



PROUDLY PRESENTING **THE PEOPLESOFT 9.2**

9.2¢

ISSUE N°1
2014

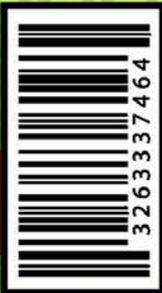
FINANCIAL UPGRADE



305\$8795
325987413
152\$43684
32159787

e-Pro REQUESTER
8.9 vs. 9.2

DEBUT ISSUE LOADED WITH BRAND NEW FEATURES

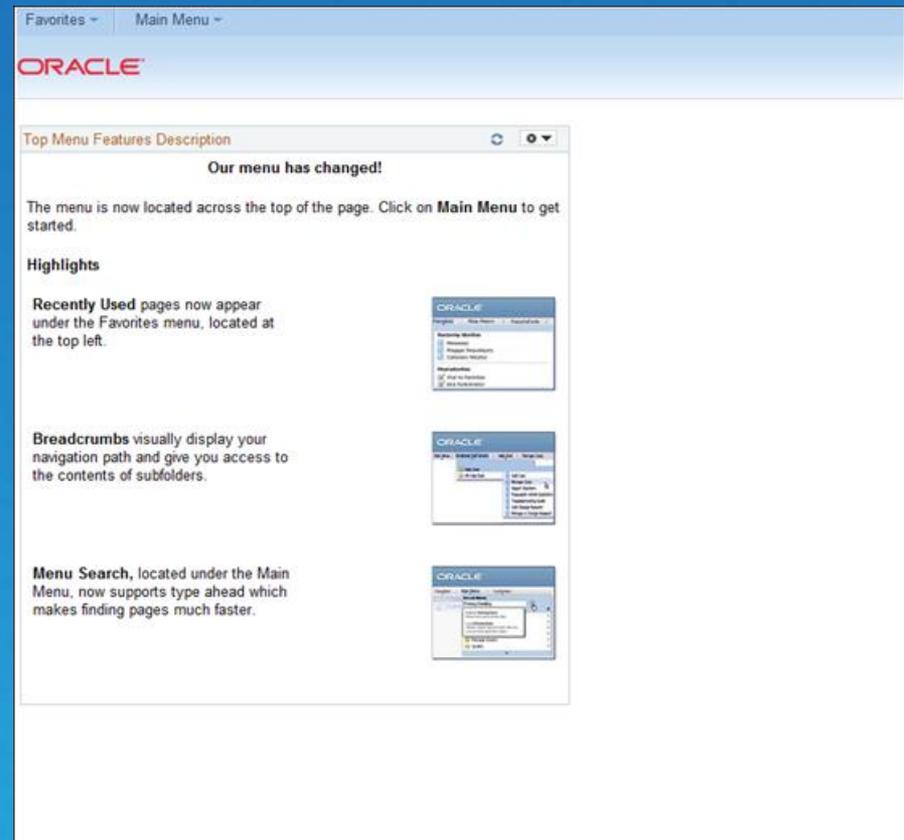


MENUS



In 8.9, the main menu is on the left side of the screen.

In 9.2, the main menu is at the top of the screen.



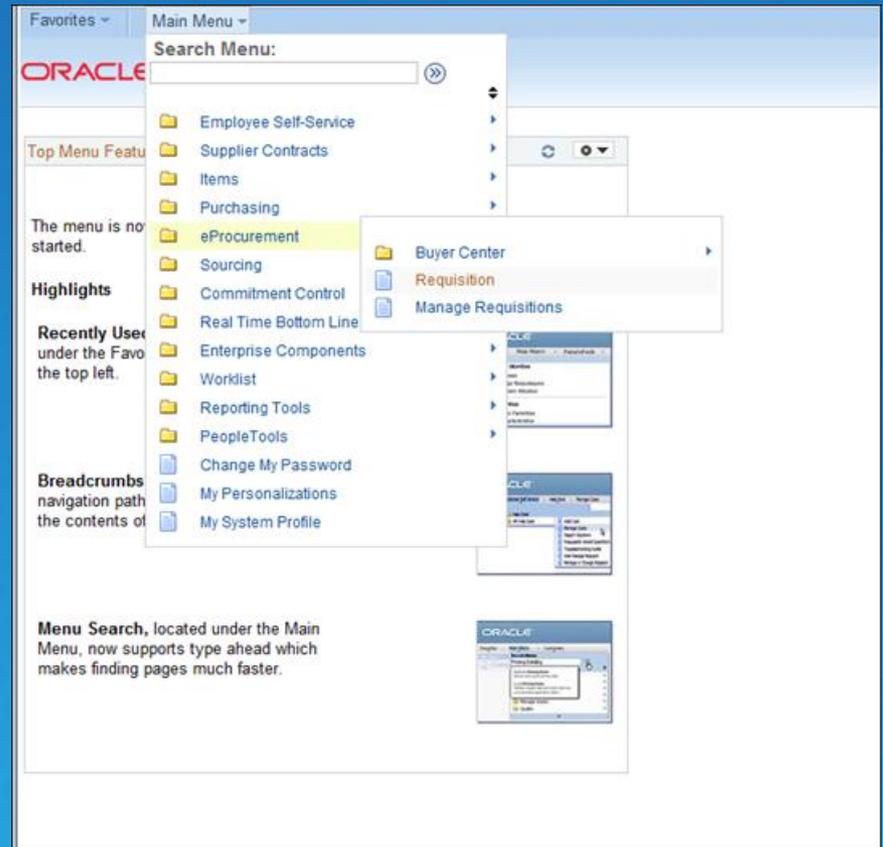


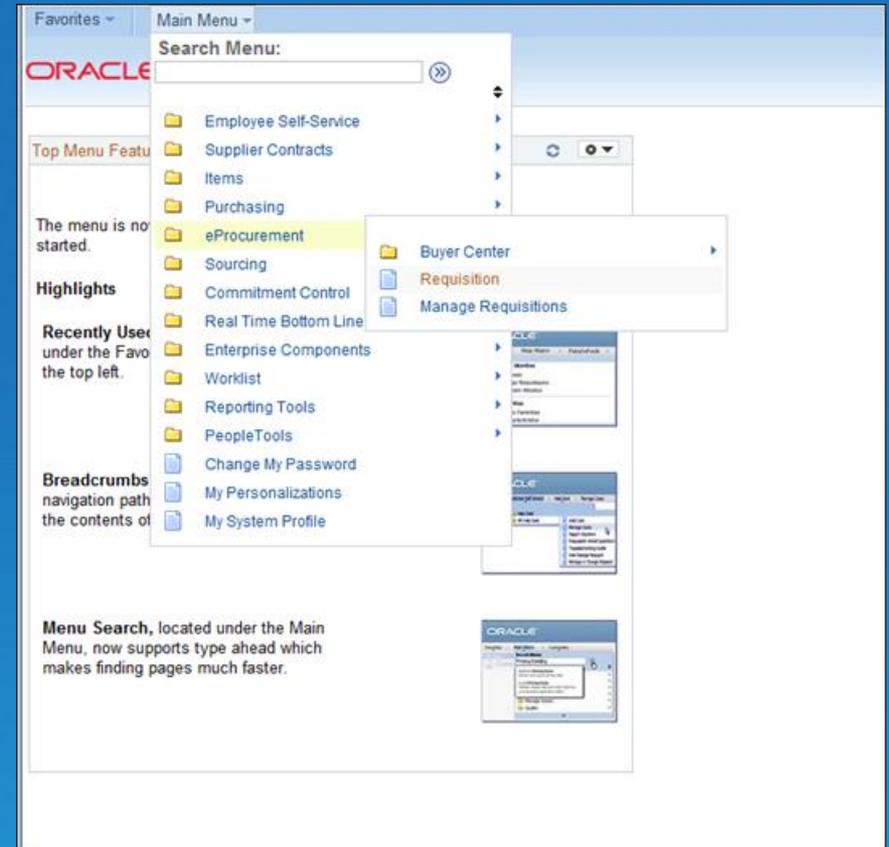
In 8.9, additional menu items are expanded with the arrow icon.

The menu remains open at left unless closed or minimized.

In 9.2, additional menu items cascade as they expand.

The selections form a line of breadcrumbs at the top of the screen.





Menu Search, located under the Main Menu, now supports type ahead which makes finding pages much faster.

Note: The word “create” has been removed from the menu in 9.2.

REQ CREATION

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: 09000 Mgmt and Enterprise Services *Origin: ISD ISO
*Requester: KHAGERREQ Kirk Hager *Currency: USD
Requisition Name: Meets OK EITA Standards? Priority: Medium

Line Defaults
Continue

The first screen in 8.9 shows the three steps necessary to create a req.

Step 1: Name the Req.

Oracle eProcurement - Create Requisition

Welcome Kirk Hager

Request Options Search All Search Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

Catalog Browse Catalogs
CAP IDIQ
CAP On Call
CAP State Roof AM
CAP Category Tree

Web Browse Supplier Websites

Express Item Entry Create an Express Requisition

Requisition Settings

The Create Requisition Page is the first page to open in 9.2.

To create a requisition in the same three steps as 8.9, click Requisition Settings.

Requisition Settings

Business Unit 09000 Mgmt and Enterprise Services
Requester KHAGERREQ Kirk Hager
*Currency USD
Meets OK EITA Standards? [v]
Priority Medium

Requisition Name []

Line Defaults

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

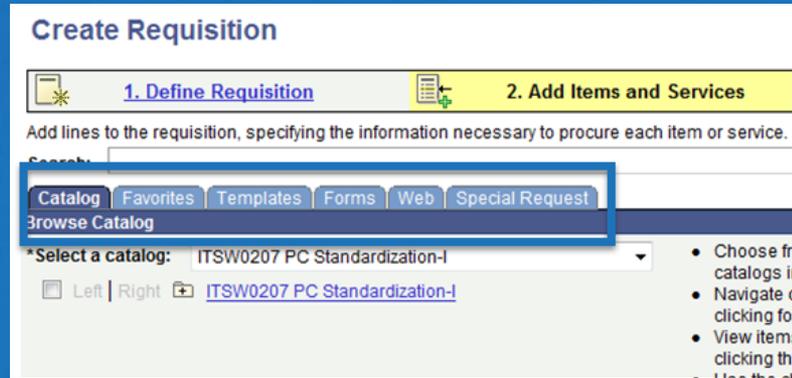
Enter the name of the req in the Requisition Name field.

Click the OK button at the bottom of the page.

REQ CREATION

In 9.2 the Tabs from 8.9 are expanded on the Create Requisition Page.

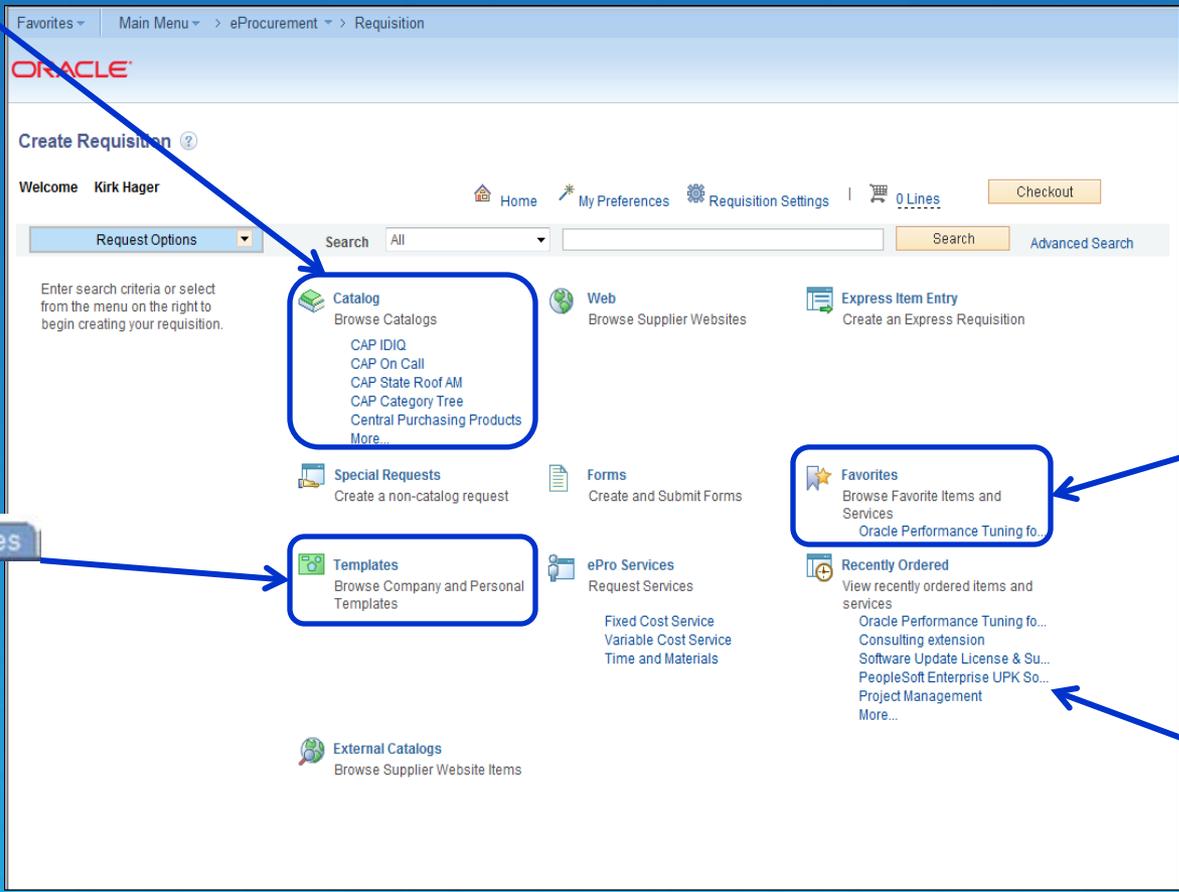
Make a selection to request items or services.



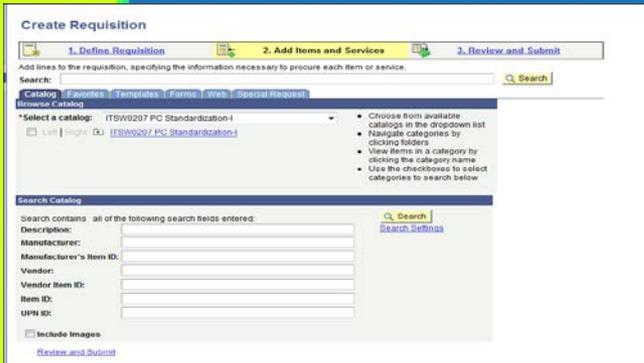
Catalog

Templates

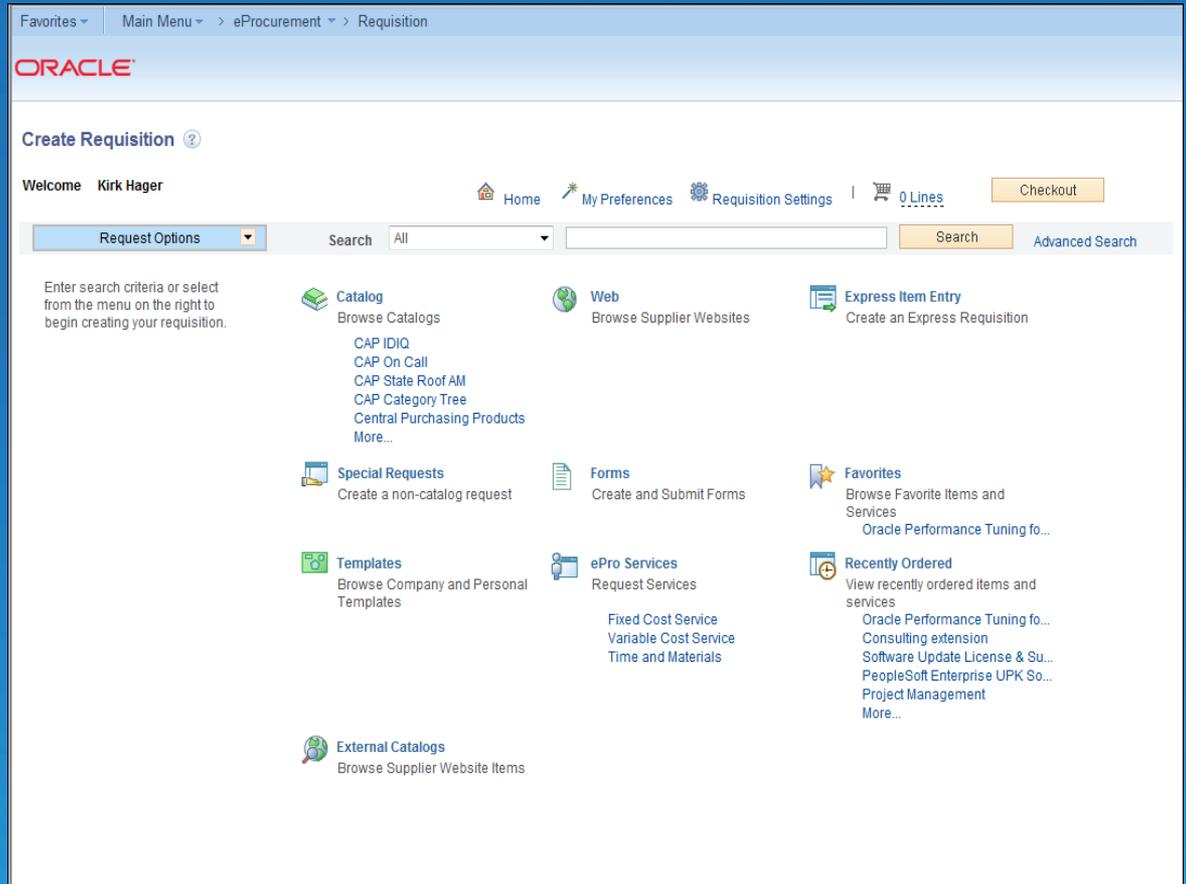
Favorites



REQ CREATION



Step 2: Select your items.



Select new items from a Catalog, use a Template, make a Special Request, or use the new Recently Ordered links.

- **All of the information required or needed to create a req in 8.9 is the same in 9.2.**
- **All reqs must at least have:**
 - **TBD as an account code.**
 - **Dept ID.**
 - **Bud Ref.**
- **CPOs are the only requesters required to know or provide other information.**

REQ CREATION

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: 00000 Mynt and Enterprise Services *Origin: USD *USD

*Requester: KHNGERREG *Kirk Hager *Currency: USD

Requisition Name: Meets OK (ETA Standard)? *Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	VSA-S Disposable Glass	QUALITY ENVIRONMENTAL CONTAINERS INC	1,000	Case	98.66	98.66

SW Exception: SS Flag: SS Type:

Total Amount: 98.66 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

[Find more items](#)

Step 3: Review and Submit.

Cart Summary: Total Amount 51,000.00 USD

Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	PAPER TOWEL-1-Fold 1-Ply Whit 9	1000002090	SOUTH CENTRAL INDUSTRIES INC	1,000	Case	51000.00000	51000.00			

SW Exception: SS Flag: SS Type:

Select All / Deselect All Select lines to:

Total Amount 51,000.00 USD

Shipping Summary

Requisition Comments

Enter requisition comment

Send to Supplier Show at Receipt Shown at Voucher

Approval Justification

Enter approval justification for this requisition

60

There is a new comment field called Requisition Comments. In base requisitions, it was called Header Comments and was not included in 8.9.

It allows for multiple comments and attachments at the Header level.

REQ CREATION

1

Step 3: Review and Submit.

2

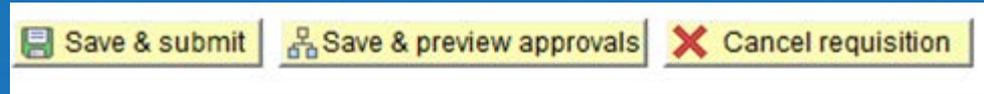
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		09003	1.0000	100.0000	51,000.00	090000	

To add funding information, expand the line with the arrow icon (1).

Then expand the Accounting Lines with the arrow icon (2).

Use the Chartfields2 tab to enter funding information.

SUBMIT THE REQ



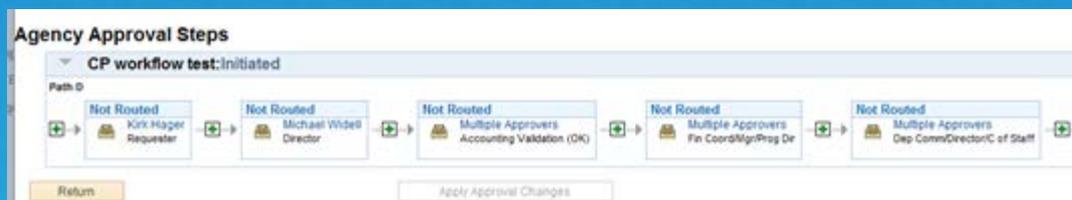
In 8.9, there are three options:

1. **Save & submit** is the only option that submits the req and starts the workflow process.
2. **Save & preview approvals** saves the req and opens the approval workflow. It **DOES NOT** submit the req.
3. **Cancel requisition** cancels the req.



In 9.2, there are four options:

1. **Save & submit** is the only option that submits the req and starts the workflow process.
2. **Save for Later** saves the req, but does **NOT** start the approval process.
3. **Add More Items** adds more items to the req.
4. **Preview Approvals** opens the approval workflow in order to see who the req will go to for approval (below). It does **NOT** start the approval process.



This document is a Delta Training document. Delta Training materials are not sufficient to complete the new-user training requirements for security access.

