



ePro Requisitioning Changes version 8.8 to version 9.0

8.8

The screenshot shows the PeopleSoft 8.8 interface. On the left is a navigation menu with 'eProcurement' expanded to 'Buyer Center', where 'Create Requisition' is selected. Below the menu is a 'Requisition Summary' box with the text: 'There are no lines on this request. Please add new line in order to save this requisition. Total Lines: 0, Total Cost (0): 0'. The main content area is titled 'Create Requisition' and features a breadcrumb trail: 'Settings -> Find Items -> Modify Shipping -> Modify Accounting -> Review and Submit'. Below this is a 'Request Defaults' section with the following fields: '*Business Unit:' with a dropdown set to 'UMSYS' and a search icon, displaying 'Columbia'; '*Requester:' with an empty dropdown and search icon; 'Requisition Name:' with an empty text field; and 'Currency' with a dropdown set to 'USD'. At the bottom of this section are 'Continue' and 'Cancel' buttons.

The main difference between 8.8 and 9.0 on the initial Create Requisition page is the appearance.

In 9.0 you enter a Requisition Name on another page after the Business Unit and Requester are entered.

9.0

The screenshot shows the PeopleSoft 9.0 interface. The navigation menu on the left is similar to 8.8, but 'Create Requisition' is highlighted. The 'Requisition Summary' box contains the same text as in 8.8. The main content area is titled 'Create Requisition' and has a sub-header 'Specify Business Unit and Requester'. The fields are: '*Business Unit:' with a dropdown set to 'UMSYS' and a search icon, displaying 'System Administration'; '*Requester:' with an empty dropdown and search icon; and an 'OK' button at the bottom.

8.8



In 8.8 you chose the Override Option on the Settings page to override the chartfield and ship to code defaults associated with your UserID and/or split fund. That is not necessary in 9.0.

The Define Requisition page in 9.0 contains the default fields. Expand the Line Defaults by clicking the arrow. Making changes on Define Requisition page is optional, so you could skip expanding Line Defaults and click Continue.

9.0

PeopleSoft

Home | Worklist | Mult

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: UMSYS System Administration

Requester: BREWERMJ Brewer, Marcia J *Currency: USD

Requisition Name:

Line Defaults

Continue

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

PeopleSoft Home Worklist Mult

Menu

- ▼ eProcurement
 - ▷ Buyer Center
 - ▷ Manage ERP Integration
 - Create Requisition
 - Manage Requisitions
 - UM Print Requisition
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center

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

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: UMSYS System Administration *Currency: USD

Requester: BREWERMJ Brewer, Marcia J

Requisition Name: 9.0 ePro Req

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

Vendor: **Vendor Location:**

Buyer: **Category:** **Unit of Measure:**

Shipping Defaults

Ship To: C04915 **Due Date:** **Attention:**

Accounting Defaults

ChartFields

Location	GL Unit	Account	Fund	Dept	Program	Class	PC Bus Unit	Project
C04915	UMSYS	730000	0000	A1106003	0	0	UMSYS	00

Continue

Data entry on this page is optional. For a non-catalog requisition, you can enter the buyer name, category, and unit of measure, which will be carried over to each line item as long as you make changes here first before entering any line items.

It is NOT recommend making chartfield changes here because you cannot use MoCode and cannot split-fund.

8.8



The Find Items page in 8.8 now changes to Add Items and Services in 9.0. The appearance is slightly different, but the type of items you can enter remain the same: Non-Catalog Items, Catalog Items, and Template Items.

The information contained in the Catalog and Templates tabs has not changed.

9.0

PeopleSoft. Home | Worklist | MultiC

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: [] Search

Templates | Catalog | **Non-Catalog**

Order Goods and/or Services Not Available in Item Catalog

*Item Description: Conference Table

*Price: 2500 *Currency: USD

*Quantity: 1 *Unit of Measure: ea

*Category: 00001 Due Date: []

Vendor ID: []

Vendor Item ID: []

Mfg ID: []

Mfg Item ID: []

Additional Information

[] Send to Vendor [] Show at Receipt [] Show at Voucher

Add Item Cancel

Some fields on the non-catalog item tab changed position, but the required fields remain the same: Item Description, Price, Quantity, Unit of Measure, and Category.

Do not enter Vendor ID, Vendor Item ID, Mfg ID, and Mfg Item ID. To identify the vendor to be used on the bid/order, enter it in the Justification Comments on the Review and Submit page.

Additional Information is an area to enter comments that are specific to the line item being entered.

8.8



The Review and Submit page changed slightly from 8.8 to 9.0.

The Modify Shipping and Modify Accounting links at the top of the page and the Shipping and Accounting buttons below the line item in 8.8 changed to a single button called Modify Line/Shipping/Accounting under the line items in 9.0.

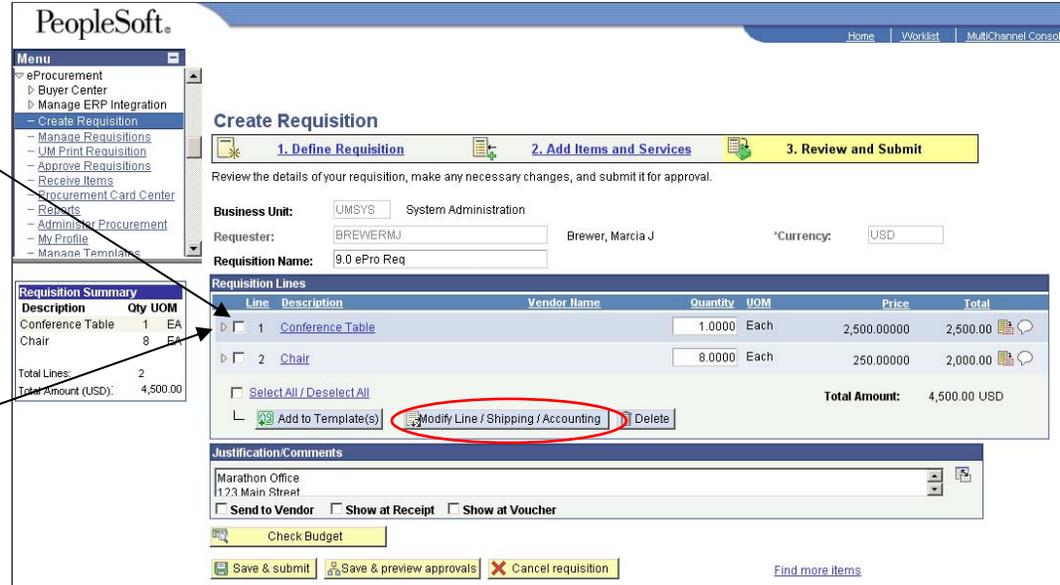
9.0

You can access line distribution information in two ways.

1. Select the line items to be changed by clicking in the box to the left and click the Modify Line/Shipping/Accounting button; you can select more than one line if the changes you will make apply to all of the selected lines.

OR

2. Click the arrow on the far left of the line to expand the line section, which contains information applicable only to that individual line.



9.0

This is the Modify Line/Shipping /Accounting page for the selected lines from the Review and Submit page. You can split fund selected lines and use MoCode for each distribution line. The MoCode entered is not retained in the field after the requisition is saved. Account is not part of MoCode, so you must enter an account.

Caution: When line items are created, they are assigned the default chartfield and Ship To values from the Define Requisition page. The defaults will not appear on this page, so if you want to use the Line Default Values from the Define Requisition page and split fund with another chartfield string/MoCode, you can click Load Line Default Values from Define Requisition Page hyperlink to populate the row and then make applicable changes. After changes are made on this page, do NOT return to this page to verify/review the changes made. Each time you access this page, it will be blank. Another page is used to verify/review chartfield and Ship To code values associated with each individual line.

PeopleSoft

Home Worklist MultiChannel Consc

Menu

- eProcurement
 - Buyer Center
 - Manage ERP Integration
 - Create Requisition
 - Manage Requisitions
 - UM Print Requisition
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center

Create Requisition

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To:

Due Date: Attention:

ChartFields

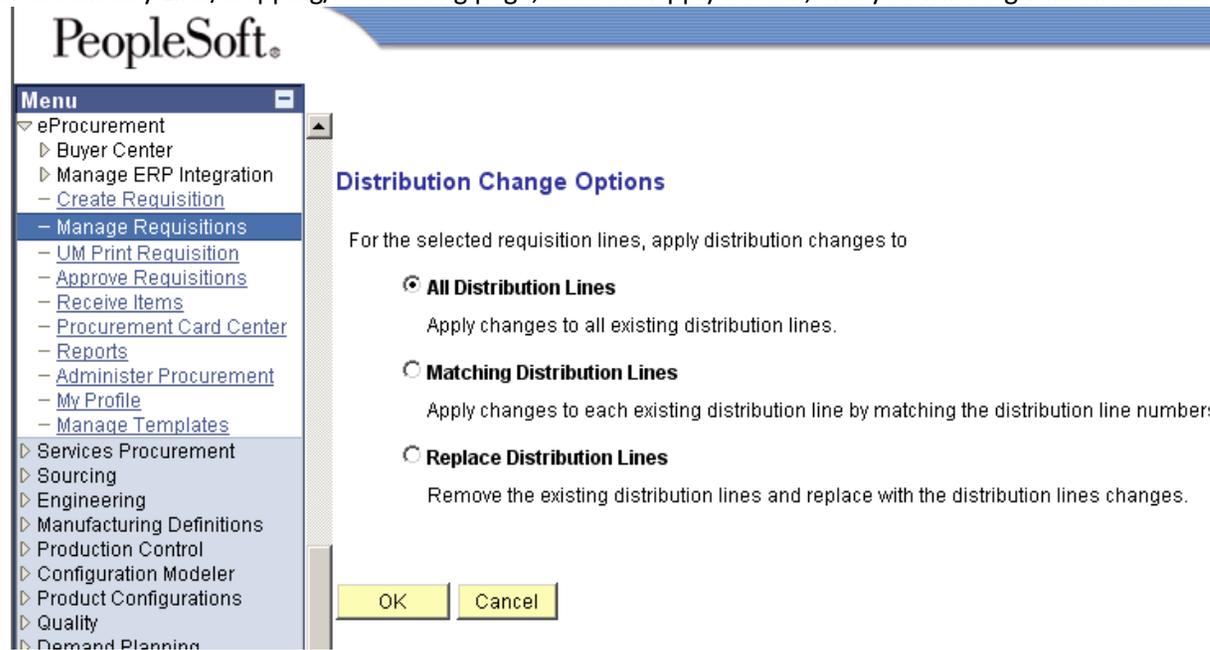
MoCode	Percent	Location	GL Unit	Account	Fund	Dept	Program	Class	Project
1	<input type="text"/>								

[Load Line Default Values from Define Requisition Page](#)

Apply Cancel

9.0

After making changes on the Modify Line/Shipping/Accounting page, click the Apply button, and you will be given three choices...



All Distribution Lines: Use to apply field changes from what was originally populated in the field(s) for the selected lines. This will only affect the fields that are modified.

Matching Distribution Lines: DO NOT USE THIS OPTION

Replace Distribution Lines: Use to replace all of the existing distribution information with what was entered on the Modify Line/Shipping/Accounting page. This should only be used if you are replacing all fields with new values to be applied to all selected lines.

EXAMPLE: If you only want to change the account for selected items on the Modify Line/Shipping/Accounting page but not all other chartfield fields, you would make the change to the account field, leave the other chartfield fields blank, click Apply, and then choose All Distribution Lines – the new account will be reflected on the line item and all other fields would be unchanged. If instead you choose Replace Distribution lines, the account field would be changed and all other chartfield fields except the DeptID would be blank on the selected lines, resulting in an incomplete requisition that cannot be saved.

CAUTION: You cannot use Modify Line/Shipping/Accounting to make changes if you previously split funded the line. To make changes to a line that has been split funded, you must do it on the individual line as explained next.

9.0

This page shows the line section expanded for line item 1 after clicking the arrow on the far left of the line (this function replaces the “truck” icon used in 8.8 to make changes to an individual line). Changes made in the expanded line section only apply to that individual line item. You can also use MoCode and add additional distribution lines to split fund. The MoCode entered is not retained in the field after the requisition is saved. Account is not part of MoCode, so you must enter an account.

The expanded line section can be used to verify if changes made using the Modify Line/Shipping/Accounting button were applied to the line(s) correctly.

Create Requisition

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

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UMSYS System Administration
Requester: BREWERMJ Brewer, Marcia J ***Currency:** USD
Requisition Name: 9.0 ePro Req

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Conference Table		1.0000	Each	2,500.00000	2,500.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 **Due Date:** **Quantity:** 1.0000
Status: Active ***Ship To:** C04915
Attention: Brewer, Marcia J

***Distribute by:** Qty ***Liquidate by:** Amt

Accounting Lines

Line	MoCode	Status	*Location	Quantity	Percent	Amount	GL Unit	Account	Fund	Dept	Program	Class	PC Bus Unit	Project
1		Open	C04915	1.0000	100.0000	2,500.00	UMSYS	730000	0000	A1106003	0	0	UMSYS	00

Select All / Deselect All **Total Amount:** 4,500.00 USD

Justification/Comments

Marathon Office
123 Main Street

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

8.8

PeopleSoft®

Menu

Search:

- My Favorites
- UM Applications
- Sat Up Financials/Supply Chain
- Accounts Payable
- Commitment Control
- General Ledger
- Purchasing
- Manager Self-Service
- Items
- Vendors
- eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions**
 - UM Print Requisition
 - Manage Approvals
 - Receive Items
 - Procurement Card Center
 - Reports
 - Manage Templates
- Services Procurement
- Employee Self-Service
- Supplier Contracts
- Data Exchanges
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools

8.8 Manage Requisitions included icons at the end of each row for various actions for a specific requisition.

9.0 Manage Requisitions changed to a Select Action drop-down menu instead of icons.

Not all actions are available; what you will see is dependent on the status of the requisition and the security rights associated with your UserID.

Manage Requisitions

Find a Requisition

Req Name ID: Business Unit: Find

Requester: Date From: Thru Date:

More Find Options

Requisition Name	Req ID	Bus. Unit	Date	Status	Budget	Total	
8.8 ePro Req	0000003596	UMSYS	10/30/2008	Open	Not Chk'd	4,500.00 USD	
0000003595	0000003595	UMSYS	10/27/2008	Approved	Valid	1,568.00 USD	
0000003594	0000003594	UMSYS	10/27/2008	Approved	Valid	560.60 USD	
COPIER	0000003593	UMSYS	10/23/2008	Pending	Not Chk'd	1,151.61 USD	
SAMPLE	0000003592	UMSYS	10/23/2008	Pending	Not Chk'd	200.00 USD	
0000003591	0000003591	UMSYS	10/21/2008	PO(s) Dispatched	Valid	352.40 USD	
Test corp express & off...	0000003590	UMSYS	10/21/2008	PO(s) Dispatched	Valid	309.02 USD	
Office Supplies	0000003589	UMSYS	10/15/2008	Pending	Not Chk'd	178.87 USD	
Lab-RBM60-supplies	0000003588	UMSYS	10/15/2008	Pending	Not Chk'd	10.00 USD	
0000003587	0000003587	UMSYS	09/30/2008	PO(s) Dispatched	Valid	1,400.00 USD	

9.0

PeopleSoft®

Menu

- eProcurement
 - Buyer Center
 - Manage ERP Integration
 - Create Requisition
 - Manage Requisitions**
 - UM Print Requisition
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center
 - Reports
 - Administer Procurement
 - My Profile
 - Manage Templates
- Services Procurement
- Sourcing
- Engineering
- Manufacturing Definitions
- Production Control
- Configuration Modeler
- Product Configurations
- Quality
- Demand Planning
- Inventory Policy Planning
- Supply Planning
- Program Management
- Proposal Management
- Maintenance Management
- Resource Management
- Lease Administration
- Staffing
- Travel and Expenses
- Travel Administration
- Employee Self-Service
- eSettlements
- IT Asset Management
- Cash Management
- Deal Management

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To:

Requester: Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000004374	9.0 ePro Req	UMSYS	10/30/2008	Open	Not Chk'd	4,500.00 USD	<Select Action...> Go
0000004373	9.0 ePro Req	UMSYS	10/28/2008	Open	Not Chk'd	4,500.00 USD	<Select Action...> Go
0000004372	LINEN CLEANING	UMSYS	10/28/2008	Approved	Valid	31,200.00 USD	Cancel Requisition Check Budget Copy Requisition Edit Requisition Go
0000004371	LINEN CLEANING	UMSYS	10/28/2008	Approved	Valid	36,000.00 USD	<Select Action...> Go
0000004370	ATHLETIC SHORTS	UMSYS	10/28/2008	Approved	Valid	1,000.00 USD	<Select Action...> Go
0000004369	REQUESTER	UMSYS	10/28/2008	Approved	Valid	5,000.00 USD	<Select Action...> Go
0000004368	REQ SUPPLIES	UMSYS	10/28/2008	Approved	Valid	108.90 USD	<Select Action...> Go

8.8

- My Favorites
- UM Applications
- Set Up Financials/Supply Chain
- Accounts Payable
- Commitment Control
- General Ledger
- Purchasing
- Manager Self-Service
- Items
- Vendors
- eProcurement
- Buyer Center

Manage Requisitions

Find a Requisition

Req Name/ID: Business Unit: UMSYS

Requester: Date From: Thru Date:

More Find Options

Requisition Name	Req ID	Bus. Unit	Date	Status	Budget	Total
8.8 ePro Req	0000003596	UMSYS	10/30/2008	Open	Not Chk'd	4,500.00 USD

8.8

- PeopleSoft
- Menu
- Search:
- My Favorites
 - UM Applications
 - Set Up Financials/Supply Chain
 - Accounts Payable
 - Commitment Control
 - General Ledger
 - Purchasing
 - Manager Self-Service
 - Items
 - Vendors
 - eProcurement
 - Buyer Center
 - Create Requisition
 - Manage Requisitions**
 - UM Print Requisition
 - Manage Approvals
 - Receive Items
 - Procurement Card Center
 - Reports
 - Manage Templates
 - Services Procurement
 - Employee Self-Service
 - Supplier Contracts
 - Data Exchanges
 - Worklist
 - Tree Manager
 - Reporting Tools
 - PeopleTools

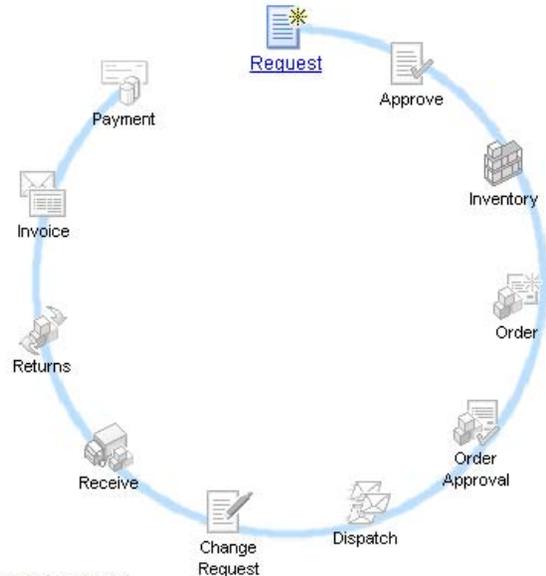
Requisition Cycle for: Brewer, Marcia J

Business Unit: UMSYS

Requisition Name: 8.8 ePro Req

Date Entered: 10/30/2008

Date Last Changed: 10/30/08 4:44:34PM



[Manage Requisitions](#) [Manage Approvals](#)

A requisition row in 8.8 Manage Requisitions included an icon to access the Requisition Cycle also known as the Circle of Life, which provided information on the various stages of the request as it moved through the system.

- Menu
- ▼ eProcurement
 - ▷ Buyer Center
 - ▷ Manage ERP Integration
 - Create Requisition
 - Manage Requisitions
 - UM Print Requisition
 - Approve Requisitions
 - Receive Items
 - Procurement Card Center
 - Reports
 - Administer Procurement
 - My Profile
 - Manage Templates
- ▷ Services Procurement
- ▷ Sourcing
- ▷ Engineering
- ▷ Manufacturing Definitions
- ▷ Production Control
- ▷ Configuration Modeler
- ▷ Product Configurations
- ▷ Quality
- ▷ Demand Planning
- ▷ Inventory Policy Planning
- ▷ Supply Planning
- ▷ Program Management
- ▷ Proposal Management
- ▷ Maintenance Management
- ▷ Resource Management
- ▷ Lease Administration
- ▷ Staffing
- ▷ Travel and Expenses
- ▷ Travel Administration
- ▷ Employee Self-Service
- ▷ eSettlements
- ▷ IT Asset Management
- ▷ Cash Management
- ▷ Deal Management
- ▷ Risk Management

In 9.0 Manage Requisitions, the various stages of the request are shown in the Request Lifespan that is accessible by clicking on the arrow on the left of a requisition ID to expand the detail. If information is available for a particular stage, the image name is an active hyperlink.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:
Requisition Name:

Requisition ID:
Request Status:
Budget Status:

Date From:
Date To:

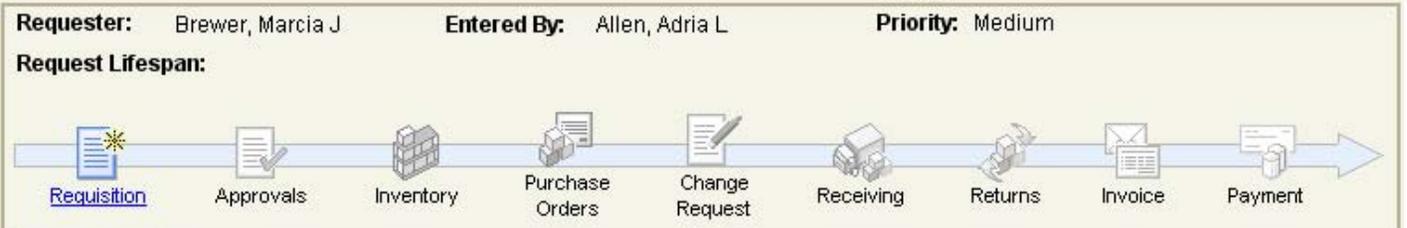
Requester:
Entered By:
PO ID:

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▶

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Reg ID	Requisition Name	BU	Date	Status	Budget	Total	
▼ 0000004374	9.0 ePro Req	UMSYS	10/30/2008	Open	Not Chk'd	4,500.00USD	<Select Action..> <input type="button" value="Go"/>



Line Information

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	Conference Table	Open	2,500.00000	USD	1.0000	EA	
2	Chair	Open	250.00000	USD	8.0000	EA	