

PRINTING A REQUISITION

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 9



Bowie State University
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PRINTING A REQUISITION

Overview

There are many ways to print a copy of your purchase requisition.

- Using the View Printable Version hyperlink on many of the pages
- Using the View Printable Version action on the Manage Requisitions page
- Using the Requisition Report hyperlink on the Manage Requisitions page

Objectives

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

- Successfully print a purchase requisition.

Viewing a Printable Version while viewing the Requisition

On many of the pages in the requisition process, there are **View Printable Version** hyperlinks. Click on one of these hyperlink and a page pops up in a new window showing the requisition formatted for printing.

Use the Print function from your web browser to print the window.

Viewing a Printable Version from the Manage Requisitions Page

Navigate to the Manage Requisitions page.

Navigation

- eProcurement
- Manage Requisitions

Req ID	Requisition Name	BU	Date	Status	Budget	Total	Action
0000015754	Lunch for Office Meeting	BSU	08/27/2010	Cancelled	Valid	0.00 USD	[Select Action] Go
0000015753	EXT HD for CTRLR laptops	BSU	08/25/2010	Approved	Not Chd	917.93 USD	[Select Action] Go
0000015752	New computer for Janet ...	BSU	08/25/2010	Approved	Valid	1,199.00 USD	[Select Action] Go
0000015751	Replacement Printers fo ...	BSU	08/25/2010	Pending	Not Chd	4,243.00 USD	[Select Action] Go
0000015750	TEST WF - 21	BSU	08/25/2010	Approved	Valid	10.00 USD	[Select Action] Go
0000015749	Color printer for Joe R...	BSU	08/25/2010	Approved	Prov Valid	499.00 USD	[Select Action] Go

Search for your requisition and once you have found it, selecte View Printable Version in the action drop-down list.

Click **Go**.

A page pops up in a new window showing the requisition formatted for printing.

Use the Print function from your web browser to print the window.

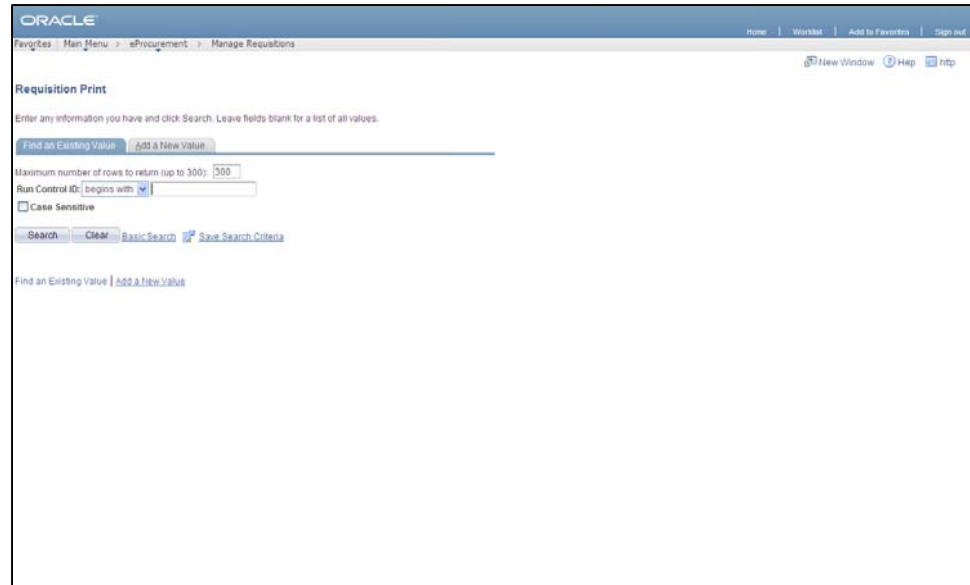
Running a Requisition Report

Navigate to the Manage Requisition window as shown above.

Click the **Requisition Report** hyperlink at the bottom of the page.

Navigation

- eProcurement
- Manage Requisitions
- Click **Requisition Report** hyperlink

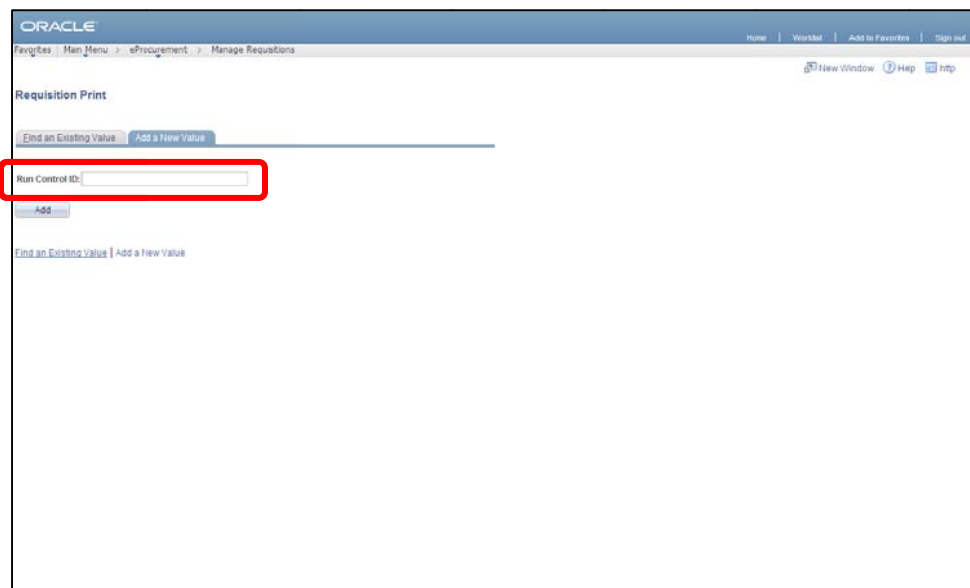


If you have not already set up a Run Control ID (an identifier used to associate your report parameters to the report you run), click the **Add a New Value** tab.

If you already have established a Run Control ID, you can enter it, using search functions as needed, in the *Run Control ID* field on the *Find an Existing Value* page.

Navigation

- eProcurement
- Manage Requisitions
- Click **Requisition Report** hyperlink
- Click **Add a New Value** tab



Enter the identifier you want to use when running the report.

For this example, enter **printreq** in the **Run Control ID** field. Run Control IDs are specific to your User ID.

Click **Add**.

Navigation

- eProcurement
- Manage Requisitions
- Click **Requisition Report** hyperlink
- Add or enter **Run Control ID**

Print Requisition

Run Control ID: train Report Manager Process Monitor **Run**

Language: English Specified Recipient's

Report Request Parameters

Business Unit: [] Requisition ID: [] From Date: [] Through Date: [] Requester: []

Statuses to Include

☐ Approved ☐ Canceled ☐ Completed ☐ Open ☐ Pending **Select All**

NOT On Hold [v]

Save **Notify** **Add** **Update/Display**

Enter the following parameters to print the requisition:

- Business Unit = **BSU**
- Requisition ID = your requisition number
- Click **Select All** in the *Statuses to Include* box

Use the search options as needed.

ORACLE

Favorites Main Menu eProcurement Manage Requisitions Home Worklist Add to Favorites Sign Out

Print Requisition

Run Control ID: printrec Report Manager Process Monitor **Run**

Language: English Specified Recipient's

Report Request Parameters

Business Unit: BSU Requisition ID: 0000015479 From Date: [] Through Date: [] Requester: []

Statuses to Include

☒ Approved ☒ Canceled ☒ Completed ☒ Open ☒ Pending **Select All**

NOT On Hold [v]

Save **Notify** **Add** **Update/Display**

Click **Run**.

Process Scheduler Request

User ID: BW_REQUESTER Run Control ID: printreq

Server Name: Run Date: 09/01/2010 Run Time: 12:55:03PM

Recurrence: Time Zone: Reset to Current Date/Time

Select	Description	Process Name	Process Type	Type	Format	Distribution
☒	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	☒

OK Cancel

Be sure that the *Type* is **Web** and the *Format* is **PDF**.

Click **OK**.

The Print Requisitions page returns with a Process Number to use to track the report.

Print Requisition

Run Control ID: printreq Language: English Specified Recipient's

Run Process Instance 227680

Report Request Parameters

Business Unit: BSU Requisition ID: 0000015479

From Date: Through Date: Requester:

Statistics to Include

☒ Approved ☒ Canceled ☒ Completed ☒ Open ☒ Pending

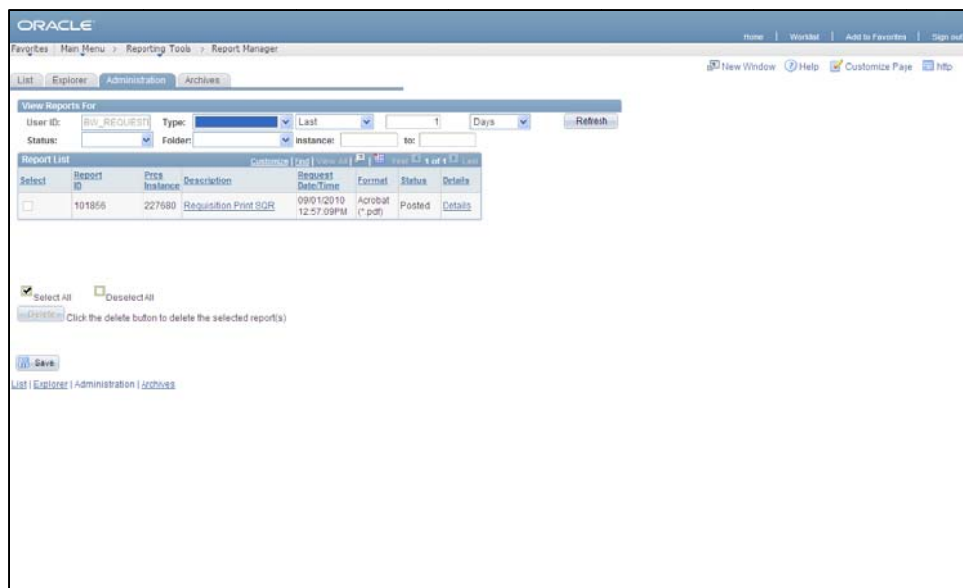
NOT On Hold

Save Testify Add Update Display

Click the drop-down menu for the Main Menu and navigate to the Report Manager.

Navigation

- Reporting Tools
- Report Manager
- Click the **Administration** tab



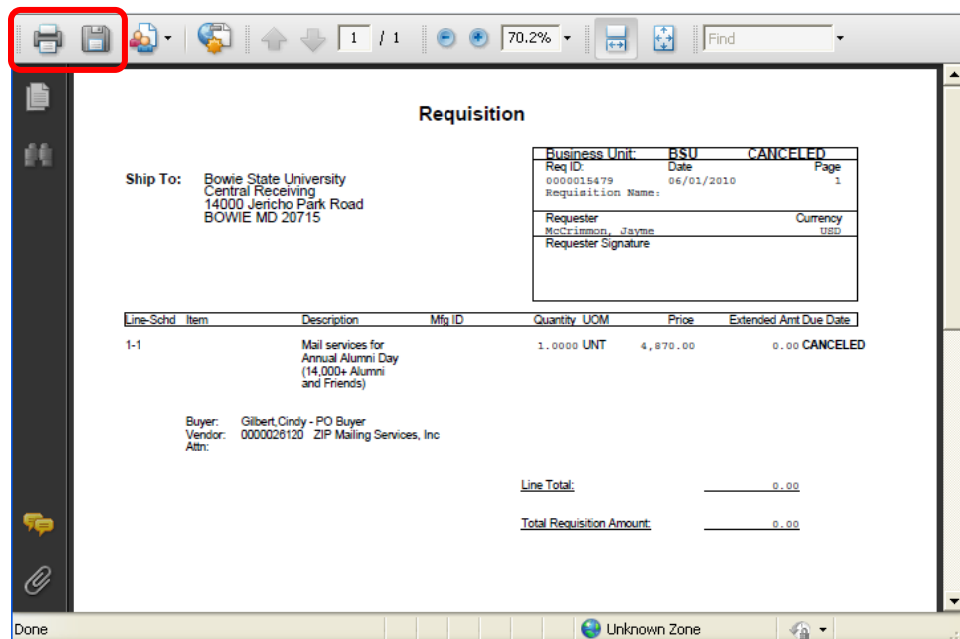
The report should be listed. Verify the process instance number, if needed.

Click the name of the report in the Description field.

A new window pops up to display the report in a PDF format.

Navigation

- Reporting Tools
- Report Manager
- Click the **Administration** tab
- Click the report Description hyperlink



Use the PDF controls to save or print the requisition.

Emailing a Requisition

If you save a PDF copy of the e-mail, you can e-mail it as an attachment through your regular e-mail.

Alternatively, you can print the requisition so that it will be sent to you or another user.

Using the Type field on the Process Scheduler page allows two ways to print a purchase requisition.

Type = Web (PeopleSoft will print to the web)

Type = Email (PeopleSoft will email the requisition to you or someone else)

To print directly to e-mail, follow the steps shown above to navigate to the Process Scheduler Request page for the Print Requisitions process.

- eProcurement
- Manage Requisitions
- Click **Requisition Report** hyperlink
- Add or enter **Run Control ID**
- Enter fields
- Click **Run**

Select	Description	Process Name	Process Type	Type	Format	Distribution
☒	Requisition Print SQR	PQR0010	SQR Report	Web	PDF	Distribution

Change the *Type* to **Email** and leave the *Format* as **PDF**.

Click the ***Distribution*** hyperlink.

Use the fields in the *Email Only* section on this page to send the message:

<i>Email Web Report</i>	Check to e-mail the web-based report.
<i>Email Subject</i>	Specify the subject line for your e-mail.
<i>Message Text</i>	Enter any message you want to send with the report.
<i>Email Address List</i>	Enter the e-mail addresses to send to if the users are not users of the PeopleSoft system.
<i>Distribute To</i>	Enter the system User IDs of the persons who are to receive the report. Separate addresses with semicolons.

Click **OK**.

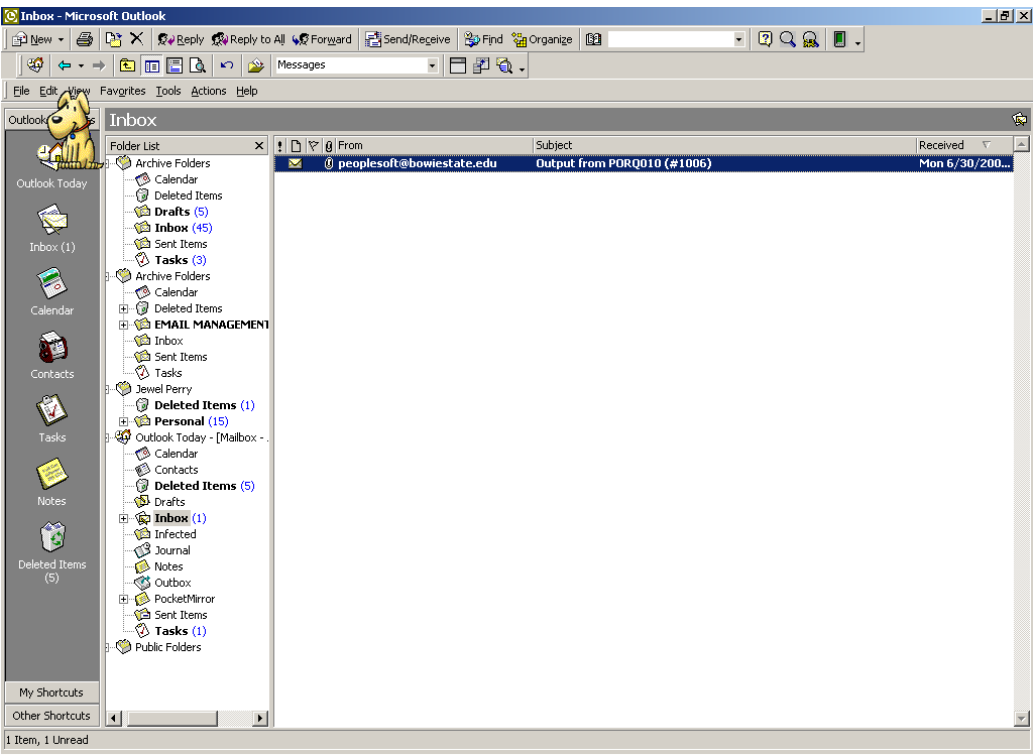
The Process Scheduler Request page is displayed.

Click OK to run the report.

The Print Requisitions page is displayed with the new *Process Instance Number*.

Go to Outlook and check your inbox.

Open the document and double click on the PDF attachment to display the printed requisition.



It can only be displayed if the computer has Acrobat Reader.

