

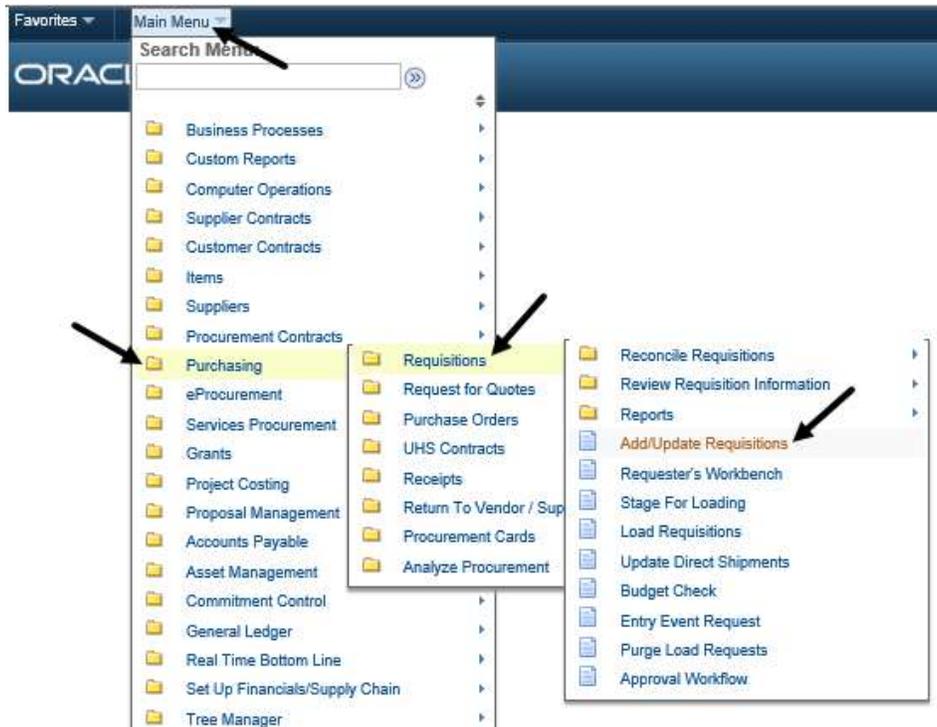
## Requisition Entry in UHS Finance

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**

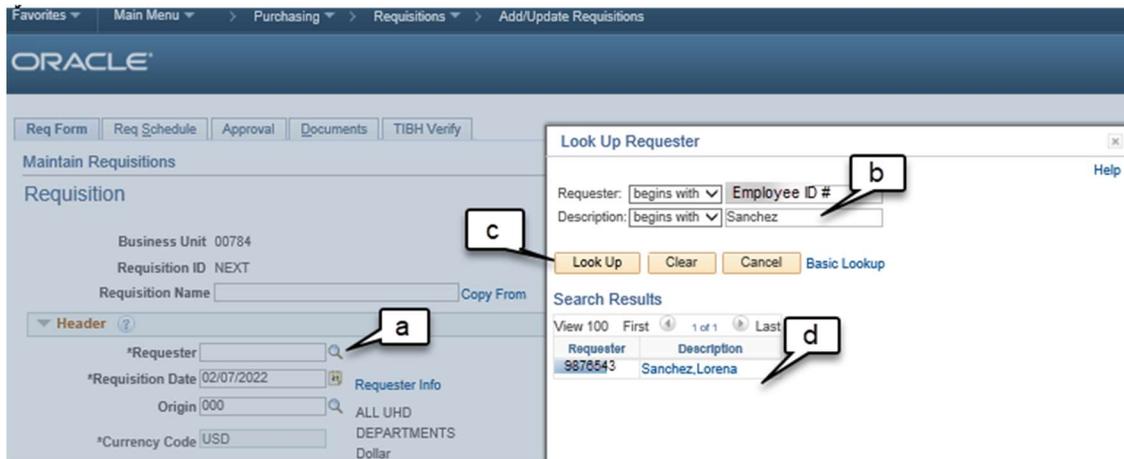


2. Click the search symbol to select the appropriate Business Unit: **CN784** for UHS and UHS contracts, or **00784** for Cooperative Contracts and non-contract requisitions, then click **Add**

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:

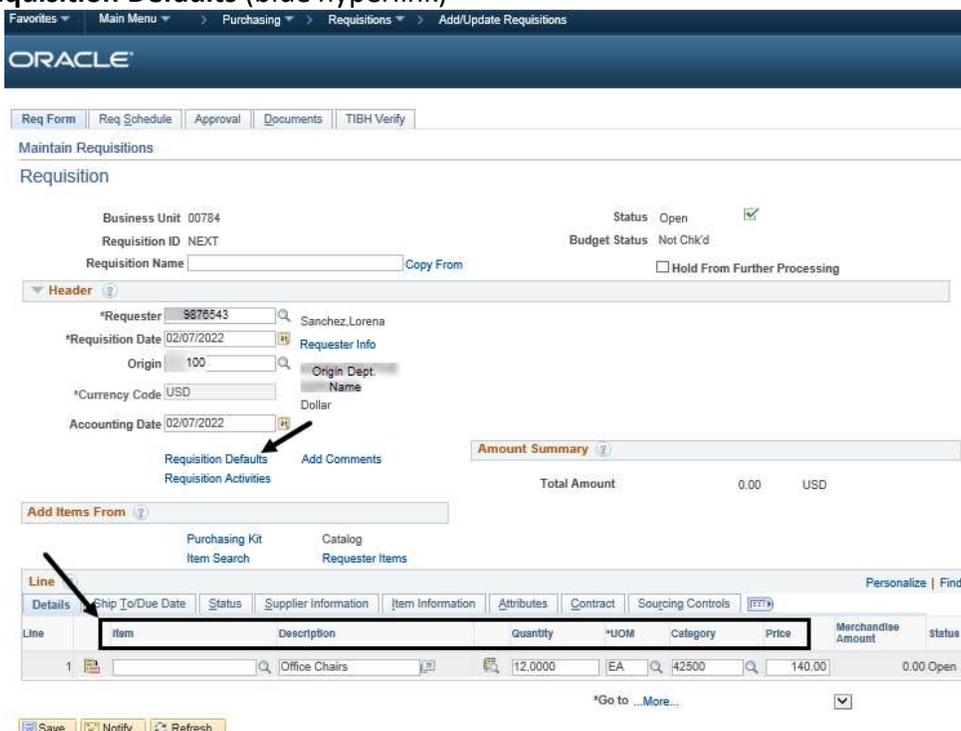
- Click the **search symbol** to search for Requester.
- You may search two ways. First by keying in employee ID number under **Requester** or by keying in the last name under **Description** (*ensure the correct name is entered*)
- Click **Look up**
- Select the appropriate name



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)





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

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls	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 requisition summary section with the following information: 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 this 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.