

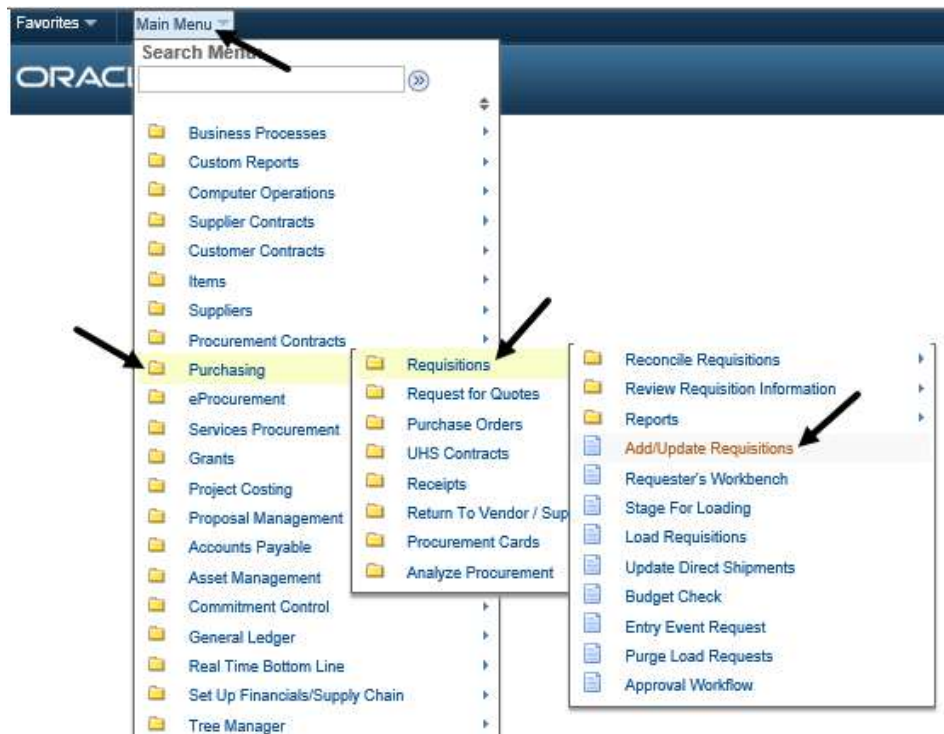
Requisition Entry in UHS Finance

Please have the following information before beginning:

- Valid Quote
- Supplier ID number (*ensure the correct supplier address is available*)
- Account and Cost Center information. (Fund, Department, Program, Budget Ref., and Project)

1. Log into UHS Finance then follow the path:

Main Menu → Purchasing → Requisitions → Add/Update Requisitions

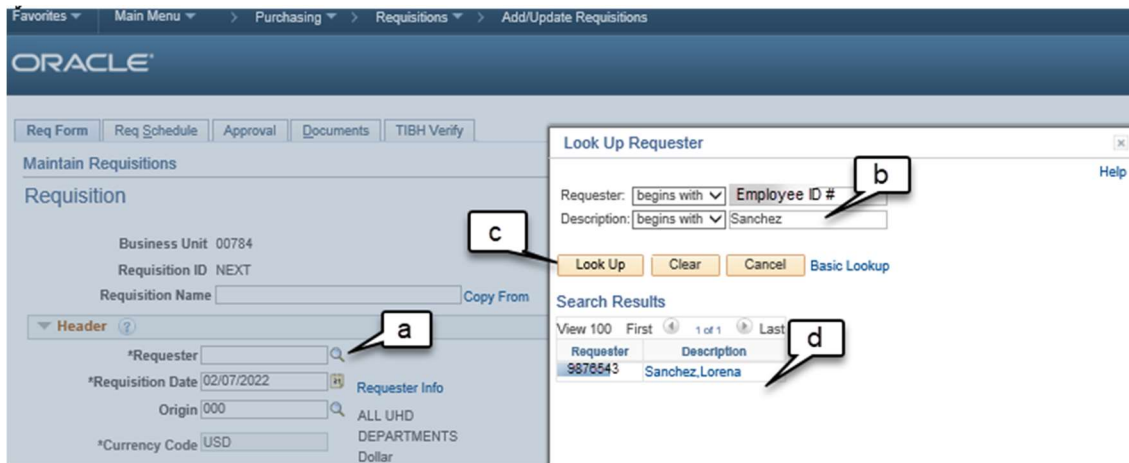


2. Click the search symbol to select the appropriate Business Unit: **CN784** for UHS and UHS contracts, or **00784** for Cooperative Contracts and non-contract requisitions, then click **Add**

A screenshot of the Oracle Requisitions entry form. The breadcrumb trail at the top reads 'Main Menu > Purchasing > Requisitions > Add/Update Requisitions'. Below the breadcrumb is the Oracle logo. The page title is 'Requisitions'. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a 'Business Unit' field with the value '00784' and a search icon. Below that is a 'Requisition ID' field with the value 'NEXT'. At the bottom left is an 'Add' button. Arrows point to the search icon in the Business Unit field and the 'Add' button. At the bottom of the page are the links 'Find an Existing Value | Add a New Value'.

3. Enter the Requester:

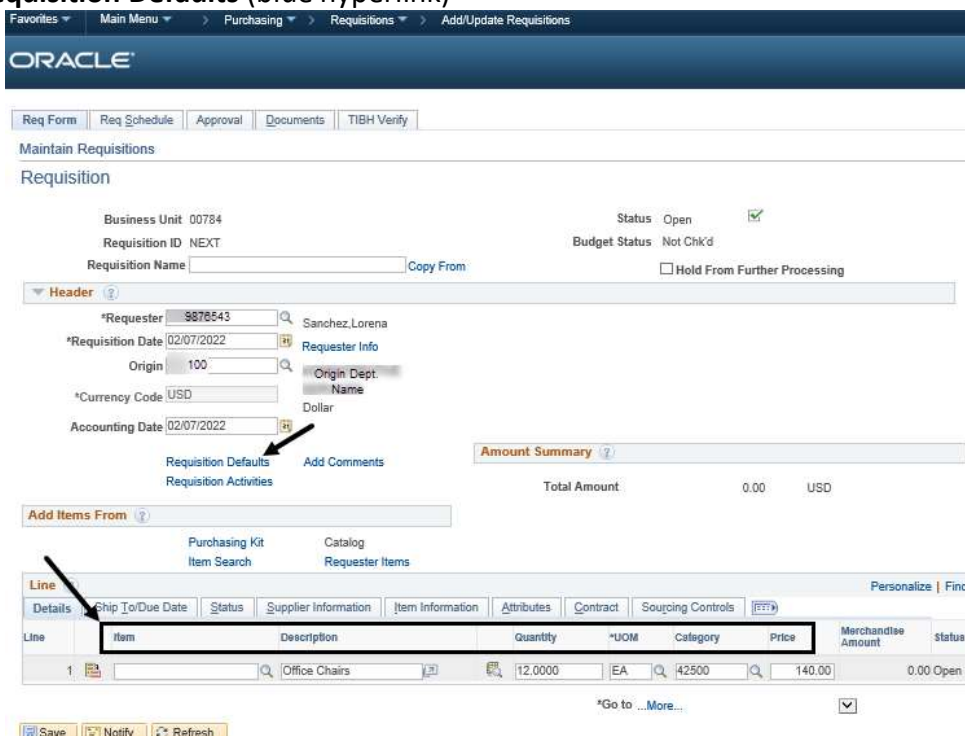
- Click the **search symbol** to search for Requester.
- You may search two ways. First by keying in employee ID number under **Requester** or by keying in the last name under **Description** (*ensure the correct name is entered*)
- Click **Look up**
- Select the appropriate name



4. Key in the following information under line one:

- Description** of the item/service
- Quantity**, either tab over or click on “quantity”
- Unit of Measure (UOM)**, click on the search symbol and choose the appropriate unit of measure.
- Category**, click on the search symbol, key in the description of the item being purchased and choose the appropriate category.

5. Next click on **Requisition Defaults** (blue hyperlink)



6. Requisition Defaults Page:

- a) Choose the correct buyer; either enter the last name or click on the spyglass to search the buyer's information.

Buyer based on the dollar amount:

- i. Below - \$24,999 = Michael Vernon
- ii. \$25,000 and above = Evelyn Paige

- b) Select the correct supplier, either enter the supplier's name or click on the spyglass. (*Please ensure the correct supplier is selected*).

- c) Select Due Date of Items to be delivered or services to be provided

- d) Key in **Account** and **Cost Center Information** under line one. (If more than one account and/or cost center, please contact the Purchasing Dept.)

Click **OK**.

Requisition Defaults

Business Unit 00784

Requisition Date 02/07/2022

Requisition ID NEXT

Status Open

Default Options ?

- Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.
- Override If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer

Supplier

Category

Schedule

Ship To *Distribute By

Due Date

Ultimate Use Code

Attention To

One Time Address

Distribution

SpeedChart

Distributions

Dist	Percent	GL Unit	Entry Event	Account	Fund	Dept	Program	PC Bus Unit	Project
1		00784		54381	2022	D100	A1234	00784	NA

OK

Cancel

Refresh

7. Select **Mark All** (make sure all boxes are checked) and click **OK** (this will navigate back to form tab)

Retrofit field changes to "all" existing requisition lines/schedules/distributions.....

Business Unit 00784

Requisition Date 02/21/2022

Requisition ID NEXT

Status Open

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.

For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.

Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition.

Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.

Mark All **Unmark All**

Retrofit Field Selection Personalize | Find | View All | First 1-7 of 17 Last

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input checked="" type="checkbox"/>		Buyer	12345678	
<input checked="" type="checkbox"/>		Supplier	00000012345	
<input checked="" type="checkbox"/>		Supplier Location	V	
<input checked="" type="checkbox"/>		Ship To	D0116	
<input checked="" type="checkbox"/>		Due Date	2022-03-21	
<input checked="" type="checkbox"/>	1	Pct	100	
<input checked="" type="checkbox"/>	1	GL Unit	00784	<input type="checkbox"/>

OK Cancel Refresh

8. Click **Add Comments** (blue hyperlink)

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

ORACLE

Req Form Req Schedule Approval Documents TIBH Verify

Maintain Requisitions

Requisition

Business Unit 00784 Status Open
 Requisition ID NEXT Budget Status Not Chk'd
 Requisition Name _____ Copy From Hold From Further Processing

Header

*Requester 8876543 Sanchez, Lorena
 *Requisition Date 02/07/2022 Requester Info
 Origin 100 Origin Dept. Name
 *Currency Code USD Dollar
 Accounting Date 02/07/2022

Requisition Defaults **Add Comments**
 Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From Purchasing Kit Catalog
 Item Search Requester Items

Line Personalize | Find |

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Office Chairs	12.0000	EA	42500	140.00	0.00	Open

*Go to ...More...

Save Notify Refresh

9. Key in the following information:

- a) Purpose/Benefit statement
- b) Select the **Send to Supplier** box
- c) Click **OK** (this will navigate back to the form tab)

Header Comments

Business Unit 00784 Requisition Date 02/07/2022
Requisition ID NEXT Status Open

*Sort Method *Sort Sequence

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active +

Purpose/Benefit:

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Email

From ->

10. Click **Save**. PeopleSoft will now assign a **Requisition ID** number

Req Form | Req Schedule | Approval | Documents | TIBH Verify

Maintain Requisitions

Requisition

Business Unit 00784 Status Approved
Requisition ID 0000091298 Budget Status Valid
Requisition Name 0000091298 Hold From Further Processing

Header

*Requester 9876543 Lorena Sanchez
*Requisition Date 09/01/2021 Requester Info
Origin #100 Origin Dept. Name
Currency Code USD Dollar
Accounting Date 09/01/2021

Requisition Defaults Edit Comments
Requisition Activities
Document Status

Amount Summary

Total Amount	1,880.00	USD
Pre-Encumbrance	0.00	USD
Balance		

Add Items From Purchasing Kit Catalog Search for Lines
Item Search Requester Items Line To

Line Personalize | Find

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount
1		Fujitsu fi-7160 - Document scanner - Dual CCD - Duplex - 216 x 355.6 mm - 600 dpi x 600 dpi - up to 60 ppm (mono) / up to 60 ppm (color) - ADF (80 sheets) - up to 4000 scans per day - USB 3.0	2.0000	EA	20683	940.00000	1,880.0

 *Go to ...More...

11. Ensure the requisition has all the necessary information by viewing the Requisition Coversheet

- a) Click on the **Documents tab**
- b) Click **Print Requisition Coversheet** (review the information entered)

The screenshot shows the Oracle Requisition system interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'My Homepage', and 'Add/Update Requisitions'. Below this is the Oracle logo. A callout box labeled 'a' points to the 'Documents' tab in the navigation menu. Below the tabs, there is a form with the following fields: 'Business Unit' (00784), 'Requisition Date' (02/07/2022), 'Requisition ID' (0000091298), and 'Status' (Open). A callout box labeled 'b' points to the 'Print Requisition Coversheet' button. Below the form, there is a section titled 'Requisitions Document Images' with a checkbox for 'Display Active Documents Only' and an 'Add New Document' button.

c) The requisition **should** contain the following information:

- Department name
- Requestor information
- Supplier ID
- Supplier name
- Amount of your requisition
- Account
- Cost center information
- Description
- Purpose and benefit statement

12. If requisition information is correct, proceed to Budget check the requisition by returning to the Form tab.

- a) Click the budget check icon. (Valid budget check is required to continue).
- b) Make sure Budget Status is Valid. If a budget error is received, please contact the Budget office for assistance.

Req Form | Req Schedule | Approval | Documents | TIBH Verify

Maintain Requisitions

Requisition

Business Unit 00784 Status Open

Requisition ID 0000091298 Budget Status Not Chk'd

Requisition Name 0000091298 Hold From Further Processing

▼ Header ?

*Requester 9876543 REQUESTER

*Requisition Date 01/25/2022 Requester Info

Origin 100 Origin Dept. Name

*Currency Code USD Dollar

Accounting Date 01/25/2022

Requisition Defaults Add Comments

Requisition Activities

Document Status

Amount Summary ?

Total Amount	4,862.28	USD
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Req Form | Req Schedule | Approval | Documents | TIBH Verify

Maintain Requisitions

Requisition

Business Unit 00784 Status Open

Requisition ID 000091298 Budget Status Valid

Requisition Name 0000091298 Hold From Further Processing

13. Next upload all necessary information:

- a) Click on the **Documents tab**
- b) Click **Add New Document**, browse and select the file.
- c) The **file icon** should be visible (ensure the correct file was uploaded)

Req Form | Req Schedule | Approval | Documents | TIBH Verify

Business Unit 00784 Requisition Date 02/07/2022

Requisition ID 0000091298 Status Open

[Print Requisition Coversheet](#)

Requisitions Document Images

Display Active Documents Only Add New Document

Scroll Area Find | View All First 1 of 1 Last

Security Flag Details

Active Status Active

Sequence Nbr 1

Created By 9876543 Your Name Here

Create Date/Time 02/08/2022 7:43:20AM

Last Update User ID 9876543 Your Name Here

Last Update Date/Time 02/08/2022 7:43:20AM

Rendition Type PDF

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Req Form | Req Schedule | Approval | Documents | TIBH Verify

14. Send the requisition through workflow:

- a) Click the **Approval** tab
- b) Choose the appropriate path (*source will be selected*)
- c) Click **Approve**
- d) Click **Apply**

Req Form | Req Schedule | **Approval** | Documents | TIBH Verify

Business Unit 00784 Requisition Date 01/25/2022
 Requisition ID 0000091298 Status Open

Route To
 *Please select the appropriate approval path:
 Dept/Coll/Div - Purchasing Office
 Dept/Coll/Div - OCG - Purchasing Office
 Dept/Coll/Div - Provost - Purchasing Office
 Dept/Coll/Div - Contracts - Purchasing Office
 Dept/Coll/Div - EHS - Purchasing Office

Source
 Department D 100
 Source Gator Enrollment

Approval
 Approval Instance
 Approval Status
 Approval Action **Approve**
 Apply

Workflow Fields
 Business Unit 00784
 Requisition ID 0000091298
 OperID 9876543

e) Once you Submitted for Approval, you completed the Requisition as seen below.

Req Form | Req Schedule | **Approval** | Documents | TIBH Verify

Business Unit 00784 Requisition Date 02/15/2022
 Requisition ID 0000091298 Status Open

Route To
 *Please select the appropriate approval path:
 Dept/Coll/Div - Purchasing Office
 Dept/Coll/Div - OCG - Purchasing Office
 Dept/Coll/Div - Provost - Purchasing Office
 Dept/Coll/Div - Contracts - Purchasing Office
 Dept/Coll/Div - EHS - Purchasing Office

Source
 Department D 100
 Source Gator Enrollment

Approval
 Approval Instance 3883819
 Approval Status Pending
 Approval Action
 Apply

Comment Log
 02-21-22 03:39 PM : Dept/Coll/Div - Purchasing Office : Approve - Your Name Here

Add Comment

Approval History

Step	Status	Date/Time Stamp	User ID	Name
	Initiated	02/21/22 3:39:52PM	9876543	Your Name Here
Step 1	Pending	02/21/22 3:39:52PM		
Step 2	Pending	02/21/22 3:39:52PM		

NOTE: Purchasing has a 48-hour turnaround time to process the requisition.
 For questions or assistance, please contact the Purchasing Department.