PeopleSoft Financials
ePro Process Guide

Basic Requisitions
Introduction to the PeopleSoft Financials Web Requisition

The PeopleSoft Web Requisition is a web-based application, which means that it can be accessed using a web browser such as Microsoft® Internet Explorer. It can be run on either a personal computer or a Macintosh computer, without having to install the PeopleSoft software on your desktop computer.

UTHSCSA developed the PeopleSoft Financials Web Requisition to provide the University with a uniform purchase requisition and a uniform method of processing requisitions. The PeopleSoft Financials Web Requisition can be used to process a Basic purchase requisition, General Stores requisition, Direct Connect requisition, or to request authorization to travel. It is also used by satellite purchasing sites to process their requisitions.

The major processes we will review are:
- Processing a requisition
- Sending notification to the approvers
- Approving and denying a requisition
- Inquiring upon the status of a requisition
- Printing a requisition
- Copying, deleting, and canceling a requisition

After familiarizing yourself with the subject matter contained in this Process Guide, you will have a basic understanding of how to process the following type of requisition using the PeopleSoft Web Requisition:

- A Basic Purchase Requisition
# Table of Contents

Introduction to the PeopleSoft Financials Web Requisition ...................................................... 2

Chapter 1 Signing onto the Health Science Center (HSC) Portal ................................................ 6

Health Science Center - Portal Logon .................................................................................................... 6

The Financials Management Menu ..................................................................................................... 8

A Closer Look at the Financials Management Menu ......................................................................... 9

Chapter 2 Preparing a Basic Purchase Requisition ........................................................................ 12

Requisition Defaults ............................................................................................................................. 13

Add Items and Services ....................................................................................................................... 20

Adding Requisition Lines .................................................................................................................... 22

Shipping and Handling Charges and Instructions ............................................................................. 23

Review and Submit ............................................................................................................................. 23

Deleting a Requisition Line ............................................................................................................... 24

Editing a Requisition Line .................................................................................................................. 25

Adding Comments to Your Requisition ............................................................................................. 26

Saving a Partially Completed Requisition ....................................................................................... 28

Confirmation ........................................................................................................................................ 30

Check Budget ....................................................................................................................................... 30

Requisition Approval Notifications ................................................................................................. 31

Chapter 3 Approval Scenarios ........................................................................................................... 35

Approval Scenario 1: When a Requester is Only a Requester .............................................................. 35

Approval Scenario 2: When a Requester is also approving as Department Approver ....................... 36

Approval Scenario 3: When a Requester is also approving as Project Approver .............................. 37
 Approval Scenario 4: When a Requester is in Both Approver Roles ......................................................... 37
 Approval Scenario 5: When a Requester is an Approver, but needs an approver other than themselves ................................................................. 38
 Approval Scenario 6: When a Basic purchase requisition needs Environmental Health and Safety (SAF) Approval .................................................................................................................. 38

 Chapter 4 Special Situations-Basic Purchase Requisitions .............................................................................. 39

 Resolution Problems with Check Budget ........................................................................................................ 39
 Approvers are not assigned to a Project ID or Department ............................................................................ 40
 Line Comments ........................................................................................................................................ 41
 Creating a Template .................................................................................................................................... 42
 Adding Additional Items to a Template .......................................................................................................... 43
 Reserving a PO Number ................................................................................................................................ 44
 Vendor Prepayments ................................................................................................................................ 44
 Justification Memo ........................................................................................................................................ 44
 Radioactive/Hazardous Materials .................................................................................................................... 46
 Suggested Vendor Not in Vendor File ............................................................................................................. 48

 Chapter 5 Manage a Requisition ...................................................................................................................... 49

 Retrieve a Requisition to Edit .......................................................................................................................... 52
 Copying a Requisition ..................................................................................................................................... 54
 Canceling Entire Requisitions ........................................................................................................................ 55
 Updating a Cancelled Requisition .................................................................................................................. 57
 Delete Requisition Lines after Approval Notifications .................................................................................. 58
 Cancel a Line after Approval Notification .................................................................................................... 60
 How to place a Requisition Status to Open ..................................................................................................... 62
How to Retrigger Approval Notifications ................................................................. 66

Chapter 6 Printing a Requisition/Purchase Order .................................................... 67

Requesting an e-REQ Requisition Print or Purchase Order .................................... 67

Chapter 7 HSC Self Service Inquiries ...................................................................... 71

Procure-To-Pay Inquiry ............................................................................................. 71

Project Budget Inquiry ............................................................................................... 73

Chapter 8 Support Departments ............................................................................... 75

Chapter 9 Online Training ......................................................................................... 76

APPENDIX ................................................................................................................ 77
Chapter 1
Signing onto the Health Science Center (HSC) Portal

To use the PeopleSoft Financials, one must first open a Microsoft Internet Explorer browser session.

Health Science Center - Portal Logon

- Enter the web address for the HSC Homepage in the address field of your Microsoft Internet Explorer window – www.uthscsa.edu
- Click on the link titled inside.uthscsa (portal). This will be located on the bottom of the page.

- This will bring up the HSC Portal logon.

- Enter your NT User Name (Domain ID) and Password.
After successfully logging into the Portal, a Menu resembling the one shown below will appear. Clicking the text *HSC Business Applications* will cause the menu to expand, revealing sub-menu options.

- **Click on the HSC Business Applications link.**

- **Click on the Financials link**

- **Click on the PeopleSoft Financials link**

Once the PeopleSoft Financials link has been selected, a new browser window will display.
The Financials Management Menu

To expand a menu, click the menu text. For example, clicking the text *eProcurement* will cause the menu to expand, revealing sub-menu options. Clicking on a sub-menu item, such as *Create Requisition*, causes the Financials Menu to change and display a new page to work from.

An expanded menu is denoted by an inverted ▼. Once expanded, you can collapse a menu by clicking the menu text.

Note: Click the small symbol at the top right corner to collapse this menu. This action will allow you a broader view of the PeopleSoft Web Requisition in your browser session. Clicking the symbol a second time causes the menu to expand again.
A Closer Look at the Financials Management Menu

HSC Self Service Inquiries
Clicking on HSC Self Service Inquiries causes the menu options shown at right to become available. Each of its sub-menu items are explained below.

Account Chartfield
The Account Chartfield Inquiry will allow you to enter an account and see the description for the account and its monetary type (example: revenue, expense, fund equity).

Blanket Travel Inquiry
The Blanket Travel Inquiry will display a listing of individuals who are authorized to travel for the Health Science Center.

Fund Chartfield
The Fund Chartfield Inquiry will allow you to enter a fund code and see the description for the fund.

Historical Req Approval Inquiry
The Historical Req Approval Inquiry will allow you to view the approval inquiry for requisitions created prior to December 2, 2010.

Offsite Property Inquiry
The Offsite Property Inquiry will provide a record of individuals and the items they are in possession of at an off campus location.

PO Quick View
This feature offers a view of the entire purchase order in a new window which offers individuals the option to print from this format.

Print A Requisition/Print A Purchase Order
The requisition printing process in PeopleSoft will generate an e-REQ (electronic Requisition) that is sent via e-mail to the person requesting it. The email has an attachment of the requested requisition or purchase order. The attachment can be viewed and printed using the free Adobe Acrobat® Reader™ that is included as part of the UTHSCSA standard desktop configuration.
HSC Self Service Inquiries continued....

Procure-to-Pay Inquiry
This inquiry will allow you to research Requisitions, PO’s, Vouchers and Checks. You are able to perform drill-downs on the search results. You will be able to see who entered the requisition and date it was entered. It will also show if your requisition has a valid budget check.

Project Budget Inquiry
The Project Budget Inquiry is a real-time inquiry that shows the amount of pre-encumbrances, expenditures, and free balance for a Project ID.

Project Chartfield
The field Principal Investigator has been added to the Project Chartfield inquiry. For projects other than grants and contracts, the PI field will be blank.

Req Quick View
This feature offers a view of the entire requisition in a new window which offers individuals the option to print from this format.

Signature Inquiry by Project
The Signature Inquiry by Project will list all the Project Approvers on a specific project number.

Signature Inquiry by Project Approver
The Signature Inquiry by Project Approver will list all the project numbers a Project Approver is authorized to approve on.

Vendor
The vendor search will list information regarding vendors the UT Health Science Center has made purchases with. The listing will display general information regarding the vendor and proper contact information.

Voucher Quick View
This feature offers a view of the entire voucher in a new window which offers individuals the option to print from this format.
eProcurement

Clicking on eProcurement causes the menu options shown at right to become available. Each of its sub-menu items are explained below.

Create a Requisition
Requesters will click here to prepare a new requisition.

Manage Requisitions
Manage Requisitions will contain options which will allow a Requester to review, edit, view the status, cancel or copy requisitions.

Approve Requisitions
Approvers will use this menu option to take actions on requisitions which need attention. Both the Department Approver and Project Approver will access this menu option.
Chapter 2
Preparing a Basic Purchase Requisition

The PeopleSoft Web Requisition is a multi-purpose requisition. It can be used to prepare a Basic purchase requisition, a General Stores requisition, a Travel requisition, or a Direct Connect requisition. The ultimate recipient of a basic purchase requisition is the UTHSCSA Purchasing Department.

Processing a Basic purchase requisition involves four basic steps. First, the Requester enters the requisition, specifying the vendor, contact and delivery information and item(s) to be purchased. Next, the Requester must save and check budget to ensure a valid budget status. This will ensure the Project ID specified on the requisition has sufficient funds to cover the purchase. If the requisition passes the Check Budget process, the Requester must then select the preferred approvers and notify one or more persons to approve the requisition. These approvers, known as the Project Approver and Department Approver, may either approve or deny the Requester’s purchase requisition. If one person is approving as both Project Approver and Department Approver, the approver must complete both approval steps for the requisition’s status to change from Pending to Approved.

If either approver denies the Basic purchase requisition, the Requester must make the necessary changes. In some cases, the Requester will be required to Check Budget the requisition again. The Requester can then notify the approver(s) to review the requisition to ensure the requested changes were made. Upon approval of the requisition by both Project Approver and Department Approver, the status of the requisition becomes Approved, at which time the Purchasing Department will assign the requisition to a buyer and process the order.
Requisition Defaults

The Requisition Defaults page is the first page the Requester will complete when adding a requisition. This page contains the REQ type, Vendor name, basic delivery information, and contact information. **All required fields must be completed before proceeding to the next page.**

When the **Requisition Defaults** have been completed, click the **Continue** button on the lower left corner of the screen to continue to the next page.

**Requester:** The Requester is defaulted into the first field and represents the individual who is currently signed on to the UTHSCSA Portal.

**Requisition Name:** A 30 character text field is optional and can be used by a Requester to include a meaningful note about a requisition. You can search for a requisition based on the text entered in the Requisition Name. It will not be reviewed by Purchasing, nor does the comment carry forward to a purchase order.

Note: Be sure your Requisition Name is descriptive, as this field is also used as the **Subject Line** on the email notification sent to your approvers.

**Requisition Type:** This is a required field used to distinguish which type of requisition will be generated. The Requisition Type chosen will then be used to default fields in the proceeding pages. **BASIC** must be selected when preparing a Basic Web requisition. **When you click Continue, the Requisition Type cannot be adjusted.**
**Priority:** The priority option should be used in emergency situations. This will alert the Purchasing Department to give the requisition priority handling. This option is used only for requisitions processed by the Purchasing Department. It is not used for General Stores, Travel or Direct Connect requisitions. The priority default will be set to Medium. If a Requester selects High, a warning message will be displayed to remind the user High priority orders are subject to higher shipping costs.

**Radioactive / Hazardous:** If items being ordered are classified as either Radioactive or Hazardous the check box must be checked. When checked, the requisition will be routed to Environmental Health & Safety (EHS) after the Project and Department Approver have approved the requisition.

**Vendor ID:** This is a required field. If you do not have a suggested vendor, type “UNKNOWN” in this field and use the Review and Submit page to communicate to the Purchasing Dept. which vendor is needed. See *Suggested Vendor Not in Vendor File* for more information.

To search for a vendor, click on the Look Up icon using the vendor search page shown below.

**Short Vendor Name:** You will find it useful when searching for a vendor to select contains from the drop down OR surround your search term with a wildcard symbol (% sign). Once you have entered a portion of the vendor name, click the **Look Up** pushbutton.
All vendors containing the specified criteria will be displayed in the search results. Select the desired vendor by clicking on the name. The vendor’s ID number will populate in the Vendor field and its name and default order location will appear when you tab out of the Vendor field.

**Vendor Location:** A default order location will populate this field. If a different vendor address is needed, click on the drop-down arrow and select the desired vendor location. If the desired vendor location is not listed, include a comment on the Review and Submit page of your requisition to notify the Purchasing Department; they will add the name into the vendor file.
*Project:* This is a required field. The Project ID is the source of funds to be used to pay for the items being purchased. Project IDs listed within the Requester’s profile is based on their security. The Project ID Look Up will list only those Project IDs which are active. **You can use only one Project ID per requisition.**

*Ship To:* This is a required field. Select the campus location where you want the vendor to deliver the goods.

*Fiscal Year:* This is a required field. The fiscal year (Budget Period) will default in. If the Fiscal Year needs to be changed, click the Look Up icon.

*Due Date:* This is a required field. You must enter a due date of 5 – 7 business days after today’s date. Date can be entered using an mmddyy format without any dashes or slashes. When you tab out of the Due Date field, the date will automatically be formatted using an mm/dd/yyyy format. A warning message will display if a date entered is greater or less than 30 days of the current day.

**Contact Information**

*Cntct Name:* This is a required field. List the person to be contacted if there are questions about this order.

*Cntct Phone:* This is a required field. List the phone number of the contact person. It is recommended that you enter the full phone number, including the area code.

*Cntct Email:* List the email address (@uthscsa.edu) of the contact person; optional, but recommended.

**Load Contact Information:** Clicking on this pushbutton will automatically load the contact information of the person who is logged onto the UTHSCA portal.
**Deliver To:** The building and room number where you want Central Receiving to deliver the goods once they have arrived. This is a 10 character field that can include both letters and numbers. **If you need to enter additional delivery instructions, a standard comment (DL01) exists for this purpose.** For additional instructions, please visit the Standard Comments section.

**Same as Contact:** Check this box if the contact person is also the person to whom the goods should be delivered. Checking this box will default in the Deliver Name and Deliver Phn fields.

**Deliver Name:** The person to whom Central Receiving should deliver the goods and/or contact regarding delivery. If different from the contact person for the requisition, type a name here. This field will be grayed out if the Same as Contact box is checked.

**Deliver Phn:** The phone number of the person whom Central Receiving can contact regarding delivery. Enter the complete phone number. This field will be grayed out if the Same as Contact box is checked.
Problems with Proceeding

In the event you are not allowed to continue to the Add Items and Services page, any field missing information or contains incorrectly entered information, will display a red background. This will inform you information must be re-entered into the field. The next two issues are the most frequent with users.

**Issue:** Project ID is incorrect and the below message displays

![Invalidate value - press the prompt button or hyperlink for a list of valid values (15.11)](image)

The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

**Resolution:** Click the OK button and select the PID Look Up icon to select a valid Project ID. To confirm a Project ID being used does in fact belong to a department which you have access for, navigate to:

*PeopleSoft Financials ➔ HSC Self Service Inquiries ➔ Project Chartfield*

This will display information pertaining to the Project ID and display the department who is the owner of the project id.

**Issue:** You cannot proceed to the next page when selecting the Continue button.
Resolution: If you are prevented from proceeding to the next page, you will receive a red background(s) in the required fields which are causing the error. Proceed by clicking OK to the error message and entering the data into the fields with the red background.

Issue: You receive a message regarding the Requisition name.

Resolution: You will not be prevented from proceeding, but be aware, if a Requisition Name is not entered, an Approver will only view the Requisition ID within the subject line of the approval notification.

To add a Requisition Name: Click Cancel

To continue: Click OK
Add Items and Services

The second page the Requester will complete when creating a Basic Web Requisition is the Add Items and Services page. The information displayed on the Add Items and Services page is dependent on the Requisition Type chosen on the first page. Two sub tabs available for a Basic requisition are the Templates Tab and the Special Request Tab.

The Special Request tab is used to enter items that will be ordered. All fields with an asterisk are required.

Fields which are defaulted are the *Currency; *Category; Due Date; and the Vendor ID; which were populated from the Requisition Defaults page.

*Item Description: Type in a clear and basic description of the item being ordered to prevent any delays in Purchasing. Although this field holds up to 254 characters, only 30 characters will be viewable when the requisition is reviewed.

*Price: Enter the unit price for the item being ordered. If there is no charge for the item, leave the price set to zero. You must always attempt to estimate the cost of the item, if unknown, or Purchasing will send the requisition back to the department for corrections.
*Quantity:* Enter the quantity of the item being ordered.

*Unit of Measure(UOM):* Enter the unit of measure for the item being ordered. In most instances, you will use one of the following units of measure:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Unit of Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>EA</td>
<td>Each</td>
</tr>
<tr>
<td>BOX</td>
<td>Box</td>
</tr>
<tr>
<td>CS</td>
<td>Case</td>
</tr>
<tr>
<td>FT</td>
<td>Feet</td>
</tr>
<tr>
<td>LBS</td>
<td>Pounds</td>
</tr>
<tr>
<td>UNT</td>
<td>Unit</td>
</tr>
</tbody>
</table>

To see a complete list of the units of measure available, click the Look Up icon, for the UOM field.

If you are unsure of which unit of measure to select, choose EA and enter the specific detail in the line description (example: Pencils - box of 100).

**Vendor Item ID:** (Highly Recommended) Enter a part number, vendor stock number, or catalogumber. This is a 16-character field and should only include the specific alpha-numeric Vendor Item ID associated with the item. Additional text (such as ‘Cat #’ or ‘Product #’) is not needed and if preferred by the department, can be included in the Item Description field or Additional Information field.

**Additional Information:** Any additional information regarding the item being ordered should be entered into the Additional Information box. With a 2,000 character limit, you must be detailed when ordering. To spell check the information entered, select the spell check icon .
Adding Requisition Lines

To add items to your requisition, complete all required* fields then click the **Add Item** button within **Special Request** tab.

Your item will display within the **Requisition Summary**. The fields within the **Special Request** tab will then reset, allowing you to add additional items.
Shipping and Handling Charges and Instructions

Shipping and Handling Charges should not be entered into a requisition. Shipping and Handling charges will be maintained through purchasing when the requisition has been assigned to a buyer.

Review and Submit

The third page the Requester must complete when creating a Basic Web Requisition is the Review and Submit. This page is used to edit and delete line item information and add comments to the requisition. These comments may be added free form, Standard Comments or Justification Memo.

The comments you enter on this page may be included for the benefit of anyone who views the requisition including but not limited to: the Requester, the Approver, the Vendor or Central Receiving. Comments included with your requisition will carry forward to the purchase order.

Comments should be entered as separate rows. To format comments click the Enter Key on the keyboard. From the Header Comments window, use the scroll bar to view comments entered.
Deleting a Requisition Line

To delete an item, click on the check box preceding the item. Click the Delete icon. This will remove the line item from your requisition.

To delete a line item, follow the steps below:

1. From the Review and Submit page, click the check box for the appropriate line
2. Click the button

Click the button to delete the row; otherwise, click the pushbutton.

If your requisition has only one line, it cannot be deleted. You will either need to edit the existing line, or insert a second line and then delete line 1.
**Editing a Requisition Line**

To edit information which was entered for the specific item being ordered, each line item contains a hyperlink via the Description of the item. By selecting the Description link, you will be directed back to the Add Items and Services page where you will be able to make any edits to your line item. To edit a line item, follow the steps below:

1. From the Review and Submit page, click the item description hyperlink.

2. You will be directed to the specific line chosen in the Add Items and Services tab. Enter edits as needed.

3. Click the **[OK]** button once edits have been made.

4. Continue completing the requisition line items as necessary.
Adding Comments to Your Requisition

Comments may be added free from, Standard Comments or on a Justification Memo.

The comments you enter on this page may be included for the benefit of anyone who views the requisition including but not limited to: the Requester, the Approvers, the Vendor or Central Receiving. Comments included with your requisition will carry forward to the purchase order.

Adding Free-form Comments

Free-form comments are entered directly by typing in the white comment window labeled Header Comments within the Review and Submit page. The comment will print by default.

Adding Standard Comments

Standard Comments are templates provided to aid the Requesters to include important details they might otherwise forget to include in their requisition comments.
To enter Standard Comments, follow the below steps:

1. Click the **Standard Comments** pushbutton.

2. The Standard Comments page will display. Click the **Look Up** icon, for the **Comment ID** field.

3. Click the Standard Comment you want to use.
4. The Comment ID field will be populated with the ID number of the Standard Comment you selected.
   
   Click the **OK** pushbutton to accept the Standard Comment.

The Standard Comment template will populate in the Header comments window.
Edit the Standard comment as needed. The template text can also be edited to accommodate information.

To insert an additional comment(s), select the Standard Comments pushbutton again and repeat the steps. Once the new Standard Comment is in the text box, you may need to edit the spacing to identify and separate instructions between the Standard Comments.

**Saving a Partially Completed Requisition**

Before saving a partially completed requisition, minimum required fields listed below, must be completed. You cannot save a requisition without entering at least one line item on the Add Items and Services page.

<table>
<thead>
<tr>
<th>Location of Fields</th>
<th>Minimum Required Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Requisition Defaults</td>
<td>All required fields must be completed before proceeding to the next page</td>
</tr>
<tr>
<td>2. Add Items and Services</td>
<td>One line item must be entered before proceeding to the next page</td>
</tr>
<tr>
<td>3. Review and Submit</td>
<td>NONE</td>
</tr>
</tbody>
</table>

In order for the system to generate a Requisition ID, you must be on the **Review and Submit** page of the Requisition. Click the **Save & preview approvals** button. With the minimum required fields completed, you will be assigned a system generated Requisition ID and be directed to the Confirmation page.
At this point, you have the option to exit the system and retrieve your requisition at a later time, or, you can proceed with completing the requisition.

As long as a Requisition ID has been assigned, you will be able to retrieve your requisition at a later time.
Confirmation

The Confirmation page is the final page when processing a Basic Web Requisition where you will be assigned a Requisition ID number. Once a Requisition ID has been assigned, you have the option to continue with your Requisition or exit the system and process the requisition at a later time.

Available on the Confirmation page is the Check Budget and the Approval Notifications. The Preferred Approver fields will become available once a Check Budget processes with a status of Valid. After comments are entered and Preferred Approvers are chosen from the available listing, clicking Submit will send an email notification to your Preferred Approvers.

Check Budget

The Save & Preview approvals process builds the accounting entry to prepare for the Check Budget process. This check point verifies necessary information is valid on your requisition to proceed to the Check Budget process.

The Check Budget verifies the Project ID entered has sufficient funds (for budget period listed) to cover the total cost of the items on the requisition.
If your requisition passes the Check Budget process, indicated by a Budget Status of Valid, you will then be able to select your Preferred Approvers and **Submit** your requisition.

![Confirmation](image)

**Confirmation**

- **Requested For:** Mendoza Michelle Marie
- **Requisition Name:** 09 APRIL7
- **Requisition ID:** 0000544436
- **Business Unit:** HSCSA
- **Priority:** Medium
- **Budget Status:** Valid
- **Number of Lines:** 1
- **Total Amount:** 263.35 USD
- **Comments To Approver:**

**Preferred Project Approver:**

- **Preferred Department Approver:**

**Requisition Approval**

**Requisition Approval Notifications**

There are two approver roles in PeopleSoft: **Department Approver** and **Project Approver**. Both the Department and Project Approver roles must approve a requisition before it can be processed into a purchase order.

Departments determine who will approve a requisition as Department Approver and Project Approver by setting up persons within the department in these approver roles. The Project Approver is the authorized signature for the requisition, while the Department Approver is a reviewer. Either, or both, can **approve** or **deny** the requisition.

If the requisition is denied, the Requester will receive an e-mail notification from the approver who denied the requisition, along with any comments the approver entered. The Requester will also receive e-mail when an approver approves the requisition. If a requisition has not been approved within 24 hours, an escalation notification will be routed to the Requester.
A Requester must notify two persons to approve the requisition. If the Requester will be approving in one of the approval roles, the Requester still needs to select their name from the Preferred Approver field.

Once the requisition has a Budget Status of Valid the Comments to Approver, Preferred Project Approver, and Preferred Department Approver fields become available.
Comments entered will be viewable to both the Preferred Project Approver and Preferred Department Approver. To select a Preferred Project and Department Approver, click the Look Up icon for each.

When Preferred Approvers have been selected, click the **Submit** pushbutton. The Preferred Approver fields and the Submit button will be grayed out. A notification with request for approval will be sent to the selected Preferred Project and Preferred Department Approvers.
An email will be sent to the Requester once the requisition has been either, approved or denied. If no action has been taken by the approvers within 24 hours, an escalation email will be sent to the Requester alerting them that no action has been taken and the requisition is still pending approval.

Keep in mind: If the Submit button is not clicked, the Requisition will not be available for approval.

**Preferred Approvers must be assigned and the Submit button must be clicked.**

*Check Budget pre-encumbers the total dollar amount of the requisition, essentially setting aside this dollar amount so that it cannot be spent for other purposes.*

*Until you are absolutely certain your requisition is complete and that you are committed to purchasing the items, you should not ‘Submit’ your requisition.*
Chapter 3
Approval Scenarios

A Requester must notify two persons to approve the requisition. If a Requester is also in the approval role AND will be approving the requisition, he/she must select his/her name from the Preferred Approver lists. Various approval scenarios are shown as examples.

Approval Scenario 1: When a Requester is Only a Requester
If the Requester who completes the requisition is neither in a Department Approver role nor a Project Approver role, the Requester will need to notify another person(s) to approve the requisition. Depending upon how a department has set up its approval roles, the Requester may notify two separate persons, or a single person who has both the Department Approver and Project Approver roles.

The Requester should begin selecting a Preferred Project and Preferred Department Approver to approve the requisition. This can be completed as soon as the Requester receives a valid budget check for the requisition. The Requester may include a comment to the Preferred Project and Preferred Department Approver. An email will be sent to both the Project and Department approver once Submit is selected.

If the requisition does not have a Budget Status of Valid, the Comments, the Preferred Approver fields and the Submit button will not be available.

The comment you enter here is seen by both Preferred Project and Department Approver.

Preferred Project Approval: From the menu, click the Preferred Project Approver Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from.

Preferred Department Approval: From the menu, click the Preferred Department Approver Look Up icon. This will cause the Approval Search Results screen to populate with list of available approvers to select from.
Submit: When optional comments are entered and Preferred Approvers have been selected, click the pushbutton.

An e-mail notification is sent to the Preferred Project and Preferred Department Approvers.

Clicking SUBMIT sends notice to your Preferred Approvers. If SUBMIT is not clicked the requisition will still not be available for approval action.

Approval Scenario 2: When a Requester is also approving as Department Approver
When a Requester is in a role of Department Approver, the Requester must choose his/her own self as the Preferred Department Approver and complete the Department Approver action. The Requester must then notify a Project Approver using the same steps outlined in Approval Scenario 1. The steps the Requester must complete are as follows:

Comments: If desired, include a comment to the Preferred Project and Department Approver. An email will be sent to both the Project and Department approver when Submit is selected.

Specify oneself as Department Approver: From the menu, click the Preferred Department Approver Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select his/her own name from the approver list.
**Notify a Project Approver:** From the menu, click the Preferred *Project Approver* Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from.

**Submit:** Click Submit when both approvers have been selected.

**Approval Scenario 3: When a Requester is also approving as Project Approver**
When a Requester is in a role of Project Approver, the Requester must choose his/herself as the Preferred Project Approver and complete the Project Approver action. The Requester must then notify a Department Approver using the same steps outlined in Approval Scenario 1. The steps the Requester must complete are as follows:

**Comments:** If desired, include a comment to the Preferred Project and Department Approver. An email will be sent to both the Project and Department approver once Submit is selected.

**Specify oneself as Project Approver:** From the menu, click the Preferred *Project Approver* Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select his/her own name from the approver list.

**Notify a Department Approver:** From the menu, click the Preferred *Department Approver* Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from.

**Submit:** Click Submit when both approvers have been selected.

**Approval Scenario 4: When a Requester is in Both Approver Roles**
When a Requester is the role of Project Approver and Department Approver, the steps the Requester must complete are as follows:

**Comments:** If desired, include a comment to the Preferred Project and Department Approver. An email will be sent to both the Project and Department approver once Submit is selected.

**Specify oneself as Department Approver:** From the menu, click the Preferred *Department Approver* Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select his/her own name from the approver list.

**Specify oneself as Project Approver:** From the menu, click the Preferred *Project Approver* Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select his/her own name from the approver list.

**Submit:** Click Submit when both approvers have been selected.
Approval Scenario 5: When a Requester is an Approver, but needs an approver other than themselves
When a Requester is in a role of Department Approver or Project Approver, but needs additional approval on a requisition from a different approver in the department, the steps the Requester must complete are as follows. This scenario would be necessary for auditing purposes where a Financials user should not be in the role of a Requester and both Approver roles.

Comments: If desired, include a comment to the Preferred Project and Department Approver. An email will be sent to both the Project and Department approver once Submit is selected.

Preferred Project Approval: From the menu, click the Preferred Project Approver Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select the desired alternate approver.

Preferred Department Approval: From the menu, click the Preferred Department Approver Look Up icon. This will cause the Approval Search Results screen to populate with a list of available approvers to select from. The Requester would select the desired alternate approver.

Submit: Click Submit when both approvers have been selected.

Approval Scenario 6: When a Basic purchase requisition needs Environmental Health and Safety (SAF) Approval
When a requisition is checked as Radioactive/Hazardous, the Requester will still send notification to both the Department Approver and Project Approver. When the requisition is approved by both approvers, a system generated email will be automatically sent to Environmental Health and Safety for approval. **Notification does not have to manually be sent to EHS.**

Comments: If desired, include a comment to the Preferred Project and Department Approver. An email will be sent to both the Project and Department approver once Submit is selected.

Preferred Project Approval: From the menu, click the Preferred Project Approver Look Up icon. This will cause the Approval Search Results screen to populate with list of available approvers to select from.

Preferred Department Approval: From the menu, click the Preferred Department Approver Look Up icon. This will cause the Approval Search Results screen to populate with list of available approvers to select from.

Submit: Click Submit when both approvers have been selected.
Chapter 4
Special Situations-Basic Purchase Requisitions

Resolving Problems with Check Budget

**Problem:** Your requisition does not receive a Check Budget Status of Valid.

![Windows Internet Explorer]

**Possible Causes:**
1. The Project ID you entered on your requisition has insufficient funds for the budget period you entered on the requisition.
2. The Project ID you entered on your requisition has expired.
3. There are issues with the setup of the budget category for the Project ID you entered on the requisition.

**Solution:**
1. To verify your project id has sufficient funds, access the Project Budget Inquiry within Inquiries in the Portal Menu. If you do not have access to Project Budget Inquiry, contact the ACE of your department.
2. To verify the project id has not expired, check its expiration date. Click the Look Up icon from the Project/Grant field on the Requisition Defaults page and search for the Project ID you entered on your requisition. View the Project End Date to determine whether the project id can still be used.
3. The source of funds will determine who to contact for assistance regarding issues with the setup of a project budget category. For projects relating to sponsored programs such as research grants and drug studies, contact the Office of Sponsored Programs. For other sources of funds, contact the Office of Accounting.
Approvers are not assigned to a Project ID or Department

**Problem:** Approvers are not listed within Project Approver or Department Approver search list

**Possible Causes:**
1. An approver has not been assigned to a Project ID or a Department ID

**Solution:**
1. Contact the ACE of the department the project id is assigned to. You will need to copy the requisition or create a new requisition
2. To verify the department the project id is assigned to:
   - HSC Custom Components → Self Service Inquiries → Project Chartfield
3. Please call the DCATS office (567-7777, option 5) for assistance identifying the departmental ACE
Line Comments

When typing the information for the description for a line item, you may enter up to 254 characters in the *Item Description field. The Item Description field aligns text to the right margin during entry of a requisition, making it impossible to read long item descriptions while the requisition is being added.

The field does left-align the text after the requisition has been saved and then retrieved again.

If you know you have a lengthy description for a line item, you should type a basic high-level description in the Item Description field and enter lengthy details in the Additional Information field.

Additional information comments print on the requisition immediately below the line with which it is associated.
Creating a Template

Creating a Template will allow you to choose items entered into a Basic Requisition and place them into a Template for future use. A Template will remain within your profile history until it is deleted by you.

The Template you create can be helpful when ordering a common list of items. Instead of re-entering information and item specifics, you may add the Template to the Requisition and adjust as necessary.

Remember, when selecting items to add to an existing Template, the total quantity listed will be placed as the default for that item.

To create a Template, requisition line items must be entered. To place items into a Template, follow the steps listed below:

1. From the **Review and Submit page**, select the line items you would like to place into a Template.

2. Click on **Add to Template(s)**

3. You will be directed to the **Add Selected Items to Template(s) page**

4. Enter a **Template Name**

5. Enter a **Description**

6. Click **OK**

Your template will now be available for future use when generating Basic Requisitions.
Adding Additional Items to a Template

When a Template is created, it will remain in your profile history. As you create Requisitions, it is helpful to update current Templates with new items you may find useful or important.

To add line items to an already existing Template:

1. From your Requisition, navigate to the Review and Submit page and select the line items you would like to place into an already existing Template.

   *Remember, when selecting items to add to an existing Template, the total quantity listed will be placed as the default for that item.*

2. Click on Add to Template(s)

3. You will be directed to the Add Selected Items to Template(s) page

4. Select an available Template (for first time users, you will not have Templates listed)

5. Click OK
Reserving a PO Number

Reserved POs are not used. For more information, please contact the Purchasing Department at 562-6200.

Vendor Prepayments

When a vendor requests payment in advance before shipping the goods, this is referred to as a Vendor Prepayment. When this occurs the Requester will prepare a Basic Requisition, adding Standard Comment PP01 (Prepayment Required) to the requisition on the Review and Submit page. This will alert the buyer in Purchasing that the vendor requires prepayment.

Justification Memo

For some purchases of goods or services, you may feel that only one vendor, or one brand, should be considered when awarding the purchase order. Or the need for an emergency procurement of goods or services which should be exempted from the competitive bid process. In these situations, include the proper Justification Memo with your requisition using the steps below:

Retrieval your Requisition ➔ Review and Submit tab ➔ Justification Memo

- Click the Justification Memo pushbutton on the Review and Submit page
- Select the type of Justification Memo you want to include with your requisition by clicking the appropriate radio button.
- All questions must be completed when selecting a Justification Memo or you must denote a response of N/A (not applicable) if the question does not apply. If any question is left unanswered, you will not be able to save the requisition. Once you have completed all questions, click on Continue to ensure your responses are saved with the requisition.
If you decide you do not need to include a memo after clicking the Memo pushbutton, check the “None” option and return to the requisition.

There is no ‘Un-do’ for the None radio button! If you have previously entered a Justification Memo and saved it with your requisition then click the None radio button, do not save your requisition. Immediately click the menu option Manage Requisition and retrieve your requisition again.
If you include an **Emergency** justification with your requisition, you must change the *Priority: to High on the Requisition Defaults tab to alert the Purchasing Department the requisition needs priority handling.

**Radioactive/Hazardous Materials**

If you are preparing a requisition which includes radioactive and/or hazardous materials, your requisition requires the approval of Environmental Health and Safety (EHS). Through UTHSCSA policy, all Radioactive or Hazardous materials must be approved through Environmental Health & Safety. To access the Requisition Defaults page, follow the steps below to check off the Radioactive/Hazardous Checkbox:

1. **HSC Custom Components** → **Create a Requisition** → **Requisition Defaults** → **Click Rad/Haz checkbox**

- Click the **Radioactive/Hazardous** checkbox on the Requisition Defaults page. This flags your requisition to Environmental Health and Safety. When the Project and Department Approver have approved the requisition, a notification will automatically be forwarded to Environmental Health and Safety (EHS).
The below snapshot shows the Project Approval as Pending and the Additional Approvals as Not Routed.

When the Project Approver approves the requisition, the Additional Approval will show Pending. When Environmental Health and Safety (EHS) have approved the requisition, the status will show Approved.

The below snapshot shows both Approvers have approved the Requisition and now the Additional Approvals is pending. This indicates a notification has been sent to EHS.
Suggested Vendor Not in Vendor File

If a Requester wants to specify a suggested vendor on the requisition and searches but does not find the vendor, there are 2 steps which must be followed during the creation of a requisition:

1. Type UNKNOWN into the Vendor ID field
2. Select Std Comment VN01 from the Standard Comments and complete the information

Requisition Defaults
Enter UNKNOWN as the vendor name. You can either search for the Vendor, Unknown, using the Look Up icon, or type UNKNOWN into the Vendor ID field.

Review and Submit
The Requester will select Standard Comment VN01, Request to Add Vendor. This will default reminder text into the Header Comments field for the Requester to complete. It is recommended the requester provide detailed information to assist the buyer when contacting the vendor.
When Purchasing receives the requisition, they will research the vendor to make certain they were not overlooked by the Requester. If no vendor is found and the suggested vendor will be used, the Purchasing Department will contact the vendor. If the vendor is awarded the order, they will be added to the vendor file after certain required information is provided to the University.

Chapter 5
Manage a Requisition

After a requisition has been saved, you can review the requisition or make necessary changes to the requisition by using the menu option, Manage Requisitions. A Requisition ID must be assigned before you can retrieve a Requisition for viewing. Requisitions with a status of Open, Pending or Approved can be edited if the requisition has not been sourced to a Purchase Order (PO). If a requisition cannot be edited, a message window will display preventing the edit.

Examples of situations when a Requester might use this menu option include:

- The Requester creates a requisition but decides to finish it later
- The Requester already submitted the requisition to approvers, but needs to make edits
- You want to view a requisition, but changes are not needed
- You complete a requisition and later decide additional information is needed
- The requisition is denied by an approver and corrections are needed
- You want to Cancel your requisition
- You want to Copy your requisition

Retrieve a Requisition

When retrieving a requisition the below path should be followed:

eProcurement ➔ Manage Requisitions ➔ Search for Requisition
Search for your requisition using the information below.

- **Requisition ID**
- **Requisition Status** (e.g. Pending Approval, Approved, Open, etc.)
- **Entered By & Requester** – the operator ID of the operator who first entered the requisition.
- **Requisition Name** – if a personalized name/title was entered in the Requisition Defaults page, it can be used to search for a requisition
- **Requisition Date** – enter a date in mmddyy format
- **Vendor ID** – Enter a Vendor ID number to include all leading zeros

1. Enter a single search criterion (Requisition ID is preferred), or combine search criteria to limit the list of requisitions found by the search.
2. Click [Search] to view a listing of requisitions.

If you do not have access to information you are searching for, you will see the below warning: *The Requester specified has no Requisitions.*
To view additional information regarding the requisition, expand the **Requisition Lifespan** by clicking the Expand icon.

The Requisition Lifespan highlighted below, shows an example of a Requisition which does not contain a Budget status of Valid and has a status of Open.

To review your requisition, the Req Quick View link is available, or click the Line item information to view comments regarding the requisition.
Retrieve a Requisition to Edit

A requisition which **has not been sourced to a Purchase Order or given an RFQ** can be edited, even if it has a Check Budget of Valid or been approved. Requisitions having statuses of **Open, Cancelled, Denied, Approved or Pending** can be updated.

If a Requisition has a valid Check Budget and has been approved, it can be edited. If a requisition is denied, the Requester will need to make changes. In many cases these changes will necessitate that the Requester Check Budget and Submit to the Preferred Approvers again.

Prior to a Check Budget, none of the Project ID’s budget dollars are pre-encumbered; however, clicking Check Budget causes budget dollars to be pre-encumbered. This creates the Accounting entries, which if not properly changed by the system, would result in Project balances being inaccurate.

When editing an approved requisition which already has pre-encumbered funds, it is important to Check Budget and Notify Preferred Approvers again. This action will automatically adjust funds to reflect the new dollar amount. The dollar amount will not be pre-encumber twice, but adjusted.

To retrieve a requisition to update, follow the steps listed below:

1. Search for your requisition
2. To edit, select the **Edit Requisition** option
3. Click Go
If a Requisition has been previously approved, the below message will display warning you that making changes will re-start the approval process, requiring the Approvers approve the requisition.

Click OK to proceed with Editing your Requisition

If a Requisition is pending approval, the below message will display warning you that making changes will re-start the approval process, requiring the Requester to re-submit the Requisition to the approvers.

Once the requisition is saved, has a Valid Budget status and the Preferred Approvers have been notified, the requisition should be submitted. An e-mail notification will be sent to the Preferred Approvers to approve or deny the requisition.

Tip: Clicking Submit allows the Preferred Approvers to be notified. If Submit is not clicked, the Requisition will not be available for Approval.
Copying a Requisition

A Requester has the ability to copy any requisition that falls under their designated access. For example, if a Requester has access to T6700, they are allowed to copy any requisitions which have been created with a T6700 PID.

To copy a requisition, follow the steps below:

*eProcurement ➔ Manage Requisitions ➔ Search for Requisition*

1. Search for your requisition
2. Choose the <Select Action> option **Copy Requisition**
3. Click **Go**
4. Complete all required requisition fields and process the requisition

Most, but not all fields from the source requisition will be copied into your new requisition. Be sure to closely review the pages and make any necessary changes. Make edits as necessary to the Requisition Defaults and the Add Items and Services page.

Once the requisition is saved, has a valid Budget status and the Preferred Approvers have been notified, the requisition should be submitted. An e-mail notification will be sent to the Preferred Approvers to approve or deny the requisition.

**Information Message**

When copying a requisition, there is a possibility that during the requisitioning process, line items were deleted or cancelled. In the event a copied requisition previously had line items canceled or deleted, a warning message will display. This is to inform the Requester line items were cancelled or deleted from the source requisition.
The example below informs the Requester the original requisition (Req) contained 2 lines, but only 1 line has been copied into the new Req.

![Image of warning message]

### Canceling Entire Requisitions

A requisition should be cancelled in the event it is no longer needed. Requisitions which have at minimum been saved, can be cancelled. Cancelling a requisition will stop the requisition cycle and reverse the pre-encumbrance, therefore returning the desired amount of funds to the Project budget.

If the requisition has been submitted and approved, the Cancel option will depend upon whether or not a Purchase Order (PO) has been dispatched. If a Purchase Order has been dispatched, canceling the requisition will not be an option.

If a Requisition ID has not been assigned to the requisition, exit the session without saving and the requisition will not be available for retrieval. However, once a requisition has been saved and a Requisition ID assigned, the requisition must be cancelled if it is no longer needed.

**tip** If you need to change the Project ID, edit the requisition and make the adjustment. Updating the Project ID is allowed.

To Cancel a requisition, follow the steps below:

1. Search for your requisition
2. Choose the <Select Action> option Cancel Requisition
3. Click Go
4. Confirm the Cancellation
Confirm the requisition to be cancelled by clicking [Cancel Requisition] in the new window.

Clicking the Expand icon will display the Requisition Lifespan showing a time stamp of when the requisition was Cancelled and the domain id of the person who Cancelled the requisition.

Once a requisition has been cancelled, it will remain available in the history for approximately one day. A Cancelled requisition can be re-opened for editing immediately after it is cancelled. Once a Cancelled requisition is processed and funds are reversed, the status of the requisition will display Complete. At this point in the process, the Requisition cannot be re-opened.

Cancelled requisitions and requisitions with a status of Complete can be copied.
Updating a Cancelled Requisition

A requisition which has been cancelled will show a status of Complete the next business day. However, a requisition which has been cancelled can be updated, only if the status has not processed into Complete. This would require the Requester to update a cancelled requisition the same day it was cancelled.

To update a cancelled requisition, a <Select Action> option labeled Re-Open is available. Most fields within the requisition will be available for editing.

When updating a Cancelled requisition, follow the steps below:

*eProcurement → Manage Requisitions → Search for Requisition*

1. Search for your requisition
2. Choose the <Select Action> option **Re-Open**
3. Click **Go**

4. A page with the requisition information and an information message, will display.
5. Click the **Reopen Requisition** button. The requisition is now available for editing.

6. Search for your requisition

7. Choose the option **Edit Requisition** using <Select Action>

8. Edit the following information on the requisition as necessary:
   - Project ID
   - Line Item Information
   - Quantity
   - Price
   - Vendor Information

Once the requisition is saved, has a valid Budget status and the Preferred Approvers have been notified, the requisition should be submitted. An e-mail notification will automatically be sent to the Preferred Approvers to approve or deny the requisition.

**Delete Requisition Lines after Approval Notifications**

If a requisition has not been sourced to a Purchase Order (PO), the Requester can delete a line on the requisition. Following the Requester’s deletion of a line, the Requester will need to **Check Budget** and **Submit** the requisition for approval to the Preferred Approvers.

To Delete lines from a requisition, follow the steps below:

**eProcurement ➔ Manage Requisitions ➔ Search for Requisition**

1. Search for your requisition
2. Choose the <Select Action> option **Edit Requisition**
3. Click **Go**

If a Requisition has been approved, the below message will display warning you that making changes will re-start the approval process, requiring the Approvers approve the requisition again.
4. Navigate to the Review and Submit page, select the line(s) you would like to delete.

5. A warning message will display. Click Yes.

6. A second warning message will display. Click OK.

When the requisition is saved, has a Valid Budget status and the Preferred Approvers have been notified, the requisition should be submitted. An e-mail notification will be sent to the Preferred Approvers to approve or deny the requisition.
Cancel a Line after Approval Notification

Canceling a line is similar to deleting a line; it places funds back into the Project budget and does not order the item. The Cancel Line option is beneficial by showing what was going to be ordered. The Cancel Line option will be available only after a Requisition is submitted for approval. Prior to submitting for approval, the line must be deleted.

To Cancel a line, access the Requisition Life Span from PeopleSoft Financials:

*eProcurement → Manage Requisitions → Search for Requisition

1. Search for your requisition
2. Click the Expand Icon

From the Requisition Lifespan each line will contain a Red ‘X’ to the right, a Cancel Line option. By clicking the Cancel Line Option, the Line Item will be cancelled from the Requisition.

3. Click the Red X for the line which needs to be Cancelled.

The line status will now display Canceled and the Budget Status of the Requisition will display Not Chk’d.

4. Choose the <Select Action> option Edit Requisition
5. Click Go
Navigate to the Confirmation tab; continue with processing a Check Budget. **You will not need to re-submit the Requisition to your Preferred Approvers.** Once the Check Budget is selected, the approver fields will remain grayed out.

**Confirmation**

- Requested For: Carranco, Diane S
- Requisition Name: Desk and Computer
- Requisition ID: 0000599225
- Business Unit: HSCA
- Priority: Medium
- Budget Status: Valid
- Number of Lines: 2
- Total Amount: 578.00 USD
- Preferred Project Approver: LENOW
- Preferred Department Approver: CARRANCO

**Requisition Approval**

Within the Manage Requisitions page, the line status will display Cancelled and the Budget will now display Valid.
How to place a Requisition Status to Open

Placing a requisition with a status of Open allows a requisition to be available for editing and prevents approvers from viewing the requisition within the Approval screens. Setting a requisition’s status to Open can only be processed for requisitions which have a status of Pending (i.e. one or more approvals are pending) or Approved.

1. For requisitions with an Approved status, this can only be done on requisitions that have not been sourced. **Sourcing** refers to the point at which the requisition lines are being processed into a PO or RFQ (depending on the requisition type). When lines are sourced for a General Stores requisition, you must contact General Stores for assistance. For a Basic or Direct Connect requisition, you must contact PurchAdmin@uthscsa.edu for assistance.

2. Search for the requisition within Manage Requisitions.

![Manage Requisitions](image)

**Note:** No lines have been sourced for this requisition because the requisition hasn’t yet been approved. If approved, verify the appropriate icon in the requisition lifespan is still gray. For a General Stores requisition, confirm the Inventory icon. For a Basic or Direct Connect requisition, confirm the Purchase Orders icon is still gray.
3. From the Select Action box, click **Edit Requisition**, then click the **Go** button.

4. The following message appears. Click **OK**.

5. Click **Requisition Defaults**.
6. Click the **Continue** button.

7. The following message appears. Click **Yes**.

   ![Message to add a new line](image)

   Do you want to add a new line? (20302,23)

   **Click Yes** to re-trigger approvals for this requisition. Click 'No' to Submit the requisition.

8. Leave this page blank, click **Review and Submit**.
9. Click the **Save & Preview Approvals** button located at the lower left corner of the Review and Submit page.

10. The following message appears. Click **OK**.

Do not continue with submitting the requisition for approval. You can exit the system or to confirm the changed status, access Manage Requisitions.

11. The requisition will have an **Open** status. Go to Manage Requisitions to confirm.
How to Retrigger Approval Notifications

When a requisition is submitted for approval, the approvers chosen by the Requester are known as Preferred Approvers. They are the intended approver for the requisition and will receive an email notification requesting action be taken.

If one of the approvers does not receive the email notification, the Requester can retrigger the approval notification that was submitted.

When the approval notification is retriggered, a new email notification will be generated to the new Preferred Approvers chosen. To retrigger Approval Notifications, follow the steps below:

1. Search for your requisition
2. To edit, click the **Edit Requisition** option
3. Click Go

You will be directed to your Requisitions Review and Submit page. From inside the Requisition, follow the steps below:

4. Click the Requisition Defaults link
5. Click the Continue button on the Requisition Defaults page

A message will display. To re-trigger approvals for this requisition, click Yes.

*tip* 
*If No is clicked, you will not be able to select different approvers.*

6. Click the Review and Submit link
7. Click Save & preview approvals

The Confirmation page will display. The Requester will be able to Check Budget, enter comments to the Preferred Approvers and select the Preferred Project or Department approvers.
Chapter 6
Printing a Requisition/Purchase Order

The requisition printing process in PeopleSoft will generate an e-REQ (electronic Requisition) that is sent via e-mail to the person requesting it. The email has an attachment of the requested requisition or purchase order. The attachment can be viewed and printed using the free Adobe Acrobat® Reader™ that is included as part of the UTHSCSA standard desktop configuration.

An e-REQ can be requested as soon as the requisition has been successfully saved and assigned a requisition number. Therefore, an e-REQ can be requested for a partially completed requisition. A user will only be able to request an e-REQ for requisitions or purchase orders prepared under their granted access, without regard to who prepared or approved the requisition.

Requesting an e-REQ Requisition Print or Purchase Order

To access the Print a Requisition or Print a Purchase order link, follow the steps below:

*HSC Self Service Inquiries ➔ Print a Requisition / Print a Purchase Order*

1. Search using one of the available search parameters
**Business Unit**: Do Not Change

**Requisition ID**: Used to search for a specific REQ ID

**Status**: Used to search for REqs with a specific status

**Entered By**: Used to search by Requester (the individual who generated the requisition)

**Department**: Used to search by a specific Dept. ID

**Requisition Date**: Used to search for a requisition based on the date it was created

**Vendor ID**: Used to search for a requisition by the vendor

**Project**: Used to search for a requisition based on the project id used for the purchase

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To search for a requisition by ID number, you must enter the leading zeros. You cannot use a wildcard when searching the ID number. Enter the ten digit requisition ID number.

![Requisition ID: 0000123456](image)
To retrieve a list of all requisitions or purchase orders you have access to, leave the fields blank, and click the **OK** pushbutton. The list will be sorted by most recent first. You can change the default sort order for any column by clicking the column’s heading.

2. Select the requisition(s) or purchase order(s) you want by clicking the box in the Line Select column. Then, click the **Send** pushbutton. An email will be sent to your Outlook inbox.

3. You will see a message similar to the example below:

   **For Requisitions:**
   
   ![Windows Internet Explorer](image)
   
   Your request is being processed. You will receive the requisition(s) via e-mail momentarily. (0,0)

   ![OK](image)

   **For Purchase Orders:**
   
   ![Windows Internet Explorer](image)
   
   Your request is being processed. You will receive the Purchase Order(s) via e-mail momentarily. (0,0)

   ![OK](image)
You will receive an email message with a pdf attachment, which will look similar to the illustration appearing below.

4. Double-click the PDF attachment appearing in the e-mail message. You may be presented with a message. Click the option to Open it and then click the **OK** pushbutton.

The attachment will open using Adobe Acrobat® Reader™.

To print the requisition or the purchase order, click the **Print** button on the Adobe Acrobat® Reader™ toolbar.
Chapter 7 HSC Self Service Inquiries

The HSC Self Service Inquiries provides view only access to 16 different inquiries. All 16 inquiries are available to all PeopleSoft Financials Users. The only inquiry which requires prior approval by the departmental ACE is the Project Budget Inquiry.

Within HSC Self Service Inquiries, three additional inquiries are available:

1) Blanket Travel Inquiry – this inquiry provides a public listing, by department, of all individuals authorized for Blanket Travel during a fiscal year.
2) Historical Req Approval Inquiry – provides access to the requisition approval history for requisitions created prior to December 2, 2010.
3) Offsite Property Inquiry – provides a listing of UTHSC property which is assigned to employees

The next two sections will review two powerful Self Service Inquiries available to front office users: Procure-To-Pay and Project Budget Inquiry.

Procure-To-Pay Inquiry

The real power of this inquiry is in its ability to perform drill-downs on the search results AND provide multiple quick views in one area. This Inquiry will show the PO number assigned to the requisition, and any receivers, vouchers, or payments relating to the purchase order.

To access the Procure to Pay Inquiry, follow the steps below:

1. Begin by selecting the Doc Type you are searching for. If you are searching for a Requisition you would select REQ.
2. Enter the requisition number (with preceding zeros) in the Document ID field. If searching for a Purchase Order, keep in mind, the information will not be available until Purchasing has completed processing the order.
3. Click the **Search** pushbutton

**Tips when searching for documents:**

- When searching for a **REQ** (Requisition), you must enter 10 characters, including all leading zeros.
- When searching for a **PO** (Purchase Order), you must enter 10 characters, including all leading zeros.
- When searching for a **VCHR** (Voucher), you must enter 8 characters, including all leading zeros.
- When searching for a **PYMT** (Payment), you must enter 6 characters, no leading zeros are including in this search.

Each time you search for a different document, you must click on the **Search** button to refresh the information shown. The screen will not automatically update.
To view a detailed image of the Requisition, Purchase Order, Voucher ID or Check Number, click on the pushbutton to the right of the document number. The pushbutton will be grayed out if:

- A purchase order has not yet been assigned to the requisition
- A voucher has not been processed and sent to Accounting
- A payment has not been made on this order

**Project Budget Inquiry**

Though all Web Req users will see the menu option for the Project Budget Inquiry on their portal menu by default, **access must be granted by the departmental ACE** on an individual basis using the ACE Tools Requisition Security, before an individual can inquire on a project id.

To access Project Budget Inquiry, follow the steps below:

1. Enter your Project ID number. You may also search using the wildcard (%) on this page
2. Click **Search**

This page shows real-time balances for the Project ID.
The data appearing in the inquiry does **not** include the current day’s activity.

- Balances shown are as current as COB the *previous* business day.
- The Last Activity Date indicates the last date for which a transaction was posted to the general ledger for the project.

To view another project id, click on the Portal Menu option, Project Budget Inquiry. You will see the search Tab again. Insert the project id number and click on the **Search** pushbutton.
Chapter 8
Support Departments

Below is departmental information for the appropriate requisition type:

<table>
<thead>
<tr>
<th>For this type of requisition...</th>
<th>You should contact...</th>
<th>At this number...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic purchase requisition</td>
<td>Purchasing Department</td>
<td>(210) 562-6200</td>
</tr>
<tr>
<td>General Stores requisition</td>
<td>General Stores</td>
<td>(210) 567-5982</td>
</tr>
<tr>
<td>Travel requisition</td>
<td>Travel Services</td>
<td>(210) 562-6216</td>
</tr>
<tr>
<td>Questions and Concerns</td>
<td>DCATS</td>
<td>(210) 567-7777 Option 5</td>
</tr>
</tbody>
</table>
Chapter 9
Online Training

If you would like training at your desk or a refresher, please visit our online training tool, UPK. You will find all scenarios available when entering a requisition, which can be viewed at any time.

If you have questions while viewing the training video, please contact DCATS at 210-567-7777, option 5.

Online Training Link:
http://upk.uthscsa.edu/PSFinancials/Publishing%20Content/PlayerPackage/toc.html
APPENDIX
JOB AID: ePro Basic Requisition

The below Job Aid is an **outline** to follow when completing a requisition. For more detailed information, please refer to your process guide, which includes snapshots to better understand a process.

Creating a Basic Requisition is comprised of 4 primary pages. Each must be completed before you can proceed to the next page.

1) **Requisition Defaults** -- First page which contains the type of requisition, Vendor ID, Project, Shipping Information, Due Date, Fiscal year, Contact and Delivery Information.

2) **Add Items and Services** -- Second page where you will enter the items needed to be ordered.

3) **Review and Submit** -- Third page where you will enter comments, make edits to line items entered & Save the requisition.

4) **Confirmation** – Final page where a Check Budget and Approval Notifications will occur.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log onto the PeopleSoft Financials Management page via the UTHSC Portal</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <a href="#">eProcurement</a> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <a href="#">Create Requisition</a> link.</td>
</tr>
<tr>
<td>4.</td>
<td>The first page is the <strong>Requisition Defaults</strong> page. All <em>required</em> fields must be completed before selecting the <strong>Continue</strong> button.</td>
</tr>
<tr>
<td>5.</td>
<td><strong>Requisition Name</strong> can be used to enter information which can help you retrieve your Requisition, similar to a Requisition ID (<em>this is a 30-character field</em>). Click in the <strong>Requisition Name</strong> field. Enter a name for the requisition. This field is optional. If you leave it blank you will still be assigned a requisition Id.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Requisition Type</strong> list.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 7. | The **Requisition Type** you choose determines specific information on proceeding pages.  
   *(Note: Once a Type has been selected and you navigate to the next page, the type **cannot** be changed).*  
   Click **BASIC REQUISITION** |
| 8. | **Priority** is defaulted to Medium.  
   If High is selected, additional delivery charges up to $250 may be incurred. |
| 9. | Click the **Look up *Vendor ID (Alt+5)*** button. |
| 10. | Click the **Short Vendor Name** list. |
| 11. | Selecting **contains** acts as a wild card, and all vendors with the name/phrase you type in the field will be retrieved.  
   Click **contains** |
| 12. | Click in the **Short Vendor Name** field. |
| 13. | A portion of the vendor’s name should be entered into the **Short Vendor Name** field.  
   Enter a portion of the vendor’s name you are searching for |
<p>| 14. | Click the <strong>Look Up</strong> button. |
| 15. | Scroll through your results and select your vendor |
| 16. | To view additional addresses for the vendor, click the <strong>Look Up (Alt+5)</strong> button. If you would like to use a different address, please make the appropriate change. |
| 17. | Click in the <strong>Project</strong> field. |
| 18. | Enter the Project ID to be charged for this order, into the <strong>Project</strong> field. |
| 19. | Click the <strong>Look up <em>Ship To (Alt+5)</em></strong> button. Select the campus location your items will be shipped to. |</p>
<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>Look up <em>Fiscal Year (Alt+5)</em> button. Select the current Fiscal Year.</strong></td>
</tr>
<tr>
<td>21.</td>
<td>The Due Date for a Basic Requisition should be future dated, 5-7 business days from today's date. Click the <strong>Choose a date (Alt+5) button. Select a date.</strong></td>
</tr>
<tr>
<td>22.</td>
<td>If the Requester will also be the contact person, click the <strong>Load Contact Information</strong> button.</td>
</tr>
<tr>
<td>23.</td>
<td>Click in the <strong>Deliver To</strong> field. Enter the room and building location the items will be delivered to.</td>
</tr>
<tr>
<td>24.</td>
<td>If the person receiving the items is also the Contact person, click the <strong>Same As Contact</strong> option.</td>
</tr>
<tr>
<td>25.</td>
<td>Once the <strong>Requisition Defaults</strong> page is complete, proceed by Clicking the <strong>Continue</strong> button.</td>
</tr>
<tr>
<td>26.</td>
<td>The <strong>Add Items and Services</strong> page will be used to enter any items to be ordered. To begin, enter a description of an item you will be ordering into the <strong>Item Description</strong> field. (Max: 254 characters)</td>
</tr>
<tr>
<td>27.</td>
<td>Click in the <strong>Price</strong> field. Enter the price of <strong>one</strong> item into the the <strong>Price</strong> field.</td>
</tr>
<tr>
<td>28.</td>
<td>Click in the <strong>Quantity</strong> field. Enter the number of items needed into the <strong>Quantity</strong> field.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>Look up Unit of Measure (UOM) (Alt+5)</strong> button to select a unit of measure.</td>
</tr>
<tr>
<td>30.</td>
<td>A total of 175 Units of Measure (UOM) are available. If the Unit of Measure is unknown, select <strong>Each</strong>. Click in the <strong>Unit of Measure</strong> field. Choose the appropriate UOM.</td>
</tr>
<tr>
<td>31.</td>
<td>If a <strong>Vendor Item ID</strong> is available, please make certain to reference it within the <strong>Vendor Item ID</strong> field.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>32.</td>
<td>Click in the <strong>Additional Information</strong> field. Enter additional information regarding your item here. <em>The more detailed the information, the better.</em></td>
</tr>
</tbody>
</table>
| 33. | Click the **Add Item** button.  
Add Item  
Once the item has been added, the **Requisition Summary** will display the item description, quantity (Qty), unit of measure (UOM), and total dollar amount. |
| 34. | **To add additional items, repeat steps 26-33** |
| 35. | Once you have completed adding items, proceed to the next page by selecting the **3. Review and Submit** link in the upper right.  
3. Review and Submit  
If the **Save & Preview approvals** button is **not selected**, a Requisition ID **will not be assigned**. |
| 36. | If you need to enter comments, they can be entered in the **Header Comments** field.  
To enter **Standard Comments** or a Justification memo, select the available option. |
| 37. | Once comments have been entered into the Requisition, click **Save & Preview approvals** button to save your requisition. |
| 38. | To confirm funds are available for the Project ID being used, click the **Check Budget** button.  
Check Budget  
If the **Save & Preview approvals** button is **not selected**, a Requisition ID **will not be assigned**. |
| 39. | The Budget Status has now been updated to Valid. Comments to your Preferred approvers should go into the **Comments To Approver** field. |
| 40. | Comments entered will be viewed by both **Preferred Project and Department Approvers**. |
| 41. | To specify a **Project Approver**  
click the **Look up Preferred Project Approver (Alt+5)** button  
Select the appropriate approver. |
<table>
<thead>
<tr>
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<th>Action</th>
</tr>
</thead>
</table>
| 42.  | To specify a **Department Approver**  
      | Click the **Look up Preferred Department Approver (Alt+5)** button.  
      | Select the appropriate approver. |
| 43.  | Once the approvers have been selected, click the **Submit** button.  
      | [Submit] |
| 44.  | Notice the Project and Department Approval status has changed from **Not Routed** to **Pending**.  
      | Both the Preferred Project and Department Approvers will receive an email requesting approval action be taken.  
      | If no approval action is taken within 24 hours, an escalation email will be sent to the Requester for follow-up. |
| 45.  | This completes processing a Basic requisition.  
      | **End of Procedure.** |