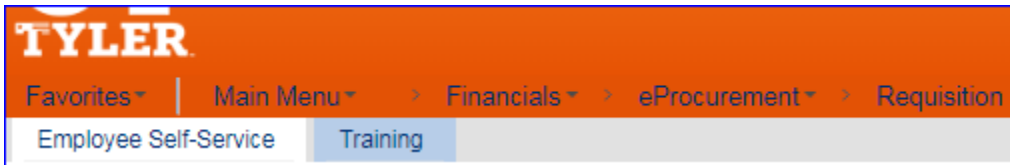


The University of Texas at Tyler Create a Requisition

Navigation

9.2 Navigation



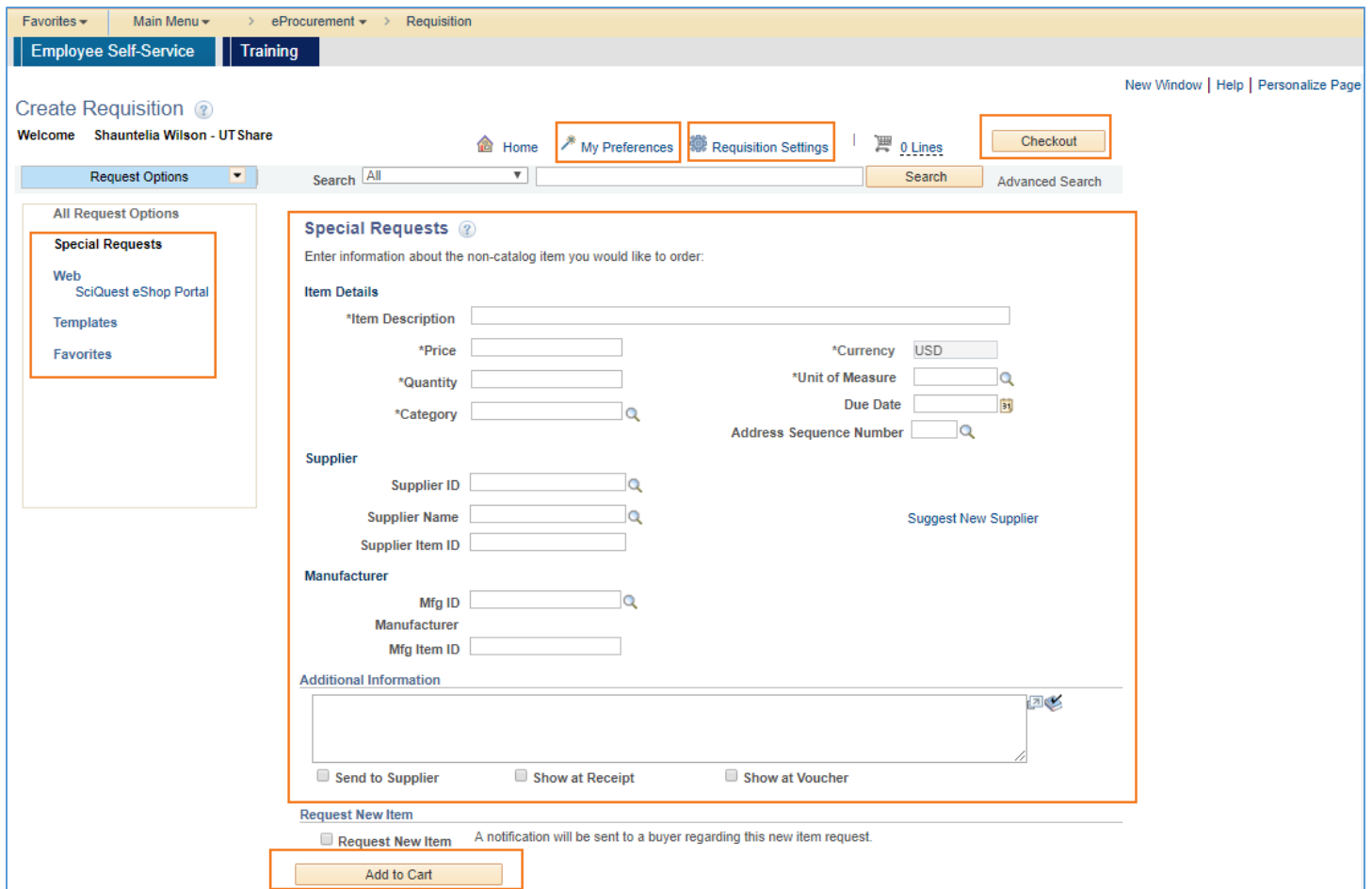
The menu item labeled “Create Requisition in 9.1 is now labeled “Requisition” in 9.2.

Creating Requisition

The create requisition has a completely different look. It will complete the same functions with new added features. The

Create Requisition Home Page

Below is the new look of the Requisition Home Page.



Requisition Settings

The Define requisition tab is now the Requisition Settings link. The default lines pull down is now part of the screen as its own section. You can name your requisition here (as well as at checkout) and that field is now on the upper right side of the screen.

As you see on the screenshot here and throughout PeopleSoft 9.2 Vendor is now referred to as **Supplier**.

The University of Texas at Tyler Create a Requisition

Supplier Location is now under Supplier; it was previously to the right. **Unit of Measure** is now located under the Category field, removing the 3rd column in the line defaults section.

Modify One time Address link has been renamed with Add One Time Address

NOTE: Best practice is to use Requisition Settings for Special requisitions only as most default information in eShop will come from the cart and cannot be altered without causing errors. You can enter SpeedChart information with the Mass Change Feature on the Checkout - Review and Submit Page as well as enter Requisition Name on the Checkout page.

Requisition Settings

Business Unit UT Arlington

*Requester Shauntelia Wilson - UTShare

*Currency

Requisition Name

Priority

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Supplier ?

Supplier Location ?

Buyer ?

Category ?

Unit of Measure ?

Shipping Defaults

Ship To ?

Due Date ?

[Add One Time Address](#)

Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | | First 1 of 1 Last

Chartfields1

Details

Asset Information

...

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center	Function	Program	PC Bus L
1	<input style="width: 50px;" type="text"/>	<input style="width: 50px;" type="text" value="FAAA100"/> ?	<input style="width: 50px;" type="text" value="UTARL"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?	<input style="width: 50px;" type="text"/> ?

The University of Texas at Tyler

Create a Requisition


Request Options

Requisition options houses your eShop Portal link and any templates or favorites you have saved. You must click the down arrow to expand and access these options. This eShop portal works the same as it has in 9.1. You punchout to eShop and shop. You then with either assign or return your cart to PeopleSoft just as you did in 9.1. You will end on the Checkout - Review and Submit page where you can enter your SpeedChart, Ship to, comments and other important information.

My Preferences

My Preferences for Requisition opens as a window to select the fields to display in a search result. You can also choose to auto expand accounting lines when you expand a requisition line (which saves you an extra click) and auto display the shopping cart as you add items.

My Preference

Customize Search Results 

Select the fields to be displayed in Search Results

Item ID:	<input type="checkbox"/>	Supplier:	<input checked="" type="checkbox"/>
Supplier Item ID:	<input checked="" type="checkbox"/>	Supplier ID:	<input checked="" type="checkbox"/>
Mfg Item ID:	<input checked="" type="checkbox"/>	Manufacturer:	<input type="checkbox"/>
Price:	<input checked="" type="checkbox"/>	Manufacturer ID:	<input type="checkbox"/>
UOM:	<input checked="" type="checkbox"/>	Lead Time Days:	<input type="checkbox"/>

*Show Search Result Item Images

Checkout Page Display

Auto expand accounting lines when expanding requisition lines

Shopping Cart Display

Auto display shopping cart when adding items

Delete Saved Searches

Check each saved search to be deleted and then hit OK button to complete removal.

Note There are currently no saved searches.

The University of Texas at Tyler Create a Requisition

Requisition Settings

Use the Requisition settings link to Name the Requisition as well as define requisition defaults, including Supplier, Category, and more. For SpeedChart entry, be sure to check the Override button at the top under Default Options.

NOTE: Best practice is to use Requisition Settings for Special requisitions only as most default information in eShop will come from the cart and cannot be altered without causing errors. You can enter SpeedChart information with the Mass Change Feature on the Checkout - Review and Submit Page as well as enter Requisition Name on the Checkout page.

Requisition Settings

Business Unit

*Requester

*Currency

UT Arlington

Shauntelia Wilson - UTShare

Requisition Name

Priority

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier

Supplier Location

Buyer

Category

Unit of Measure

Shipping Defaults

Ship To

Due Date

Add One Time Address

Attention

Distribution Defaults

SpeedChart

Accounting Defaults Personalize | Find | |

First 1 of 1 Last

Chartfields1 | Details | Asset Information

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center	Function	Program	PC Bus L
1	<input type="text"/>	FAAA100	UTARL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK
Cancel

The University of Texas at Tyler

Create a Requisition

D. Special Requests

Use the Special Request page to create requisitions for items or goods. Your defaults from the Requisition Settings link will be here if you entered them prior to starting your requisition.

The screenshot shows the 'Special Requests' form with several annotations:

- An arrow points to the 'Checkout' button at the top right, with the text: "This is the checkout button that takes you to the Submit page for the requisition."
- An arrow points to the 'Add to Cart' button at the bottom left, with the text: "Press this button to add to shopping cart."
- An arrow points to the 'Request New Item' checkbox, with the text: "Request New Item A notification will be sent to a buyer regarding this new item request."
- An arrow points to the form fields, with the text: "This form is similar to that which you see in 9.1. You fill out this information and then press add to cart and it will be added to your shopping cart. Your defaults from the Requisition settings link will be here if you entered them prior to starting your requisition."
- An arrow points to the 'Shopping Cart' summary window on the right, with the text: "This is the shopping cart. This gives you a lines count and you can click on the link to get a better breakdown."

The 'Shopping Cart' summary window shows:

Description	Qty	UOM
ITEM #1	3	EA

Total Lines: 1
Total Amount (USD): 36.00
Buttons: Close, Checkout

The special request form requires the same information as required in 9.1. Fill out the form with the needed information and press the **Add to Cart** button at the bottom of the screen. This will add the item to your shopping cart. You can then add another item or Checkout if you are finished. As in 9.1, the supplier information is 'frozen' to keep the same supplier on all lines. If you need a different ordering address than the one shown, you should choose it on your first line and it will 'freeze' for the rest of line entries.

The **Shopping Cart** is a link and cart icon at the top middle of the page. You can also see your shopping cart summary to the right of the page if you chose this in My Preferences. Either place gives you an item count.

You will click the **Checkout** button to take you to the submit page for the requisition (previously the Review and Submit tab from 9.1).

The University of Texas at Tyler

Create a Requisition

Submitting Requisition

When you finish adding items, you will click on Checkout; either at the top of the page or in the Shopping Cart to the right. You can save the requisition and submit it for approval immediately or save for later. Apart from editing the requisition, you can add comments and attachments to them as well.

Checkout – Review and Submit

The fields are generally the same for the Checkout – Review and Submit Page as 9.1 Save and Submit tab. There are some additions highlighted below.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: UTARL UT Arlington
Requester: 1000049937 Landa Moss
*Currency: USD
Requisition Name:
Priority: Medium

Cart Summary: Total Amount 36.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ITEM #1		AUTOMATIC SYNC TECHNOLOGIES LLC	3.0000	Each	12.0000	36.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected **Mass Change**

Shipping Summary

Edit for All Lines

Ship To Location: CENT110
Address: 1225 W. Mitchell St.
Room 110
Arlington, TX 76019

Requisition Comments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget Pre-Check Budget

Save & submit Save for Later **Add More Items** Preview Approvals

- **Add More Items** - Click this to reach the Create Requisition screen to add more items. **NOTE: Items should not be added to eShop requisitions.**
- **Requisition Comments** and **Approval Justification** are now separate comment boxes in 9.2.

The University of Texas at Tyler

Create a Requisition

- Mass Change** - Click to access the Edit Lines/Shipping/Accounting details for selected lines, where you can change the shipping location, delivery date, and so on. You can also change the Accounting Lines (speedchart, etc.) for the selected requisition lines.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Supplier Location

Buyer Category

Shipping Information

Ship To Location [Add One Time Address](#)

Due Date Attention

Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | |

First 1 of 1 Last

Chartfields1 | **Details** | **Asset Information**

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Cost Center	Function
1	<input type="text"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/> <input type="button" value="🔍"/>	<input type="text"/>

[Load Values From Defaults](#)

Once you have reviewed your requisition there is a new option to Save for Later. You can also Check Budget, Save and Submit into workflow, and/or Preview Approvals as in 9.1.