PeopleSoft Financials - Requisitions

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Recommendations

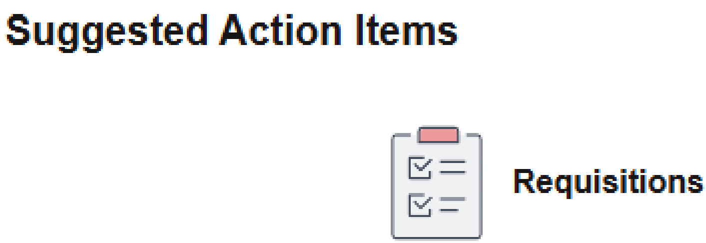
Before starting any requisitions there are several key pieces of information you should check:

1) Are the items you plan to order on the bid list?
   a) Bid list items can be verified on the Purchasing Intranet Site.
2) Is the supplier/vendor you plan to use active and open for ordering?
   a) Supplier status can be reviewed in PeopleSoft.
3) Is the account string you plan to use active?
   a) Run the Budget Status Report on the planned account string.
4) Confirm the origin number for your request to ensure the transaction enters the correct approval workflow.
   a) Origin number can be confirmed here: FCPS Origins.

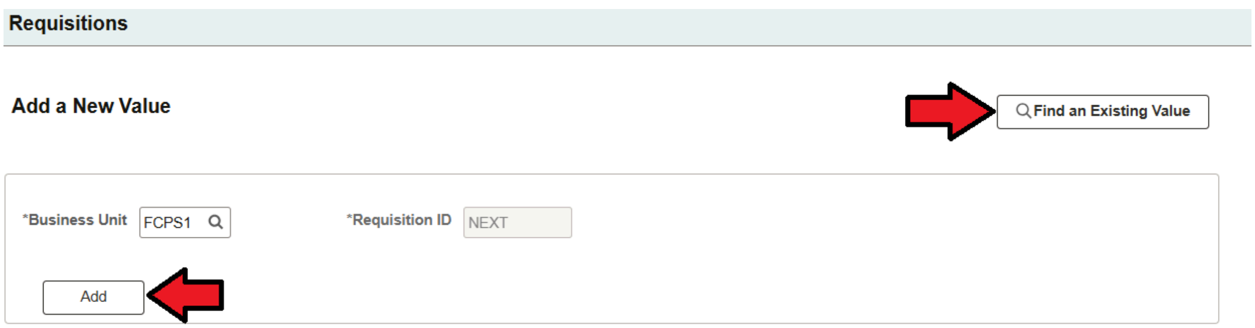
↓

Creating A Generic/Normal Requisition - ([Video]())

First [Log Into PeopleSoft Financials]() then from the FCPS Menu homepage under Suggested Actions Items **click Requisitions**.



From the Requisitions menu **click Add** to start a new requisition or **click Find an Existing Value** to search for an existing requisition. *Note: The Business Unit should always be FCPS1.*



From the Add/Update Requisitions screen **enter the Requisition Name using all capital letters**. *Note: The requisition name is for your records only. Examples: Who/What is it for, bill to SAF, school or department name, etc.*

Under the Header block remember to **use your Default Origin** unless you have multiple Origin Numbers or if you are a Media Specialist. When ready to begin entering account string information **click on Requisition Defaults.**

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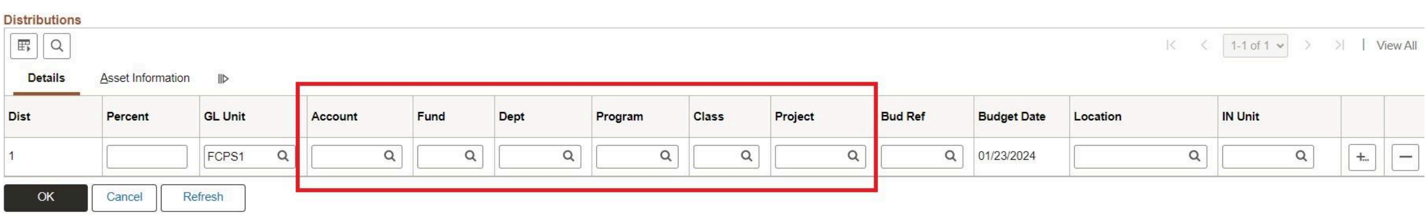
From the Requisition Defaults screen **enter the information** below. **Click OK** when finished.

Supplier – Select one using the magnifying glass and search look up *(This is a required field)*
Category – Type GENERIC. *Exceptions: Open Purchase Orders or Check Enclosed*
Unit of Measure – Select if you will be using the same one for multiple line items.
Supplier Location – Typical left on the default option but can be changed if needed. Check the bid list for confirmation.
Ultimate Use Code Most school orders will use 20 (Code 2 only needs to be used if the computer/laptop/tablet is not on the bid list)

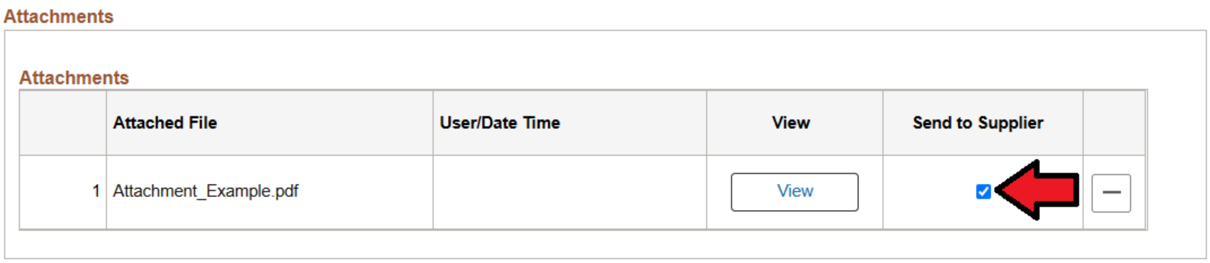
Account/Fund/Dept/Program/Class/Project will be added based on Account String provided by the budget department list



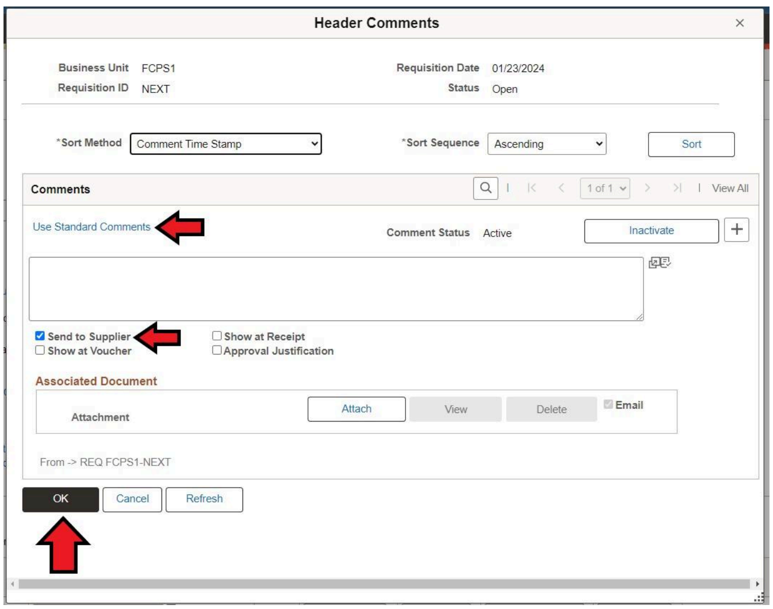
Return to the Header block and **click Add Comments.**

In the Header Comment popup **enter your comments**. There are three types of Header Comments:
External or PO Comments (Default setting) - **Check the Send to Supplier box** which will display these comments on the purchase order.
Internal Comments - **Uncheck the Send to Supplier box** which will not display these comments on the purchase order.
Standard Comments - **Click this link** as needed. Note: This is necessary for Open Purchase Orders – See directions for Creating an Open PO Requisitions.

If needed, under Associated Document **click Attach and follow the file upload wizard** to upload PDFs. If you need to attach more than one document **click Add Attachments again** then follow the file upload wizard. *Note: Make sure to **click the Send to Supplier** box on each attachment row that needs to be shared with the vendor.*

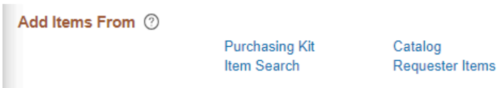


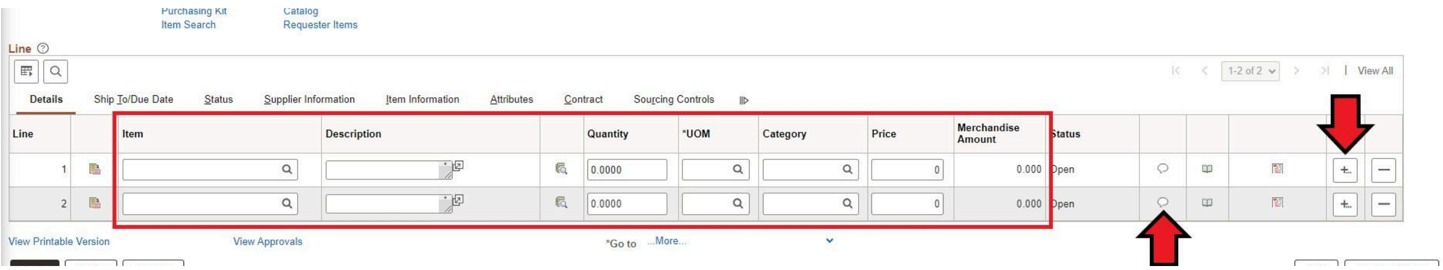
When finished **click OK**.



Returning to the Add/Update Requisitions screen, **enter Line Items to be ordered**. To add more lines **click the plus button icon** at the end of the row.

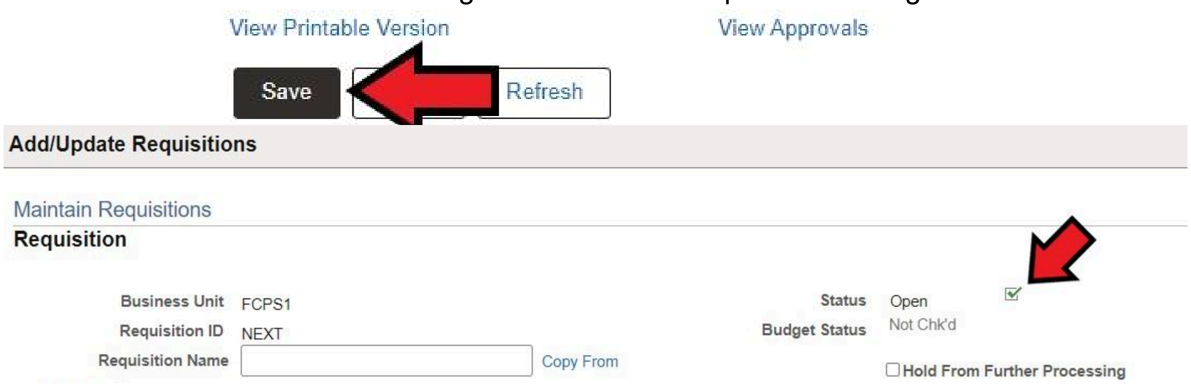
Note: If you are ordering less than 25 items, each item must be entered line by line as seen below. If you have a list of 25 items or more to attach, see directions for [Creating An Attached List Requisition](#)



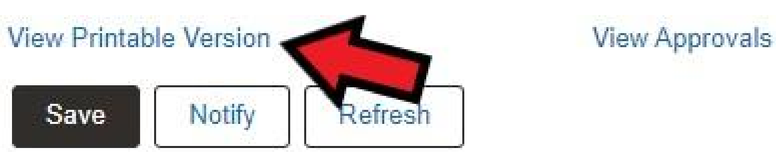


If needed, **click on the Comment Icon** to add a Line Comment. *Note: If you check the box next to Send to Supplier (this is the default) – The comments will be printed on the purchase order. If you uncheck the box next to Send to Supplier – The comments are provided for internal review only and will not be printed on the purchase order.* **Click OK** to close the comment box.

When finished adding Line Items **click Save.**
Click View Approvals to see the approval path your requisition will go through. If incorrect, confirm the Origin or Category in your Header Box. If correct, go back to the Header Box and **click the Green Check Mark** to change the status from Open to Pending.



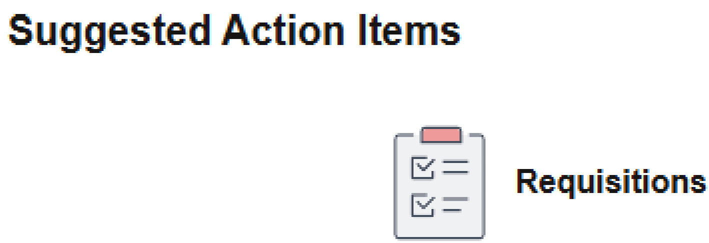
Click View Printable Version to see a PDF version of your requisition. This PDF can be saved or printed.



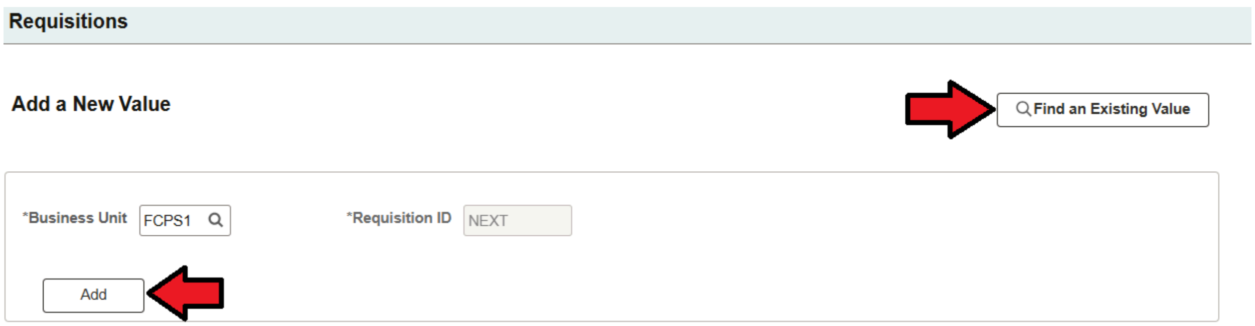
Note:Once a Requisition becomes a PO, you will no longer have the ability to view, print, and/or save it in the same form as when you are creating it. Additionally, you will not be able to print Requisitions created by others. To check the status of your requisition please see our documentation on the [Purchasing Dashboard>Document Status](#).

Find An Existing Requisition

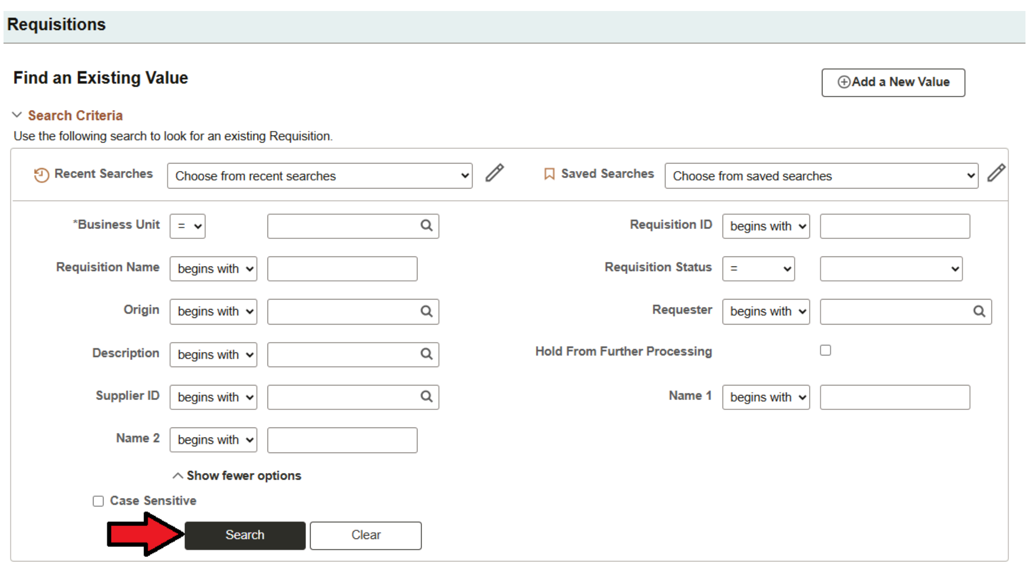
First [Log Into PeopleSoft Financials]() then from the FCPS Menu homepage under Suggested Actions Items **click Requisitions**.



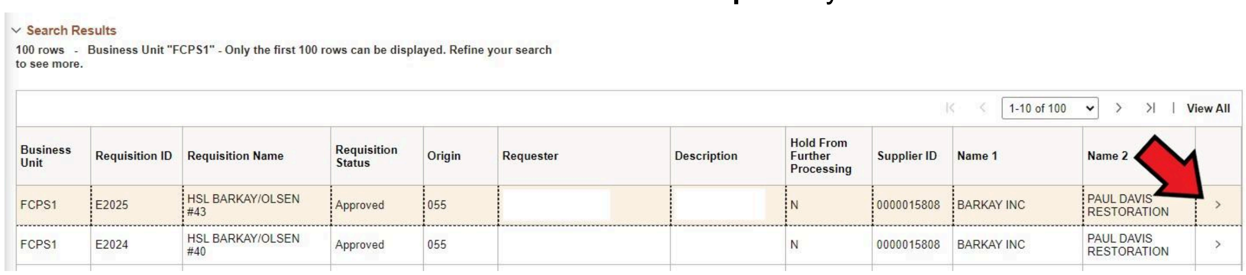
From the Requisitions menu **click Add** to start a new requisition or **click Find an Existing Value** to search for an existing requisition. *Note: The Business Unit should always be FCPS1.*



On the following screen **use the search features to enter the desired information** and **click Search**.



From the search results area **click on the line of the expense** you wish to review.


Search Results
100 rows - Business Unit "FCPS1" - Only the first 100 rows can be displayed. Refine your search to see more.

1-10 of 100 | View All

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Description	Hold From Further Processing	Supplier ID	Name 1	Name 2	
FCPS1	E2025	HSL BARKAY/OLSEN #43	Approved	055			N	0000015808	BARKAY INC	PAUL DAVIS RESTORATION	>
FCPS1	E2024	HSL BARKAY/OLSEN #40	Approved	055			N	0000015808	BARKAY INC	PAUL DAVIS RESTORATION	>

Canceling A Requisition

Old Documentation Listed on Page 42 Under J Step 3 - 02 Requisitions.pdf
Following the instructions [Finding An Existing Requisition](). When the desired requisition is displayed **click the Red X at the top of the screen** any time prior to it being approved.

Checking The Status Of A Requisition

Old Documentation Listed on Page 45 Under J Step 4C - 02 Requisitions.pdf
Following the instructions [Finding An Existing Requisition](). From the search results area the **Requisition Status column** will display the desired information.

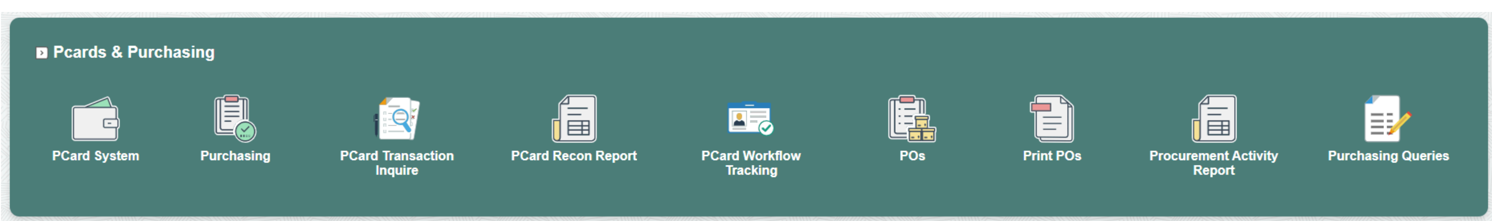

Search Results
100 rows - Business Unit "FCPS1" - Only the first 100 rows can be displayed. Refine your search to see more.

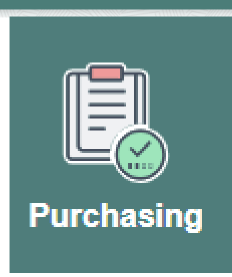
1-100 of 100 View 10

Business Unit	Requisition ID	Requisition Name↑	Requisition Status↓	Origin	Requester	Description	Hold From Further Processing	Supplier ID	Name 1	Name 2	
FCPS1	E2008		Approved	23			N	0000007308	ELECTRIC MOTOR REPAIR CO	EMR	>
FCPS1	E1995		Approved	39			N	0000008853	PARLIGHTS CONCERT LIGHTING INC	PARLIGHTS INC	>

Viewing A Requisition Opened By Another Requester

First [Log Into PeopleSoft Financials]() then from the FCPS Menu homepage scroll down to the Pcards & Purchasing section and **click Purchasing**.





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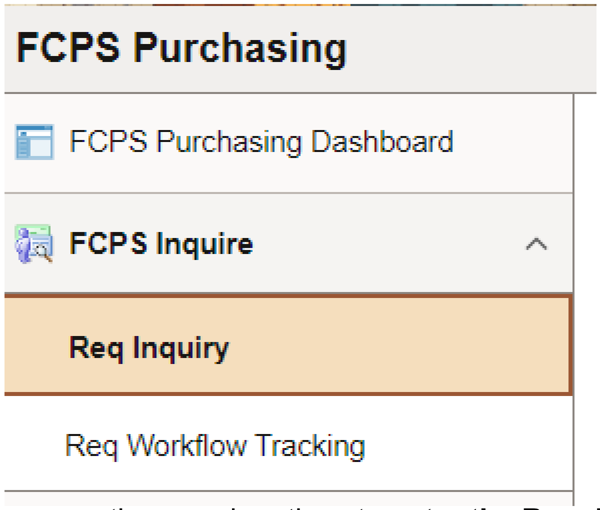
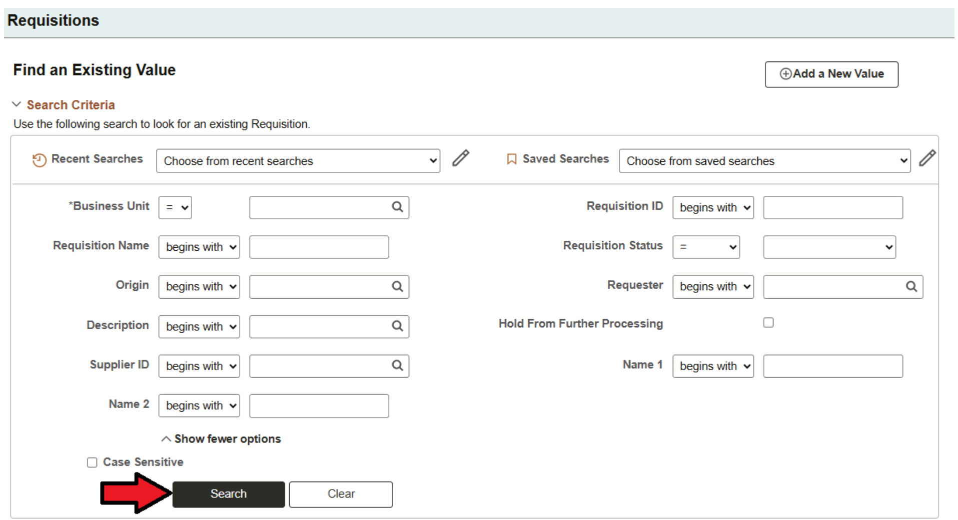
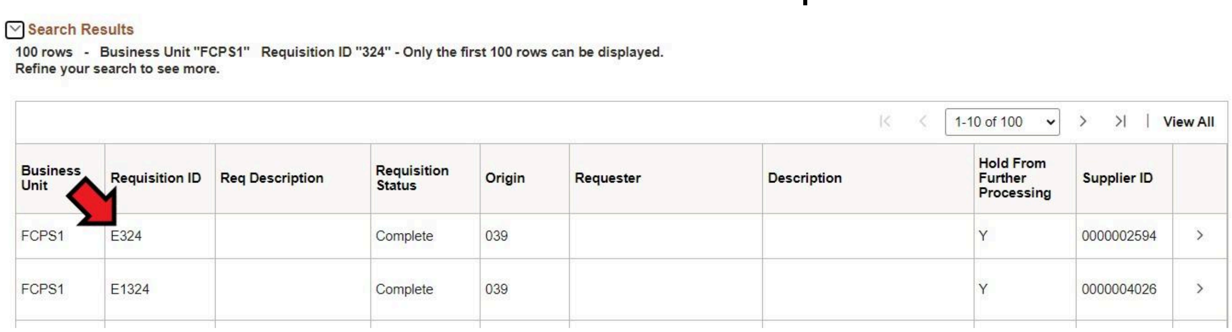
From the Purchasing Dashboard **click the Requisitions** tile then using the navigation collection on the left hand side of the screen expand the **FCPS Inquire** menu option then **click Req Inquiry**.



From the Req Inquiry screen use the search options to **enter the Requisition ID number or other fields** then **click Search**.



From the search results **click the desired line to view the requisition.**



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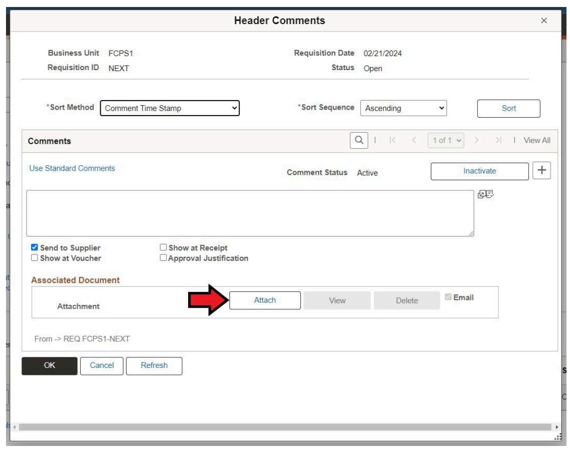
Additional Types Of Requisitions

Attached List Requisition

In some cases you may need to attach a list or document to your requisition such as if you have a list of 25 items or more.

Following the instructions **[Creating A Generic/Normal Requisition]** until you get to the section for Header Comments and attachments. From the Header Comments popup screen **click Attach then follow the wizard to attach the appropriate list or document.** When finished you may complete the requisition by using the generic/normal steps.

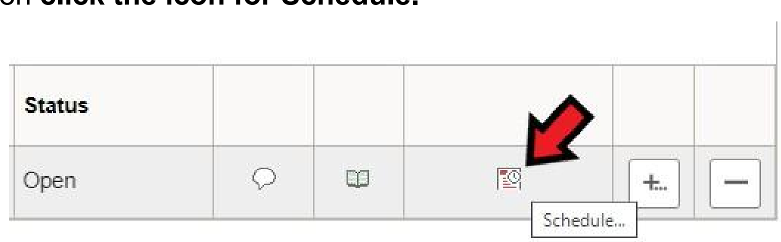


Capital Asset Item Requisition

A Capital Asset Item is one with a value of $5,000 or more. Review the Capital Asset Profile seen below to determine if this process is needed.

CA2310 - School Buses CA2350 - Other Vehicles CA3200 - Woodworking Machinery CA3400 - Metalworking Machinery CA3500 - Service and Trade Equipment CA3700 - Mowers/Tractors/Snow/Garden Equip CA3800 - Misc. Construction Equipment CA3900 - Material Handling Equipment CA4100- Refrigeration/AC Equipment CA4900 - Vehicle Repair Equipment CA5200- Measuring & Inspection Tools	CA5800 - Communication/Security/Sound Equip CA6500 - Medical Equipment CA6600 - Lab/Measuring Equip CA6700 - Cameras/Projectors CA6900-Training/Speaking Aids CA7000 - Computers/Printers/Peripherals CA7300 - Kitchen/Food Service Equip CA7700 - Musical Instruments CA7800 -Athletic/Sporting Equip CA7900 - Ind Cleaning Equip

Following the instructions **[Creating A Generic/Normal Requisition]** until you get to the section for entering Line Item details. If the item is considered a Capital Asset scroll to the right of the line item detail then **click the icon for Schedule.**



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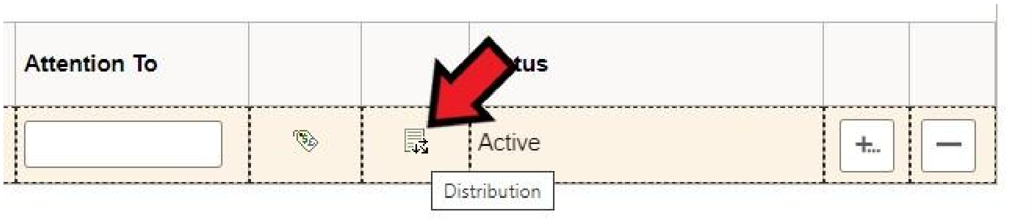
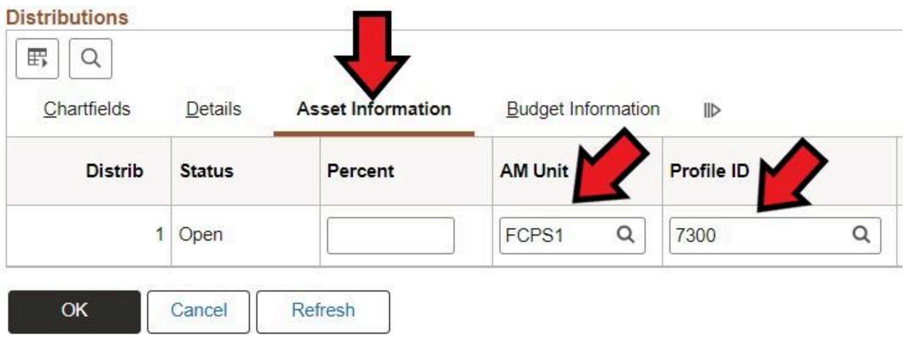
From the Maintain Requisitions screen **click the icon for Distribution**.



On the Distribution Details screen **click Asset Information** then **confirm or adjust the AM Unit** and **Profile ID** fields as needed. **Click OK** then **Save** to return to the Main Page. From this point you may complete the requisition by using the generic/normal steps.



Check Enclosed Requisition

In some cases you may have a presenter and they bring the Invoice the day of the presentation. For those situations you can submit a requisition with a Check Enclosed.

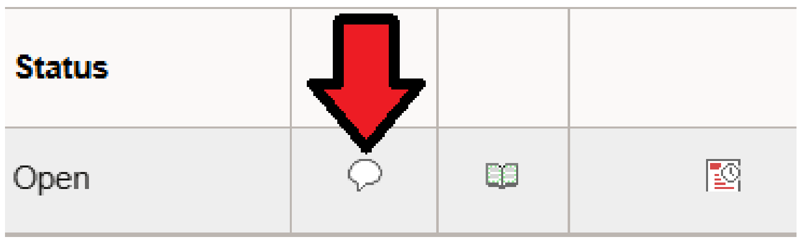
Following the instructions **Creating A Generic/Normal Requisition** until you get to the section for entering Requisition Defaults. For Check Enclosed requisitions you will **type 005 in the Category field**.

For Check Enclosed Requisitions you will also need to attach a scanned copy of the invoice/quote. Please follow the instructions for attachments found in the generic/normal requisitions steps. You may want to check the email box as well to ensure the supplier has this information as well. From this point you may complete the requisition by using the generic/normal steps.

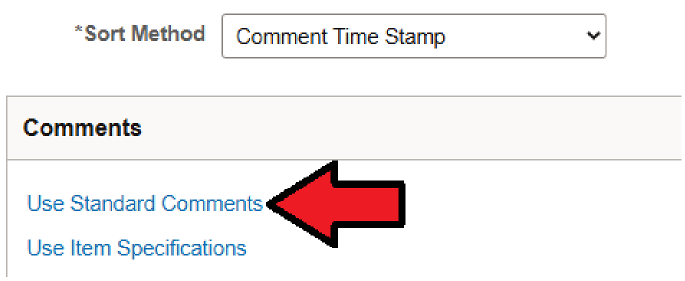
Rate Based Requisition

Following the instructions [Creating A Generic/Normal Requisition]() until you get to the section for entering Requisition Defaults. For Rate Based requisitions you will **type 002 in the Category field**.

For Rate Based reqs you will also need to add Standard Comments. After entering the required information on the Line Item **click Add Comments.**



From the Line Comments pop-up **click Use Standard Comments**.



From the Standard Comments popup **enter RTE (Rate Based) in the Comment Type field** then **enter RTE in the Comment ID field.** When finished **click OK**.

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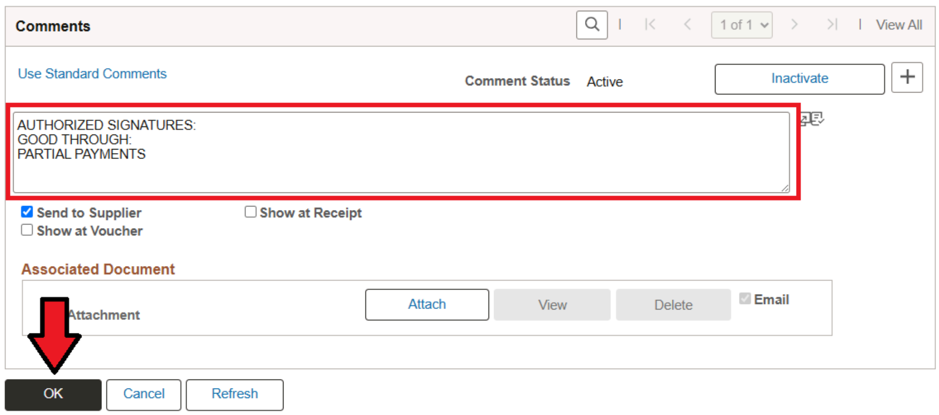
Returning to Line Comments **modify the comment to include the following**:
Authorized Signatures
Good through date
When finished **Click OK**



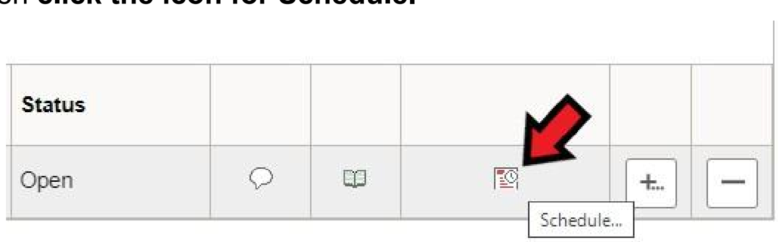
Lastly, make sure to **enter Rate Based Req in the Line Item description** then from this point you may complete the requisition by using the generic/normal steps.

Sensitive Asset Item Requisition

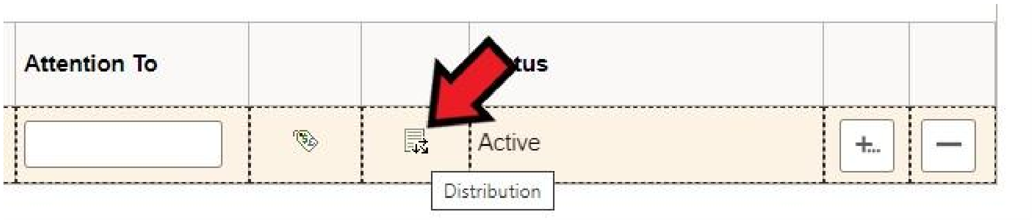
A Sensitive Asset Item is one with a value of $500 to $4,999. Review the Sensitive Asset Profile seen below to determine if this process is needed.

- S3700 Fuel Driven Equipment
  - Snow Blowers
  - Lawn Mowers
- S6700 Projectors/Cameras
  - Video Cameras
  - Projectors
  - Digital Cameras (including lenses)
  - Excludes Mounted Security Cameras
- S6800 Augmentative Communicative Devices
  - All Student Learning Devices
- S7600 Student Use Technical Equipment
  - Digital Music Players (iPods)
  - Mobile/Wireless Speakers
- S7900 Building Services Equipment
  - Pressure Washer

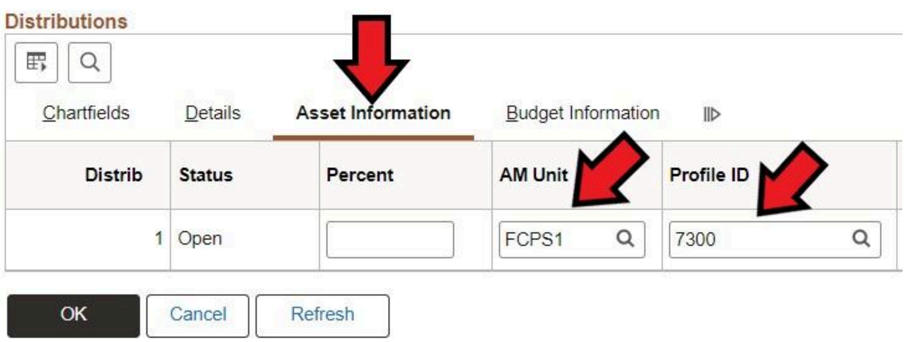
Following the instructions [Creating A Generic/Normal Requisition]() until you get to the section for entering Line Item details. If the item is considered a Capital Asset scroll to the right of the line item detail then **click the icon for Schedule.**



From the Maintain Requisitions screen **click the icon for Distribution**.



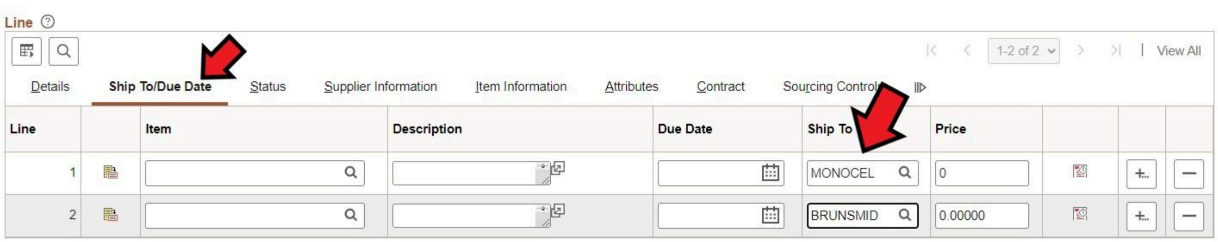
On the Distribution Details screen **click Asset Information** then **confirm or adjust the AM Unit** and **Profile ID** fields as needed. **Click OK** then **Save** to return to the Main Page. From this point you may complete the requisition by using the generic/normal steps.



Ship To Multiple Locations Requisition

In some cases you may have multiple line entries that need to go to different locations.

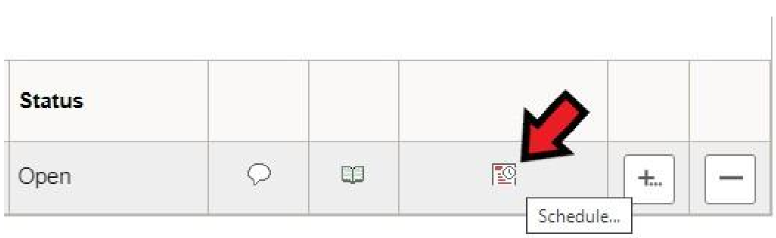
Following the instructions [**Creating A Generic/Normal Requisition**]() until you get to the section for adding Line Items. With each Line Item added make sure to **click Ship To/Due Date** then adjust the **Ship To** field for each line item as needed. When finished you may complete the requisition by using the generic/normal steps.



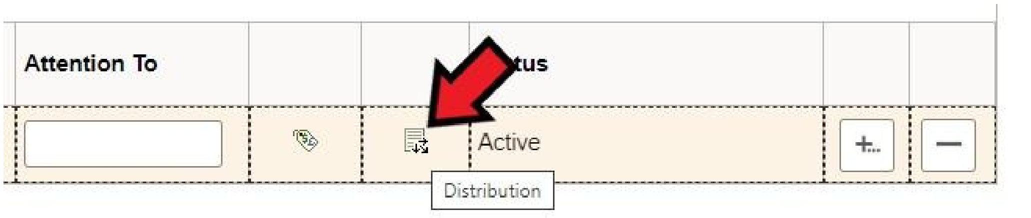
Split Cost Requisition

In some cases you may have to split the cost for a Line Item between two different account strings or have two Line Items with each having a different account string.

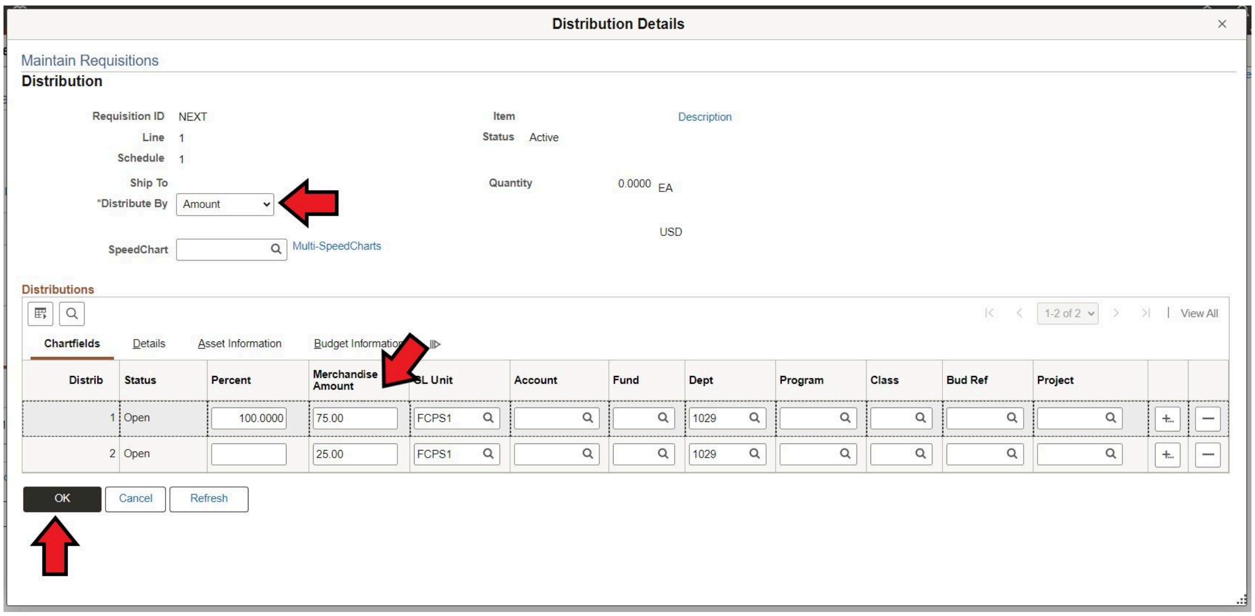
Following the instructions [**Creating A Generic/Normal Requisition**]() until you get to the section for entering Line Item details. After entering the required information **click the icon for Schedule.**



From the Maintain Requisitions screen **click the icon for Distribution**.



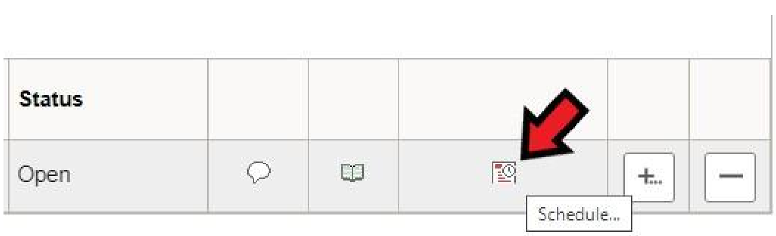
On the Distribution Details screen **click the Distribute By dropdown** and **select Amount**. Then **click the plus button on the Distributions lines to add a row** and **adjust the Merchandise Field as needed. Click OK** then **Save** to return to the Main Page. From this point you may complete the requisition by using the generic/normal steps.



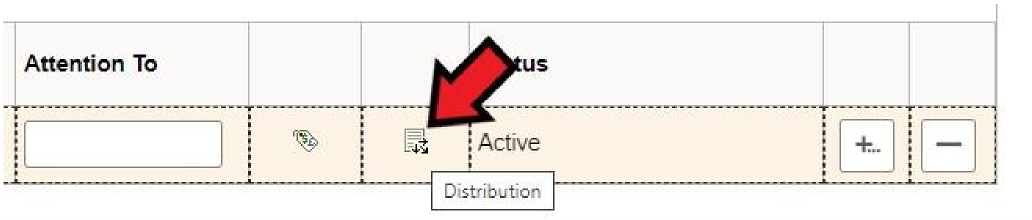
Open PO Requisition

Following the instructions [Creating A Generic/Normal Requisition]() until you get to the section for entering Requisition Defaults. For Open Purchase Order requisitions you will **type 001 in the Category field**.

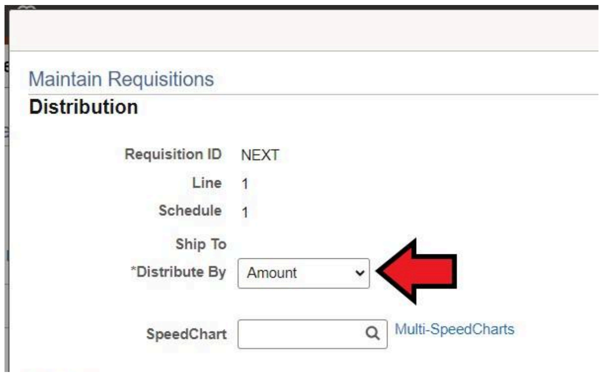
For Open POs you will also need to adjust the Distributed By field. After entering the required information on the Line Item **click the icon for Schedule.**



From the Maintain Requisitions screen **click the icon for Distribution**.

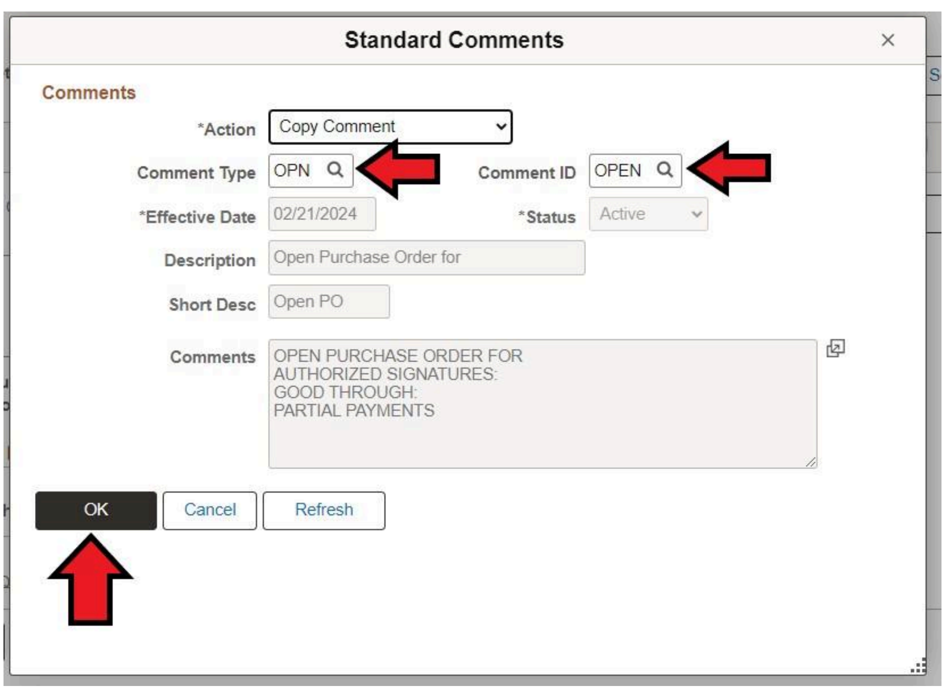


On the Distribution Details screen **click the Distribute By dropdown** and **select Amount**.



Return to the Main Page then **click Add Comments.** From the Header Comments popup **click Standard Comments**.

From the Standard Comments popup **enter OPN (Open Purchase Order) in the Comment Type field** then **enter OPEN in the Comment ID field.** When finished **click OK**.



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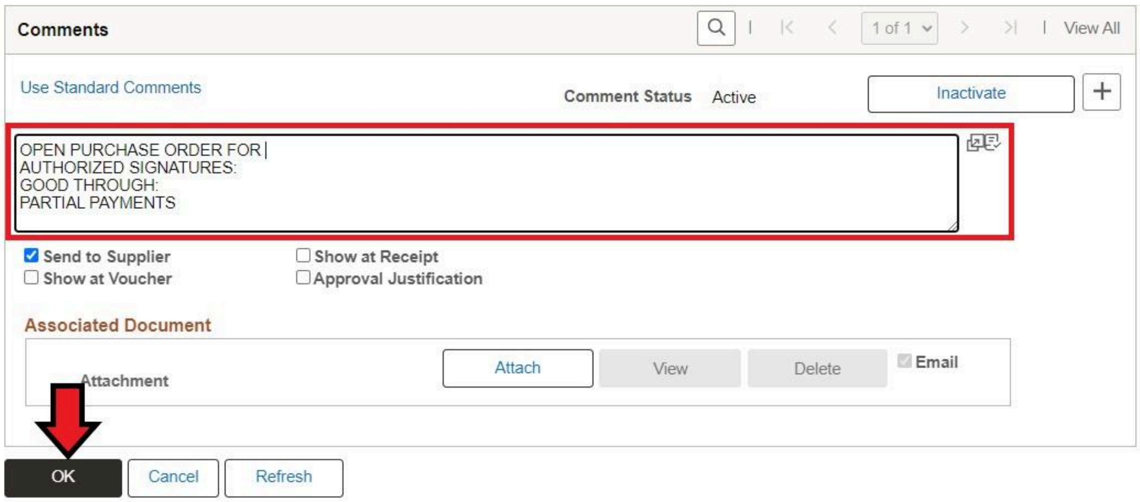
Returning to Header Comments page **modify the comment to include the following**:
The reason for the Open Purchase Order
The individual authorized to purchase
Good through date
When finished **Click OK**



Lastly, make sure to **enter OPEN PURCHASE ORDER in the Line Item description** then from this point you may complete the requisition by using the generic/normal steps.

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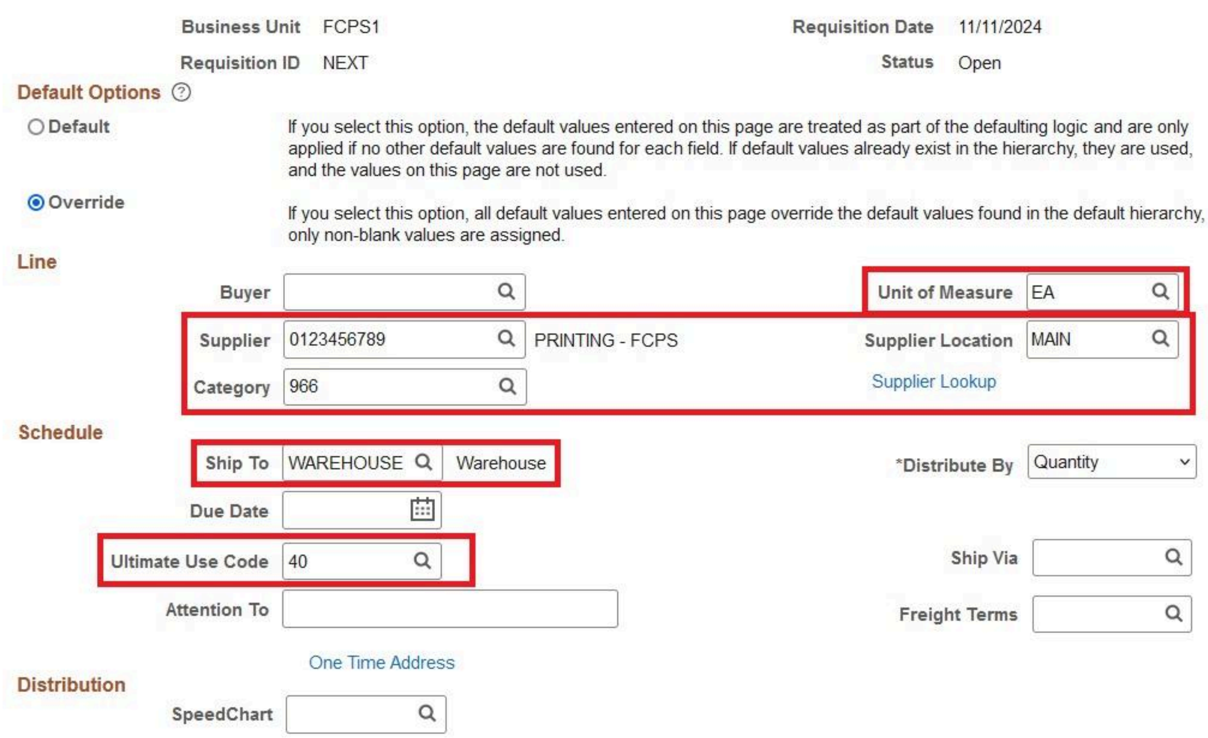
Printing Request Requisition

[Additional Information on Printing Coordination](#)

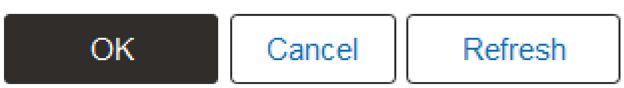
Following the instructions [Creating A Generic/Normal Requisition](#) until you get to the section for entering Requisition Defaults. Use the following information for this specific type of requisition:
Supplier - 0123456789 (PRINTING – FCPS)
Category - 966 (PRINTING & RELATED SVCS)
Unit of Measure - EA
Supplier Location - Leave as defaults
Ship To - WAREHOUSE

Note: Use Warehouse for free shipping. All other locations you will be charged extra for shipping.

Ultimate Use Code - Type 40 (Printing Services)
Account String/Chartfield Information - Use codes provided by the budget department.



When finished **click OK**.



*From this point you may complete the requisition by using the [generic/normal steps](#) with one exception. **Enter the quantity as 1 and the price 0.00**. Once the requisition ends up with Public Affairs they will update those areas as well as supplier.*

Questions

Technical Questions - PeopleSoft Helpdesk - BSG.HELPDESK@fcps.org **PeopleSoft Updates** - Business Services Technology Website **PeopleSoft Documentation Feedback Form**