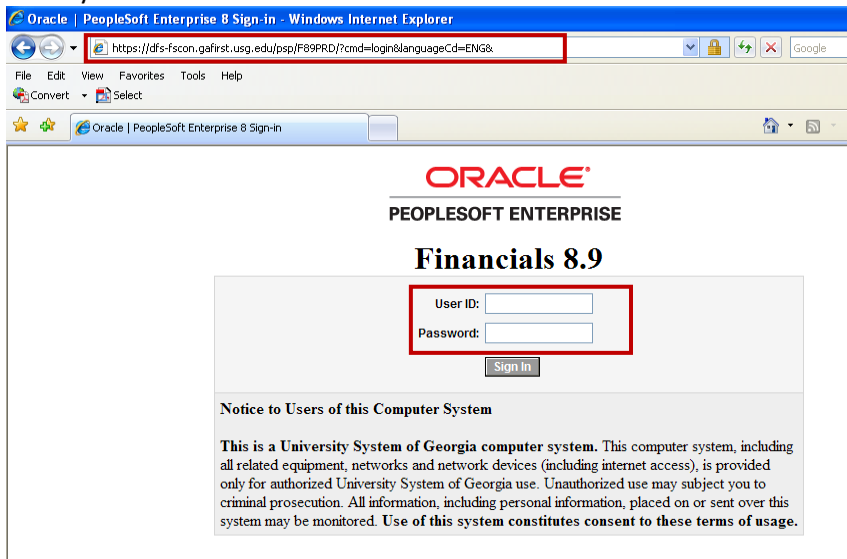
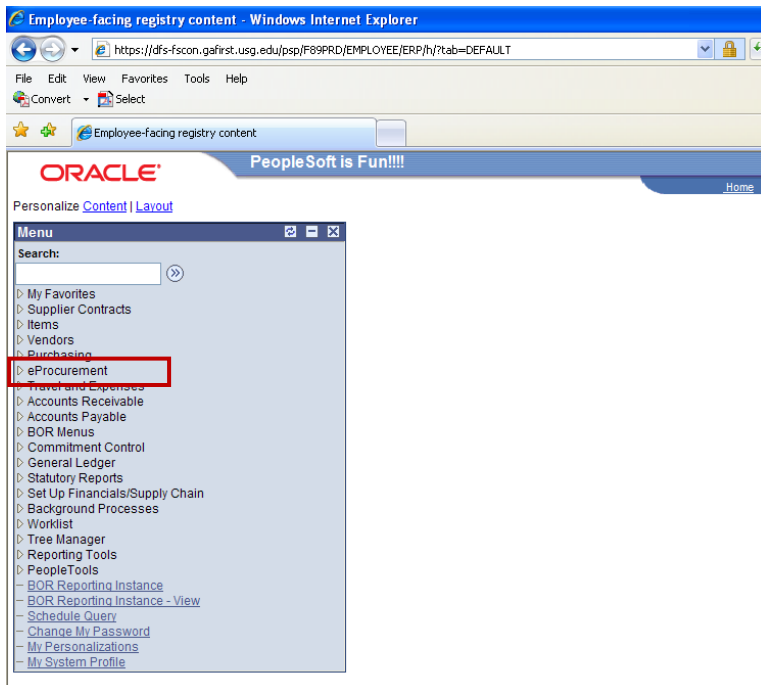


Creating a Requisition

1. Link for PeopleSoft core: <https://dfs-fscon.gafirst.usg.edu/psp/F89PRD/?cmd=login&languageCd=ENG&>
2. Enter your User ID and Password.

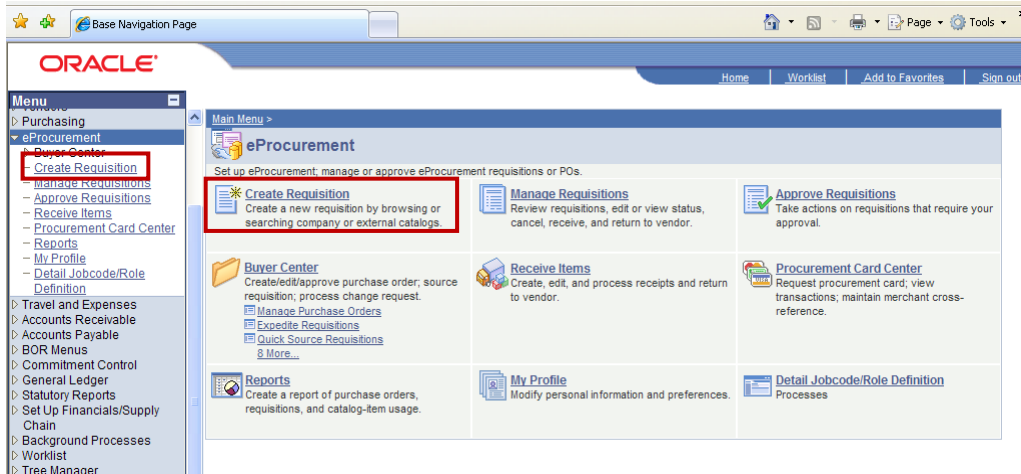


3. Click the eProcurement link.

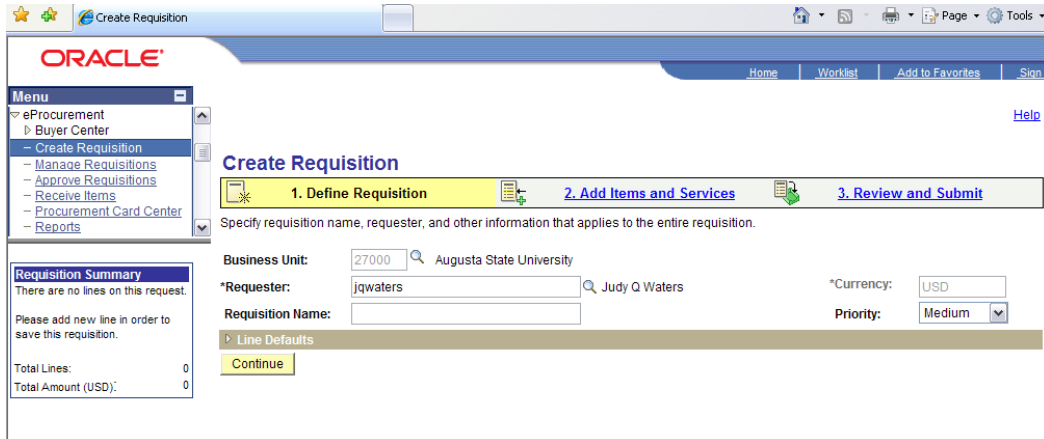


Creating a Requisition

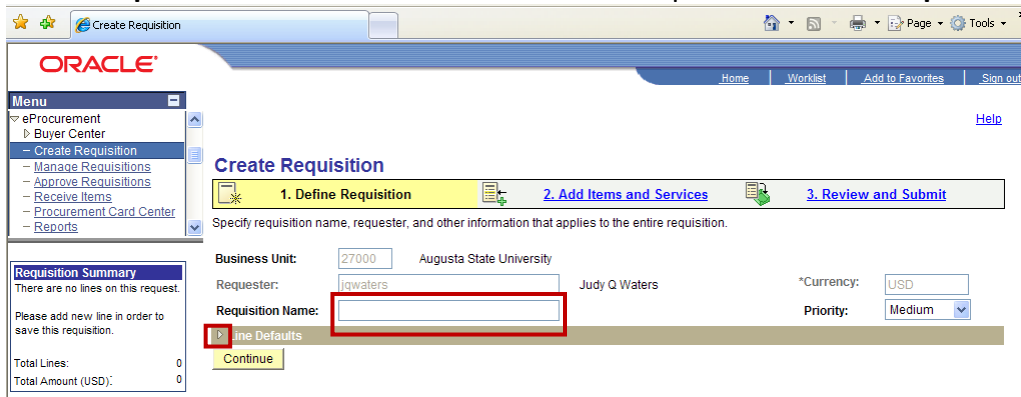
- Click the **Create Requisition** button. You may select from the Menu Bar from the left or the first item listed on the screen.



- Your screen should look like this:



- In the **Requisitions Name** field: Enter a short description such as "**Computer for Room 101**".



Creating a Requisition

7. Click the **Expand section** button (small arrow before **Line Defaults**).

The screenshot shows the Oracle 'Create Requisition' interface. The 'Line Defaults' section is expanded and highlighted with a red box. It contains the following fields and values:

- Vendor: 0000000002
- Vendor Location: MAIN
- Buyer: meubanks
- Category: 20453
- Unit of Measure: [empty]

Below the Line Defaults are Shipping Defaults and Accounting Defaults.

Shipping Defaults:

- Ship To: RECEIVM
- Due Date: [empty]
- Attention: [empty]

Accounting Defaults:

Location	GL Unit	Account	Fund	Dept	Program	Class	Project	Bud Ref	Budget Date
PR OC	27000	714134	10500	1063200	16300	11000	2010		03/18/2010

A 'Continue' button is located at the bottom of the form.

Note: Information entered on the Line Defaults page will be the default for all lines added to the requisition; however, data can be changed on individual lines as needed.

8. Enter the vendor number (Must be 10-digits). If you do not know the vendor number, click the **Vendor Lookup** button.
- Search for Vendor under **Short Vendor Name** field.
 - Click the **Find** button.
 - Click the **Vendor ID** link.
 - When selected it will be passed back to the requisition defaults.
9. Click the **Look up Buyer (Alt+5)** button.
- Select the appropriate Buyer from the **Search Results** table.
Amber Armour – All IT related purchases (excluding copiers)
Lynn Carmack – All general purchases (excluding IT related purchases, copiers, furniture, and travel)
Judy Waters – All furniture orders, lease or purchased copiers, and preventative maintenance
Tamisha Sullivan – All athletic per diem and travel orders
Tamisha Sullivan – All per Diem orders (excluding Athletics Department)
Generic Travel – All travel orders (excluding Athletic Department)
Year End Buyer – Only use this buyer if instructed by VP of Business Services with year-end funds
 - Click the **Look up Category (Alt+5)** button.
 - Enter part of the description in the **Description** field.
 - Click the **Look Up** button.
 - Select the appropriate Category for the requested item from the **Search Results** table.
10. Click the **Look up Unit of Measure (Alt+5)** button, select the correct one.
11. Do **NOT** enter a **Due Date**.

Creating a Requisition

12. All chartfields can be entered here on the Accounting Defaults Chartfields1 tab. Based on the requester's setup, some chartfields will automatically default.
 - a. Required chartfields will be Account, Fund, Dept, Program, Class, Project (or Grant), and Budget Reference (budget year).
 - b. If the requisition consists of multiple lines for different account numbers, it is best to leave the account number blank and manually enter each account number on each line on Step 3 – Review & Submit.

Accounting Defaults

Location	GL Unit	Account	Fund	Dept	Program	Class	Project	Bud Ref	Budget Date
PR OC	27000	714134	10500	1063200	16300	11000		2010	03/18/2010

13. If this is not an equipment purchase over \$3,000, please skip to step # 15. If the is an equipment purchase, please continue to step #14.

14. Click on the **Asset Information** Tab.
 - a. Enter the AM Business Unit (27000).

Asset Information

AM Business Unit	Profile ID	Capitalize	Cost Type	Description
		<input type="checkbox"/>		

Creating a Requisition

b. Click on the Look Up icon to select the appropriate Profile ID.

The screenshot shows the Oracle 'Create Requisition' interface. On the left is a navigation menu with options like 'Buyer Center', 'Create Requisition', 'Manage Requisitions', 'Approve Requisitions', 'Receive Items', 'Procurement Card Center', 'Reports', 'My Profile', and 'Detail Jobcode/Role'. The main area displays a list of asset profiles with columns for Profile ID, Description, and a checkmark. The 'SVP' profile (Small Value Property) is highlighted with a red box. A 'Requisition Summary' box on the left shows 'Total Lines: 1' and 'Total Amount (USD): 3,001.00'.

Profile ID	Description	Checkmark	
27000	LEBL026	Leased Building 20 Year	Y
27000	LEBL030	Leased Building 30 Year	Y
27000	LEBL035	Leased Building 35 Year	Y
27000	LEBL040	Leased Building 40 Year	Y
27000	LEBL045	Leased Building 45 Year	Y
27000	LEBL050	Leased Building 50 Year	Y
27000	LEBL055	Leased Building 55 Year	Y
27000	LEBL060	Leased Building 60 Year	Y
27000	LECOMP	Leased Computers	Y
27000	LEASEDLAND	Leased Land	Y
27000	LEASEIMP	Leasehold Improvements	Y
27000	LEACIMP10	Leased Fac & Oth Improv-10 Yr	Y
27000	LEACIMP15	Leased Fac & Oth Improv-15 Yr	Y
27000	LEACIMP20	Leased Fac & Oth Improv-20 Yr	Y
27000	LEACIMP25	Leased Fac & Oth Improv-25 Yr	Y
27000	LEACIMP30	Leased Fac & Oth Improv-30 Yr	Y
27000	LEACIMP4	Leased Fac & Oth Improv-4 Yr	Y
27000	LIR_COL	Library Collections	Y
27000	LINFR15	Leased Infrastructure-15Yr	Y
27000	LINFR20	Leased Infrastructure-20Yr	Y
27000	LINFR25	Leased Infrastructure-25Yr	Y
27000	LWACH	Leased Machinery & Equipment	Y
27000	LVEHICLE	Leased Vehicle	Y
27000	MAINTFARM	Maintenance & Farm Equip	Y
27000	OFFFUR10YR	Office Furniture 10 Year	Y
27000	OFFFUR15YR	Office Furniture 15 Year	Y
27000	OFFFUR20YR	Office Furniture 20 Year	Y
27000	OFFMCH10YR	Office Mach. & Equip 10 Year	Y
27000	OFFMCH15YR	Office Mach. & Equip 15 Year	Y
27000	OTHEQ5YR	Other Equipment 5 Year	Y
27000	OTHEQ10YR	Other Equipment 10 Year	Y
27000	OTHEQ15YR	Other Equipment 15 Year	Y
27000	OTHEQ20YR	Other Equipment 20 Year	Y
27000	SVP	Small Value Property	Y
27000	TITLERETSP	Title Retained by Sponsor	Y
27000	VEHIC04YR	Vehicle 4 Year	Y
27000	VEHIC10YR	Vehicle 10 Year	Y
27000	WDART	Works of Art Non-Depreciable	Y
27000	WDARTD	Works of Art Depreciable	Y

c. Select the appropriate Profile Id for the equipment which will be purchase. You must determine the life of the equipment according to the category. Select the appropriate Asset Profile ID and Description. If the equipment is between the dollar amount of \$3,000 and \$5,000 then it would be considered Small Value Property (SVP).

d. Click the Button **Continue**

The screenshot shows the Oracle 'Create Requisition' interface at the 'Define Requisition' step. The 'Business Unit' is 'Augusta State University' and the 'Requester' is 'Judy Q Waters'. The 'Requisition Name' field is empty. The 'Line Defaults' section is expanded, showing a table with 'AM Business Unit' and 'SVP' selected. A red box highlights the 'Continue' button at the bottom left.

Business Unit: 27000 Augusta State University

Requester: jq waters Judy Q Waters *Currency: USD

Requisition Name: Priority: Medium

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: **Vendor Location:**

Buyer: **Category:** **Unit of Measure:**

Shipping Defaults

Ship To: RECEIVN [Modify Shipping Address](#)

Due Date: **Attention:**

Accounting Defaults

AM Business Unit	Profile ID	Capitalize	Cost Type	Description
27000	SVP	<input type="checkbox"/>	<input type="text"/>	

Continue

Creating a Requisition

15. Click the **2. Add Items and Services** link.

16. Click the **Special Request** link. Then click the **Special Item** link.

The screenshot shows the Oracle 'Create Requisition' interface. The '2. Add Items and Services' step is highlighted in yellow. Below it, the 'Special Request' tab is selected, and the 'Special Item' option is highlighted in red. The 'Special Item' section lists three options: 'Special Item' (Request an item that is not listed in the Catalog), 'Fixed Cost Service' (Request a one-time service for a flat fee), and 'Variable Cost Service' (Request a service for which the fee is based on the time worked). The 'Special Item' option is selected.

Your screen will then look like this:

The screenshot shows the Oracle 'Create Requisition' interface with the 'Special Item' form filled out. The 'Special Item' section is highlighted in blue. The form fields are: '*Item Description': 'i7w3.0GHZ, 4GB Ram, 160GB HD, 17" Monitor, & 3 Year warranty Quote #531283209'; '*Price': '1005.00'; '*Quantity': '1'; '*Currency': 'USD'; '*Category': '20453'; '*Unit of Measure': 'ea'; '*Vendor ID': '000000002'; '*Vendor Name': 'Dell Computer Corporation'; '*Vendor Item ID': ''; '*Mfg ID': ''; '*Mfg Item ID': ''; '*Additional Information': (empty text area); '*Send to Vendor': (checkbox); '*Show at Receipt': (checkbox); '*Show at Voucher': (checkbox). The 'Add Item' button is highlighted in yellow.

17. Enter the desired information into the **Item Description** field. Enter as clear and accurate description as possible (first 25 letters will be the description on your inventory reports).

18. Enter the cost in the **Price** field and Enter desired amount in the **Quantity** field.

19. Enter any comments you wish to be seen on the requisition. Note: You may add multiple comments by clicking the + sign to the right of the comment box.

- Click the **Send to Vendor** checkbox if you want the Comments inserted under Additional Information to appear on the purchase order
- Click the **Show at Receipt** checkbox for the comments under Additional Information to show at the time the item(s) are received
- Click the **Show at Voucher** checkbox if the comments entered under Additional Information need to be seen at the time of vouchering.

Creating a Requisition

20. Note that no lines currently exist on the requisition. The line information is not saved until the Add Item button is selected.

21. Click the **Add Item** button.

The screenshot shows the Oracle 'Create Requisition' web interface. The 'Special Item' section is active, displaying the following fields:

- *Item Description: w3.0GHz, 4GB Ram, 160GB HD, 17" Monitor, & 3 Year warranty Quote #531283209
- *Price: 1005.00
- *Quantity: 1
- *Category: 20453
- Vendor ID: 0000000002 (Dell Computer Corporation)
- *Currency: USD
- *Unit of Measure: ea
- Due Date: [empty]

At the bottom of the 'Special Item' section, the 'Add Item' button is highlighted with a red box. Other buttons include 'Cancel' and 'Add or Start New Type'.

22. Once the Add item button is selected, the Requisition Summary section is updated with the number of lines and amount.

The screenshot shows the Oracle 'Create Requisition' web interface after the 'Add Item' button was clicked. The 'Requisition Summary' section is updated and highlighted with a red box, showing the following information:

Description	Qty	UOM
Desktop Computer	1	EA
Dell Opti...		

Total Lines: 1
Total Amount (USD): 1,005.00

The 'Special Item' section remains visible, showing the same item details as in the previous screenshot. The 'Add Item' button is still highlighted with a red box.

Note: If an additional line should be added, simply complete the information and click the 'Add Item' button. (Repeat Steps 17 – 22)

Creating a Requisition

23. Click the **Review and Submit** link when you have completed adding all desired lines.

The screenshot shows the Oracle 'Create Requisition' interface. At the top, there are three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. The '3. Review and Submit' tab is highlighted with a red box. Below the tabs, there are fields for 'Business Unit' (27000 Augusta State University), 'Requester' (Judy Q Waters), 'Requisition Name' (Com puter for Room 101), and 'Priority' (Medium). A table titled 'Requisition Lines' contains one line: 'Desktop Computer Dell OptIP' with a quantity of 1.0000, a price of 1,005.00, and a total of 1,005.00. Below the table, there are buttons for 'Add to favorites' and 'Modify Line / Shipping / Accounting', with the latter highlighted in a red box. At the bottom, there are buttons for 'Save & submit', 'Save & preview approvals', and 'Cancel requisition', along with a 'Find more items' link.

24. Select the requisition line by clicking the box to the left of the line.

Optional Step: Click the **Add to favorites** button if you want to place the selected lines in your list of commonly ordered items. The pop-up window confirms you have successfully added the item or informs you that the item already exists in your list of favorites. Click the **Close** button.

25. Click on the **Modify Line/Shipping/Accounting** box

26. Click "Load Values from Default" (blue link at bottom right)

The screenshot shows the 'Modify Line / Shipping / Accounting' dialog box. It contains several sections: 'Line Information' with fields for 'Vendor ID', 'Vendor Location', 'Buyer', and 'Category'; 'Shipping Information' with fields for 'Ship To', 'Due Date', and 'Attention'; and 'Accounting Information' with a table for 'Chartfields1' and 'Asset Information'. The 'Load Values From Defaults' link is highlighted in a red box at the bottom right of the dialog box. There are also 'Apply' and 'Cancel' buttons at the bottom.

Creating a Requisition

27. Click **Apply** once you have checked your chartfield account number.

Modify Line / Shipping / Accounting

Line Information

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

Vendor ID: 0000000002 Vendor Location: MAIN
 Buyer: meubanks Category: 20453

Shipping Information

Ship To: RECEIVING [Modify Shipping Address](#)
 Due Date: Attention:

Accounting Information

Chartfields1	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Bud Ref	Budget Date
1		27000	714134	10500	1063200	16300	11000		2010	03/18/2010

[Load Values From Defaults](#)

Apply **Cancel**

28. Click the **OK** button to apply all default information to all lines that were selected in Step 24.

Distribution Change Options

For the selected requisition lines, apply distribution changes to:

- All Distribution Lines**
Apply changes to all existing distribution lines.
- Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK **Cancel**

29. Click the **OK** button to apply all default information to all lines that were selected in Step 24.

30. Click the **Expand Section** button to view the line and distribution information for the line.
 Note: This section is where you can change the account number in the appropriate field if the account numbers are different on multiple lines and you do not include the default section in Step # 12b.

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Computer Desktop - Quote #	Dell Computer Corporation	1.0000	Each	1.000	1.00
2	Computer Monitor - Quote #	Dell Computer Corporation	1.0000	Each	1.000	1.00

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account
1	Open		PROC	1.0000	100.0000	1.00	27000	714100

Total Amount: 2.00 USD

Creating a Requisition

31. Click the **Save & preview approvals** button when you are done updating the requisition and want to preview the approval routing.

The screenshot shows the Oracle 'Create Requisition' interface. The page is divided into several sections:

- Menu:** Includes options like 'Buyer Center', 'Create Requisition', 'Manage Requisitions', 'Approve Requisitions', 'Receive Items', and 'Procurement Card Center'.
- Requisition Summary:** Shows 'Desktop Computer' with a quantity of 1 and a total amount of 1,005.00 USD.
- Business Unit:** Augusta State University.
- Requester:** Judy Q Waters.
- Requisition Name:** Computer for Room 101.
- Requisition Lines Table:**

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Desktop Computer Dell OptiP	Dell Computer Corporation	1.0000	Each	1,005.000	1,005.00
- Buttons:** At the bottom, there are buttons for 'Save & submit', 'Save & preview approvals' (highlighted with a red box), and 'Cancel requisition'.

32. The confirmation page allows you to review who is in the approval path for this requisition based on the chartfields. This field will be updated with the appropriate approver's user id.

The screenshot shows the Oracle confirmation page for the requisition. It displays approval paths for two lines:

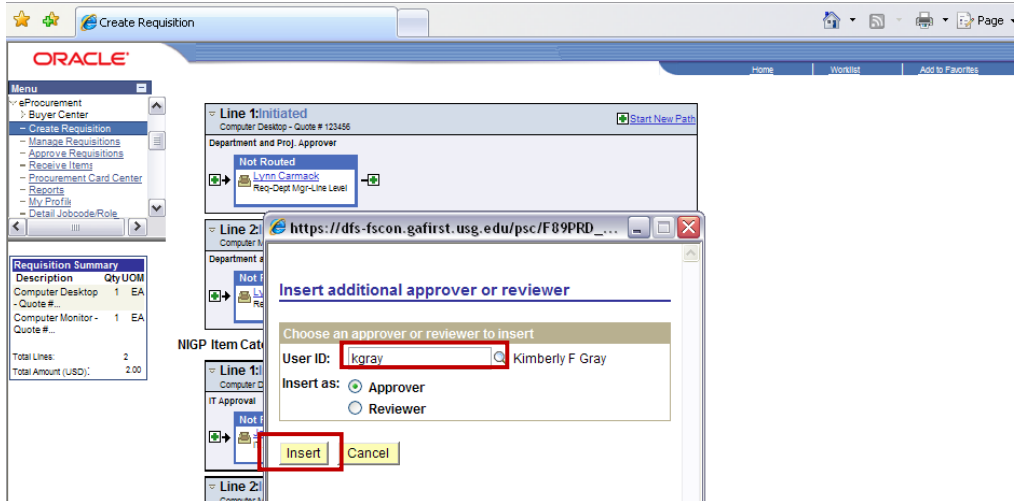
- Line 1: Initiated** (Computer Desktop - Quote # 123456):
 - Department and Proj. Approver: Not Routed. Approver: Lynn Carmack (Req-Dept Mgr-Line Level).
- Line 2: Initiated** (Computer Monitor - Quote # 123456):
 - Department and Proj. Approver: Not Routed. Approver: Lynn Carmack (Req-Dept Mgr-Line Level).
- NIGP Item Category Approval:**
 - Line 1: IT Approval. Approver: Justice A Deloach (IT Approval).
 - Line 2: IT Approval. Approver: Justice A Deloach (IT Approval).

Buttons at the bottom include 'Submit', 'Edit Requisition', and 'Apply Approval Changes'.

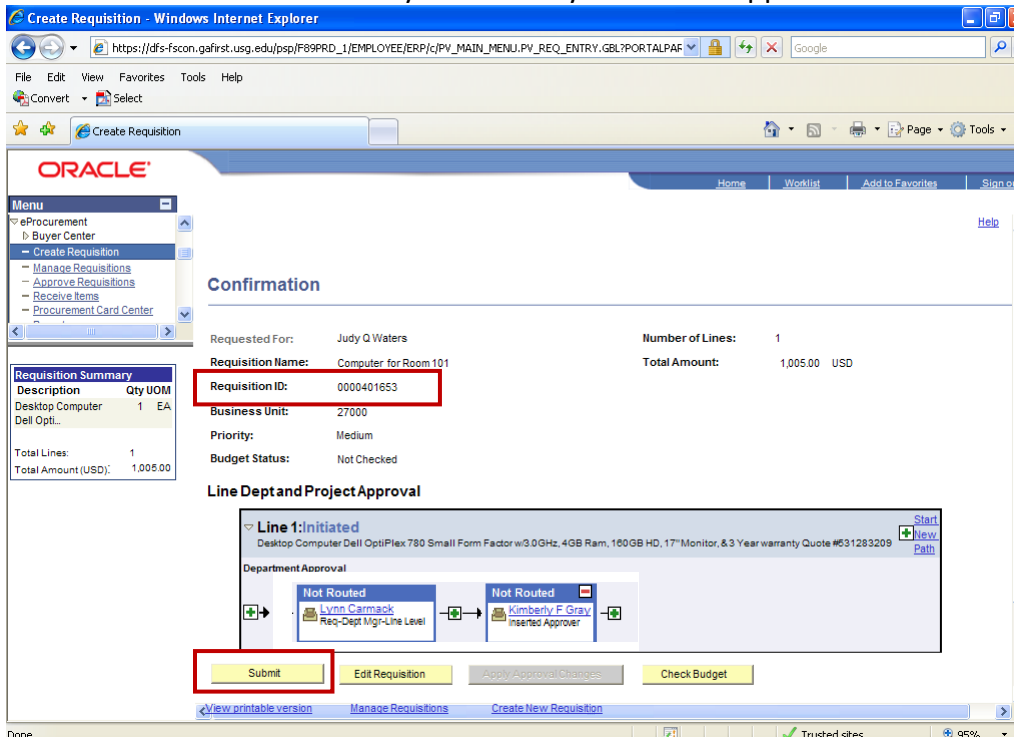
33. If this item should be approved or reviewed by another party (Kim Gray for Grants, etc.), you may at this time add an Ad hoc approver or reviewer by clicking on the + sign on each line.
 Note: The system will automatically add the IT department as an approver, so please do not add IT again.

Creating a Requisition

34. Once you click Insert, the reviewer or approver will be added.



35. Click the **Submit** button when you are ready to send an approval notification to the approvers.



36. Lastly, please write the requisition number on all supporting documentation and forward to the Purchasing Office. You may fax this documentation to ext. 1761 or email at jqwaters@aug.edu. Without supporting documentation, the Purchasing Office will not be able to process the requisition.