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 Procurement module within MyCWU 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, it 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

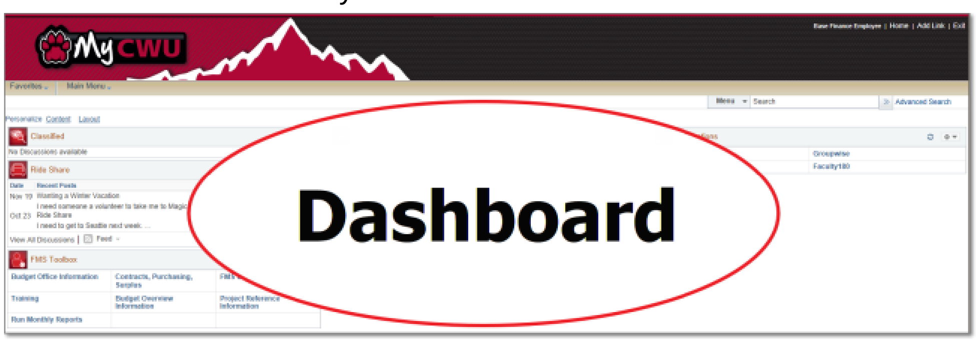
Prerequisites and Assumptions

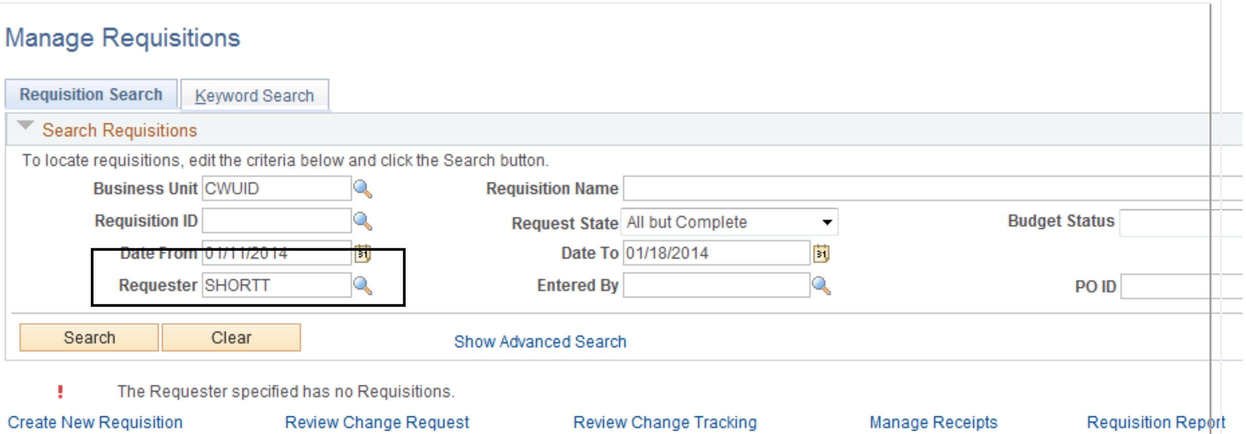
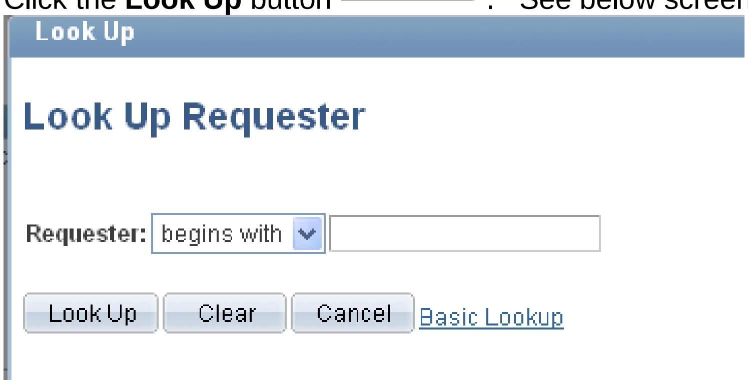
Before you can successfully create purchase requisitions within the Financial Management eProcurement module, it is assumed that each of the following conditions has been met:

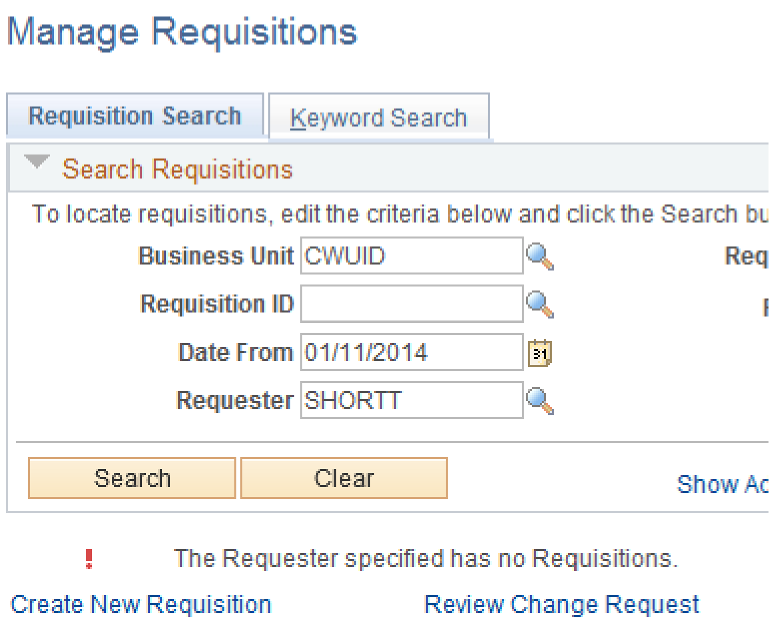
- ☐ You have completed training on how to enter online purchase requisitions.
- ☐ Your FMS account has been created and you have been setup as an official requestor by the Purchasing Office.
- ☐ You have setup up your Chartfield tabbing order using the pre-set template. Directions are available on the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

Quick Help…

Create New Requisition ……………………………………………..Page 4
Requisition Settings ………………………………………………………..Page 5
Supplier Information …………………………………………………… Page 5-6
Special Requests …………………………………………………………… Page 7
Review and Submit Section ……………………………………………… Page 8-9
Attachments/Comments ………………………………………………….. Page 10-12
Preview Approvals ………………………………………………………….. Page 13

1.	Log into MyCWU 
2.	Click on Main Menu on MyCWU Dashboard  Navigation: **Main Menu > Financial Management > Employee Self Service > Procurement > Manage Requisitions** **Or** **On the Employee link, click on link for Purchase Requisitions in the FMS Toolbox pagelet.**  CAUTION 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  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 Look Up . 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.

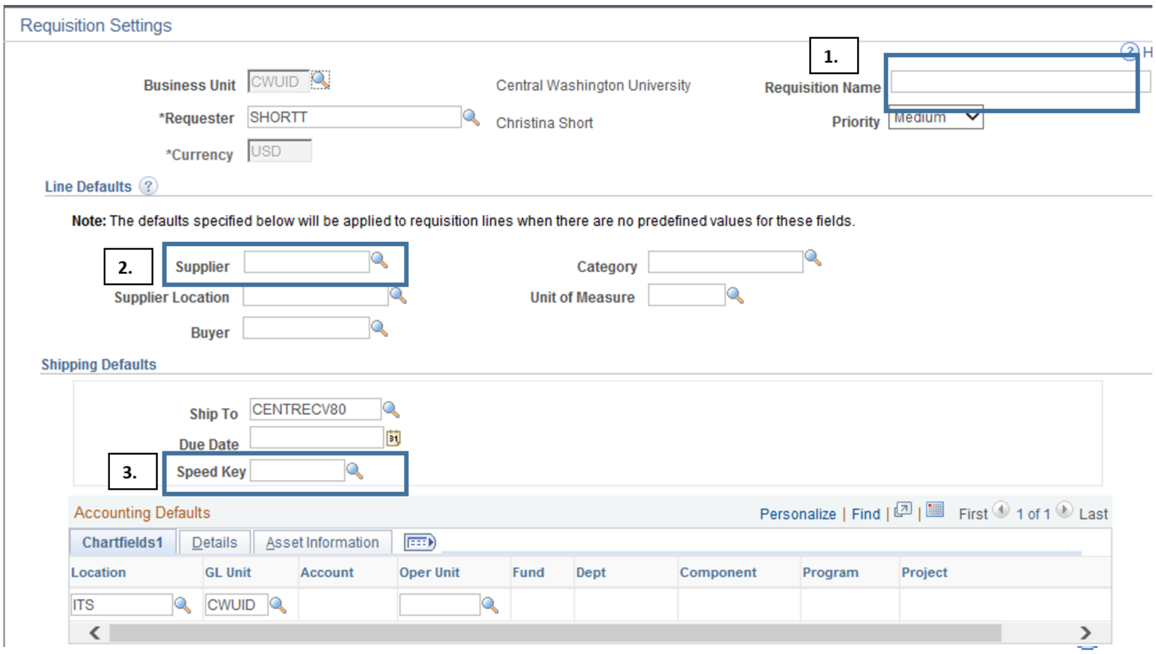


Click the **Create New Requisition** link.

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

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

Refer to the below **Requisition Settings** page



1. **Requisition Name** field: 

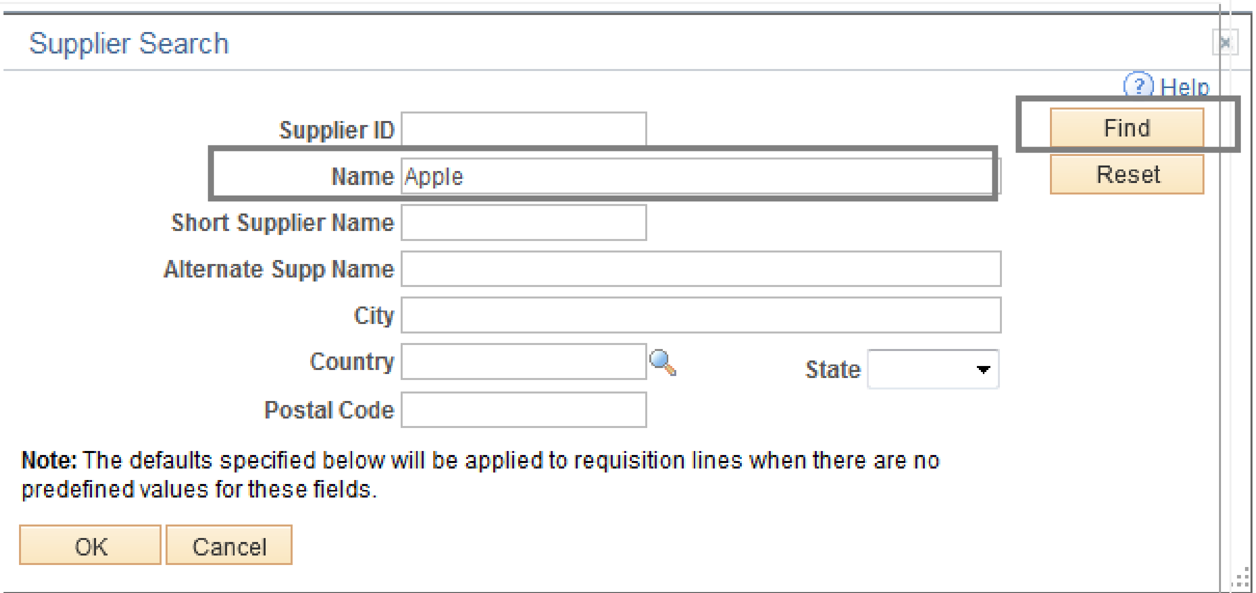
   If desired, you can enter a unique requisition name. You may want to make this a meaningful description as this will assist you in searching for requisitions later. If you leave it blank, the system will assign the requisition ID number in this field.

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 Speed Key will be paying for the requisition you can add in the accounting distribution information under the Accounting Defaults area. Enter the **Speed Key** value. Operating Unit will default in based on the value of the Speed Key.

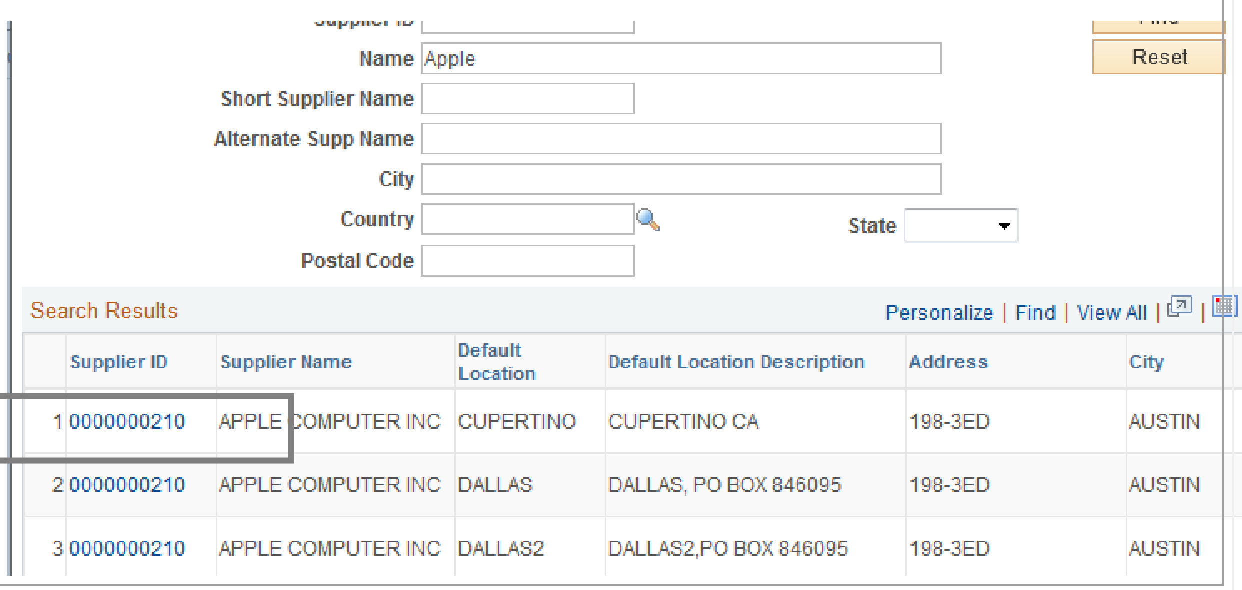
7. To Search for a Supplier, click on the magnifying glass. 



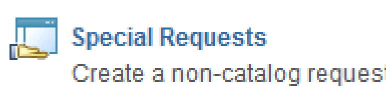
Type in the **Name** field a description of the Supplier (formerly Vendor). You can also search by City and State. Click the **Find** button. Search results will appear on the page.

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

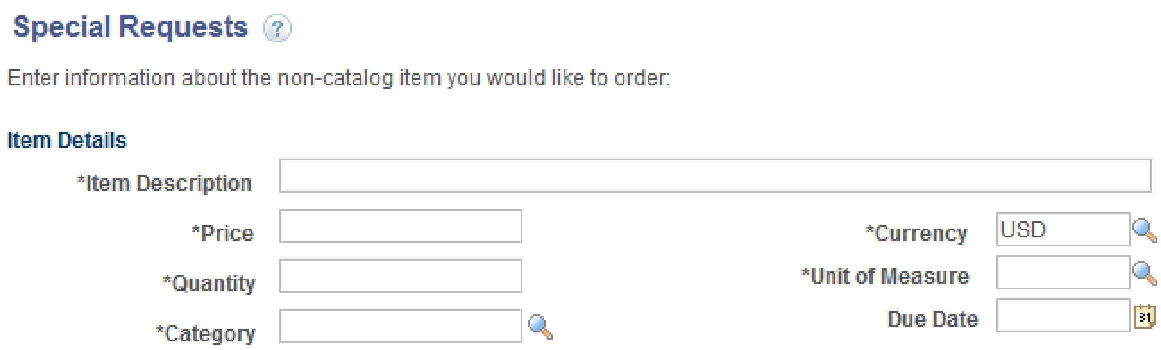
Example below.



8.



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 with-out tax added in.

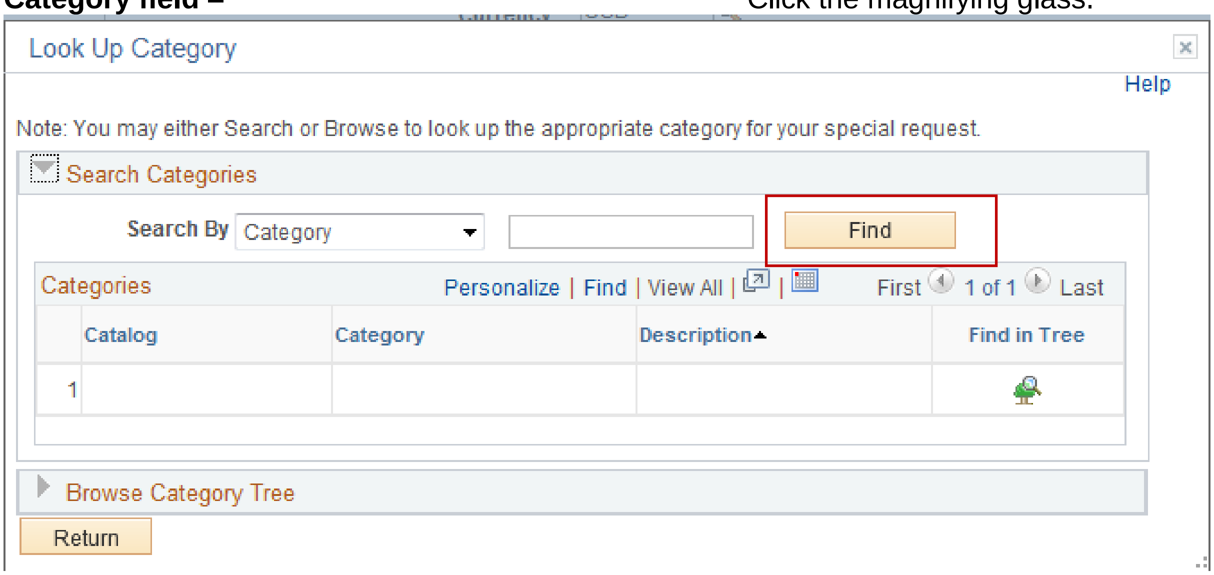
Quantity – Enter the quantity of this item you wish to purchase at this time.

Unit of Measure– Enter the type of unit (example EA).

9.

Category field – 

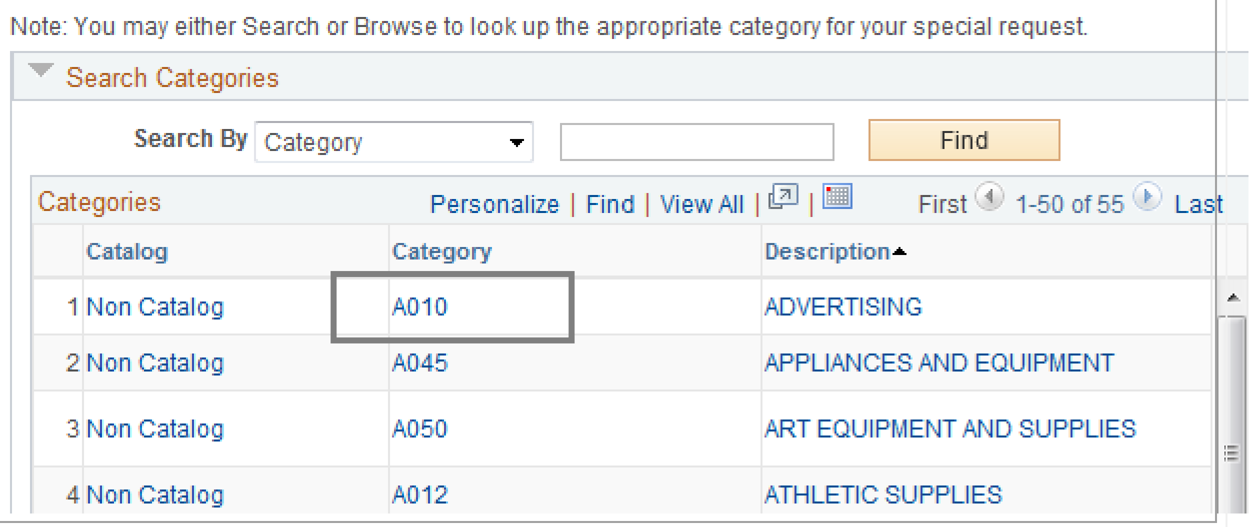
Click the magnifying glass.



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 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.



	Catalog	Category	Description
1	Non Catalog	A010	ADVERTISING
2	Non Catalog	A045	APPLIANCES AND EQUIPMENT
3	Non Catalog	A050	ART EQUIPMENT AND SUPPLIES
4	Non Catalog	A012	ATHLETIC SUPPLIES

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

Do Not Use the Manufacturer field or check box for Send to Supplier.

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

1 Line has been added.

At this point, you are ready to save the requisition.

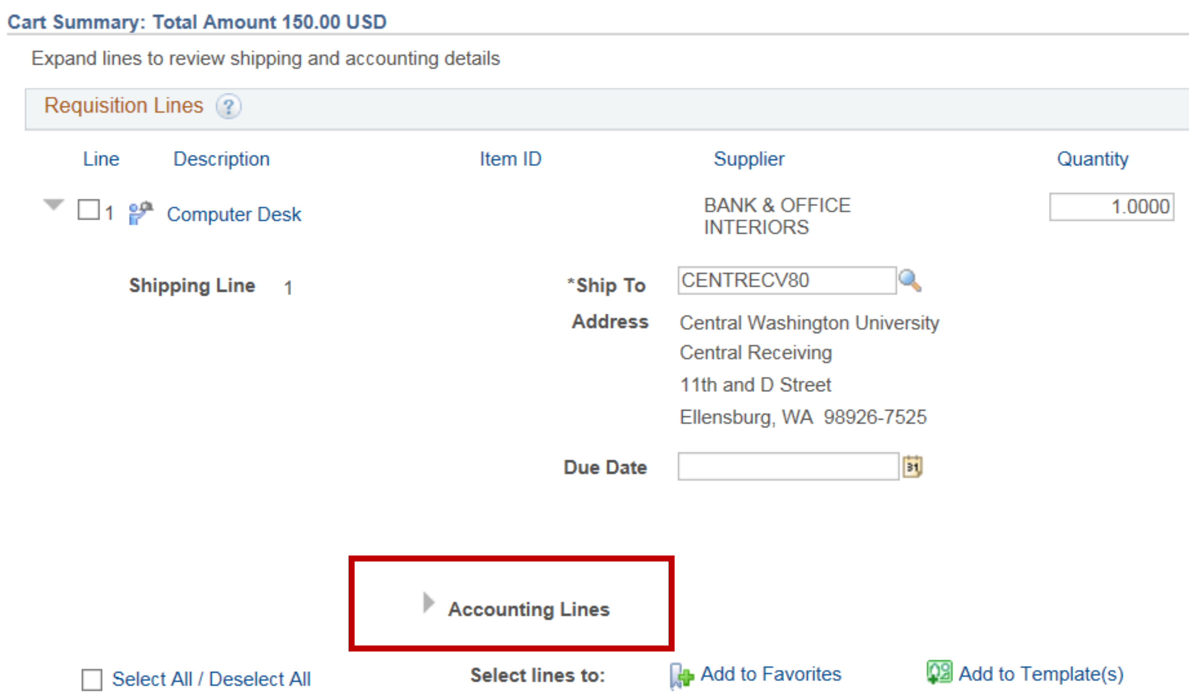
not have any more lines, continue to the checkout button Checkout

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

12. Click on the **Save For Later button** Save for Later at the bottom of the page.

Check out- Review and Submit Section

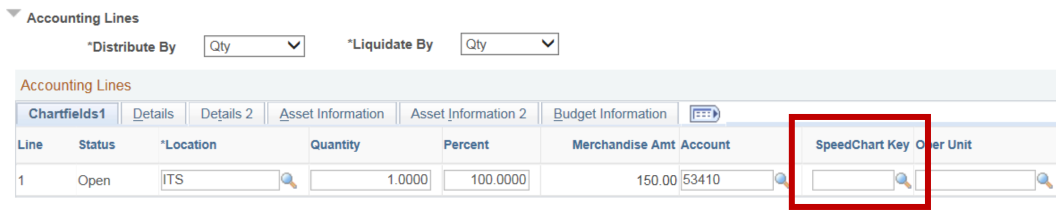
Under the Requisition Lines area click the next to the line number. See below example.



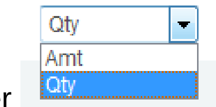
From this page, the requestor can review the detail of the requisition, make any necessary modifications prior to saving, and submitting the requisition for approval.

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

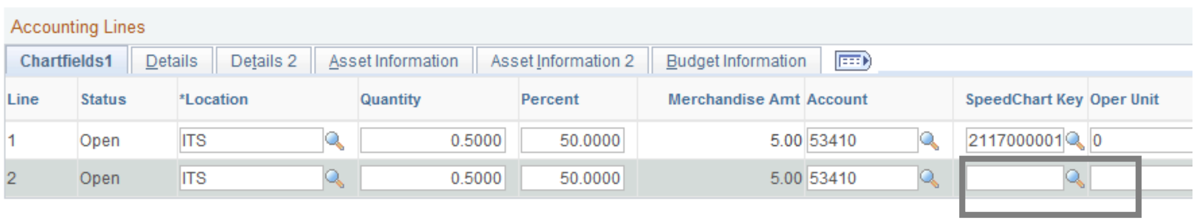
If you did not fill in the accounting distribution information under the Requisition Settings, enter the appropriate SpeedChart Key field. ***Note:*** Once you enter these values and click save, the SpeedChart Key field will show empty but all the Chartfields such as Dept, Fund, Program, Operating Unit, (optional) Component will have values based on the SpeedChart Key.



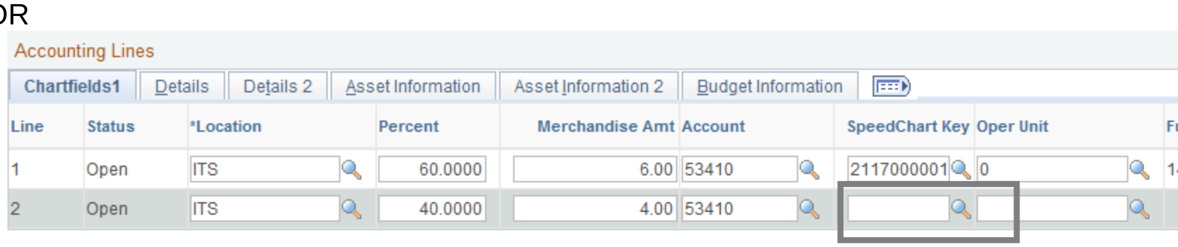
If you are **splitting the transaction** with multiple budgets, click the 

drop down list and pick either 

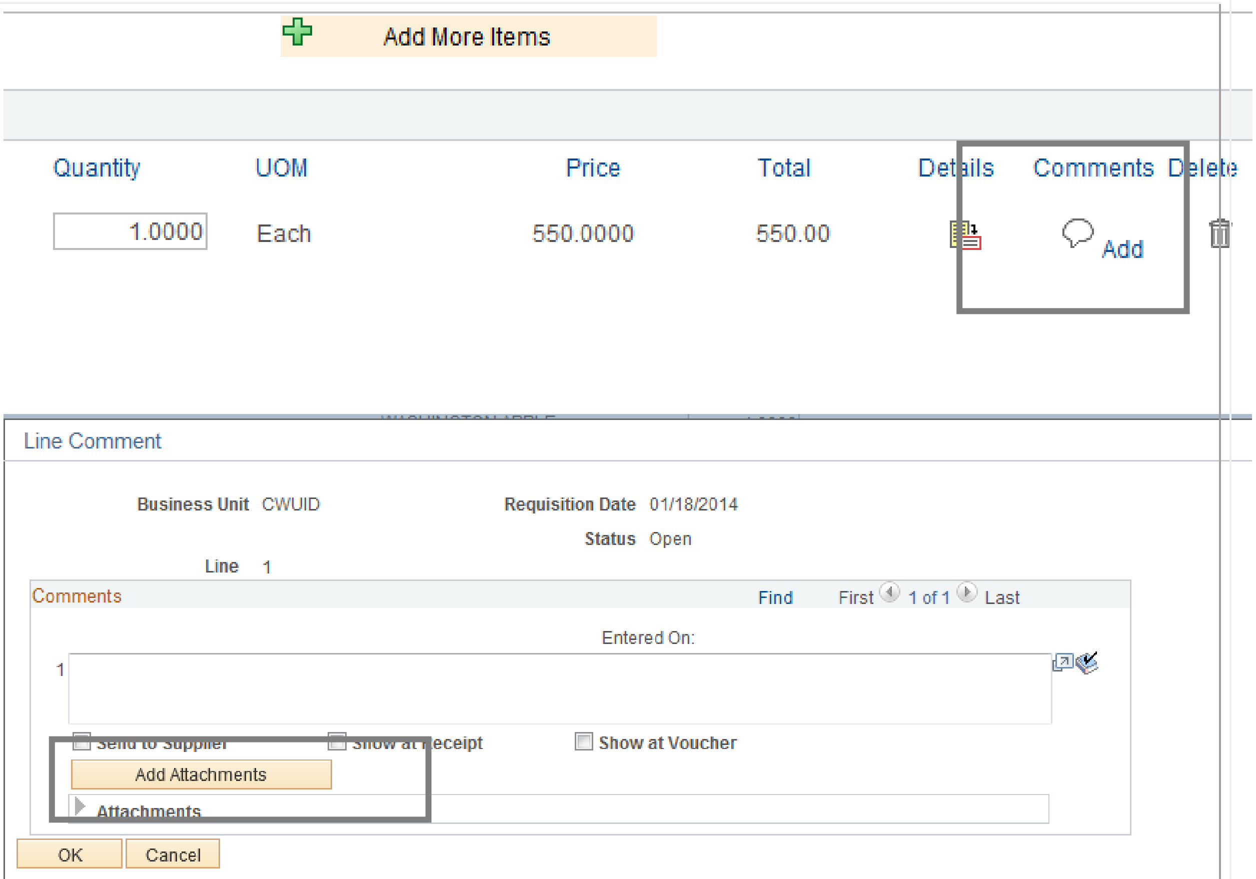
Adjust either the dollar amount or quantity fields, and then click the  to add an additional row. Fill in the appropriate SpeedKey field. Note: Operating Unit will default in based on SpeedKey entered.



OR

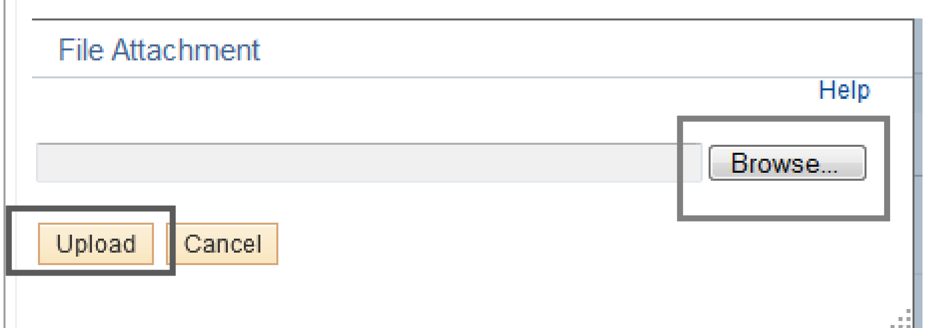


13. At this point, you may also want to consider **attaching comments and/or attach documents** to your requisition. This functionality is available at the Requisition Line header under Comments. Click the Add  next to your line.

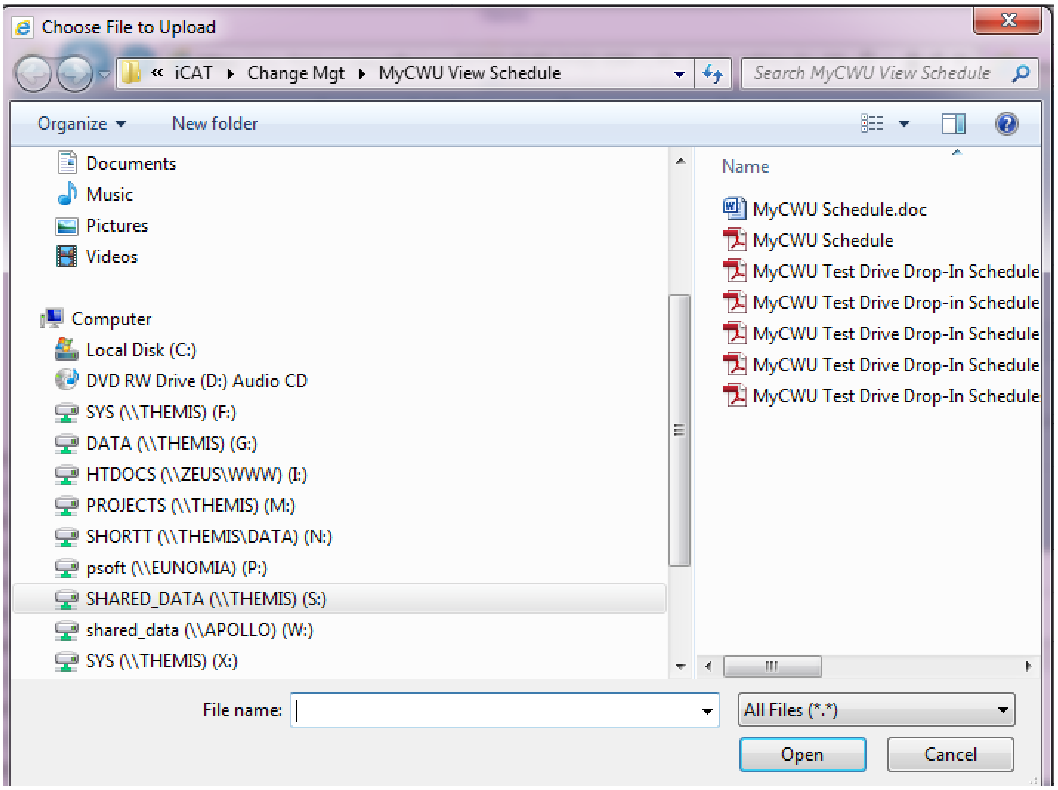


When you click Add next to the comments bubble, the above **Line Comment** page opens. Enter information that either approvers or the purchasing buyer staff will need to review. Check the box **Send to Vendor** if needed.

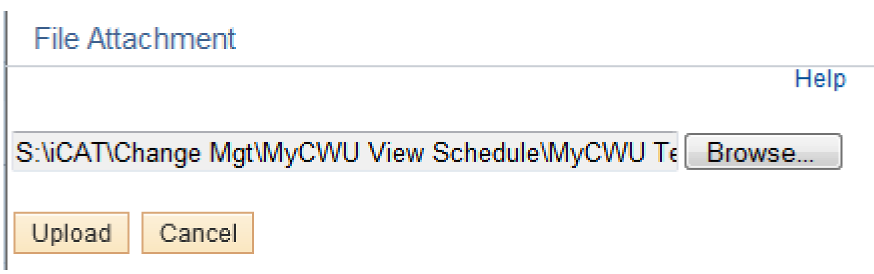
To add attachments, you would click on the **Add Attachment** button (see above)



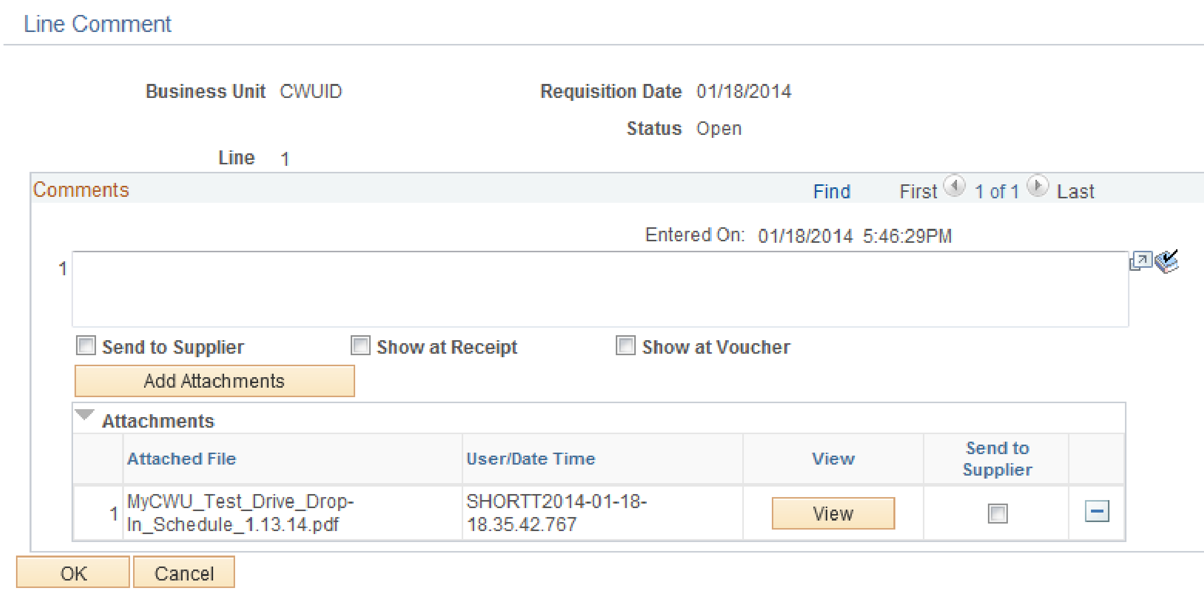
Find the file you need to upload by using the Browse button.



Find the document you want to upload and click the **Open** button.

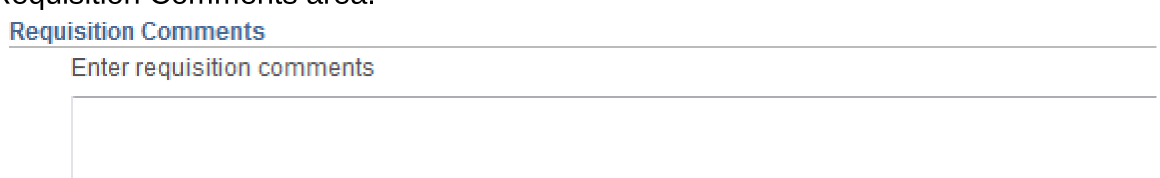


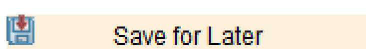
Click the **Upload** button.



Click the **OK** button.

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



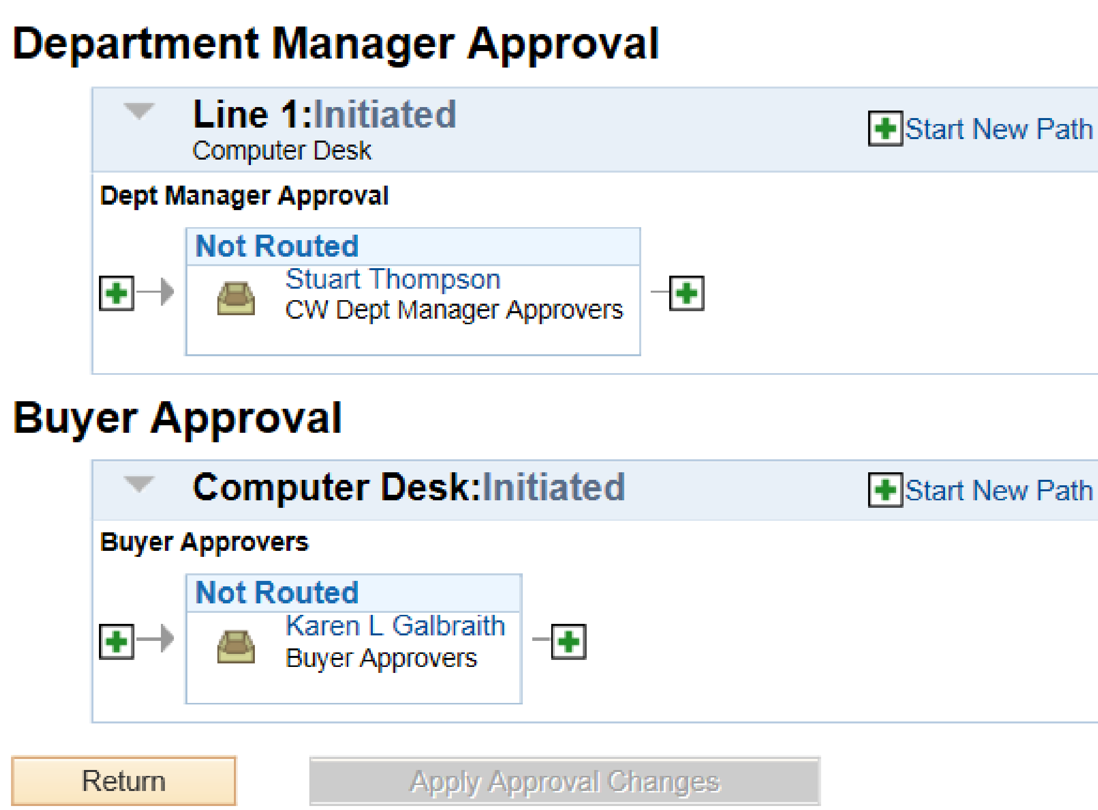
At this point, you are ready to save the requisition. Click on the **Save For Later button** 

at the bottom of the page. After clicking this button you can preview the approval chain by clicking on the **Preview Approvals** 

button.

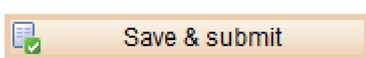
Note the number of requisition lines and the defined approval levels.

See below example:



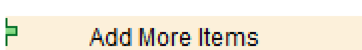
If you see the Department Manager approval level and a value of Multiple Approvers, you can click this link to find who will be approving this step. On the above example, line 2 has multiple project ID's that are paying for this line item. The last step in this example is the buyer approval.

If you are ready to submit this requisition, click the **Save and Submit**



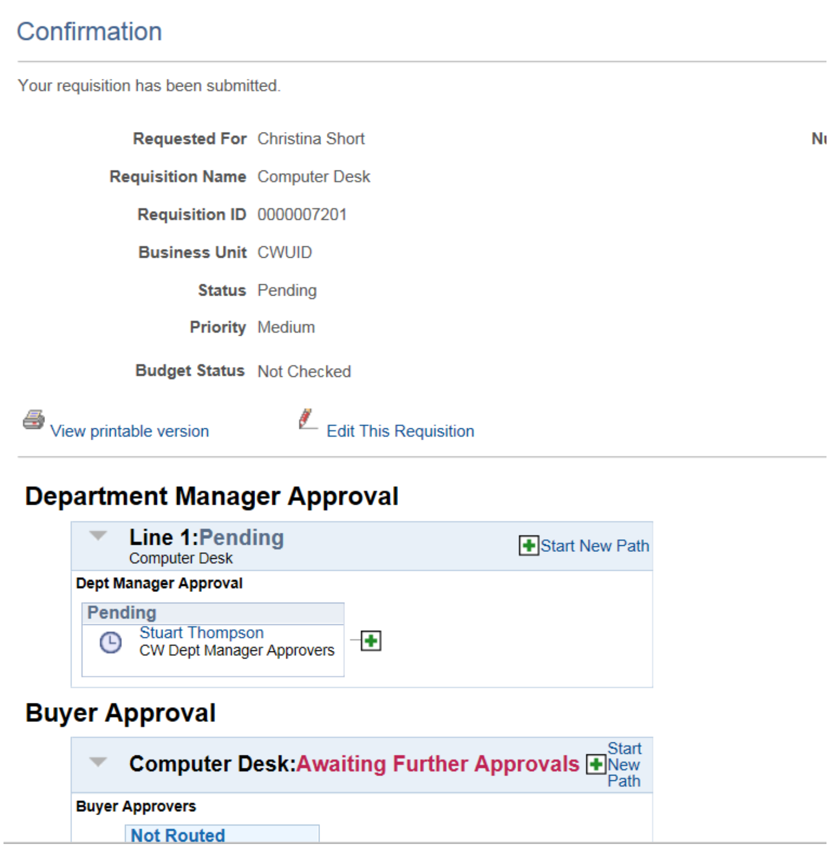
button. Depending on your requisition, different approval routings will be required. At this point, your requisition has been successfully saved and routed for approval. You can't modify the requisition after it has been submitted for approval unless it has been denied and sent back to you.

If you still need to add detail to the requisition, you can click on the **Add More Items**

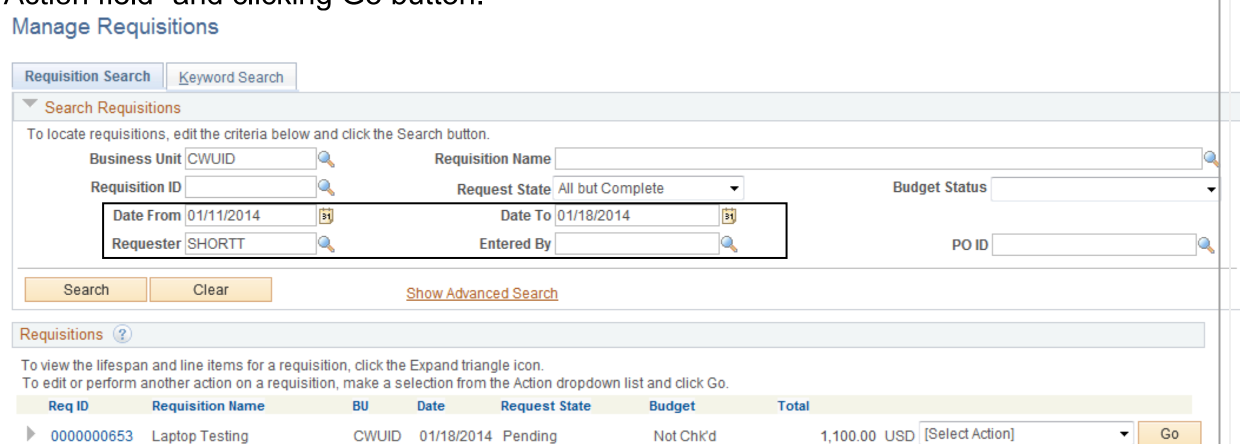


button or if you have to leave the system return to the Manage Requisitions and find your requisition and edit it.

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.



15. 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. You can also Edit, Copy, or cancel your requisitions from this page by using the “Select Action field” and clicking Go button.



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 MyCWU Financial System that they have a transaction that is waiting for their approval.

System generated email to the approver's inbox

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