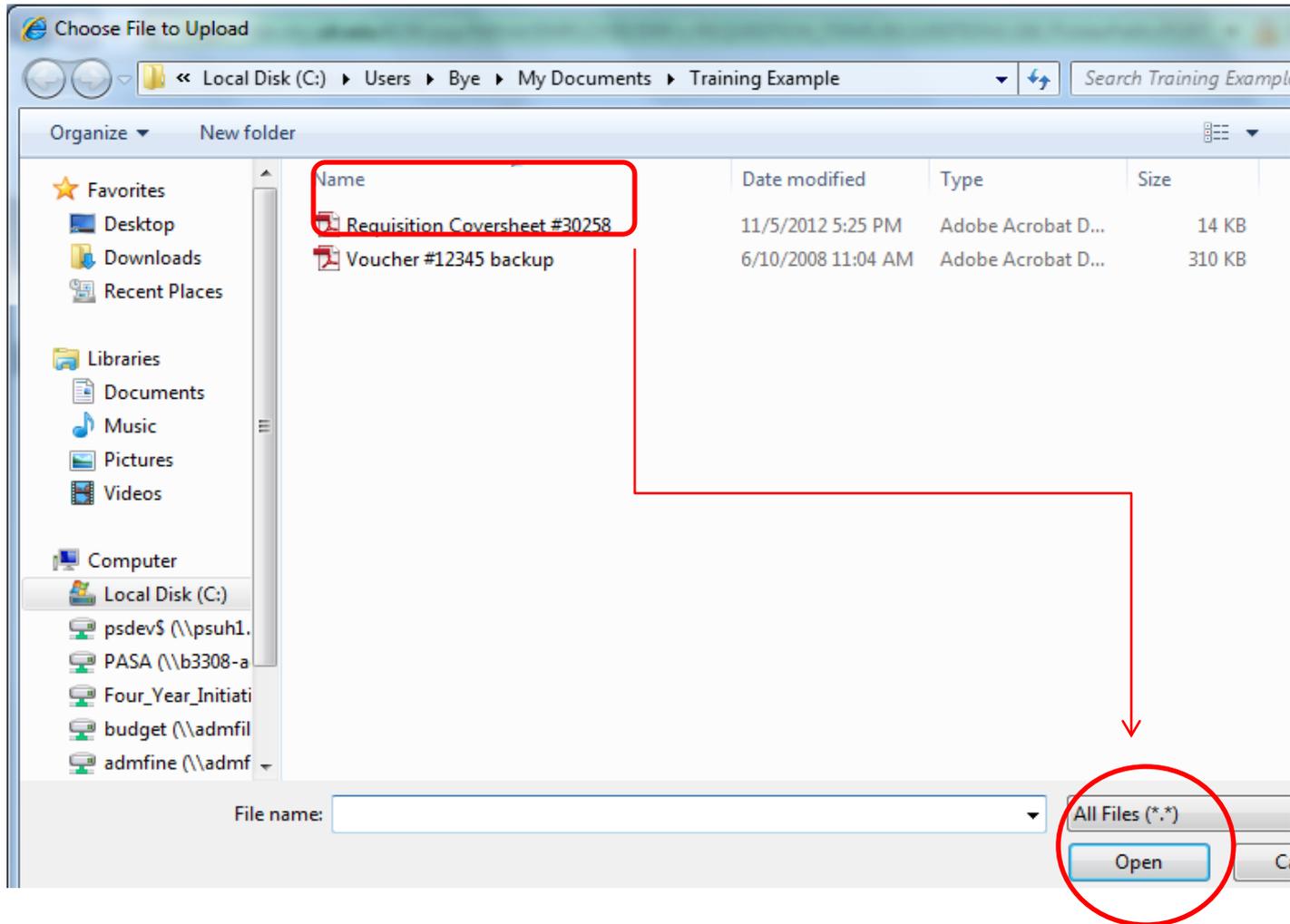
Instructions:

1. Select an image file for this transaction by clicking the **browse button** below.
2. Upload the selected file by clicking the **upload image button**.



The screenshot shows a web form titled "Select an Image" with a light green header. Below the header is a text input field. To the right of the input field is a "Browse..." button, which is circled in red. Below the input field is an "Upload Image" button.

Step 3: Navigate to where the supporting documentation is saved and select it. Click “open”. The file name of the supporting documentation is placed in the “Select an Image” section of the Document Upload box.



Step 4: Click “upload image” and the supporting documentation will be attached to the Requisition. After the upload is complete, the Requisition page will be displayed.

Req Document Upload

Instructions:

1. Select an image file for this transaction by clicking the **browse button** below.
2. Upload the selected file by clicking the **upload image button**.



Select an Image

C:\Users\Bye\Documents\Training Example\Requisition C

NOTE: Always open the attachment to make sure it is viewable. This is the image the auditors will examine when they are performing an audit.

Form	Schedule	Approval	Documents
----------------------	--------------------------	--------------------------	---------------------------

Business Unit:	00759	Requisition Date:	11/05/2012
Requisition ID:	0000030258	Status:	Open

[Print Requisition Coversheet](#) **Include Approval History**

Requisitions Document Images

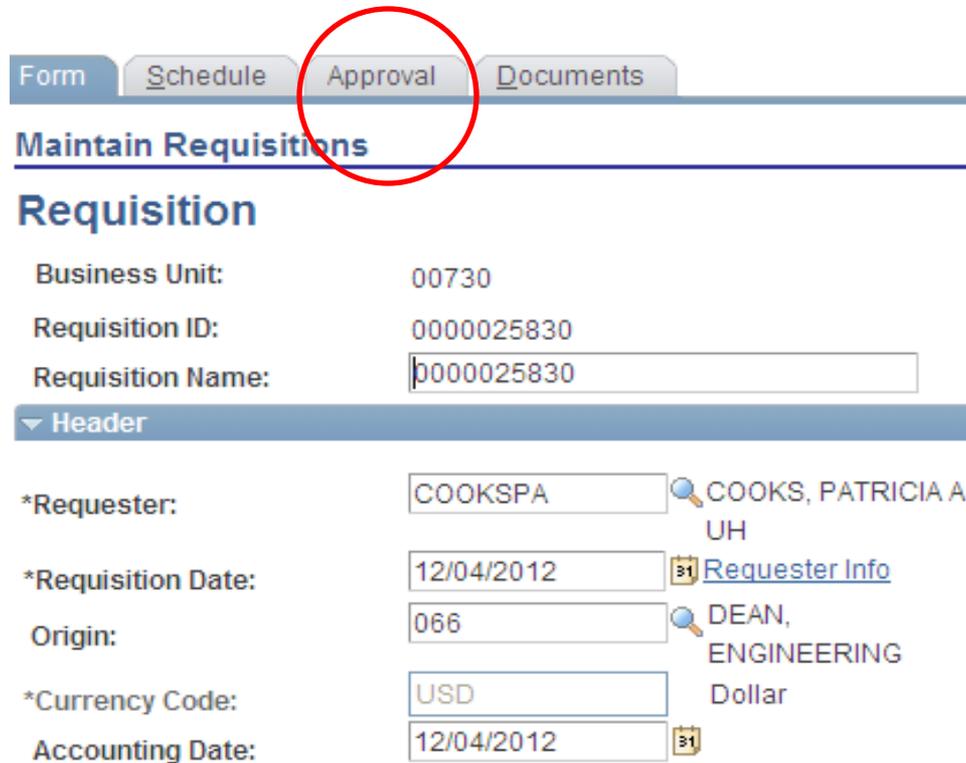
Display Active Documents Only [Add New Document](#)

Scroll Area [Find](#) | [View All](#) First 1 of 1 Last

	<input type="checkbox"/> Security Flag Details...
Active Status	Active ▼
Sequence Nbr	1
Created By	0099758 Webster, Berenice D.
Create Date/Time	11/05/2012 5:25:30PM
Last Update User ID	
Last Update Date/Time	

ENTERING THE REQUISITION INTO WORKFLOW

Step 1: Click on the “Approval” tab.



The screenshot shows a web interface for managing requisitions. At the top, there are four tabs: "Form", "Schedule", "Approval", and "Documents". The "Approval" tab is highlighted with a red circle. Below the tabs is a header section titled "Maintain Requisitions" and "Requisition". The main content area displays the following information:

Business Unit:	00730
Requisition ID:	0000025830
Requisition Name:	<input type="text" value="0000025830"/>

Below this is a section titled "Header" with a dropdown arrow. It contains the following fields:

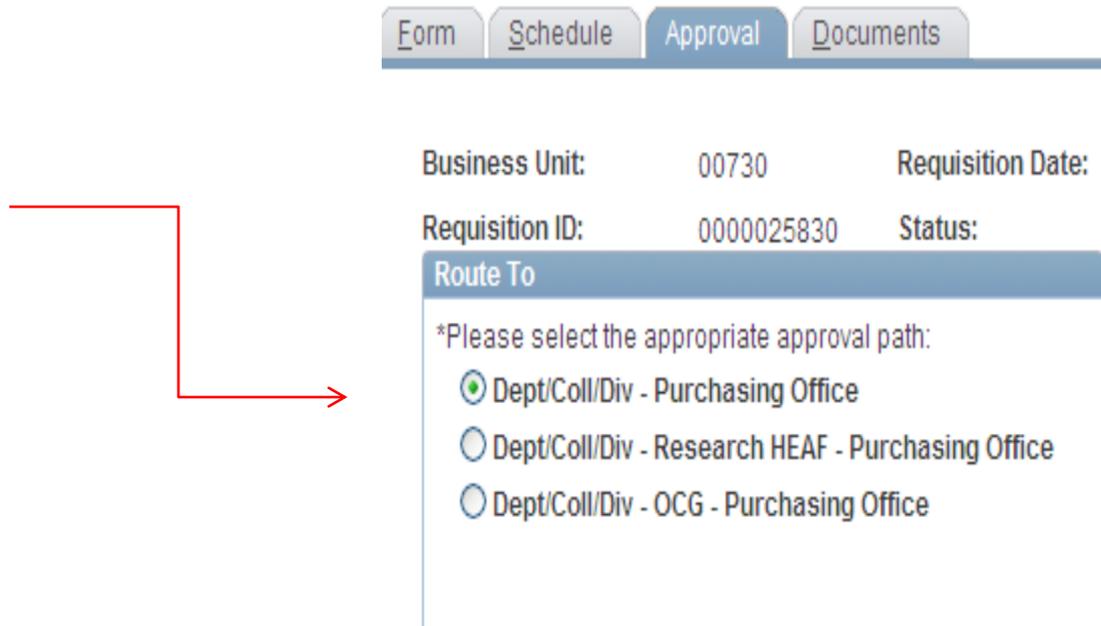
*Requester:	<input type="text" value="COOKSPA"/>  COOKS, PATRICIA A - UH
*Requisition Date:	<input type="text" value="12/04/2012"/>  Requester Info
Origin:	<input type="text" value="066"/>  DEAN, ENGINEERING
*Currency Code:	<input type="text" value="USD"/> Dollar
Accounting Date:	<input type="text" value="12/04/2012"/> 

Step 2: Choose a "Route To" Approval Path. The descriptions of the paths are as follows:

DEPT/COLL/DIV – Purchasing Office

DEPT/COLL/DIV/RESEARCH HEAF-Purchasing Office

DEPT/COLL/DIV/OCG-Purchasing Office



The screenshot shows a software interface with four tabs: Form, Schedule, Approval, and Documents. The 'Approval' tab is active. Below the tabs, there are fields for Business Unit (00730), Requisition Date, Requisition ID (0000025830), and Status. A dropdown menu titled 'Route To' is open, displaying three options with radio buttons. A red arrow points to the first option, 'Dept/Coll/Div - Purchasing Office'.

Business Unit:	00730	Requisition Date:
Requisition ID:	0000025830	Status:

Route To

*Please select the appropriate approval path:

- Dept/Coll/Div - Purchasing Office
- Dept/Coll/Div - Research HEAF - Purchasing Office
- Dept/Coll/Div - OCG - Purchasing Office

Step 3: Change the Source **only** if the Requisition is to be redirected to another area for approval (using another department's cost center). If the Requisition is not being redirected, allow the default.

For training purposes, let the Source default to Purchasing.

Business Unit:	00730	Requisition Date:	12/04/2012
Requisition ID:	0000025830	Status:	Open

Route To

*Please select the appropriate approval path:

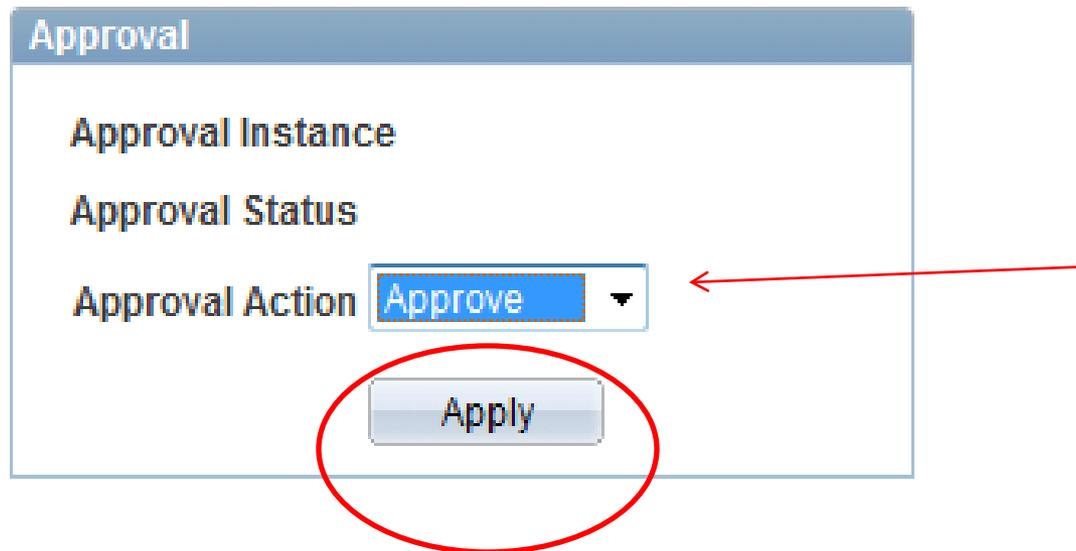
- Dept/Coll/Div - Purchasing Office
- Dept/Coll/Div - Research HEAF - Purchasing Office
- Dept/Coll/Div - OCG - Purchasing Office

Source

Department H0175

Source PUR - Purchasing 

Step 4: Choose "Approve" for the Approval Action from the drop down box and click "apply" to process the workflow action.



The image shows a dialog box titled "Approval". It contains three fields: "Approval Instance", "Approval Status", and "Approval Action". The "Approval Action" field is a dropdown menu with "Approve" selected. A red arrow points to the dropdown menu. Below the "Approval Action" field is a button labeled "Apply", which is circled in red.

The comment log and approval history will document the approval status.

Business Unit 00730	Approval Status Approved
Requisition ID 0000025830	Approval Action <input type="button" value="Approve"/>
OperID 1069484	<input type="button" value="Apply"/>

Comment Log

12-04-12 11:12 AM : Dept/Coll/Div - Purchasing Office : Approve : Burton,Christopher E.

Add Comment

Approval History				
Step	Status	Date/Time Stamp	User ID	Name
	Initiated	12/04/12 11:12:49AM	1069484	Burton,Christopher E
Step 1	Skipped	12/04/12 11:12:49AM		
Step 2	Approved	12/04/12 11:12:49AM	1069484	Burton,Christopher E

Step 5: Click “OK” and the Requisition will be entered into workflow or will move to the next person along the workflow path.

The requisition has been sent in workflow to the next level of approval.

Business Unit:	00730	Requisition Date:	12/04/2012
Requisition ID:	0000025830	Status:	Approved

Route To

*Please select the appropriate approval path:

- Dept/Coll/Div - Purchasing Office
- Dept/Coll/Div - Research HEAF - Purchasing Office
- Dept/Coll/Div - OCG - Purchasing Office

Source

Department H0175

Source

Workflow Fields

Business Unit 00730

Requisition ID 0000025830

OperID 1069484

Approval

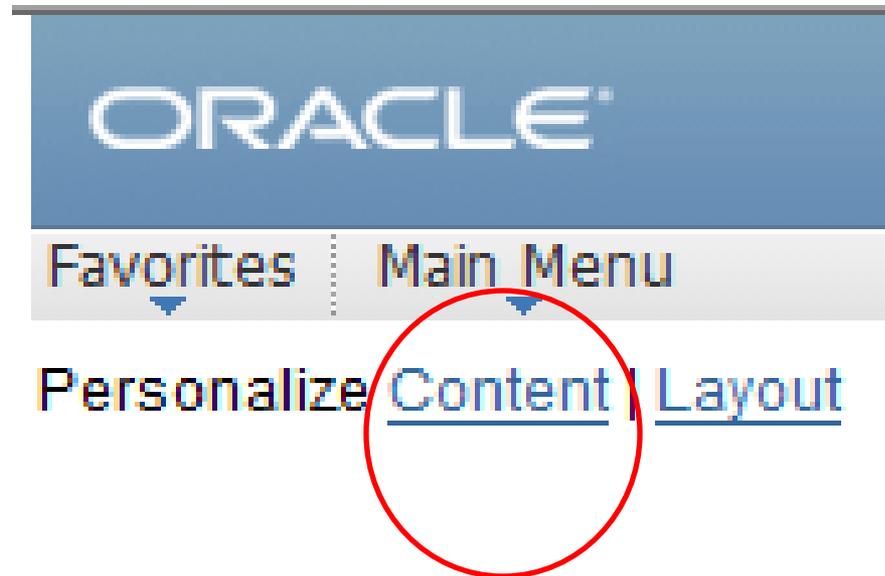
Approval Instance 2126240

Approval Status Approved

Approval Action

HOW TO PLACE THE WORKLIST ON THE HOME PAGE

Step 1: Click the “content” hyperlink on the Home Page.
The Personalize Content page is displayed.



Step 2: Click the Requisition Worklist checkbox and “save” .

Personalize Content

Welcome Message:

Choose Pagelets:

Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets:

Go to [Personalize Layout](#)

PeopleSoft Applications

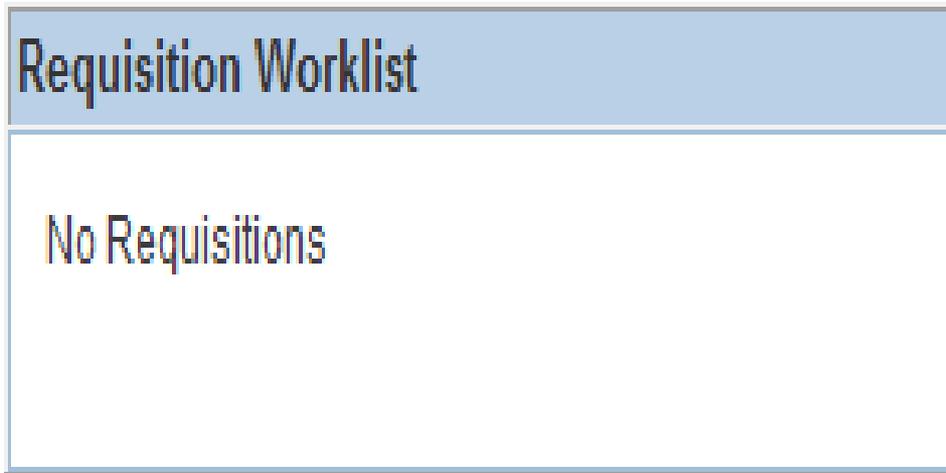
- [XML Publisher](#)
- [Menu](#)
- [Menu - Classic](#)
- [Top Menu Features Description](#)
- [My Reports](#)
- [Main Menu](#)

Financials

- [Payable worklist](#)
- [Journal Worklist](#)
- [Requisition Worklist](#)

[Return to Home](#)

The Requisition Worklist is displayed on the Home Page:



For further assistance, contact your purchaser

- Samuel Arevalo: 713-743-8606,
wsarevalo@central.uh.edu
- Christopher Burton: 713-743-5671,
ceburton@central.uh.edu
- Tony Carpenter: 713-743-5656,
abccarpenter@central.uh.edu

- We are here to help YOU. Thank you!