

REQUISITION ENTRY

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 3



Bowie State University
September 2010

ENTERING A REQUISITION

Overview

The life cycle of a requisition starts with the original entry of a request for products and services. It is then approved based on budgetary allowances.

After approval has been given, the requisition must be Budget Checked to assure there are sufficient funds for the purchase of the item.

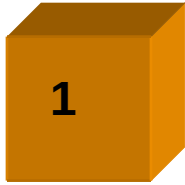
In this chapter we will learn all the necessary steps to Create a new Requisition using PeopleSoft eProcurement.

Objectives

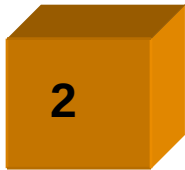
By the end of this chapter, you will be able to:

- Understand the Requisition Process
- Understand the role of the Requester of a Requisition
- Successfully enter a Requisition
- Successfully use the Notify function
- Successfully Add and/or Update/Display Requisitions
- Successfully use the Copy From function to copy a Requisition

Requisition Process



An Originator, someone who cannot enter a requisition, but requires goods and/or services, wishes to order something using the Requisition Process. [See the Appendix for Procedures on when to use the Requisition Process.]



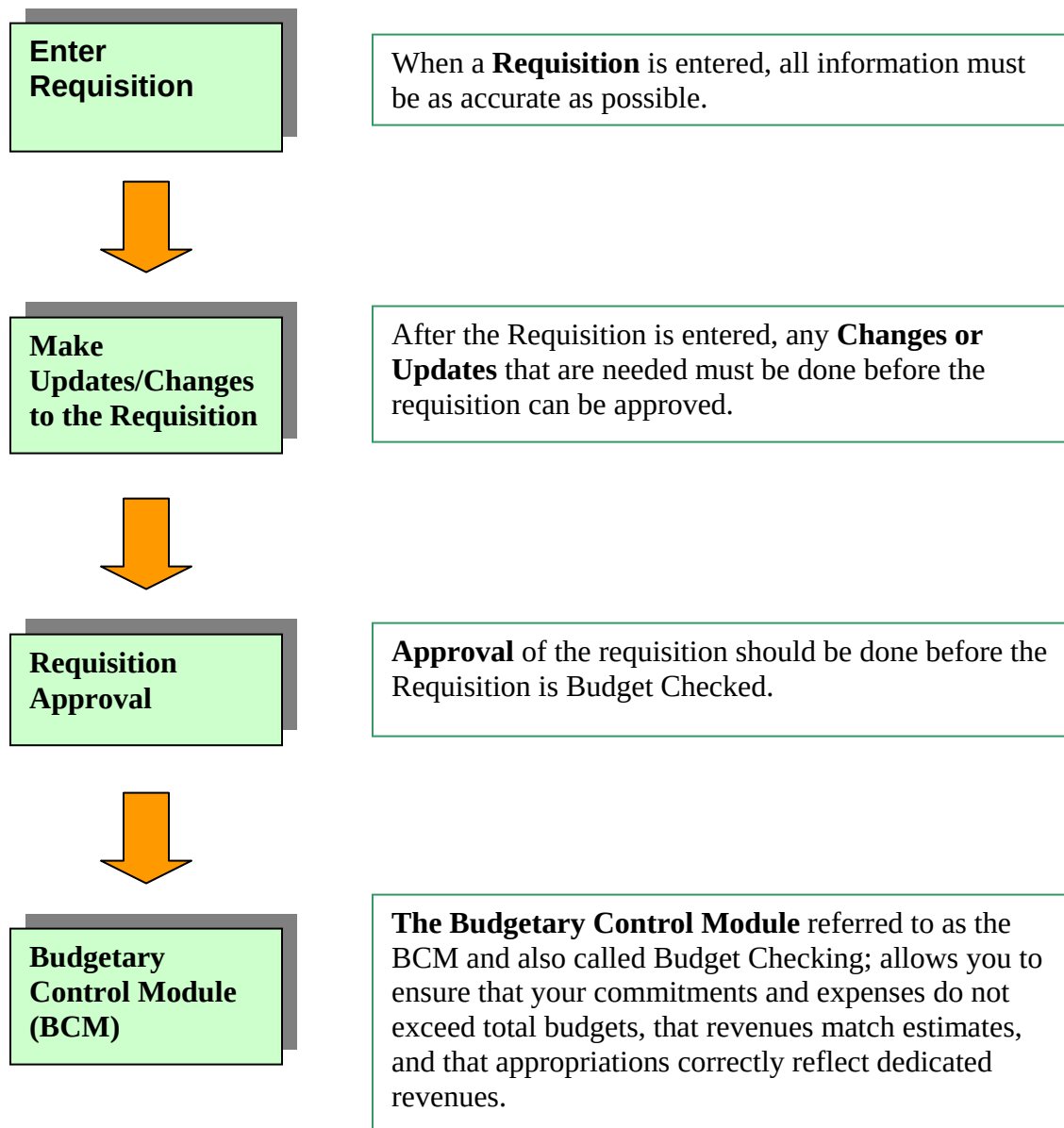
The Originator must submit a request to an Authorized Requester or Authorized Approver for an item that is on the Approved Category Code List. [See the Appendix for a list of all category codes]



All necessary information should be obtained from the Originator at the time of the request including:

- **Price of Item**
- **Vendor**
- **Quantity**
- **Desired delivery date [the date should allow for shipping]**
- **Budget information**
- **Additional notes, comments, or reasons for the purchase**

Role of the Requester of a Requisition



Note: After this point in the cycle, the requisition is sourced to a Purchase Order. We will be concentrating on the **Life Cycle of a Requisition** in this training manual.

Field Descriptions

Before you begin **Requisition Entry**, familiarize yourself with these terms:

<i>Category List</i>	A list of categories describing the items a requestor can order. Your selection should be as accurate as possible and match the item you are purchasing.
<i>Business Unit</i>	The Business Unit will always be BSU (Bowie State University). This value allows Peoplesoft to access the appropriate vendor, purchase order, and receiving information.
<i>Buyer</i>	A representative that orchestrates the purchase of the requested goods and/or services.
<i>ChartField</i>	An element of the accounting code block; the keys by which financial data is recorded in PeopleSoft General Ledger. Individual fields identify the type of information represented within your chart of accounts.
<i>Account</i>	Account represents the natural account to code different categories of revenues, expenditures, assets, liabilities, and fund equity transactions. Account is a required field
<i>Class</i>	Class represents a type of functionally related to revenue or expense accounts. Most of BSU's reporting of revenue is by Class (which is a rollup of accounts).
<i>Department ID</i>	A Department represents a cost center for budgeting purposes. Departments can be rolled up to Programs. Department is a required field.
<i>Fund</i>	Funds separate financial information for the purpose of keeping specific activities and objectives within their limits and regulations. Fund is a required field.
<i>Program</i>	Program represents a group of functionally related departments. A department can only be assigned to one program. Most of BSU's external reporting for expenses is by Program (State, Audited Financial Statements, Maryland Higher Ed Commission, Middle States Accreditation Council). Program is a required field.

Project/Grant

Project/Grant represents segmented cost centers of limited duration. A project can represent an event or an activity that crosses various departments. The Project/Grant field is only required for all transactions coded to Fund 43. It is optional for all other funds.

ChartField Combination Edit

Also called **Combo Edit**. Peoplesoft will check the entries in your distribution line details panel to assure that valid ChartFields have been entered. Peoplesoft will not allow you to enter conflicting information. If you enter information that does not follow the established rules, you will receive a ChartField Combination Edit.

There are three main rules to remember to avoid a ChartField Combination Edit:

- Accounts rollup to Classes.
- Departments rollup to Programs.
- Fund 43 requires a project/grant code.

Item Total

The total number of units being purchased.

Purchase Order

A contractual document issued by an authorized BSU buyer to a vendor that details the terms of the sale under which the buyer will purchase the vendor's goods.

Ship to Location

This is the location where the item ordered is to be delivered. [All deliveries must go to Central Receiving first and can then be re-routed to your campus location]

Entering A New Requisition

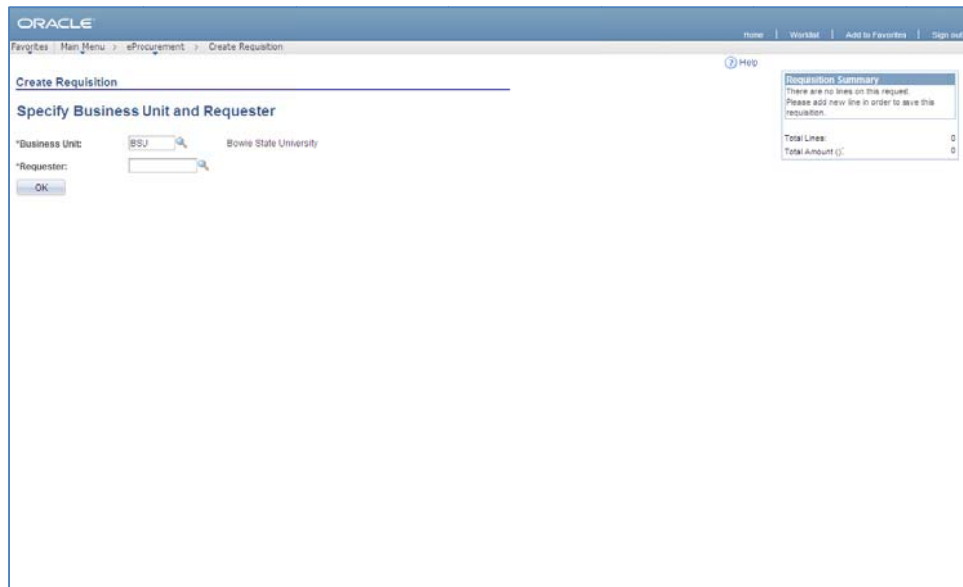
You just received a request from Joe Rogers (Originator) for a new printer. Your task is to enter this request as a requisition in the PeopleSoft system.

You must first obtain the following information:

<i>Detailed Description</i>	CP1160 HP Color Inkjet Printer
<i>Quantity</i>	1
<i>Price</i>	499.00
<i>Vendor</i>	Data Networks
<i>Department ID</i>	The department ID assigned in class.

Navigation

- eProcurement
- Create Requisition
- Business Unit = **BSU**
- Requester = **your ID**
- Click **OK**



Fields that you need to define on this page include the following:

Business Unit

This will be **BSU**, the only business unit used.

Requestor

The ID of the person making the official request.

Note that there is a summary box in the upper right corner that keeps a running total of the number of line and the total amount of the requisition.

Define Requisition

When you click **OK** on the *Create Requisition* search page, the **Define Requisition** page is displayed.

The Create Requisition component shown below consists of several pages. To move to another page, click its hyperlinked tab, or click one of the hyperlinks at the bottom of the page.

Much of the Default Information on the Requisition Form page comes from the Operator Preferences that have been set up for your User ID.

The first page that appears is set up to define the header information. This is information that is common to the entire requisition and not specific to any one line.

Navigation

- eProcurement
- Manage Requisitions
- Business Unit = **BSU**
- Requester = **your ID**
- Click **OK**

Enter the following information:

<i>Business Unit</i>	Defaults from the <i>Create</i> page.
<i>Requestor</i>	Defaults from the <i>Create</i> page.
<i>Requisition Name</i>	An identifier to help identify the requisition in a search list.
<i>Currency</i>	Defaults to USD, the currency used at BSU.
<i>Priority</i>	Indicates the priority of the order. Options are <i>High</i> , <i>Low</i> or <i>Medium</i> . This can be used for reporting or queries.

Once you have entered all the *Requisition Name* you are ready to enter the line information.

Press the **Continue** button at the bottom of the *Define Requisition* page.

Special Request

BSU is only using Special Request ordering. When you press **Continue** on the *Define Requisition* page, this tab will open.

BSU is only using the Special Request tab.

ORACLE eProcurement - 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: [Search]

Catalog Favorites Templates Forms **Special Request**

Select a Request Type

Special Request	Request an item that is not listed in the Catalog
One-time Service	Request a one-time service for a flat fee
Variable Cost Service	Request a service for which the fee is based on the time worked
Time and Materials	Request a service for which the fee is based on the time worked and materials used

Review and Submit

Help

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

Total Lines: 0
Total Amount (USD): 0

Click the **Special Item** hyperlink. The *Special Item* page is displayed.

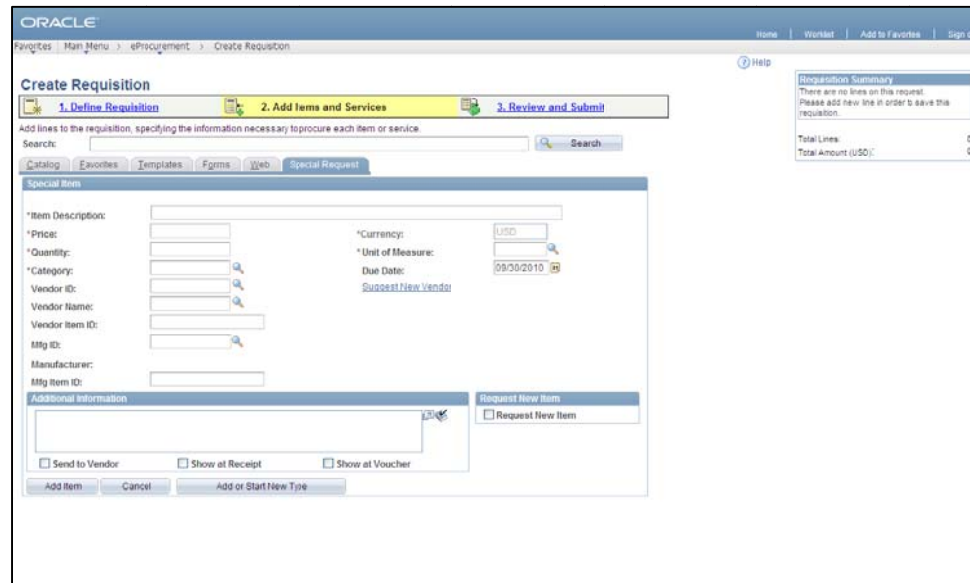
Note: This is the only link you will use.

Special Item

You use the *Special Item* page to enter the specific information about the item(s) you are ordering.

Navigation

- eProcurement
- Create Requisition
- Define Requisitions
- Click **Add Items and Services**
- Click **Special Request** tab
- **Special Item** hyperlink



The following fields are available on the *Special Items* page. Required items are preceded by an asterisk (*).

Item Description

A detailed description of what you are ordering. The long description should be as detailed as possible. PeopleSoft will allow you to cut and paste a description of the item into this field from any word document or web page. The description should contain enough detail for the buyer to complete the purchase. **Insufficient details will delay the processing of the requisition.**

Price

The actual price of the item. If you do not know the price, do not guess – look up the information.

Make sure your prices are accurate. Any discrepancies will affect your budget.

Quantity

Number of this item to be ordered.

<i>Currency</i>	The default is <i>USD</i> and cannot be changed.
<i>Unit of Measure</i>	Item UOM. Determine how many of each item you wish to order.
<i>Category</i>	Defaults from the category selected on the <i>Category Tree</i> on the <i>Definition Requisition</i> page. For more details, see <i>Category Selection</i> in the materials that follow.
<i>Due Date</i>	The date by which the item is needed.
<i>Vendor ID</i>	The ID for the vendor. The Look Up icon accesses the Vendor Search page. For more details, see <i>Vendor Search</i> in the material that follows.
<i>Vendor Name</i>	The Name of the vendor. The Look Up icon accesses the Vendor Search page.
<i>Vendor Item ID</i>	The identifier used by the vendor for this item.
<i>Mfg ID</i>	The identifier for the manufacturer of this item.
<i>Manufacturer</i>	Displays the name of the manufacturer after entry of the ID.
<i>Mfg Item ID</i>	The identifier used by the manufacturer for this item.
<i>Suggest New Vendor</i>	Hyperlink to access the <i>Suggest a Vendor</i> page to enter information on a vendor not already stored in the system. BSU is not using this option.
<i>Additional Information</i>	Notes about this item that are pertinent to the buyer, vendor or requestor.
<i>Send to Vendor</i>	Indicates that this note is to be printed on the purchase order for the vendor.

<i>Show at Receipt</i>	Indicates that this note is to be printed on the receiver.
<i>Show at Voucher</i>	Indicates that this note is to be printed on the voucher.
<i>Request New Item</i>	Indicates that this should be added to the item master. Not used at BSU.
<i>Add Item</i>	Button to add the line to the requisition.

Enter the following information on this page.

- Item Description: ***CP1160 HP Color Inkjet Printer***
- Price: ***\$499.00***
- Quantity: ***1***
- Unit of Measure: ***EA***
- Due Date: ***09/30/2010***

When you click **Add Item**, the line item is added and the page is cleared for you to add a new item, if needed.

Category Selection

Each request will belong to a category. In this example, the category you want to use is **4162 Printing EQ-R**.

To select a category you will click the **Look Up** icon next to the Category field. The Create Requisition *Look Up Category* page is displayed.

Navigation

- eProcurement
- Create Requisition
- Expand Line Defaults section
- Click *Look Up* icon next to **Category** field

ORACLE
Favourites | Main Menu | eProcurement | Create Requisition | Home | Worklist | Add to Favorites | Sign out

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: Category [v] Find

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

Return

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

Expand the Browse Category Tree section.

ORACLE
Favourites | Main Menu | eProcurement | Create Requisition | Home | Worklist | Add to Favorites | Sign out

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: Category [v] Find

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

Select a catalog: Requisition Item Categories [v]

Left | Right: All Items

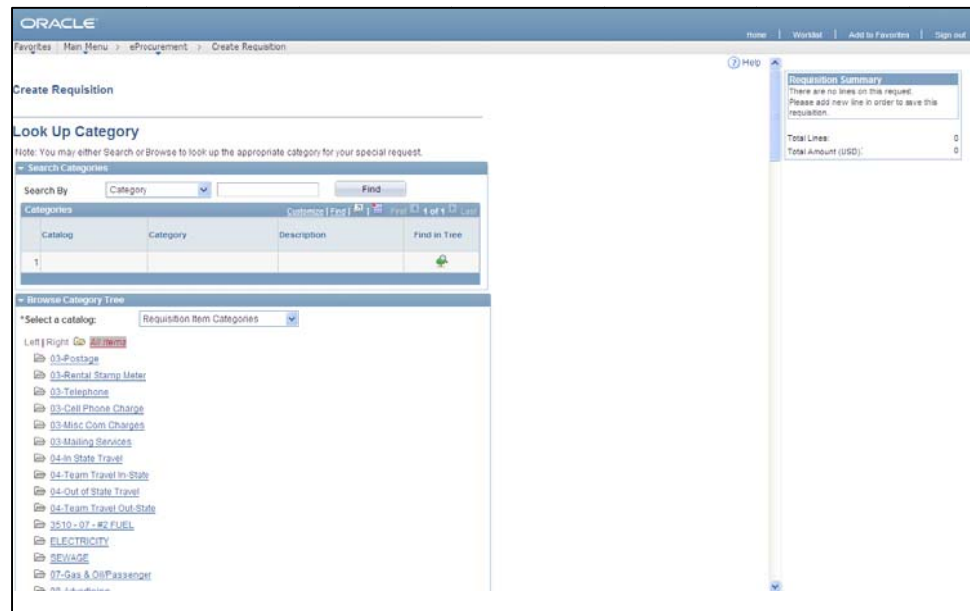
Return

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

Click on the  folder icon next to the *All Items* hyperlink to display the Category Tree.

Note: Do not click on the All Items hyperlink.

A list of the available categories is displayed.

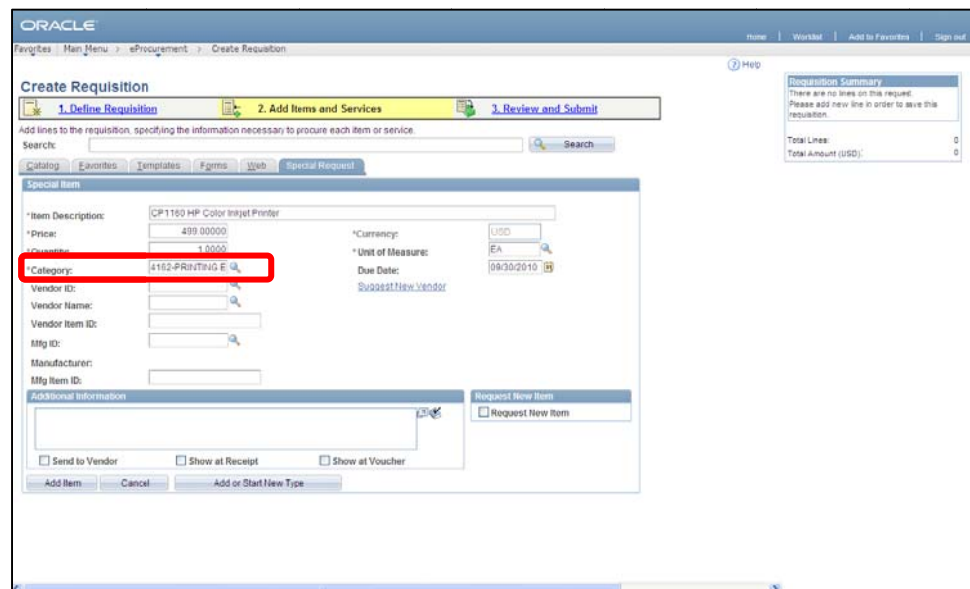


Click on the hyperlink of the category that fits the item you are ordering.

In this example, the category is **10-Dup/Printing Printer**. When you click on that hyperlink the *Add Items and Services* page is displayed with the selected value.

Navigation

- eProcurement
- Create Requisition
- Expand Line Defaults section
- Click Look Up icon next to Category field
- Open Categories
- Select **10-Dup/Printing-Printer**



Vendor Search

The vendor for this purchase is **Data Networks, Inc.** Look up this vendor using the vendor search.

The Vendor Search page appears when you click on the **Look Up** icon next to the vendor field. It has a little more capability than other pages

Navigation

- eProcurement
- Create Requisition
- Define Requisitions
- Expand Line Defaults section
- Click **Look Up** icon next to *Vendor* field

There are a number of search fields used on this page to search for the correct vendor. They include the following:

- Vendor ID
- Name
- Short Vendor Name
- Alternate Vendor Name
- City
- Country
- Postal Code

The more information you enter the easier it is to find the correct vendor. After entering the search criteria, click the **Find** button to display the available matches. Click on the hyperlink of the correct vendor.

The *Add Items and Services* page will be displayed with the selected vendor.

Review and Submit

After entering the information for the item(s) on your requisition, click the **Review and Submit** hyperlink at the top of the page.

The Review and Submit page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit

Oracle eProcurement - 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: BSU | Bowie State University
 Requester: BW_REQUESTER | Bowie Requester
 Requisition Name: Color printer for Joe Rogers
 Currency: USD | Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	CP1160 HP Color Inkjet Printer	Dalla Networks Of America Inc	1.0000	Each	499.00000	499.00

Total Amount: 499.00 USD

Buttons: Add to Favorites, Add to Template(s), Modify Line / Shipping / Accounting, Delete

Comments: Send to Vendor, Show at Receipt, Show on Voucher, Approval Justification

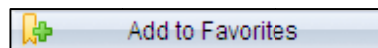
Buttons: Check Budget, Pre-Check Budget, Save & submit, Save & preview approvals, Cancel requisition, End more items

The Requisition Lines are displayed. You can review the Line Details and Add or Edit comments about this line by clicking the icons on the end of each line.

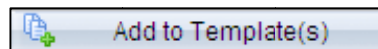
Requisition line numbers are assigned in the order in which you generate them, regardless of where you insert the lines.

The summary box in the upper right corner of the page contains updated information to tell at a glance what is on the requisition.

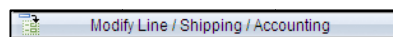
Any open field on this page is available for update. In addition there are several buttons that can be used to finalize the requisition. These include:



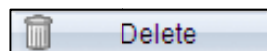
This functionality is not used at BSU.



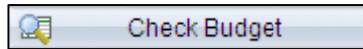
This functionality is not used at BSU.



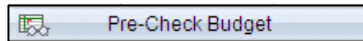
Click to modify the line details, shipping or accounting information for a specific line.



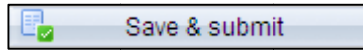
Click to delete this line from the requisition.



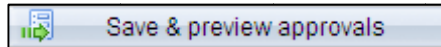
Click to check and reserve budget funds for this requisition.



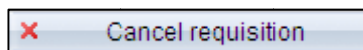
Click to view but not reserve funds for this requisition.



Click to save the information on the requisition and submit to workflow for approval.



Click to save the information and see approvals, but not to submit to workflow.



Click to cancel the entire requisition.

Line Details

You can view additional information about any line item, by clicking on the **Line Details** () icon at the end of the line.

The Line Details page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- **Line Details** icon ()

The following information is available for review, update or entry.

Line

Displays the number assigned to the line item.

Line Status

Displays the current status of the line. If the line is canceled, all fields on the line are unavailable for entry.

<i>Merchandise Amt Category Description</i>	Displays the information entered on the previous page. This information is display only and cannot be changed.
<i>Buyer</i>	Displays the buyer for the item based on the selected category.
<i>Vendor Vendor Location Vendor's Catalog Vendor Item ID Manufacturer ID Manufacturer Manufacturer's Item ID</i>	Displays the information entered on the previous page. It can be changed for this line item on this page, if needed.
<i>Physical Nature</i>	Indicates whether this line item is for goods or for services.
<i>RFQ Required</i>	Indicates that an RFQ is required for ordering.
<i>Amount Only</i>	Indicates that the requisition is to be tracked to amounts and not quantities. <i>This field is to be checked if you are entering a blanket PO.</i>
<i>Inspection Required</i>	Indicates that an inspection of the item is required before receiving.
<i>Suggest New Vendor</i>	Hyperlink that accesses the Suggest New Vendor page to give vendor information to the buyer to set up in the system.
<i>Contract Section</i>	Contains fields to link the requisition to an existing contract.
<i>Sourcing Controls</i>	Allows sourcing to calculate the price.

Make entries and click the **OK** button to save any changes you have made. If no changes were made, click the **Cancel** button to return without saving any changes.

Add/Edit Comments

You can view add comments and attachment for each line by clicking on the **Add/Edit Comments** (💬) icon at the end of the line. These comments are only for the line to which they are attached and give you a place to provide special instructions for one particular line.

The Line Comments page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- **Add/Edit Comment** icon (💬)

Line	Description	Quantity	Unit	Price
1	CP1150 HP Color Ink	10000	Each	499.00000 USD

☐ Send to Vendor
 ☐ Show at Receipt
 ☐ Show at Voucher

[Add Attachment](#)

Requisition Summary
 Description: CP1150 HP Color Inkjet Pri... Qty: 10000
 Total Lines: 1
 Total Amount (USD): 499.00

The following fields are on the *Line Comments* page.

<i>Line</i>	Displays the number assigned to the line item.
<i>Description</i>	Displays the name entered for the line item.
<i>Quantity</i>	Displays the quantity entered for the line item.
<i>Unit</i>	Displays the unit of measure for the line item.
<i>Price</i>	Displays the price for the item/UOM combination.
<i>Comment</i>	A long description field is provided to enter the comment. New vendor information will be entered here. See the <i>Entering New Vendor Information</i> section that follows.

<i>Send to Vendor</i>	Indicates that the comment is to be printed on the purchase order for this line.
<i>Show at Receipt</i>	Indicates that the comment is to show on the receiver.
<i>Show at Voucher</i>	Indicates that the comment is to be shown when creating the voucher.

Entering New Vendor Information

You will use the Comments field to enter Vendor information if the vendor is not already in the system.

The first line in the comment should read: **New Vendor Information.** Followed by the following information:

- Vendor Name
- Vendor Address
- Vendor E-mail Address
- Vendor Phone Number
- Vendor Fax Number (Optional)
- Vendor Tax Identification Number

Add Attachment

The **Add Attachment** button allows you to search for and attach another document for this line item on the requisition.

You will use this to send price sheets or quotes to the buyer. Attache this information to the requisition instead of faxing the information to the buyer.

Make entries and click the **OK** button to save any changes you have made. If no changes were made, click the **Cancel** button to return without saving any changes.

Modify Line / Shipping / Accounting

Click the **Modify Line / Shipping / Accounting** button to enter the information required to charge and ship your item. The Modify Line / Shipping Accounting page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- **Modify Line / Shipping / Accounting** button

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | eProcurement | Create Requisition

Create Requisition

Modify Line / Shipping / Accounting

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 Online Address](#)

Due Date: Attention:

Accounting Information

Customize | Page 1 of 1 | Page 1 of 1

Percent	Location	GL Unit	Fund	Program	Dept	Project	Job ID	Class	Account
1		BSU							

Load Values From Defaults

Apply Cancel

Requisition Summary

Description	Qty	UOM
CP1160 HP Color Inkjet P...	1	EA

Total Lines: 1

Total Amount (USD): 499.00

You will use this page to revise any information that is open to change and to enter information about where the item is to be shipped and the accounts to which the purchase is to be charged.

Shipping Defaults

The *Shipping Information* section is where you enter shipping information to for the item you are ordering.

Navigation

- eProcurement
- Create Requisition
- Expand Line Defaults section
- Ship To= **BSU_RECV**
- Due Date = **10/15/2010**

Some of these values may default based on your user preferences, and others may be entered.

Fields to enter as Shipping Defaults include the following:

Ship To

This is the location where the item ordered is to be delivered. The value should be **BSU_RECV** since all deliveries must go to Central Receiving first and can then be re-routed to your campus location.

Due Date

The preferred date to have this item. This is just a suggestion for the buyer and cannot be considered as a guarantee.

Attention

The name of the person who is to be notified when the item is received.

Accounting Information – Chartfields1

The *Chartfields1* tab in the *Accounting Defaults* section is where you enter the account distribution information required for the items on this requisition.

Navigation

- eProcurement
- Create Requisition
- Expand Line Defaults section
- Chartfields1 = **LIBRA_CTLR**
- GL Unit = **BSU**
- Fund = **40**
- Program = **06**
- Dept = **155040**
- Class = **10**
- Account = **4150**

Some of these values may default based on your user preferences, and others may be entered.

Fields to enter as Accounting Defaults – Chartfields1 include the following:

Percent

The percentage of the amount to be designed to this ChartField combination.

Location

The ultimate location of the requested items.

GL Unit

The GL Business Unit to which the item will be charged.

Fund

Select the appropriate value from the look up screen. The most common value used is **40** for *unrestricted funds*. The *Fund* must be compatible with the *Program* and *Department*.

<i>Program</i>	Select the appropriate value from the look up screen. The <i>Program</i> must be compatible with the <i>Fund</i> and <i>Department</i> .
<i>Dept</i>	Select the appropriate value from the look up screen. The <i>Department</i> must be compatible with the <i>Fund</i> and <i>Program</i>. The description field of the Department look up will display a two-digit number at the end of the description. This will indicate the compatible program for the department code selected. Example: Finance and Administration 06
<i>Project</i>	The Project field is only required for all transactions coded to Fund 43 , <i>Grants</i> .
<i>Job ID</i>	The identifier for the particular job being charged for the item.
<i>Class</i>	Select the appropriate value from the look up screen. The <i>Class</i> must be compatible with the <i>Account</i> .
<i>Account</i>	This field is defaulted based on the <i>Category</i> you selected on the Form screen. The <i>Account</i> must be compatible with the <i>Class</i>. The description field of the Account look up will display a two-digit number at the end of the description. This will indicate the compatible class for the account code selected. Example: Office Equip 11
<i>Affiliate</i>	The affiliate account to be charged for this item.

If you make changes to the Distribution information on the Modify Line / Shipping / accounting page, the *Distribution Options* page appears when you click **Apply** to return to the *Review and Submit* page.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- **Modify Line / Shipping / Accounting** button
- Click **Apply**

ORACLE

Home | Worklist | Add to Favorites | Sign out

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Help

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

Description	Qty	UOM
CP1160 HP Color Inkjet Pri...	1	EA

Total Lines: 1
Total Amount (USD): 499.00

Options on this page include:

- | | |
|------------------------------------|---|
| <i>All Distribution Lines</i> | Applies the changes to all existing lines on the requisition. |
| <i>Matching Distribution Lines</i> | Applies the changes to the line items matching the lines changed on the page. |
| <i>Replace Distribution Lines</i> | Removes the existing distribution lines and replaces with the values on the lines shown here. |

Select the appropriate option and click **OK** to return to the *Review and Submit* page.

Save and Preview Approvals

Click the **Save and Preview Approvals** button to save the data without submitting to workflow for approval.

The confirmation page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- Click **Save and Preview Approvals** button

The screenshot shows the Oracle eProcurement 'Confirmation' page. The page title is 'Confirmation'. It displays the following information:

Requested For:	Bowie Requester	Number of Lines:	1
Requisition Name:	Color printer for Joe Rogers	Total Amount:	499.00 USD
Requisition ID:	0000015749		
Business Unit:	BSU		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		

Below the table, it states 'No approvals required'. At the bottom, there are buttons: 'Submit', 'Edit Requisition', 'Apply Approval Changes', 'Check Budget', and 'Pre-Check Budget'. There are also links: 'View portable version', 'Manage Requisitions', and 'Create New Requisition'.

The following information is displayed on this page.

<i>Requested for</i>	The name of the requestor.
<i>Number of Lines</i>	The total number of lines on the requisition.
<i>Requisition Name</i>	The description of the requisition.
<i>Total Amount</i>	The total amount of the requisition.
<i>Requisition ID</i>	The number assigned to the requisition by the system.
<i>Business Unit</i>	BSU, the only business unit used.
<i>Status</i>	The current status of the requisition. Immediately after saving, this is <i>Open</i> .
<i>Priority</i>	The priority assigned to the requisition.
<i>Budget Status</i>	The status of the budget check.

If approvals are required, they will be listed in the next section.

Actions you can take from this page include:

<i>Submit</i>	Submit to workflow for the next step in the purchasing process.
<i>Edit Requisition</i>	Open the requisition to make changes.
<i>Check Budget</i>	Check the budget and reserve funds for the request.
<i>Pre-Check Budget</i>	Check the budget without reserving funds.
<u><i>View Printable Version</i></u>	View a PDF version of the requisition that you can print.
<u><i>Manage Requisitions</i></u>	Go to the Manage Requisitions page to work on this or other requisitions.
Create New Requisition	Go to the Create New Requisition page to create a new request.

Click the **Edit Requisition** button to return to the requisition.

Pre-Check the Requisition Budget

Budget Check is the term used to describe the PeopleSoft system's process of checking a purchase against a budget prior to committing to a vendor. Prior to submitting the requisition for approval, you will pre-check the budget.

If the funds are available for the purchase, the system will indicate that the budget status is *Provisionally Valid* meaning that the funds are available at the time the check was done but they have not been encumbered. If the funds are not available, the system will display an error and the purchase requisition will not move forward.

Select the **Pre-Check Budget** option before submitting the requisition to workflow.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- Click **Pre-Check Budget** button

The screenshot shows the Oracle 'Edit Requisition' page. At the top, there are three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there are fields for 'Business Unit' (BSU), 'Requester' (BW_REQUESTER), 'Requisition Name' (Color printer for Joe Rogers), 'Currency' (USD), and 'Priority' (Medium). A table titled 'Requisition Lines' shows one line item: 'CP1160 HP Color Inkjet Printer' with a quantity of 1.0000, price of 499.00000, and total of 499.00. Below the table, there are buttons for 'Check Budget', 'Pre-Check Budget', 'Save & submit', 'Save & preview approvals', 'Cancel Changes', and 'Find more items'. The 'Pre-Check Budget' button is highlighted. On the right side, there is a 'Requisition Summary' box showing 'Total Lines: 1' and 'Total Amount (USD): 499.00'. At the bottom, there are checkboxes for 'Send to Vendor', 'Show at Receipt', 'Shown at Voucher', and 'Approval Justification'. The 'Budget Checking Status' is displayed as 'Provisionally Valid'.

The budget status will change to **Provisionally Valid** if the funds are available.

The Budget Status will be reflected as one of the following.

Not Chk'd (not checked)

This is the requisition's initial budget checking status. The status may also return to this value after a value change that affected the budget status.

Provisionally Valid

The Pre-Budget Check process has verified that the funds are available but the funds have not been encumbered.

Valid

The requisition has been successfully budget checked and the funds have been encumbered.

Error

The requisition has failed budget checking. The text is enabled as a link, which you can click to access the Requisition Exceptions page where you can view budget check exceptions for this requisition. Users with appropriate authority can override the budget exceptions on the Requisition Exceptions page.

Save and Submit

Click the Save and Submit button to submit the requisition to the workflow process. The requisition will be placed in the worklist of the next line approver.

The confirmation page is displayed.

Navigation

- eProcurement
- Create Requisition
- Add Items and Services
- Review and Submit
- Click **Save & Submit** button

The screenshot shows the Oracle Requisition Confirmation page. The main content area displays the following information:

Confirmation	
Requested For:	Bowie Requester
Requisition Name:	Color printer for Joe Rogers
Requisition ID:	0000015749
Business Unit:	BSU
Status:	Pending
Priority:	Medium
Budget Status:	Not Checked

Number of Lines: 1
Total Amount: 499.00 USD

Approver: Color printer for Joe Rogers: Pending

Buttons: Submit, Edit Requisition, Apply Approval Changes, Check Budget, Pre-Check Budget

Links: View printable version, Manage Requisitions, Create New Requisition, Approval History

Requisition Summary (Right Panel):

Description	Qty	Unit
CP1160 HP Color Inkjet Pri...	1	EA
Total Lines: 1		
Total Amount (USD): 499.00		

This page gives you the status and information on the approver.