

Today's Agenda



- **Why Update the Process**
- **Editing a Requisition**
 1. Before a PO is created
 2. After a PO is created
 3. After PO is dispatched
- **Reviewing Change Request Information**
- **Questions**

Why Update the Process

The benefits of using the Change Request feature in PeopleSoft:

- More efficient than sending an email to the Buyer requesting them to manually change the Purchase Order.
- Keeps the Requisition and the Purchase Order in sync, avoiding confusion.
- The Change Request has built in approval: same set of Approval Workflow for changing a requisition as creating a requisition with an increase or decrease in price or quantity.
- Use the Change Request icon to review the changes made to any requisition. It enables you to view the details about each change, the identity of the user who made the change, and when the change was made. One requisition could be changed multiple times and you can view each change.

Editing a Requisition

- To make a change go to the Manage Requisition Page:

Navigation: Main Menu → eProcurement → Manage Requisitions

1000014063 APHA USC01 12/14/2015 PO(s) Created Valid 2,640.00 U

Requester Debra Brown Entered By Debra Brown Priority Medium
Pre-Encumbrance Balance 0.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:
Line Information Personalize | Find | [Print] | [Grid] First 1 of 1 Last

Line	ePro Special Request Item	Advertisement for faculty po...	PO Created	Price	Quantity	UOM	Supplier	
1		Advertisement for faculty po...	PO Created	2640.00000 USD	1.0000 EA		AMERICAN PUBLIC HEALTH ASSOCIATION	

Editing a Requisition

The changes are applied as follows:

1. Before a Purchase Order is created.
2. After a Purchase Order is created.
3. After a Purchase Order is dispatched.

Editing a Requisition

1. Before a Purchase Order is created

- To make a change go to the Manage Requisition Page:

Navigation: Main Menu → eProcurement → Manage Requisitions

1000026136 GX - Shelving USC01 06/07/2016 Pending Valid 9,903.00 USD [Select Action] Go

Requester MARTINLC Entered By MARTINLC Priority Medium
Pre-Encumbrance Balance 9903.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line Information										Personalize	Find	First	1-3 of 3	Last
Line	ePro Special Request Item	Shelving for WFC127	Pending Approval	Price	Quantity	UOM	Supplier							
1		Shelving for WFC127	Pending Approval	1085.00000 USD	3.0000	EA	PRECISION EQUIPMENT & DESIGN LLC			✗				
2		Shelving for 125	Pending Approval	1236.00000 USD	3.0000	EA	PRECISION EQUIPMENT & DESIGN LLC			✗				
3		Shelving for PEC204	Pending Approval	980.00000 USD	3.0000	EA	PRECISION EQUIPMENT & DESIGN LLC			✗				

Note: The Requisition and Approval icons should be the only ones that have color.

Editing a Requisition

- Select Edit from the Select Action drop down box and use the Edit Requisition- Review and Submit page to make changes.

Edit Requisition - Review and Submit
Review the item information and submit the req for approval.

Click the Line Description for the line you want to change. This will take you to the Special Request page where you can make the change.

My Preferences Requisition Settings

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	Shelving for WFC127		PRECISION EQUIPMENT & DESIGN LLC	3.0000	Each	1085.0000	3255.00			
<input type="checkbox"/> 2	Shelving for 125		PRECISION EQUIPMENT & DESIGN LLC	3.0000	Each	1236.0000	3708.00			
<input type="checkbox"/> 3	Shelving for PEC204									

Select All / Deselect All Select lines to:

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

Item Details

*Item Description: Shelving for WFC127

*Price: 1085.0000

*Quantity: 3.0000

*Category: 420001

*Currency: USD

*Unit of Measure: EA

Due Date: 06/14/2016

Supplier

Supplier ID: 0000012868

Supplier Name: PRECISION EQUIPMENT & DESIGN LLC

Supplier Item ID:

Suggest New Supplier

Editing a Requisition

- After making the change be sure to Budget Check and Save and Submit.

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Dele
▶ <input type="checkbox"/> 1	Shelving for WFC127		PRECISION EQUIPMENT & DESIGN LLC	<input type="text" value="4.0000"/>	Each	1085.0000	4340.00		Edit	
▶ <input type="checkbox"/> 2	Shelving for 125		PRECISION EQUIPMENT & DESIGN LLC	<input type="text" value="3.0000"/>	Each	1236.0000	3708.00		Add	
▶ <input type="checkbox"/> 3	Shelving for PEC204		PRECISION EQUIPMENT & DESIGN LLC	<input type="text" value="3.0000"/>	Each	980.0000	2940.00		Add	

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

Total Amount 10,988.00 USD

Check Budget Pre-Check Budget Save & submit

Notice the Quantity for line 1 is now showing a quantity of 4.

Confirmation

Your requisition has been submitted.

Requested For MARTINLC	Number of Lines 3
Requisition Name GX - Shelving	Total Amount 10,988.00 USD
Requisition ID 1000026136	Pre-Encumbrance Balance 10988.00 USD
Business Unit USC01	Approval Justification Shelving is needed to organize & keep equipment safely maintained in all 3 fitness closets.
Status Pending	
Priority Medium	
Budget Status Valid	

The Pre-Encumbrance Balance has been updated to show the change.

View printable version Edit This Requisition Check Budget Pre-Check Budget

Editing a Requisition

- Review changes on the Manage Requisition page.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
1000026136	GX - Shelving	USC01	06/07/2016	Pending	Valid	10,988.00 USD	[Select Action]	Go

Requirer MARTINLC
 Pre-Encumbrance Balance **10988.00** USD
 Entered By MARTINLC
 Priority Medium

Requisition → Approvals → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Request Lifespan:

Line Information Personalize | Find | [Icons] First 1-3 of 3 Last

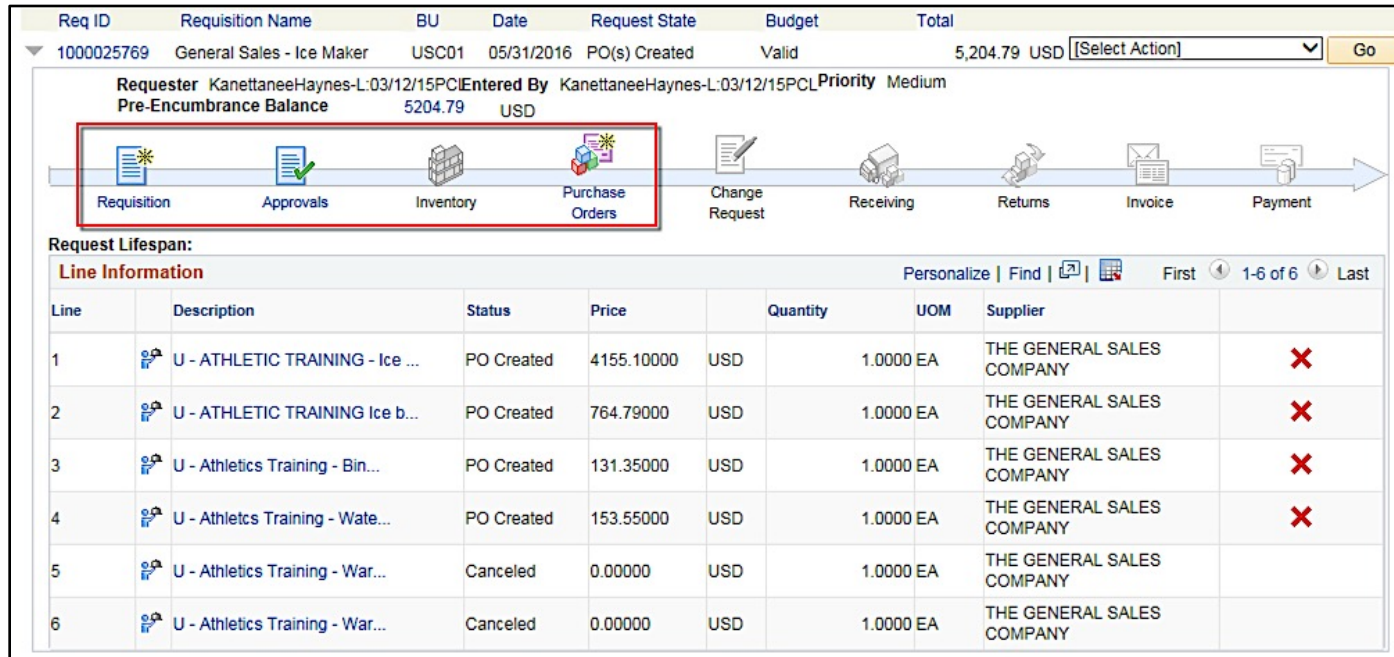
Line	Description	Status	Price	Quantity	UOM	Supplier	
1	Shelving for WFC127	Pending Approval	1085.00000 USD	4.0000	EA	PRECISION EQUIPMENT & DESIGN LLC	✗
2	Shelving for 125	Pending Approval	1236.00000 USD	3.0000	EA	PRECISION EQUIPMENT & DESIGN LLC	✗
3	Shelving for PEC204	Pending Approval	980.00000 USD	3.0000	EA	PRECISION EQUIPMENT & DESIGN LLC	✗

Editing a Requisition

2. After a Purchase Order is created.

- To create a Change Request:

Navigation: Main Menu → eProcurement → Manage Requisitions



Requester KanettaneeHaynes-L:03/12/15PCI Entered By KanettaneeHaynes-L:03/12/15PCL Priority Medium
Pre-Encumbrance Balance 5204.79 USD

Request Lifespan:

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	U - ATHLETIC TRAINING - Ice ...	PO Created	4155.10000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	✗
2	U - ATHLETIC TRAINING Ice b...	PO Created	764.79000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	✗
3	U - Athletics Training - Bin...	PO Created	131.35000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	✗
4	U - Athletics Training - Wate...	PO Created	153.55000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	✗
5	U - Athletics Training - War...	Canceled	0.00000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	
6	U - Athletics Training - War...	Canceled	0.00000 USD	1.0000 EA	EA	THE GENERAL SALES COMPANY	

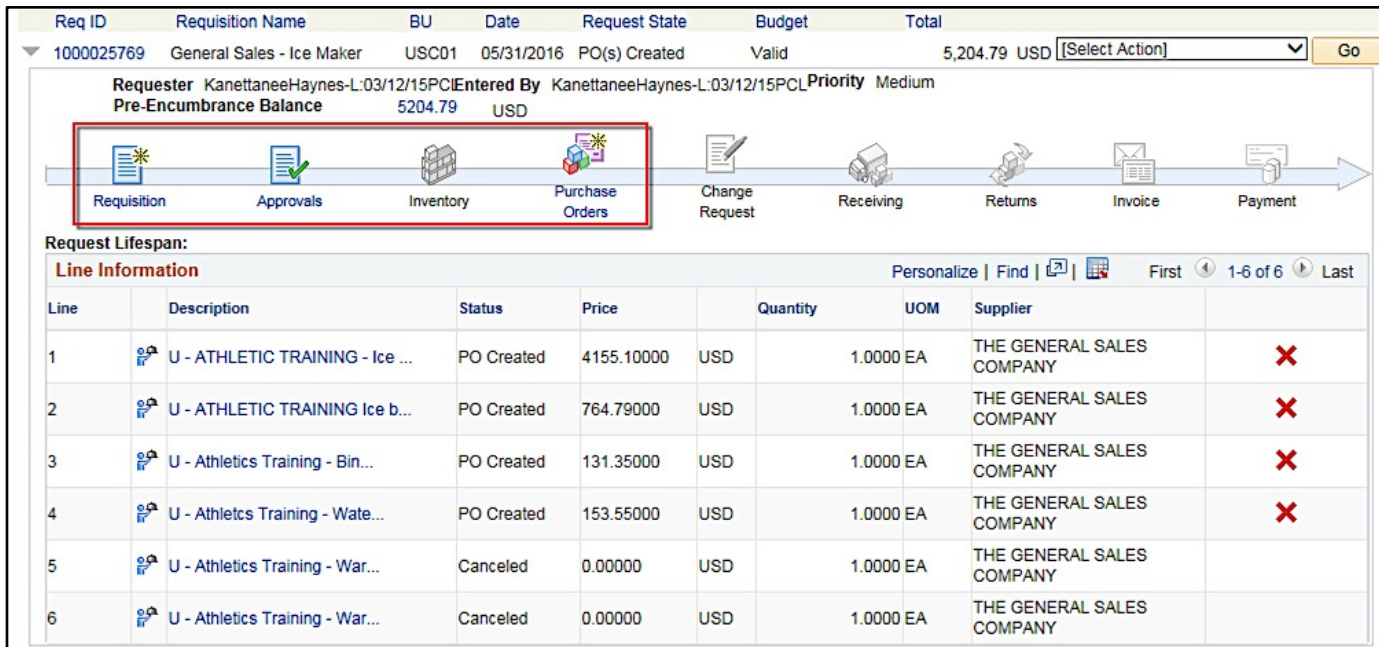
Note: The Requisition, Approval and Purchase Order icons should be the only ones that have color.

Editing a Requisition

3. After a Purchase has been dispatched.

- To create a Change Request:

Navigation: Main Menu → eProcurement → Manage Requisitions



Requester KanettaneeHaynes-L:03/12/15PC Entered By KanettaneeHaynes-L:03/12/15PCL Priority Medium
Pre-Encumbrance Balance 5204.79 USD

Request Lifespan:

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	U - ATHLETIC TRAINING - Ice ...	PO Created	4155.10000	USD	1.0000 EA	THE GENERAL SALES COMPANY	✗
2	U - ATHLETIC TRAINING Ice b...	PO Created	764.79000	USD	1.0000 EA	THE GENERAL SALES COMPANY	✗
3	U - Athletics Training - Bin...	PO Created	131.35000	USD	1.0000 EA	THE GENERAL SALES COMPANY	✗
4	U - Athletics Training - Wate...	PO Created	153.55000	USD	1.0000 EA	THE GENERAL SALES COMPANY	✗
5	U - Athletics Training - War...	Canceled	0.00000	USD	1.0000 EA	THE GENERAL SALES COMPANY	
6	U - Athletics Training - War...	Canceled	0.00000	USD	1.0000 EA	THE GENERAL SALES COMPANY	

Note: The Requisition, Approval and Purchase Order icons should be the only ones that have color and a status of PO Dispatched or Received, etc..

Reviewing Change Request Information

Using the Change Request Icon.

- To review change request information go to the Manage Requisition Page:

Navigation: Main Menu → eProcurement → Manage Requisitions

1000026065 Care Coordination Insti... USC01 06/06/2016 Pending Valid 5,999.00 USD [Select Action] Go

Requester Debra Brown
Pre-Encumbrance Balance 999.00 USD



Entered By Debra Brown
USD

Priority High

Requisition Approvals Inventory Purchase Orders **Change Request** Receiving Returns Invoice Payment

Request Lifespan:

Line Information Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	 Preliminary Data for submiss...	Pending Approval	5999.00000 USD	1.0000	EA	CARE COORDINATION INSTITUTE	


Reviewing Change Request Information







Use the Review Change Requests page to review information regarding changes made.

Requisition Change Requests

To view requisition change request detail records, click the Expand triangle icon.

Requisition ID	Requisition Name	Purchase Order	Change Date/Time	Requisition Approval Status	Change Request Status	Processing Error
 1000026065	Care Coordination Insti...	2000026554	06/15/2016 11:41:03AM	Pending	Initialize	

Requester Debra Brown Entered By Debra Brown

Change Request Details Personalize | Find | View All |  |  First  1-2 of 2  Last

Change Requests	Change Reason	Processing Errors							
Line	Sched	Change Date/Time	Item Description	Change Type	Field	Prior Value	Changed Value	Requisition Approval Status	Change Request Status
1	1	06/15/2016 11:41:03AM	Preliminary Data for submissio	Change	Requisition Price	5000.00000	5999.00000	Pending	Initialize
1	1	06/15/2016 11:40:53AM	Preliminary Data for submissio	Change	Requisition Price	5000.00000	5999.00000	Pending	Initialize

PeopleSoft Resources



UNIVERSITY OF SOUTH CAROLINA

CALENDAR MAP DIRECTORY Search sc.edu GATEWAYS

The Division of Information Technology

SC.edu » About » Office » The I » PeopleSoft » Resources

<h3>PeopleSoft Chart of Accounts</h3> <ul style="list-style-type: none">• PeopleSoft Chart of Accounts »• New Code Structure »• A Quick Reference Guide to Categories »	<h3>PeopleSoft Workflow</h3> <ul style="list-style-type: none">• ePro Requisition Approval Workflow »• Workflow Tip 1 »• Workflow Tip 2 »• Department Approvers »
<h3>Payment Request Information</h3> <ul style="list-style-type: none">• Payment Request Matrix »• Payment Request Guidelines »	<h3>eProcurement Information</h3> <ul style="list-style-type: none">• Revised Quick Reference for Amount Only vs. Quantity »• Revised Quick Reference for Receiving in PeopleSoft »• Quick Reference for a Change Order »• Requisitioner Hands On Training PPT »• Receiving in PeopleSoft Webinar Recording »• Dell Punchout Webinar PPT »• Chrome Web Browser Update »• Internet Explorer Web Browser Update »• Mozilla Firefox Web Browser Update »

Questions...



- If you have questions regarding any specific content from this course or other departmental needs related to eProcurement, Requisitions, Purchase Orders, or Receipts, please e-mail purchasing@sc.edu.
- This presentation is also available to download on OneCarolina's PeopleSoft Training webpage.
- If you have general questions or concerns about PeopleSoft training, please email them to PSTRAIN@mailbox.sc.edu.

