Requisitioning
Course Objectives

By the end of this course, you should be able to:

• Create Requisitions
• Manage Requisitions
• Receive Goods and Services at the Desktop
• Return Goods to a Vendor
• View PO Activity Information
Requisitioning
Introduction
Requisitioning Now and The Future...

<table>
<thead>
<tr>
<th>Now…</th>
<th>The Future…</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Significant number of one off purchases for indirect goods and services</td>
<td>• A standardized system within and across campuses supported by a highly efficient workflow</td>
</tr>
<tr>
<td>• Multiple ways to order goods and services with limited controls, for example, overreliance on blanket orders</td>
<td>• Effective, value added processes</td>
</tr>
<tr>
<td>• Inconsistent workflow, paper based controls</td>
<td>• Full automation from requisition to payment</td>
</tr>
<tr>
<td>• Insufficient supplier spend information due to multiple disparate systems</td>
<td>• Enhanced visibility on spend</td>
</tr>
<tr>
<td>• Multiple exceptions to invoice reconciliation</td>
<td>• Improved integrity of data and access through rich reporting</td>
</tr>
<tr>
<td>• Overutilization of the P-Card</td>
<td>• Three-way matching for all purchases prior to payment</td>
</tr>
<tr>
<td></td>
<td>• Limited use of blanket orders</td>
</tr>
<tr>
<td></td>
<td>• Policy enforcement on use of P-Card</td>
</tr>
</tbody>
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## The Requisition Lifecycle

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Lesson 1
Creating Requisitions
Lesson Objectives

By the end of this lesson, you should be able to:

• Explain the Requisition Creation Process
• Create a Requisition using a Catalog
• Create a Requisition using Favorites
• Create a Requisition using a Template
• Create a Requisition using a Punch Out
• Create a Requisition based on Special Requests
# The Requisition Lifecycle

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Requisition Creation Steps

Create Requisition

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

Specify details, such as:
- Requisition Name
- Business Unit
- Priority

Add Items/Services to the Requisition
- Specify items and their quantities
- Calculate total cost of the Requisition

Review the details of your Requisition
- Make any necessary changes
- Submit the Requisition for approval
Business Units

- Business Units are operational subsets of Jefferson that enable you to plan operations based on the way that Jefferson functions.
- The Purchasing Business Units include:

<table>
<thead>
<tr>
<th>Entity</th>
<th>Purchasing Business Unit</th>
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<tbody>
<tr>
<td>University</td>
<td>TJU</td>
</tr>
<tr>
<td>Jefferson University Physicians</td>
<td>JUP</td>
</tr>
<tr>
<td>Center City Hospitals</td>
<td>TJH</td>
</tr>
<tr>
<td>Methodist</td>
<td>MHD</td>
</tr>
</tbody>
</table>

- Some users will be able to requisition across business units (For example, a Hospital employee may be able to requisition for a University Business Unit).
- Some requisitioners can requisition for other requisitioners.
Step 1: Defining the Requisition

- The Requisition Name is a free-form field for your benefit
- There are no set naming conventions for naming a Requisition
- The Requisition ID is the unique identifier for the Requisition, the system does not use the name
- Pick a name that is descriptive and meaningful to you
- Requisition name is not required
- Requisitioners able to requisition for others have a lookup on the Requester field

Create Requisition

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

Business Unit: TJH  Thomas Jefferson Hospital
Requester: qxb003  Butt, Gloria
Requisition Name: Sample Requisition

Line Defaults

Continue
Step 2: Adding Items and Services

There are 5* methods available for adding items and/or services to a requisition:

- Catalog Item
- Favorites
- Templates
- Web (Punch Out)
- Special Request

* Jefferson is not using the Forms method at this point in time.
Step 3: Reviewing and Submitting

- If the vendor was called and the order was phoned in, you will need to click on Bypass Dispatch to override the Vendor Dispatch Method.
- If you need to change the shipping method from the default, you can do it on this page as well by clicking the check box and entering the appropriate shipping method.
- You can also add Favorites and Personal Templates from the screen.
- This screen also allows you to preview approvers.
Adding Accounts & Departments

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: TJH - Thomas Jefferson Hospitals
*Requester: re_train60
Requisition Name: Weekly Order

Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>6420-01-01 PENTOTHAL MIX PLUS</td>
<td>ABBOTT VASCULAR</td>
<td>4.0000</td>
<td>Cassette</td>
<td>80.00000</td>
<td>320.00</td>
</tr>
</tbody>
</table>

Shipping Line: 1
Due Date: 1PAV010100
Status: Active
*Ship To: Requisitioning Training ID 60

Accounting Lines

<table>
<thead>
<tr>
<th>Account</th>
<th>Dept</th>
</tr>
</thead>
<tbody>
<tr>
<td>6403</td>
<td>61019</td>
</tr>
<tr>
<td>F441</td>
<td>04030</td>
</tr>
</tbody>
</table>
Splitting Costs

- You can split charges by changing the quantity or the percent
- Changing either field will update the other field when you click out
PeopleSoft Training Environment

To ensure everyone is using the correct version of Internet Explorer, and to avoid typing out the entire PeopleSoft link, you will access the environment directly through Citrix:

1. On the computer’s homepage (TJUH intranet) click the Citrix logo:
PeopleSoft Training Environment

2: Instruct participants to log-in using the computers **PCS code** (written on the computer) and the password: **123456**

*Tip: *If someone has trouble with their PCS#, have them use their campus key*
PeopleSoft Training Environment

3: Click on **SCM Training**. It will bring you directly to the PeopleSoft log-in page.

If you receive a “profile error” when you click on the link, just click again.
PeopleSoft Training Environment

Trainee Log-in:

• Login: re_train(your number)
• Password: train#123
Using a Catalog

• Use a Catalog to select specific items from the Item Master
• You can select from a catalog by:
  1. Searching the catalog for an item
  2. Using the expandable category list to find and select items
Search Catalog

You can also use the fields under **Search Catalog** to help locate a specific item.

Search options include:

- Description
- Manufacturer
- Manufacturer’s Item ID
- Vendor
- UPN ID

Manufacturer's Item ID and UPN ID are recommended search fields to use, as the information from your old system should match.
Create Requisition – Catalog Item Demo

Create a Requisition Using a Catalog Item

<p>| | |</p>
<table>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter Requisition Information</td>
</tr>
<tr>
<td>2.</td>
<td>Select a Catalog</td>
</tr>
<tr>
<td>3.</td>
<td>Add an Item from the Catalog to the Requisition</td>
</tr>
<tr>
<td>4.</td>
<td>Save and Submit</td>
</tr>
</tbody>
</table>
Create a Requisition Using a Catalog Item

1. Enter Requisition Information
2. Select a Catalog
3. Add an Item from the Catalog to the Requisition
4. Save and Submit
Adding Favorites

- You can add items that you find in the catalog as Favorites
  - Search the catalog for an item
  - Check the items you want to add as Favorites
  - Click the Add to Favorites button
- You can also add items from the Review and Submit screen
Using Favorites

1. Check the item you wish to select
2. Click the Add button

You can select from items you have marked as your favorite
1. Check the item you wish to select
2. Click the Add button
Create Requisition – Favorites Demo

Create a Requisition Using Favorites

1. Enter Requisition Information
2. Add an Item from your Favorites to the Requisition
3. Save and Submit
Create Requisition – Favorites Exercise

<table>
<thead>
<tr>
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<tr>
<td>1. Enter Requisition Information</td>
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Using Personal Templates

Templates are groups of specific items. You can use templates to easily requisition several items at once.

Some departmental templates may have been created for you and may appear on your Templates tab.
Creating a Personal Template

- Once you have added items, you can designate those items as a Personal Template
- Check the items and click the Add to Template(s) button on the Review and Submit screen
## Create Requisition – Templates Demo

### Create a Requisition Using Templates

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<td>1.</td>
<td>Enter Requisition Information</td>
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<td>2.</td>
<td>Add an Item Template to the Requisition</td>
</tr>
<tr>
<td>3.</td>
<td>Save and Submit</td>
</tr>
</tbody>
</table>

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[Jefferson University and Hospitals logo]

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Create Requisition – Templates Exercise

Create a Requisition Using Templates

1. Enter Requisition Information
2. Add an Item Template to the Requisition
3. Save and Submit
Using Punch Outs

- The Web tab of the Add Items and Services screen contains a list of vendors.
- You can click on the name or logo of the vendor and “Punch Out” to that vendor’s website within PeopleSoft.
Using Punch Outs

- You can then browse the vendor’s site from within PeopleSoft and create an order as if you were on that site directly.
- When you checkout, your order will be added to the Requisition.
Create Requisition – Punch Out Demo

Create a Requisition Using a Punch Out

<p>| | |</p>
<table>
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<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Enter Requisition Information</td>
</tr>
<tr>
<td>2.</td>
<td>Go to a Vendor’s Site</td>
</tr>
<tr>
<td>3.</td>
<td>Create an Order on the Vendor’s Site</td>
</tr>
<tr>
<td>4.</td>
<td>Save and Submit</td>
</tr>
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</table>
Create Requisition – Punch Out Exercise

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<td>4. Save and Submit</td>
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</table>
Special Requests

For instances where you can’t find an item in the Catalog nor on a supplier’s website, or when you want to request a Capital Item, you will use the Special Request tab.

Select the Special Item link

<table>
<thead>
<tr>
<th>Select a Request Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Item</td>
<td>Request an item that is not listed in the Catalog.</td>
</tr>
<tr>
<td>Fixed Cost Service</td>
<td>Request a one-time service for a flat fee.</td>
</tr>
<tr>
<td>Variable Cost Service</td>
<td>Request a service for which the fee is based on the time worked.</td>
</tr>
<tr>
<td>Time and Materials</td>
<td>Request a service for which the fee is based on the time worked and materials used.</td>
</tr>
</tbody>
</table>
Special Requests

You will need to enter details for the special item before you can progress to the Review and Submit stage. Required fields include: Item Description, Price, Quantity, Category, and Unit of Measure.

For Capital and Capital Biomed requests you will also be required to enter the GL Business Unit, Asset Profile ID and the CAP #.
Create Requisition – Special Request Demo

Create a Requisition for a Special Request

1. Enter Requisition Information
2. Enter the Details for a Special Item
3. Enter the Bypass Dispatch and Shipping Information
4. Save and Submit
Create Requisition – Special Request Exercise

<table>
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<tbody>
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<td>3. Enter the Bypass Dispatch and Shipping Information</td>
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Requisition Approval

- All requisitions will be submitted for approval, including Punch Outs
- An Approver will receive a notification when you create a Requisition
- The approver will review the Requisition, and may add Ad-Hoc Approvers and/or Reviewers, as well as comments
- The Approver may take one of three actions:
  - Approve
  - Deny
  - Hold
Special Cases

Some requisitions may create an automatic approval routing based on their contents or quantities:

<table>
<thead>
<tr>
<th>If the Request Contains…</th>
<th>Then…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Assets</td>
<td>The Requisition will automatically be routed to the Capital Committee for Approval</td>
</tr>
<tr>
<td>Radioactive Materials</td>
<td>The Requisition will automatically be routed to Radiation Safety for Approval</td>
</tr>
<tr>
<td>Biomedical Products</td>
<td>The Requisition will automatically be routed to Biomedical for Approval</td>
</tr>
<tr>
<td>Grant Purchases</td>
<td>The Requisition will automatically be routed to the Grant Approvals Group for Approval</td>
</tr>
<tr>
<td>Amounts that are Over the Established Spending Limit*</td>
<td>The Requisition will be required to be Approved at the Departmental level</td>
</tr>
</tbody>
</table>

* Standardized spending limits will be enforced by policy and the system
Let’s Discuss

Consider the following questions…

FOR DISCUSSION:
1. Which way would you prefer to create a requisition?
2. What are some special cases that would cause your requisition to be routed to a specific party for approval?
Check Your Understanding

Let’s review what we just discussed.

Answer the following:

1. What are the three steps involved in creating a Requisition?
   - Define Requisition, Add Items or Services, Review and Submit

2. What are the five ways you can add items to a Requisition?
   - Catalog, Favorites, Template, Punch Out, Special Request

3. What are some examples of information that you need to specify when you make Special Requests?
   - Unit of Measure, Item Description, Category, Vendor, Manufacturer, Price, Quantity
Lesson Summary

You should now be able to:

• Explain the Requisition Creation Process
• Create a Requisition using a Catalog
• Create a Requisition using Favorites
• Create a Requisition using a Template
• Create a Requisition using a Punch Out
• Create a Requisition based on Special Requests
Lesson 2
Managing Requisitions
Lesson Objectives

By the end of this lesson, you should be able to:

• Navigate to a Previously-Created Requisition
• Review Requisition Details
• Take an Action on a Requisition
• Monitor Approval Status
Navigating to Requisitions

• You can review requisitions by navigating to **eProcurement > Manage Requisitions**
• The Search Requisitions section of the screen allows you to specify search terms to narrow down the Requisitions you see at the bottom of the screen
Reviewing Requisitions

• Expanding any Requisition listed in the Search Results will display the Requisition Lifecycle

• You can tell where the Requisition is in the process by the active links in the Requisition Lifecycle, for example, the Requisition below is in the Approvals stage, since the Requisition and Approvals links are the only live links in the Requisition Lifecycle
Requisition Details

- You can click the Requisition link to see details about the requisition.
- You can review the basic Requisition details, as well as the Requisition schedule and distribution.
Available Actions

• You can also take an Action on a specific Requisition, including:
  o **Cancel Requisition:** Cancels the Requisition
  o **Copy Requisition:** Creates another Requisition based on the one you specified
  o **Edit Requisition:** Perform activities such as adding comments and modifying shipping information for open Requisitions
  o **Requisition Cycle:** Displays the Requisition Lifecycle for the Requisition
  o **View Approvals:** Displays the Approval Pathway for the Requisition
  o **View Printable Version:** Opens a new window with Requisition information in printable form

This drop-down will change depending on the status of the Requisition
Cancel Requisition

- The cancellation screen shows the relevant Requisition details.
- This screen acts as a confirmation screen, allowing you to review the Requisition one last time before you cancel it.
- You cannot cancel a Requisition after it has been dispatched.

![Requisition Details](image)
Copying Requisitions

• Selecting this option will take you directly to the Review and Submit stage of the newly-copied Requisition.
Edit Requisition

- Editing a Requisition may cause the approvals to reinitiate and may cause an update to the Purchase Order
- If the Purchase Order has been dispatched to vendor, it may cause a Change Order to the Purchase Order
- Editing a Requisition will require an additional approval by the Purchasing department
Monitoring Approvals

- You can click the Approvals icon in the Requisition Lifecycle to view the Approval Pathway.
- The Approval Pathway allows you to see who has or has not yet reviewed the Requisition and the action(s) they have taken.
# Manage Requisitions Demo

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<td>1. Navigate to the Manage Requisitions screen</td>
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<td>2. Take a few actions on the Requisitions</td>
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<td>3. Review Approver information</td>
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Lesson Summary

You should now be able to:

- Navigate to a Previously-Created Requisition
- Review Requisition Details
- Take an Action on a Requisition
- Monitor Approval Status
Let’s take a short break.
Please return to your seats and be ready to begin in 15 minutes.
Lesson 3
Receiving Goods and Services at the Desktop
Lesson Objectives

By the end of this lesson, you should be able to:

• Receive Goods and Services at the Desktop
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Receiving

- Going forward, receiving will be handled in two different ways
  - Jefferson now has a standard process for receiving inventory at the dock
  - In cases where goods come directly to the Requisitioner (desktop receiving), the Requisitioner will be required to create a notification in the system that goods were received
- Desktop receiving is an exception to the normal process of receiving goods at the dock
- Goods received at the dock will require the dock to enter the receipt
- Before you can receive goods at your desk, you need to send justification to the Purchasing department and the department needs to create a Ship To
- **Invoices will not be paid until a receipt is submitted**
The Desktop Receiving Process

- Look up and review the Purchase Order
- Make any changes necessary to the Receipt Lines and Save
Receive Goods at the Desktop Demo

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1. Find the Purchase Order associated with the Item</td>
</tr>
<tr>
<td>2. Mark the Item as Received</td>
</tr>
</tbody>
</table>
Lesson Summary

You should now be able to:

• Receive Goods and Services at the Desktop
Lesson 4
Returning Goods to a Vendor
Lesson Objectives

By the end of this lesson, you should be able to:

• Return Goods to a Vendor
## The Requisition Lifecycle

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<tr>
<td>Receiving</td>
<td>Requisitioner, Receiver</td>
<td>Receive the goods at the loading dock (Receiver) or at the desktop (Requisitioner).</td>
</tr>
<tr>
<td><strong>Returns</strong></td>
<td>Requisitioner, Receiver</td>
<td>Return goods to a Vendor.</td>
</tr>
<tr>
<td>Invoice</td>
<td>Accounts Payable</td>
<td>Draft a Voucher for payment.</td>
</tr>
<tr>
<td>Payment</td>
<td>Accounts Payable</td>
<td>Pay the Vendor.</td>
</tr>
</tbody>
</table>
Returning Goods to a Vendor (RTV)

When you identify an item that needs to be returned, you will first locate the Purchase Order ID and contact the vendor to acquire a Return Material Authorization (RMA) number.

If the item was received at the dock you then have the option to contact Inventory with the RMA# and have them create and perform the Return to Vendor (RTV) for you. If preferred, you may perform the return yourself.
## Return Goods to a Vendor Demo

<table>
<thead>
<tr>
<th>Return Goods to a Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Select the Receipt</td>
</tr>
<tr>
<td>2. Enter RTV information</td>
</tr>
</tbody>
</table>
Lesson Summary

You should now be able to:

• Return Goods to a Vendor
Lesson 5
Run a Purchase Order Activity Summary
Lesson Objectives

By the end of this lesson, you should be able to:

• Run a Purchase Order Activity Summary
The Purchase Order Activity Summary

- This Inquiry enables you to see:
  - Item details
  - Receipt data
  - Invoice information
  - Matching data
  - RTV information

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Item Description</th>
<th>UOM</th>
<th>Order Qty</th>
<th>Amount Ordered</th>
<th>Currency</th>
<th>Amount Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>cat scan</td>
<td>EA</td>
<td>1.0000</td>
<td>10,000.000</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>
Inquire into Purchase Orders Demo

<table>
<thead>
<tr>
<th>Inquire into Purchase Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Run the Purchase Order Activity Summary</td>
</tr>
</tbody>
</table>
Inquire into Purchase Orders Exercise

Inquire into Purchase Orders

1. Run the Purchase Order Activity Summary
Lesson Summary

You should now be able to:

• Run a Purchase Order Activity Summary
Requisitioning Wrap-Up
Wrap-Up

Keep in mind:

• You can create a Requisition via Catalog, Template, Favorites, Punch Out, or Special Request
• Once you create a Requisition, you can track it throughout its lifecycle
• If you receive goods at the desktop, you will need to mark them received in the system
• Invoices will not be paid until a receipt is submitted
• You need to have the PO ID and RMA Number to create a Return to Vendor
• The PO Activity Summary is a useful Inquiry that allows you to view item details, receipt data, invoice information, matching data, and RTV information
Course Summary

You should now be able to:

• Create Requisitions
• Manage Requisitions
• Receive Goods and Services at the Desktop
• Return Goods to Vendor
• View PO Activity Information