

PeopleSoft Financials

ePro Process Guide

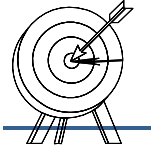
Direct Connect Requisitions

Information Management Client Support Services | DCATS

210-567-7777 / Option 5

ePro Process Guide | Version 2 | May 2011

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 Direct Connect Requisition will contain 2 vendors:
 - Today's Business Solutions
 - Fischer Scientific

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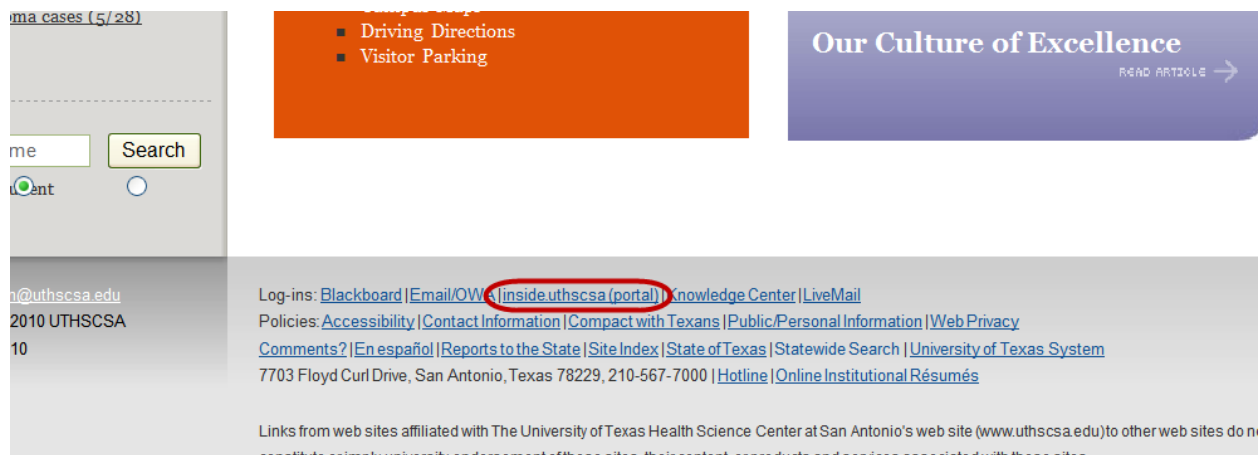
Chapter 1

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.



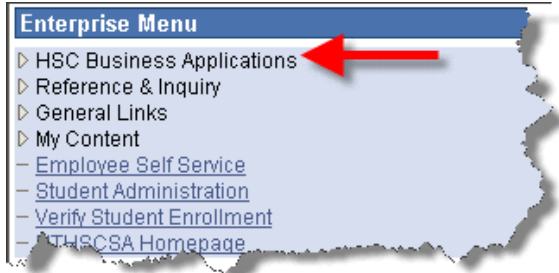
- This will bring up the HSC Portal logon.



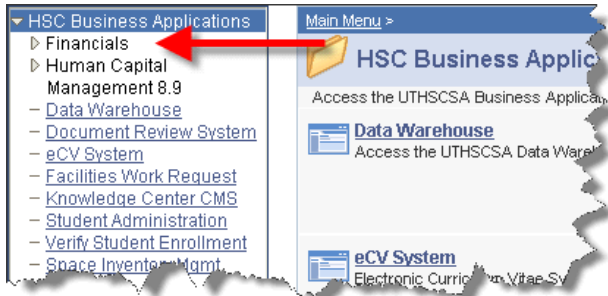
- Enter your NT User Name (Domain ID) and Password.

After successfully logging into the Portal, a 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.

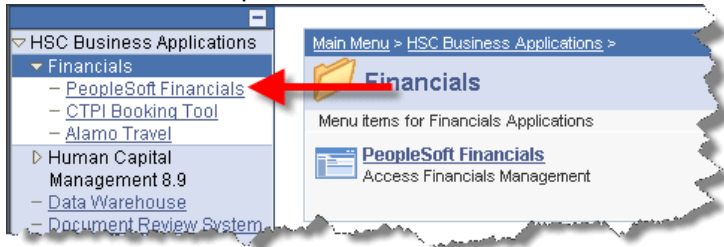
- Click on the HSC Business Applications link



- Click on the Financials link



- Click on the PeopleSoft Financials link



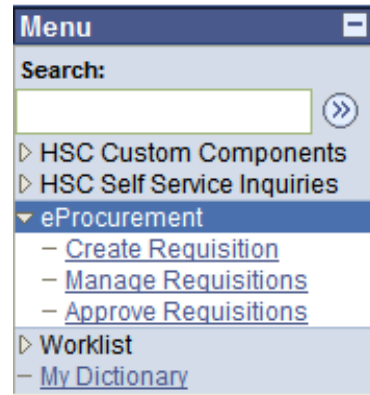
Once the PeopleSoft Financials link has been selected, a new browser window will display.



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 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 Offset 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

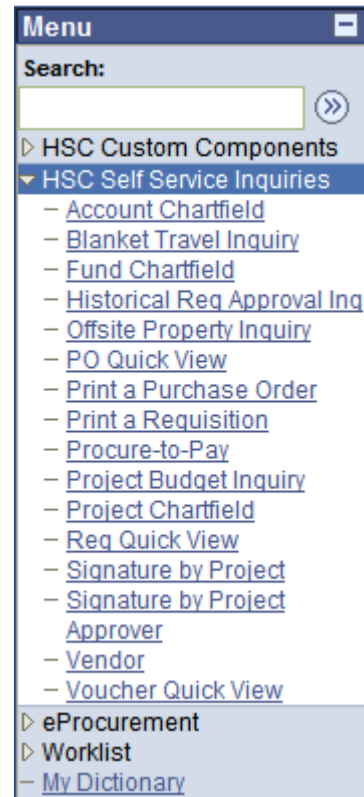
The Signature Inquiry by Project Approver will list all the project numbers a Project Approver is authorized to approve on.

Vendor

The vendor search will list information regarding vendors UT Health Science 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

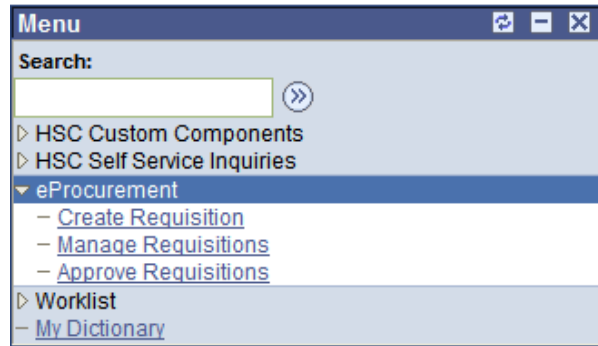
Requesters will click here to prepare a new requisition.

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.



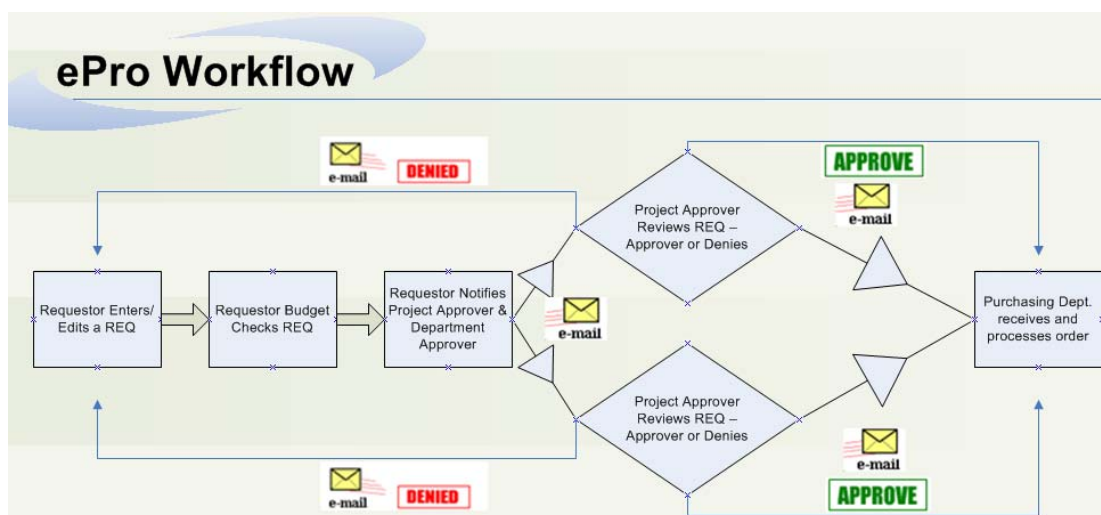
Chapter 2

Preparing a Direct Connect 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 Direct Connect 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.

DIRECT CONNECT must be selected when preparing a Direct Connect Web requisition. **When you click Continue, the Requisition Type cannot be adjusted.**

Create Requisition

1. Requisition Defaults | 2. Add Items and Services | 3. Review and Submit

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: MENDOZAMM | Mendoza,Michelle Marie

Requisition Name: | Origin: DCN

*Requisition Type: DIRECT CONNECT | *Priority: Medium

Travel Type: |

Radioactive/Hazardous

***Priority:** The Priority option is not used for General Stores, Travel or Direct Connect requisitions. The priority default will be set to Medium.

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. There are two Direct Connect Vendors: Fisher Scientific and Today's Business Solutions. Clicking on a link within the vendor's row of information will populate the chosen vendor's information into the Vendor ID and Vendor Location fields.

Look Up *Vendor ID

SetID:

Vendor ID:

Short Vendor Name:

Vendor Name 1:

[Basic Lookup](#)

Search Results

[View All](#) First 1-2 of 2 Last

Vendor ID	Short Vendor Name	Vendor Name 1	Vendor Name 2	Our Customer Number	Old Vendor ID
0000017271	FISHERSCIENTIF	FISHER SCIENTIFIC	(blank)	(blank)	(blank)
0000264177	TODAYSBUSI-001	TODAYS BUSINESS SOLUTIONS	(blank)	(blank)	(blank)

Vendor Location: A default order location will populate this field when a Direct Connect Vendor is selected.

Create Requisition

1. Requisition Defaults | **2. Add Items and Services** | **3. Review and Submit**

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: Mendoza,Michelle Marie

Requisition Name: Origin: DCN

*Requisition Type: *Priority:

Travel Type:


Radioactive/Hazardous

*Vendor ID: [TODAYS BUSINESS SOLUTIONS](#)
EDX LOCATION

[Contact Information](#)

***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:** For a Direct Connect requisition, the date will populate the date the requisition is being generated.

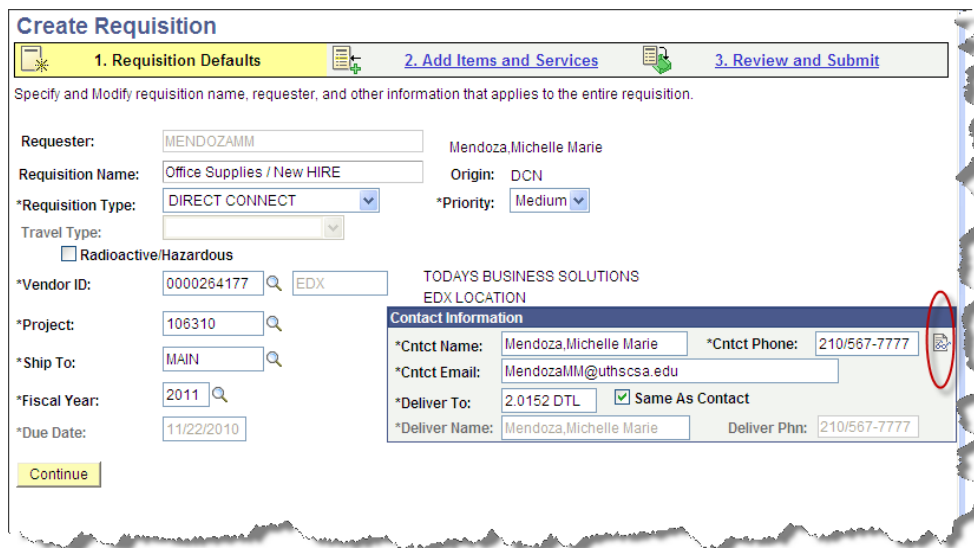
Contact Information

***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.



Create Requisition

1. Requisition Defaults | 2. Add Items and Services | 3. Review and Submit

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: MENDOZAMM Mendoza,Michelle Marie

Requisition Name: Office Supplies / New HIRE Origin: DCN

*Requisition Type: DIRECT CONNECT *Priority: Medium

Travel Type: Radioactive/Hazardous

*Vendor ID: 0000264177 EDX TODAY'S BUSINESS SOLUTIONS
EDX LOCATION

*Project: 106310

*Ship To: MAIN

*Fiscal Year: 2011

*Due Date: 11/22/2010

Continue

Contact Information

*Cntct Name: Mendoza,Michelle Marie *Cntct Phone: 210/567-7777

*Cntct Email: MendozaMM@uthscsa.edu

*Deliver To: 2.0152 DTL Same As Contact

*Deliver Name: Mendoza,Michelle Marie Deliver Phn: 210/567-7777

***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 Ph 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.

Create Requisition

1. Requisition Defaults | 2. Add Items and Services | 3. Review and Submit

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: MENDOZAMM Mendoza,Michelle Marie

Requisition Name: Office Supplies / New HIRE Origin: DCN

*Requisition Type: DIRECT CONNECT *Priority: Medium

Travel Type: Radioactive/Hazardous

*Vendor ID: 0000264177 EDX TODAY'S BUSINESS SOLUTIONS
EDX LOCATION

*Project: 106310

*Ship To: MAIN

*Fiscal Year: 2011

*Due Date: 11/22/2010

Contact Information

*Cntct Name: Mendoza,Michelle Marie *Cntct Phone: 210/567-7777

*Cntct Email: MendozaMM@uthscsa.edu

*Deliver To: 2.0152 DTL Same As Contact

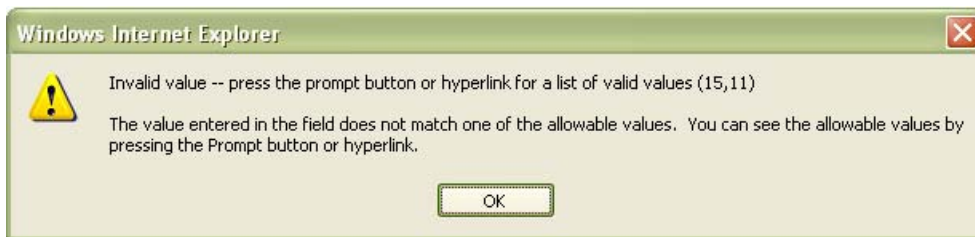
*Deliver Name: Mendoza,Michelle Marie Deliver Phn: 210/567-7777

Continue

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.

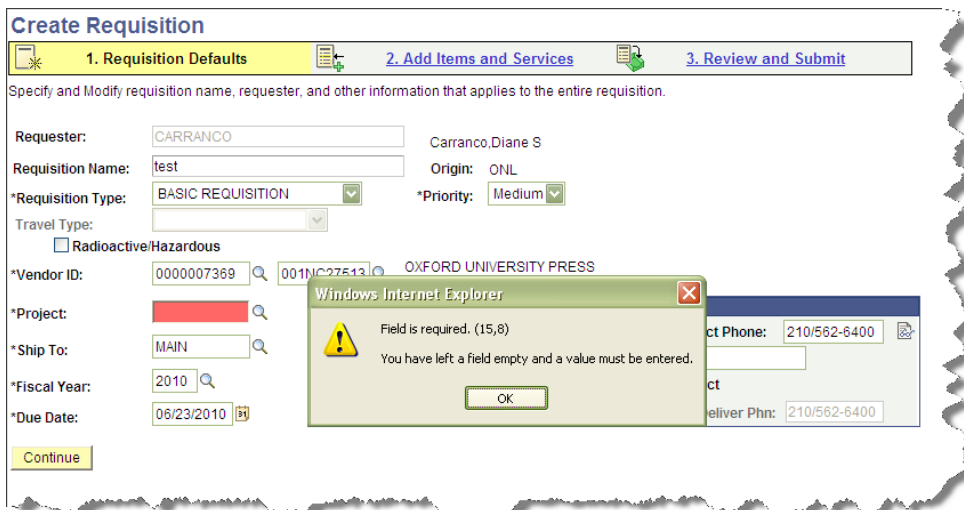
Issue: Project ID is incorrect and the below message displays



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

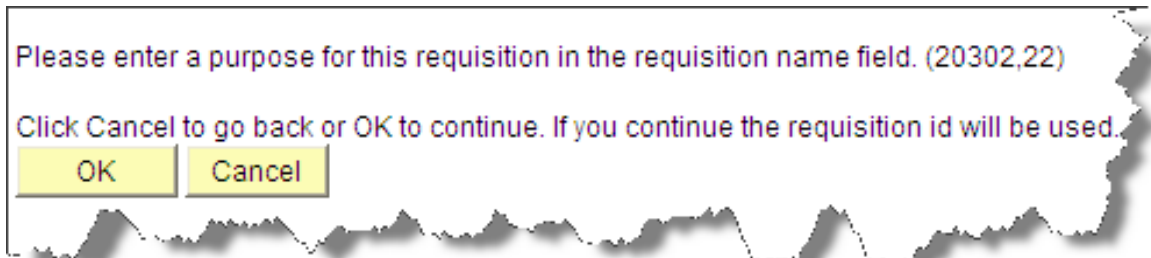
This will display information pertaining to the Project ID and display the department who is the owner of the project id.

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 to their approval notification.

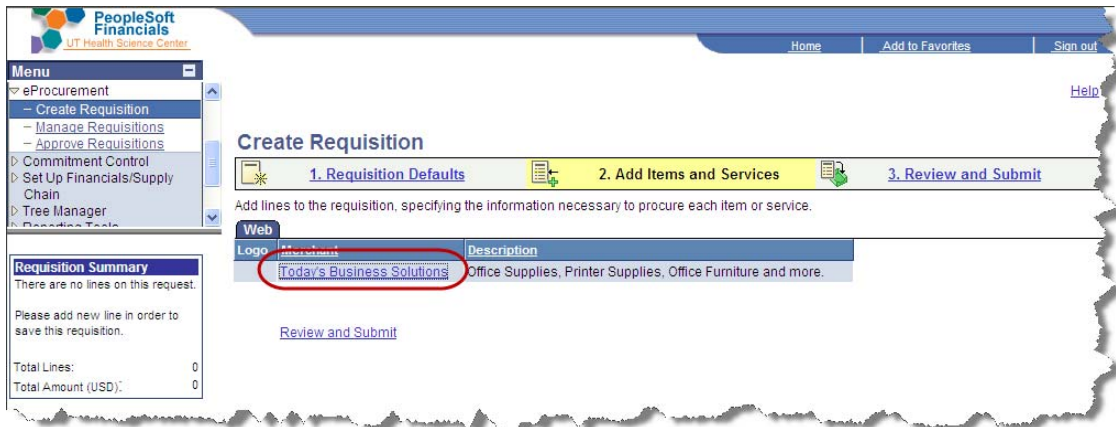
To add a Requisition Name: Click Cancel

To continue: Click OK

Add Items and Services

The second page the Requester will complete when creating a Direct Connect 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.

When generating a Direct Connect Requisition, a link to the selected Vendor's website will display. Click the link to proceed to the selected Direct Connect Vendor.



Note: If the Direct Connect Requisition will exceed \$5,000, it will be routed for a third approval by the Purchasing Department once the requisition has been approved by both the Project and Department Approver.

Ordering from a Direct Connect Vendor

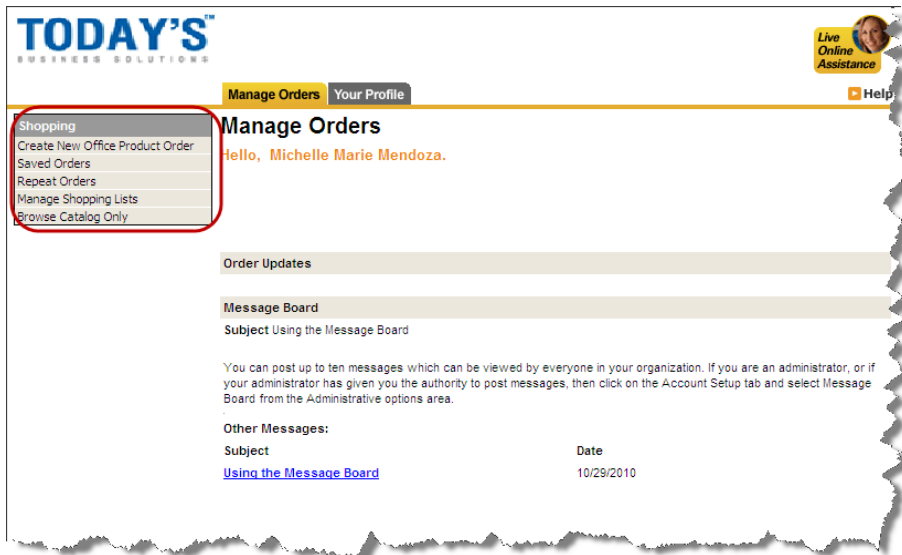
You will be directed to that Direct Connect Vendor's Website, which is external from the PeopleSoft Financials page. Each of the two Direct Connect Vendor's websites is separate from each other and searching within the websites differs.

Searching via a Direct Connect Vendor's website is very similar to logging onto the internet and searching online for products as you would in your personal life.

Today's Business Solutions

When ordering through Today's Business Solutions, the first page contains a menu listing to the left, in addition to an informational page with 2 tabs: Manage Orders and Your Profile.

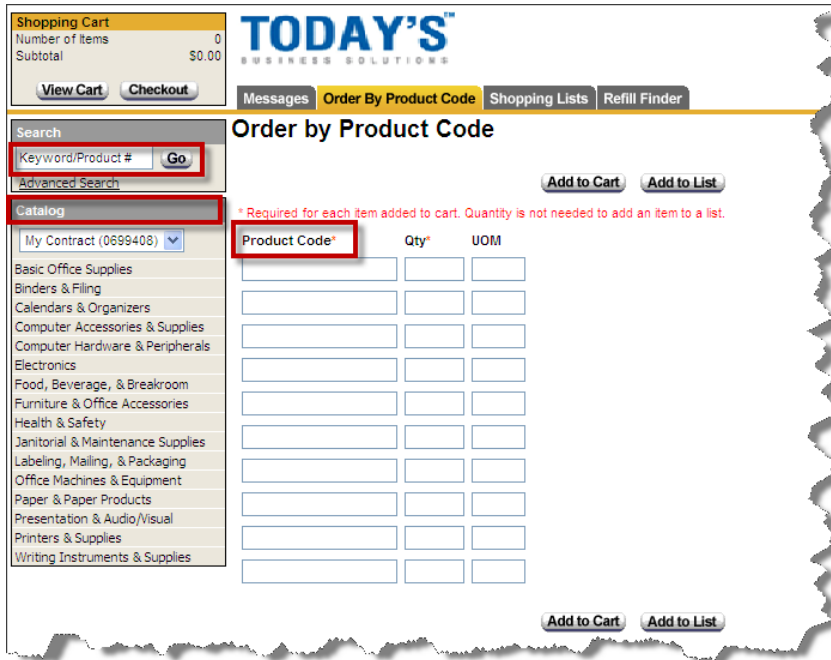
The home page is used to communicate important information regarding their website such as ordering items or if there is system maintenance to the Direct Connect Vendor's website, the information will be posted here.



Placing the Order

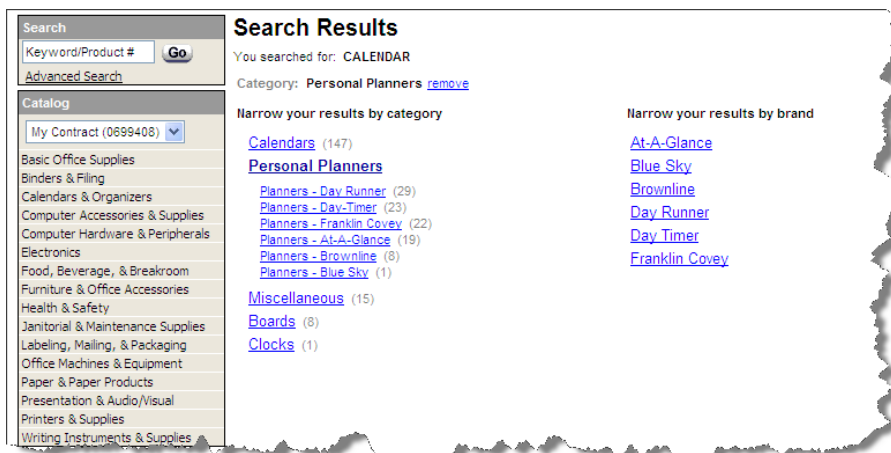
To begin placing an order with Today's Business Solutions, click on the **Create a New Office Product order** link. A new page will display.

To the left, a field is available to search for items using a Keyword or Product number. You may also use the drill down method from the Catalog's search listing. If a Product Code is known, it can be manually typed into the Product Code column.

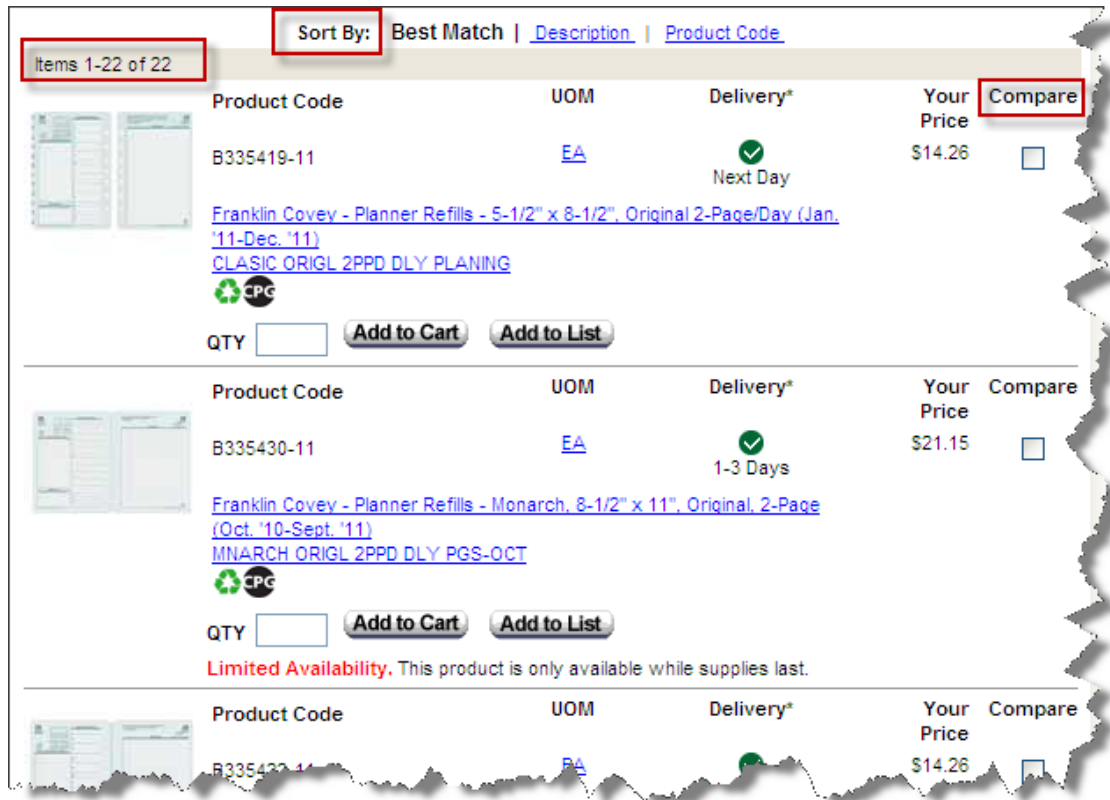


Search by Keyword

Searching via a keyword or product is a quick way to retrieve information. Enter a Keyword into the Search box and click Go. On the right side of the page, the Search Results will be displayed by Category and by Brand. Each specific product will show the number available in inventory by the number at the end of each item. Select your product.



The page which displays the available products offers a Sort by: feature; a Compare pricing option; also a hyperlink to view the product much clearer and with item specifications.



Prices listed are state contracted prices and are denoted by a **C**. Click the icon listed for a product to view a legend with information for each icon.

Click the hyperlink for the Item Description to view additional information regarding the product.

To order an available product:

1. Enter a quantity into the QTY field
2. Click Add to Cart
3. Click the Checkout button

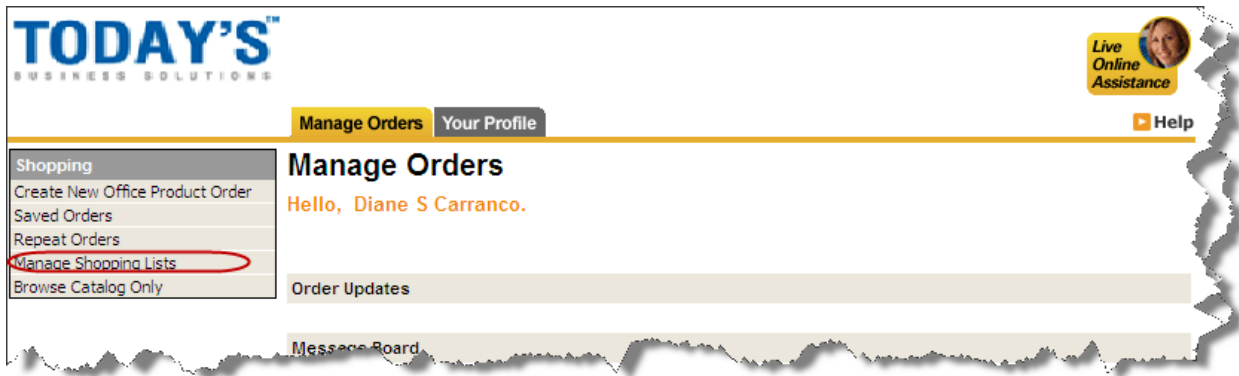
As items are added, the Shopping Cart subtotal will reflect the selected items. You may continue shopping or click the Checkout button. The Checkout button is located in three different areas of the Today's Business Solutions page. It must be selected to return to the requisition. Upon checkout, any items which have been added will be placed onto the Requisition.

Creating a Shopping List

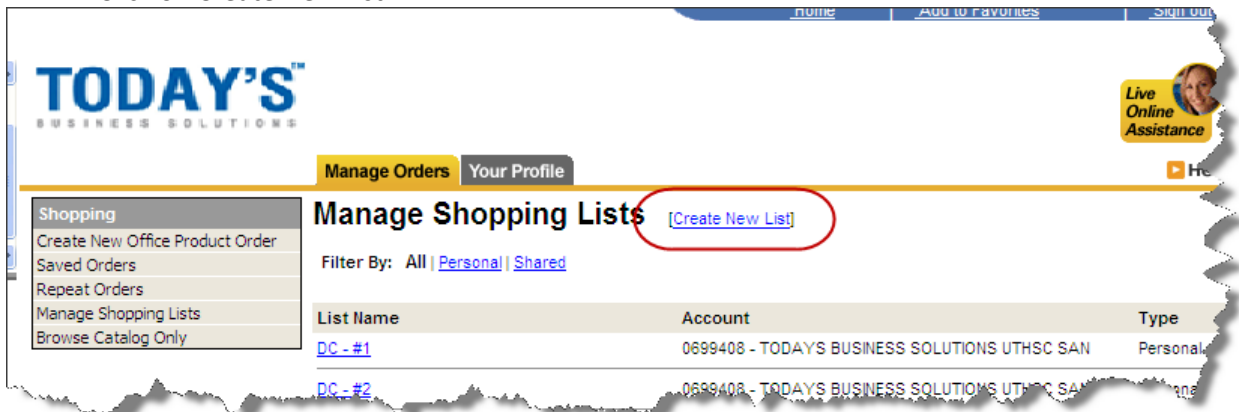
Today's Business Solutions allows you to create Shopping Lists which can be used at a later time. To create a List:

Access Today's Business Solutions via Direct Connect Requisition

1. Click on Manage Shopping Lists

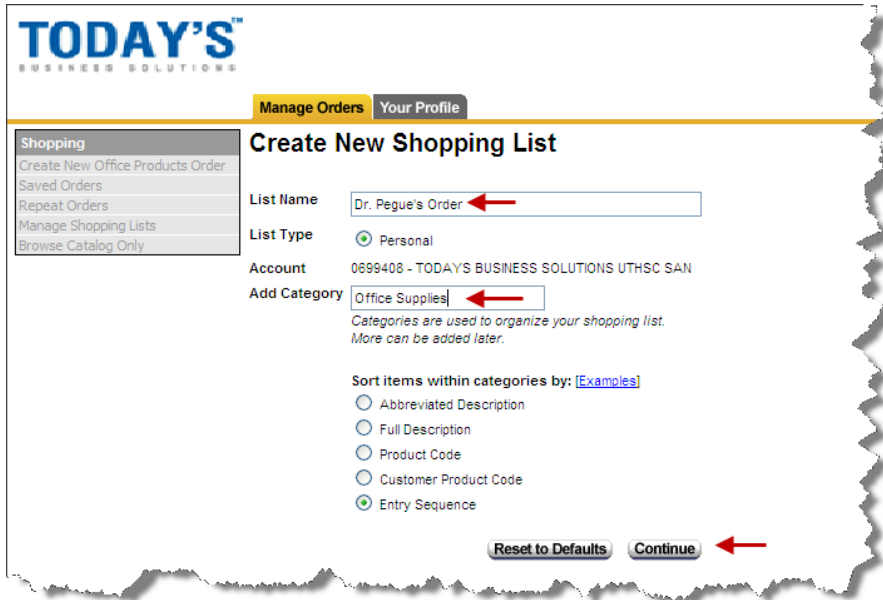


2. Click on Create New List



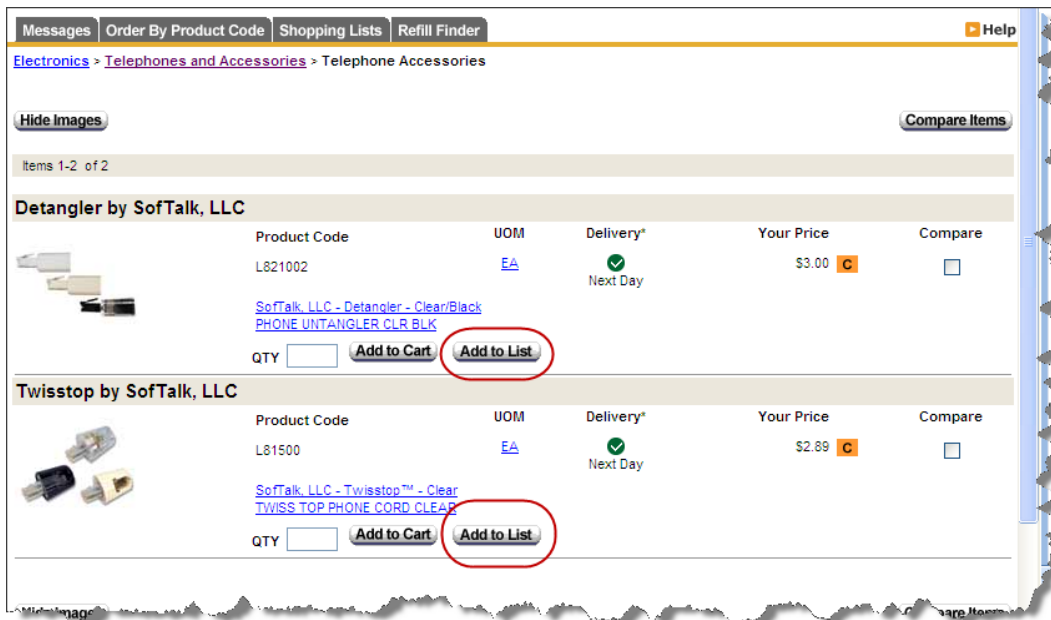
3. Enter a List Name & enter an Add Category
4. Click Continue

Once the Shopping List is created, you may add products to the list at a later time.

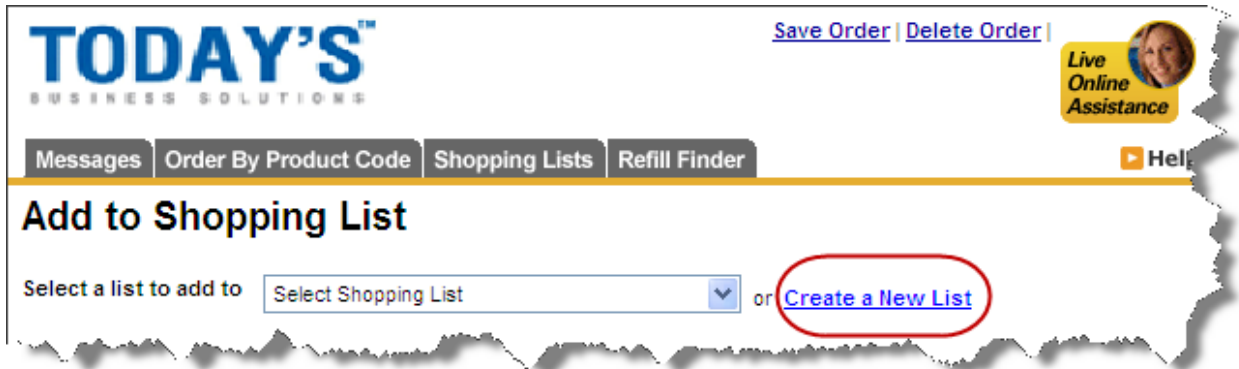


To Create a List, go into the Today's Business Solution's catalogue

1. Locate the item you would like add to a new list
2. Click Add to List for that item

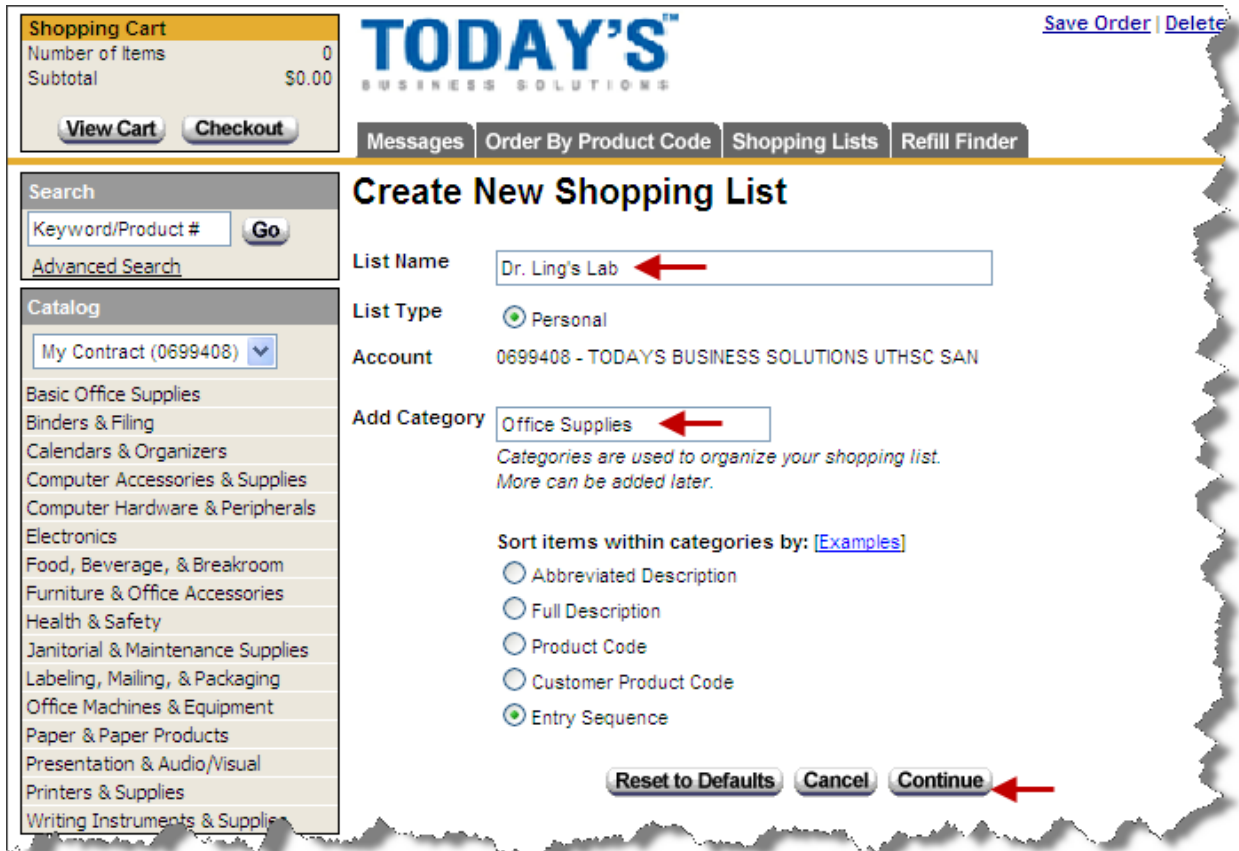


3. Click Create a New List



4. Enter a List Name & enter an Add Category
5. Click Continue

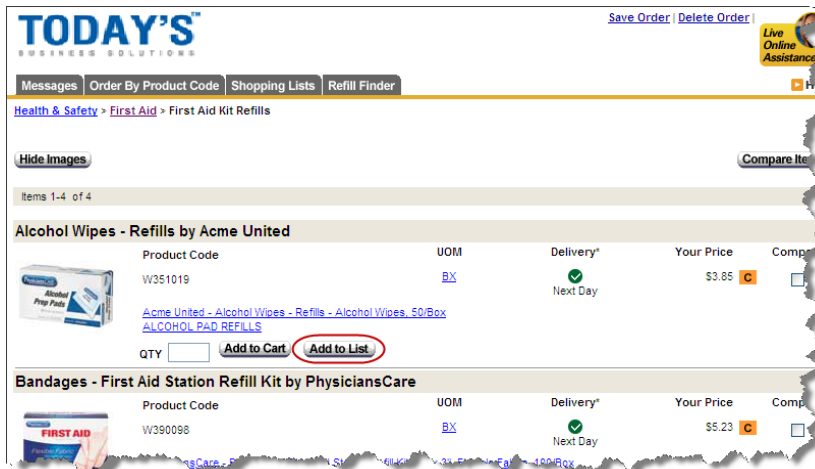
Once the list is created, the item will be added to that list.



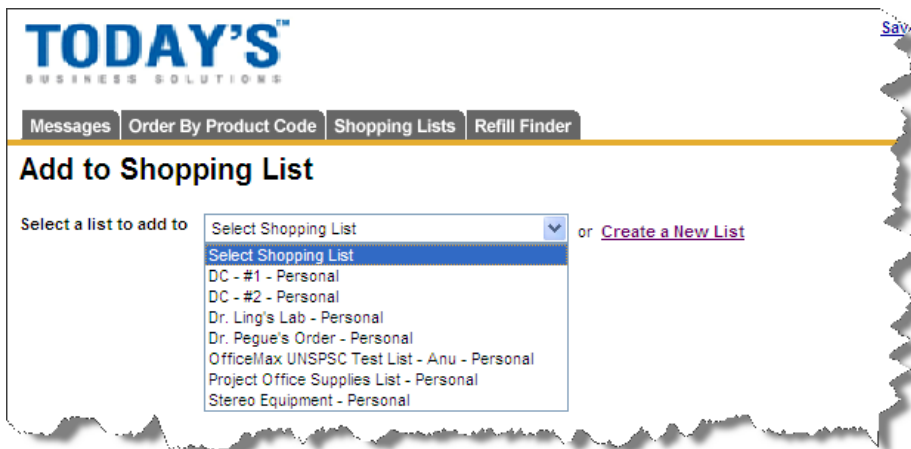
Adding items to a Shopping List

To add items to an existing Shopping List, follow the steps below:

1. Locate the item you are adding to a new list
2. Click Add to List



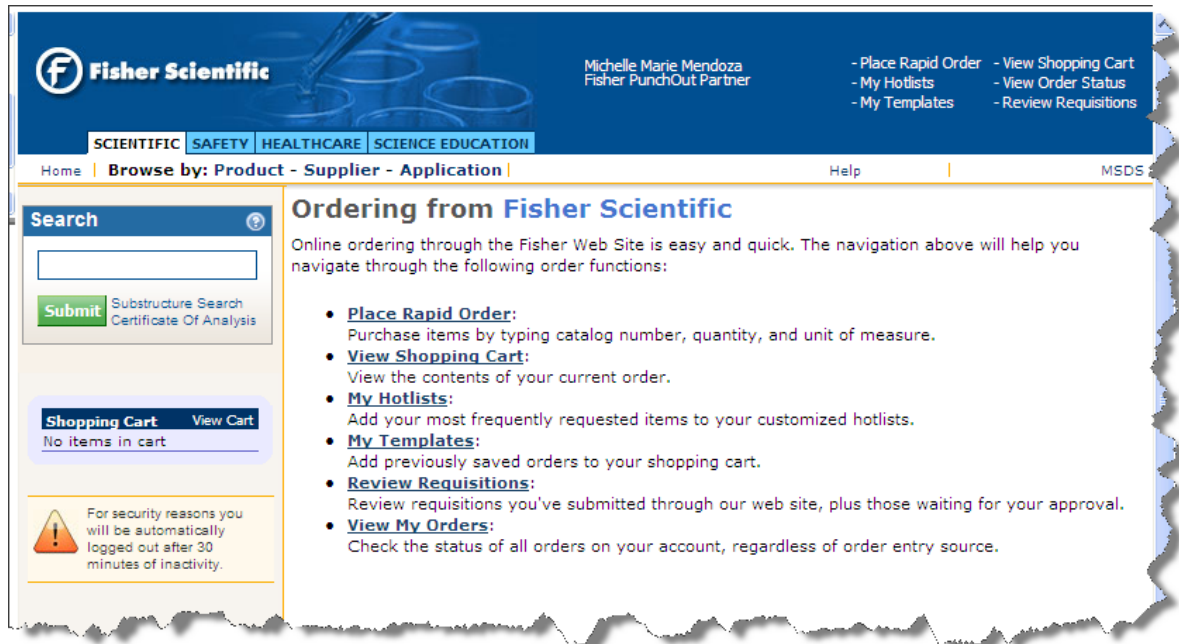
3. Click the Select a List to Add To drop down arrow and choose the Shopping List you would like your item added to.



4. Click Continue to add the item to the Shopping List

Fischer Scientific

When ordering through Fisher Scientific, the first page titled Ordering, provides an overview of the items offered by Fisher Scientific.



Place a Rapid Order: This option provides a field to enter the Catalog number of the product, quantity and unit of measure.

View Shopping Cart: This option allows you to view the items currently being ordered.

My Hotlists: This option is used to add frequently requested items to your customized shopping list.

Placing the Order

To begin placing an order with Fisher Scientific, a Search box is provided to the left which can be used to search by keywords.

Using a keyword in the Search box will search for the item in four categories within the Fisher Scientific website: Scientific, Safety, Health Care and Science Education. This will broaden results.

Another search method is to drill through **Browse by:** through Product, Supplier and Application within the Catalog's search listing.

Fisher Scientific

Michelle Marie Mendoza
Fisher PunchOut Partner

- Place Rapid Order
- My Hotlists
- My Templates
- View Shopping Cart
- View Order Status
- Review Requisitions

SCIENTIFIC SAFETY HEALTHCARE SCIENCE EDUCATION

Home | Browse by: Product - Supplier - Application | Help | MSDS

Search

Submit Substructure Search Certificate Of Analysis

Shopping Cart View Cart
No items in cart

For security reasons you will be automatically logged out after 30 minutes of inactivity.

Ordering from Fisher Scientific

Online ordering through the Fisher Web Site is easy and quick. The navigation above will help you navigate through the following order functions:

- **Place Rapid Order:**
Purchase items by typing catalog number, quantity, and unit of measure.
- **View Shopping Cart:**
View the contents of your current order.
- **My Hotlists:**
Add your most frequently requested items to your customized hotlists.
- **My Templates:**
Add previously saved orders to your shopping cart.
- **Review Requisitions:**
Review requisitions you've submitted through our web site, plus those waiting for your approval.
- **View My Orders:**
Check the status of all orders on your account, regardless of order entry source.

If a Product Code is known, the **Place Rapid Order** link can be selected. The Product ID can then be manually typed within the Catalog Number field.

Rapid Order

To create a Rapid Order, enter:

- Catalog number (Fisher catalog number, Manufacturer/Supplier part number, or customer-specific catalog number)
- Quantity
- Unit of measure

To enter more than five items:

- Complete the first five lines
- Click the **Add More Items** button.

Account Number
826785-001

	Catalog Number (Fisher, supplier or competitor)	Quantity	Unit
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

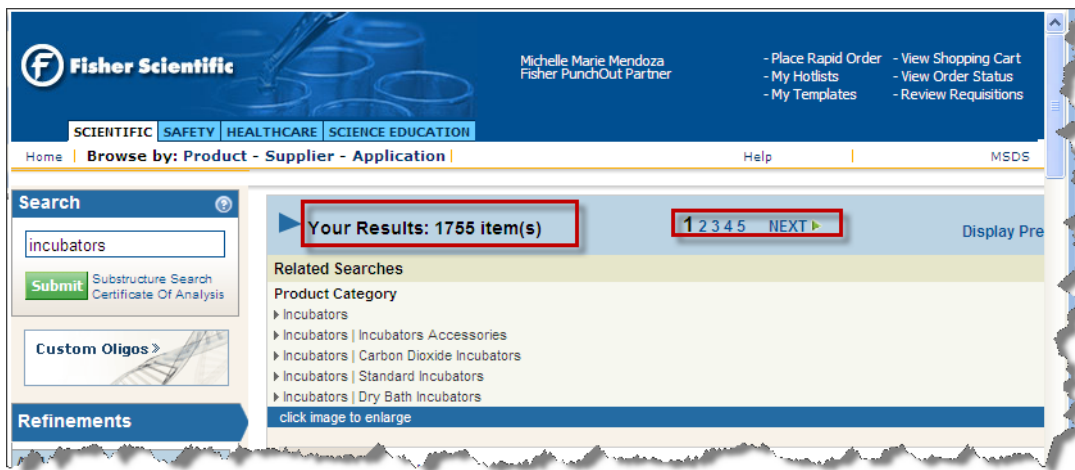
Add Item(s) to Shopping Cart Add More Items

Search by Keyword

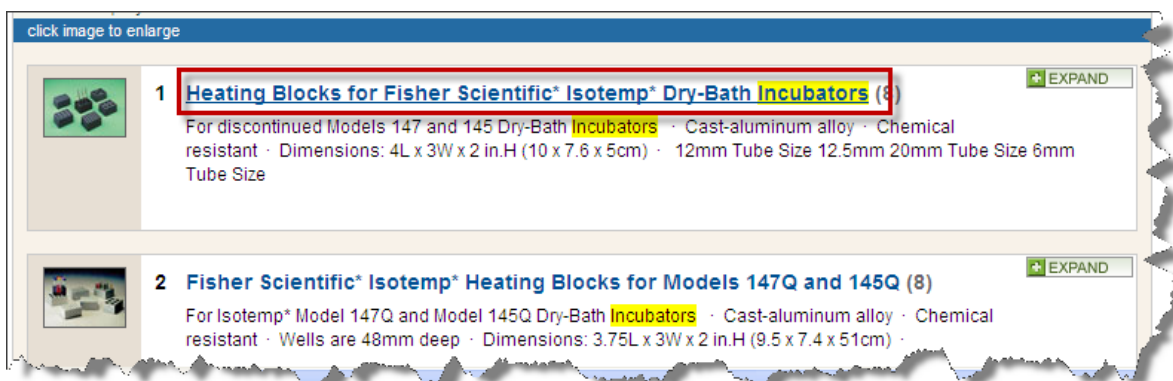
If searching via the Search Box enter a term into the Search field and click Submit. A listing of items will display to the right. All items listed contain the keyword which was searched for.

1. Enter a Keyword into the Search field
2. Click Submit
3. Locate the product

The Results page will list the total items available along with additional pages for the item.



Click the line description hyperlink to view additional information regarding the search results listed.

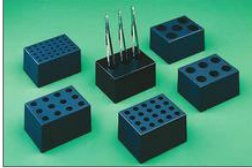


When the product information displays, a description of the product will also display. You will also see similar types of the selected product listed.

If a product is not available, or discontinued, a communication will display.

Heating Blocks for Fisher Scientific® Isotemp® Dry-Bath Incubators

For discontinued Models 147 and 145 Dry-Bath Incubators



[See details](#)

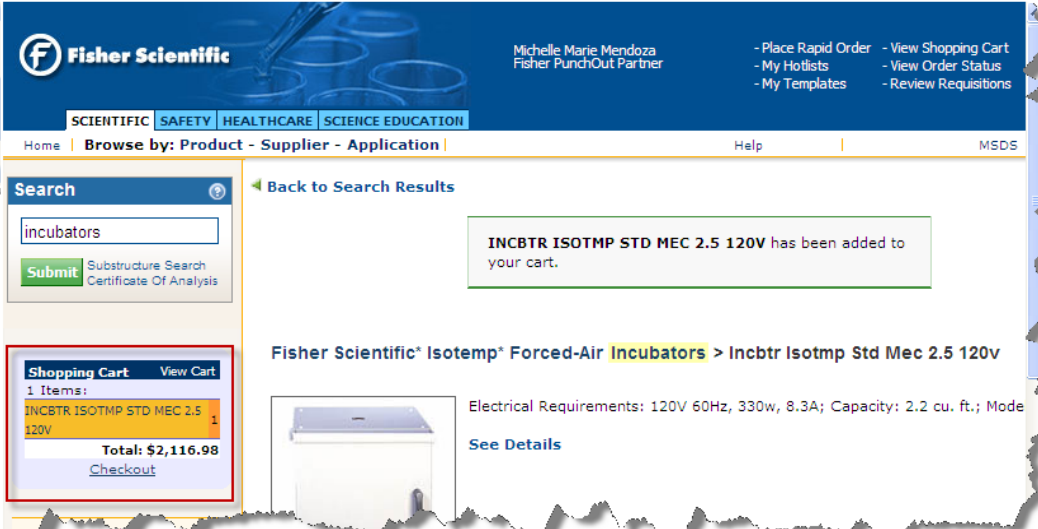
11-715 Series

Items Details Images

Description	Catalog Number	Quantity	Price
6mm Tube Size	11-715-105	<input type="text"/>	Each for \$76.64
Add to Hotlist Add to Cart			
10 Mm Dry Block	11-715-107	N/A	N/A
Discontinued Catalog Number. Please call Customer Service. 1-800-766-7000.			
12mm Tube Size	11-715-109	N/A	N/A
Discontinued Catalog Number. Please call Customer Service. 1-800-766-7000.			
13mm Tube Size	11-715-111	N/A	N/A

To order an available product:

1. Enter a quantity into the QTY field
2. Click Add to Cart
3. Click Checkout
4. Click Submit



Fisher Scientific Michelle Marie Mendoza Fisher PunchOut Partner

- Place Rapid Order
- My Hotlists
- My Templates
- View Shopping Cart
- View Order Status
- Review Requisitions

SCIENTIFIC SAFETY HEALTHCARE SCIENCE EDUCATION

Home | Browse by: Product - Supplier - Application | Help | MSDS

Search: incubators

Submit Substructure Search Certificate Of Analysis

Back to Search Results

INCBTR ISOTMP STD MEC 2.5 120V has been added to your cart.

Shopping Cart View Cart

1 Items:

INCBTR ISOTMP STD MEC 2.5 120V 1

Total: \$2,116.98

Checkout

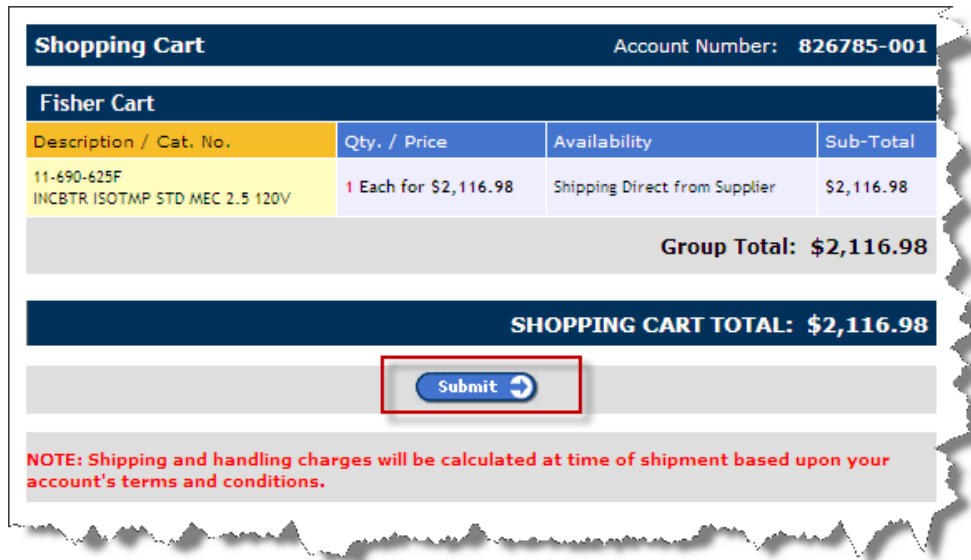
Fisher Scientific® Isotemp® Forced-Air Incubators > Incbtr Isotmp Std Mec 2.5 120v

Electrical Requirements: 120V 60Hz, 330w, 8.3A; Capacity: 2.2 cu. ft.; Mode

[See Details](#)



Once your item(s) has been added, the Shopping Cart subtotal will reflect the selected items. At this time, you can continue shopping or click the Checkout option. Once you have clicked Checkout, you will be directed to a final Shopping Cart page.

The Submit button must be clicked for all items to be placed into the Requisition.



Checking Out from a Direct Connect Vendor

After ordering from either Today's Business Solutions or Fisher Scientific, each vendor will provide you with a Check Out button or link. This option must be selected to proceed back to the PeopleSoft Financials Requisition; you will be directed back to the Add Items and Services page.

- **Today's Business Solutions** will contain a  button. Clicking Checkout will direct you to the PeopleSoft Financials requisition page and transfer all items into the requisition.
- **Fisher Scientific:** will contain a [Checkout](#) link. Clicking Checkout will direct you to a final page. This page will contain a  button. Clicking submit will direct you to the PeopleSoft Financials requisition page and transfer all items into the requisition.

To the left of the page, the Requisition Summary will be updated with all selected items for the order. Click the Review and Submit link or tab to continue to the next page.

Review and Submit **BEGIN HERE**

The third page the Requester must complete when creating a Direct Connect Web requisition is the **Review and Submit**. This page is used to add and delete line items, update quantity, and to add comments to the requisition. These comments may be added free from or 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 Approver, the Vendor or Central Receiving. Comments included with your requisition will carry forward to the purchase order.

Comments should be entered as separate “comment rows” by formatting comments by clicking the Enter Key on the keyboard. This allows for a cleaner look to a customer’s requisition. Comments rows can then be viewed using the scroll bar from the Header Comments window.

Create Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: HSCSA UT HEALTH SCIENCE CENTER AT SA

Requester: MENDOZAMM Mendoza, Michelle Marie Requisition Type: DIRECT CONNECT

Requisition Name: Supplies - MMM *Currency: USD *Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	DRY BATH, ANALOG, 1 BLOCK	FISHER SCIENTIFIC	1.0000	Each	255.42000	255.42
2	DRY BATH, ANALOG, 4 BLOCK	FISHER SCIENTIFIC	2.0000	Each	640.10000	1,280.20

Select All / Deselect All

Total Amount: 1,535.62 USD

Delete

Header Comments

Standard Comments Justification Memo

Deleting a Requisition Line

To delete items which were entered, a column of check boxes are available in front of each line. To delete an item, a check box must be clicked, and then the Delete button should be clicked. Doing so will remove the line item from your requisition.

To delete a line item, follow the below steps from the Review and Submit page:

1. Click the **check box** for the appropriate line
2. Click the  button

Create Requisition

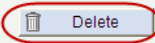
1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

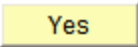
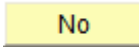
Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: HSCSA UT HEALTH SCIENCE CENTER AT SA
 Requester: MENDOZAMM Mendoza,Michelle Marie Requisition Type: DIRECT CONNE
 Requisition Name: test *Currency: USD *Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/>	1 CONNECT WHIP HIGH PRESSURE	FISHER SCIENTIFIC	2.0000	Each	285.99000	571.98
<input type="checkbox"/>	2 LITTLE JOE TORSO	FISHER SCIENTIFIC	3.0000	Each	30.31000	90.93
<input type="checkbox"/>	3 ENGLISH UNIT CALIPER 0-1IN	FISHER SCIENTIFIC	5.0000	Each	31.39000	156.95
<input type="checkbox"/>	4 MICROMETER-0-25MM	FISHER SCIENTIFIC	2.0000	Each	25.51000	51.02
<input type="checkbox"/>	5 FLASK FILTER 1000ML 40/35	FISHER SCIENTIFIC	5.0000	Each	105.44000	527.20
<input type="checkbox"/>	6 FLASK FILTER 125ML #5 JOINT	FISHER SCIENTIFIC	1.0000	Each	34.20000	34.20
<input type="checkbox"/>	7 INCBTR ISOTMP STD.MEC 2.5 120V	FISHER SCIENTIFIC	1.0000	Each	2,116.98000	2,116.98

Select All / Deselect All Total Amount: 3,549.26



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

Are you sure you want to delete the selected line(s)? (18036,2315)



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 Quantity

To edit the Quantity of an item, the Direct Connect Vendor's website does not need to be re-accessed. A Quantity column is available for making Quantity updates.

To Update the Quantity:

1. Enter the new amount into the Quantity column for the specific line
2. Tab out – this will update the line total and requisition total

The screenshot shows the 'Create Requisition' interface. At the top, there are three tabs: '1. Requisition Defaults', '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there is a message: 'Review the details of your requisition, make any necessary changes, and submit it for approval.' The form includes fields for 'Business Unit' (HSCSA), 'Requester' (MENDOZAMM), 'Requisition Name' (Supplies - MMM), 'Requisition Type' (DIRECT CONNECT), '*Currency' (USD), and '*Priority' (Medium). Below this is a table titled 'Requisition Lines' with columns: Line, Description, Vendor Name, Quantity, UOM, Price, and Total. The table contains two rows: Line 1 with 'DRY BATH, ANALOG, 1 BLOCK' and Line 2 with 'DRY BATH, ANALOG, 4 BLOCK'. The 'Quantity' column for Line 2 is circled in red. Below the table are buttons for 'Select All / Deselect All' and 'Delete'. At the bottom, there is a 'Header Comments' section with 'Standard Comments' and 'Justification Memo' tabs.

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	DRY BATH, ANALOG, 1 BLOCK	FISHER SCIENTIFIC	1.0000	Each	255.42000	255.42
2	DRY BATH, ANALOG, 4 BLOCK	FISHER SCIENTIFIC	2.0000	Each	640.10000	1,280.20

Total Amount: 1,535.62 USD

Adding Line Items

To add additional items to the Direct Connect Requisition, simply click on a current line item. This will direct you back to the Direct Connect Vendor's website.

Once you are back at the Direct Connect vendor's website proceed with searching and ordering items. Please view the section titled [Order from a Direct Connect Vendor](#).

Requisition Lines							
Line	Description	Vendor Name	Quantity	UOM	Price	Total	
▷ <input type="checkbox"/> 1	DRY BATH. ANALOG. 1 BLOCK	FISHER SCIENTIFIC	<input type="text" value="1.0000"/>	Each	255.42000	255.42	
▷ <input type="checkbox"/> 2	DRY BATH. ANALOG. 4 BLOCK	FISHER SCIENTIFIC	<input type="text" value="2.0000"/>	Each	640.10000	1,280.20	
<input type="checkbox"/> Select All / Deselect All						Total Amount:	1,535.62 USD
		<input type="button" value="Delete"/>					

The Add Items and Services link can also be used to navigate back to the Direct Connect Vendor's site. Within the Add Items and Services page, click on the Direct Connect Vendor's link. You will be routed back to the Direct Connect Vendor's website for additional ordering.



Note: If you return to the Direct Connect Vendor's site via the Add Items and Services link an item **must** be selected in order to Checkout and return to the requisition.

Adding Comments to Your Requisition

Comments may be entered as free-form comments, or selected from the Standard Comments options. Additionally, the Justification Memo options will be listed.

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, and Central Receiving.

▷ <input type="checkbox"/> 2	DRY BATH. ANALOG. 4 BLOCK	FISHER SCIENTIFIC	<input type="text" value="2.0000"/>	Each	640.10000	1,280.20	
<input type="checkbox"/> Select All / Deselect All						Total Amount:	1,535.62 USD
		<input type="button" value="Delete"/>					
Header Comments							
<input type="button" value="Standard Comments"/>		<input type="button" value="Justification Memo"/>					
free form comments go here.							
<input type="button" value="Save & preview approvals"/>							



Adding Free-form Comments

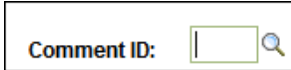
Free-form comments are comments you enter by typing directly into the large, white comment window labeled Header Comments within the Review and Submit page. The comment will print by default.


Adding Standard Comments

Standard Comments are provided to speed the entry of comments. They also help Requesters remember to include important details they might otherwise forget to include in their requisition comments.

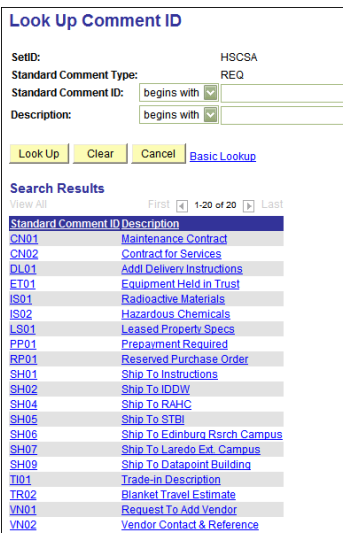
To enter Standard Comments, follow the below steps:

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



Comment ID: 

3. Click the Standard Comment you want to use.



Look Up Comment ID

SetID: HSCSA
Standard Comment Type: REQ

Standard Comment ID: begins with

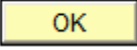
Description: begins with

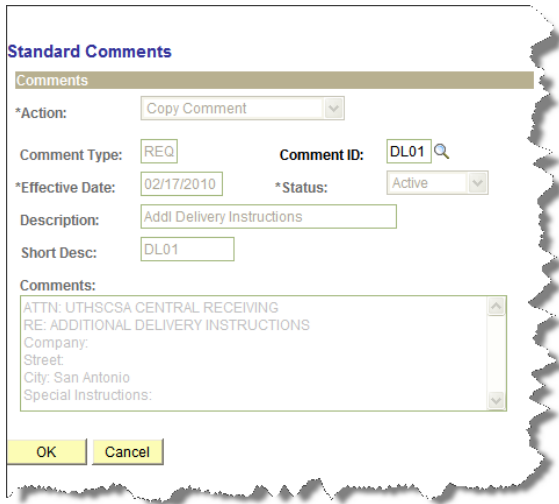
[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

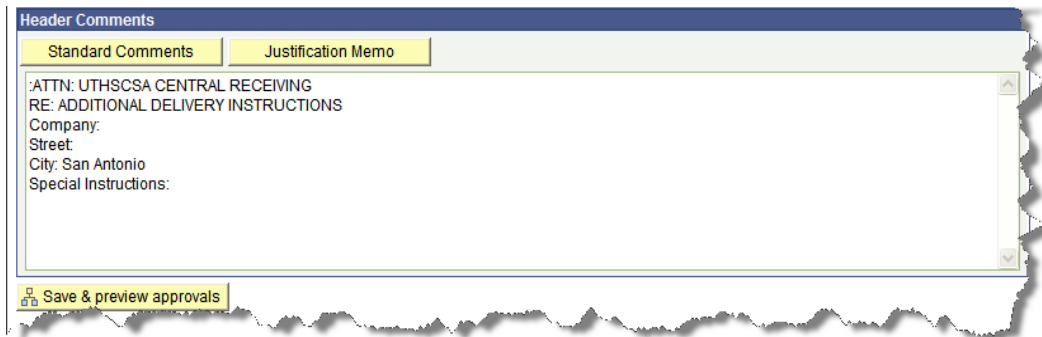
View All First 1-20 of 20 Last

Standard Comment ID	Description
CN01	Maintenance Contract
CN02	Contract for Services
DL01	Add Delivery Instructions
ET01	Equipment Held in Trust
IS01	Radioactive Materials
IS02	Hazardous Chemicals
LS01	Leased Property Specs
PP01	Prepayment Required
RP01	Reserved Purchase Order
SH01	Ship To Instructions
SH02	Ship To IDIW
SH04	Ship To RAHC
SH05	Ship To STBI
SH06	Ship To Edinburg Resrch Campus
SH07	Ship To Laredo Ext. Campus
SH09	Ship To Datapoint Building
TI01	Trade-in Description
TR02	Blanket Travel Estimate
VN01	Request To Add Vendor
VN02	Vendor Contact & Reference


As shown in the illustration below, the Comment ID field will be populated with the ID number of the Standard Comment you selected. Click the  pushbutton to accept the Standard Comment.



The Standard Comment you selected will appear in the Header comments window as shown in the illustration below.



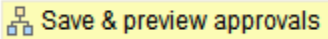
Edit the Standard comment as needed. Text entered can be added to, or edited.

To insert additional Standard comment(s), click the  button again and follow the Steps 1 – 3 from the **Adding Standard Comments** section. Once the new Standard Comment is in the text box, you may need to edit the spacing between the Standard Comments for a cleaner look.

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.

Location of Fields	Minimum Required Fields
1. Requisition Defaults	All (required fields must be completed before proceeding to the next page)
2. Add Items and Services	All (one line item must be entered before proceeding to the next page)
3. Review and Submit	NONE

In order for the system to generate a Requisition ID, you must be within the **Review and Submit** page of the Requisition. Within the **Review and Submit** page the  button will be clicked. As long as the minimum required fields have been completed, you will be assigned a Requisition ID and be directed to the Confirmation page.

Menu

Search: []

- HSC Custom Components
- HSC Self Service Inquiries
- ▾ eProcurement
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
- Worklist
- My Dictionary

Requisition Summary

Description	Qty	UOM
dell optiplex	2	EA
wireless ke...		
chair - ex. style	1	EA
Total Lines: 2		
Total Amount (USD): 4,801.50		

Confirmation

Requested For: Deidre E Lenow - Stai Email Number of Lines: 2

Requisition Name: New Computers for Employee Total Amount: 4,801.50 USD

Requisition ID: 0000543859

Business Unit: HSCSA Comments To Approver: []

Priority: Medium *Preferred Project Approver: []

Budget Status: Not Checked *Preferred Department Approver: []

Requisition Approval

New Computers for Employee: Initiated

Project Approval

Not Routed
Multiple Approvers
Project Approval

Department Approval

Not Routed
Multiple Approvers
Department Approval

Submit Edit Requisition Apply Approval Changes Check Budget

[Requisition Quick View](#) [Manage Requisitions](#) [Create New Requisition](#)

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 Requisition. Within the Confirmation page, you will be assigned a Requisition ID. 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.

Items available within the Confirmation page are the **Check Budget** and **Approval Notifications**. Once a Check Budget processes with a status of Valid, the Preferred Approver fields will become available. After comments are entered and each Preferred Approver is 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. It makes certain the necessary information is present on your requisition to proceed to the Check Budget process.

The **Check Budget** process will verify that the Project ID you have entered, on the Requisition Defaults page of your requisition, has sufficient funds (for the budget period you have entered on your requisition) to cover the total cost of the items on your requisition.

The screenshot shows a web interface for requisition management. At the top, there is a 'Confirmation' section with the following details:

Requested For:	Deidre E Lenow - Stai Email	Number of Lines:	2
Requisition Name:	New Computers for Employee	Total Amount:	3,652.73 USD
Requisition ID:	0000543859	Comments To Approver:	<input type="text"/>
Business Unit:	HSCSA	*Preferred Project Approver:	<input type="text"/>
Priority:	Medium	*Preferred Department Approver:	<input type="text"/>
Budget Status:	Not Checked		

Below the confirmation is the 'Requisition Approval' section, which is titled 'New Computers for Employee: Initiated'. It contains two approval panels:

- Project Approval:** Status 'Not Routed', with a 'Multiple Approvers' icon and 'Project Approval' text.
- Department Approval:** Status 'Not Routed', with a 'Multiple Approvers' icon and 'Department Approval' text.

At the bottom of the screen, there are four buttons: 'Submit', 'Edit Requisition', 'Apply Approval Changes', and 'Check Budget'. The 'Check Budget' button is highlighted with a red circle.

If your requisition passes the Check Budget process, you will then be able to select your Preferred Approvers and **Submit** your requisition.

Confirmation

Requested For:	Mendoza,Michelle Marie	Number of Lines:	1
Requisition Name:	GS APRIL7	Total Amount:	263.35 USD
Requisition ID:	0000544436	Comments To Approver:	<input type="text"/>
Business Unit:	HSCSA	*Preferred Project Approver:	<input type="text"/>
Priority:	Medium	*Preferred Department Approver:	<input type="text"/>
Budget Status:	Valid		

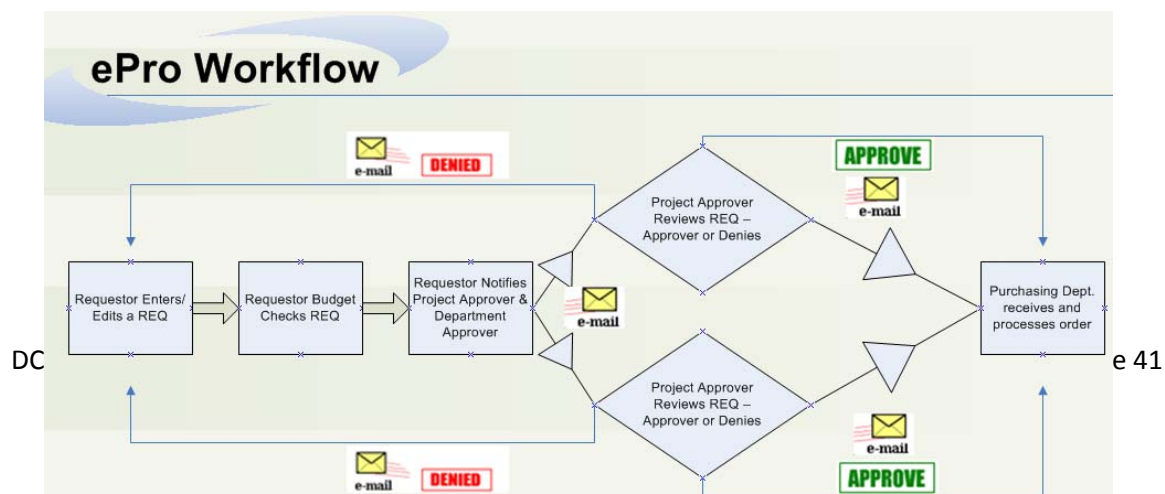
Requisition Approval

Requisition Approval Notifications

After a requisition has a Budget Status of Valid, the Requester must notify Preferred approvers to approve the requisition. There are two types of *approver roles* in PeopleSoft: **Department Approver** and **Project Approver**. Both the Department and Project Approver must approve a requisition before it can be processed to the Direct Connect vendor. **Once the requisition is approved, every 2 hours (7:30a.m. to 3:30p.m.), Direct Connect Requisitions are sent to the vendor chosen.**

Departments determine who can approve a requisition as Department Approver and Project Approver by setting up persons within the department to have these approver roles. The Project Approver is the authorized signature for the requisition, while the Department Approver is considered to be a reviewer. Either, or both, can *approve* or *deny* (i.e. disapprove) the Requester's requisition.

If the Requester's 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 also be approving on one of the approval roles for the department, ***the Requester still need to select their name*** from the Preferred Approver field. To make this clearer and to illustrate how the approval process is based on the role a Requester has in the department, the various approval scenarios are presented in this section.

Once the requisition has a Budget Status of Valid the **Comments to Approver, Preferred Project Approver, and Preferred Department Approver** fields will be available.

Confirmation

Requested For:	Deidre E Lenow - Stai Email	Number of Lines:	2
Requisition Name:	Office Supplies	Total Amount:	189.80 USD
Requisition ID:	0000544279	Comments To Approver:	<input type="text"/>
Business Unit:	HSCSA	*Preferred Project Approver:	<input type="text"/> 🔍
Priority:	Medium	*Preferred Department Approver:	<input type="text"/> 🔍
Budget Status:	Valid		

Requisition Approval

Office Supplies: Initiated

Project Approval

Not Routed
Multiple Approvers
Project Approval

Department Approval

Not Routed
Multiple Approvers
Department Approval

Comments entered will be viewable to both the Preferred Project and Department Approver. To select a Preferred Project and Department Approver, click the Look Up icon for each.

Comments To Approver:

*Preferred Project Approver:

*Preferred Department Approver:

Comments To Approver: MICHELLE AND DIANE, PLEASE APPROVE

*Preferred Project Approver: CARRANCO

*Preferred Department Approver: MENDOZAMM

Submit

Once the Preferred Approvers have been selected, click

Once the Submit button is clicked, the Preferred Approver fields and the Submit button will be grayed out. A request for approval will be sent to the selected Preferred Project and Department Approvers.

Priority: Medium

Budget Status: Valid

*Preferred Project Approver: CARRANCO

*Preferred Department Approver: MENDOZAMM

Requisition Approval

Office Supplies: Pending [View/Hide Comments](#)

Project Approval

Pending [Multiple Approvers](#)
Project Approval

Department Approval

Pending [Multiple Approvers](#)
Department Approval

Comment History

Submit Edit Requisition Apply Approval Changes Check Budget

[Requisition Quick View](#) [Manage Requisitions](#) [Create New Requisition](#)

An email will be sent to the Requester once the requisition has been either, approved or denied. If no action has been taken within 24 hours, an escalation email will be sent to the Requester that no action has been taken.

Keep in mind, if the Submit button is **not** selected, 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 that your requisition is complete and that you are committed to purchasing the items, you should not 'Submit' your requisition.

Chapter 3 Approval Scenarios

At most, 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 appropriate approval option.** To make this clearer, and to illustrate how the approval process is based on the role a Requester has in the department, the various approval scenarios are presented.

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 notifying 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 Department Approver** to approve the requisition. This can be done as soon as the Requester has a valid budget check for the requisition



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

Comments: If necessary, 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.



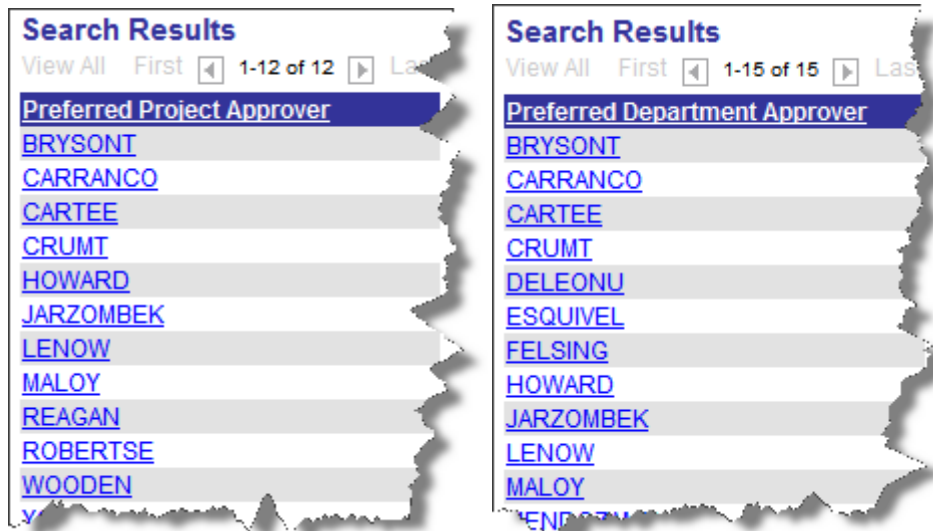
*The comment you enter here is seen only by **both** Preferred Project and Department Approver.*

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 list of available approvers. Make a selection.

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. Make a selection.

*Preferred Project Approver: 

*Preferred Department Approver: 



Submit: Click  once comments and Preferred Approvers have been selected.

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



Selecting SUBMIT sends notice to your Preferred Approvers. If SUBMIT is not selected 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 still choose his or her self as the Preferred Department Approver and complete the Department Approver action. The Requester must, however, still notify a Project Approver using the same steps outlined in Approval Scenario 1. The steps the Requester must complete are as follows:

Comments: If necessary, 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* link; this will cause the Approval Search Results screen to populate with list of available approvers. The Requester would select his/her own name from the approver list.

Notify a Project Approver: From the menu, click the Preferred *Department Approver* link; this will cause the Approval Search Results screen to populate with list of available approvers. Make a selection.

Submit: Click Submit once 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 will need to the Project Approver approval. The Requester must, however, still notify a Department Approver using the same steps outlined in Approval Scenario 1. The steps the Requester must complete are as follows:

Comments: If necessary, 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.

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. Make a selection.

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. The Requester would select his/her own name from the approver list.

Submit: Click Submit once approvers have been selected.

Approval Scenario 4: When a Requester is in Both Approver Roles

When a Requester is both in a role of Project Approver and Department Approver, the steps the Requester must complete are as follows:

Comments: If necessary, 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. The Requester should select his/her own name from the approver list.

Specify oneself as Project Approver: For the steps to be completed refer to Approval Scenario 1. The Requester would select his/her own name from the approver list.

Submit: Click Submit once 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 exact as Scenario 1:

Comments: If necessary, 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. Make a selection.

Preferred Department Approval: From the menu, click the Preferred *Department Approver* link, this will cause the Approval Search Results screen to populate with a list of available approvers. Make a selection.

Submit: Click Submit once 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. Once the requisition is approved by both approvers, Environmental Health and Safety will take the next approval action. **Notification does not have to be sent to EHS, it is automatic once both approvers have approved the requisition.**

Comments: If necessary, 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* link, this will cause the Approval Search Results screen to populate with list of available approvers. Make a selection.

Preferred Department Approval: From the menu, click the *Preferred Department Approver* link, this will cause the Approval Search Results screen to populate with list of available approvers. Make a selection.

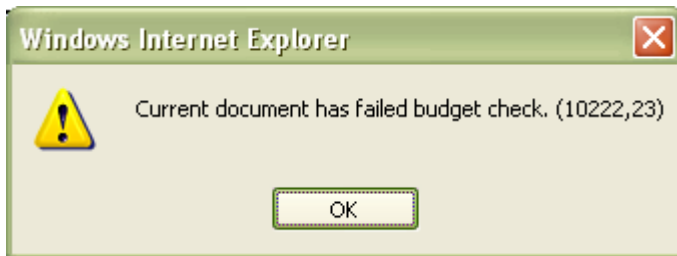
Submit: Click Submit once approvers have been selected.

Chapter 4

Special Situations- Direct Connect 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 problems with the setup of the budget for the Project ID you entered on the requisition.

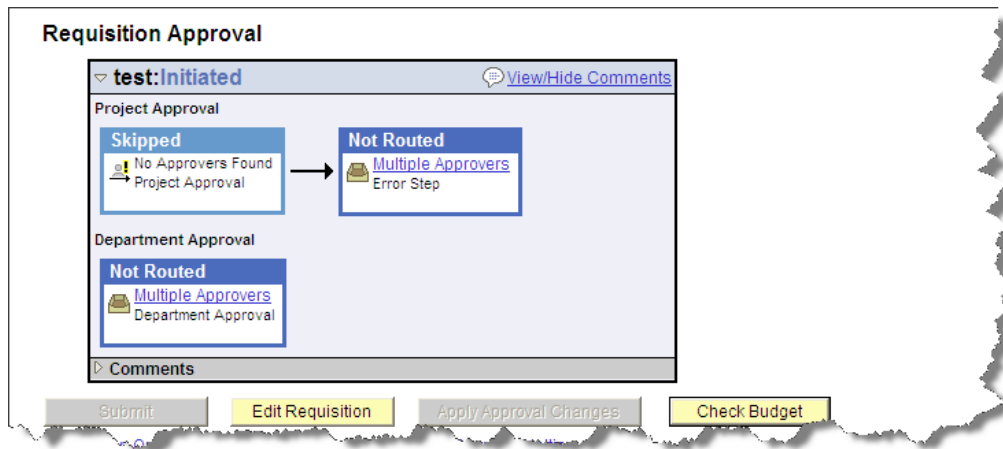
Solution:

- (1) To verify that your project 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 that the project 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. Check the Project End Date to determine whether the project has expired.

- (3) The source of funds will determine who to contact for assistance regarding problems with the setup of a project budget. 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



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 start from a new requisition
- (2) To verify the department the project id is assigned to:

HSC Custom Components → Self Service Inquiries → Project Chartfield

Radioactive/Hazardous Materials

If you are preparing a requisition which will include radioactive and/or hazardous materials, your requisition requires the approval of Environmental Health and Safety (EHS). The below information will discuss proper steps to take to ensure EHS receives the requisition to approve. The below path should be followed to access the Requisition Defaults page for Radioactive/Hazardous Checkbox.

HSC Custom Components → Create a Requisition → Requisition Defaults → Click the Rad/Haz checkbox

- Click the **Radioactive/Hazardous** checkbox on the Requisition Defaults page. This flags your requisition to Environmental Health and Safety. Once the Project and Department Approver have approved the requisition, it will be forwarded to Environmental Health and Safety (EHS).
- The Department Approver **does not** have to forward to EHS. EHS will be notified once **both** the Project and Department Approver have approved the requisition.

The screenshot shows the 'Create Requisition' form with the following fields and values:

- 1. Requisition Defaults** (Active tab)
- 2. Add Items and Services** (Inactive tab)
- 3. Review and Submit** (Inactive tab)
- Requester:** MENDOZAMM (Mendoza,Michelle Marie)
- Requisition Name:** Supplies - MMM (Origin: DCN)
- *Requisition Type:** DIRECT CONNECT (*Priority: Medium)
- Travel Type:** (Dropdown menu)
- Radioactive/Hazardous:** (Circled in red)
- *Vendor ID:** 0000017271 (EDX) (FISHER SCIENTIFIC EDX LOCATION)
- *Project:** 106310 (Contact Information: Mendoza,Michelle Marie; *Cntct Phone: 210/567-7777)
- *Ship To:** MAIN (Contact Information: MendozaMM@uthscsa.edu)
- *Fiscal Year:** 2011 (Contact Information: *Deliver To: 22VNS; Same As Contact)
- *Due Date:** 11/02/2010 (Contact Information: *Deliver Name: Mendoza,Michelle Marie; Deliver Phn: 210/567-7777)
- Continue** (Button)

The below snapshot shows the Project Approval as 'Pending' and the Additional Approvals as 'Not Routed.'

Requisition Approval

Confirmation

✓ 0000544023 Lab Supplies - Sp10 has been routed for further approval.

Review/Edit Approvers

Requisition Approval

▼ **Lab Supplies - Sp10: Pending** [View/Hide Comments](#)

Project Approval

Pending
[Multiple Approvers](#)
 Project Approver

Department Approval

Approved
 ✓ [Mendoza, Michelle Marie](#)
 Department Approval
 3/1/2010 - 12:20 PM

▶ **Comments**

Additional Approvals

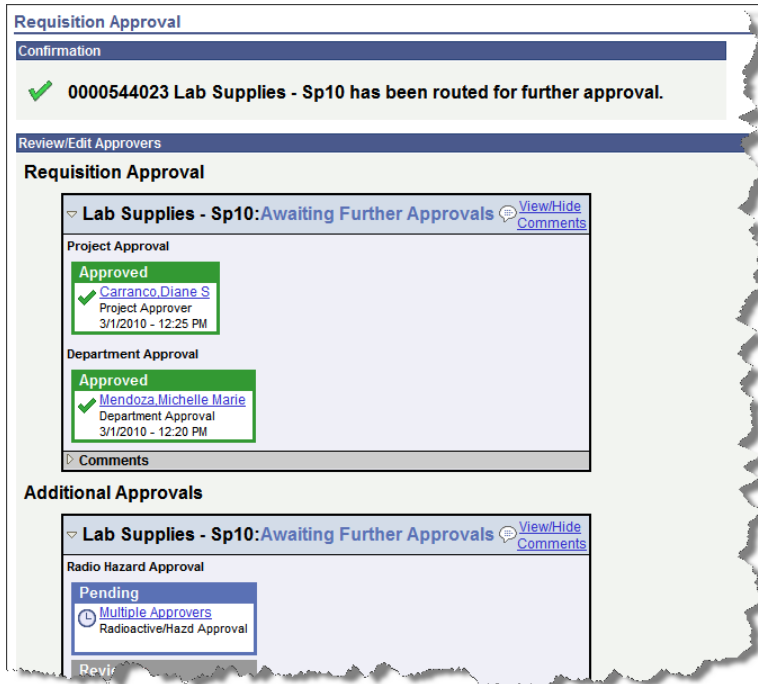
▼ **Lab Supplies - Sp10: Awaiting Further Approvals** [View/Hide Comments](#)

Radio Hazard Approval

Not Routed
[Multiple Approvers](#)
 Radioactive/Hazd Approval


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

Through UTHSCSA policy all Radioactive or Hazardous materials must be approved through Environmental Health & Safety.



How to Return to a Vendor's website after Saving

When ordering from a Direct Connect Vendor, it is very important to Save your requisition if you will be in the system for a long period of time, or if you will be ordering a large number of items. The below steps will show, in detail, how to Checkout of a Direct Connect Vendor's website, Save the requisition, and then return to continue ordering.

- Fisher Scientific:** will contain a Checkout link- [Checkout](#) Once clicked, you will be directed to a new page which will contain a Submit button- [Submit](#) . Clicking submit will return you to the PeopleSoft Financials requisition page and transfer all items into the requisition.


Shopping Cart [View Cart](#)

2 Items:

HMN IGA LAMBDA-UNLB	1
SNAKEEYE III BASE KIT	1

Total: \$3,572.53

[Checkout](#)



Resists v
Ideal for
speed C
(640 x 4
[See det](#)

Shopping Cart Account Number: **826785-001**

Fisher Cart

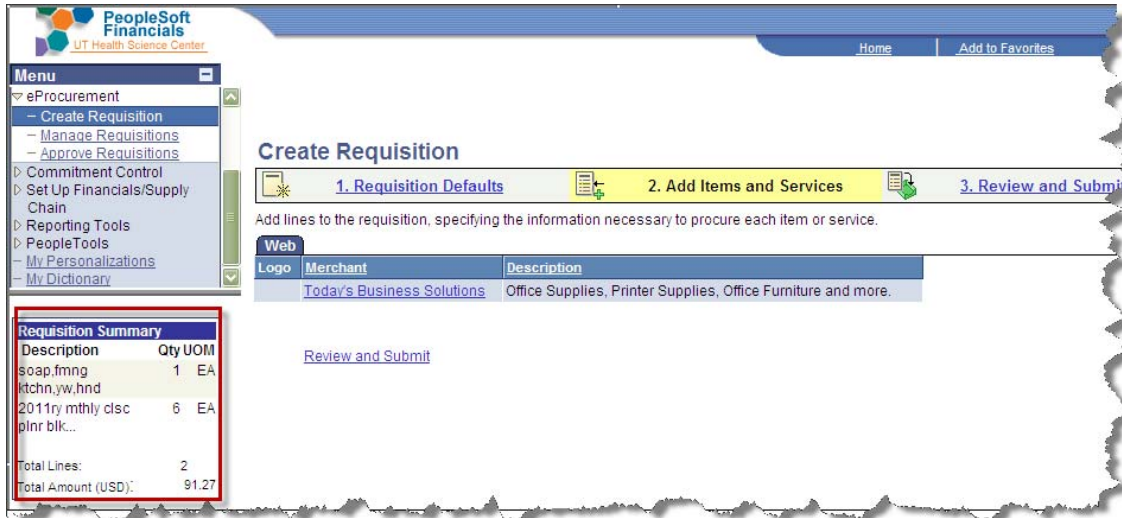
Description / Cat. No.	Qty. / Price	Availability	Sub-Total
OB0155L-01 HMN IGA LAMBDA-UNLB	1 Each for \$106.59	Shipping Direct from Supplier	\$106.59
19-168-322 SNAKEEYE III BASE KIT	1 Each for \$3,465.94	Shipping Direct from Supplier	\$3,465.94


Group Total: \$3,572.53

SHOPPING CART TOTAL: \$3,572.53

[Submit](#)

NOTE: Shipping and handling charges will be calculated at time of shipment based upon your account's terms and conditions.



- **Today's Business Solutions:** will contain a Checkout button-  Clicking Checkout will return you to the PeopleSoft Financials requisition page and transfer all items into the requisition.



Once items are transferred back onto your requisition, your Requisition Summary will update with the items selected for ordering.

PeopleSoft Financials
UT Health Science Center

Home | Add to Favorites

Menu

- eProcurement
 - Create Requisition
 - Manage Requisitions
 - Approve Requisitions
- Commitment Control
- Set Up Financials/Supply Chain
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary

Create Requisition

1. Requisition Defaults | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Web	Logo	Merchant	Description
		Today's Business Solutions	Office Supplies, Printer Supplies, Office Furniture and more.

[Review and Submit](#)

Requisition Summary

Description	Qty	UOM
soap,fmng	1	EA
ktchn,yw,hnd		
2011ry mthly clsc	6	EA
plnr blk...		
Total Lines:	2	
Total Amount (USD):	91.27	

To continue, click the Review and Submit link.

Create Requisition

1. Requisition Defaults | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Web	Logo	Merchant	Description
		Today's Business Solutions	Office Supplies, Printer Supplies, Office Furniture and more.

[Review and Submit](#)

At the Review and Submit page, click Save & preview approvals in order for a Requisition ID to be assigned.

Create Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UT HEALTH SCIENCE CENTER AT SA

Requester: Mendoza,Michelle Marie Requisition Type: DIRECT CONNECT

Requisition Name: *Currency: *Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	
1	SOAP,FMNG KTCHN,YW,HND	TODAYS BUSINESS SOLUTIONS	<input type="text" value="1.0000"/>	Each	3.97000	
2	2011RY MTHLY CLSC PLNR BLK 7X9	TODAYS BUSINESS SOLUTIONS	<input type="text" value="6.0000"/>	Each	14.55000	
					Total Amount:	91.2

Select All / Deselect All

Header Comments

You will be directed to the Confirmation page where the Requisition ID will be displayed.

*To add additional items to the Requisition, return to the Direct Connect Vendor's site by clicking Edit Requisition.

Confirmation

Requested For:	Mendoza,Michelle Marie	Number of Lines:	2
Requisition Name:	Office Supplies - Summer 2010	Total Amount:	91.27 USD
Requisition ID:	0000574964	Comments To Approver:	<input type="text"/>
Business Unit:	HSCSA	*Preferred Project Approver:	<input type="text"/>
Priority:	Medium	*Preferred Department Approver:	<input type="text"/>
Budget Status:	Not Checked		

Requisition Approval

Office Supplies - Summer 2010:Initiated

Project Approval

Not Routed

 [Multiple Approvers](#)
Project Approval

Department Approval

Not Routed

 [Multiple Approvers](#)
Department Approval

[Requisition Quick View](#) [Manage Requisitions](#) [Create New Requisition](#)

You will be taken back to the Review and Submit page. Click on an item description hyperlink to return to the Direct Connect Vendor's (Today's Business Solutions or Fisher Scientific) website if you would like to add additional items to your order.

Edit Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UT HEALTH SCIENCE CENTER AT SA Requisition ID: 0000602202
 Requester: Mendoza,Michelle Marie Requisition Type: DIRECT CONNECT
 Requisition Name: *Currency: *Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	2011RY TWO-COLOR DSK PD.22X17	TODAYS BUSINESS SOLUTIONS	4.0000	Each	3.43000	13.72
2	PAPER MATE GEL BLUE BOLD	TODAYS BUSINESS SOLUTIONS	4.0000	Dozen	8.05000	32.20
Total Amount:						45.92 USD

Select All / Deselect All

Header Comments

How to Continue Shopping with a saved Order – Today’s Business Solutions

When ordering from Today’s Business Solutions, if you exit the PeopleSoft Financials system, or leave the Today’s Business Solutions site, after items have been added to your Shopping Cart, there is a possibility your order will still be available when you return. To confirm if you have an order pending, when you create a new requisition and navigate back to the Today’s Business Solution’s site, you will notice the *Create New Office Products Order* is not available to you. What will be available is the option to *continue shopping* or *delete order*.

PeopleSoft Financials
UT Health Science Center

TODAY'S
BUSINESS SOLUTIONS

Manage Orders Your Profile

Manage Orders
Hello, Michelle Marie Mendoza.

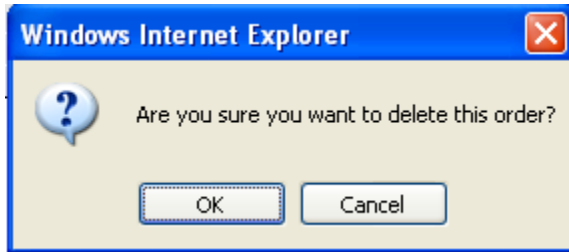
2010 Holiday Delivery Sched

Orders Placed On: Thursday, December 23

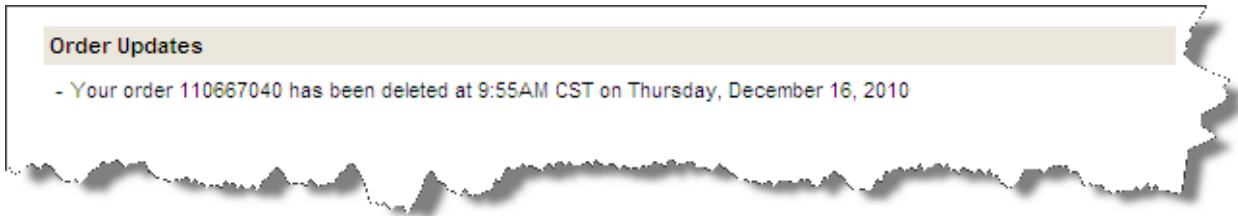
Shopping menu items:
 (highlighted)
 (disabled)

Clicking on the *continue shopping* option will take you back to your last order. Clicking on *delete order* will allow the *Create New Office Products Order* link to become available.

If *delete order* is clicked, a window will display, asking to confirm to delete the order.



Once OK is clicked, the **Order Updates** will display information regarding the order number and a date and time stamp of when the order was deleted.



Chapter 5 Manage a Requisition

Once a requisition has initially been added and saved, you can review the requisition, or if you need to make any changes to the requisition, you will use menu option **Manage Requisitions**. Keep in mind, a Requisition ID must be assigned in order for a Requisition to be viewed for later retrieval.

Direct Connect Requisitions with a status of *Open* or *Pending* and *Approved* can be edited, as long as a requisition has not been sourced to a Purchase Order (PO) or received an RFQ. 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:

- You add a requisition but decide to finish it later.
- You already submitted your requisition to your approvers, but still need 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
- Your requisition is denied by an approver and correction are needed
- You want to Cancel your requisition

Retrieve a Requisition

When retrieving a requisition the below path should be followed:

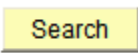
eProcurement → Manage Requisitions → Search for Requisition



1. Search for your requisition

This page permits searching using the below information.

- **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 including all leading zeros

2. Enter a single search criterion (Requisition ID is preferred), or you can combine search criteria to limit the list of requisitions found by the search.
3. After entering the search criteria, click . A listing of requisitions will be displayed



If you do not have access to information which 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 selecting the 'expand' icon.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000544029	Office Supplies	HSCSA	03/02/2010	Open	Not Chk'd	108.00USD	<Select Action...> Go
0000544028	0000544028	HSCSA	03/01/2010	Open	Valid	814.50USD	<Select Action...> Go
0000544023	Lab Supplies - Sp10	HSCSA	03/01/2010	Pending	Valid	7,500.00USD	<Select Action...> Go
0000544016	new	HSCSA	03/01/2010	Pending	Valid	814.50USD	<Select Action...> Go
0000544014	New Office Supplies	HSCSA	03/01/2010	Open	Valid	814.50USD	<Select Action...> Go
0000544003	0000544003	HSCSA	02/26/2010	Approved	Valid	12.46USD	<Select Action...> Go

The Requisition Lifespan, highlighted below, shows an example of a Requisition which does not contain a Budget status of Valid, but still has a status of Open. To review your requisition, the Req Quick View links is available, or simply click the Line item information to view comments regarding the requisition.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000544029	Office Supplies	HSCSA	03/02/2010	Open	Not Chk'd	108.00USD	<Select Action...> Go

Requester: Deidre E Lenow - Stai Email **Entered By:** Deidre E Lenow - Stai Email **Priority:** Medium **Cancel**

Request Lifespan: [Req Quick View](#) **Travel DTTM:** **Cancel**

Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	Lab Coats	Open	54.00000	USD	2.0000	EA	UNKNOWN

0000544028	0000544028	HSCSA	03/01/2010	Open	Valid	814.50USD	<Select Action...> Go
------------	------------	-------	------------	------	-------	-----------	-----------------------

Retrieve a Requisition to Edit

As long as a requisition ***has not been sourced to a Purchase Order or given an RFQ***, the requisition can be edited, even if it has already passed a Check Budget or been approved. Requisitions having statuses of *Open, Cancelled, Denied, Approved or Pending* can be updated.

If a Requisition has a valid Check Budget, is submitted and has been approved, it can be edited. Although many requisitions will likely glide through the approval process without incident, some requisitions will be denied. If denied, the Requester will need to make changes. In many cases these changes will necessitate that the Requester, again, Check Budget and then Submit to the Preferred Approvers.

Prior to a Check Budget, none of the Project's budget dollars are set aside, or to use the accounting term, pre-encumbered; however, selecting Check Budget causes budget dollars to be pre-encumbered. Accounting entries are created, which if not properly changed by the system, would result in Project balances being inaccurate.

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

An important item to remember when editing a Requisition is when a monetary amount regarding the Project Budget is adjusted; a Requester must re-Check Budget and notify the Preferred Approvers once again. If the approvers are not notified, meaning, if the Submit button is not selected, the requisition will not be available within the Approve Requisition link.

To retrieve a requisition to update, follow the same steps shown in the previous section, *Retrieve a Requisition to Review*.

eProcurement → Manage Requisitions → Search for Requisition

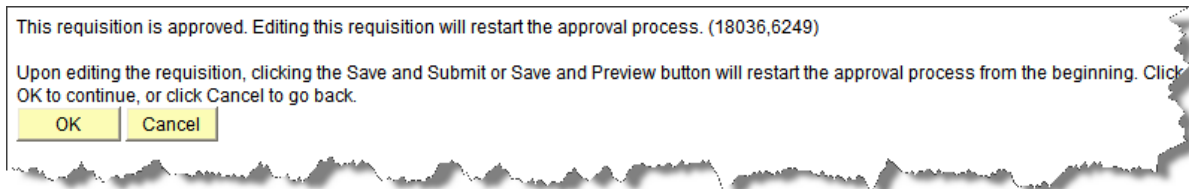
1. Search for your requisition
2. To edit, click the '**Edit Requisition**' option
3. Click Go

▷	0000543968	0000543968	HSCSA	02/24/2010	Approved	Valid	53.88USD	<Select Action..>	Go
▷	0000543859	New Computers for Employee	HSCSA	02/17/2010	Approved	Valid	3,652.73USD	<Select Action..>	Go

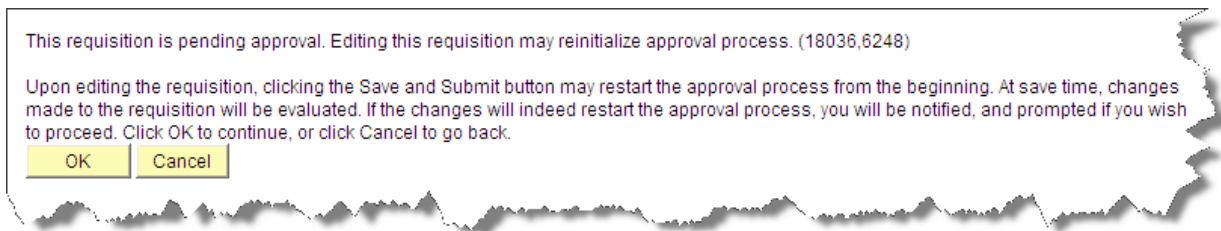
[Create New Requisition](#)

<Select Action..>
 Cancel Requisition
 Copy Requisition
Edit Requisition
 View Approvals

If a Requisition has been approved, the below message will display, warning you that making changes may re-start the approval process, requiring the Approvers once again, 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 may re-start the approval process, requiring you, the Requester, to re-submit the Requisition.



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.



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

Copying a Requisition

The copying feature is not available for Direct Connect Requisitions.

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 and return the desired amount of funds to the Project budget.

If the requisition has been submitted to the approvers and approved, the Cancel option will depend upon whether or not a Purchase Order (PO) has been dispatched or an RFQ assigned. If either has occurred, Cancel will not be an option.

If a Requisition ID has not been assigned to the Requisition, simply exit the session and the Requisition will not be available for retrieval. However, at the minimum, once a Requisition has been saved, and a Requisition ID assigned, the requisition must be cancelled if it is no longer needed.

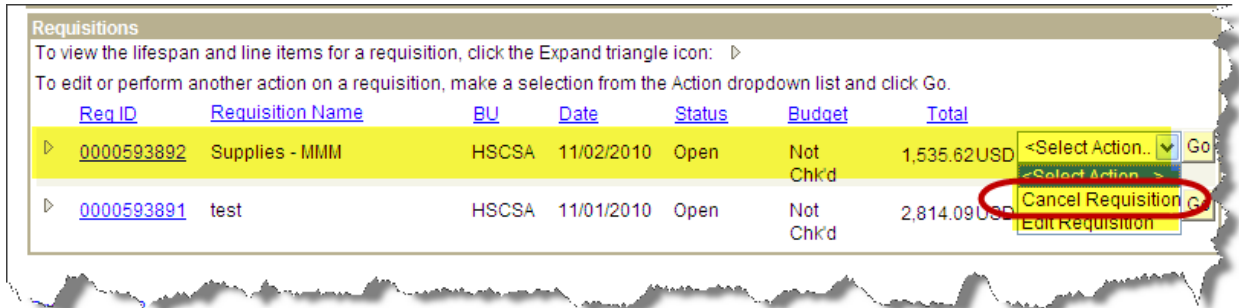


If you need to change the Project ID, edit the requisition and make the adjustment. Updating the Project ID is allowed.

To Cancel a requisition, follow the below steps:

eProcurement → Manage Requisitions → Search for Requisition

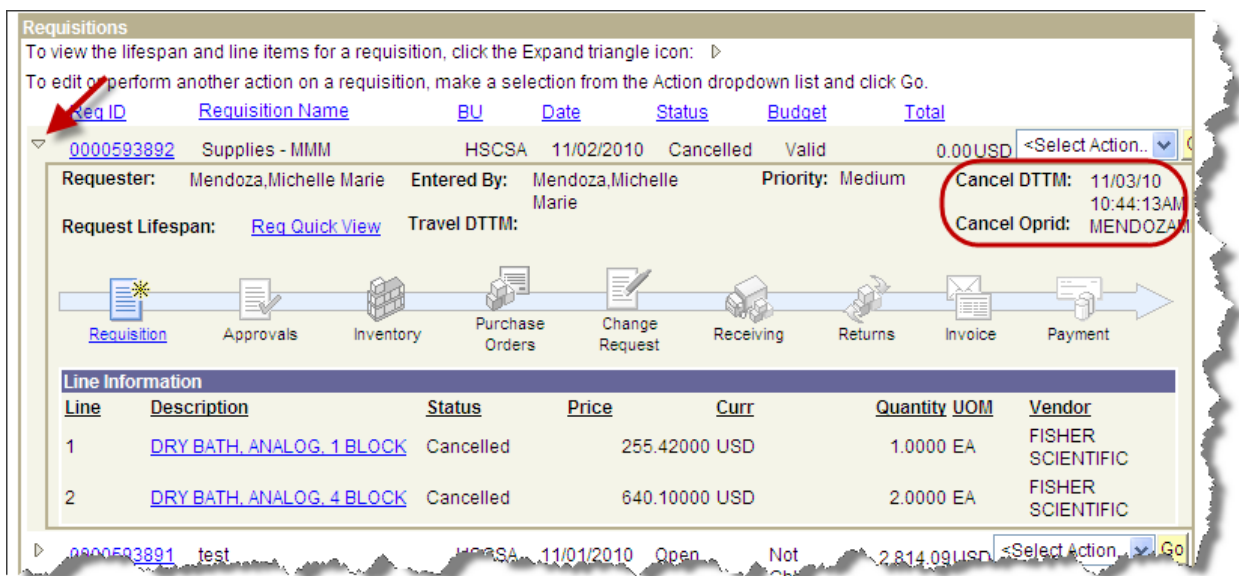
1. Search for your requisition
2. Choose the <Select Action> option '**Cancel Requisition**'
3. Click '**Go**'
4. Confirm the Cancellation



Confirm the requisition to be cancelled by clicking **Cancel Requisition** in the new window.



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



Once a requisition has been cancelled, it will remain available in the history for about a 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 time when a requisition has a status of Complete, the Requisition cannot be 're-opened'.

Updating a Cancelled Requisition

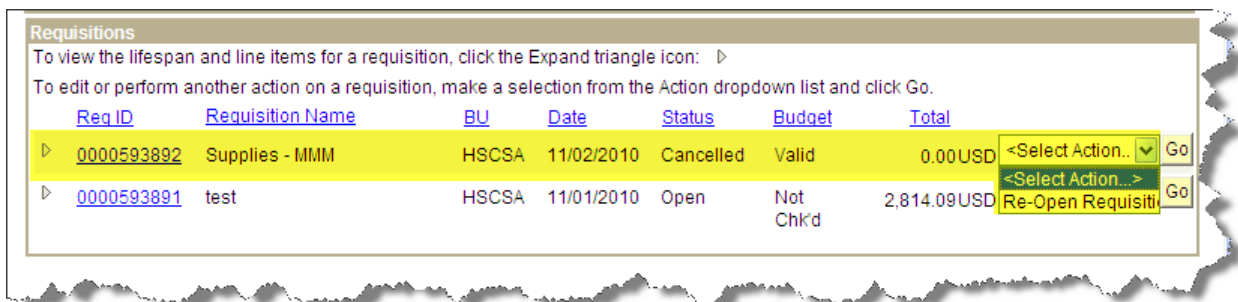
A requisition which has been cancelled will not continue through the requisition business process. The next business day, any requisitions which were cancelled will then contain a status of Complete. However, a requisition which has been 'Cancelled' can be updated, as long as the status has not processed into Complete.

To do so, a <Select Action> option of Re-Open is available. When re-opening a cancelled requisition to edit, most fields within the requisition will be available for editing.

The below steps should be followed when updating a Cancelled requisition:


eProcurement → Manage Requisitions → Search for Requisition

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



The screenshot shows a table titled "Requisitions" with the following columns: Reg ID, Requisition Name, BU, Date, Status, Budget, Total, and an Action dropdown menu. The first row is highlighted in yellow and has the following data: Reg ID: 0000593892, Requisition Name: Supplies - MMM, BU: HSCSA, Date: 11/02/2010, Status: Cancelled, Budget: Valid, Total: 0.00USD. The second row has the following data: Reg ID: 0000593891, Requisition Name: test, BU: HSCSA, Date: 11/01/2010, Status: Open, Budget: Not Chk'd, Total: 2,814.09USD. The Action dropdown menu for the first row is open, showing options: <Select Action.., <Select Action..>, and Re-Open Requisition. A "Go" button is visible next to the dropdown menu.


Reg ID	Requisition Name	BU	Date	Status	Budget	Total	Action
0000593892	Supplies - MMM	HSCSA	11/02/2010	Cancelled	Valid	0.00USD	<Select Action..
0000593891	test	HSCSA	11/01/2010	Open	Not Chk'd	2,814.09USD	<Select Action..> Re-Open Requisition

4. A page with the requisition information and an information message,  will display.

Requisition Details for: Mendoza,Michelle Marie

Business Unit: HSCSA Date: 11/02/2010
Requisition Name: Supplies - MMM Status: Cancelled
Requisition ID: 0000593892 Total: 0.00

Line	Item Description	Status	Price	Qty	Total
1	DRY BATH. ANALOG. 1 BLOCK	Cancelled	255.42000 Each	1.0000	\$255.42
2	DRY BATH. ANALOG. 4 BLOCK	Cancelled	640.10000 Each	2.0000	\$1280.20

 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](#)

[Reopen Requisition](#)

5. Click the [Reopen Requisition](#) button. Once **Reopen Requisition** is clicked, the Requisition is available for editing.
6. Search for your requisition
7. Choose the option '**Edit Requisition**' using <Select Action>
8. Edit your requisition as necessary. Information which can be changed:
 - Project ID
 - Vendor Information
 - Line Item information
 - Quantity
 - Price

Once the requisition is saved and 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.

Delete Requisition Lines after Approval Notifications

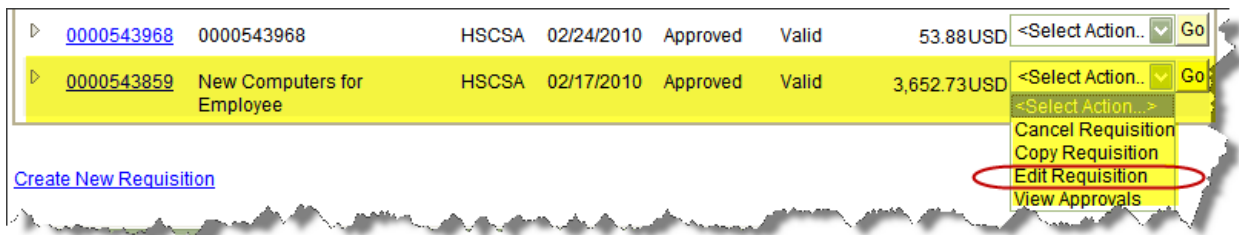
As long as a requisition has not been sourced to a Purchase Order (PO) or submitted to the Direct Connect Vendor for processing, the Requester can delete a line. Following the Requester's deletion of

the line, the Requester will need to, once again, **Check Budget** and **Submit** the requisition for approval to the Preferred Approvers.

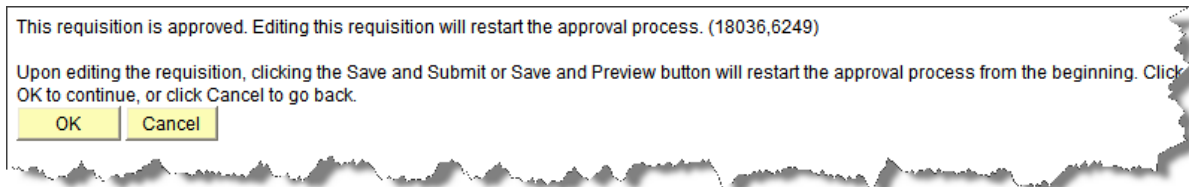
To Delete lines from a requisition, follow the below steps:

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 may re-start the approval process, requiring the Approvers once again, approve the requisition.



4. Navigate to the Review and Submit page, select the line(s) you would like to delete.

Edit Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UT HEALTH SCIENCE CENTER AT SA Requisition ID: 0000593893
 Requester: Deidre E Lenow Requisition Type: DIRECT CONNECT
 Requisition Name: *Currency: *Priority:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input checked="" type="checkbox"/>	LTR SZ RETRIEVABLE LAMNTION	TODAYS BUSINESS SOLUTIONS	<input type="text" value="2.0000"/>	Package	15.66000	31.32
<input type="checkbox"/>	AWARD PLAQUE BLACK 8.5X11	TODAYS BUSINESS SOLUTIONS	<input type="text" value="5.0000"/>	Each	4.48000	22.40
Total Amount:						53.72 USD

Select All / Deselect All

Header Comments

5. A warning message will display. Click

Are you sure you want to delete the selected line(s)? (18036,2315)

6. A second warning message will display if the Requisition has been Approved or if the Preferred Approvers were notified. Click

Saving modifications to this requisition will cause the approval process to be terminated. (18036,827)

The requisition you are saving has already entered the approval process. By clicking OK, any previous approvals will be void and the approval process will terminate, leaving this requisition in 'Open' status. To go back to the requisition, click Cancel.

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.

Cancel a Line after Approval Notification

Canceling a line is similar to Deleting a line, it places funds back onto the Project and does not order the item. The Cancel Line option is beneficial from a documentation standpoint since it shows 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. Select the Expand Icon



Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▷

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▷ 0000599232	Office Supplies	HSCSA	10/29/2010	Open	Valid	58.95USD	<Select Action.. > Go
▷ 0000599228	Office Supplies - rsc/mmm	HSCSA	10/28/2010	Pending	Valid	477.23USD	<Select Action.. > Go

From the Requisition Lifespan each line will contain a Red 'X' to the right, a Cancel Line option. By selecting 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.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000599232	Office Supplies	HSCSA	10/29/2010	Open	Valid	58.95USD	<Select Action..> Go
0000599228	Office Supplies - rsc /mmm	HSCSA	10/28/2010	Pending	Valid	477.23USD	<Select Action..> Go

Requester: Carranco,Diane S Entered By: Carranco,Diane S Priority: Medium Cancel DTTM:

Request Lifespan: [Reg Quick View](#) Travel DTTM: Cancel Oprid:

Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	2011RY MNTH PKNOTES WALL 15X...	Pending Approval	9.02000	USD	4.0000	EA	TODAYS BUSINESS SOLUTIONS
2	10K GOLD FILLED BALLPOINT PE...	Pending Approval	29.41000	USD	15.0000	EA	TODAYS BUSINESS SOLUTIONS

[Create New Requisition](#)

Once the Requisition Line has been Cancelled the line status will display Cancelled. Next, you will need to click the Check Budget from within the requisition.

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 clicked, the approver fields will remain grayed out.

Confirmation

Requested For: Carranco, Diane S Number of Lines: 2
 Requisition Name: Office Supplies - rsc /mmm Total Amount: 441.15 USD
 Requisition ID: 0000599228
 Business Unit: HSCSA Comments To Approver:
 Priority: Medium *Preferred Project Approver: LENOW
 Budget Status: Not Checked *Preferred Department Approver: CARRANCO

Requisition Approval

Office Supplies - rsc /mmm: Pending

Within the Manage Requisitions page, the line status will display Cancelled and the Budget will now display Valid.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000599232	Office Supplies	HSCSA	10/29/2010	Open	Valid	58.95USD	<Select Action.. Go
0000599228	Office Supplies - rsc /mmm	HSCSA	10/28/2010	Pending	Valid	441.15USD	<Select Action.. Go

Requester: Carranco, Diane S Entered By: Carranco, Diane S Priority: Medium Cancel DTTM:
 Request Lifespan: [Req Quick View](#) Travel DTTM: Cancel Oprid:

Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	2011RY MNTH PKNOTES WALL 15...	Cancelled	9.02000	USD	4.0000	EA	TODAYS BUSINESS SOLUTIONS
2	10K GOLD FILLED BALLPOINT PE...	Pending Approval	29.41000	USD	15.0000	EA	TODAYS BUSINESS SOLUTIONS

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**.

- A. For requisitions with an Approved status, this procedure will not work once the requisition has been sourced. **Sourcing** refers to the point at which the requisition lines are being processed into an inventory order, PO, or RFQ (depends on the requisition type). Once 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.
- 1. Search for the requisition within Manage Requisitions. In this example, we will select a requisition pending approval.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To: Project:

Requester: Entered By: Vendor ID:

Department: Req Type:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▶

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▶ 0000567114	3M / Basic	HSCSA	06/11/2010	Pending	Valid	300.00 USD	<Select Action..

Note: We can tell no lines have been sourced for this requisition because the requisition hasn't yet been approved yet. Had it been approved, we'd make certain the appropriate icon in the requisition lifespan was still gray. For example, if this were a General Stores requisition, we'd look at the Inventory icon. For a Basic or Direct Connect requisition, we'd confirm that the Purchase Orders icon was still gray.

- 2. From the Select Action box, click **Edit Requisition**, and then click the **Go** button.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:

Requisition ID:

Date From:

Requester:

Request Name:

Request Status:

Date To:

Entered By:

Department:

Budget Status:

Project:

Vendor ID:

Req Type:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
▾ 0000567114	3M / Basic	HSCSA	06/11/2010	Pending	Valid	300.00USD	<input type="button" value="Edit Requisition"/> <input type="button" value="Go"/>

[Create New Requisition](#)

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

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

Upon editing the requisition, clicking the Save and Submit button may restart the approval process from the beginning. At save time, changes made to the requisition will be evaluated. If the changes will indeed restart the approval process, you will be notified, and prompted if you wish to proceed. Click OK to continue, or click Cancel to go back.

4. Click **Requisition Defaults**.

Edit Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UT HEALTH SCIENCE CENTER AT SA Requisition ID: 0000567114

Requester: Carranco,Diane S Requisition Type: BASIC REQUISIT

Requisition Name: *Currency: *Priority:

5. Click the **Continue** button.

Edit Requisition

1. Requisition Defaults 2. Add Items and Services 3. Review and Submit

Specify and Modify requisition name, requester, and other information that applies to the entire requisition.

Requester: Carranco,Diane S Requisition ID: 0000567114

Requisition Name: Origin: DCN

*Requisition Type: *Priority:

Travel Type:

Radioactive/Hazardous

*Vendor ID: TODAYS BUSINESS SOLUTIONS
EDX LOCATION

*Project:

*Ship To:

*Fiscal Year:

*Due Date:

Contact Information

*Cntct Name: *Cntct Phone:

*Cntct Email:

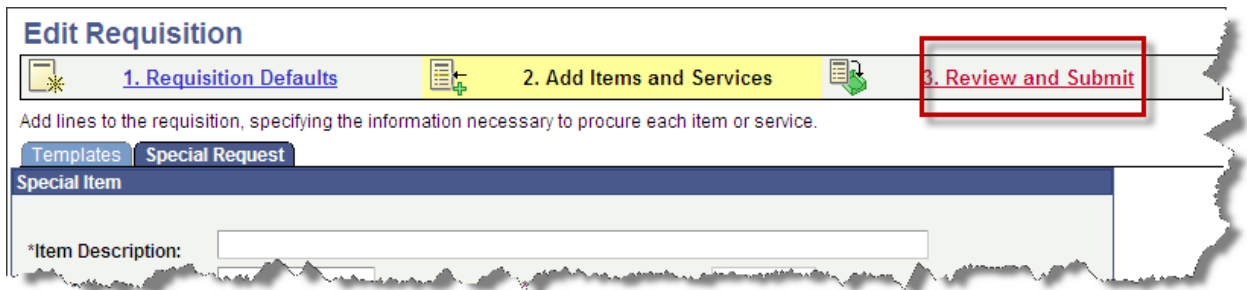
*Deliver To: Same As Contact

*Deliver Name: Deliver Phn:

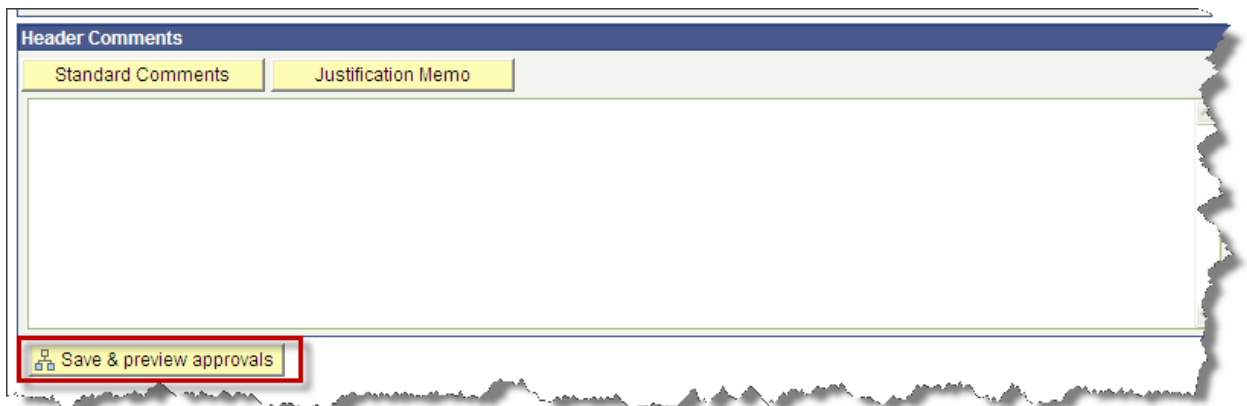
6. The following message appears. Click **Yes**.



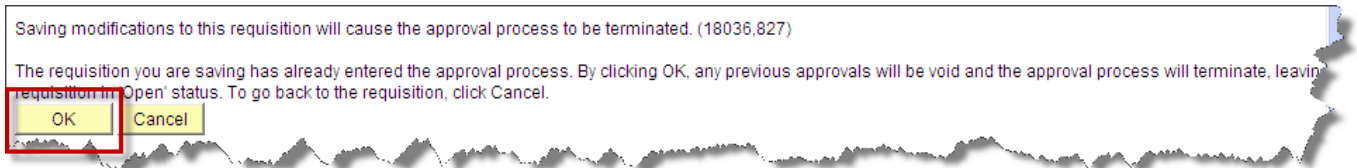
7. Leave this page blank and click **Review and Submit**.



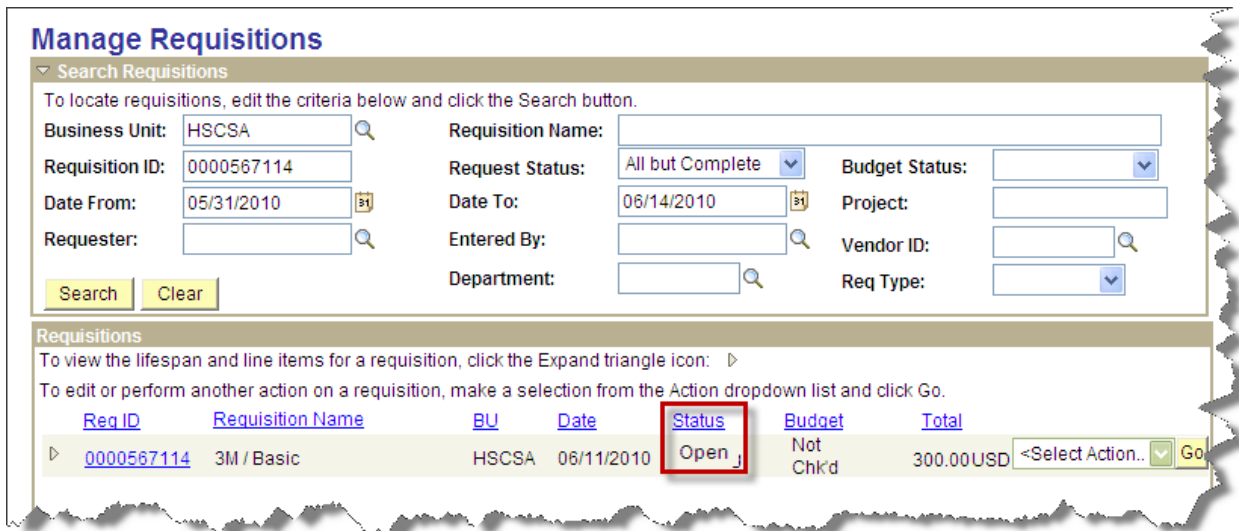
8. Click the **Save & Preview Approvals** button located at the lower, right corner of the Review and Submit page.



- 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.



- At this point, the requisition will have an **Open** status. You can confirm this in Manage Requisitions.



Retrigger Approval Notifications

Once a Requisition has been Submitted to be approved, email approval notifications are routed to the Preferred Project and Department Approvers which were selected. The Approvers selected are the approvers whom the Requester intends to review and approve the requisition. There may be a time when the Requester will need to resubmit approval notifications so that a different Preferred Project

Approver receives the email notification and is listed as a Preferred Approver. By re-triggering the approval email notification(s) the Requester will be able to select new Preferred Approvers.

The following steps should be followed to re-trigger email notifications:

eProcurement → Manage Requisitions → Search for Requisition

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

You will be taken to the Review and Submit page.

4. Click the Requisition Defaults link
5. Click the Continue button
6. Click the Yes button to re-trigger approvals



Clicking 'Yes' will allow the Requester to once again, Check Budget, enter new comments to the Preferred Approvers, and select the new Preferred Approvers for the requisition.

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

The Confirmation page will display. The Requester will be able to again, 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 does not actually print a requisition or purchase order. Instead, it will generate an “e-REQ” (short for electronic Requisition) that is sent via e-mail to the person requesting it. The e-REQ uses a PDF file format, so it 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 even a partially completed requisition.

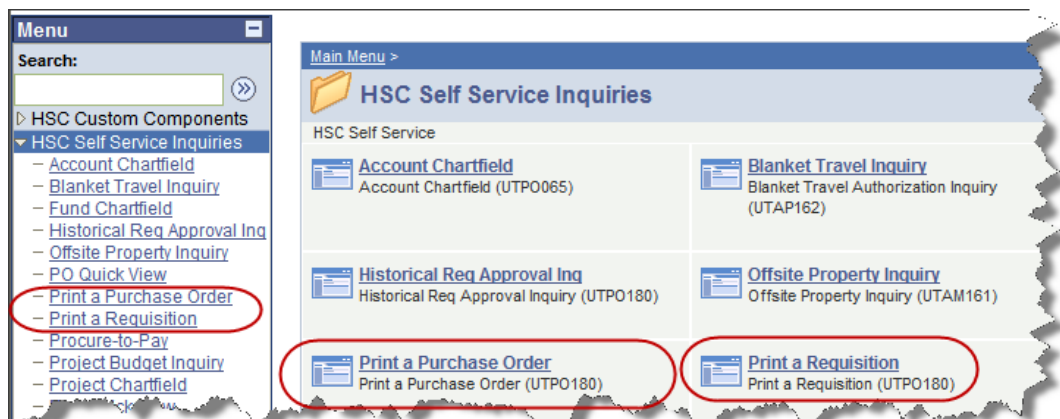
If a user has access to only department B1234 in PeopleSoft, then the user will be granted access to request an e-REQ for only requisitions or purchase orders prepared by department B1234. Furthermore, any user who is a Requester or approver for department B1234 has access to all of B1234’s requisitions and can therefore request an e-REQ for any B1234 requisition 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, follow the below steps:

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

The screenshot shows a web interface for searching purchase orders. At the top, there is a tab labeled 'Purchase Order Print' and a heading 'Purchase Order Print'. Below this is a section titled 'Search Criteria' with a light green background. The instructions 'Enter Search Criteria and Click the Search Button' are displayed. The form contains two columns of search fields, each with a magnifying glass icon. The left column includes: 'Business Unit' (with 'HSCSA' entered), 'PO ID', 'Requisition ID', and 'Entered By'. The right column includes: 'Department', 'Requisition Date' (with a calendar icon), 'Vendor ID', 'Vendor ID PO', and 'Project'. At the bottom of the search criteria section are two buttons: 'Search' and 'Clear'. Below the search criteria is a light green banner with an information icon and the text 'Enter search criteria to find POs.'

Requisition Print

Requisition Print

Search Criteria

Enter Search Criteria and Click the Search Button

Business Unit:

Department:

Requisition ID:

Requisition Date:

Status:

Vendor ID:

Entered By:

Project:

Enter search criteria to find Requisitions.



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.

Requisition ID:



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

Select Requisitions

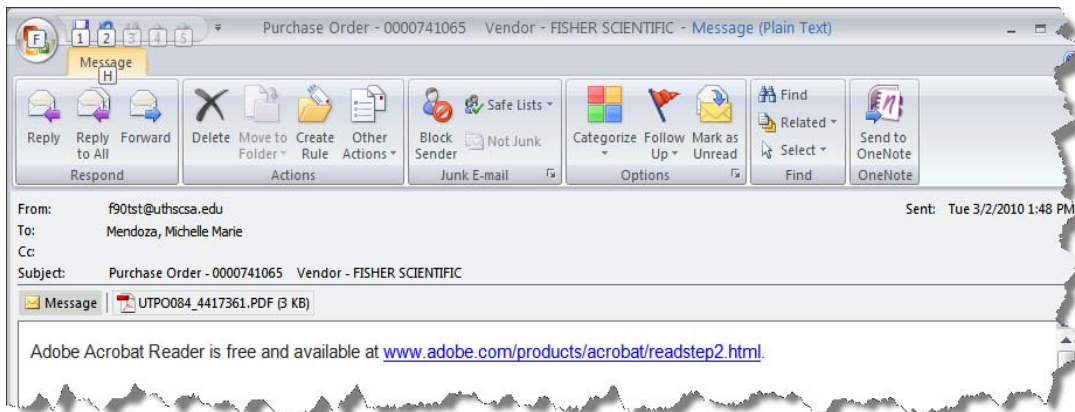
Find | View 100 | First 1-10 of 8337 Last

Sel	Business Unit	Requisition ID	Requisition Status	Entered By	Project	Department	Requisition Date	Vendor ID
<input type="checkbox"/>	HSCSA	0000544220	Open	CARRANCO	123093	T5700	03/12/2010	0000007116
<input checked="" type="checkbox"/>	HSCSA	0000544219	Approved	CRUMT	106310	T5700	03/11/2010	0000017271
<input checked="" type="checkbox"/>	HSCSA	0000544218	Approved	CRUMT	106310	T5700	03/11/2010	0000017271
<input checked="" type="checkbox"/>	HSCSA	0000544217	Approved	CRUMT	106310	T5700	03/11/2010	0000017271
<input type="checkbox"/>	HSCSA	0000544216	Approved	CRUMT	106310	T5700	03/11/2010	0000017271
<input checked="" type="checkbox"/>	HSCSA	0000544215	Approved	CRUMT	106310	T5700	03/11/2010	0000045050
<input type="checkbox"/>	HSCSA	0000544214	Approved	CRUMT	106310	T5700	03/11/2010	0000045050
<input type="checkbox"/>	HSCSA	0000544213	Approved	STAI	106310	T5700	03/11/2010	0000017271
<input type="checkbox"/>	HSCSA	0000544212	Approved	SAMS	105775	B5450	03/11/2010	0000000166
<input type="checkbox"/>	HSCSA	0000544211	Approved	STAI	106310	T5700	03/11/2010	0000017271

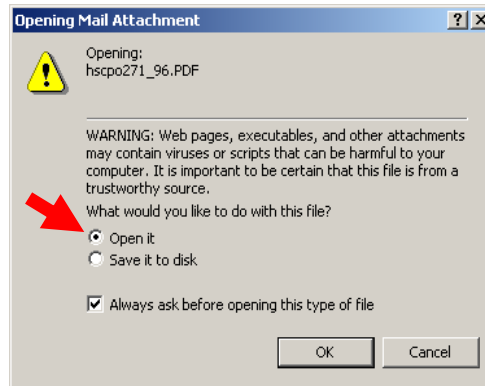
2. Select the requisition(s) or purchase order (s) you want e-mailed to you by clicking the **Send** pushbutton.
3. You will see the following messages similar to those appearing below...



You will receive a message which, when opened, will look similar to the illustration appearing below.



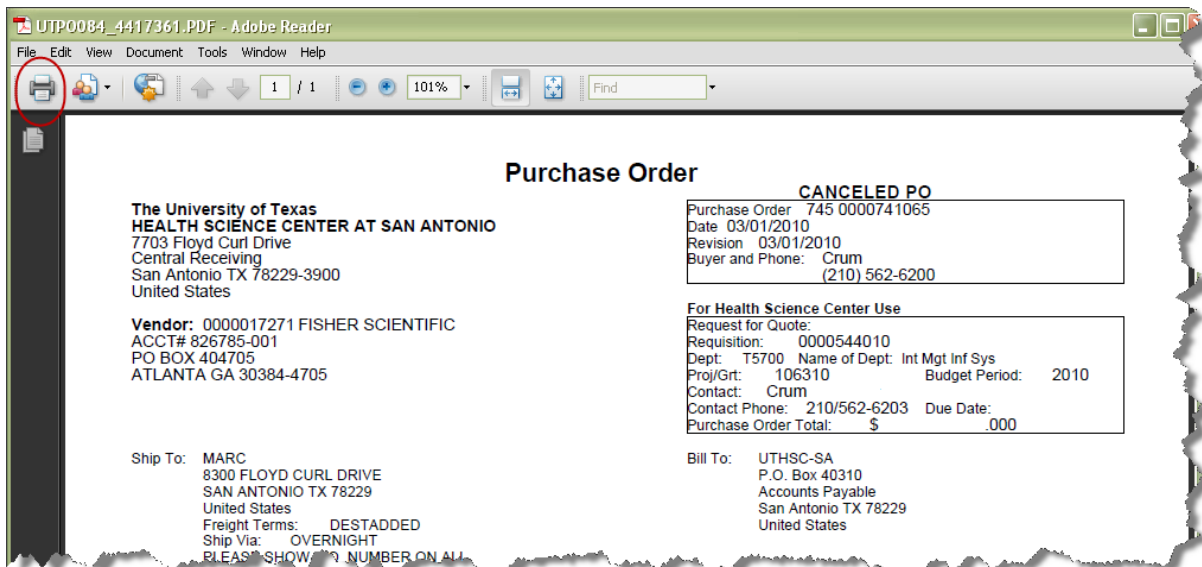
Double-click the PDF attachment appearing in the e-mail message. You may be presented with a message. Click the option to “Open it” and then click the **OK** pushbutton.



The attachment will open using Adobe Acrobat® Reader™ (see illustration).



To print the requisition or the purchase order, click the button on the Adobe Acrobat® Reader™ toolbar.



Chapter 7 Self Service Inquiries

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 required prior approval by the departmental ACE is the Project Budget Inquiry.

Within Self Service Inquiries, three new inquiries are now available.

- 1) Blanket Travel Inquiry – this inquiry provides a public listing, by department, of all individuals authorized for Blanket Travel during the 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 below steps:

HSC Self Service Inquiries → Procure to Pay

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.

Procure To Pay Inquiry

Business Unit: HSCSA

Doc Type:

Document ID:

Vendor ID:

Vendor ID PO:

PO
PYMT
REQ
VCHR

3. Click the 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 button to bring up the new information. The screen will not automatically update.

Procure To Pay Inquiry

Business Unit: HSCSA

Doc Type: REQ


Document ID: 0000543927

Vendor ID: 0000017271 FISHER SCIENTIFIC

Vendor ID PO: 0000017271 FISHER SCIENTIFIC

Buyer: Crum, Teresa M

Requisition ID	Purchase Order	Voucher ID	Check Nbr
0000543927 <input type="button" value=""/>	0000741003 <input type="button" value=""/>	<input type="button" value="Find View All"/>	First <input type="button" value="1 of 1"/> Last <input type="button" value=""/>

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:

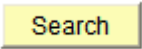
- A purchase order has not yet been assigned to the requisition
- A voucher has not been processed and sent to Accounting
- A payment has not been made on this order

Project Budget Inquiry

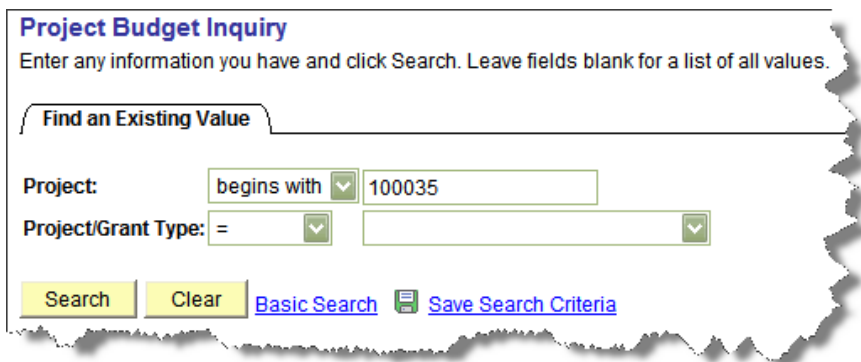
Though all Web Req users will see the menu option for the Project Budget Inquiry on their portal menu by default, **access must be granted by the departmental ACE** on an individual basis using the ACE Tools Requisition Security, before an individual can inquire on a project id.

To access Project Budget Inquiry, follow the below steps:

HSC Self Service Inquiries → Project Budget Inquiry

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

This page shows real-time balances for the Project ID



The screenshot shows a web form titled "Project Budget Inquiry". Below the title is the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." The form has a section titled "Find an Existing Value" with a rounded border. Inside this section, there are two rows of input fields. The first row is labeled "Project:" and has a dropdown menu set to "begins with" and a text input field containing "100035". The second row is labeled "Project/Grant Type:" and has a dropdown menu set to "=" and an empty text input field. Below the input fields are four buttons: "Search" (yellow), "Clear" (white), "Basic Search" (blue text with a magnifying glass icon), and "Save Search Criteria" (blue text with a floppy disk icon).

Hsc Proj Budg Inq

Fiscal Year: 2010 Project: 100035 MILLIMETER ' Pt: Last Activity
 Department: M1800 Ophthalmology End Date: 01/01/2029 03/04/2010
 Fund Code: 48001 CURRENT RESTRICTED

Total Spending Authority		Remaining Spending Authority	
Balance Forward:	2,162.39	Spending Authority:	5,162.39
Budget:	0.00	Expended:	244.42
Income:	3,000.00	Encumbered:	0.00
Spending Authority:	5,162.39	Free Bal:	4,917.97

Customize | Find | View All | First 1-2 of 2 Last

Budg Catg	Balance Forward	Transfers, Adj & Budg	Income	Expended	Encumbered	Balance	Description
1	0.00	0.00	0.00	0.00	0.00	0.00	
2 01	2,162.39	0.00	3,000.00	244.42	0.00	4,917.97	OTHER

Return to Search Previous in List Next in List

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, simply 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:

<u>For this type of requisition...</u>	<u>You should contact...</u>	<u>At this number...</u>
Basic purchase requisition	Purchasing Department	(210) 562-6200
General Stores requisition	General Stores	(210) 567-5982
Travel requisition	Travel Services	(210) 562-6216
Questions and Concerns	DCATS	(210) 567-7777 Option 5

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>