

PeopleSoft Training Activity Sheet

PO1: REQUISITIONS

For use in training. Last updated August 16, 2016

Activity 1: Find Existing Requisitions

Directions: Navigate to **Main Menu > eProcurement > Manage Requisitions**. Find these requisitions in the training database at District 02000. Answer the questions for each. Refer to pp.52-54 and pp.66-68 of the Requisitions (PO1) guide.

| Req # | Questions | | |
|------------|--------------------------------|--|--|
| 0000012584 | Request State & Budget Status? | Requisition Name and Date? | How many line items in this requisition? |
| 0000023182 | Request State & Budget Status? | Ship To? Location? Amount Only? | What is the ChartString for Line item 1? |
| 0000023177 | Request State & Budget Status? | Line item#1: What is the Price? Quantity? UOM? | What is the Pre-Encumbrance Balance? Total Requisition Amount? |
| 0000015496 | Request State & Budget Status? | Is there an attachment? Any comments? | CHALLENGE: What is the Purchase Order #? |

Have extra time?

1. How many requisitions have the Request state of *Canceled* dated with November 2015? _____
2. How many requisitions are related to "USB flash drive"? _____
3. How much is the most expensive USB flash drive? _____
4. How many requisitions are attached to just your Requester ID? _____

Activity 2: Requisition for 1 Item

Directions: You need to order a lot of red paint. Create a requisition. You will order from Blick Art. Navigate to **Main Menu > eProcurement > Requisition**. Add this page to Favorites. Click the **Special Request** link. Refer to pp.24-26 of the Requisitions (PO1) Guide.

| Special Request | Review and Submit | Mass Change Link | Confirmation Page |
|--|---|--|--|
| <input type="checkbox"/> Item Description: PAINT, TEMPERA, LIQUID, 16 OZ, RED <input type="checkbox"/> Price: \$1.28 <input type="checkbox"/> Quantity: 25 <input type="checkbox"/> UOM: Bottle <input type="checkbox"/> Category: 60120000 <input type="checkbox"/> Supplier ID: 9048 <input type="checkbox"/> Supplier Item ID: 245 | <input type="checkbox"/> Requisition Name: Art Supplies (<i>Your Login ID</i>) <input type="checkbox"/> Priority: Medium <input type="checkbox"/> Comments: | <input type="checkbox"/> Ship To: 0000000813 <input type="checkbox"/> Due Date: Two weeks from today's date <input type="checkbox"/> Attention: Teacher Ana <input type="checkbox"/> Location: 0000000110 <input type="checkbox"/> Fund: 0100 <input type="checkbox"/> Resource: 0000000 <input type="checkbox"/> Goal: 1110 <input type="checkbox"/> Function: 1000 <input type="checkbox"/> Object: 4300000 <input type="checkbox"/> Site: 110 | <input type="checkbox"/> Run Budget Check <i>Verify the following information:</i> <input type="checkbox"/> Pre-Encumbrance <input type="checkbox"/> Pending |

Write down the Requisition ID #: _____ Can you find it from the Manage Requisition page? _____

Activity 3: Requisition for Many Items

Scenario: We need some restroom supplies!

Directions: Create a requisition using Express Item Entry page using the information below. Refer to pp.18-23 of the Requisitions (PO1) Guide.

Chartstring: Fund 0100, Resource 0000000, Goal 0000, Function 8200, Object 4300000, and Site 110

Ship To: 0000000813, **Location:** 0000000110

| Item Description | Qty | Price | UOM | Category | Supplier ID | Due Date |
|------------------|-----|---------|-----|----------|-------------|-----------------------------|
| Bathroom tissue | 10 | \$37.00 | BX | 14111700 | 3592 | Two weeks from today's date |
| Seat cover | 10 | \$11.00 | PK | 14111700 | 3592 | |
| Air freshener | 10 | \$8.00 | BX | 14111700 | 3592 | |

Write down the Requisition ID: _____

Activity 4: Requisition with Multiple Distribution

Scenario: You will order sports supplies and charged it against two distributions.

Directions: Create a requisition and use the Requisition Settings link. Refer to pp.37-39 of the Requisitions (PO1) Guide.

Chartstrings: Fund 0100, Resource 0000000, Goal 1110, Function 1000, Object 4300000, Sites 110 and 130

Ship To: 0000000813, **Location:** 0000000110

| Item Description | Qty | Price | UOM | Category | Supplier ID | Due Date |
|------------------|-----|---------|-----|----------|-------------|-----------------------------|
| Basketball | 4 | \$67.49 | EA | 49220000 | 13240 | Two weeks from today's date |
| Volleyball | 4 | \$71.99 | EA | 49220000 | 13240 | |

Write down the Requisition ID: _____

Activity 5: Assets

Scenario: You will buy 2 laptops from Dell in the amount of \$500 each.

Directions: Create a requisition for the laptops. Refer to p.32 of the Requisitions (PO1) Guide.

- Use **Category Code** 43211500 and have it ship within two weeks.
- Use this Chartstring:
Fund 0100, Resource 0000000, Goal 1110, Function 1000, Object 4400095, Site 110.
- Make sure you enter the **AM Unit** and **Profile ID**.

Write down the Requisition ID #: _____

Activity 6: Order Items from your Warehouse

Note: This activity is for districts who use the Inventory module in PeopleSoft.

Scenario: You will order 5 package of paper construction from the warehouse.

Directions: Create a requisition using the Catalog page. Refer to pp.27-31 of the Requisitions (PO1) Guide.

Chartstring: Fund 0100, Resource 0000000, Goal 1110, Function 1000, Object 4300000, Site 110

Ship To: 0000000110, **Location:** 0000000110

Write down the Requisition ID #: _____

Activity 7: Blanket Requisitions

Directions: Find requisition **0000023184**. This is a blanket requisition.

What looks different on a blanket req? _____

Activity 8: Favorites & Templates

Directions:

1. Find the requisition you created in Activity 2. Add the one item as a favorite. Order from the Favorites link.
2. Find the requisition you created in Activity 3. Add *all of the items* as a template. Order the items from the Templates link. BONUS: Modify the order slightly (qty of items).

Activity 9: Budget Checking

1. Where can you budget check a requisition? _____
2. Budget check the requisitions from Activities 4 and 5.
 - Activity 4 Requisition ID: _____
 - Budget Status: _____
 - Activity 5 Requisition ID: _____
 - Budget Status: _____

Activity 10: Budget Errors

1. What are the different ways to access and review the budget error? _____

2. When can you modify the ChartString? _____

Activity 11: Modify a Requisition

Directions: Answer the questions below.

| Question | Answer |
|--|--------|
| 1. When can you modify a requisition? | |
| 2. What can you change in the requisition? | |
| 3. What are the two ways you can edit line(s)? | |

Activity 12: Put It All Together

Directions:

1. Find an existing requisition.
2. Copy the requisition.
3. Modify it.
4. Budget check it.

Do you have extra time? Cancel the requisition. Budget check it.
