

# PS Financials 9.2

Create Requisition Highlights

# Create Requisition pages in PS Financials 9.1

- Display is block-oriented

UNIVERSITY of PUGET SOUND **amarkos-Production** Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

## Create Requisition

**1. Define Requisition** | [2. Add Items and Services](#) | [3. Review and Submit](#)

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

**Business Unit:**  The University of Puget Sound

**Requester:**  Angela Markos      **\*Currency:**

**Requisition Name:**

**Priority:**  ▼

▶ Line Defaults ?

? Help

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

Total Lines:	0
Total Amount (USD):	0

# Create Requisition pages in PS Financials 9.1

- Navigation follows tabular format (e.g. Web, Special Request, etc.)

UNIVERSITY of PUGET SOUND **amarkos-Production** Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

## Create Requisition

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

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

Search:

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

### Browse Catalog ?

\*Select a catalog:

**CATEGORY TREE**

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

### Search Catalog ?

Search contains all of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

UPN ID:

Include Images

[Search Settings](#)

[Review and Submit](#)

#### Requisition Summary

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

Total Lines: 0  
Total Amount (USD): 0

# Create Requisition pages in PS Financials 9.1

- Takes at least 3 clicks to get to the Complete Office punchout link from the first Create Requisition page

UNIVERSITY of PUGET SOUND **amarkos-Production** Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > Create Requisition

## Create Requisition

[1. Define Requisition](#) [2. Add Items and Services](#) [3. Review and Submit](#)

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

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

**Direct Merchants** [Personalize](#) | [Find](#) | [First](#) | [1 of 1](#) | [Last](#)

Logo	Merchant	Description
	<a href="#">Complete Office</a>	Complete Office - Office Supplies

[Review and Submit](#)

? Help

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

Total Lines: 0  
Total Amount (USD): 0

# Create Requisition pages in PS Financials 9.2

- New Look = no more tabs
- Complete Office link is available from first Create Requisition page
- New feature “Recently Ordered” shortcut

University of Puget Sound eProcurement interface showing the "Create Requisition" page. The page includes navigation links (Home, Sign out), a search bar, and a list of options for creating a requisition. A yellow arrow points to the "Recently Ordered" section, which is circled in red and contains a list of recently ordered items and services.

**Recently Ordered**  
View recently ordered items and services

- Strawberry Twizzlers Licoric...
- Combination Lock, Stainless ...
- NITRILE GLOVES XS OUR ITEM N...
- Philips Lighting SLS 14W 14 ...
- BP CREME CLEANSER 12 QT/CS O.
- More...

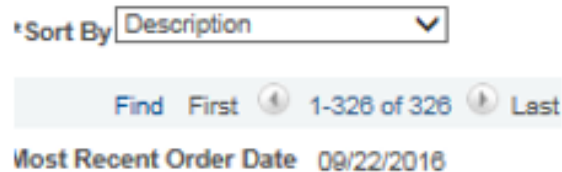
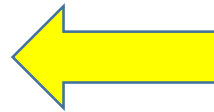
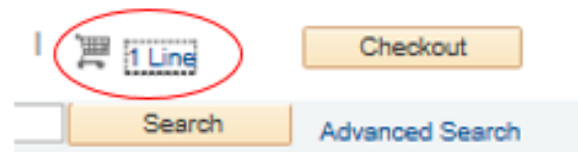
# Create Requisition pages in PS Financials 9.2

- Can add to Shopping Cart right from list of Recently Ordered Items

The screenshot displays the 'Create Requisition' page in the University of Puget Sound's eProcurement system. The page features a navigation bar with 'Favorites', 'Main Menu', 'eProcurement', and 'Requisition'. Below the navigation bar, the user is logged in as 'Rachel Leathers'. The main content area is titled 'Recently Ordered' and shows a list of items. The first item is 'Combination Lock, Stainless Steel, 1 7/8', followed by 'Strawberry Twizzlers Licorice, Individually Wrapp', and the third item, 'NITRILE GLOVES XS OUR ITEM NO. 450074', is circled in red. Each item has a quantity field set to '1', an 'Add' button, and options to 'Add to Favorites' and 'Add to Template(s)'. The 'Add' button for the circled item is highlighted, indicating that items can be added to the shopping cart directly from this list.

# Create Requisition pages in PS Financials 9.2

- Hover mouse over Shopping Cart at top of page to see contents
- Shopping Cart and Checkout button functionality similar to other common online purchasing sites



New Window ? Help Personalize Page http

Shopping Cart

Description	Qty	UOM
NITRILE GLOVES XS OUR ITE...	1	CS

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Total Lines	1
Total Amount (USD)	65.70

Close Checkout

# Create Requisition pages in PS Financials 9.2

- New "Embedded Help" feature

The screenshot displays the 'Checkout - Review and Submit' page in the University of Puget Sound eProcurement system. The page includes a navigation bar with 'Favorites', 'Main Menu', 'eProcurement', and 'Requisition'. The main content area shows the 'Requisition Summary' with fields for Business Unit (PUGET), Requester (rleathers), Requisition Name, Priority (Medium), and Currency (USD). Below this is the 'Cart Summary' showing a total amount of 65.70 USD. A yellow arrow points to a help icon (a question mark in a circle) next to the 'Requisition Lines' header. The 'Requisition Lines' table lists one line item: 'NITRILE GLOVES XS OUR ITEM NO.' with a quantity of 1,000 and a price of 65.70. Below the table are sections for 'Shipping Line' and 'Accounting Lines'. The 'Accounting Lines' section includes a table with columns for Fund, Dept, Project, ChartField 1, Account, Oper Unit, Fund Affiliate, Oper Unit Affil, and Affiliate. The table contains one row with values: 10, 7100, [blank], [blank], 13200, [blank], [blank], [blank], [blank].

Business Unit: PUGET The University of Puget Sound Requisition Name: [input field]  
Requester: rleathers Rachel Leathers Priority: Medium  
\*Currency: USD

Cart Summary: Total Amount 65.70 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	NITRILE GLOVES XS OUR ITEM NO.		COASTWIDE LABORATORIES	1,000	Case	65.7000	65.70		Add	

Shipping Line 1  
\*Ship To: PS00001930  
Address: 901 North Union Avenue Tacoma, WA 98406  
Attention To: Rachel Leathers  
Due Date: [input field]

Accounting Lines  
\*Distribute By: Qty SpeedChart [input field]

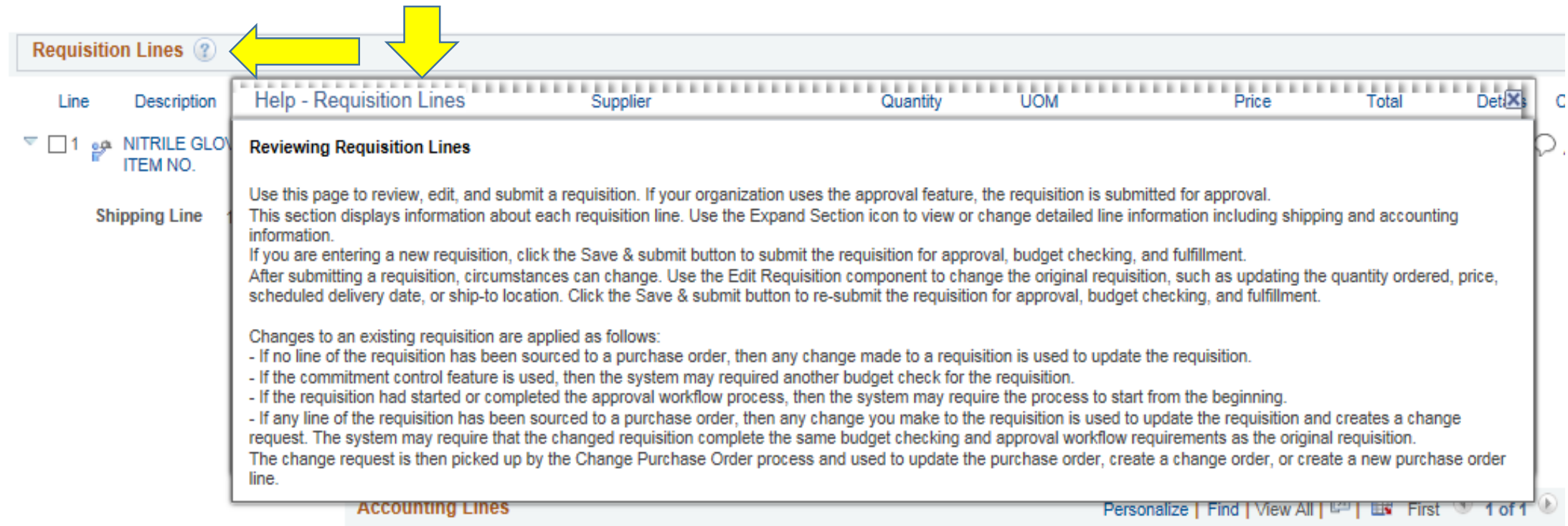
Fund	Dept	Project	ChartField 1	Account	Oper Unit	Fund Affiliate	Oper Unit Affil	Affiliate
10	7100			13200				

Select All / Deselect All  
Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change




# Create Requisition pages in PS Financials 9.2

- Clicking the  displays definitions and/or process help



The screenshot shows the 'Requisition Lines' interface in PS Financials 9.2. The main table has columns for Line, Description, Supplier, Quantity, UOM, Price, Total, and Details. A single line is visible with a checkbox, a magnifying glass icon, and the text 'NITRILE GLOV ITEM NO.' and 'Shipping Line'. A help popup window is open over the table, titled 'Help - Requisition Lines' and 'Reviewing Requisition Lines'. The popup contains detailed instructions on how to review, edit, and submit a requisition, including information about approval workflows and budget checks. Two yellow arrows point to the help icon in the table header and the help popup window.

Line	Description	Supplier	Quantity	UOM	Price	Total	Details
<input type="checkbox"/> 1	 NITRILE GLOV ITEM NO.						

### Help - Requisition Lines

#### Reviewing Requisition Lines

Use this page to review, edit, and submit a requisition. If your organization uses the approval feature, the requisition is submitted for approval.

This section displays information about each requisition line. Use the Expand Section icon to view or change detailed line information including shipping and accounting information.

If you are entering a new requisition, click the Save & submit button to submit the requisition for approval, budget checking, and fulfillment.

After submitting a requisition, circumstances can change. Use the Edit Requisition component to change the original requisition, such as updating the quantity ordered, price, scheduled delivery date, or ship-to location. Click the Save & submit button to re-submit the requisition for approval, budget checking, and fulfillment.

Changes to an existing requisition are applied as follows:

- If no line of the requisition has been sourced to a purchase order, then any change made to a requisition is used to update the requisition.
- If the commitment control feature is used, then the system may required another budget check for the requisition.
- If the requisition had started or completed the approval workflow process, then the system may require the process to start from the beginning.
- If any line of the requisition has been sourced to a purchase order, then any change you make to the requisition is used to update the requisition and creates a change request. The system may require that the changed requisition complete the same budget checking and approval workflow requirements as the original requisition. The change request is then picked up by the Change Purchase Order process and used to update the purchase order, create a change order, or create a new purchase order line.

Accounting Lines

Personalize | Find | View All | First 1 of 1

# Create Requisition pages in PS Financials 9.2

- New button for Add More Items functionality
- Save & preview approvals feature has been split into two different buttons
- Must click Save for Later button before able to click Preview Approvals

Navigation: Favorites > Main Menu > eProcurement > Requisition

UNIVERSITY of PUGET SOUND

Fund	Dept	Project	ChartField 1	Account	Oper Unit	Fund Affiliate	Oper Unit Affil	Affiliate
10	7100			13200				

Select All / Deselect All      Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 65.70 USD

### Shipping Summary

[Edit for All Lines](#)

Ship To Location PS00001930  
Address 901 North Union Avenue  
Tacoma, WA 98406  
Attention To Rachel Leathers

### Requisition Comments

Enter requisition comments

Send to Supplier     Show at Receipt     Shown at Voucher

### Approval Justification

Enter approval justification for this requisition

[Check Budget](#)

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

# Create Requisition pages in PS Financials 9.2

- Smaller screen opens now when buttons are clicked (i.e. no longer replaces original page)
- Check Budget button no longer available on Preview Approvals page (i.e. must check budget from original page)

The screenshot displays the 'Preview Approvals' window for a requisition. The requisition details are as follows:

Requested For	Rachel Leathers	Number of Lines	1
Requisition Name	0000007694	Total Amount	65.70 USD
Requisition ID	0000007694		
Business Unit	PUGET		
Status	Open		
Priority	Medium		
Budget Status	Not Checked		

The 'Department Approval' section shows a flow for 'Line 1: Initiated' (NITRILE GLOVES XS OUR ITEM NO. 450074). The flow consists of five steps:

- Skipped: No approvers found Authorized Approver
- Skipped: No approvers found Authorized Approver
- Skipped: No approvers found Authorized Approver
- Skipped: No approvers found Authorized Approver
- Not Routed: Lori D Seager Authorized Approver

Buttons at the bottom of the window include 'Return' (highlighted with a yellow arrow) and 'Apply Approval Changes'. In the background, the 'Check Budget' button is circled in red.