Indiana Department of Administration
Procurement Division

PeopleSoft eProcurement

Issuing a Purchase Order using Expedite Requisitions

Version 18.6-07

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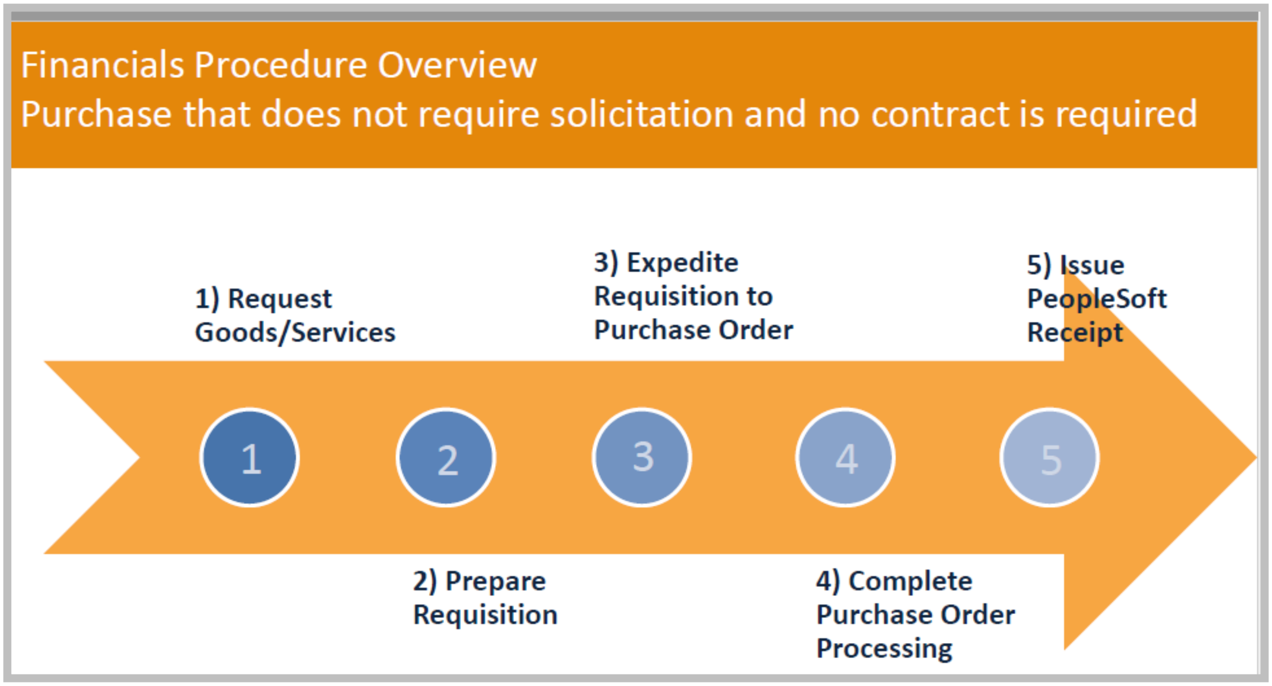
Financials Procedure Overview
Purchase that does not require solicitation and no contract is required
1) Request Goods/Services
3) Expedite Requisition to Purchase Order
5) Issue PeopleSoft Receipt
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2) Prepare Requisition
4) Complete Purchase Order Processing

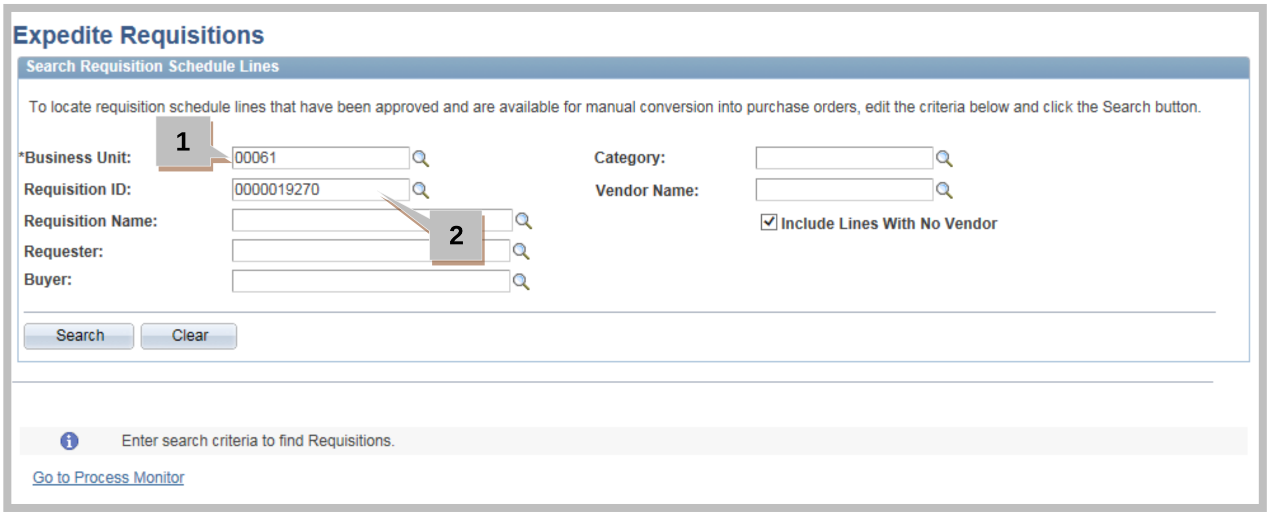
Issuing a Purchase Order using Expedite Requisitions

Retrieve the Requisition Schedule Lines

Menu Navigation

eProcurement >> Buyer Center >> Expedite Requisitions

On the Expedite Requisitions page the user must enter search criteria to find the Approved and Valid Requisition lines to expedite to a Purchase Order (PO). The recommended criteria are below:



1. **Business Unit**
   The user must enter/verify the five digit version of the Business Unit of the Requisition. The Buyer will have a default value populated here; it can be edited if the user has been given access to multiple business units and needs to access a different one.

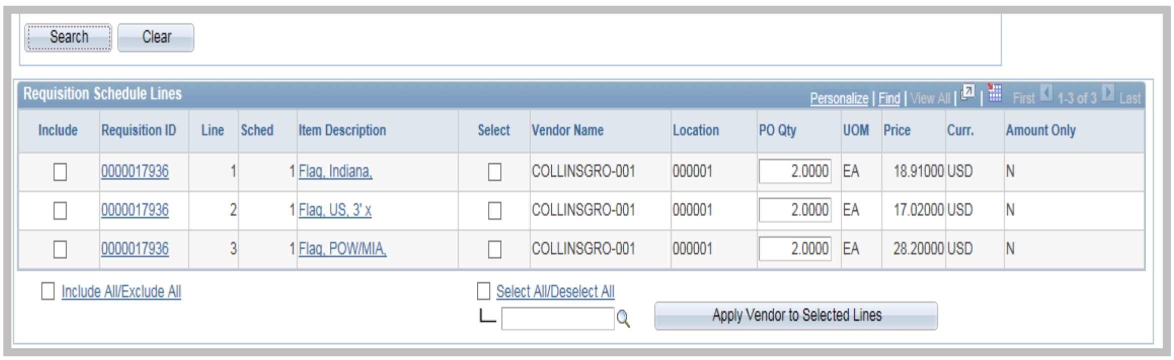
2. **Requisition ID**
   The user can enter the ten digit Requisition number.

After the search criteria have been entered the user must click Search to retrieve the Requisition Schedule Lines that match.

Review the Requisition Schedule Lines

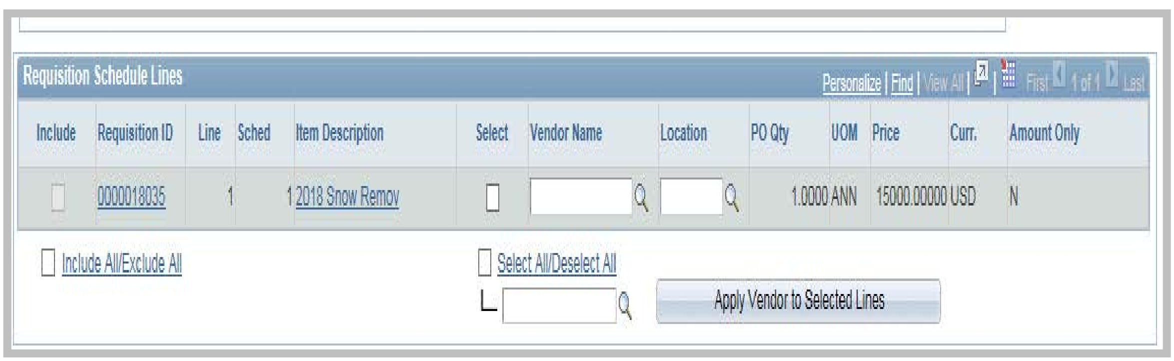
Verify the QPA vendor information

If the user is creating a PO from a Requisition that was built from QPA items, the appropriate Vendor Name and Location associated with the items will be populated as shown below. If the remaining information (including the Requisition ID, Line, Schedule, Item Description, PO Quantity, Unit of Measure, Pricing, Currency and Amount Only) is correct, the user can skip to the Select the lines and Submit section to proceed.



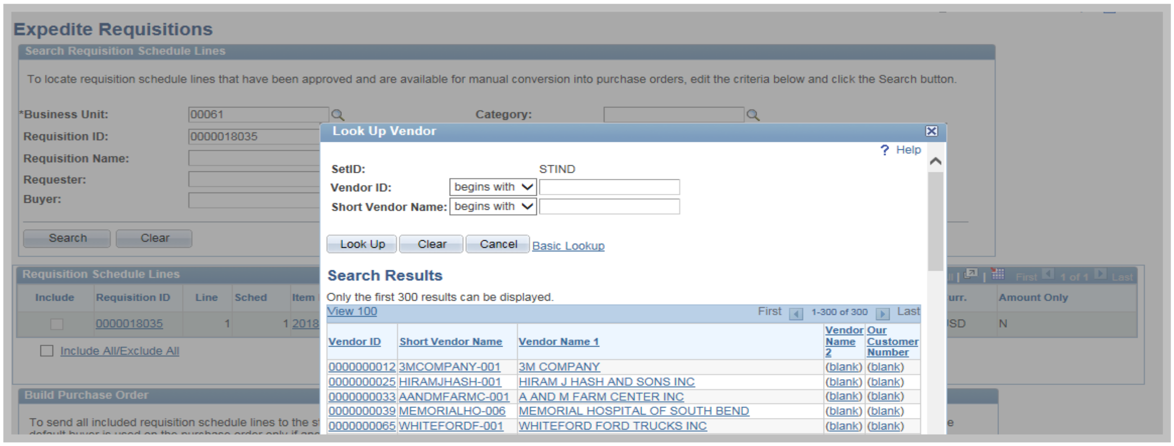
Apply the vendor information

If the user is creating a PO from a Requisition that was not built from QPA items, the user will have to select the appropriate Vendor Name and Location because they will not be populated as shown below.



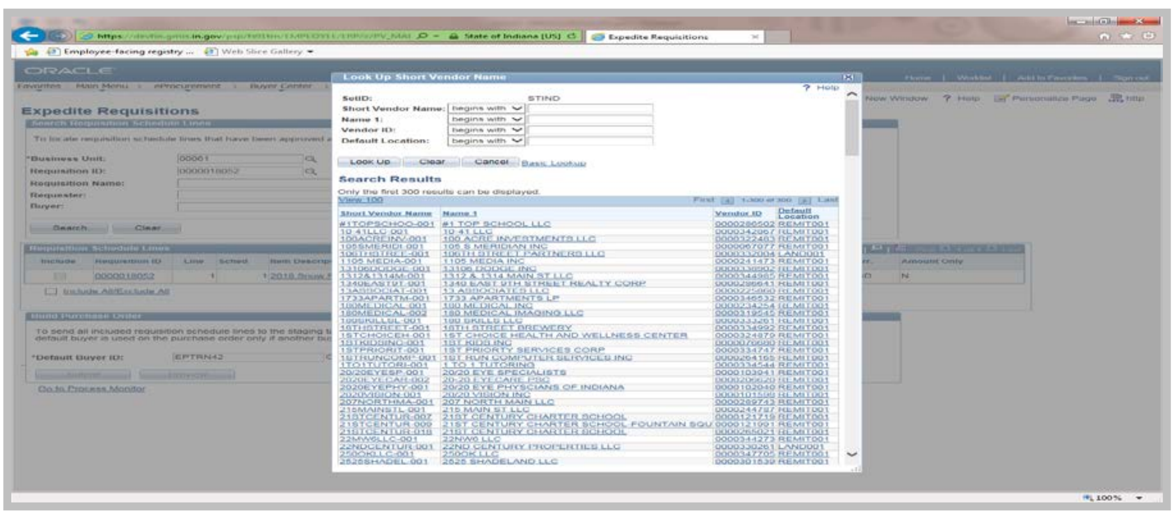
If the Short Vendor Name is known, enter it into the Vendor Name field and click tab for the location to be populated. If the Short Vendor Name is not known, the user will need to click the magnifying glass to the right of the Vendor Name field.

The user can search by the vendor ID or a portion of it (ten digit number assigned by the Auditor of State's office) or the Short Vendor Name (compressed version of the vendor's legal name). IDOA suggests the user search by changing the Short Vendor Name dropdown to "contains" and entering a unique portion of the company name in the field before clicking Look Up. Once the user has located the correct vendor he/she should click anywhere on the appropriate vendor's row to return to the prior screen. The vendor name and location will be populated in the fields.



If there are multiple lines, then the vendor name can be copied in pasted into the remaining lines or use the following method instead.

If the Short Vendor Name is not known, the user will need to click the magnifying glass to the left of the Apply Vendor to Selected Lines button. The user can search by any of the available criteria. IDOA suggests the user search by changing the Name 1 (the Vendor's legal name) dropdown to "contains" and entering a unique portion of the company name in the field before clicking Look Up. Once the user has located the correct vendor he/she should click anywhere on the appropriate vendor's row to return to the prior screen. The vendor name and location will be populated in the field.



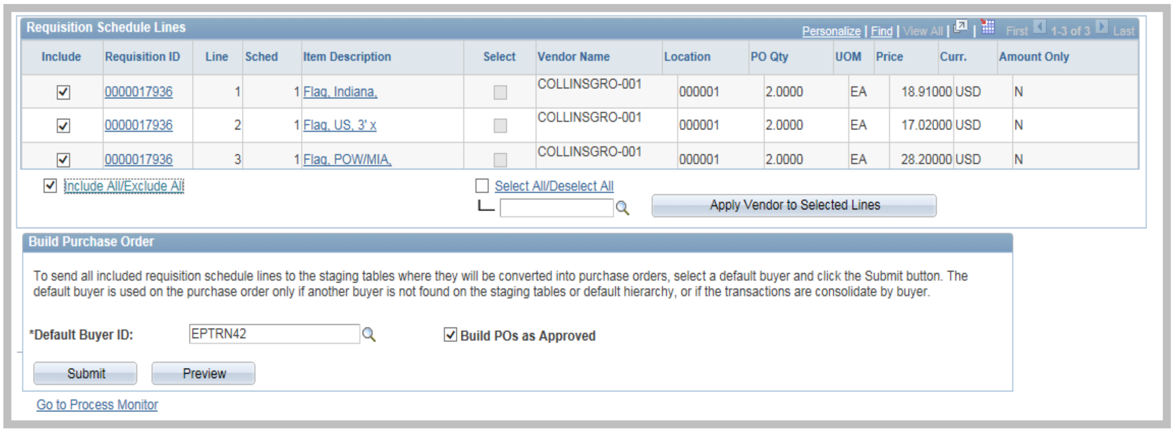
The user can click the checkbox in the Select column for each row or can click on the Select All/Deselect All link to select all of them. The user must click Apply Vendor to Selected Lines so the vendor name and location will be populated on them.

Any items not tied to a QPA contract should have a Location with the word REMIT included. Before making adjustments to the location see the section labeled Changing the Vendor's Addresses in the PO Processing manual. QPA line items have been set up to default the location tied to the contract – no adjustment to the location should be made.

If the remaining information (including the Requisition ID, Line, Schedule, Item Description, PO Quantity, Unit of Measure, Pricing, Currency and Amount Only) are correct, then the user can skip to the Select the lines and Submit section to proceed.

Select the lines and Submit

To build to the PO the user will need to select the checkbox under the Include column for each line or if all lines are needed, then he/she can click the Include All/Exclude All link beneath the list. Once the lines have selected the Submit and Preview buttons will become available.



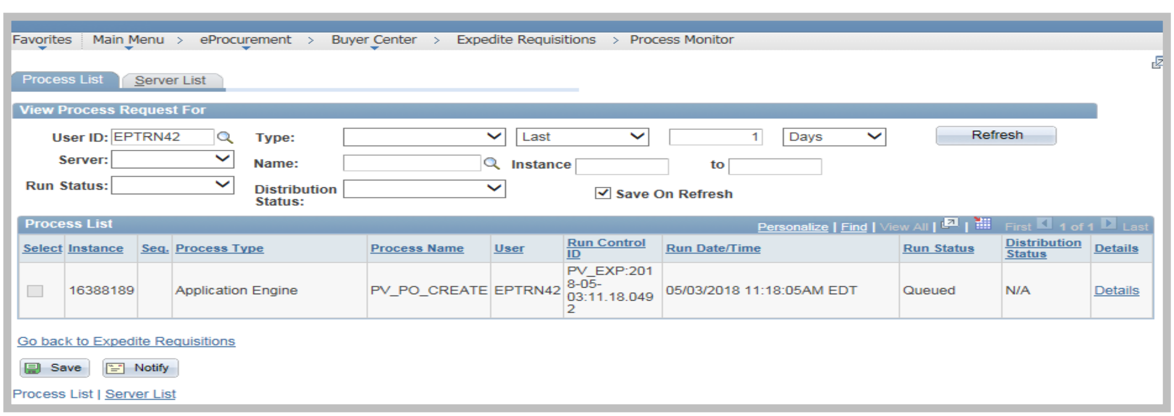
The user should review/edit the Default Buyer ID and verify the Build POs as Approved checkbox is selected before clicking Submit. Selecting Build POs as Approved places the PO in Pending Approval status instead of Open status, eliminating processing steps on the PO. After the user clicks Submit, the page will refresh and the Requisition Schedule Lines will no longer be displayed and the Submit and Preview buttons will no longer be available.

Verify the PO Initiation

Through the Process Monitor

The user can click the Go To Process Monitor link at the bottom of the Expedite Requisitions page; a new window will open with the Report Manager. If the new window is not displayed, check the Windows Task Bar for an open window titled Report Manager.

The user can click Refresh until the Run Status and Distribution Status columns display Success and Posted. This indicates the creation process was successful.

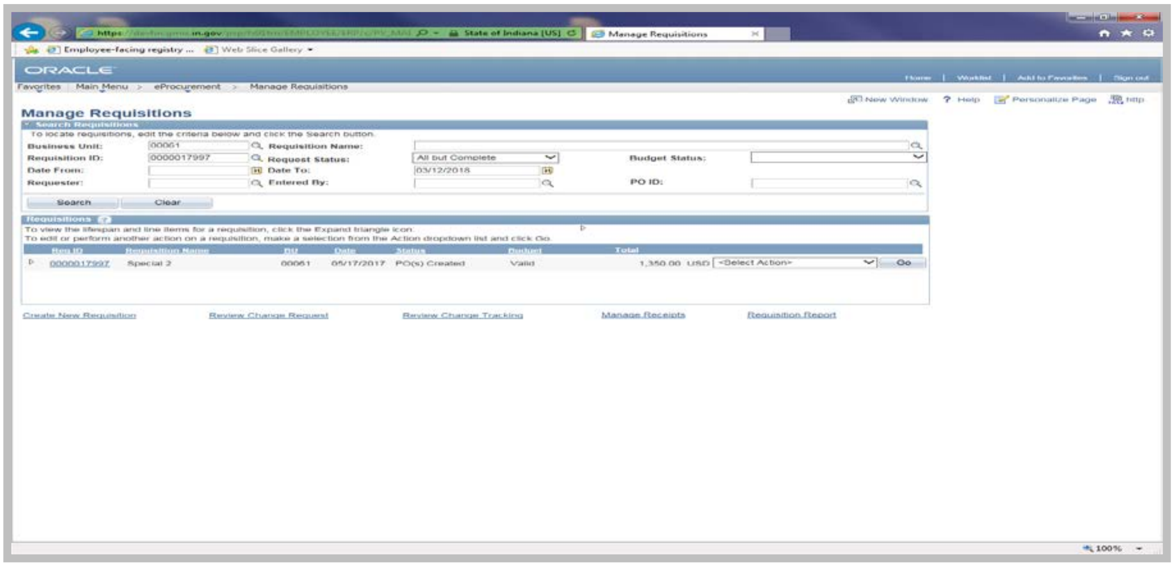


Through Manage Requisitions

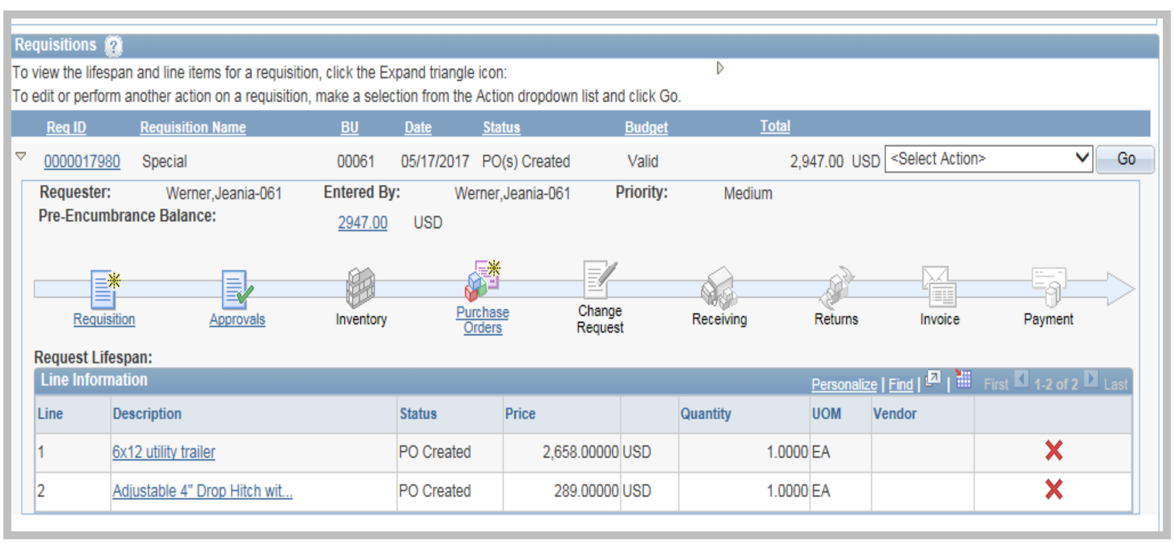
Menu Navigation

eProcurement >> Manage Requisitions

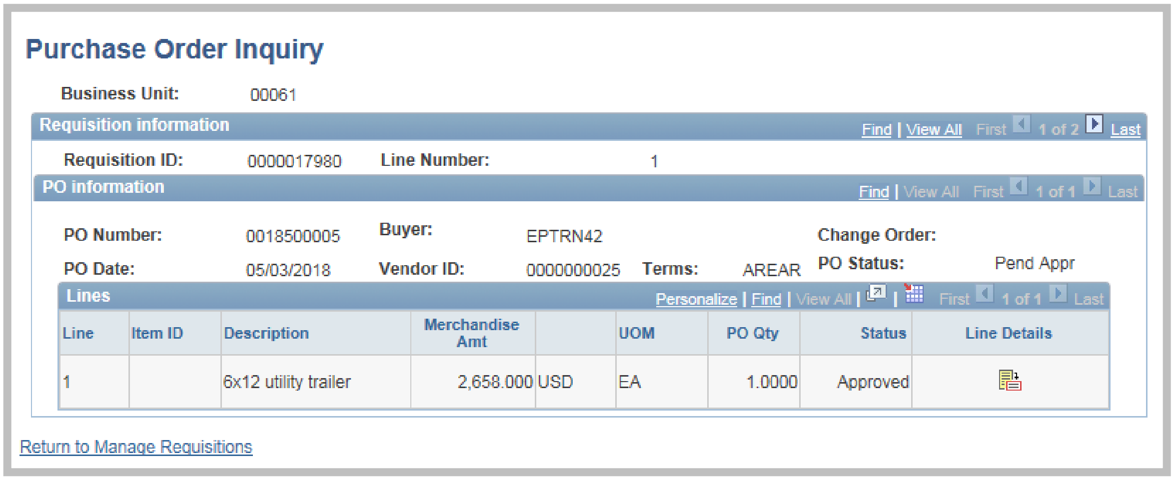
The user can locate the desired Requisition by entering any of the search criteria on the page and clicking Search. There must be a Business Unit and a Date To date (ending date of the search period) to run the process.



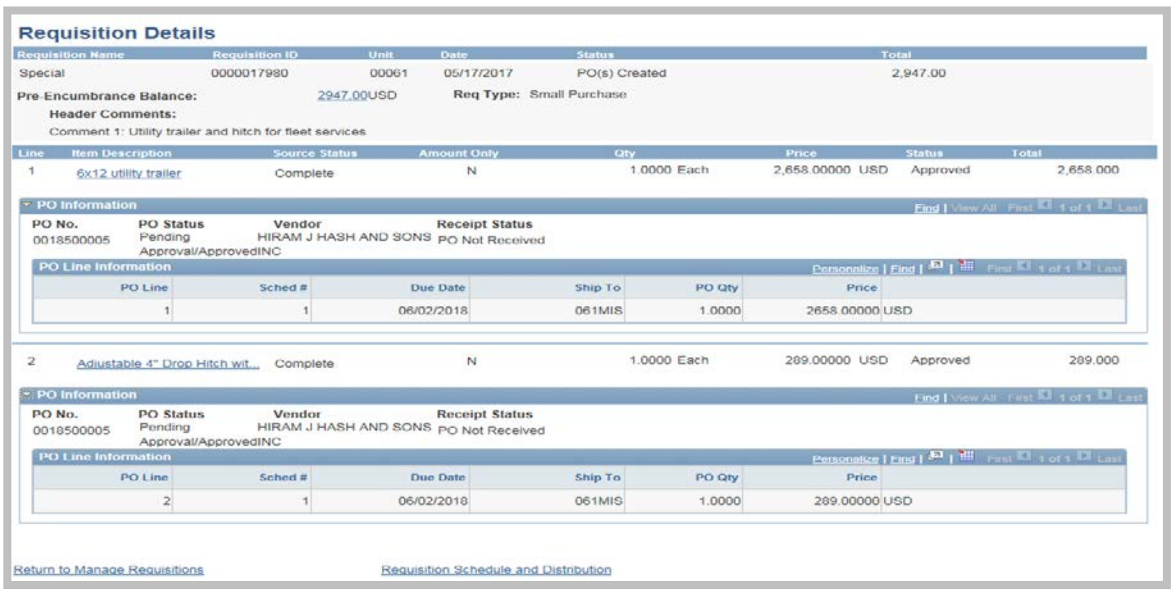
If the creation process was successful, the Status column will say PO(s) Created. If the user clicks the expand icon to the far left of the Req ID number, it will provide a basic overview of the Requisition header and includes the Request Lifespan (the completed actions will be highlighted) and Line Information.



If the user has access, then he/she can click on the highlighted Purchase Orders icon to retrieve the PO number. The user can click the icon again to collapse the information.



The user can click on the Requisition ID number assigned by PeopleSoft to display the Requisition Details page. The user can retrieve the Purchase Order number(s) by clicking the expand icon on the line(s) labeled PO Information. After the user as reviewed the information, he/she can click the Return to Manage Requisitions link to return to that page.



Or he/she can navigate directly to eProcurement>>Buyer Center>>Manage Purchase Orders to verify and complete the PO. The Verify and Complete the Purchase Order manual and other helpful resources are posted at http://www.in.gov/idoa/2934.htm.