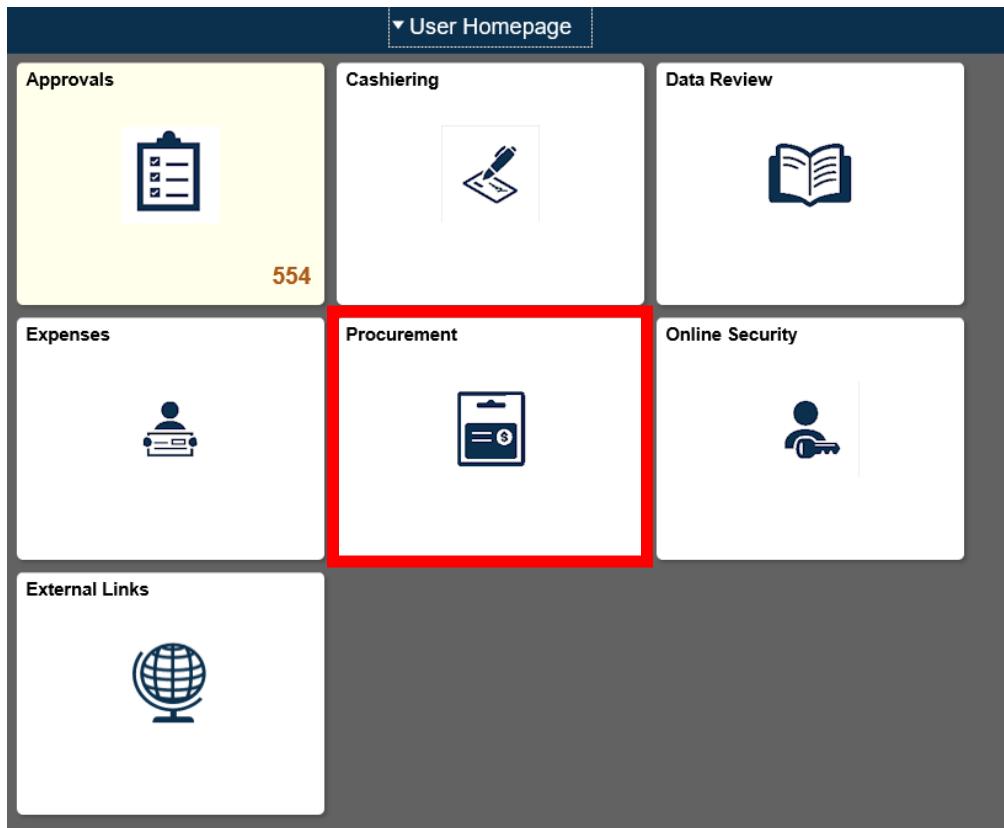


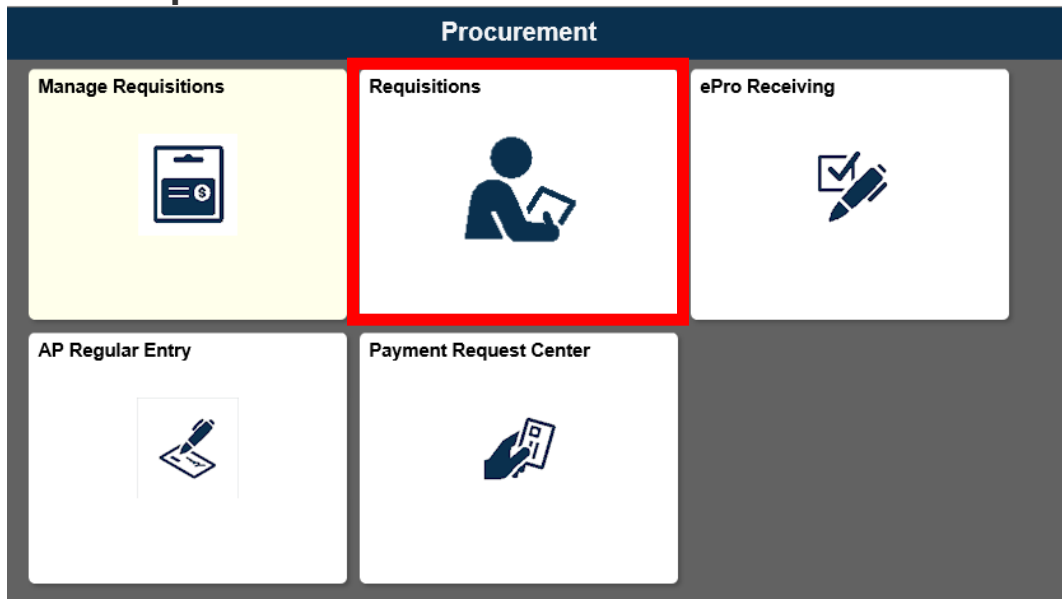
PeopleSoft- Creating a Requisition

1. From the User Home Page, click the **Procurement** tile.



PeopleSoft- Creating a Requisition

2. Click **Requisition** tile.



Create Requisition ?

Welcome Moore,Deonna

[Home](#)

[My Preferences](#)

[Requisition Settings](#)

[0 Lines](#)

[Checkout](#)

Request Options

Search

All

Search

Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.



SmartCART

Browse Supplier Websites



Special Requests

Create a non-catalog request



Forms

Create and Submit Forms



ePro Services

Request Services

Fixed Cost Service

Variable Cost Service

Time and Materials

3. This is the Create Requisition screen.

The Request Options box is a dropdown menu of requisition options to choose from. You may either choose from the dropdown or options in the center of the screen.

4. Click the **Requisition Settings** link.

PeopleSoft- Creating a Requisition

Requisition Settings

Business Unit: CASE1 Case: Western Reserve Univ Requisition Name:

Requester: dgm75 Moore, Deonna Priority: Medium

*Currency: USD Custom Fields

Line Defaults

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

Shipping Defaults

Ship To: DGM75

Accounting Defaults

Chartfields1

Speed Type	Event	Fund	Dept	Project	Class
<input type="text"/>	<input type="text"/>				

OK Cancel

5. Enter Your Speedtype. This is best used when creating orders with multiple lines.
6. If an Event Chartfield applies to this requisition, enter it in the **Event** field. Click on the **Magnifying Glass** icon to locate it in search results.
7. Click **OK** button when finished.

Favorites - Main Menu - > eProcurement - > Requisition

CASE WESTERN RESERVE UNIVERSITY 4311-0446

All Search Advanced Search

Create Requisition

Welcome Moore, Deonna

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

SmartCART Browse Supplier Websites

Special Requests Create a non-catalog request

Forms Create and Submit Forms

ePro Services Request Services Fixed Cost Service Variable Cost Service Time and Materials

PeopleSoft- Creating a Requisition

8. Click the **Special Requests** link to begin placing your order.

Case Western Reserve University eProcurement > Requisition

Home

Create Requisition ?

Welcome Moore, Deonna

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

All Request Options

SmartCART

Special Requests

Forms

ePro Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Suggest New Supplier
Click for Vendor Form

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

9. Enter your item information on this page.

- Enter Item Description
- Enter your price
- Quantity
- Unit of Measure
- Category
- Supplier ID

Once these steps are completed, click **Add to Cart Button**. This will

PeopleSoft- Creating a Requisition

put the item into your shopping cart shown at the top. You will notice that the icon with the shopping cart now has 1 item in it.

Case Western Reserve University

Home | My Preferences | Requisition Settings | 1 Line | Checkout

Request Options | Search: All | Search | Advanced Search

Special Requests

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description:
*Price: *Currency:
*Quantity: *Unit of Measure:
*Category: Due Date:

Supplier

Supplier ID: Suggest New Supplier
Supplier Name: Click for Vendor Form

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

10. After you have completed the process of ordering items, click the **Checkout** box.

PeopleSoft- Creating a Requisition

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit CASE1 Case Western Reserve Univ Requisition Name
Requester dgm75 Moore,Deonna Priority Medium
*Currency USD

Cart Summary: Total Amount 7,999.95 USD
Expand lines to review shipping and accounting details Add More Items

Line	Description	Item ID	Vendor	Quantity	UOM	Price	Total	Details
1	MacBook Pro Laptop Computer			5.0000	Unit	1599.9900	7999.95	

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

Total Amount 7,999.95 USD

Requisition Comments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

11. From the Checkout – Review and Submit screen, you will review your items, and verify that all information is correct. Here, you would also add a Speedtype if you did not enter a default one under Requisition Settings.

Add comments to the **Requisition Comments** section if necessary.

PeopleSoft- Creating a Requisition

Case Western Reserve University

Navigation: Favorites - Main Menu - eProcurement - Requisition

Search: All Search Advanced Search

Line	Description	Item ID	Vendor	Quantity	UOM	Price	Total	Details
1	MacBook Pro Laptop Computer			5.0000	Unit	1599.9900	7999.95	

Shipping Line: 1

*Ship To: RLC31

Address: Cedar Avenue Service Ctr.
10620 Cedar Avenue
Cleveland, OH 44106

Attention To: 202/Rich Cowie

Due Date: [Field]

Quantity: 5.0000
Price: 1599.9900

Accounting Lines

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

Total Amount: 7,999.95 USD

Requisition Comments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit Save for Later Add More Items Preview Approvals

12. After reviewing order, click the **Check Budget** link.

PeopleSoft- Creating a Requisition

Case Western Reserve University

Navigation: Favorites - Main Menu - eProcurement - Requisition

Search: All Search Advanced Search

Line	Description	Item ID	Vendor	Quantity	UOM	Price	Total	Details
1	MacBook Pro Laptop Computer			5.0000	Unit	1599.9900	7999.95	

Shipping Line: 1

*Ship To: RLC31
Address: Cedar Avenue Service Ctr.
10620 Cedar Avenue
Cleveland, OH 44106
Attention To: 202/Rich Cowie
Due Date:

Quantity: 5.0000
Price: 1599.9900

Accounting

Select All / Deselect All

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition v

Requisition Comments

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit Save for Later Add More Items Preview Approvals

13. After reviewing message, click the **OK** button.

PeopleSoft- Creating a Requisition

Favorites - Main Menu - > eProcurement - > Requisition

Home

10620 Cedar Avenue
Cleveland, OH 44106

Attention To 202/Rich Cowie
Due Date

Accounting Lines
*Distribute By Amt

Accounting Lines

Line	Percent	Amount	Speed Type	Account	Event	Fund	Dept	Project
1	100.0000	7,999.95	OPR231125	537400		97600	231125	

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

Total Amount 7,999.95 USD

Requisition Comments
Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification
Enter approval justification for this requisition

Check Budget

Save & submit Save for Later Add More Items Preview Approvals

14. After checking budget, click the **Save and Submit** button. If you need to save the requisition for later, click the **Save for Later** button.

End of Procedure.