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 load 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, an Animal 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 all of the following types of requisitions using the PeopleSoft Web Requisition:

- A Travel Requisition
Table of Contents

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

Chapter 1 – Signing onto the University of Texas Health Science Center (HSC) Portal ............... 5

Health Science Center - Portal Logon ...................................................................................... 5
The Financials Management Menu......................................................................................... 7
A Closer Look at the Financials Menu.................................................................................. 8
HSC Self Service Inquiries..................................................................................................... 8

Chapter 2 - Preparing a Travel Requisition ............................................................................. 11

Requisition Defaults............................................................................................................... 12
Adding Requisition Lines ...................................................................................................... 17
Checkout - Review and Submit .............................................................................................. 17
Travel Page ............................................................................................................................ 18
Adding Comments to Your Requisition ............................................................................... 20
Deleting a Requisition Line .................................................................................................. 22
Editing a Requisition Line ..................................................................................................... 22
Saving a Partially Completed Requisition ........................................................................... 23
Check Budget ...................................................................................................................... 24
Preview Approvals ............................................................................................................... 25
Confirmation .......................................................................................................................... 27

Chapter 3 - Approval Scenarios ............................................................................................ 29

Approval Scenario 1: When a Requester is Only a Requester .................................................. 29
Approval Scenario 3: When a Requester is an Approver, but needs an approver other than themselves ................................................................................................................ 30
Approval Scenario 4: When a Foreign Travel requisition needs EC-Level Approval .................. 31

Chapter 4 - Special Situations- Travel Requisitions ................................................................. 32
Resolving Problems with Check Budget……………………………………………………………32
Approvers are not assigned to a Project ID or Department ..................................................32
Adding Additional Items to a Template ..................................................................................33
Suggested Supplier (Employee) Not in Supplier File...............................................................34
No Cost to the Health Science Center..................................................................................35

Chapter 5 - Manage a Requisition .......................................................................................36
Retrieve a Requisition ...........................................................................................................36
Retrieve a Requisition to Edit ...............................................................................................38
Copying a Requisition ..........................................................................................................40
Canceling Entire Requisitions ...............................................................................................41
Updating a Cancelled Requisition ..........................................................................................43
Delete Requisition Lines after Approval Notifications ..........................................................45
Cancel a Line after Approval Notification ...........................................................................46

Chapter 6 - Foreign Travel Requisition ................................................................................49
Requisition Defaults: .............................................................................................................49
Confirmation Page ................................................................................................................49

Chapter 7 - Blanket Travel Authorization ..........................................................................51

Chapter 8 – Self Service Inquiries .......................................................................................53
Procure-To-Pay Inquiry .........................................................................................................53
Project Budget Inquiry .........................................................................................................54
Voucher Quick view ..............................................................................................................55
Printing a Requisition/Purchase Order ..................................................................................56

Chapter 9 – Support Departments ......................................................................................60

Chapter 10 – Online Training 60
Chapter 1 – Signing onto the University of Texas Health Science Center (HSC) Portal

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

Health Science Center - Portal Logon
Enter the web address for the HSC Portal Homepage in the address field of your Microsoft Internet Explorer window – http://inside.uthscsa.edu/

- Log into the HSC Portal logon using your NT User Name (Domain ID) and Password.

After successfully logging into the Portal, a Portal 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.

A new browser window will open and appear blank.

- Click on the PeopleSoft Financials link then click the Financials subfolder link.
The Financials Management Menu

To expand the Financials menu, click Main Menu from the breadcrumbs at the top of the page.

- Click a folder to expand the menu revealing sub-menu options.

- Example: Selecting the eProcurement folder reveals additional options.
A Closer Look at the Financials Menu

HSC Self Service Inquiries
Clicking on HSC Self Service Inquiries causes the menu options 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 Supplier search will list information regarding suppliers the UT Health Science Center has made purchases with. The listing will display general information regarding the supplier 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.
Employee Self Service

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

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

**Employee Project Center**
This menu is not currently being used.

**Travel and Expense Center**
This menu is not currently being used.

**Payment Request Center**
This menu is not currently being used.

**eProcurement**

**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.

**Manage Requisition Approvals**
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 Travel 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.

A travel requisition serves two purposes. The first purpose is to communicate the estimated costs of a trip to an approver, while the second purpose is to authorize a person to leave campus on a trip.

Processing a travel requisition using a generic requisition process, has the advantage of immediately pre-encumbering the total estimated dollar amount of the items included on the lines of the requisition. The costs of items included on the travel page, of which there are only three types, are not pre-encumbered, however. These costs include UPT airfare, prepaid room deposit, and prepaid registration fees. The University is direct-billed by the contract travel agency for UPT airfare and the Accounting Department does a journal entry to charge the appropriate departments’ projects for their respective share of the bill. Prepaid room deposit and registration fees are paid on a purchase voucher. As a consequence, the costs of these items should not be entered on the lines of the requisition. Doing so would result in these costs being inappropriately pre-encumbered.

Processing a Travel purchase requisition involves four basic steps. First, the Requester enters the requisition, specifying the traveler and the travel expenses. Next, the Requester must save and check budget to ensure 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 Travel purchase requisition, the Requester must make the necessary changes. In some cases, the Requester will be required to Check Budget on 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 travel requisition will be held in Travel Services until the trip has taken place.
Requisition Defaults

The Requisition Defaults page is the first page the Requester will complete when adding a requisition. This page contains the REQ type, Supplier 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. **TRAVEL** must be selected when preparing a Travel Web requisition. **When you click Continue, the Requisition Type cannot be adjusted.**

Travel type should be used to specify the type of travel being taken; Foreign, In-State or Out-of-State.
**Priority:** The priority option is not used for Travel, General Stores or Direct Connect requisitions.

**Radioactive / Hazardous:** This is not used for Travel, General Stores or Direct Connect requisitions.

**Supplier ID:** This is a required field. To search for a traveler, click the Look Up icon using the supplier search page shown below. If a suggested traveler cannot be found in the supplier file, contact Accounting to have them add the traveler to the supplier file.

**Short Supplier Name:** You will find it useful when searching for a traveler’s name 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 supplier name click the Look Up button.
All suppliers containing the specified criteria will be displayed in the search results. Select the desired supplier by clicking on the name. The supplier’s ID number will populate in the Supplier ID field and its name and default order location will appear when you tab out of the Supplier field.

**Supplier Location:** A default location of the traveler’s address will populate this field. If a different address is needed, click on the drop-down arrow and select the desired location. If the desired supplier location is not listed, include a comment on the Checkout – Review and Submit page of your requisition to notify the Purchasing Department; they will add the name into the supplier file.

If the Supplier has a location of ACH or SUA, this should be selected as the preferred location. This identifies the Supplier has negotiated direct payment as the preferred method of payment with the HSC.

*Project:* This is a required field. The Project ID is the source of funds to be used to reimburse the traveler. 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 Travel requisition.**
**Ship To:** Travel Requisitions do not have a ship to address, therefore N/A will be defaulted.

**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 the last day of the trip or the end date of the trip.

*If a different end date is entered into the Travel page, the Due Date within Requisition Defaults will reflect the date entered into the Travel page.*

**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:** This is a required field. List the email address (@uthscsa.edu) of the contact person.

**Load Contact Information:** Clicking on this button will automatically load the contact information of the person who is logged onto the UTHSCA portal.

**Deliver To:** Travel Requisitions will not have a deliver to address; N/A will be defaulted.

**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 Ph fields.

**Deliver Name:** Travel Requisitions will not have a deliver name; N/A will be defaulted.

**Deliver Ph:** Travel Requisitions will not have a deliver phone number; N/A will be defaulted.

If 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.
Requisition - Add Items and Services

The second page the Requester will complete when creating a Travel Web Requisition is the **Requisition - Add Items and Services** page. When the Traveler leaves on the trip, expenses may incur which were not prepaid for by the department. **Any items which will be reimbursed to the employee must be listed within the Requisition - Add Items and Services page.**

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

*Item Description*: Type in a clear and basic description of the expenses to be reimbursed to the traveler. Although this field holds up to 254 characters, only 30 characters will be viewable when the requisition is reviewed.

*Price*: Enter the unit price of the total amount of the travel expense. The price remains at zero if there is no charge for the item. You must always attempt to estimate the cost of the item.

  **Note**: It is the Department’s discretion whether an itemization of reimbursed items is preferred, or one line to include the total for all reimbursement items.

*Quantity*: The quantity will always be 1(one) for Travel Requisitions. 1.0000 is the defaulted quantity.

*Unit of Measure(UOM)*: The UOM will always be EA for Travel Requisitions. EA is the defaulted UOM.

**Supplier Item ID**: This is not used for a travel requisition.

**Additional Information**: Any additional information regarding the item being reimbursed 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

When entering items for a travel requisition, you must only list items which will be reimbursed to the employee. To add items to your requisition, complete all required* fields, then click the 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.

The number of items in the shopping cart will increase as items are added to the requisition.

To become familiar with travel rates for In-State, Out-of-State and Foreign Travel, visit the Travel Services website - http://www.uthscsa.edu/business/travel/index.html

Shipping and Handling Charges and Instructions

Shipping and Handling changes do not apply to a Travel requisition.

Checkout - Review and Submit

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

The Travel page located within the Review and Submit page, should be used to list items for the trip which are pre-paid, also the Purpose and Benefit for this trip. The Purpose and Benefit should include the intent and benefit of the trip in detail. All fields in the Description section must be completed. If information is not completed, a warning message will display.

Disposition of work while away: Enter the name of the person who will cover the duties for traveler while he/she is away.

Honorarium received: Click this box if an honorarium or consultant fee will be received. Complete and submit a Request for Approval of Outside Employment, Consultation, or Related Activities form.

Send REQ to Travel Agency: Click this box if the requisition should be transmitted to a contract travel agency. This will reveal a hidden field in which you can specify the contract travel agency.

If this box is not checked, Travel Agencies to select from will not be listed, thus not submitting notice to the travel agency once the Requisition has been approved.

University Paid Travel (UPT) airfare: If UPT will be used, enter amount of airfare, with the ticketing fee.

Travel Agency: This field only becomes visible if a check appears in the Send REQ to Travel Agency field. Click to select a travel agency.

Prepaid registration fee: Enter amount of any registration fee prepaid via a purchase voucher.
Prepaid room deposit: Enter amount of any room deposit prepaid via a purchase voucher.
Country: Enter the destination country for trip. USA is the default.

City: Enter the destination city for trip.

State: Enter the destination state for trip.

Start Date: Enter trip start date.

End Date: Enter trip end date.

*Tip* End date must match Due Date in the Requisition Defaults page. If a different end date is entered in the Description section, the Due Date in the Requisition Defaults page will adjust.

Type: Specify whether the portion of trip designated by start and end dates is business or personal by entering B or P.

Purpose/Benefit: Enter purpose and benefit statement.

If necessary, click the + button to insert additional rows to list trip details. If a portion of the trip is personal, separate the business and personal details by inserting an additional row. Additional rows entered must have consecutive dates on them. You cannot skip days in between rows. A completed Travel page is shown below. Fields circled in red are required.
Once the Travel page has been completed, the **Return to Requisition** link should be selected. You will be directed back to the Checkout - Review and Submit page.

**Adding Comments to Your Requisition**

Comments may be added free from or using Standard Comments.

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 Supplier 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 added using templates provided to aid the Requesters of important details they should provide in the requisition comments.

To enter Standard Comments, follow the below steps:

1. Click the **Standard Comments** button.
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** button to accept the Standard Comment.

The Standard Comment template will populate in the Header comments window. The template text can be edited to accommodate information.

To insert an additional comment(s), select the **Standard Comments** button 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.

A scroll bar will appear on the right side of the comment field. Click the up and down arrows to review all comments.
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.

You will receive a message asking you to confirm the deletion of the line item.

Click the **Yes** button to delete the row; otherwise, click the **No** button.

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

1. From the Checkout – Review and Submit page, click the item description hyperlink
2. You will be directed to the specific line chosen in the Requisition Add Items and Services tab. Enter edits as needed.

3. Click the **Add to Cart** button once edits have been made
4. Continue completing the requisition line items as necessary

**Saving a Partially Completed Requisition**

Before saving a partially completed requisition, certain minimum required fields must be completed. These are shown in the table below. 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><strong>1. Requisition Defaults</strong></td>
<td>All required fields must be completed before proceeding to the next page</td>
</tr>
<tr>
<td><strong>2. Requisition - Add Items and Services</strong></td>
<td>One line item must be entered before proceeding to the next page</td>
</tr>
<tr>
<td><strong>3. Edit - Review and Submit</strong></td>
<td>All required fields in the Travel page must be completed before proceeding to the next page</td>
</tr>
</tbody>
</table>
In order for the system to generate a Requisition ID, you must be on the **Checkout - Review and Submit** page of the Requisition. Click the **Save** button. With the minimum required fields completed, you will be assigned a system generated Requisition ID.

You now have the option to exit the system and retrieve your requisition at a later time from Manage Requisitions, 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 from the Manage Requisitions page.*

**Check Budget**

The **Save** 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 the budget period listed) to cover the total cost of the items on the requisition.

- From the **Checkout – Review and Submit** page click on Check Budget. When your requisition passes the Check Budget process, indicated by a Budget Status of Valid, you will be able to continue completing your requisition.
• Not Budget Checked

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.

Preview Approvals

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

If a Travel Agency was selected on the Travel page, the Travel Services Company selected will not receive a notification until both Approvers have approved the requisition. With flight costs fluctuating from day to day, it is highly important Approvers address Travel requisitions promptly.

Departments determine who will approve a requisition as the Preferred Department Approver and Preferred Project Approver by setting up users 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 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 approver 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 button. The Requester will be returned to the Edit Requisition – Review and Submit page.

Click on the Submit button to complete the process on the requisition. This action will send an email notification to both Preferred Approvers. The Confirmation page will appear. This page will show you a quick view of the information contained in your requisition.

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

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

**Confirmation**

Available on the Confirmation page is the **Budget Status** and the **Approval Notifications**.

An email is sent to the Requester once the requisition has been either, approved or denied by the Approvers. 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.
Chapter 3 - Approval Scenarios

A Requester must notify two persons to approve the requisition. 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 not in a Department Approver role nor a Project Approver role, the Requester will need to notify other users to approve the requisition. Depending how a department has set up its approval roles, the Requester may notify two separate approvers, or a single approver who has both the Department Approver and Project Approver roles.

The Requester should begin selecting a Preferred Project and 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 notification will be sent to both the Project and Department approver when 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 entered in the Comments to Approver box are 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. The Requester would select the desired 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 approver.

Submit: When optional comments are entered and Preferred Approvers have been selected, click the button. An e-mail notification is sent to the Preferred Project and Preferred Department Approvers.
Clicking SUBMIT sends a notice to your Preferred Approvers. If SUBMIT is not clicked the requisition will not be available for approval action and will remain in Open status in Manage Requisitions link.

Approval Scenario 2: When a Requester is also approving in an Approver role

When a Requester is in a role of one of the Approvers, the Requester must choose themselves as the Preferred Approver role they are in, then notify another user to approve in the second Approver role, using the same steps outlines 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 an Approver:** From the menu, click the Preferred Department or Project Approver Look Up icon. This will cause the Approval Search Results screen to populate with list of available approvers to select from. The Requester would select his/her own name from the approver list.

**Notify other Approver:** From the menu, click the Preferred Project or 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 3: 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 once approvers have been selected.
Approval Scenario 4: When a Foreign Travel requisition needs EC-Level Approval

When a Travel Type is checked as Foreign Travel, the Requester will send a notification to both the Preferred Department Approver and Project Approver. When the requisition is approved by both approvers, the EVP Office will approve for the final approval action. Notification does not have to manually be sent to the EVP.

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 once approvers have been selected.
Chapter 4 - Special Situations - Travel Requisitions

Resolving Problems with Check Budget

Problem: Your requisition does not receive a Check Budget Status of Valid.
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 and it is not expired, access the Project Budget Inquiry within Self Service Inquiries.
(2) To verify the project id has not expired, check its expiration date using Self Service Inquiries.
(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. From the drop down list, Approval search results are blank.

Possible Causes:
(1) Approvers have 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. If you do not know who the ACE is, contact DCATS for assistance at (210) 450-0090
(2) Save the requisition to finish at a later time. After the ACE has added approvers to the Project ID and Department ID, click on Manage Requisitions to access the requisition and complete it. See Error! Reference source not found. section for detailed guidance.
Creating a Template

Creating a Template will allow you to choose items entered into a Travel Requisition and place them into a Template for future use. A Template you create will remain within your profile history.

The Template you create can be helpful when trying to locate reimbursement costs for In-State, Out-of-State or Foreign Travel requisitions. Having a Template for each Type of Travel Requisition (In State, Out of State or Foreign) created may help lessen your search time for standard prices.

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 Checkout – 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

Adding Additional Items to a Template

When a Template is created, it will remain in your profile history and cannot be deleted. 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 Checkout – 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. You will have a listing of previously created Templates, select the one you would like to add these items to

5. Click OK

### Add Selected Items to Template(s)

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel</td>
<td>Dallas Conference</td>
</tr>
</tbody>
</table>

**Suggested Supplier (Employee) Not in Supplier File**

If a Requester wants to specify a suggested supplier on the requisition, but does not find the supplier, the Office of Accounting must be contacted. **Do not proceed** with completing your requisition until the Office of Accounting has been contacted. When they have added the supplier to the Supplier file, you may access the financials system and create the requisition.
No Cost to the Health Science Center

If a Travel Requisition (In-State, Out-Of State or Foreign) will be of no cost to the Health Science Center, an item description **must still** be entered.

1. **Item Description**: No Cost to the Health Science Center
2. **Price**: should be $0.00
3. Click the OK to confirm this line item will be of No Expense
4. Click the OK button
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. The requisition must have been saved and 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 your requisition by populating any of the fields within the Search box.

- Requisition Name – if a personalized name/title was entered in the Requisition Defaults page, it can be used to search for a requisition
- Requisition ID
- Requisition Status (Pending Approval, Approved, Open, etc.)
- Date From/Date To – Select a timeframe where the requisition was entered
- Requester/Entered By – the operator ID of the operator who entered the requisition.
- Supplier ID – The Supplier ID of the Supplier
- Department – The Department ID the requisition was created for
- Req Type – Select the type of requisition
Searching with only the Requisition ID is preferred. Leave all other fields blank and this will provide you a wider search. To narrow the search criteria, populate most fields.

1. 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 has been approved. Requisitions having statuses of **Open, Cancelled, Denied, Approved or Pending** can be updated.

If a Requisition has a valid Check Budget ad 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 requisition be Check Budgeted and re-submitted to the Preferred Approvers.

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, which creates the Accounting entries.

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-encumbered twice, it will be adjusted.

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

*eProcurement → Manage Requisitions → Search for Requisition*

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

- Click OK to proceed with Editing your Requisition

Once the requisition is saved, has a Valid Budget status and the Preferred Approvers have been selected, the requisition should be submitted. An e-mail notification will be sent to the Preferred Approvers to approve or deny the requisition.
Clicking Submit allows for the Preferred Approvers to be notified. If Submit is not selected, the Requisition will not be available for Approval and contain a status of ‘Open.’

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 Project ID.

Copying a Travel Requisition is convenient when multiple individuals will be taking a trip to the same destination. To copy a requisition, follow the below steps:

1. Search for your requisition
2. Choose the <Select Action> option Copy
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.

When copying a Travel requisition, a common area often forgotten is the Use Saved Templates icon within the Travel page.

From the Edit Requisition – Review and Submit page:

5. Navigate to the Travel page
6. Click the Use Saved Templates icon (copy icon)
7. Complete all remaining blank fields within the Travel page

Navigate back to the requisition and complete all necessary areas.

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 onto the new Req.

![Message](image)

**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. Contact the Purchasing Department for assistance on cancelling the requisition.

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.

Travel Services does not need to be contacted to cancel a requisition. However, if a Requisition will be cancelled and UPT pricing was added to the Requisition, contact the Travel Group which was selected immediately.

*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 below steps:

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.
Requisition Details page will be displayed. To continue with the cancellation, click the Cancel requisition button. To abort the cancellation, click the Return to Manage Requisitions link.

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 the 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, BEFORE the status is processed into Complete. Once the status changes to Complete, it cannot be re-opened. 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:

1. Search for your requisition
2. Choose the <Select Action> option **Undo-Cancel**
3. Click **Go**
4. The Requisition Details page will appear with the information message below

Requisition Details for: Tammy Tovar

Business Unit: HSCSA
Requisition ID: 0000885552
Requisition Name: TEST COPY BASIC
Date: 10/08/2015
Status: Canceled
Total: $0.00 USD

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Status</th>
<th>Price</th>
<th>Qty</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>TEST LINE 1</td>
<td>Canceled</td>
<td>$5.00</td>
<td>1.00</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

If you would like to Resubmit this Requisition first click the "Reopen Requisition" button and then select the "Edit Requisition" from the Manage Requisitions page and click Go. Once you are at the Requisition Summary page click the "Save and Submit" button.

Return to Manage Requisitions

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
   - Supplier 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 below steps:

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 and has a Valid Budget status, click on Submit. 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 Edit Requisition – Review and Submit page and continue with processing the 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.
Within the Manage Requisitions page, the line status will display Cancelled and the Budget will now display Valid.
Chapter 6 - Foreign Travel Requisition

When a Requester prepares a travel requisition involving a trip to a foreign country, the Requester should select the Travel Type as FOREIGN. Within the Requisition Defaults page, TRAVEL AND FOREIGN must be selected. By predefining the type of requisition and the type of Travel, once the Requisition is approved by the Project and Department Approvers, an email notification will be sent to the VP and CFO to approve this requisition.

Foreign Travel requisitions should be processed at least one month in advance. This allows enough time for processing and approvals to occur.

Requisition Defaults:
The Requisition Type must be TRAVEL and the Travel Type must be FOREIGN

Confirmation Page

From the confirmation page an Additional Approvals section will display. When BOTH approvers have approved the requisition, the Additional Approvals section will change from Not Routed to Pending. When Foreign Travel Approval has occurred, the Additional Approvals section will display Approved.
Chapter 7 - Blanket Travel Authorization

Travel which covers more than one absence from a person’s headquarters city during a 12-month time period is called a “Blanket” travel. Authorization for Blanket travel is known as Blanket Travel Authorizations, and is generally prepared for two reasons:

- **Convenience** – The blanket travel authorization eliminates the need to prepare a blanket travel requisition for each trip taken by persons who routinely take multiple trips within the State of Texas. Multiple travel vouchers can be submitted during the 12-month period covered by the authorization.
- **Expediency** – Official HSC business travel requires an approved travel authorization to be in effect at the time a trip is taken. The blanket travel authorization ensures that persons who routinely need to make last minute trips will have an approved authorization in effect when they travel.

The University does not require a travel authorization to reimburse an employee for allowable travel expenses incurred within the employee’s headquarters city. Allowable travel expense reimbursements within the employee’s headquarters city are generally limited to reimbursement for automobile mileage and parking fees incurred while on official University business (Source: Business Affairs Bulletin No. 10 - FY 2002).

Blanket Travel Authorizations are entered by the ACE of the Department. To locate individuals which are authorized for Blanket Travel, from PeopleSoft Financials:

**HSC Self Service Inquiries ➔ Blanket Travel Inquiry**

1. Enter a Department ID
2. Enter a Budget Period
3. Click Search
A listing of individuals authorized for Blanket Travel will populate. Once the trip has been taken, the Traveler must turn in all receipts. The receipts will need to be attached to the Payment Request that is submitted to the Office of Accounting.

For questions relating to Travel Vouchers and Reimbursements, please contact the Office of Accounting at 210-562-6230. To add an individual to the Blanket Travel Authorization listing, the departmental ACE must complete this task.
Chapter 8 – Self Service Inquiries

The HSC Self Service Inquiries provides view only access to 17 different inquiries. All 17 inquiries are available to all PeopleSoft Financials Users. The only inquiry which requires specific access approval by the departmental ACE, is the Project Budget Inquiry.

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

The Voucher Quick view Inquiry will give all Financials users the ability to view attachments included in the Payment Request feature.

Also included within the Self Service Inquiries, is the option to print a requisition and print a purchase order. The steps for these two inquiries are reviewed in the following pages.

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 below steps:

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.

1. Click the **Search** button
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 bring up the new information. The screen will not automatically update.

To view a detailed image of the Requisition, Purchase Order, Voucher ID or Check Number, click on the **button** to the right of the document number. The button 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 Requisition 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 below steps:

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 ID.

To view another project ID, click on the Clear button from the search menu. Enter the new project ID number and click on the Search button.

**Voucher Quick view**

The Voucher Quick view offers a view of the entire voucher in a new window which offers individuals the option to print from this format. This is available in the Self Service Inquiries and all Financials users.
have access to view this inquiry. Users are also able to view any Attachments which were attached to the Payment Request when entered online.

Search by entering all or part of the Voucher ID then click on the magnifying glass icon. Select your Voucher ID from the listing provided.

The result page includes any Attachments that were included with an online Payment Request. To view the Attachments, click on the Attachment (0) link,

**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.

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

1. Click on the HSC Self Service Inquiries ➔ Print a Requisition / Print a Purchase Order link.

Search using one of the available search parameters:

- **Business Unit**: Do Not Change
- **PO ID**: Used to search for a specific Purchase Order
- **Requisition ID**: Used to search for a specific Requisition
- **Entered By**: Used to search by Requester (the individual who generated the requisition)
- **Status**: Used to search for REqs with a specific status
- **Department**: Used to search by a specific Dept. ID
- **Requisition Date**: Used to search for a requisition based on the date it was created
- **Supplier ID**: Used to search for a requisition by the supplier
- **Supplier ID PO**: Used to search for a requisition based on the project id used for the purchase
To search for a requisition by ID number, you must enter the leading zeros. You cannot “wildcard” the ID number. Enter the ten digit requisition ID number as shown below.

To retrieve a list of all requisitions or purchase orders you have access to, leave the fields blank and click the search button. 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.

1. Select the requisition(s) or purchase order(s) you want by clicking the box in the Line Select column.
2. Click the **Send** button. An email will be sent to your Outlook Inbox. You will see a message similar to the example below:

**For Requisitions:**

```
Message

Your request is being processed. You will receive the requisition(s) via e-mail momentarily. (0,0)
```

**OK**

**For Purchase Orders:**

```
Message

Your request is being processed. You will receive the Purchase Order(s) via e-mail momentarily. (0,0)
```

**OK**

You will receive an email message with a pdf attachment, which will look similar to the illustration appearing below.

3. Open the PDF attachment appearing in the e-mail message. The attachment will open using Adobe Acrobat® Reader™.

To print the requisition or the purchase order, click the ** button on the Adobe Acrobat® Reader™ toolbar.
Chapter 9 – Support Departments

Below is departmental information for the appropriate requisition type:

<table>
<thead>
<tr>
<th>Requisition type</th>
<th>Contact</th>
<th>Ph Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal requisition</td>
<td>Lab Animal Resources</td>
<td>(210) 567-6166</td>
</tr>
<tr>
<td>Basic purchase requisition</td>
<td>Purchasing Department</td>
<td>(210) 562-6200</td>
</tr>
<tr>
<td>Direct Connect 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>
</tbody>
</table>

Contact DCATS at any time for any questions or concerns you may have. (210) 450-0090

Chapter 10 – Online Training

If you would like training at your desk or a refresher, please review the online training modules. Log into the Knowledge Center and you will find all interactive, on-demand overviews and detailed training modules, which can be viewed at any time.

- Search under the Administrative heading for the desired session or module

You may also visit the DCATS webpage for job aids and additional resources to assist you when preparing a basic web requisition.