PeopleSoft Finance
9.2 Upgrade
Requisitions

April 2018
Natalie Guillette

Schedule
Changes to expect
Communication and training
## Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test critical functionality</td>
<td>Feb 6-8</td>
</tr>
<tr>
<td>Test new delivered functionality / retest critical items as needed</td>
<td>Feb 20-22</td>
</tr>
<tr>
<td>ETS creates final upgrade environment</td>
<td>Mar 13</td>
</tr>
<tr>
<td>Functional user acceptance testing</td>
<td>Mar 20-22</td>
</tr>
<tr>
<td><strong>Go-live decision</strong></td>
<td><strong>Apr 5</strong></td>
</tr>
<tr>
<td>Reqs and Expense user lockout</td>
<td><strong>Apr 5 End of Day</strong></td>
</tr>
<tr>
<td><strong>Go-live weekend</strong></td>
<td><strong>5pm Apr 12 – 15</strong></td>
</tr>
<tr>
<td></td>
<td><strong>(system available Mon Apr 16)</strong></td>
</tr>
</tbody>
</table>
What Happens April 6th – 13th for Requisitions?

• All Requisition Access in PeopleSoft is “Turn-Off”. Users do not have the menu option like YE.

• All Requisitions previously submitted on the Buyers Worklist will have to be:

  1. Processed through to Dispatched Status (completed through process)
     * Requires proper documentation, completed forms attached to Req., approvals, valid budget check, etc.

  2. Incomplete Req’s will be returned to departments in
     * Pending Status and can be submitted properly after Go-Live – Monday, April 16th
CHANGES TO EXPECT

REQUISITIONS PAGE
9.1 Create Requisition Page

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.

Search:

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.

Review and Submit
New Look - 9.2 Create Requisition Page

Create Requisition

Welcome  Natalie Guillette

Request Options

Search

Catalog
Browse Catalogs

Depot Catalog
Purchasing Category Tree

Special Requests
Create a non-catalog request

Recently Ordered
View recently ordered items and services
Testing new Category
CAPP Service Agreement Testi...
9.2 Multiple Line PO Testing...
9.2 Testing for Large Blanke...
Testing Blanket Order >$500K...
9.1 Requisition Detailed Page – Out with “Vendor”
9.2 Requisition Detail Page – In with “Supplier”
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:** UVM01 University of Vermont
- **Requester:** dharvey Deborah Harvey
- **Currency:** USD
- **Priority:** Medium

### Requisition Lines

<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>Testing</td>
<td></td>
<td>1.0000</td>
<td>Each</td>
<td>1.00000</td>
<td>1.00</td>
</tr>
</tbody>
</table>

- **Select All / Deselect All**
- **Add to Favorites**
- **Add to Template(s)**
- **Modify Line / Shipping / Accounting**
- **Delete**

- **Total Amount:** 1.00 USD
- **Find more items**
## Checkout - Review and Submit

Review the item information and submit the req for approval.

### Requisition Summary

- **Business Unit**: UVM01
- University of Vermont
- **Requester**
  - *nguillet*
  - Natalie Guillele
- **Currency**: USD
- **Priority**: Medium

### Cart Summary: Total Amount 6,000.00 USD

Expand lines to review shipping and accounting details

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Testing new Category</td>
<td></td>
<td>Jet Service Envelope Co Inc</td>
<td>6.0000</td>
<td>Month</td>
<td>1000.000</td>
<td>6000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total Amount**: 6,000.00 USD
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Testing new Category</td>
<td></td>
<td>Jet Service Envelope Co Inc</td>
<td>6.0000</td>
<td></td>
<td>1000.00</td>
<td>6000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Shipping Address:**
- **Ship To:** UVM Purchasing Services, 205 Waterman Building, 85 South Prospect Street, Burlington, VT 05405
- **Attention To:** Natalie Guillette
- **Due Date:**

**Accounting Lines**

**Select All / Deselect All**

**Select lines to:** Add to Favorites, Add to Template(s), Delete Selected, Mass Change

**Total Amount:** 6,000.00 USD
Accounting Lines will appear under Requisition Lines

**Accounting Lines**

<table>
<thead>
<tr>
<th>Chartfields 1</th>
<th>Chartfields 2</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Op Unit</td>
<td>Dept</td>
<td>Fund</td>
<td>Source</td>
<td>Function</td>
<td>PC Bus Unit</td>
</tr>
<tr>
<td>60557</td>
<td>01</td>
<td>11552</td>
<td>100</td>
<td>100001</td>
<td>521</td>
<td></td>
</tr>
</tbody>
</table>

**Select lines to:**
- [ ] Add to Favorites
- [ ] Add to Template(s)
- [ ] Delete Selected
- [ ] Mass Change

**Total Amount**

6,000.00 USD
These Buttons Remain the Same!!
## Confirmation

Your requisition has been submitted.

<table>
<thead>
<tr>
<th>Requested For</th>
<th>Natalie Guillette</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Name</td>
<td>0000152939</td>
</tr>
<tr>
<td>Requisition ID</td>
<td>0000152939</td>
</tr>
<tr>
<td>Business Unit</td>
<td>UVM01</td>
</tr>
<tr>
<td>Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Not Checked</td>
</tr>
</tbody>
</table>

- Number of Lines: 1
- Total Amount: 6,000.00 USD

*No approvals required*

- [View printable version](#)
- [Edit This Requisition](#)
- [Check Budget](#)
Computer Depot – Requisitions

Create Requisition

Welcome Natalie Guilette

Request Options

Search

Catalog
Browse Catalogs

Special Requests
Create a non-catalog request

Depot Catalog
Purchasing Category Tree

Recently Ordered
View recently ordered items and services
- Testing new Category
- CAPP Service Agreement Testi...
- 9.2 Multiple Line PO Testing...
- 9.2 Testing for Large Blanke...
- Testing Blanket Order >$500K...
## Checkout - Review and Submit

Review the item information and submit the req for approval.

### Requisition Summary

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>UVM01</td>
</tr>
<tr>
<td>Requester</td>
<td>nguilet</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Requisition Name</td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
</tbody>
</table>

### Cart Summary: Total Amount 2,698.00 USD

Expand lines to review shipping and accounting details.

### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2.3GHz dual-core Intel Core i5</td>
<td>MPXR2LLUA</td>
<td>Computer Depot</td>
<td>1.0000</td>
<td>Each</td>
<td>1249.00</td>
<td>1249.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2.3GHz dual-core Intel Core i5</td>
<td>MPXU2LLUA</td>
<td>Computer Depot</td>
<td>1.0000</td>
<td>Each</td>
<td>1449.00</td>
<td>1449.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Shipping Summary

Multiple values exist for one or more schedules. Expand lines to see shipping details.

**Total Amount** 2,698.00 USD

### Actions

- Save & Submit
- Save for Later
- Add More Items
- Preview Approvals
# Communications & Training Plan

## Information sessions
- **Feb 21**: BFAN meeting
- **Mar 13**: EDU session
- **Mar 29**: BFAN meeting
- **Apr 4**: Req and T&E
- **Apr 12**: Req
- **Apr 18**: T&E

## Trainings
- **Apr 19**: Req
- **Apr 24**: T&E
- **Apr 26**: T&E approvers

## Open labs
- **Apr 23**: Req
- **Apr 27**: Req
- **May 1**: T&E
- **May 3**: T&E
QUESTIONS?