



COR452 Introduction to E-Procurement Manual

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History



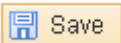
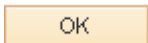


| Document Revision | Date | Description |
|-------------------|------------|---|
| 1.0 | 03/19/2012 | Initial Document |
| 1.1 | 04/16/2012 | Revised to add Line Details information |
| 1.2 | 02/08/2013 | Revised for Statewide application |
| 2.0 | 10/15/2014 | Upgrade Update |

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 **clicking**  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. **Clicking**  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.**

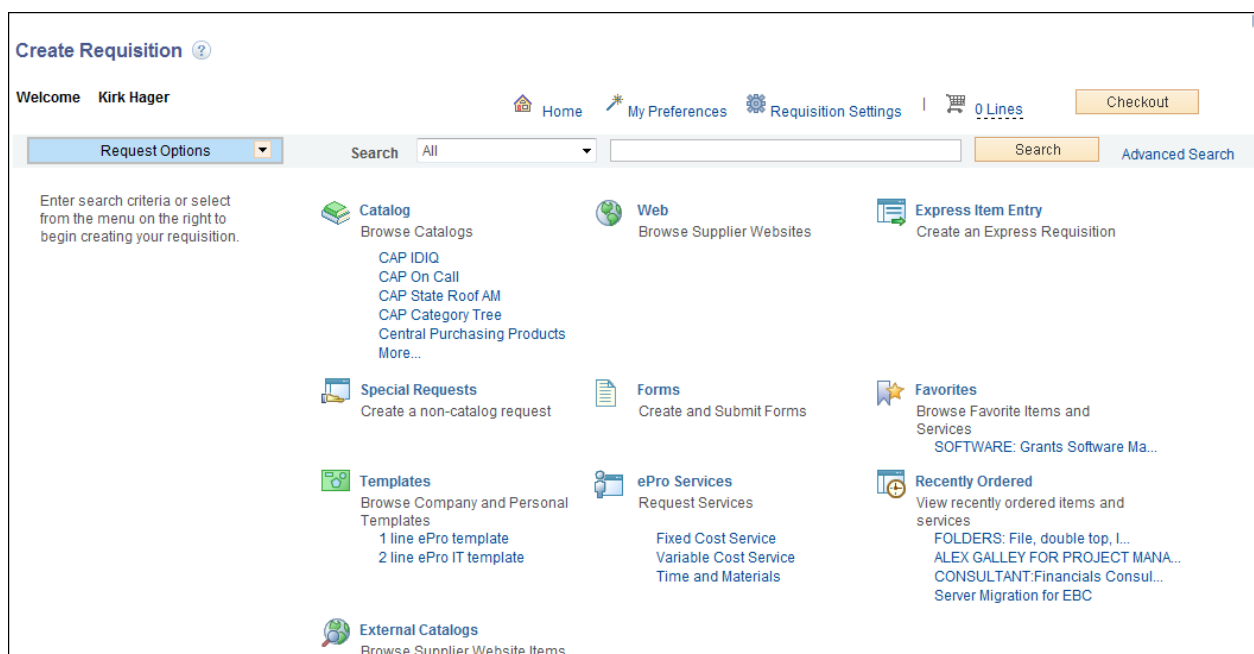
e-Procurement Requisition

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.

Requisition Settings

Business Unit

29000

EDUC & GVT - BU 4

Requisition Name

Requester

BSTERN

Brian Stern

Priority

Medium

*Currency

USD

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Supplier

Category

Supplier Location

Unit of Measure

Buyer

Shipping Defaults

Ship To

Add One Time Address

Due Date

Attention

Accounting Defaults

Personalize | Find | First 1 of 1 Last

Chartfields1

Chartfields2

Chartfields3

Details

Asset Information

Percent

Location

GL Unit

Account

EGV04

OK

Cancel

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

[Line Defaults](#) (?)

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Supplier

Category

Supplier Location

Unit of Measure

Buyer

Shipping Defaults

Ship To

Add One Time Address

Due Date

Attention

Accounting Defaults Personalize | Find | First 1 of 1 Last

| Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information |
|----------------------|----------------------|--------------|----------------------|-------------------|
| Percent | Location | GL Unit | Account | |
| <input type="text"/> | <input type="text"/> | 29000 | <input type="text"/> | |

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

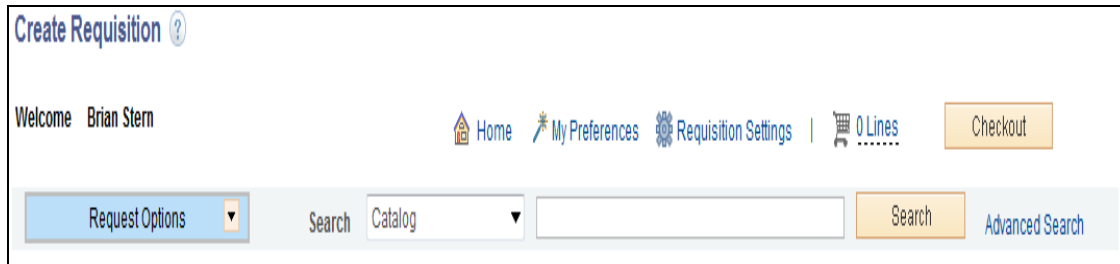
Enter the person from who you want to receive notification about this shipment. The system includes this field value on outbound purchase orders to the Marketplace.

Accounting Defaults

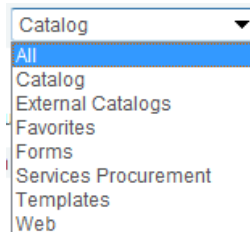
Enter ChartField and asset management information.

Click .

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 Requisition page with more detail.

All Request Options

Catalog

- All Purchase Items
- Computer Equipment
- Hardware Catalog
- Outdoor Supplies

Web

Express Item Entry

Special Requests

Services Procurement

- Resource
- Deliverable
- Multi Resource

Forms

- Business Card SDF
- Business Cards

Favorites

Templates

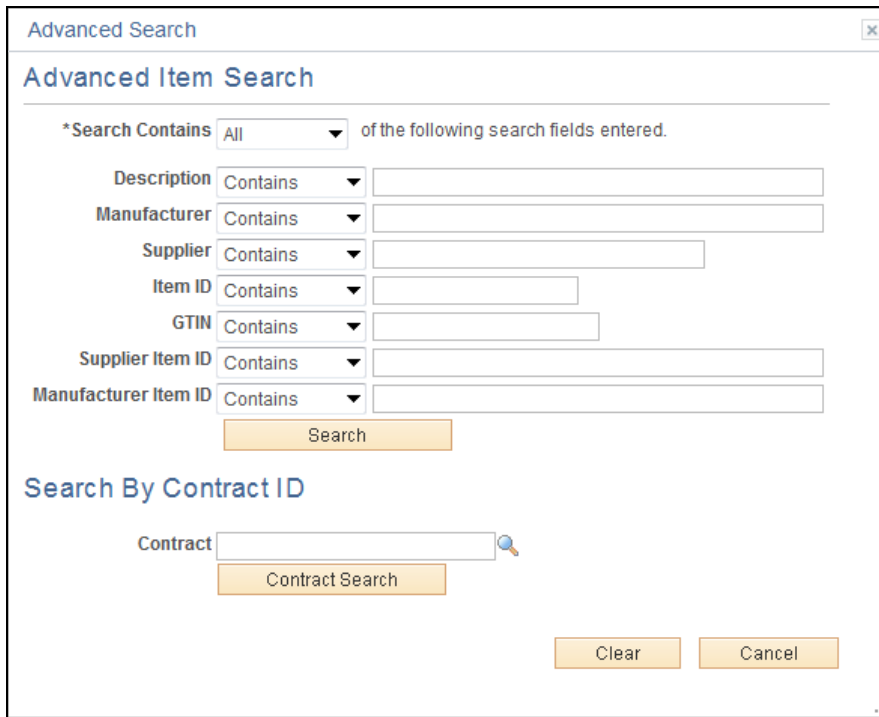
ePro Services

- Fixed Cost Service
- Variable Cost Service
- Time and Materials

Recently Ordered

External Catalogs

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.

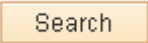
This search looks for items in catalogs, favorites list, templates, services, forms, and the web and displays the results of the search in collapsible grids.

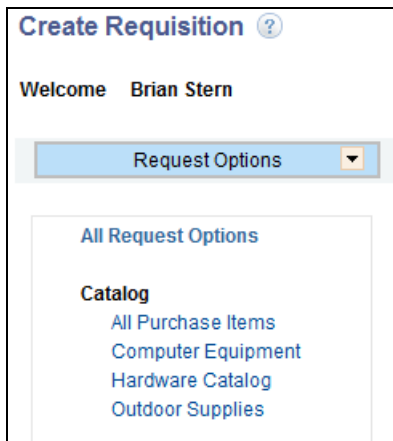
Browsing catalogs.

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  button to complete the search.



Create Requisition ?

Welcome **Brian Stern**

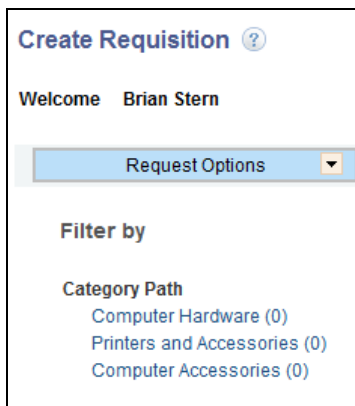
Request Options ▼

All Request Options

Catalog

- All Purchase Items
- Computer Equipment
- Hardware Catalog
- Outdoor Supplies

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.



Create Requisition ?

Welcome **Brian Stern**

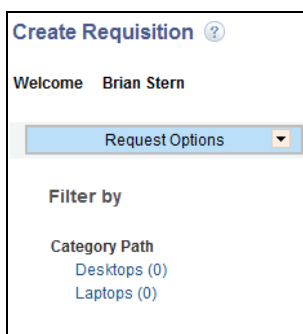
Request Options ▼

Filter by

Category Path

- Computer Hardware (0)
- Printers and Accessories (0)
- Computer Accessories (0)

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.



Create Requisition ?

Welcome **Brian Stern**

Request Options ▼

Filter by

Category Path

- Desktops (0)
- Laptops (0)

And so on.... Until the link is grayed out.

Create Requisition ?

Welcome **Brian Stern**

[Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#) [Checkout](#)

Request Options Search **Catalog** Search [Advanced Search](#)

Filter by

Category Path
Category Path (0)

[Browse Catalogs](#) > [Computer Equipment](#)

[Computer Hardware](#) ☒ [Desktops](#) ☒

*Sort By **Description**

Catalog Search Results ? [Find](#) [First](#) 1-2 of 2 [Last](#)

☐ No Image [Apple iMac Desktop](#)

| | | | |
|-----------------|----------------------|---------------------|---|
| Item ID | DSS_DESKTOP_MAC | Supplier | Midtown Computer Supplies |
| Price | 1798.0000 USD | Manufacturer | |
| UOM | Each | | |
| Quantity | <input type="text"/> | Add | Add to Favorites Add to Template(s) |

☐ No Image [Business Desktop PC](#)

| | | | |
|-----------------|----------------------|---------------------|---|
| Item ID | DSS_DESKTOP_PC | Supplier | Midtown Computer Supplies |
| Price | 720.0000 USD | Manufacturer | |
| UOM | Each | | |
| Quantity | <input type="text"/> | Add | Add to Favorites Add to Template(s) |

☐ Select All/Deselect All [Add Selected To:](#) [Cart](#) [Compare](#) [Favorites](#) [Templates](#)

You can **select** the item by **clicking** the box ☐ located to the left of the item description.

Create Requisition ?

Welcome **Brian Stern** [Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#) [Checkout](#)

Request Options Search **Catalog** Search [Advanced Search](#)

Filter by Browse Catalogs > Computer Equipment

Category Path Computer Hardware ☒ Desktops ☒
Category Path (0)

Catalog Search Results ? [Find](#) First 1-2 of 2 Last

*Sort By Description

☒ No image [Apple iMac Desktop](#)

| | | | |
|---------|-----------------|--------------|---------------------------|
| Item ID | DSS_DESKTOP_MAC | Supplier | Midtown Computer Supplies |
| Price | 1798.0000 USD | Manufacturer | |
| UOM | Each | | |

Quantity [Add](#) [Add to Favorites](#) [Add to Template\(s\)](#)

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.

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.

Return

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.

Checkout - Review and Submit

Review the item information and submit the req for approval. [Requisition Settings](#)

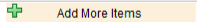
Requisition Summary

Business Unit: 29000 EDUC & GVT - BU 4 Requisition Name:







Requester: BSTERN Brian Stern Priority: Medium

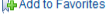



*Currency: USD

Cart Summary: Total Amount 10,072.00 USD

Expand lines to review shipping and accounting details 

Requisition Lines [?](#)

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|--------------------------------|-----------------|---------------------------|----------|------|-----------|---------|---|---|---|
| 1 | Apple iMac Core 2 Duo 2.5GHz 2 | DSS_DESKTOP_MAC | Midtown Computer Supplies | 4.0000 | Each | 1798.0000 | 7192.00 |  |  Add |  |
| 2 | Business Desktop PC Microtower | DSS_DESKTOP_PC | Midtown Computer Supplies | 4.0000 | Each | 720.0000 | 2880.00 |  |  Add |  |

☐ Select All / Deselect All Select lines to:    

Total Amount 10,072.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location
Address
Attention To Brian Stern


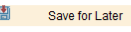
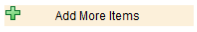
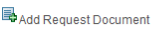
Requisition Comments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

Approval Justification

Enter approval justification for this requisition

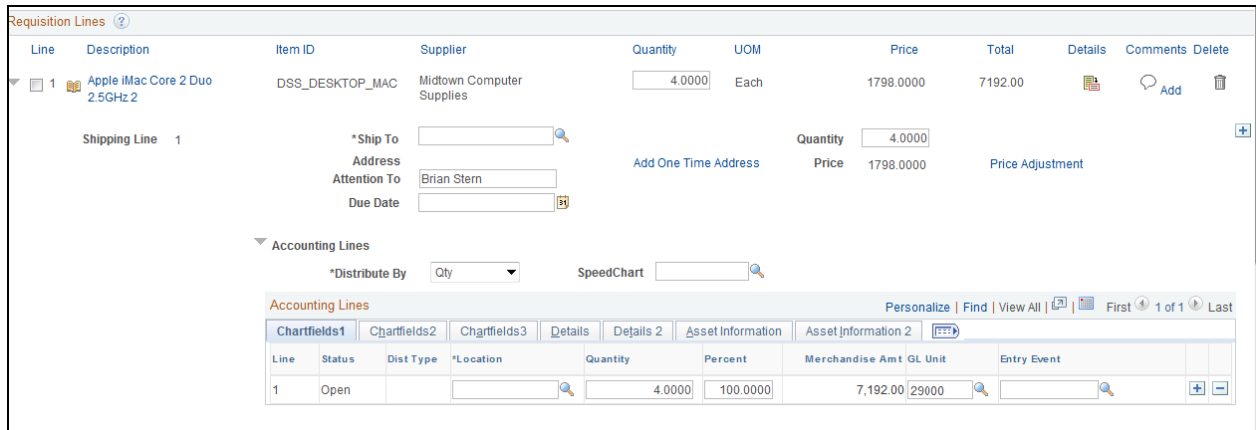
   

Step 3 – Review and Submit

Review and Submit Page

Line

Displays the line number for this requisition item.



Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|--------------------------------|-----------------|---------------------------|----------|------|-----------|---------|---------|----------|--------|
| 1 | Apple iMac Core 2 Duo 2.5GHz 2 | DSS_DESKTOP_MAC | Midtown Computer Supplies | 4.0000 | Each | 1798.0000 | 7192.00 | | | |

Shipping Line 1

*Ship To: [Search]
Address: [Search]
Attention To: Brian Stern
Due Date: [Search]

Accounting Lines

*Distribute By: Qty SpeedChart: [Search]

Accounting Lines

| Line | Status | Dist Type | *Location | Quantity | Percent | Merchandise Amt | GL Unit | Entry Event |
|------|--------|-----------|-----------|----------|----------|-----------------|---------|-------------|
| 1 | Open | | [Search] | 4.0000 | 100.0000 | 7,192.00 | 29000 | [Search] |

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.

| | | | | | |
|--|------------------|------------------|--------------------|-----------------|-------------|
| <input type="checkbox"/> Select All / Deselect All | Select lines to: | Add to Favorites | Add to Template(s) | Delete Selected | Mass Change |
|--|------------------|------------------|--------------------|-----------------|-------------|

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.

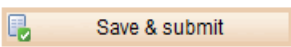
Show at Voucher

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  [Preview Approvals](#) 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.

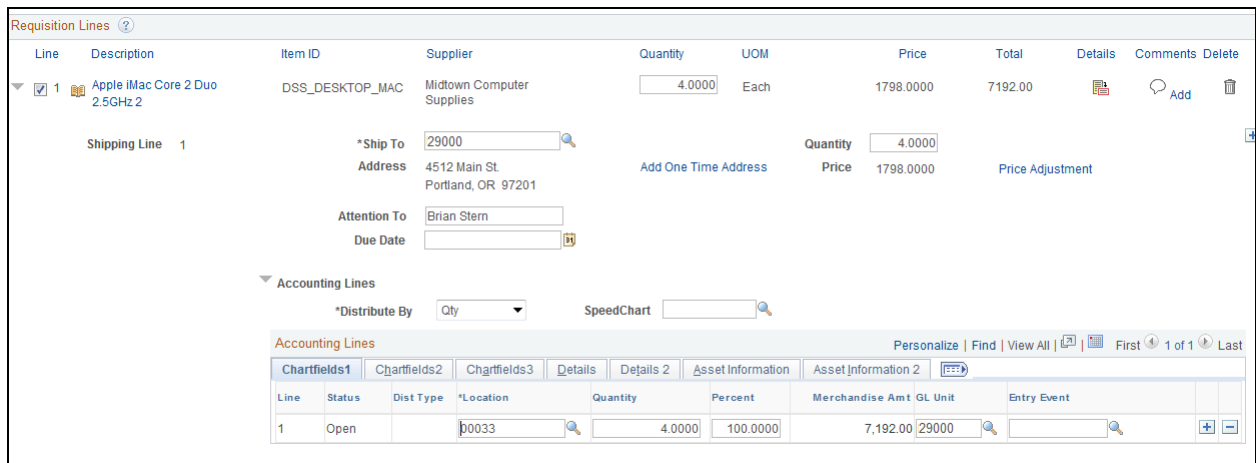
Find More Items

Click  [Add More Items](#) 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.



Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete | | | | | | | | | | | | | | | | | | |
|---|--------------------------------|-----------------|---|----------|----------|-----------------|---|---|---|---|------|--------|-----------|-----------|----------|---------|-----------------|---------|-------------|---|------|--|---|--------|----------|----------|---|---|
| 1 | Apple iMac Core 2 Duo 2.5GHz 2 | DSS_DESKTOP_MAC | Midtown Computer Supplies | 4.0000 | Each | 1798.0000 | 7192.00 |  |  Add |  | | | | | | | | | | | | | | | | | | |
| <p>Shipping Line 1</p> <p>*Ship To: 29000 </p> <p>Address: 4512 Main St. Add One Time Address</p> <p>Portland, OR 97201</p> <p>Price: 1798.0000 Price Adjustment</p> <p>Attention To: Brian Stern</p> <p>Due Date: </p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Accounting Lines</p> <p>*Distribute By: Qty  SpeedChart: </p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Accounting Lines</p> <p>Personalize Find View All  First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Status</th> <th>Dist Type</th> <th>*Location</th> <th>Quantity</th> <th>Percent</th> <th>Merchandise Amt</th> <th>GL Unit</th> <th>Entry Event</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td></td> <td>00033 </td> <td>4.0000</td> <td>100.0000</td> <td>7,192.00</td> <td>29000 </td> <td> </td> </tr> </tbody> </table> | | | | | | | | | | | Line | Status | Dist Type | *Location | Quantity | Percent | Merchandise Amt | GL Unit | Entry Event | 1 | Open | | 00033  | 4.0000 | 100.0000 | 7,192.00 | 29000  |   |
| Line | Status | Dist Type | *Location | Quantity | Percent | Merchandise Amt | GL Unit | Entry Event | | | | | | | | | | | | | | | | | | | | |
| 1 | Open | | 00033  | 4.0000 | 100.0000 | 7,192.00 | 29000  |   | | | | | | | | | | | | | | | | | | | | |

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

Line Details ?

No Image

Line

1

 Apple iMac Core 2 Duo 2.5GHz 2

Line Status

Open

Item Details ?

Merchandise Amount

7192.00 USD

Item ID

DSS_DESKTOP_MAC

Category

DESKTOPS

Original Substituted Item

Description

Physical Nature

Goods

Buyer

CROTH

Buyer Information

Configuration Info

☐ RFQ Required

☐ Device Tracking

☐ Zero Price Indicator

☐ Stockless Item

☐ Amount Only

☐ Inspection Required

Contract Information ?

☒ Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information ?

Supplier ID

USA0000010

Supplier Location

HQ

Supplier Item ID

Supplier's Catalog

Midtown Computer Supplies

Main

Suggest New Supplier

Manufacturer Information ?

Manufacturer ID

Manufacturer

Manufacturer's Item ID

GTIN

Sourcing Controls ?

☐ Consolidate with other Reqs

☒ Calculate Price

☒ Override Suggested Supplier

☐ Inventory Source Flag

OK

Cancel

Click  to return to the previous page.

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|--------------------------------|-----------------|---------------------------|----------|------|-----------|---------|---------|----------|--------|
| 1 | Apple iMac Core 2 Duo 2.5GHz 2 | DSS_DESKTOP_MAC | Midtown Computer Supplies | 4.0000 | Each | 1798.0000 | 7192.00 | | | |

Shipping Line 1

*Ship To: EGV06
Address: 4512 Main St, Portland, OR 97201
Attention To: Brian Stern
Due Date:

*Distribute By: Qty SpeedChart

Accounting Lines

| Line | Status | Dist Type | *Location | Quantity | Percent | Merchandise Amt | GL Unit | Entry Event |
|------|--------|-----------|-----------|----------|----------|-----------------|---------|-------------|
| 1 | Open | | 00033 | 4.0000 | 100.0000 | 7,192.00 | EGV04 | |

- 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 **Add to Template(s)** located under the last line of your requisition to create a template.

Enter a description for your Template

Add Selected Items to Template(s)

| Template Name | Description |
|-------------------------|-------------------------|
| 1 line ePro template | 1 line ePro template |
| 2 line ePro IT template | 2 line ePro IT template |

Add a new template

Template Name:

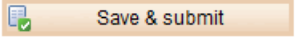
Description: **Testing the template function**

OK Cancel

Click OK

OK

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 & preview approvals

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

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

Cancel Requisition

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

Click the  [Preview Approvals](#) hyperlink at the bottom of the page.

Requested For

Kirk Hager

Requisition Name

IT approval workflow

Requisition ID

0900003640

Business Unit

09000

Status

Open

Priority

Medium

Budget Status

Not Checked

Number of Lines

3

Total Amount

1,500.00 USD

Approve Requisitions

IT approval workflow:Initiated

Start New Path

Path 01

Not Routed

Multiple Approvers
Accounting Validation (OK)

Not Routed

Bryan Moore (090)
Bus Segment/Services Director

Not Routed

Multiple Approvers
Buyer Assignment (OK) - 09000

Path 04

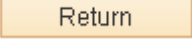
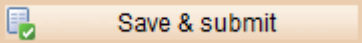
Not Routed

Bob Walker
Telecommunications

Return

Apply Approval Changes

Approval History

Click the  button to return to your requisition and click the  button.

Confirmation

Your requisition has been submitted.

| | | | |
|------------------|----------------------|-----------------|--------------|
| Requested For | Kirk Hager | Number of Lines | 3 |
| Requisition Name | IT approval workflow | Total Amount | 1,500.00 USD |
| Requisition ID | 0900003640 | | |
| Business Unit | 09000 | | |
| Status | Pending | | |
| Priority | Medium | | |
| Budget Status | Not Checked | | |

View printable version
 Edit This Requisition
 Check Budget

Approve Requisitions

IT approval workflow:Pending

View/Hide Comments
 Start New Path

Path 01

Pending
 Multiple Approvers
 Accounting Validation (OK)

→

Not Routed
 Bryan Moore (090)
 Bus Segment/Services Director

→

Not Routed
 Multiple Approvers
 Buyer Assignment (OK) - 09000

→

Path 04

Pending
 Bob Walker
 Telecommunications

→

Comment History

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.

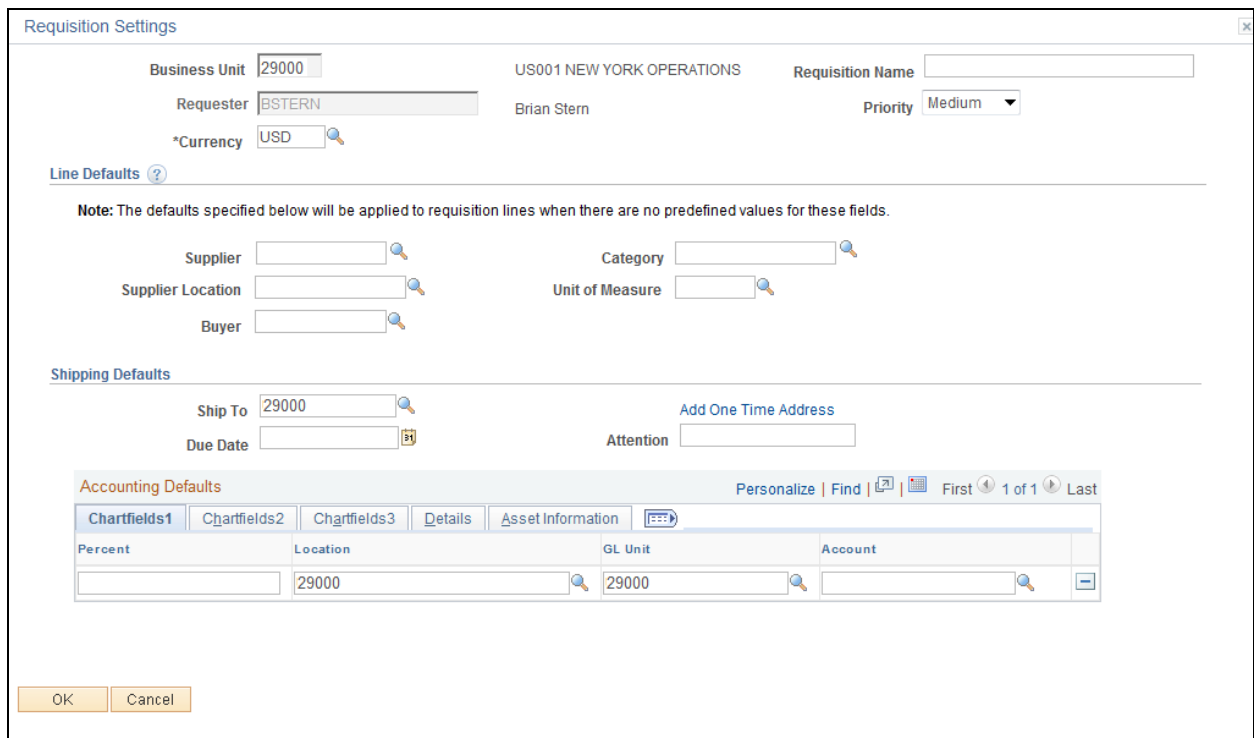
eProcurement Requisition-Order by Description

Step 1 – Define Requestion

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



The screenshot shows the 'Requisition Settings' window. At the top, there are fields for 'Business Unit' (29000), 'US001 NEW YORK OPERATIONS', 'Requisition Name' (empty), 'Requester' (BSTERN), 'Brian Stern', and 'Priority' (Medium). Below these is a 'Line Defaults' section with a note: 'Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.' This section includes fields for 'Supplier', 'Category', 'Supplier Location', 'Unit of Measure', and 'Buyer'. The 'Shipping Defaults' section includes 'Ship To' (29000), 'Add One Time Address', 'Due Date', and 'Attention'. The 'Accounting Defaults' section has tabs for 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', and 'Asset Information'. The 'Chartfields1' tab is active, showing a table with columns: 'Percent', 'Location', 'GL Unit', and 'Account'. The table contains one row with values: 'Percent' (empty), 'Location' (29000), 'GL Unit' (29000), and 'Account' (empty). At the bottom are 'OK' and 'Cancel' buttons.

Leave the Default Requestor "Your Name" or enter the name of the person you are requesting on behalf of

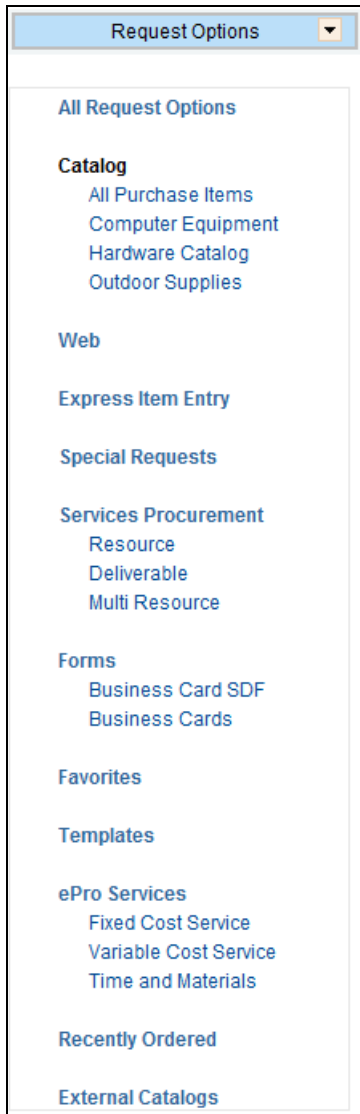
Input an Origin

Requisition Name

Select a Priority.

Click the  button.

Step 2 – Add Item and Services



The screenshot shows a web application interface with a dropdown menu titled "Request Options". The menu is open, displaying a list of categories and sub-items. The categories are: "All Request Options", "Catalog", "Web", "Express Item Entry", "Special Requests", "Services Procurement", "Forms", "Favorites", "Templates", "ePro Services", "Recently Ordered", and "External Catalogs". The "Catalog" category is expanded, showing sub-items: "All Purchase Items", "Computer Equipment", "Hardware Catalog", and "Outdoor Supplies". The "Services Procurement" category is also expanded, showing sub-items: "Resource", "Deliverable", and "Multi Resource". The "ePro Services" category is expanded, showing sub-items: "Fixed Cost Service", "Variable Cost Service", and "Time and Materials".

- Request Options
- All Request Options
- Catalog
 - All Purchase Items
 - Computer Equipment
 - Hardware Catalog
 - Outdoor Supplies
- Web
- Express Item Entry
- Special Requests
- Services Procurement
 - Resource
 - Deliverable
 - Multi Resource
- Forms
 - Business Card SDF
 - Business Cards
- Favorites
- Templates
- ePro Services
 - Fixed Cost Service
 - Variable Cost Service
 - Time and Materials
- Recently Ordered
- External Catalogs

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.

Special Requests ?

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

USD

*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID

Suggest New Supplier

Mfg ID

Manufacturer

Mfg Item ID

☐ Send to Supplier
 ☐ Show at Receipt
 ☐ Show at Voucher

Request New Item

☐ Request New Item

An email notificaitaion will be sent to a buyer regarding this new item request

Add to Cart

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

Currency

Quantity

UOM

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

MFG Item ID
Due Data
Additional Information about the Item
Send to Supplier
Show at Receipt box
Show at Voucher box

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.

Look Up Category

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

Search Categories

Search By
Description
Find

| Categories | | | |
|------------|---------|----------|-------------|
| | Catalog | Category | Description |
| 1 | | | |

Browse Category Tree

Return

Input a description and click the  button.

Look Up Category

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

Search Categories

Search By
Description
Find

| Catalog | Category | Description | Find in Tree |
|-----------------------|-----------------|-----------------------------------|--------------|
| 1 ALL_PURCHASE_ITEMS | 11111111 | | |
| 2 ALL_PURCHASE_ITEMS | 12352201 | | |
| 3 ALL_PURCHASE_ITEMS | 44444444 | | |
| 4 ALL_PURCHASE_ITEMS | 66666666 | | |
| 5 ALL_PURCHASE_ITEMS | ACCESSORIES | Accessories | |
| 6 ALL_PURCHASE_ITEMS | ALLITEMS | All Items | |
| 7 ALL_PURCHASE_ITEMS | CAMPING | Camping Equipment | |
| 8 ALL_PURCHASE_ITEMS | CAT-CD-901 | THIS IS MY CATALOG DESCRIP-901 | |
| 9 ALL_PURCHASE_ITEMS | CLIMBING | Climbing Equipment | |
| 10 ALL_PURCHASE_ITEMS | FISHING | Fishing Equipment | |
| 11 ALL_PURCHASE_ITEMS | MULTIMEDIA | MultiMedia | |
| 12 ALL_PURCHASE_ITEMS | OFFICE_SUPPLIES | Office Supplies | |
| 13 ALL_PURCHASE_ITEMS | FACILITIES | Facilities | |
| 14 ALL_PURCHASE_ITEMS | PRINTERS | Printers | |
| 15 ALL_PURCHASE_ITEMS | CYCLING | Cycling Equipment | |

Browse Category Tree

Return

The Categories that are marked as Non-Catalog will not be available to select. Click on the appropriate Category code to select.

All Request Options

Catalog

- All Purchase Items
- Computer Equipment
- Hardware Catalog
- Outdoor Supplies

Web

Express Item Entry

Special Requests

Services Procurement

- Resource
- Deliverable
- Multi Resource

Forms

- Business Card SDF
- Business Cards

Favorites

Templates

ePro Services

- Fixed Cost Service
- Variable Cost Service
- Time and Materials

Recently Ordered

External Catalogs

Special Requests ?

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID

[Suggest New Supplier](#)

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

This area is for additional description of the item.

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Request New Item

☐ Request New Item An email notification will be sent to a buyer regarding this new item request

Click

Create Requisition ?

Welcome **Brian Stern**

Home My Preferences Requisition Settings | 1 Line [Checkout](#)

Request Options Search All Search Advanced Search

All Request Options

Catalog

- All Purchase Items
- Computer Equipment
- Hardware Catalog
- Outdoor Supplies

Web

Express Item Entry

Special Requests

Services Procurement

- Resource
- Deliverable
- Multi Resource

Forms

- Business Card SDF
- Business Cards

Favorites

Templates

ePro Services

- Fixed Cost Service
- Variable Cost Service
- Time and Materials

Recently Ordered

Special Requests ?

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description

*Price *Currency

*Quantity *Unit of Measure

*Category Due Date

Supplier

Supplier ID

Supplier Name

Supplier Item ID [Suggest New Supplier](#)

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

[Request New Item](#)

The **Special Requests** page reappears for you to add your next item.


Click [Checkout](#) button when you are finished adding items.

Step 3 – Review and Submit

Review and Submit Page

Checkout - Review and Submit

Review the item information and submit the req for approval.

 Requisition Settings


Requisition Summary


Business Unit: US001 NEW YORK OPERATIONS Requisition Name:








Requester: Brian Stern Priority:

*Currency:


Cart Summary: Total Amount 10,000.00 USD

Expand lines to review shipping and accounting details  Add More Items

Requisition Lines 

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|---|--------------|---------|----------|----------|------|------------|---------------|---|--|---|
| 1 | Color copier | | | 1.0000 | Each | 10000.0000 | 10000.00 |  |  Edit |  |
| <div> <input type="checkbox"/> Select All / Deselect All Select lines to:  Add to Favorites  Add to Template(s)  Delete Selected  Mass Change </div> | | | | | | | | | | |
| Total Amount | | | | | | | 10,000.00 USD | | | |

Shipping Summary

 Edit for All Lines

Ship To Location: US001
Address: 144 North Street
New York, NY 10168
Attention To: Brian Stern





Requisition Comments



Enter requisition comments

☐ Send to Supplier
 ☐ Show at Receipt
 ☐ Shown at Voucher

Approval Justification

Enter approval justification for this requisition

 Save & submit
  Save for Later
  Add More Items
  Add Request Document

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 .

Line Comments
[Help](#)

Business Unit 09000
Requisition ID 0900003637

Requisition Date 08/13/2014
Status Approved Line 1

☒ Retrieve Active Comments Only

Retrieve

*Sort Method

Comment Time Stamp

*Sort Sequence

Ascending

Sort

Comments
Find | View All
First 1 of 1 Last

Use Standard Comments
Use Item Specifications

Comment Status Active

Inactivate

+

<<This area is for additional description of the item or instructions>>

☒ Send to Supplier
☐ Show at Receipt
☐ Show at Voucher


Associated Document

| Attachment | Attach | View | Delete | Email |
|--------------------------------|--------|------|--------|-------|
| From -> REQ 09000-0900003637-1 | | | | |

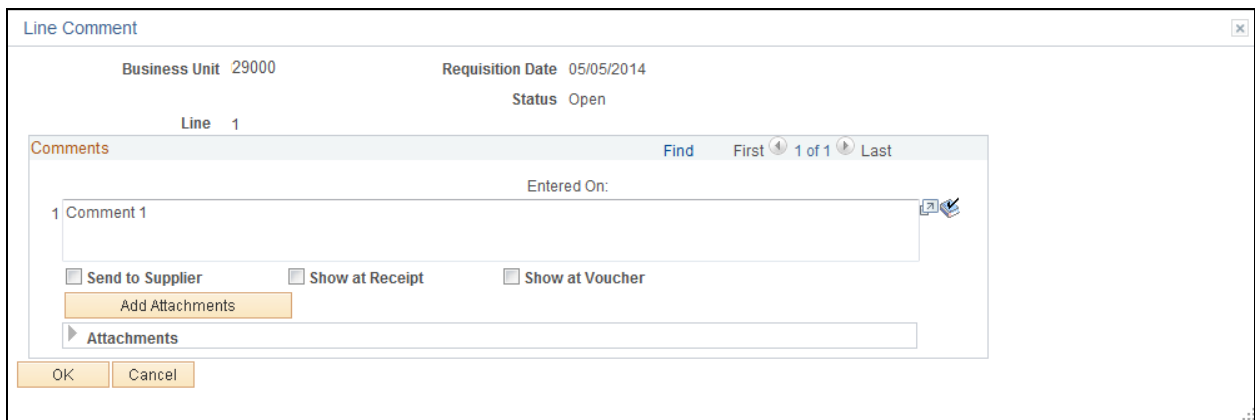
OK

Cancel

Refresh

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.



Line Comment

Business Unit 29000 Requisition Date 05/05/2014
Status Open

Line 1

Comments Find First 1 of 1 Last

Entered On:

1 Comment 1

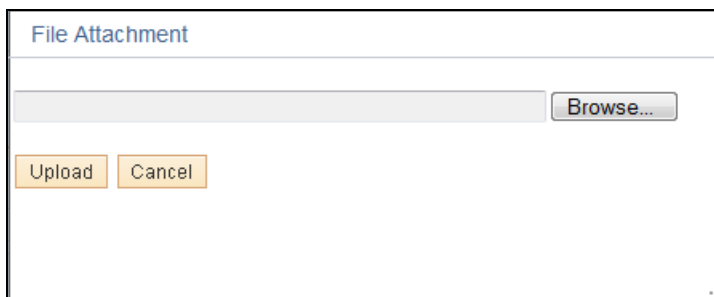
☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Add Attachments

Attachments

OK Cancel

To attach a file click the  button.

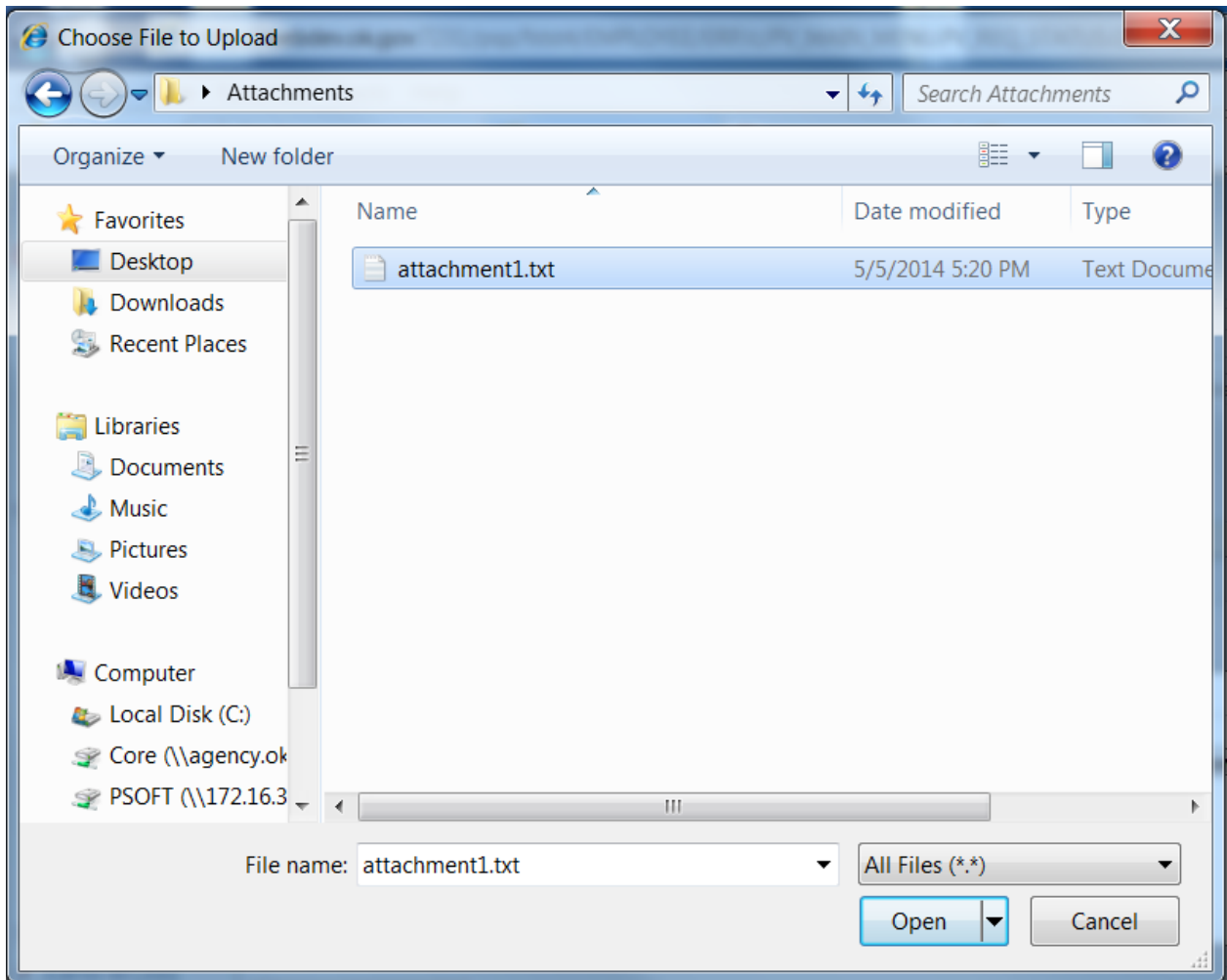


File Attachment

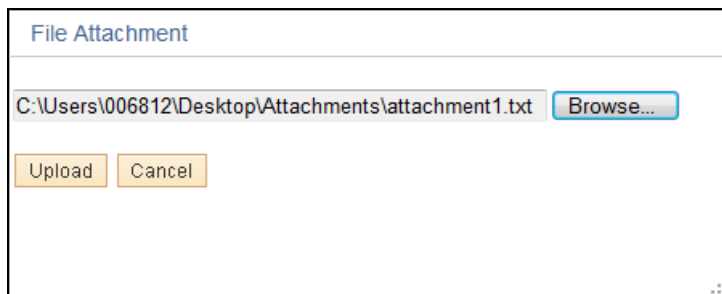
Browse...

Upload Cancel

Click the  button.



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



Click the  button.

Line Comment

Business Unit 29000 Requisition Date 05/05/2014
Status Open

Line 1

Comments Find First 1 of 1 Last

Entered On: 05/05/2014 4:26:35PM

1 Comment 1

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Add Attachments

Attachments

| Attached File | User/Date Time | View | Send to Supplier |
|-------------------|-------------------------------|------|--------------------------|
| 1 attachment1.txt | BSTERN2014-05-05-17.25.20.415 | View | <input type="checkbox"/> |


OK Cancel

You can load additional documents by **clicking** the **Add Attachments** button.

Click the **OK** button.

Checkout - Review and Submit

Review the item information and submit the req for approval.


 Requisition Settings

Requisition Summary




Business Unit
Requester
*Currency

US001 NEW YORK OPERATIONS
Requester Brian Stern
Priority





Cart Summary: Total Amount 10,000.00 USD

Expand lines to review shipping and accounting details 

Requisition Lines


| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|--------------|---------|----------|----------|------|------------|----------|---|---|---|
| 1 | Color copier | | | 1.0000 | Each | 10000.0000 | 10000.00 |  |  |  |

☐ Select All / Deselect All
Select lines to:

 Add to Favorites
 Add to Template(s)
 Delete Selected
 Mass Change

Total Amount 10,000.00 USD

Shipping Summary

 Edit for All Lines

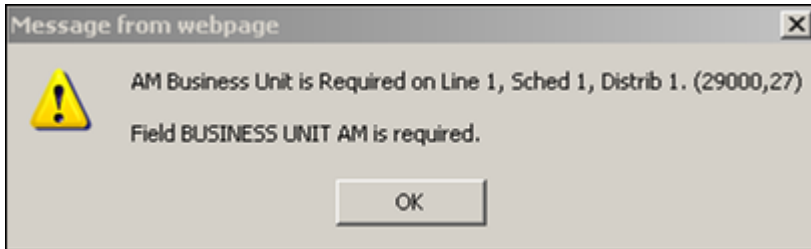
Ship To Location
Address
Attention To

To update the Ship To and Funding **click** on the Expand Bar  to the left of the line.

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|--|--------------|---------|----------|----------|------|------------|----------|---------|----------|--------|
| 1 | Color copier | | | 1.0000 | Each | 10000.0000 | 10000.00 | | | |
| <div> <div>Shipping Line 1</div> <div> <div>*Ship To</div> <div>29000</div> <div>Quantity 1.0000</div> </div> <div> <div>Address</div> <div>144 North Street New York, NY 10168</div> <div>Price 10000.0000</div> </div> <div> <div>Attention To</div> <div>Brian Stern</div> <div>Price Adjustment</div> </div> <div> <div>Due Date</div> <div></div> </div> </div> | | | | | | | | | | |
| Accounting Lines | | | | | | | | | | |

After the ship to', Location and funding is updated **click** on the [Preview Approvals](#) 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.

Requisition Lines ?

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|---|--------------|---------|----------|----------|------|------------|----------|---------|----------|--------|
| 1 | Color copier | | | 1.0000 | Each | 10000.0000 | 10000.00 | | | |
| <p>Shipping Line 1</p> <p>*Ship To 29000</p> <p>Address 144 North Street New York, NY 10168</p> <p>Attention To Brian Stern</p> <p>Due Date</p> <p>Quantity 1.0000</p> <p>Add One Time Address Price 10000.0000 Price Adjustment</p> <p>Accounting Lines</p> <p>*Distribute By Qty SpeedChart</p> <p>Accounting Lines</p> <p>Personalize Find View All First 1 of 1 Last</p> <p>Chartfields1 Chartfields2 Chartfields3 Details Details 2 Asset Information Asset Information 2</p> <p>AM Business Unit Profile ID Tag Number CAP # Sequence Empl ID</p> <p>29000 COMPUTERS</p> | | | | | | | | | | |

Input an AM Business Unit and Profile ID.

Click **Preview Approvals** link.

Approve Requisitions

IT approval workflow: Initiated
Start New Path

Path 01

Not Routed

Multiple Approvers
Accounting Validation (OK)

Not Routed

Bryan Moore (090)
Bus Segment/Services Director

Not Routed

Multiple Approvers
Buyer Assignment (OK) - 09000

Path 04

Not Routed

Bob Walker
Telecommunications

Return
Apply Approval Changes

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 requisitions is ready then click **Return** and then click **Save & submit**.

Approve Requisitions

IT approval workflow: Pending
View/Hide Comments
Start New Path

Path 01

Pending

Multiple Approvers
Accounting Validation (OK)

Not Routed

Bryan Moore (090)
Bus Segment/Services Director

Not Routed

Multiple Approvers
Buyer Assignment (OK) - 09000

Path 04

Pending

Bob Walker
Telecommunications

Comment History

Fix a Denied E-Procurement Requisition

Oracle EBS Worklist interface showing the top navigation bar with links: Home, Worklist, Add to Favorites, Sign out.

Click on the [Worklist](#) link located at the top right hand corner.

Worklist
Worklist for KHAGERREQ: Kirk Hager

Detail View Worklist Filters: Feed

| From | Date From | Work Item | Worked By Activity | Priority | Link | | |
|----------------|------------|--------------------|--------------------|----------|---|-------------|----------|
| Michael Widell | 10/26/2014 | Transaction Denied | Approval Workflow | 2-Medium | Requisition: 202491.00000.1951-01-11 N.O. BUSINESS UNIT:09000 REQ ID:0900003642 | Mark Worked | Reassign |

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

Requisition Review

Business Unit 09000
Requisition ID 0900003642
Requisition Name CAP approval workflow
Requester [Kirk Hager](#)
Entered on 09/09/2014
Status Denied
Priority Medium
Budget Status Not Checked

Total Amount 2,000.00 USD

Requester's Justification
No justification entered by requester.

[Edit Requisition](#) [View printable version](#)

Line Information

| Line | Item Description | Supplier Name | Quantity | UOM | Price | |
|------|------------------|---------------|----------|-----|------------|-----|
| 1 | CAP category | | 2.0000 | EA | 1000.00000 | USD |

[Select All / Deselect All](#)
[View Line Details](#)

[Review/Edit Approvers](#)

[Return to Worklist](#)

To review the Approvers Denied Comment click the expand icon in the Review/Edit bar.

Agency Approval Steps

▼ CAP approval workflow: **Denied** [View/Hide Comments](#)

Path 0

Approved Kirk Hager
Requester
10/26/14 - 9:23 PM → **Denied** Michael Widell
Director
10/26/14 - 9:27 PM → **Terminated** Multiple Approvers
Accounting Validation (OK) → **Terminated** Bryan Moore (090)
Fin Coord/Mgr/Prog Dir → **Terminated** Bryan Moore (090)
Requisition Approver (OK) → **Terminated** Multiple Approvers
Agency Buyer/CPO

► **Comments**

Approve Requisitions

▼ CAP approval workflow: **Denied** [View/Hide Comments](#)

Path 07

Terminated Multiple Approvers
Agency Buyer/CPO → **Terminated** Multiple Approvers
Front Desk Const & Property

► **Comments**



[Return to Worklist](#)

Requisition Review

Business Unit 09000
Requisition ID 0900003642
Requisition Name CAP approval workflow
Requester [Kirk Hager](#)
Entered on 09/09/2014
Status Denied
Priority Medium
Budget Status Not Checked

Total Amount 2,000.00 USD

Requester's Justification
No justification entered by requester.

 [Edit Requisition](#)  [View printable version](#)

▼ **Line Information** [?](#)

Line Information [Personalize](#) | [Find](#) | [L](#) First 1 of 1 Last

| Line | Item Description | Supplier Name | Quantity | UOM | Price | |
|------|------------------|---------------|----------|-----|------------|-----|
| 1 | CAP category | | 2.0000 | EA | 1000.00000 | USD |

☐ [Select All / Deselect All](#)
[View Line Details](#)

► **Review/Edit Approvers**

[Return to Worklist](#)

To update the Requisition click the  [Edit Requisition](#) button.

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#)
[Requisition Settings](#)

Requisition Summary

Business Unit
Requester
*Currency

Mgmt and Enterprise Services
Kirk Hager

Requisition Name
Requisition ID
Priority

Meets OK EITA Standards?

Cart Summary: Total Amount 2,400.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|------|--------------|---------|----------|----------|------|------------|---------|---------|----------|--------|
| 1 | CAP category | | | 2.0000 | EACH | 1200.00000 | 2400.00 | | | |

SW Exception: ☐ SS Flag: ☐ SS Type:

☐ Select All / Deselect All
Select lines to:

[Add to Favorites](#)
[Add to Template\(s\)](#)
[Delete Selected](#)
[Mass Change](#)

Total Amount 2,400.00 USD

Shipping Summary

[Edit for All Lines](#)

Requisition Comments and Attachments

Enter requisition comments

☒ Send to Supplier
☐ Show at Receipt
☐ Shown at Voucher

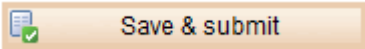
[Add more Comments and Attachments](#)

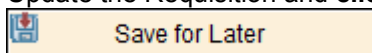
Approval Justification

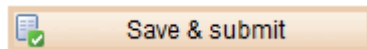
Enter approval justification for this requisition

[Check Budget](#)

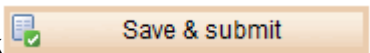
[Save & submit](#)
[Save for Later](#)
[Add More Items](#)
[Preview Approvals](#)

Update the Requisition and **click** either  or

 Save for Later

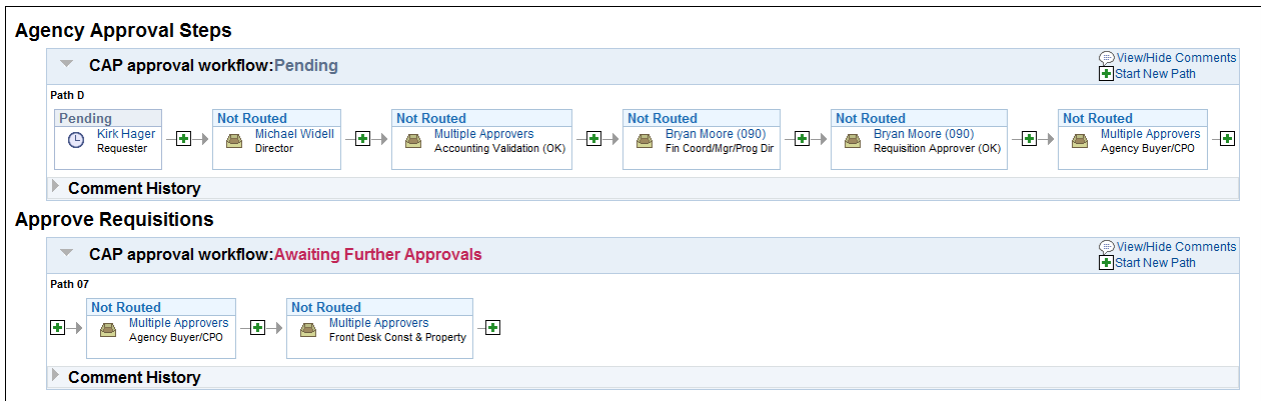
 Save & submit

will initiate the Workflow processes.

Click  Save & submit .

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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

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

| | | | |
|------------------|-------|--|--|
| *Business Unit | 29000 | Category | |
| Requisition ID | | Supplier Name | |
| Requisition Name | | <input checked="" type="checkbox"/> Include Lines With No Supplier | |
| Requester | | | |
| Buyer | | | |

Search Clear

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.

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit
Requisition ID
Requisition Name
Requester
Buyer

Category
Supplier Name
☒ Include Lines With No Supplier

Requisition Schedule Lines

Personalize | Find | View 10 | First 1 of 1 Last

| Include | Requisition ID | Line | Sched | Item Description | Select | Supplier Name | Location | PO Qty | UOM | Price | Curr. | Amount Only |
|-------------------------------------|----------------|------|-------|------------------|--------------------------|---------------|----------|----------|-----|-------|-------|-------------|
| <input checked="" type="checkbox"/> | 0000000150 | 1 | 1 | Long Sleeve Bik | <input type="checkbox"/> | BIKE-001 | MAIN | 100.0000 | EA | 20.00 | USD | N |

☐ Include All/Exclude All
☐ Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID
☒ Build POs as Approved



[Go to Process Monitor](#)



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 button.


Expedite Requisitions


Search Requisition Schedule Lines


To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit  Category 

Requisition ID  Supplier Name 

Requisition Name  ☒ Include Lines With No Supplier


Requester 

Buyer 

☐ Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.


*Default Buyer ID  ☒ Build POs as Approved

[Go to Process Monitor](#)

Click the [Go to Process Monitor](#) link



Process List **Server List**

View Process Request For

User ID  Type Last Days

Server Name Instance to

Run Status Distribution Status ☒ Save On Refresh

Process List [Personalize](#) | [Find](#) | [View All](#) |   First 1 of 1 Last

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------------|--------------|--------|--------------------------|------------|---------------------|-------------------------|
| <input type="checkbox"/> | 15525 | | Application Engine | PV_PO_CREATE | BSTERN | 05/06/2014 7:47:11AM PDT | Success | Posted | Details |

[Go back to Expedite Requisitions](#)

[Process List](#) | [Server List](#)

Make note of the Instance number and **click** the 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

Sourcing Workbench

Sourcing

Search Criteria

| | | | |
|------------------|-------|-----------------|--|
| Process Instance | 15525 | System Source | |
| Business Unit | | PO Stage Type | |
| Requisition ID | | PO Stage ID | |
| Requisition Name | | Stage Status | |
| Buyer | | Item ID | |
| Contract SetID | | Line Number | |
| Contract ID | | Schedule Number | |

Search

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.

Sourcing Workbench

Sourcing

Search Criteria

| | | | |
|------------------|-------|-----------------|--|
| Process Instance | 15525 | System Source | |
| Business Unit | | PO Stage Type | |
| Requisition ID | | PO Stage ID | |
| Requisition Name | | Stage Status | |
| Buyer | | Item ID | |
| Contract SetID | | Line Number | |
| Contract ID | | Schedule Number | |

Search

Search Results

Personalize | Find | View All | First 1 of 1 Last

| Selected Items | Stage Info | Error Messages | | | | | | | | | |
|--------------------------|------------|----------------|-------|-----------|-------------|------|---------|--------------------------------|----------------|----------------|--|
| Sel | Instance | *Stg Status | Unit | Buyer | Supplier ID | Loc | Item ID | Description | Requisition ID | Purchase Order | |
| <input type="checkbox"/> | 15525 | Completed | US001 | Brad Bell | SCM0000001 | MAIN | 10000 | Long Sleeve Biking Jersey, Men | 0000000150 | 0000000263 | |

☒ Select All ☐ UnSelect All **Purge** **Recycle**

Save **Notify** **Refresh**

Your PO has now been created.