Click on the “eProcurement” link.
Click the “Create Requisition” link.
Enter a name for your requisition. This will make it easier to look up the requisition in the future. Set the “Accounting Date” according to the desired fiscal year (7/01 or later for the next fiscal year).
Click either the “Continue” button or “2. Add Items and Services” to proceed.
Click the “Special Item” link.

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.

Select a Request Type

- Special Item: Request an item that is not listed in the Catalog.
- Fixed Cost Service: Request a one-time service for a flat fee.
- Variable Cost Service: Request a service for which the fee is based on the time worked.
- Time and Materials: Request a service for which the fee is based on the time worked and materials used.

Revised 12/7/11   Towson University   Page 5 of 22
Entering a Service Requisition

Enter the Description, the Quantity, the Price and the Unit of Measure. The quantity for a service requisition will always be one (1) and the Unit of Measure will always be $$$$. The price will be what you intend to spend for a year. Click the Lookup button next to the Category box.
Click the small folder with the + sign to open the Category Tree.

Look Up Category
Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories
Browse Category Tree
Select a catalog: All Purchase Items
Left Right ALL ITEMS - DO NOT USE

Requisition Summary
There are no lines on this request. Please add new line in order to save the requisition.
Total Lines: 0
Total Amount (USD): 0
Click the + sign on the folder containing the appropriate category. In this example, click “Services.”
When the folder opens, click on the appropriate category. (Note: The folder for a category will not contain a +.) In this example, click on “Other Services.”
The Item Category assigns the account number to your requisition (you will not see the number) and is used to route the requisition to a Buyer. If you have not already done so, fill in the Unit of measure with $$$ and enter the date you want the service to start in Due Date. Enter any Additional Information and click the boxes labeled, “Send to Vendor,” “Show at Receipt” and “Show at Voucher.”
If the vendor is in PeopleSoft, it can be found using the Vendor Lookup. If it is a new vendor, click the “Suggest New Vendor” link and enter at least a vendor name, contact and phone number. When you are done, click OK.
Click the “Add Item” button to add the item to your requisition.
Entering a Service Requisition

A new blank entry screen will appear which can be used to include additional items to your requisition. When you are done adding items, click “Review and Submit.”
The screen will show all items on your requisition.
Updated Job Aid for Requesters
PeopleSoft Financials 9.1

Entering a Service Requisition

If you need to adjust accounting charges before you submit the requisition, click on the small triangle next to the requisition line.

![Image of Create Requisition screen]

Requisition Name: Service Requisition Demo

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Vendor Name</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Service</td>
<td></td>
<td>1.0000</td>
<td>Dollars</td>
<td>50,000.00</td>
<td>50,000.00</td>
</tr>
</tbody>
</table>

Consolidate with other Reqs
Override Suggested Vendor

Shipping Line: 1
Due Date: 12/31/2011
Status: Active
Ship To: CENTRECV
Modify Shipping Address

Distribute By: Qty
Speed Chart:
Liquidate By: Amt

Accounting Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Location</th>
<th>Quantity</th>
<th>Percent</th>
<th>Merchandise/Amt</th>
<th>GL Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open</td>
<td>PROCUREMT</td>
<td>1.0000</td>
<td>100.000</td>
<td>50,000.00</td>
<td>TOWSON</td>
</tr>
</tbody>
</table>

Total Amount: 50,000.00 USD

Revised 12/7/11

Towson University
If you need to change the department on the requisition, click the tab labeled “Chartfiels2”.

Revised 12/7/11  Towson University  Page 16 of 22
Entering a Service Requisition

Enter your justification comments in the “Comments” box and click the box labeled “Approval Justification”.

Revised 12/7/11

Towson University
Click the small yellow and red icon labeled “Line Details.”
The Line Details page will appear. Click in the box labeled “Amount Only,” then click OK.
This message will appear. Click “Yes.”

[Image of a computer screen showing a Requisition interface in PeopleSoft Financials 9.1]

Revised 12/7/11

Towson University
You will be taken back to the “Review and Submit” screen. If you want to save your requisition without submitting it for approval, click “Save and Preview Approvals.” If you would like to submit the requisition for approval, click “Save and Submit.”
Entering a Service Requisition

When you click “Save and Submit,” this screen will appear telling you where the requisition has been submitted for approval. Once the requisition has been approved and successfully budget checked, it will be forwarded to the appropriate Buyer for action.