COR452 Introduction to E-Procurement Manual
Table of Contents

COR452 Introduction to E-Procurement Manual ................................................................. 1
Table of Contents .................................................................................................................. 2
History .................................................................................................................................... 3
e-Procurement Introduction ................................................................................................. 4
Overview ................................................................................................................................ 4
Create an e-Procurement Requisition .................................................................................. 5
e-Procurement Requisition .................................................................................................... 6
  Step 1 – Define Requestion .................................................................................................. 6
  Step 2 – Add Item and Services ......................................................................................... 9
  Step 3 – Review and Submit .............................................................................................. 17
eProcurement Requisition-Order by Description ................................................................. 25
  Step 1 – Define Requestion .............................................................................................. 25
  Step 2 – Add Item and Services ......................................................................................... 26
  Step 3 – Review and Submit .............................................................................................. 32
  Fix a Denied E-Procurement Requisition .......................................................................... 41
Creating a PO from an E-Procurement Requisition (CPO / Buyer function) ......................... 44
  Step 1 – Expedite Requisition .......................................................................................... 44
  Step 2 – Verifying the PO creation .................................................................................... 47
## History

<table>
<thead>
<tr>
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</thead>
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e-Procurement Introduction

Overview

PeopleSoft eProcurement is designed to make it easier for a casual user to requisition items. This ease-of-use method helps reduce out-of-system purchasing; also known as maverick purchasing. PeopleSoft eProcurement helps enforce contract purchasing as well as capture spending information for future analysis. In addition, by improving ease-of-use, employee training is simplified, reducing the total-cost-of-ownership.

Reference People Books

NOTE: Throughout this training manual, you will be asked to click, or while entering information. It is important to remember that just accepts the information on a sub-page and returns you to the main page. It does not save the information if you exit the transaction. Only actually saves the information you have entered. Updates the display to incorporate the information and defaults you have entered.
Create an e-Procurement Requisition

The major steps in creating an ePro Requisition are:

1. Define Requisition
2. Add Items and Services
3. Review and Submit
4. Approve Requisition-Work Flow
5. Budget Check the Requisition
6. Edit Requisitions
7. Source/Copy Requisition to Purchase Order.
e-Procurement Requisition

Step 1 – Define Requestion

To create a Requisition, navigate as follows:

Navigation: E-procurement > Requisition

This is called the Requisition Home Page

Click the Requisition Settings next to the symbol to access the Requisition Header Page.
**Requester**

Enter the name of the person requesting these materials or services. This can be the name that defaults or you can purchase on behalf of another person. To purchase on behalf of another user, these requesters must be defined on the User Preferences page.

**Priority**

Default is Medium. Choices are High Medium and Low.

**Requisition Name**

(Optional) Enter a description of the request to help you identify this requisition as it flows through the system. The request can also be tracked using the requisition ID assigned when it is saved. If no name is entered, the requisition number will default into this field.
Requisition Default

The fields that you enter on this page apply to the entire requisition. You can override these values on the requisition line or at the shipment or distribution level. Default values that appear in these fields come from the item definition—according to the item default hierarchy in PeopleSoft eProcurement and Purchasing. When no predefined values exist, the data you enter in the line defaults section replaces blank fields as defaults.

**Supplier**
Select the supplier from the items on this requisition. This overrides the default supplier ID. The default location for the selected supplier appears to the right of the Supplier field. You can select a different location. However, use caution when changing the supplier location. Purchase orders are not sent to marketplace unless the supplier ID and supplier location match those values defined on the Linked Supplier Setup page. To access the page, select eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers.

**Supplier Location**
View the location of the supplier. The default is based on the value that is defined for the supplier.

**Buyer**
Select a buyer for this requisition. At the requisition line level, the system uses the buyer from the item definition or item supplier.

**Category**
Define a default category for this requisition.

**Unit of Measure**
Define the unit of measure for use on this requisition.

**Ship To**
The standard address to which most of the requisition is delivered. 

[Add One Time Address link]
Click to access the Shipping Address page, where you can enter a shipping address that is not in the standard ship to location codes.

**Due Date**
The standard date you wish to receive the items on this requisition.

**Attention**
Enter the person from who you want to receive notification about this shipment. The system includes this field value on outbound purchase orders to the Marketplace.

**Accounting Defaults**
Enter ChartField and asset management information.

Click [OK].

### Step 2 – Add Item and Services

The basic Search function can be used for simple searches. The choices to search are listed in the dropdown.

These same choices are listed on the left side of the Create Requistion page with more detail.
Choose the Advanced Search link for more search options.
Use this page to find items for a new or existing requisition. You can search for items to include in a requisition by:

Using the Search field to enter key words or phrases for a search.

This search looks for items in catalogs, favorites list, templates, services, forms, and the web and displays the results of the search in collapsible grids.

Browsing catalogs.

This search method defines which catalogs the system uses when checking for an item. Using a category path, you can further define catalog categories.

Searching catalogs for item attributes such as manufacturer, item ID or supplier name, and price ranges.

Enter a value to search on from the item description. The system searches all catalogs for items that match the criteria that you enter. Other fields defined for the item, such as, supplier name, manufacturer name, item ID, manufacturer ID, supplier ID, supplier item ID, or manufacturer item ID can also be searched from here depending on the set up of the system. Use any combination of letters, numbers, and spaces. The field is not case-sensitive. Don’t use quotation marks, Boolean search qualifiers, wild cards, punctuation marks (except for the apostrophe), or special characters, such as %, |, ^, @, $, (, and ).

After you enter search criteria, click the Search button to complete the search.
To select a catalog click on the particular Catalog link located under the catalog field on the left of the Create Requisition page. There are several catalogs to choose. In our example we will choose the Computer Equipment catalog.

Once you have selected a catalog you can drill down to search for an Item by clicking the Category Path links to drill down to the items.

And so on…. Until the link is grayed out.
You can select the item by clicking the box located to the left of the item description.
**Item Description**

Click the item's description to access the Item Description page where you can view details about the item.

**Supplier**

Displays the name of the supplier who supplies this item. The system uses the supplier's default location. You can change to another location with the Requisition Defaults page. If more than one supplier supplies the same item, you might see multiple rows for the item. To view more than one supplier, you must have the eProcurement VIEW_ALL_SUPPLIERS role action.

**Preferred Supplier**

Appears next to any row with a preferred supplier in the Supplier Name column.

**Add Selected To**

Click to add multiple items to cart, compare, favorites or templates. When you click the button, the system adds items to the requisition that has a check mark in its corresponding check box. Items with a defined quantity are added to the requisition. If you are using the PeopleSoft eProcurement role action of NOVICEREQSTR, then you are automatically taken to the Review and Submit page.

**Add to Favorites**

Click to add the selected item to the favorites.

**Compare**

To compare two items side-by-side, select the check boxes to the left of the item descriptions and click the compare link (Compare). This enables you to compare the item results with other items from the selected category that share the same attributes.

This section displays the preferred supplier and supplier/Item Price.
Input Quantity in the box provided.

You can review this Item’s Contract by clicking on the Contract link, which will be visible on items under contract.

Example:

You can review the contract by clicking on the contract number.

If there are additional UOM that are available on the Item ID there will be a magnifying glass located to the right of the UOM Field.

Click the Return button.
Click the **Add** button next to the quantity field or if you are done to add your item to the Cart and when you are done adding your items to the Cart then **click the Checkout** button at the top of the page to go to the Checkout - Review and Submit Page.
Step 3 – Review and Submit

Review and Submit Page

Line
Displays the line number for this requisition item.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Apple Mac Core 2 Duo 2.5GHz 2</td>
<td>DSS_DESKTOP_MAC</td>
<td>Midtown Computer Supplies</td>
<td>4.0000</td>
<td>Each</td>
<td>1798.00</td>
</tr>
</tbody>
</table>

Expand Selection
Displays information that pertains to this specific line.

Description
Click the item’s description to view the Item Description page for more information about the item.

Supplier Name
Displays the name of the supplier who supplies this item.

Quantity
Displays the units of this requisition item that you are ordering. You can change the value.

UOM
The ordering unit of measure for this item.

Price
Displays the price per unit.

Sole Source
Click and select the type of Sole Source this purchase is on. This can also be used to note if this purchase was exempt from the StateWide Contract. Be sure to attach all required document to the comment.

Line Details
Click to access the Line Details page, where you can modify additional details on the line, such as the buyer, supplier, and other line specific information.

Total Amount
Displays the extended price for this requisition line, which is calculated by multiplying the unit price by the quantity that you order.
Add to Favorites

To add any items on this requisition to the favorite's list, select one or more items using the check box to the left of the item description and click this link. A message displays confirming that the item has been added to the favorites list. You do not need to save the requisition to add favorites.

Modify Line/Shipping/Accounting

Click to access the Add One Time Address/Accounting page, where you can change the shipping location, delivery date, quantity in the shipment, and so on. You can also change the accounting information for this requisition line. The Shipping can be changed for all lines by clicking Edit for All Lines link on main page.

Delete

Click to delete selected items from this requisition. You select items using the check box to the left of the item description.

Justification/Comments

(Optional) Enter an explanation for this requisition. The buyer can view this field, and it appears on the internal copy of the purchase order. It also appears on the workflow approval pages for the approver. The supplier’s copy of the purchase order does not include the justification.

Send to Supplier

Select if you want comments to appear on POs dispatched to suppliers. If the comments are for internal use only, leave the check box clear. The Send to Supplier check box applies to comments in the comment text box only, not to the documents that you attach using the associated document fields.

Show at Receipt

Select if you want comments to appear on the receipt documents.

Show at Voucher

Select if you want comments to appear on the vouchers.

Add to Templates

Select this hyperlink to add requisition to your template(s). The system creates the template when you save the requisition.

Save & submit

Click to save the requisition and submit it for approval, sourcing, and dispatching to a supplier. It remains editable while the status is Open or Pending. When you click this button, the system displays the Confirmation page to inform you that the request has been successfully saved and provide summarized information about the request including the requisition ID and total price.

Save for Later

Click to Save the Requisition without submitting
Add More Items
Will return you to the order page to continue adding items.

Preview Approvals
Click to access the page where you can view the approvers prior to submitting the requisition for approvals.

Note: Save for Later & preview approvals does NOT initiate the approval process. The requisition is not submitted until then submit button is selected.

Cancel Requisition
Click to cancel the entire requisition. The system displays a warning message before the cancellation.

Find More Items
Click to access the Catalog page where you can browse and search for additional items

Cancel Changes
This button is only active if you have saved the requisition, and have edited it to make changes. Click the Cancel Changes button to revert to the last previously saved version.

Click the Expand Icon located to the left of the line to review and update the Ship To and distribution lines.

Unit Price: You can overwrite the Unit Price. If the unit price is overwritten then you must be sure to de-select “Calculate Price”. (If on a contract Calculate Price cannot be deselected.)

Line Details: Click to access the Line Details page, where you can modify additional details on the line, such as the buyer, supplier, RFQ Required if it has to go out for Bid and other line specific information
**Line Details**

<table>
<thead>
<tr>
<th>Line</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple iMac Core 2 Duo 2.5GHz 2</td>
<td></td>
</tr>
</tbody>
</table>

**Item Details**

<table>
<thead>
<tr>
<th>Merchandise Amount</th>
<th>7192.00 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item ID</td>
<td>DESKTOP_MAC</td>
</tr>
<tr>
<td>Category</td>
<td>DESKTOPS</td>
</tr>
<tr>
<td>Original Substituted Item</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Physical Nature</td>
<td>Goods</td>
</tr>
<tr>
<td>Buyer</td>
<td>CROTH</td>
</tr>
</tbody>
</table>

**Contract Information**

- Use Contract if Available

**Supplier Information**

<table>
<thead>
<tr>
<th>Supplier ID</th>
<th>USA08090310</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Location</td>
<td>HQ Main</td>
</tr>
<tr>
<td>Supplier Item ID</td>
<td></td>
</tr>
<tr>
<td>Supplier's Catalog</td>
<td></td>
</tr>
</tbody>
</table>

**Manufacturer Information**

<table>
<thead>
<tr>
<th>Manufacturer ID</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer</td>
<td></td>
</tr>
<tr>
<td>Manufacturer's Item ID</td>
<td></td>
</tr>
<tr>
<td>GTIN</td>
<td></td>
</tr>
</tbody>
</table>

**Sourcing Controls**

- Consolidate with other Req
- Calculate Price
- Override Suggested Supplier

Click [OK] to return to the previous page.
• Update Ship To
• Update Due Date
• Update Chartfields-Chartfields can default from Requester setup. Must have an Item ID.
• Update Asset Profile by clicking on the Asset Information tab.
• Clicking , located at the far right, allows you to add additional schedule’s Lines (multiple Ship To’s/Due Date)
• Clicking , located at the far right, allows you to add additional Distribution lines (multiple chartfields)

Add to Template(s)

Select all lines on your requisition and click the hyperlink located under the last line of your requisition to create a template.

Enter a description for your Template

Add a new template

Click OK
Save & submit

Click **Save & submit** to save the requisition and submit it for approval, sourcing, and dispatching to a supplier. It remains editable while the status is *Open* or *Pending*. When you click this button, the system displays the Confirmation page to inform you that the request has been successfully saved and provide summarized information about the request including the requisition ID and total price.

Save & preview approvals

Click to access the Confirmation page where you can view requisition details and approvers.

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**NOTE:** The approval monitor may not reflect the most current approver status until the requisition is actually saved and submitted.

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Cancel Requisition

Click to cancel the entire requisition. The system displays a warning message before the cancellation.
Click the hyperlink at the bottom of the page.

Click the button to return to your requisition and click the button.
When the approvers box states Pending, Workflow has kicked off and will be in the approver’s Workflow.

The above screenshot reflects the current ISD workflow. Once Agencies have decided what steps are in their process, their workflow could look different.
eProcurement Requisition-Order by Description

Step 1 – Define Request

To create a Requisition, navigate as follows:

*Navigation: eProcurement > Requisition*

Click the Requisition Settings link next to the icon. This is called the Requisition Header.

Leave the Default Requestor “Your Name” or enter the name of the person you are requesting on behalf of.
Input an Origin
Requisition Name
Select a Priority.

Click the **OK** button.
Step 2 – Add Item and Services

Click on the Special Requests link on the left side of the Create Requisition page. This page is used to define what type of special request to create.
The **Special Requests** page is displayed. This page is used to order an Item by category code and not Item ID.

**Input the following Required Data:**
- Item Description
- Price
- Quantity
- *Category Code. The category code can be inputted directly or looked up by clicking on the hour glass icon. See example next page.

**Input the following Optional Data if needed:**
- Supplier ID
- Supplier Item ID
- MFG ID
Click the Search button if needed. IF you already know that category code you do not need to click the Search button.

Clicking the look up icon, , will return the screen below.

Input a description and click the button.
The Categories that are marked as Non-Catalog will not be available to select. Click on the appropriate Category code to select.
Click Add to Cart.
The **Special Requests** page reappears for you to add your next item.

Click the **Checkout** button when you are finished adding items.
Step 3 – Review and Submit

Review and Submit Page

To view or add additional comments or attach a file click on the Comment Icon located on the right of the Line on the Review and Submit page, under Comments. If no comments have been added, the Comment Icon will be blank.
To add a comment section click the located to the right of the comment section and add a comment.

To add a comment, click in the comment section.
To attach a file click the **Add Attachments** button.

Click the **Browse...** button.
Double click on the file to select. You can load PDF, Excel and Word Documents.

Click the **Upload** button.
You can load additional documents by clicking the **Add Attachments** button. Click the **OK** button.
To update the Ship To and Funding **click** on the Expand Bar ▶ to the left of the line.
After the ship to, Location and funding is updated click on the link to preview your requisition’s workflow path. Click to send the requisition into the workflow path.
If the purchase is an IT Asset and is over $500.00 a message will be received if an Asset BU and Profile ID have not been assigned.

Click on the **Asset Information** tab.

Input an AM Business Unit and Profile ID.

Click **Preview Approvals** link.
If the requisition is for an IT asset or Telecommunication product or service there will be additional approvers. Either an Asset Manager and or a Telecommunication approver. If the requisition is ready then click [Return] and then click [Save & submit].
Fix a Denied E-Procurement Requisition

Click on the Worklist link located at the top right hand corner.

Click on the Requisition Link. (Notice the Work Item Status is “Transaction Denied”.)

To review the Approvers Denied Comment click the expand icon in the Review/Edit bar.
To update the Requisition click the **Edit Requisition** button.
Update the Requisition and **click either** either **Save & submit** or **Save for Later** will initiate the Workflow processes.

**Click** **Save & submit**
The Workflow process will start again.

Creating a PO from an E-Procurement Requisition (CPO / Buyer function)

Step 1 – Expedite Requisition

To create a Purchase Order from an E-Pro requisition, navigate as follows:

**Navigation: E-procurement > Buyer Center > Expedite Requisitions**

Enter the Business Unit number and the Requisition ID. **Click the Search button.** If you know the requisition number you can enter it here as well.
Enter a Buyer in the Default Buyer ID field, select the lines of the requisition you want to source to the PO and click the Submit button.
Click the **Go to Process Monitor** link

Make note of the Instance number and **click the Refresh button** until the Run Status is Success and the Distribution Status is Posted.
Step 2 – Verifying the PO creation

Once the Expedite Requisition process has ran to Success and Posted, navigate as follows:

*Navigation: Purchasing > Purchase Orders > Stage / Source Request > Sourcing Workbench*

Enter the Instance number and click the **Search** button. If you do not remember the instance number you can enter the Business Unit and Requisition ID and then click the **Search** button.

Your PO has now been created.