

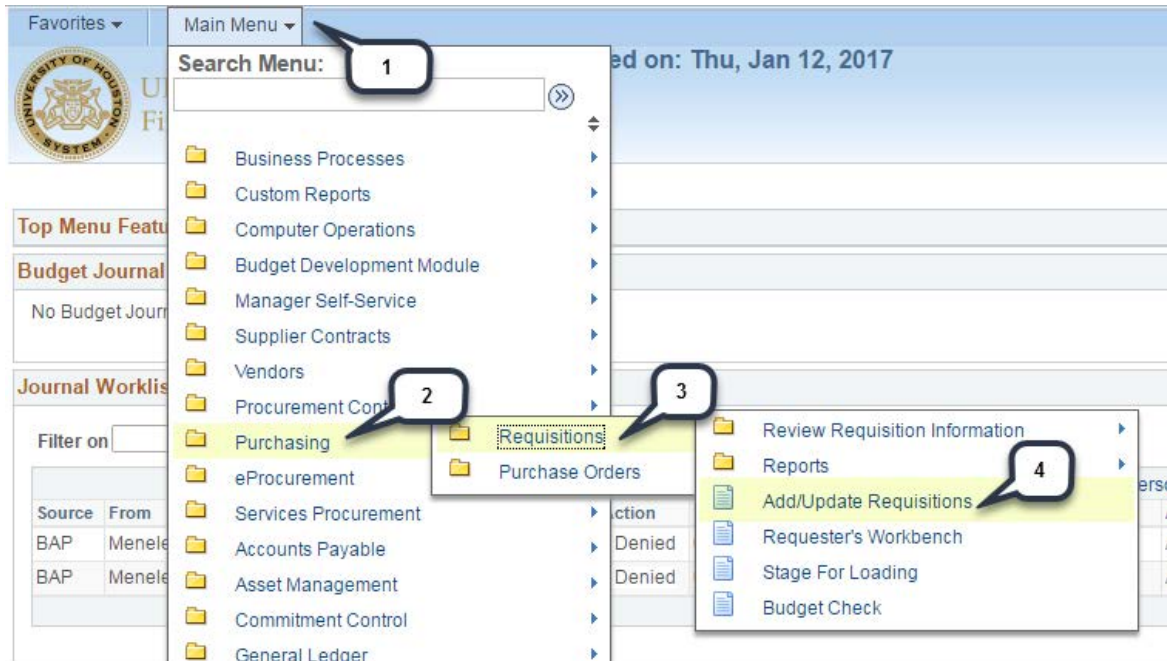
Requisition Entry in UHS Finance

Please have the following information before beginning:

1. Quote
2. Vendor ID number (*ensure the correct vendor address is selected*)
3. Account and the cost center information. (Fund, Department, Program, Budget Ref., and Project)

Log into UHS Finance then follow the path:

Main Menu → Purchasing → Requisitions → Add/Update Requisitions



Next click **Add**



Enter the Requester:

1. Click the **spy glass** to search for Requester. (The person asking for the items/services to be purchased.)
2. You may search two ways. First by keying in employee ID number under **Requester** or by keying in the last name under **Description** (please double check to ensure the correct name is entered).
3. Click **Look up**
4. Select the appropriate name

The screenshot shows the 'Add/Update Requisitions' page in the UHS Finance system. A 'Look Up Requester' dialog box is open, showing search criteria: 'Requester: begins with 0086989' and 'Description: begins with sanchez'. The 'Look Up' button is highlighted. Below the dialog, a search results table shows one result: 'Requester: 0086989, Description: Sanchez,Lorena'. The main page shows a requisition form with fields for Business Unit (00784), Requisition ID (NEXT), and Requisition Name. The 'Requester' field is currently empty, with a callout pointing to the search icon next to it.

1. 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 spy glass and choose the appropriate unit of measure.
 - **Category**, click on the spy glass, key in the description of the item being purchased and choose the appropriate category.
2. Next click on **Requisition Defaults** (blue hyperlink)

The screenshot shows the 'Add/Update Requisitions' page with the requisition details and line items. The 'Requester' field is now populated with '0086989' and 'Sanchez,Lorena'. The 'Requisition Defaults' link is highlighted. The line item table shows one line item: 'Office Chairs' with a quantity of 12,000, UOM of EA, and a price of 140.00. The 'Requisition Defaults' link is highlighted in blue.

Requisition Defaults Page:

1. 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:

Below - \$24,999 = **Evelyn Paige**

\$25,000 and above = **Lorena Sanchez**

2. Select the correct vendor, either enter the vendor's name or click on the spyglass. (*Please ensure the correct vendor is selected*).
3. Select Due Date of Items to be delivered.
4. Key in **Account** and **Cost Center Information** under line one. (If you have more than one Call Center info please contact purchasing dept.)
5. Click **OK**.

Maintain Requisitions

Requisition Defaults

Business Unit: 00784 Requisition Date: 05/11/2017
Requisition ID: 0000017143 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: 0086989 Sanchez, Lorena
Vendor: 000009330 CHALLENGE OFFICE PRODUCTS INC
Category: Vendor Location: V
Vendor Lookup

Schedule

Ship To: D0116 RECEIVING *Distribute By: Amount
Due Date: 06/26/2017
Ultimate Use Code:
Attention To: One Time Address

Distribution

SpeedChart:

Distributions

Details Asset Information

Dist	Ent	GL Unit	Entry Event	Account	Fund	Dept	Program	Bud Ref	PC Bus Unit	Project
1		100.0000 00784		58803	2064	D0042	F0398	BP2017	00784	NA

OK Cancel Refresh

1. Select **Mark all** (Make sure all boxes are marked with a check)
2. Next click **OK** (this will navigate back to form tab)

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

Business Unit: 00784 Requisition Date: 05/11/2017
 Requisition ID: 1 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 Distributions' to apply changes to all distribution lines on the requisition.

Mark All Unmark All

Apply	Distrib Line	Field Name	Field Value	Apply to All Distributions
<input checked="" type="checkbox"/>		Buyer	0086989	
<input checked="" type="checkbox"/>		Vendor	0000009330	
<input checked="" type="checkbox"/>		Vendor Location	V	
<input checked="" type="checkbox"/>		Ship To	D0116	
<input checked="" type="checkbox"/>	1	Pct	100	
<input checked="" type="checkbox"/>	1	GL Unit	00784	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Account	54362	<input type="checkbox"/>

OK Cancel Refresh

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

Form 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: 0086989 Sanchez, Lorena Requisition Defaults **1**
 *Requisition Date: 05/11/2017 Add Comments
 Origin: 040 ADMINISTRATIVE Requisition Activities
 SERVICES **Amount Summary**
 *Currency Code: USD Dollar Total Amount: 1,680.00 USD
 Accounting Date: 05/11/2017

Add Items From

Purchasing Kit Catalog
 Item Search Requester Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Office Chairs	12.0000	EA	42500	140.00000	1,680.00	Open

Key in the following information:

1. Purpose/Benefit.
2. Select the **Send to Vendor** box
3. Click **OK** (this will navigate back to the form tab)

Header Comments

Business Unit: 00784 Requisition Date: 05/11/2017
Requisition ID: NEXT 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 +

Purpose/Benefit: **1**

2

Send to Vendor Show at Receipt
 Show at Voucher

Associated Document

Attachment: **3** Attach View Delete Email

From -> REQ 00784-NEXT

OK Cancel Refresh

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

Form Schedule Approval Documents TIBH Verify

Maintain Requisitions

Requisition

Business Unit: 00784 Status: Open
Requisition ID: 0000017143 Budget Status: Not Chk'd
Requisition Name: 0000017143 Hold From Further Processing

Header

*Requester: 0086989 Sanchez, Lorena Requisition Defaults
*Requisition Date: 05/11/2017 Requester Info Edit Comments
Origin: 040 ADMINISTRATIVE SERVICES Requisition Activities
*Currency Code: USD Dollar **Amount Summary**
Accounting Date: 03/31/2017 Total Amount: 1,680.00 USD

Add Items From

Purchasing Kit Catalog
Item Search Requester Items

Line Personalize | Find | View All |

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Office Chairs	12.0000	EA	42500	140.00000	1,680.00	Open

*Go to: ...More...

Save Notify Refresh

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

1. Click on the Documents tab
2. Click **Print Requisition Coversheet** (To Review input information)

The screenshot shows the UHS Finance system interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Purchasing', 'Requisitions', and 'Add/Update Requisitions'. Below this is the UHS Finance logo. A tabbed interface shows 'Form', 'Schedule', 'Approval', 'Documents', and 'TIBH Verify'. The 'Documents' tab is active. Below the tabs, there is a form with the following fields: Business Unit: 00784, Requisition Date: 05/11/2017, Requisition ID: 0000017143, Status: Open, and a checkbox for 'Include Approval History'. A link 'Print Requisition Coversheet' is visible. Below the form is a section titled 'Requisitions Document' with a checkbox for 'Display Active Documents Only' and an 'Add New Document' button. Two callout boxes with numbers '1' and '2' point to the 'Print Requisition Coversheet' link and the 'Add New Document' button, respectively.

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

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

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

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

Maintain Requisitions

Requisition

Business Unit: 00784
 Requisition ID: 0000017143
 Requisition Name: 0000017143

Status: Open
 Budget Status: Not Chk'd
 Hold From Further Processing



Header

*Requester: 0086989 Sanchez, Lorena
 *Requisition Date: 05/11/2017 Requester Info
 Origin: 040 ADMINISTRATIVE SERVICES
 *Currency Code: USD Dollar
 Accounting Date: 03/31/2017

Requisition Defaults
 Edit Comments
 Requisition Activities

Amount Summary

Total Amount: 1,680.00 USD

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Maintain Requisitions

Requisition

Business Unit: 00784
 Requisition ID: 0000017143
 Requisition Name: 0000017143

Status: Open
 Budget Status: Valid
 Hold From Further Processing



Next upload all necessary information:

1. Click on the **Documents**
2. Click **Add New Document**, browse and select the file.
3. The **file icon** should be visible. Open the file to check the correct information is attached.

Form Schedule Approval **Documents** TIBH Verify

Business Unit: 00784 Requisition Date: 05/11/2017
 Requisition ID: 0000017143 Status: Open
 Include Approval History

Print Requisition Coversheet

Requisitions Document Images

Display Active Documents Only

Scroll Area Find | View All First 1 of 1 Last

Security Flag

Active Status: Active

Sequence Nbr: 1

Created By: 1031933 Ibarra Jr, Juan

Create Date/Time: 05/11/2017 11:00:28AM

Last Update User ID

Last Update Date/Time

Rendition Type

Save Return to Search Notify Refresh Add Update/Display



Send the requisition through workflow:

1. Click the **Approval** tab
2. Choose the appropriate path (*source will be selected*)
3. Click **Approve**
4. Click **Apply**

The screenshot shows the 'Approval' tab of a requisition form. Callout 1 points to the 'Approval' tab. Callout 2 points to the 'Route To' section, which contains a list of approval paths: 'Dept/Coll/Div - Purchasing Office' (selected), 'Dept/Coll/Div - OCG - Purchasing Office', 'Dept/Coll/Div - Provost - Purchasing Office', and 'Dep/Coll/Div - Contracts - Purchasing Office'. Callout 3 points to the 'Approval Action' dropdown menu, which is set to 'Approve'. Callout 4 points to the 'Apply' button.

Business Unit: 00784 Requisition Date: 05/11/2017
Requisition ID: 0000017143 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
 Dep/Coll/Div - Contracts - Purchasing Office

Source
Department D0041
Source BAP - Budget & Purchasing

Workflow Fields
Business Unit 00784
Requisition ID 0000017143
OperID 1031933

Approval
Approval Instance
Approval Status
Approval Action Approve
Apply

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

The screenshot shows the 'Approval' tab of a requisition form after submission. The 'Approval Status' is now 'Pending'. The 'Approval Instance' is 2980648. The 'Approval Action' is still 'Approve'. The 'Apply' button is now disabled. A 'Comment Log' section shows a comment: '05-11-17 11:18 AM : Dept/Coll/Div - Purchasing Office : Approve : Ibarra Jr,Juan'. Below the comment log is an 'Add Comment' field. At the bottom, there is an 'Approval History' table.

Business Unit: 00784 Requisition Date: 05/11/2017
Requisition ID: 0000017143 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
 Dep/Coll/Div - Contracts - Purchasing Office

Source
Department D0041
Source BAP - Budget & Purchasing

Workflow Fields
Business Unit 00784
Requisition ID 0000017143
OperID 1031933

Approval
Approval Instance 2980648
Approval Status Pending
Approval Action Approve
Apply

Comment Log
05-11-17 11:18 AM : Dept/Coll/Div - Purchasing Office : Approve : Ibarra Jr,Juan

Add Comment

Approval History

Step	Status	Date/Time Stamp	User ID	Name
	Initiated	05/11/17 11:18:08AM	1031933	Ibarra Jr,Juan
Step 1	Pending	05/11/17 11:18:08AM		
Step 2	Pending	05/11/17 11:18:08AM		

For questions or comments, please contact the Purchasing Department. Thank you.