Create a Financial Management Online Purchase Requisition

This training document will walk you through how to create non-catalog purchase requisitions using the Financial Management eProcurement module and manage your requisitions through their respective lifecycle. The PeopleSoft eProcurement module provides a cost and time saving solution to the procurement of goods and services. In addition, eProcurement automates internal approvals of purchase requests to improve the purchasing process and expedite orders.

The Requestor assumes the responsibility to:

- Be knowledgeable of the University procedures regarding procurement.
- Understand that if assigning a Delegate for entry purposes, the delegate is authorized to act on your behalf but does not release you, the requestor, of the responsibility to act ethically and in accordance with University travel regulations.

Before You Begin

Prerequisites and Assumptions

Before you can successfully create purchase requisitions within the Financial Management eProcurement module, it is assumed that each of the following conditions has been met:

- You have completed training on how to enter online purchase requisitions.
- Your FMS account has been created and you have been setup as an official requestor by the Purchasing Office.
- You have setup up your Chartfield tabbing order using the pre-set template. Directions are available on the Purchasing website.
- You have added the FMS Toolbox to your MyCWU home page.

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1. Log into MyCWU

![Communication Page](Image)

2. Click on Main Menu on MyCWU Dashboard

![Dashboard](Image)

Navigation: Main Menu > Financial Management > Employee Self Service > Procurement > Manage Requisitions

Or

Click on link for Purchase Requisitions in the FMS Toolbox pagelet.

![FMS Toolbox](Image)

<table>
<thead>
<tr>
<th>Budget Office Information</th>
<th>Contracts, Purchasing, Surplus</th>
<th>FMS User Guides</th>
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</thead>
<tbody>
<tr>
<td>Training</td>
<td>Budget Overview Information</td>
<td>Project Reference Information</td>
</tr>
</tbody>
</table>

Avoid using your browser’s close button to close out of FMS Production. Instead, use the buttons or links at the bottom of FMS pages to return to the previous page. For security purposes, the FMS Production system automatically logs you off after 30 minutes without an option to save.
3. Click on Main Menu

Personalize Content | Layout

Navigation: Main Menu > Financial Management > Employee Self Service > Procurement > Manage Requisitions

4. If you’ve been delegated requisition entry authority for another individual, next to the Requester field click on the Magnifying glass .

Click the Look Up button . See below screen.

Click the appropriate Requestor account in the Search Results area.
5. Lines can be added to Requisitions using 3 different methods: 1) Non Catalog items, 2) Favorites lists, and 3) Previously defined Requisition Templates. The principals covered here are consistent to create a requisition with any of the 3 methods. In addition, please note that a requisition can contain lines that were added in any of these 3 methods simultaneously.

**Manage Requisitions**

<table>
<thead>
<tr>
<th>Requisition Search</th>
<th>Keyword Search</th>
</tr>
</thead>
</table>

**Search Requisitions**

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

- **Business Unit**: CWUID
- **Requisition ID**: 
- **Date From**: 01/11/2014
- **Requester**: SHORTT

[Search] [Clear] [Show All]

![Warning icon] The Requester specified has no Requisitions.

Create New Requisition Review Change Request

Click the **Create New Requisition** link.

6. The Create Requisition page will appear. Enter the information as described below:

Next to the shopping basket, click the **Requisition Settings** link

![Requisition Settings] ![0 Lines]

Refer to the below **Requisition Settings** page
1. **Requisition Name field:**

If desired you can enter a unique requisition name. You may want to make this a meaningful description as this will assist you in searching for requisitions later. If you leave it blank, the system will assign the requisition ID number in this field.

2. **Supplier Field (formerly Vendor) (Optional)** – Enter a default supplier for your requisition lines if desired. Please note that this value may be overridden by line information added to your requisition. *This is not a required field.*

If you know your supplier ID, type it in the Supplier field. If not, select the magnifying glass to access the vendor search page. From here, you can search for valid CWU vendors by a number of attributes, including vendor name.

3. If you know that only one Project ID will be paying for the requisition you can add in the accounting distribution information under the Accounting Defaults area. Enter the **Project** and **Oper Unit** (Operating Unit) values. Leave the Account field blank.

7. To Search for a Supplier, click on the magnifying glass.
Type in the Name field a description of the Supplier (formerly Vendor). You can also search by City and State. Click the Find button. Search results will appear on the page.

Click the Supplier ID link. Then Click the OK button.

Example below.

Click the Special Requests tab.
Fill in the fields with the * next to them. They are required fields.

Enter appropriate information for our purchase in the following fields:

**Item Description** – Enter in Upper Case the appropriate description for your line item. It is a good idea to be detailed in this description to avoid confusion and delay in the procurement process.

**Price** – Enter the unit price of your non-catalog item. Note this should be without tax added in.

**Quantity** – Enter the quantity of this item you wish to purchase at this time.

**Category field** – Click the magnifying glass.

Click on the Find button and see all values. Find the appropriate item and click it. It will be added to your line item. Or you can change the Search by from Category to Description. Type in a portion of the Category description and select the Find button to narrow your
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search (in this example, a category that contained “Postage” was searched – resulting in one returned value – POSTAGE). Select a category value to add it to your line item.

Select the value. You will see your item indicated now on the left side of your screen. See below example.

Note: Another helpful hint is to sort by Category code. Click the word Category and it will sort the numbers by order. The A9XX numbers are services.

Note: You may either Search or Browse to look up the appropriate category for your special request.

<table>
<thead>
<tr>
<th>Catalog</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Non Catalog</td>
<td>A010</td>
<td>ADVERTISING</td>
</tr>
<tr>
<td>2 Non Catalog</td>
<td>A045</td>
<td>APPLIANCES AND EQUIPMENT</td>
</tr>
<tr>
<td>3 Non Catalog</td>
<td>A050</td>
<td>ART EQUIPMENT AND SUPPLIES</td>
</tr>
<tr>
<td>4 Non Catalog</td>
<td>A012</td>
<td>ATHLETIC SUPPLIES</td>
</tr>
</tbody>
</table>

10. Click the **Add to Cart** at the bottom of the page.

**Do Not Use the Manufacturer or Request New Item areas.**

11. At the top of the page next to the shopping cart, you will now see it indicates has been added.

If you do not have any more lines, continue to the checkout button

If you have more items to add continue entering more special requests and add them to the shopping cart.

12. Under the Requisition Lines area click the next to the line number. See below example.
From this page, the requestor can review the detail of the requisition, make any necessary modifications prior to budget checking, saving, and submitting the transaction for approval.

To review and/or modify the accounting distribution information for your line, select the triangle next to Accounting Lines (see above example).

If you did not fill in the accounting distribution information under the Requisition Settings, enter the appropriate Project ID and Oper Unit (Operating Unit) fields.

If you are splitting the transaction with multiple budgets, click
Step-by-Step Guide

13. The *Distribute By* drop down list and pick either Qty or Amt. Adjust either the dollar amount or quantity fields, and then click the + button to add an additional row. Fill in the appropriate Project ID and Operating Unit fields.

At this point, you may also want to consider attaching comments and/or attach documents to your requisition. This functionality is available at the Requisition Line header under Comments. Click the Add icon next to your line.
When you click Add next to the comments bubble, the above Line Comment page opens. Enter information that either approvers or the purchasing buyer staff will need to review. Check the box Send to Vendor if needed.

To add attachments, you would click on the Add Attachment button (see above)

Find the file you need to upload by using the Browse button.
Find the document you want to upload and click the **Open** button.

**File Attachment**

![Choose File to Upload]

Click the **Upload** button.
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Click the **OK** button.

If you need to add more comments about the entire requisition enter them in the **Requisition Comments** area.

**Requisition Comments**

Enter requisition comments

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14. At this point, you are ready to save the requisition. Click on the **Save For Later button** at the bottom of the page. After clicking this button you can preview the approval chain by clicking on the **Preview Approvals** button.

Note the number of requisition lines and the defined approval levels.

See below example:
If you see the Project Manager approval level and a value of Multiple Approvers, you can click this link to find who will be approving this step. On the above example, line 2 has multiple project ID’s that are paying for this line item. The last step in this example is the buyer approval.
If you are ready to submit this requisition, click the **Save and Submit** button. Depending on your requisition, different approval routings will be required. At this point, your requisition has been successfully saved and routed for approval. You can't modify the requisition after it has been submitted for approval unless it has been denied and sent back to you.

If you still need to add detail to the requisition, you can click on the **Add More Items** button or if you have to leave the system return to the Manage Requisitions and find your requisition and edit it.

Once you click the Save and Submit button, the Approval screen will appear and show the first step with a clock in front of it. See below example.
You can view and interact with the lifecycle of your requisition by using the Manage Requisitions hyperlink. You can search by different dates, request status or requestor.
As a requestor, when you click the "Submit" button on the requisition transaction, it automatically begins the Workflow approval process. Your responsibility for this transaction has ended, unless it is returned to you for modifications. You do not need to notify an approver that the transaction is waiting on their approval.

Approvers are automatically notified by email from the eProcurement module that they have a transaction that is waiting for their approval.

If you have any questions, please contact the Purchasing Office (509-963-1001) or email purchasing_office@cwu.edu.