



Requisition training is done in FSTST environment.

A purchase requisition is a request sent to the Purchasing department to procure goods or services. It is originated and approved by the department requiring the goods or services. Typically, it contains a description and quantity of the goods or services to be purchased.

In this training exercise, we will create a requisition to purchase two items. We will pay for them with one cost center (distribution). Then we will add a second distribution to the second item.

To proceed with the training, follow the steps below:

[Home](#) / [About UHCL](#) / [Administrative Offices](#) / [Business Operations](#) / [PeopleSoft Finance Access](#)

## PeopleSoft Finance Access

Accounting Handbook
Exceptions
Forms
Innovation Suggestions and General Feedback
Official Tax Documents
PeopleSoft Finance Access
Student Financial Appeals
Tools

### Get started with UHCL PeopleSoft Finance training!

#### Instructions:

- [Step-by-Step instructions to access to PeopleSoft Finance](#)

[UHCL PeopleSoft Finance Access Request Form](#)

[PeopleSoft Access for New Hire Diagram](#)

#### Questions about PeopleSoft Finance?

Contact [BusOpsAnalyst@uhcl.edu](mailto:BusOpsAnalyst@uhcl.edu)

### PeopleSoft Finance Training

[FSTST Training Login](#)

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1. Click the **FSTST Training Logon** hyperlink located on the Training page.



The sign in page for FSTST is displayed.

UNIVERSITY of **HOUSTON** SYSTEM

Sign in with Microsoft (School Account) ▼

or

User ID

2a

Password

2b

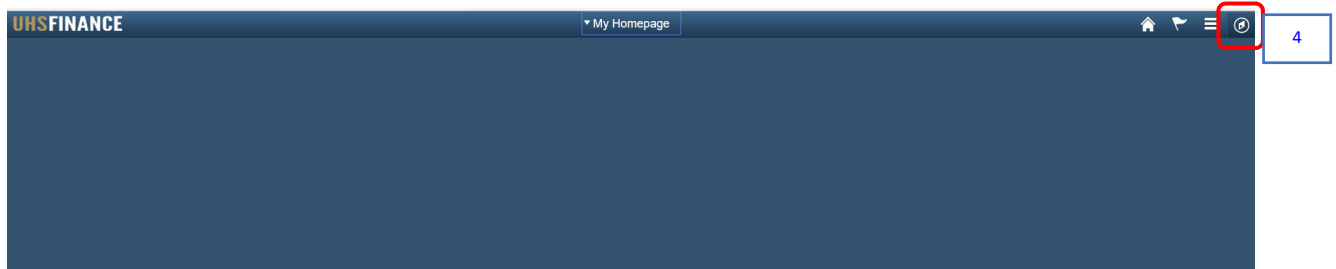
Forgot Password? | Forgot User ID?


3 Sign In

Enable Screen Reader Mode

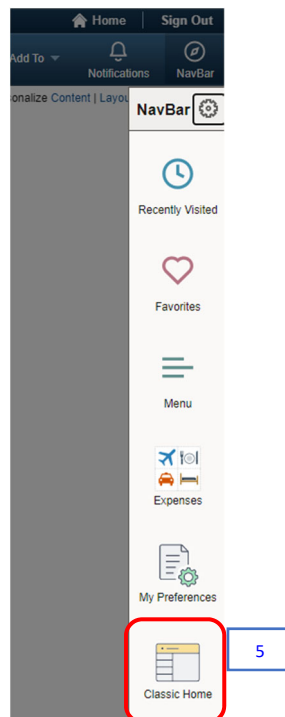
2. Enter the following information provided by your training administrator:
  - a. **User ID**
  - b. **Password** (password is case sensitive)
3. Click the **Sign In** button.

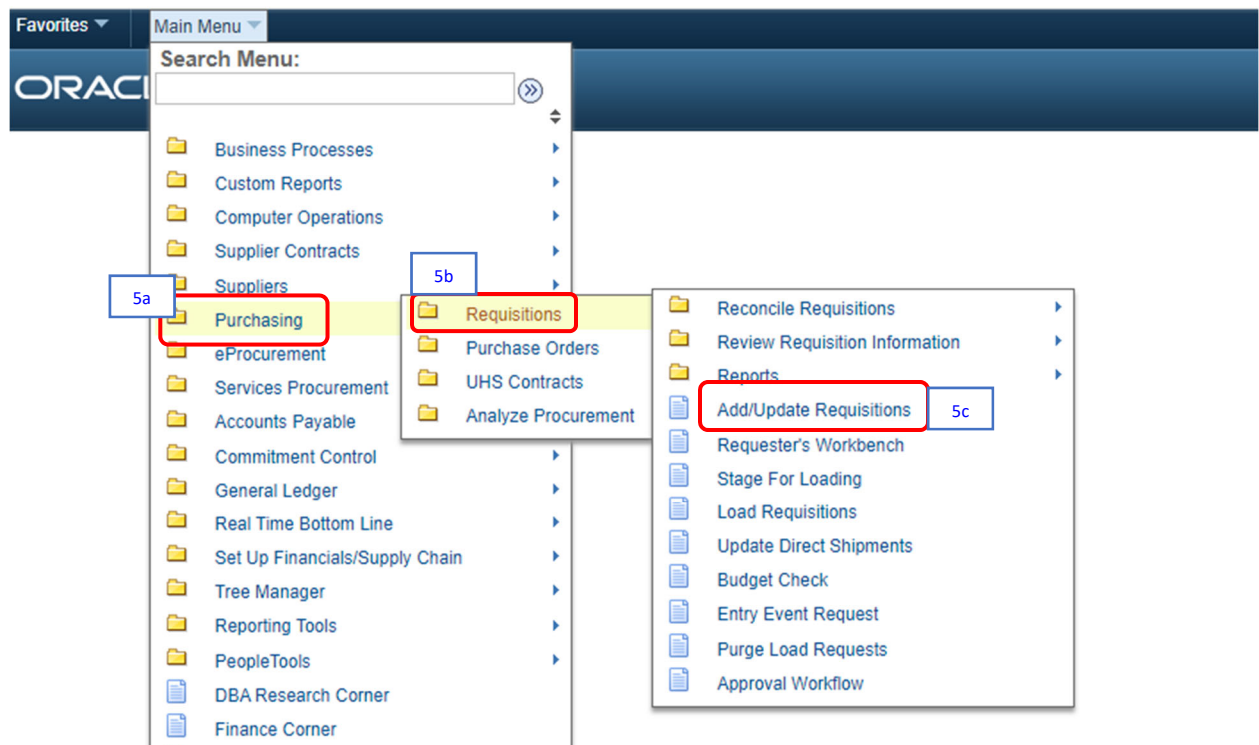
The PeopleSoft Finance home page is displayed.



4. Click the **NavBar**  icon on the upper right hand side of the home page.

The NavBar menu is displayed.





5. From the NavBar menu, click on **Navigator > Classic Home**. Then navigate to **(5a) Purchasing > (5b) Requisitions > (5c) Add/Update Requisitions**.



The Requisition – Add/Search page is displayed – defaulted to Add a New Value tab. The navigation is shown on top of the page.

Requisitions

Add a New Value

\*Business Unit: 00759

\*Requisition ID: Business Unit Description

00759	Univ. of Houston - Clear Lake
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6 Add

6. Click the **Add** button.



The Requisition Data Entry page is displayed – defaulted to Form tab.

Req Form | Req Schedule | Approval | Documents | TIBH Verify

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Maintain Requisitions

### Requisition

Business Unit 00759      Status Open   
Requisition ID NEXT      Budget Status Not Chk'd  
Requisition Name  Copy From       Hold From Further Process

▼ Header ?

\*Requester  Training Login-CLC  
\*Requisition Date  Requester Info  
Origin  ALL UHCL  
\*Currency Code  DEPARTMENTS  
Accounting Date  Dollar

[Requisition Defaults](#) Add Comments  
Requisition Activities

Amount Summary ?

Total Amount	0.00	USD
--------------	------	-----

Add Items From ?

Purchasing Kit	Catalog
Item Search	Requester Items

7. Click the **Requisition Defaults** hyperlink to enter the information that will apply to the entire requisition.



The Requisition Defaults page is displayed.

## Requisition Defaults

Business Unit	00759	Requisition Date	04/04/2024
Requisition ID	NEXT	Status	Open

**Default Options** ?

**Default**      If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

**Override**      If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

<b>Line</b>													
<table border="0"> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Buyer</td> <td style="border: 1px solid #ccc; padding: 2px;">8</td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Supplier</td> <td style="border: 1px solid #ccc; padding: 2px;"></td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Category</td> <td style="border: 1px solid #ccc; padding: 2px;"></td> </tr> </table>	Buyer	8	Supplier		Category		<table border="0"> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Unit of Measure</td> <td style="border: 1px solid #ccc; padding: 2px;"></td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Supplier Location</td> <td style="border: 1px solid #ccc; padding: 2px;"></td> </tr> <tr> <td style="border: 1px solid #ccc; padding: 2px;">Supplier Lookup</td> <td style="border: 1px solid #ccc; padding: 2px;">9</td> </tr> </table>	Unit of Measure		Supplier Location		Supplier Lookup	9
Buyer	8												
Supplier													
Category													
Unit of Measure													
Supplier Location													
Supplier Lookup	9												

- Catina Chapman (ID# 8006198)** is currently setup as *UHCL default buyer*. Some departments like Library have their own buyer. Check with your Division Business Administrator.

For our example, enter Catina Chapman's ID "**8006198**" on the *Buyer* field.

- Enter the **Vendor ID** and **Vendor Location** if available. Otherwise, click the **Vendor Lookup** hyperlink to search for them.

For our example, click the **Vendor Lookup** hyperlink.



The Vendor Search page is displayed.

## Vendor Search

**Search Criteria**

Name:   ShortName:

Alternate Vndr Name:

City:  State:

Country:  Postal:

Class:  Type:

Max Rows:

**Search Results** Personalize | Find | View All | First 1 of 1 Last

Sel	Vendor ID	Location	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>						

Vendor Detail      Address

10. Enter the **Vendor Name** in the *Name* field.

For our example, enter "**CHIN, OTT**" in the *Name* field.

11. Click the **Search** button.





The search results are displayed.

## Vendor Search

### Search Criteria

Name:	<input type="text" value="CHIN, OTT"/>	ShortName:	<input type="text"/>
Alternate Vndr Name:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
Country:	<input type="text"/>	Postal:	<input type="text"/>
Class:	<input type="text"/>	Type:	<input type="text"/>
Max Rows:	<input type="text" value="10"/>		

Search

1 to 1 of 1

### Search Results

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

Sel	Vendor ID	Location	Address	Short Vendor Name	Name 1	Withholding Applicable
<input checked="" type="checkbox"/>	0000156940	V		1 CHINOTT-001	CHIN, OTT	Y

12a

Vendor Detail Address

12b

12. Select the **Order Address** from the Search Results.

To find the order address *if multiple rows are returned*, (12a) check the **Sel** box corresponding to the address line and (12b) click the **Vendor Details** hyperlink.

For our example, select the row; and click the **Vendor Detail** hyperlink.



The Vendor Detail page is displayed.

## Vendor Detail

SetID:	00797	Vendor ID:	0000156940	Vendor Status:	Approved
Short Vendor Name:	CHINOTT-001	Vendor Classification:	Other	HR Class:	
In City Limit:	N	Persistence:	Regular	Open For Ordering:	Y
Vendor Name 2:		Withholding Applicable:	Y	Display VAT Flag:	N
Alternate Vndr Name:		Address:	00001 R:DBA SAGE WEST OFFICE SUPPLIE		
Corporate Vendor:	0000156940	CHIN, OTT			
Remit Vendor:	0000156940	CHIN, OTT			

Vendor Types		Personalize	Find	View All	First	1 of 1	Last
Type	Long Name						

OK Cancel Refresh

(12c) First, check that the vendor is **Open for Ordering**, which means that it is in good standing with the state. The flag must be "Y" or a requisition cannot be processed with this vendor.

(12d) Most of the time, the order address is preceded by "O." You may need to check each address in the list on the Vendor Search page (previous page) until the order address is found. If there is none, check for address used on the quote or on previous requisitions. For assistance, call Purchasing at extension x2150.

(12e) Click the **OK** button to return to the Vendor Search page.



The Vendor Search page is displayed.

## Vendor Search

**Search Criteria**

Name:  ShortName:

Alternate Vndr Name:

City:  State:

Country:  Postal:

Class:  Type:

Max Rows:

1 to 1 of 1

**Search Results** Personalize | Find | View All | First 1 of 1 Last

Sel	Vendor ID	Location	Address	Short Vendor Name	Name 1	Withholding Applicable
<input checked="" type="checkbox"/>	0000156940	V		1 CHINOTT-001	CHIN, OTT	Y

Vendor Detail Address

13

13. Click the **OK** button.



The Requisition Defaults page is displayed with the *Vendor ID* and *Vendor Location* populated.

## Maintain Requisitions

### Requisition Defaults

<b>Business Unit:</b>	00759	<b>Requisition Date:</b>	03/02/2021
<b>Requisition ID:</b>	NEXT	<b>Status:</b>	Open

**Default Options**

**Default**      If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

**Override**      If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

<b>Line</b>			
<b>Buyer:</b>	8006198	Chapman, Catina T	<b>Unit of Measure:</b>
<b>Vendor:</b>	0000156940	CHIN, OTT	<b>Vendor Location:</b> V
<b>Category:</b>		Vendor Lookup	

**Schedule**

<b>Ship To:</b>	CB0402A	RECEIVING	<b>*Distribute By:</b>	Amount
<b>Due Date:</b>	03/02/2021			
<b>Ultimate Use Code:</b>				
<b>Attention To:</b>		One Time Address		

14. The *Ship To* field is defaulted based on security setup.

- An employee working at the Pearland Campus will default to **"PEARLAND."**
- An employee working at the UHCL Campus will default to **"CB0402A."**
- Change the **Ship To Location** if the items need to be shipped to different location.

For our example, do not change the default value of **"CB0402A."**

15. Enter the **Due Date**, which is the date you are creating the requisition. Later, the Purchasing Department will change this date to the actual one on the purchase order.

For our example, enter **today's date**.



16. Do not change *Distribute by* field.

The screenshot shows the 'Distribution' form in PeopleSoft. At the top, the 'SpeedChart' field contains '15835' (callout 17). Below it, the 'Distributions' table has columns for Dist, Percent, GL Unit, Entry Event, Account, Fund, Dept, Program, Bud Ref, PC Bus Unit, and Project. The 'Account' field in the first row contains '53900' (callout 18). The 'Project' field contains 'NA' (callout 17). At the bottom left, the 'OK' button is circled in red (callout 19). Below the table is a grid with columns: Activity, ChartField 1, Chartfield1 Value, Affiliate, Fund Affil, Budget Date, Location, and IN Unit. The 'Budget Date' field contains '03/02/2021' and the 'Location' field contains 'NOAII-1500'.

17. In the Distribution section, enter the cost center that will apply to all the lines on the requisition. Enter the **Speed Type** on the *SpeedChart* field and tab out of the field. The cost center will populate automatically.

For our example, enter “15835” for **Speed Type**.

18. Enter the **Account**.

For our example, enter “53900” for **Account**.

Note: Do not add second distribution on defaults. We will add a second distribution on Step 37.

19. Click the **OK** button to return to the Forms page.



The Req Form page is displayed.

Req Form | Req Schedule | Approval | Documents | TIBH Verify

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Maintain Requisitions

### Requisition

Business Unit 00759      Status Open   
Requisition ID NEXT      Budget Status Not Chk'd  
Requisition Name  Copy From       Hold From Further Processing

▼ Header ?

\*Requester TRAINCLC07  Training Login-CLC  
\*Requisition Date 04/04/2024  Requester Info  
Origin 000  ALL UHCL  
\*Currency Code USD  DEPARTMENTS  
Accounting Date 04/04/2024  Dollar

Requisition Defaults      **Add Comments**      20  
Requisition Activities

Amount Summary ?

Total Amount	0.00	USD
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Add Items From ?

Purchasing Kit      Catalog  
Item Search      Requester Items

20. Click the **Add Comments** hyperlink in the Header section of the Form tab to enter comments related to the entire Requisition. These comments will be printed on the Requisition Coversheet.

The Header Comments page is displayed.

## Header Comments

Business Unit: 00759 Requisition Date: 03/02/2021  
Requisition ID: NEXT Status: Open

\*Sort Method:  \*Sort Sequence:

**Comments** Find | View All First **1 of 1** Last  
Use Standard Comments Comment Status: Active

The order was placed by U. R. Fine for supplies required for a training class. Please contact John at 281-283-9999 if there are any questions. This quote was given by R. A. Way from Chin, Ott.

Send to Vendor  Show at Receipt  
 Show at Voucher

**Associated Document**  
Attachment:     Email  
From -> REQ 00759-NEXT

OK

21. Enter any comments intended for the vendor or the Purchasing Department such as requested by, quote given by, contact phone number and contact fax number.

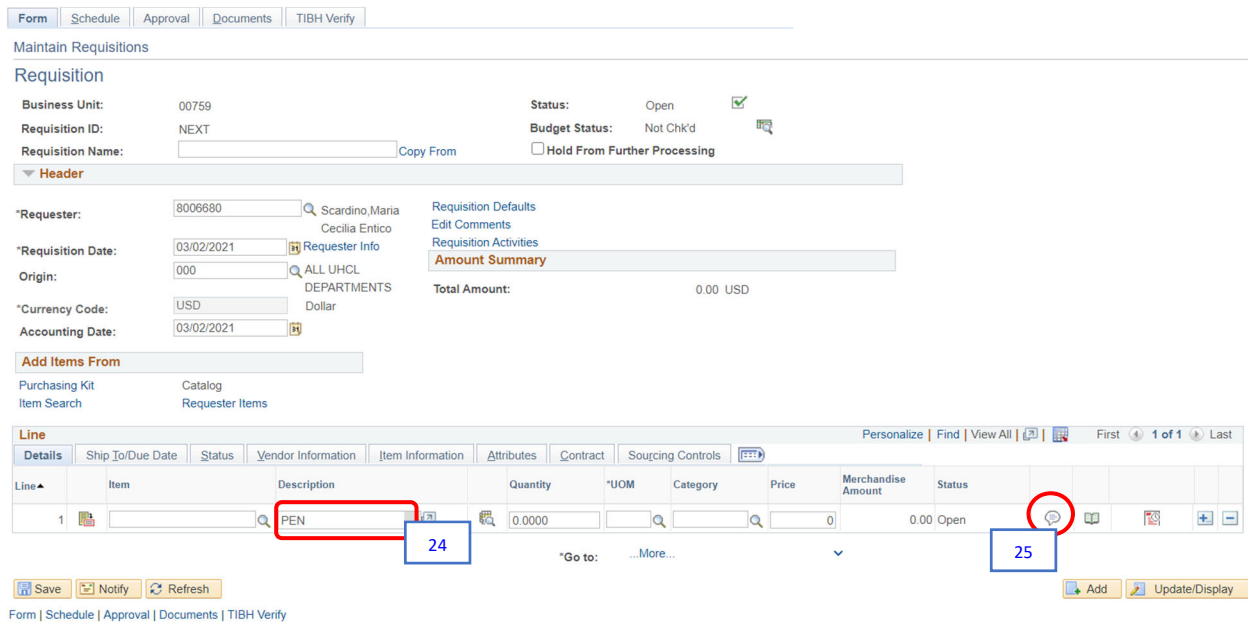
For **Fixed Asset Purchases** (purchases using accounts 54354, 54355, or 58XXX), enter the employee name and contact number the asset is going to, the asset location (building and room) and the assigned department (code and name).

For our example, enter: ***"The order was placed by U. R. Fine for supplies required for a training class. Please contact John at 281-283-9999 if there are any questions. This quote was given by R. A. Way from Chin, Ott."***

22. Check the *Send to Vendor* box to print these comments on the requisition.

23. Click **OK** to return to the Form page.


The Form page is displayed.



The screenshot displays the 'Maintain Requisitions' form. Key fields include: Business Unit (00759), Requisition ID (NEXT), Requisition Name (with a 'Copy From' button), Status (Open), Budget Status (Not CHK'd), and a 'Hold From Further Processing' checkbox. The 'Header' section shows the requester (Scardino, Maria Cecilia Entico), requisition date (03/02/2021), origin (ALL UHCL), and currency (USD). Below this is an 'Add Items From' section with options for Purchasing Kit, Catalog, and Requester Items. The main table, titled 'Line', has columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line (Line 1) has a description of 'PEN' and a quantity of 0.0000. A red box highlights the 'PEN' text, and a blue box labeled '24' points to it. A speech bubble icon in the action column of this line is circled in red, with a blue box labeled '25' pointing to it. At the bottom, there are buttons for Save, Notify, Refresh, Add, and Update/Display.

24. Enter the **description** of the item to be purchased. The Description field has 254 characters limit. For items with longer descriptions, enter a short description here and the rest of the description on the Line Comments page.

For our example, enter: **PEN**.

25. To enter a complete description for the line selected, click the  of the respective line.



The Line Comments page is displayed.

## Line Comments

Business Unit: 00759 Requisition Date: 03/02/2021  
Requisition ID: NEXT Status: Open Line: 1

\*Sort Method: Comment Time Stamp \*Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 1 Last  
Use Standard Comments Comment Active Inactivate Undo +  
Use Item Specifications Comment Status:

26 This is a test requisition.

27  Send to Vendor  Show at Receipt  
 Show at Voucher

Associated Document  
Attachment: Attach View Delete Email

From -> REQ 00759-NEXT

28 OK Cancel Refresh

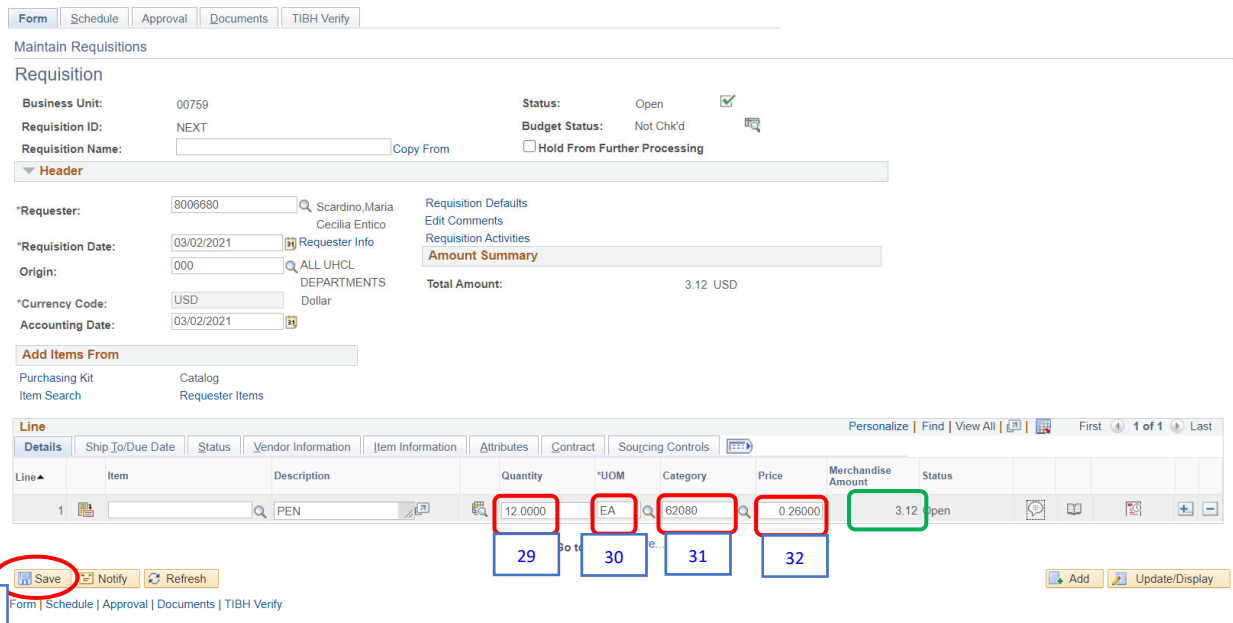
26. Enter a complete long description for Item 1.

For our example, enter any description you like.

27. Check the *Send to Vendor* box to print these comments on the requisition.

28. Click the **OK** button to return to the Form page.

The Form page is displayed.



Form | Schedule | Approval | Documents | TIBH Verify

Maintain Requisitions

Requisition

Business Unit: 00759 Status: Open

Requisition ID: NEXT Budget Status: Not Chk'd

Requisition Name:  Copy From  Hold From Further Processing

Header

\*Requester: 8006680 Scardino, Maria Cecilia Entico

\*Requisition Date: 03/02/2021 Requester Info

Origin: 000 ALL UHCL DEPARTMENTS

\*Currency Code: USD Dollar

Accounting Date: 03/02/2021

Requisition Defaults  
Edit Comments  
Requisition Activities  
Amount Summary

Total Amount: 3.12 USD

Add Items From

Purchasing Kit Catalog  
Item Search Requirer Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	PEN		12.0000	EA	62080	0.26000	3.12	open

29 30 31 32


Save Notify Refresh

33 Form | Schedule | Approval | Documents | TIBH Verify


Add Update/Display

29. Enter the **quantity** you are ordering.

For our example, enter **12**.

30. Enter the **unit of measure (UOM)**. Click the  icon to see all valid values.

For our example, enter **EA**.

31. For **category code**, click the  icon to see all valid values, and select the closest description.

For our example, enter **62080** for General Writing Types.

32. Enter the **price**, and tab out of the field. The Merchandise Amount will calculate automatically.

For our example, enter **.26**. Notice the Merchandise Amount is calculated to **3.12**.

33. Click the **Save** button to save the requisition.

A Requisition ID is now assigned.

The screenshot shows the 'Maintain Requisitions' form. The 'Requisition ID' field is highlighted with a green box and contains the value '8000044531'. The 'Amount Summary' section shows a 'Total Amount' of '3.12 USD'. At the bottom of the table, a red circle highlights the '+' button, and a blue box with the number '34' is overlaid on it.

Next we are going to add a second line item to be paid by the same account and cost center that paid the first line item. If second line item and second distribution are not needed, skip to Step 45.

34. Scroll to the right on Line 1 and click the **(+)** to insert more lines.

The screenshot shows a dialog box with the text 'dev.my.uh.edu:8139 says' and 'Enter number of rows to add:'. A text input field contains the number '1'. The 'OK' button is circled in red, and a blue box with the number '35' is overlaid on it.



35. Click the **OK** button.

A second line is added to the Form page.

The screenshot shows the 'Maintain Requisitions' form in PeopleSoft. The requisition details include Business Unit 00759, Requisition ID 0000044531, and Requisition Name 0000044531. The status is 'Open' and the budget status is 'Not Chk'd'. The requisition has two lines:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		PEN	12.0000	EA	62080	0.26000	3.12	Open
2		PENCIL SHARPENER	1.0000	EA	60560	5.25000	5.25	Open

Line 2 is highlighted with a red box and labeled '36'. The 'OK' button in the bottom right corner is circled in red and labeled '37'. The total amount for the requisition is 8.37 USD.

36. Enter the following on Line 2:

Description: **PENCIL SHARPENER**

Quantity: **1**

UOM: **EA**

Category Code: **60560**

Price: **5.25**

Now we are going to add a second distribution to Line 2 (Pencil Sharpener). If the second distribution is not needed, skip to Step 45.



37. Click on the **Schedule** button on Line 2.

The Schedule page is displayed.

Form | **Schedule** | Approval | Documents | TIBH Verify

Maintain Requisitions

### Schedule

Business Unit: 00759      Requisition Date: 03/02/2021  
Requisition ID: 0000044531      Status: Open

[Return to Main Page](#)

Line	Item	Quantity	Each	Merchandise Amt	Find	View All	First	2 of 2	Last
2	PENCIL SHARPENER	1.0000	Each	5.25 USD					

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

**Details**

Sched	*Ship To	Quantity	Price	Merchandise Amount	*Due Date	Attention To	Status
1	CB0402A	1.0000	5.25000	5.25	03/02/2021	Scardino, Maria	Active

**38**

Add Ship To Comments

Save   Notify   Refresh      Add   Update/Display

Form | Schedule | Approval | Documents | TIBH Verify

38. Click on the **Distribution** button to access the Distribution Page.

The Distribution page is displayed.

Maintain Requisitions

## Distribution

Requisition ID: 0000044531    Item: PENCIL SHARPENER  
Line: 2    Status: Active  
Schedule: 1  
Ship To: CB0402A    CB0402A    Quantity: 1.0000 EA  
\*Distribute By: Amount    Open Amount: 5.25  
Merchandise Amt: 5.25 USD  
SpeedChart:  Multi-SpeedCharts

**Distributions**

Chartfields | Details | Asset Information | Budget Information

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program
1	Open	100.0000	5.25	00759		53900	2064	C0153	F1086

OK    Cancel    Refresh

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

PC Bus Unit	Project	Bud Ref	Activity	ChartField 1	Affiliate	Fund Affiliate
00759	NA	BP2021				

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39. Scroll to the right and click the (+) to add another distribution line.

A prompt box is displayed prompting for the number of lines to be added:

dev.my.uh.edu:8139 says

Enter number of rows to add:

OK    Cancel

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40. Click the **OK** button.

A second line is added to the Distribution page. Notice, the account and cost center information was copied from the first distribution line.

Maintain Requisitions

Distribution

Requisition ID: 000042830    Item: PENCIL SHARPENER  
 Line: 2    Status: Active  
 Schedule: 1

Ship To: CB0402A    CB0402A    Quantity: 1.0000 EA  
 \*Distribute By: Amount    Open Amount: 5.250  
 Merchandise Amt: 5.25 USD

SpeedChart:  Multi-SpeedCharts

Distributions

Chartfields   Details   Asset Information   Budget Information

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program	PC Bus Unit
1	Open	100.0000	5.25	00759		53900	2064	C0153	F1086	00759
2	Open		0.00	00759		53900	2064	C0153	F1086	00759

OK   Cancel   Refresh

Personalize | Find | View All | First 1-2 of 2 Last

Project	Bud Ref	Activity	ChartField 1	Affiliate	Fund Affiliate		
NA	BP2020					+	-
NA	BP2020					+	-



Maintain Requisitions

Distribution

**Requisition ID:** 000044531    **Item:** PENCIL SHARPENER  
**Line:** 2    **Status:** Active  
**Schedule:** 1  
**Ship To:** CB0402A    CB0402A    **Quantity:** 1.0000 EA  
**\*Distribute By:** Amount    **Open Amount:** 5.250  
**SpeedChart:**  Multi-SpeedCharts    **Merchandise Amt:** 5.25 USD

Distributions

Distrib	Status	Percent	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Dept	Program
1	Open	57.1429	3.00	00759		53900	2064	C0153	F1086
2	Open	42.8571	2.25	00759		53900	2064	C0073	F1054

OK

Cancel

Refresh

41

42

Personalize | Find | View All | | | First | 1-2 of 2 | Last

PC Bus Unit	Project	Bud Ref	Activity	ChartField 1	Affiliate	Fund Affiliate		
00759	NA	BP2021						
00759	NA	BP2021						

41. Update the distribution information on both distribution Lines. The *Percent* is calculated automatically.

For our example, enter the following:

Distribution Line 1:    **Amount – “3.00”**

Distribution Line 2:    **Amount – “2.25”**

**Account – “53900”**

**Cost Center – “2064-C0073-F1054-NA”**

42. Click the **OK** button.





The Schedule page is displayed.

43 [Form](#) [Schedule](#) [Approval](#) [Documents](#) [TIBH Verify](#)

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Maintain Requisitions

Schedule

Business Unit: 00759 Requisition Date: 03/02/2021  
 Requisition ID: 0000044531 Status: Open

43 [Return to Main Page](#)

Line	Item	Quantity	Price	Merchandise Amount	*Due Date	Attention To	Status
2	PENCIL SHARPENER	1.0000 Each		5.25 USD			

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

[Details](#)

Sched	*Ship To	Quantity	Price	Merchandise Amount	*Due Date	Attention To	Status
1	CB0402A	1.0000	5.25000	5.25	03/02/2021	Scardino, Marie	Active

Add Ship To Comments

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

[Form](#) | [Schedule](#) | [Approval](#) | [Documents](#) | [TIBH Verify](#)

43. Go to Form tab or click the **Return to Main Page** hyperlink.







## HOW TO UPLOAD SUPPORTING DOCUMENTATION (Document Imaging)

### READ ONLY:

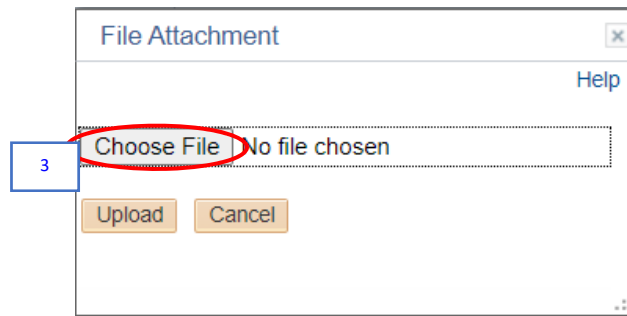
These instructions assume the supporting documentation has already been saved to your computer. When scanning the back up and saving it to the computer, please check each page for correct orientation. Documentation that is not oriented correctly, with the ability to read top-down and left-to-right, is subject to denial of the voucher.

The screenshot displays the PeopleSoft Requisition Workflow interface. At the top, there are navigation tabs: Form, Schedule, Approval, Documents (highlighted with a red box and labeled '1'), and TIBH Verify. Below the tabs, the following information is displayed: Business Unit: 00759, Requisition Date: 03/02/2021, Requisition ID: 0000044531, and Status: Open. A link for 'Print Requisition Coversheet' is also visible. Below this information is a section titled 'Requisitions Document Images'. In this section, there is a checkbox labeled 'Display Active Documents Only' which is checked. To the right of this checkbox is a button labeled 'Add New Document' (circled in red and labeled '2'). At the bottom of the interface, there are several buttons: Save, Return to Search, Notify, Refresh, Add, and Update/Display. A breadcrumb trail at the bottom reads: Form | Schedule | Approval | Documents | TIBH Verify.

1. Go to the **Documents** tab.
2. Click the **Add New Document** button.

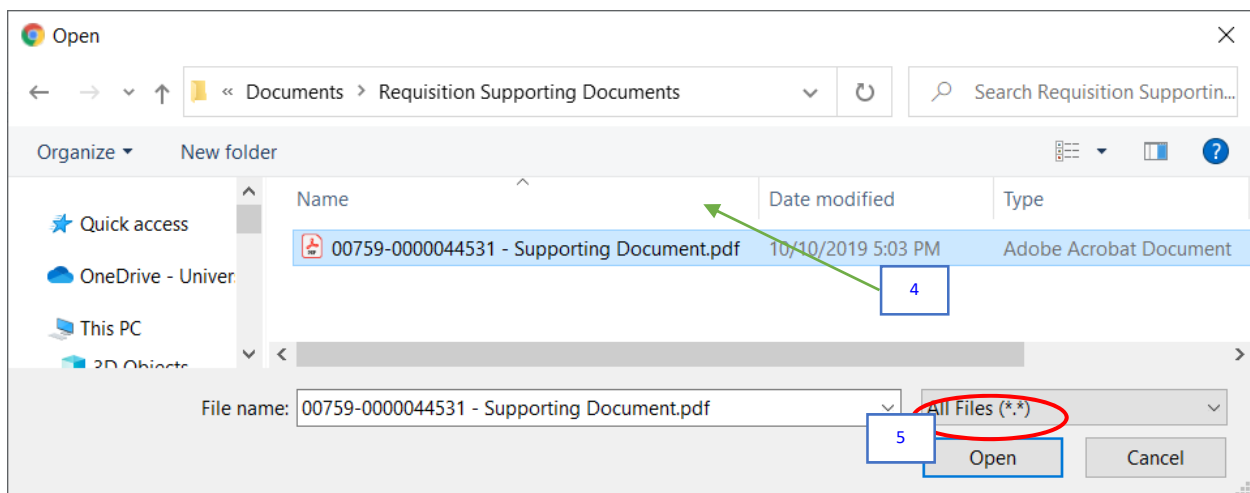


The Document Upload box is displayed.

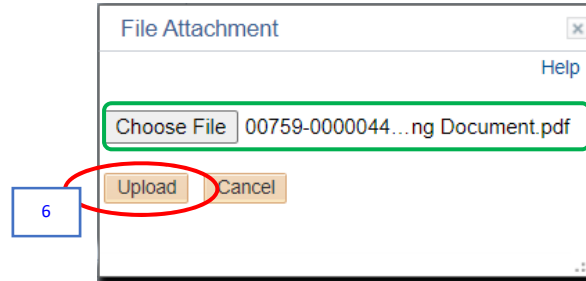


3. Click the **Choose File** button.

The Choose File dialogue box is displayed.



4. Navigate to where the supporting documentation is saved and select it.
5. Click the **Open** button.



6. Click the **Upload** button.

The supporting documentation will be attached to the requisition.

Form | Schedule | Approval | **Documents** | TIBH Verify

**Business Unit:** 00759      **Requisition Date:** 03/02/2021  
**Requisition ID:** 0000044531      **Status:** Open  
[Print Requisition Coversheet](#)

### Requisitions Document Images

Display Active Documents Only      [Add New Document](#)

Scroll Area      Find | View All      First 1 of 1 Last

Security Flag      [Details](#)

**Active Status:** Active

**Sequence Nbr:** 1


**Created By:** 8006680      Scardino, Maria Cecilia Entico  
**Create Date/Time:** 03/02/2021 12:22:51PM  
**Last Update User ID:** 8006680      Scardino, Maria Cecilia Entico  
**Last Update Date/Time:** 03/02/2021 12:22:51PM

**Rendition Type:** PDF

[Save](#)   [Return to Search](#)   [Notify](#)   [Refresh](#)   [Add](#)   [Update/Display](#)



**NOTE:**

- Always open the attachment by clicking the  icon to make sure it is viewable. The auditors will examine the image when they are performing an audit. Also, make sure the document is oriented correctly so it is readable.
- Limit the documents uploaded to what is required.
- Also, if any security sensitive information is uploaded to the requisition, the requisition will be denied so it can be deleted. Example of security sensitive information includes social security number, credit card number and checking account number. A new requisition will need to be created in its place.
  - Good document types for uploading are .pdf, .xls, .doc and .rtf. Do not use .txt or .tif document types. The requisition will be denied if these document types are attached.
- Uploaded documents cannot be deleted. They can only be made inactive on the *Document Status* field.


Form
Schedule
Approval
Documents
TIBH Verify

**Business Unit:** 00759      **Requisition Date:** 03/02/2021  
**Requisition ID:** 0000044531      **Status:** Open  
[Print Requisition Coversheet](#)

**Requisitions Document Images**

Display Active Documents Only
 Add New Document

**Scroll Area** Find | View All    First ◀ 1 of 1 ▶ Last



Security Flag  
**Active Status:** Active  
**Sequence Nbr:**  
**Created By:** Active  
**Create Date/Time:** 03/02/2021 12:22:51PM  
**Last Update User ID:** Inactive  
**Last Update Date/Time:** 03/02/2021 12:22:51PM

Scardino, Maria Cecilia Entico

Scardino, Maria Cecilia Entico

**Rendition Type** PDF

Save
Return to Search
Notify
Refresh
Add
Update/Display

Form
Schedule
Approval
Documents
TIBH Verify



The requisition is now ready to be entered into workflow.

Next, we will prepare to enter the requisition into workflow. Please continue reading about how the requisition workflow process works and then you will enter the requisition you created into workflow.

## HOW REQUISITION WORKFLOW WORKS

Requisition workflow is an electronic routing and approval process for requisitions. After a requisition is created, it is entered into workflow and moves to the next approval level electronically. Once the requisition reaches the final approval level which is Purchasing and is approved by them, the Purchasing Office is ready to turn the requisition into a Purchase Order. Once the Purchase Order has been created, the next step is to place the order.

### Key Elements of Requisition Workflow

- Once a requisition is placed in workflow, only the person who put the requisition into workflow can change it.
- Approvals by the:
  - requisition creator
  - college/division approver (Division Business Administrator)
  - intermediate approver (OSP, UCT, and Provost)
  - final approver (Purchasing)are electronically captured in the PeopleSoft Finance system. The approval history can be reviewed on the Approval page or the Requisition Coversheet.
- If additional approval is required, the requisition coversheet should be printed and signatures obtained. Then scan and upload the requisition coversheet to the requisition as supporting documentation.
- Requisition information, including approval history and backup documentation, can be obtained from the Documents page.





## Requisition Workflow Security Roles

You will be assigned with one of the following security roles:

1. Requisition Creator – Create requisitions, select the appropriate route, and submit the requisition into workflow. The requisition will be sent to the College/Division approver worklist.
2. College/Division Approver (Division Business Administrator) – Approve requisitions. The College/Division approver can also create requisitions and place them into workflow. The requisitions will be sent to the Intermediate Approvers' worklist or the Final Approvers' worklist depending upon the Approval Route selected.
3. Intermediate Approver (OSP, UCT, or Provost Office) – Approve requisitions as required by university policy.
4. Final Approver (Purchasing) – Approve requisitions for processing into Purchase Orders.

## Approval Routes (Paths)

When a requisition is submitted into workflow, an appropriate approval route (path) must be chosen. The available routes (paths) are:

1. Dept/Coll/Div → Purchasing – this path is for Requisitions that do not involve contract and grant funds, Provost funds, or computing items.
2. Dept/Coll/Div → OCG → Purchasing – this path is for Requisitions ordered from contract and grant cost centers.
3. Dept/Coll/Div → Provost → Purchasing – this path is for Requisitions ordered from Provost cost centers. Change the "Source" to PRV, so the requisition will go to the Provost Division Business Administrator and then on to the Intermediate Approver.
4. Dept/Coll/Div → UCT → Purchasing – this path is for Requisitions where computing items are being ordered. NOTE: IF A COMPUTING ITEM IS BEING ORDERED FROM A GRANT OR PROVOST COST CENTER, PRINT THE COVERSHEET, OBTAIN THE UCT SIGNATURE APPROVAL MANUALLY, UPLOAD THE SIGNED COVERSHEET, AND CHOOSE THE OCG OR UCT PATH.



## Approval Actions

Use the Requisition Approval page when a requisition is submitted into workflow or needs to be approved. There are three approval actions:

1. Approve – select “Approve” to send the requisition to the next approvers worklist.
2. Deny – select “Deny” to send the requisition back to the person who originally put it into workflow.
3. Recycle – select “Recycle” to send the requisition back to the person who sent it to your worklist.

## Requisition Worklist

1. WF\_REQ\_CREATOR – this is the creator security role. This role is assigned to the person who normally initiates the Requisition into workflow.
2. WF\_REQ\_COLLDIV – this is the college/division security role. This role is assigned to the person at the first level of approval (i.e. Division Business Administrator).
3. WF\_REQ\_INTERMEDIATE – this is the intermediate security role. This role is assigned to a secondary level of approval before the Requisition reaches Purchasing. Currently, this approval level is for the Provost Office, Research and UCT.
4. WF\_REQ\_FINAL – this is the final security role. This role is assigned to the individuals who have final approval authority for the Requisition within Purchasing.

## Source

Each department is mapped to a source. The source determines the College/Division Approver’s worklist the requisition will be sent. It defaults to the source mapped to the user’s department. It must be



updated accordingly if the requisition is to be redirected to another College/Division approver.



**THIS IS THE END OF THE “READ ONLY” SECTION. WE ARE NOW READY TO ENTER THE REQUISITION INTO WORKFLOW.**

## ENTERING THE REQUISITION INTO WORKFLOW

Form | Schedule | **Approval** | Documents | TIBH Verify

Business Unit: 00759      Requisition Date: 03/02/2021  
Requisition ID: 0000044531      Status: Open

**Route To**  
Please select the appropriate approval path:  
 Dept/Coll/Div - Purchasing Office  
 Dept/Coll/Div - OCG - Purchasing Office  
 Dept/Coll/Div - Provost - Purchasing Office  
 Dept/Coll/Div - UCT - Purchasing Office

**Source**  
Department C0129  
Source ACC - Accounting

**Approval**  
Approval Instance  
Approval Status  
Approval Action Approve  
Apply

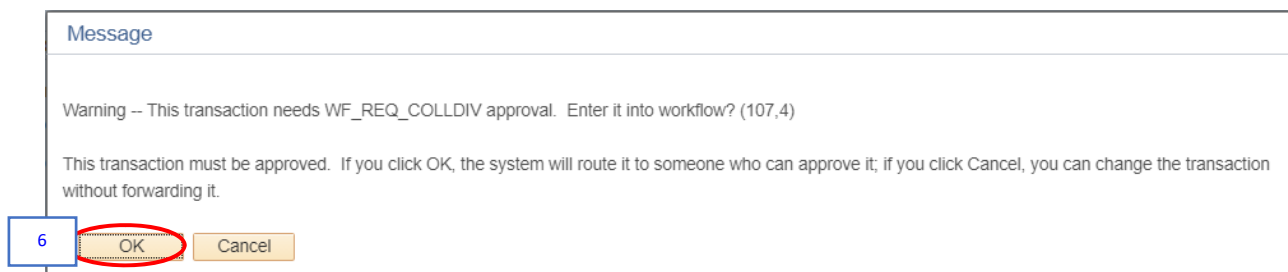
**Workflow Fields**  
Business Unit 00759  
Requisition ID 0000044531  
OperID 8006680

1. Go to the **Approval Log** tab.
2. Select the **Approval Path**. For our example, choose the first path “**Dept/Coll/Div – AP.**”
3. Change the **Source** **ONLY IF** the requisition is being redirected for approval of a different College/Division approver. For our example, **DO NOT** change the **Source**.
4. Select the **Approval Action**. For our example, select “**APPROVE.**”



5. Click the **Apply** button.

A message box pops up indicating the requisition needs to be approved by the next Approver.



6. Click **OK** button.



The requisition is now in workflow. The Comment History and Approval Log sections show your name/user ID indicating the requisition was submitted by you into workflow.

Form | Schedule | Approval | Documents | TIBH Verify

**Business Unit:** 00759      **Requisition Date:** 03/02/2021

**Requisition ID:** 0000044531      **Status:** Open

**Route To**

\*Please select the appropriate approval path:

- Dept/Coll/Div - Purchasing Office
- Dept/Coll/Div - OCG - Purchasing Office
- Dept/Coll/Div - Provost - Purchasing Office
- Dept/Coll/Div - UCT - Purchasing Office

**Source**

**Department** C0129

**Source** ACC - Accounting

**Workflow Fields**

**Business Unit** 00759

**Requisition ID** 0000044531

**OperID** 8006680

**Approval**

**Approval Instance** 3725757

**Approval Status** Pending

**Approval Action** Approve

**Comment Log**

03-03-21 11:47 AM : Dept/Coll/Div - Purchasing Office : Approve : Scardino, Maria Cecilia Entico:

**Add Comment**

**Approval History**

Step	Status	Date/Time Stamp	User ID	Name
	Initiated	03/03/21 11:47:17AM	8006680	Scardino, Maria Cecilia Entico
Step 1	Pending	03/03/21 11:47:17AM		
Step 2	Pending	03/03/21 11:47:17AM		

Form | Schedule | Approval | Documents | TIBH Verify

**YOUR REQUISITION HAS NOW BEEN ENTERED INTO WORKFLOW.**

**NOTE:** If your requisition is denied because the cost center and/or account need to be changed, you must make the change and re-budget check the requisition. Once you have a **“Valid”** Budget Status, enter the requisition into workflow again.


## HOW TO SETUP YOUR WORKLIST

Worklists are used to consolidate all transactions needing your attention. They are grouped by module.

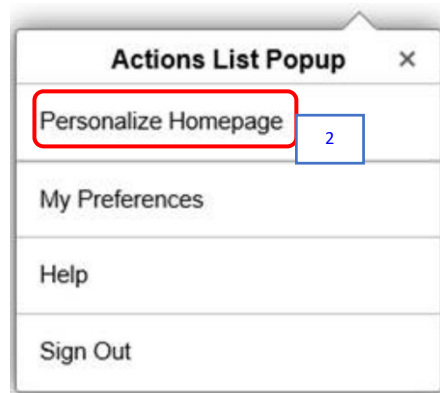
- If you are an approver, any new transaction needs your review for approval will show in your worklist.
- If you are a creator/initiator, any transaction denied by the approver will show in your worklist.

To setup your worklist, follow the following steps:



1. Click the **Actions List**  icon on the upper right hand side of the page.

The Actions List menu is displayed.



2. Click on **Personalize Homepage**.

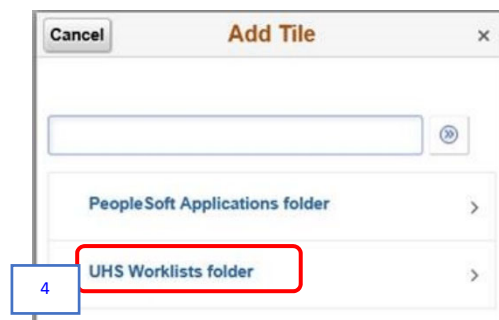


The Personalize Homepage is displayed.



3. Click the **Add Tile** button.

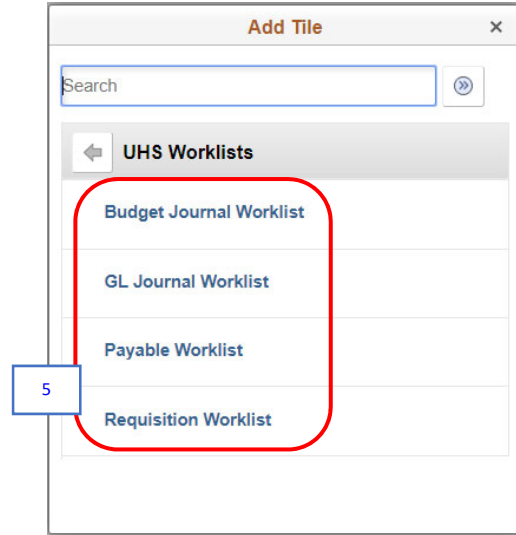
The Add Tile menu is displayed.



4. Click on **UHS Worklists folder**.

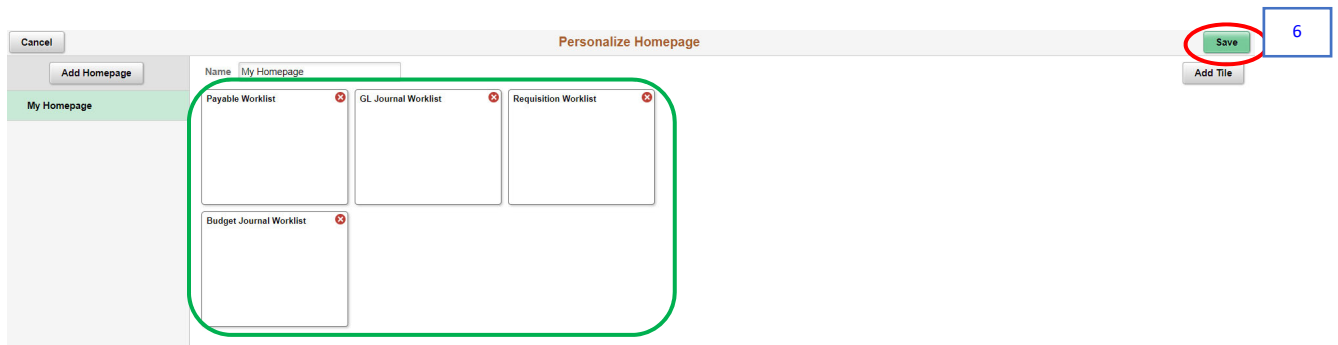
The available worklist tiles displayed are based on the transactions you have access to.

- Vouchers – Payable Worklist
- GL Journals – GL Journal Worklist
- Requisition – Requisition Worklist
- Budget Journal – Budget Journal Worklist



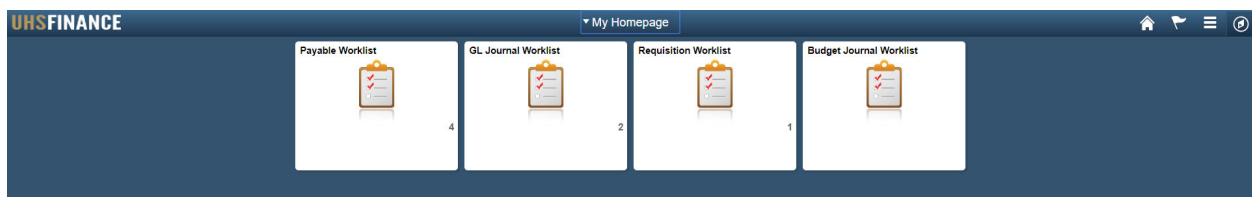
5. Select all the worklists.

The selected worklists are displayed on the Personalize Homepage.



6. Click the **Save** button.

The worklists are now displayed on your Homepage.







NOW YOU ARE GOING TO FIND AND PRINT OUT THE REQUISITION YOU JUST ENTERED INTO WORKFLOW.

## HOW TO FIND AND PRINT THE REQUISITION

1

2

Business Unit: 00759

Requisition ID: NEXT

Add

Find an Existing Value | Add a New Value

1. Navigate to **Main Menu > Purchasing > Requisitions > Add/Update Requisitions.**

2. Click the **Find an Existing Value** tab.

The Find an Existing Value tab is displayed.

## Requisitions

Use the following search to look for an existing Requisition.

**Find an Existing Value** [Add a New Value](#)

▼ **Search Criteria**

Business Unit:	= ▼	00759	🔍
Requisition ID:	begins with ▼		🔍
Requisition Name:	begins with ▼		🔍
Requisition Status:	= ▼		▼
Origin:	begins with ▼		🔍
Requester:	begins with ▼		🔍
Requester Name:	begins with ▼		🔍
Hold From Further Processing		<input type="checkbox"/>	
<input type="checkbox"/> Case Sensitive			

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

3. Enter the **Requisition ID**.



4. Click the **Search** button.

Form | Schedule | Approval | **Documents** | TIBH Verify

Business Unit: 00759 5 Requisition Date: 03/02/2021  
Requisition ID: 0000044531 Status: Open

6 Print Requisition Coversheet

### Requisitions Document Images

Display Active Documents Only Add New Document

Scroll Area Find | View All First ◀ 1 of 1 ▶ Last

Security Flag Details

Active Status: Active

Sequence Nbr: 1

Created By: 8006680 Scardino, Maria Cecilia Entico  
Create Date/Time: 03/02/2021 12:22:51PM

Last Update User ID: 8006680 Scardino, Maria Cecilia Entico  
Last Update Date/Time: 03/02/2021 12:22:51PM

Rendition Type: PDF

Save Return to Search Notify Refresh Add Update/Display

Form | Schedule | Approval | Documents | TIBH Verify

5. Go to **Documents** tab.



6. Click the **Print Requisition Coversheet** hyperlink.

The PDF format of requisition opens in a new window.



## Requisition Coversheet

Requisition # 0000044531

<b>Business Unit:</b>	00759	<b>Requestor:</b>	8006680 Scardino, Maria Cecilia Entico
<b>Dept. Name:</b>	GA/FINANCE NOAII-1500	<b>Requestor Ph #:</b>	
<b>Address:</b>	2700 BAY AREA BLVD		
<b>Vendor ID:</b>	0000156940		
<b>Name:</b>	CHIN, OTT		
<b>Address:</b>	1 8700 Long Point Road Ste 205 Houston TX 77055-3054 USA		
<b>Phone:</b>		<b>Fax:</b>	

**Gross Amount:** \$8.37

**Budget Check:** Valid

Line#	Account	Fund	Dept ID	Program	Project	Budget Ref	Chartfield1	Amount	Due Date
1-1-1	53900	2064	C0153	F1086	NA	BP2021		3.12	03/02/2021
2-1-1	53900	2064	C0153	F1086	NA	BP2021		3.00	03/02/2021
2-1-2	53900	2064	C0073	F1054	NA	BP2021		2.25	03/02/2021

Line#	Category	Description	Quantity	UOM	Price	Ext. Amount
1	62080	PEN This is a test requisition.	12.0000	EA	0.26000	3.12
2	60560	PENCIL SHARPENER	1.0000	EA	5.25000	5.25

The order was placed by U. R. Fine for supplies required for a training class. Please contact John at 281-283-9999 if there are any questions. This quote was given by R. A. Way from Chin, Ott.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Prepared By:** 8006680 Scardino, Maria Cecilia Entico **Date:** 03/02/2021

Approval History				
Step	Status	Date Timestamp	User ID	Name
0	I	3/3/2021 11:47 AM	8006680	Scardino, Maria Cecilia Entico
01	P	3/3/2021 11:47 AM		
02	P	3/3/2021 11:47 AM		

**Comments**

03-03-21 11:47 AM : Dept/Coll/Div - Purchasing Office : Approve : Scardino, Maria Cecilia Entico: