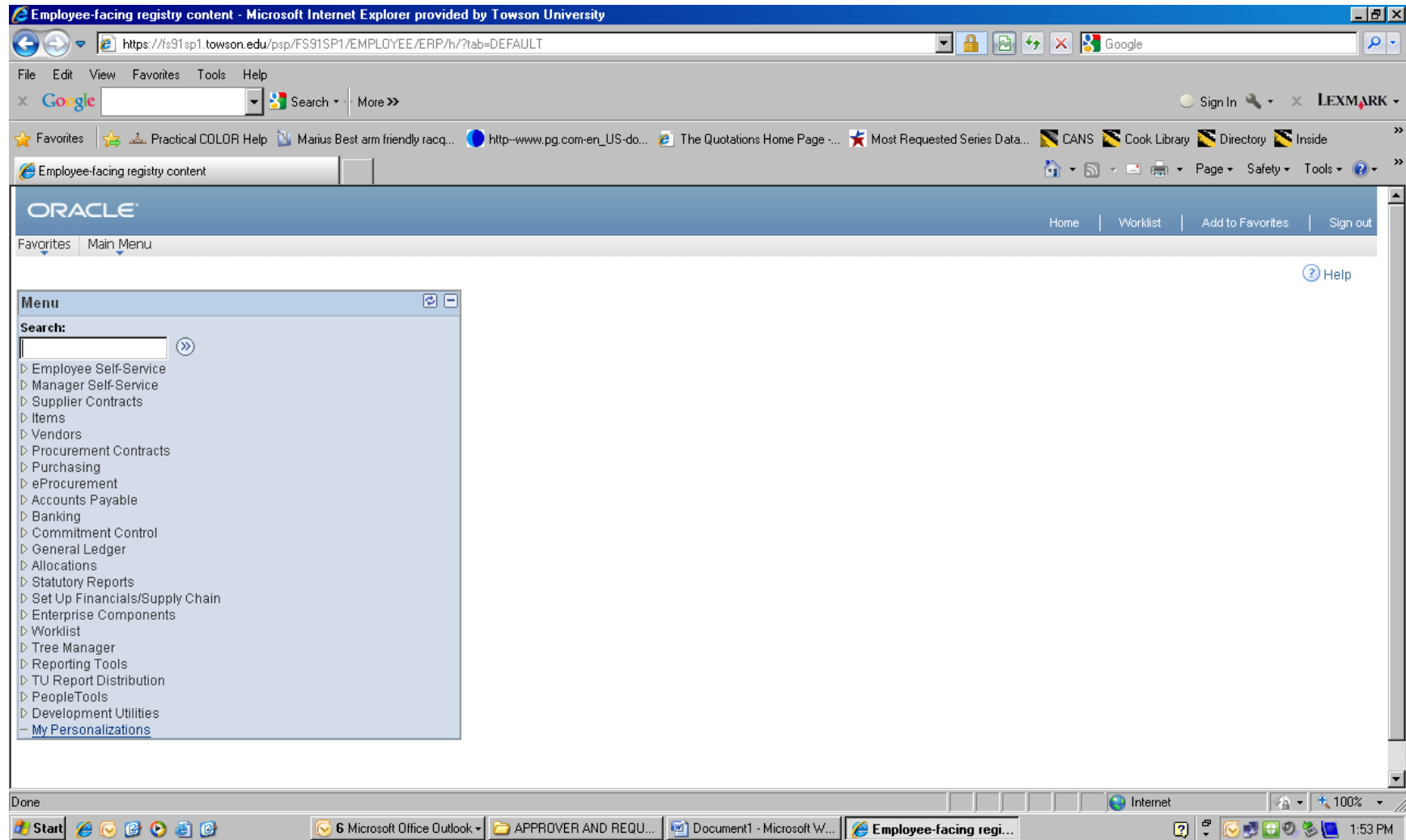


# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

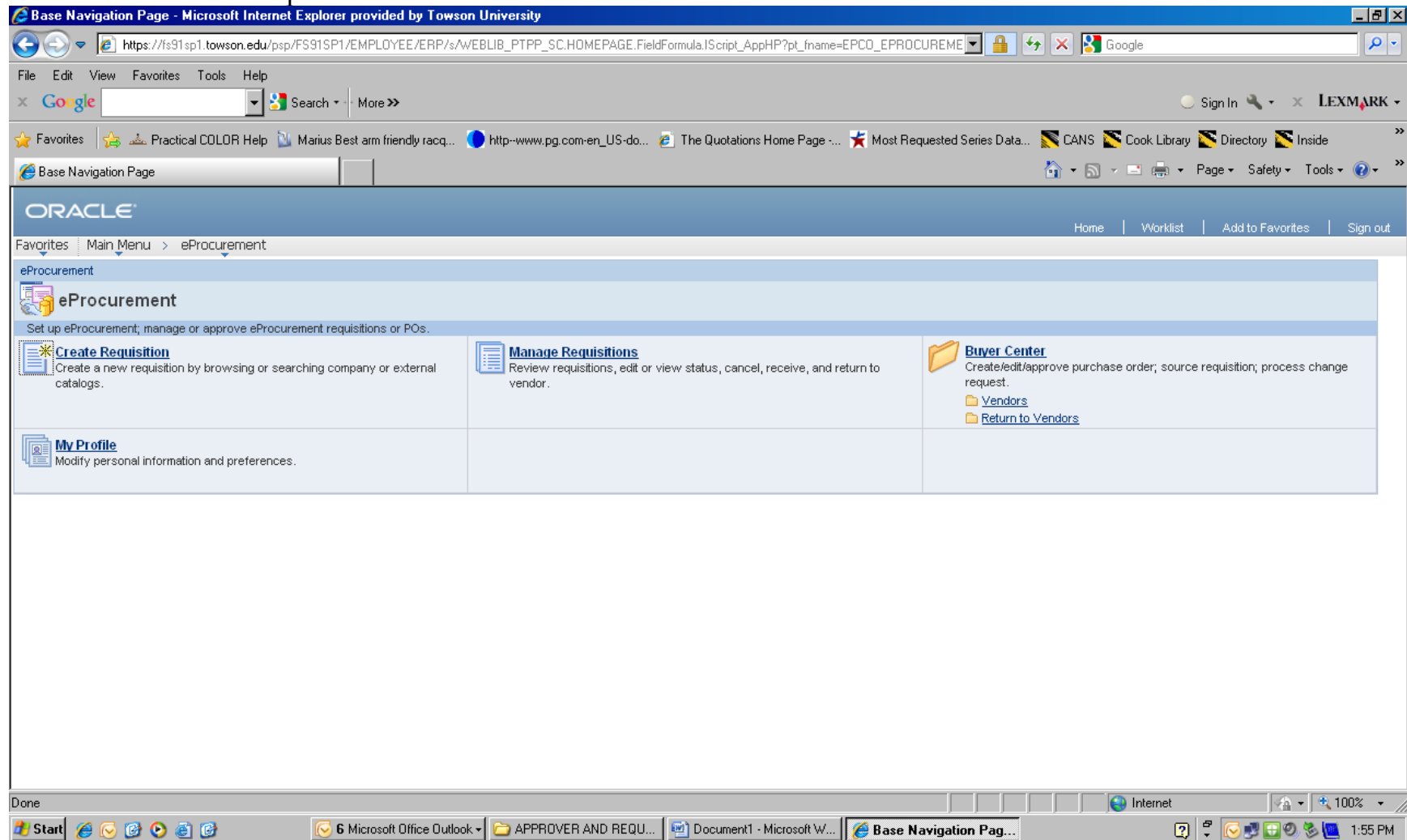
Click the “eProcurement” link.



# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Click the “Create Requisition” link.



# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Enter a name for your requisition. This will make it easier to look up the requisition in the future.  
Set the Accounting Date according to the desired fiscal year. (7/01 or later for next fiscal year)

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: TOWSN Towson University

Requester: LPERKIN Lynn E. Perkins

Requisition Name: [ ] Accounting Date: 10/07/2011 Priority: Medium

Currency: USD

Line Defaults

Continue

Requisition Summary

There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Click either the “Continue” button or “2. Add Items and Services” to proceed.

The screenshot displays the Oracle PeopleSoft Financials 9.1 'Create Requisition' web application interface. The browser window is titled 'Create Requisition - Microsoft Internet Explorer provided by Towson University'. The URL is [https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU\\_PV\\_REQ\\_ENTRY.GBL?PORTALPARAM\\_PTCNAV=EP\\_PV\\_REQ\\_ENTI](https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV_MAIN_MENU_PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTI). The page features a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out' options. The main content area is titled 'Create Requisition' and includes a progress bar with three steps: '1. Define Requisition' (highlighted), '2. Add Items and Services', and '3. Review and Submit'. Below the progress bar, a text prompt reads: 'Specify requisition name, requester, and other information that applies to the entire requisition.' The form contains the following fields: 'Business Unit' (TOWSN, Towson University), 'Requester' (LPERKIN, Lynn E. Perkins), 'Requisition Name' (Commodity Traing Requisition), 'Accounting Date' (10/07/2011), 'Currency' (USD), and 'Priority' (Medium). A 'Continue' button is located below the 'Line Defaults' section. On the right side, a 'Requisition Summary' box displays: 'There are no lines on this request. Please add new line in order to save this requisition.' Below this, it shows 'Total Lines: 0' and 'Total Amount (USD): 0'. The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time '2:11 PM'.

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Click the “Special Item” link.

The screenshot displays the Oracle PeopleSoft Financials 9.1 interface for creating a requisition. The browser window is titled "Create Requisition - Microsoft Internet Explorer provided by Towson University". The URL is [https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU\\_PV\\_REQ\\_ENTRY.GBL?PORTALPARAM\\_PTCNAV=EP\\_PV\\_REQ\\_ENTI](https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV_MAIN_MENU_PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTI). The page features a navigation bar with "Home", "Worklist", "Add to Favorites", and "Sign out" links. The main content area is titled "Create Requisition" and includes a progress indicator with three steps: "1. Define Requisition", "2. Add Items and Services" (highlighted), and "3. Review and Submit". Below the progress indicator, there is a search bar and a "Search" button. The "Special Request" tab is selected, and the "Special Item" link is highlighted in the "Select a Request Type" section. The "Requisition Summary" box on the right indicates there are no lines on the request.

**ORACLE**

Home | Worklist | Add to Favorites | Sign out

Favorites: Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:  Search

Catalog | Favorites | Templates | Forms | Web | **Special Request**

**Select a Request Type**

- [Special Item](#) Request an item that is not listed in the Catalog.
- [Fixed Cost Service](#) Request a one-time service for a flat fee.
- [Variable Cost Service](#) Request a service for which the fee is based on the time worked.
- [Time and Materials](#) Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

**Requisition Summary**

There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0

Done

Start | Microsoft Office Outlook | APPROVER AND REQU... | Document1 - Microsoft W... | Create Requisition - ... | Internet | 100% | 2:14 PM

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Click the small folder with the + sign to open the Category Tree.

**ORACLE**

Home | Worklist | Add to Favorites | Sign out

Favorites: Main Menu > eProcurement > Create Requisition

### Create Requisition

1. Define Requisition | **2. Add Items and Services** | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:  Search

Catalog | Favorites | Templates | Forms | Web | **Special Request**

#### Special Item

\*Item Description:

\*Price:  \*Currency:

\*Quantity:  \*Unit of Measure:

\*Category:

Vendor ID:

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

[Suggest New Vendor](#)

Additional Information | **Request New Item**

#### Requisition Summary

There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0

Start | 6 Microsoft Office Outlook | APPROVER AND REQU... | Document1 - Microsoft W... | **Create Requisition - ...** | Internet | 100% | 2:23 PM

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

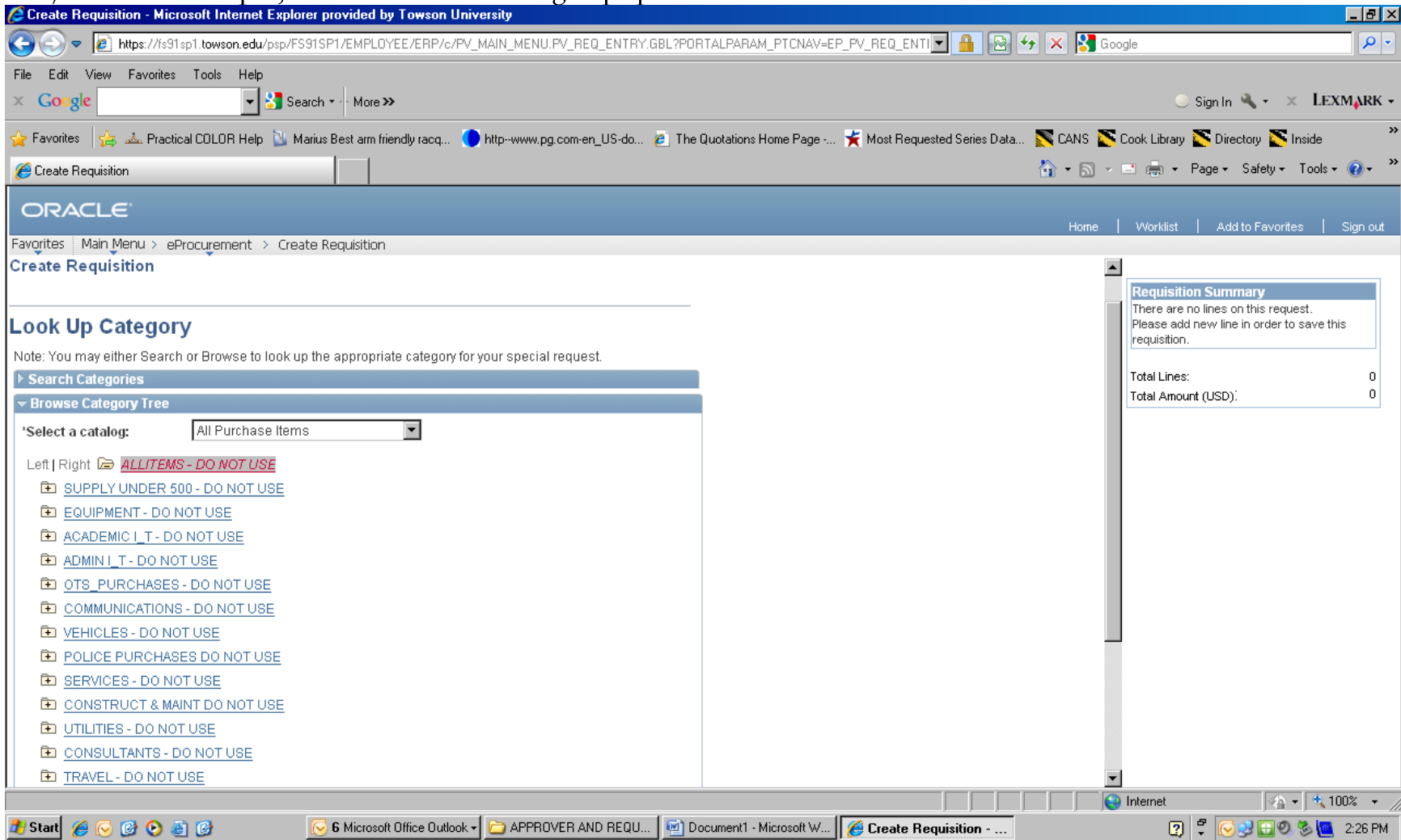
Click the + sign on the folder containing the appropriate category. In this example, click “Equipment”.

The screenshot shows the Oracle PeopleSoft Financials 9.1 'Create Requisition' web application. The browser is Microsoft Internet Explorer provided by Towson University. The URL is [https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU\\_PV\\_REQ\\_ENTRY.GBL?PORTALPARAM\\_PTCNAV=EP\\_PV\\_REQ\\_ENTI](https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV_MAIN_MENU_PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTI). The page title is 'Create Requisition - Oracle'. The breadcrumb trail is 'Main Menu > eProcurement > Create Requisition'. The page content includes a 'Create Requisition' header, a 'Look Up Category' section with a note: 'Note: You may either Search or Browse to look up the appropriate category for your special request.', and a 'Browse Category Tree' section with a dropdown menu set to 'All Purchase Items'. A 'Return' button is located at the bottom left. On the right side, there is a 'Requisition Summary' box with the text: 'There are no lines on this request. Please add new line in order to save this requisition.' and a table showing 'Total Lines: 0' and 'Total Amount (USD): 0'. The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 2:25 PM.

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

When the folder opens click on the appropriate category. (Note: The folder for a category will not contain a +.) In this example, click “Mntc Building Equip New.”



# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

The Item Category assigns the account number to your requisition(account number will not be seen) and is used to route the requisition to a Buyer.

The screenshot displays the Oracle PeopleSoft Financials 9.1 'Create Requisition' web application. The browser window title is 'Create Requisition - Microsoft Internet Explorer provided by Towson University'. The address bar shows the URL: [https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?PORTALPARAM\\_PTCNAV=EP\\_PV\\_REQ\\_ENTI](https://fs91sp1.towson.edu/psp/FS91SP1/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?PORTALPARAM_PTCNAV=EP_PV_REQ_ENTI). The application interface includes a 'Browse Category Tree' on the left with a search bar and a list of categories. The 'Requisition Summary' box on the right displays the following information:

Requisition Summary	
There are no lines on this request. Please add new line in order to save this requisition.	
Total Lines:	0
Total Amount (USD):	0

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Fill in the “Unit of Measure” and the “Due Date.” Enter any Additional Information and click the boxes labeled, “Send to Vendor,” “Show at Receipt,” and “Show at Voucher.”

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

Catalog | Favorites | Territories | Forms | Web | Special Request

**Special Item**

\*Item Description: Commodity

\*Price: 500.00000

\*Quantity: 10.0000

\*Category: MNTC BLD EQUIP

Vendor ID: [ ]

Vendor Name: [ ]

Vendor Item ID: [ ]

Mfg ID: [ ]

Manufacturer: [ ]

Mfg Item ID: [ ]

\*Currency: USD

\*Unit of Measure: EA

Due Date: 10/21/2011

[Suggest New Vendor](#)

**Additional Information**

Demo additional information.

Send to Vendor     Show at Receipt     Show at Voucher

Request New Item

Add Item    Cancel    Add or Start New Type

**Requisition Summary**

There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0

Done

Start | 6 Microsoft Office Outlook | APPROVER AND REQU... | Document1 - Microsoft W... | Create Requisition - ... | Internet | 100% | 2:49 PM

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

If the vendor is in PeopleSoft, it can be found using the “Vendor Lookup.” If it is a new vendor, click the “Suggest New Vendor” link and enter at least a vendor name, contact and phone number. When you are done, click OK.

**ORACLE** Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

### Suggest a Vendor

Vendor Name:

Contact Name:

**Address Information**

Country:

Address 1:

Address 2:

Address 3:

City:

State:  Postal:

**Phone Information**

Phone Type:  Prefix:

Telephone:  Ext:

Comments:

**Requisition Summary**

There are no lines on this request.  
Please add new line in order to save this requisition.

Total Lines: 0  
Total Amount (USD): 0

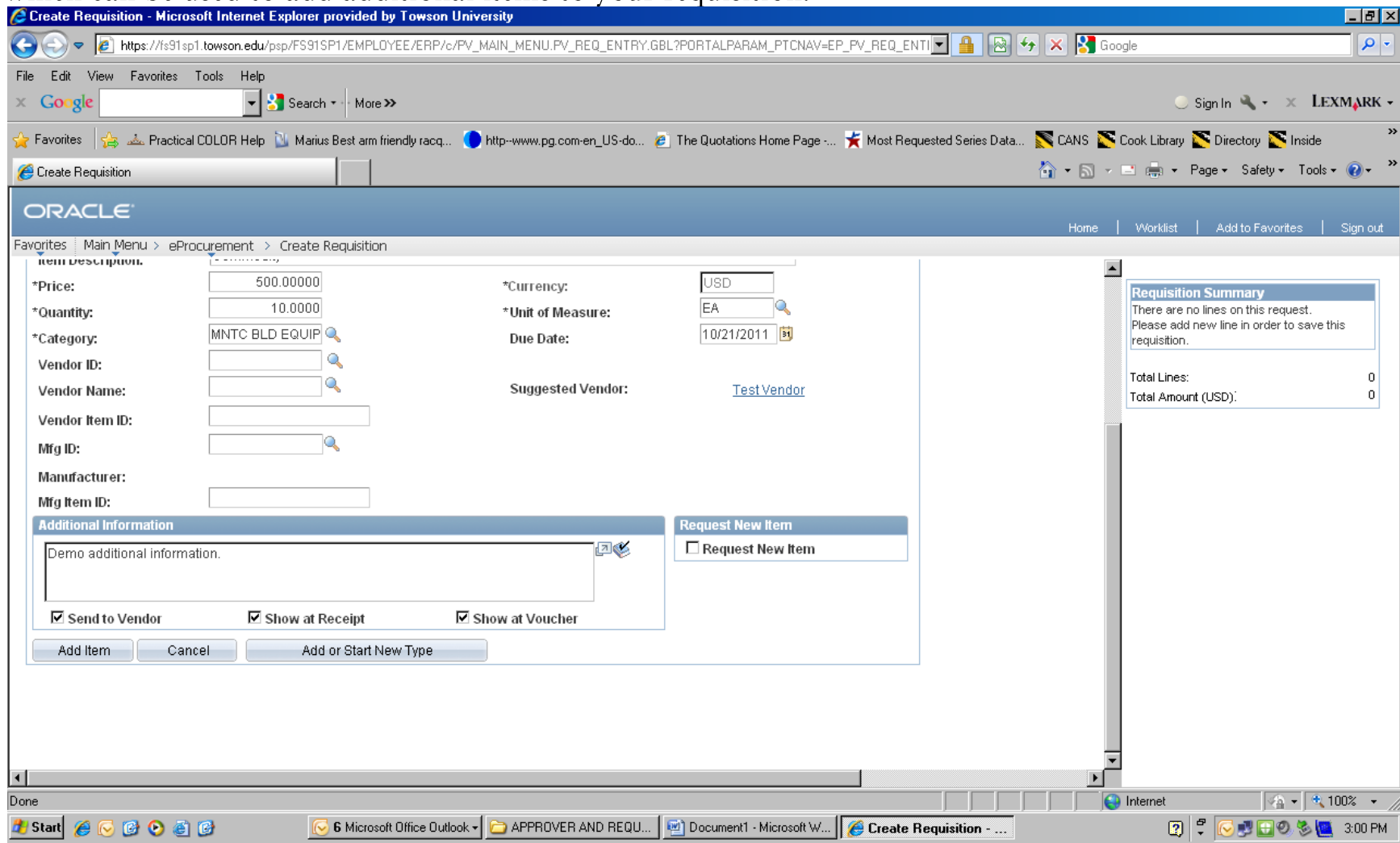
Done

Start | 6 Microsoft Office Outlook | APPROVER AND REQU... | Document1 - Microsoft W... | Create Requisition - ... | Internet | 100% | 2:52 PM

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Click the “Add Item” button to add the item to your requisition. A new blank entry screen will appear which can be used to add additional items to your requisition.



# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

When you are done adding items click “Review and Submit”.

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:  Search

Catalog | Favorites | Templates | Forms | Web | Special Request

**Special Item**

\*Item Description:

\*Price:  \*Currency:

\*Quantity:  \*Unit of Measure:

\*Category:  Due Date:

Vendor ID:  [Suggest New Vendor](#)

Vendor Name:

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

**Requisition Summary**

Description	Qty	UOM
Commodity	10	EA

Total Lines: 1  
Total Amount (USD): 5,000.00

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

The screen will show all of the items on your requisition. For this requisition, there is only one line item.

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

**Business Unit:** TOWSN Towson University  
**\*Requester:** LPERKIN Lynn E. Perkins  
**Requisition Name:** Commodity Traing Requisition  
**\*Currency:** USD  
**Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Commodity		10.0000	Each	500.00000	5,000.00

Total Amount: 5,000.00 USD

Comments

Send to Vendor  Show at Receipt  Shown at Voucher  Approval Justification

Check Budget

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

If you need to adjust accounting charges before you submit the requisition, click on the small triangle next to the requisition line.

**Requisition Name:** Commodity Traing Requisition **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Commodity		10.0000	Each	500.00000	5,000.00

Consolidate with other Reqs  Override Suggested Vendor

**Shipping Line:** 1 **Due Date:** 10/21/2011 **Quantity:** 10.0000 **Price:** 500.00000

**Status:** Active **Ship To:** CENTRRECV [Modify Onetime Address](#)

**Attention To:** Lynn E. Perkins

**Distribute By:** Qty **SpeedChart:** **Liquidate by:** Amt

Line	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	PROCUREMNT	10.0000	100.0000	5,000.00	TOWSN

**Total Amount:** 5,000.00 USD

**Requisition Summary**

Description	Qty	UOM
Commodity	10	EA

Total Lines: 1  
Total Amount (USD): 5,000.00

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

If you need to change the department on the requisition, click the tab labeled “Chartfields2.”

**Requisition Name:** Commodity Traing Requisition **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Commodity		10.0000	Each	500.00000	5,000.00

Consolidate with other Reqs  Override Suggested Vendor

**Shipping Line:** 1 **Due Date:** 10/21/2011 **Quantity:** 10.0000 **Price:** 500.00000  
**Status:** Active **\*Ship To:** CENTRRECV [Modify Onetime Address](#)  
**Attention To:** Lynn E. Perkins  
**\*Distribute By:** Qty **SpeedChart:** **\*Liquidate by:** Amt

**Accounting Lines**

Account	Fund	Dept	Initiative	Project	Affiliate	Fund Affiliate
611135	1000	18950				

**Requisition Summary**

Description	Qty	UOM
Commodity	10	EA

Total Lines: 1  
Total Amount (USD): 5,000.00

Total Amount: 5,000.00 USD

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

Enter any comments to your approver in the box labeled “Comments.” If you want to save your requisition without submitting it for approval, click “Save and Preview Approvals.” If you would like to submit the requisition for approval, click “Save and Submit.”

**Requisition Summary**

Description	Qty	UOM
Commodity	10	EA
Total Lines:		1
Total Amount (USD):		5,000.00

# Updated Job Aid for Requesters PeopleSoft Financials 9.1

## Entering a Commodity Requisition

When you click “Save and Submit,” this screen will appear telling you where the requisition has been submitted for approval. Once the requisition has been approved and successfully budget checked, it will be forwarded to the appropriate Buyer for action.

**Confirmation**

Requested For: Lynn E. Perkins      Number of Lines: 1  
Requisition Name: Commodity Traing Requisition      Total Amount: 5,000.00 USD  
Requisition ID: 0000003250  
Business Unit: TOWSN  
Status: Pending  
Priority: Medium  
Budget Status: Not Checked

**Fiscal Approval**

Commodity Traing Requisition: Pending    Start New Path

2

Pending  
Lucy L. Slach  
Department Managers

**Requisition Summary**

Description	Qty	UOM
Commodity	10	EA

Total Lines: 1  
Total Amount (USD): 5,000.00