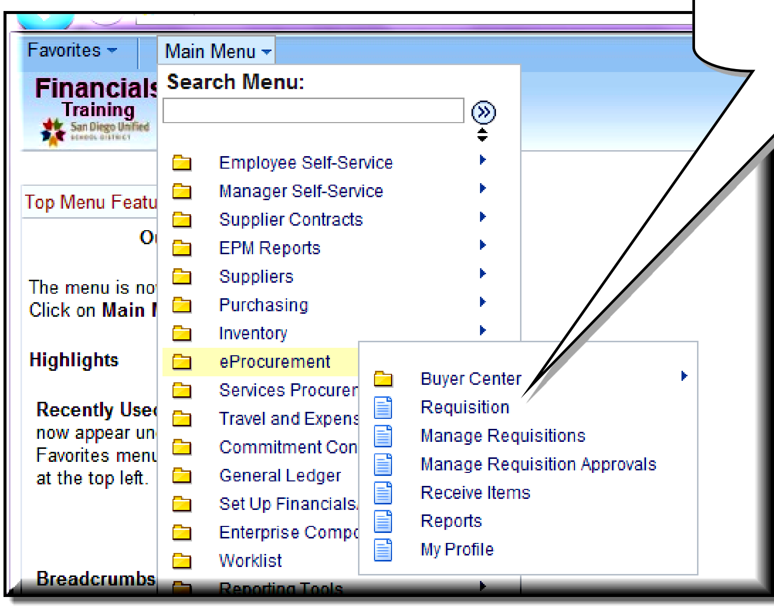
Requisition Settings for Special Request Items

Shortcut for Ordering Multiple Special Request Items

This Job Aid shows how to use the **Requisition Settings** feature in eProcurement to set up defaults for your **Special Request** items on a single order. You can enter information into a few of the fields, and have that same information populate those fields automatically for each Special Request item in that requisition. This works well when you order multiple items from the same supplier, or use the same budget for all items, or generally plan to use the same exact information in a given field for all the Special Request items on one requisition.

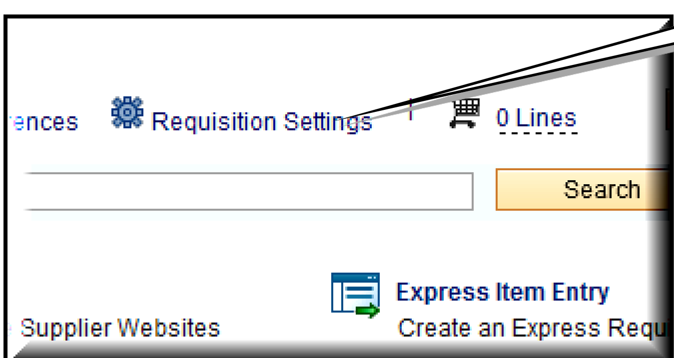
1. Start from the PeopleSoft Financials home page:

Click **Main Menu,** then click **eProcurement,** and then click **Requisition.**



2. On the eProcurement Home Page, in the upper right area, find **Requisition Settings**.

Click **Requisition Settings.**



3. On the Requisition Settings page, fill in whichever available fields *(text boxes)* you want to have show up automatically on each Special Request item you plan to add to this order. In the example shown below, we entered the following fields:

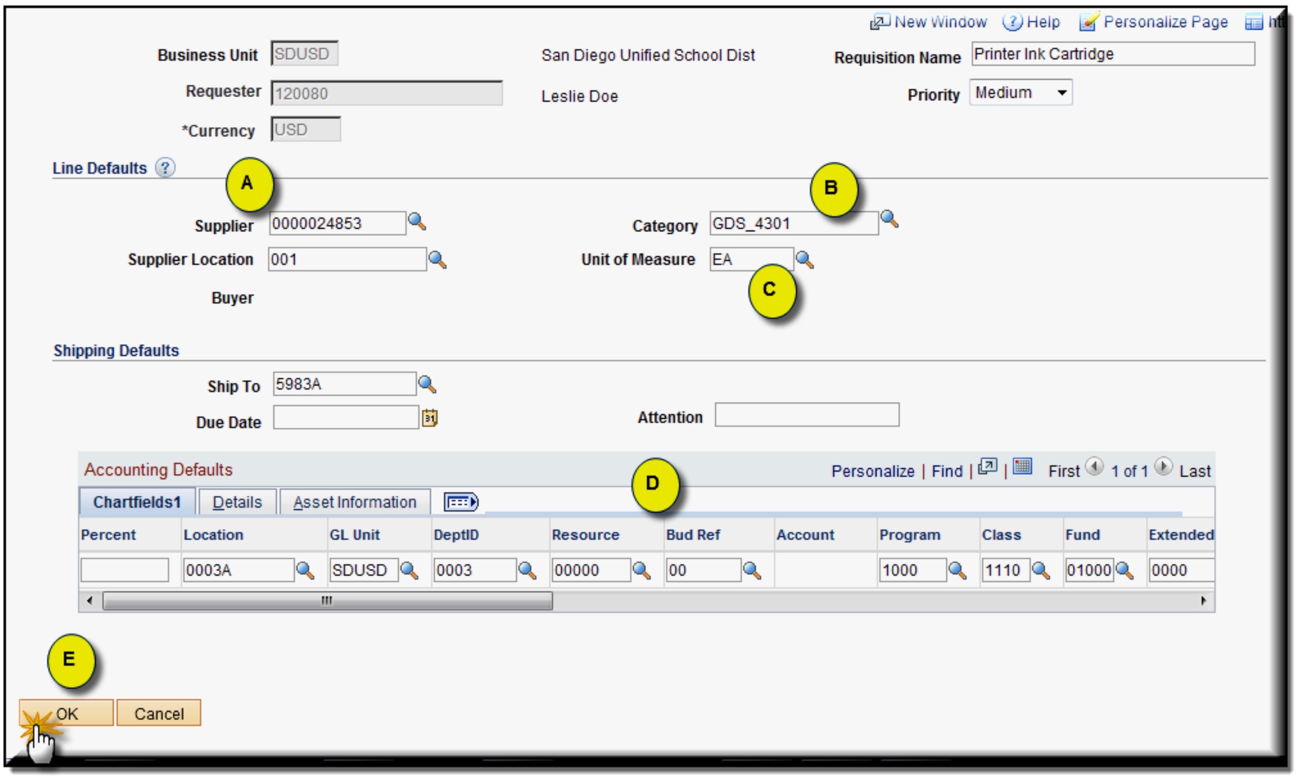
A. **Supplier**— We chose Meredith Digital from the Supplier (vendor) list.

B. **Category**— All items will be paid with the same budget, so we chose the GDS_4301 category.

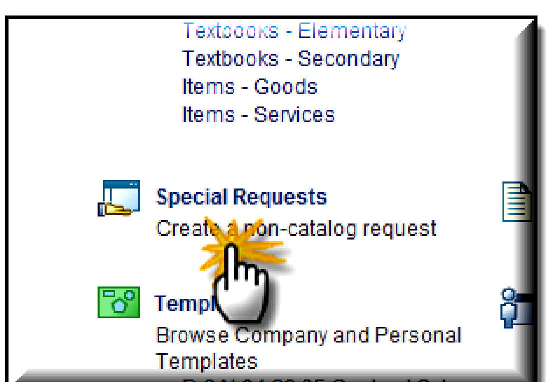
C. **Unit of Measure**—All items come packaged one to a package/unit, so we chose EA for “Each”.

D. **Chartfields**—We entered the budget string here so that all items will be paid with the same budget.

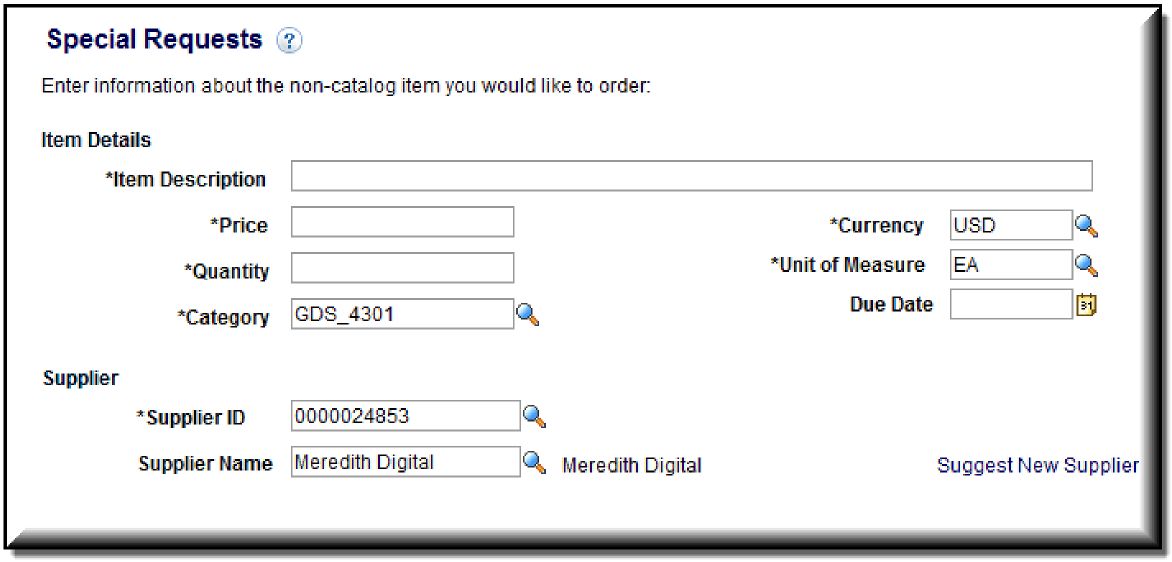
E. **OK**—When done entering the information, click the OK button.



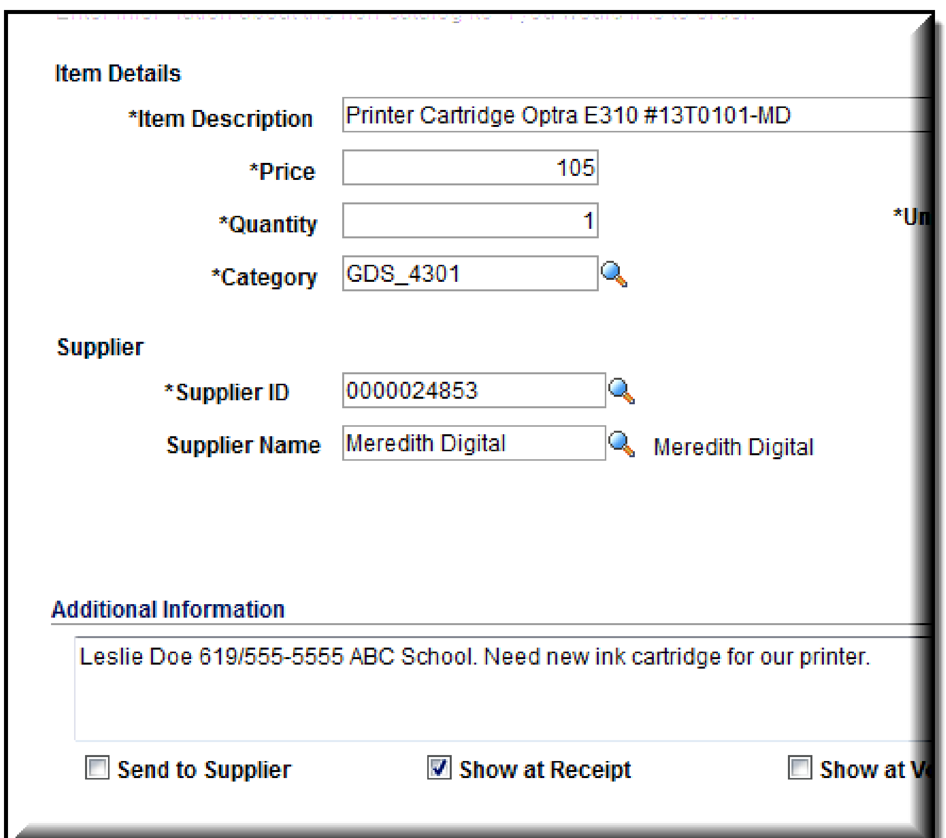
4. Click the **Special Requests** link to start adding items to this requisition. *(All the information you entered into the Requisition Settings page will now automatically fill in for each Special Request item you create for this one order).*



5. The Special Request screen is displayed, with the information you entered earlier from the Requisition Settings page *(Category, Supplier, etc.)*. This will save you time, as now you don't have to type all that information repeatedly for each item you add to this order.

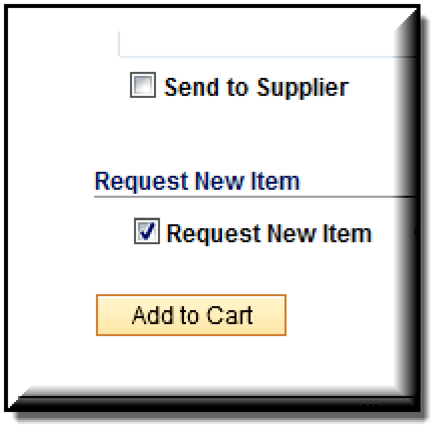


6. For the first example item below, we filled in the **Item Description, Price, Quantity**, and the required **Additional Information.**

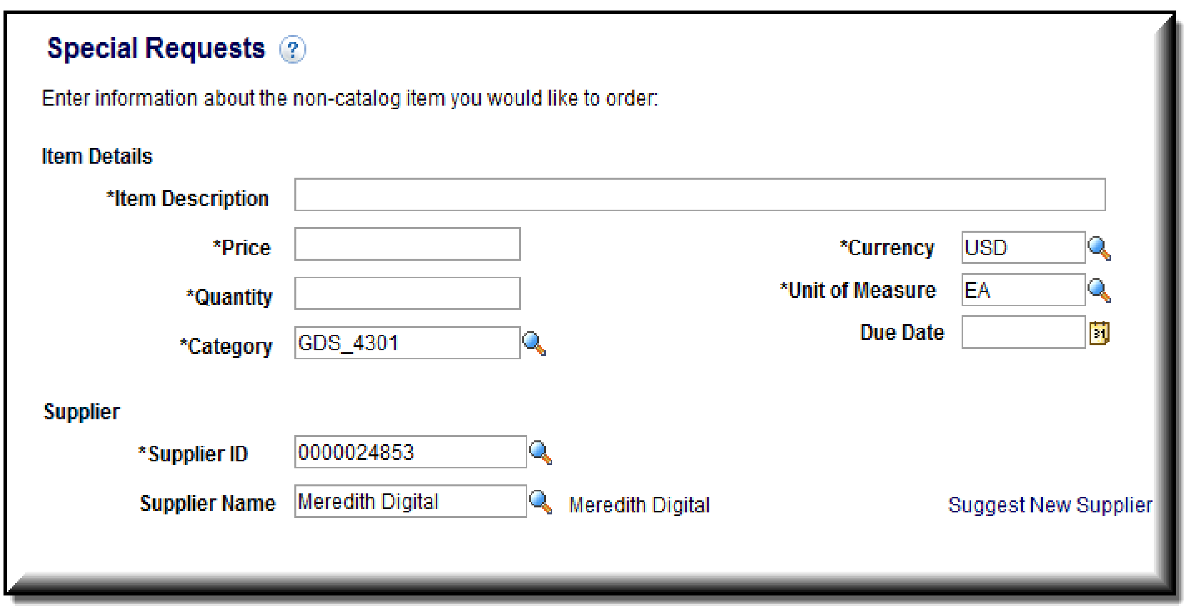


7. Since this printer cartridge is something we will be ordering again in the future, we decided to click a checkmark into the checkbox for **Request New Item**. This sends a request to the Strategic Sourcing Department, asking to have this item added as a Catalog *(stock or inventory)* item. If it's accepted as such, the next time we order this item we might be able to find it as a Catalog item, instead of having to order it as a time-consuming Special Request item.

Click the **Add to Cart** button to add this item to your requisition.

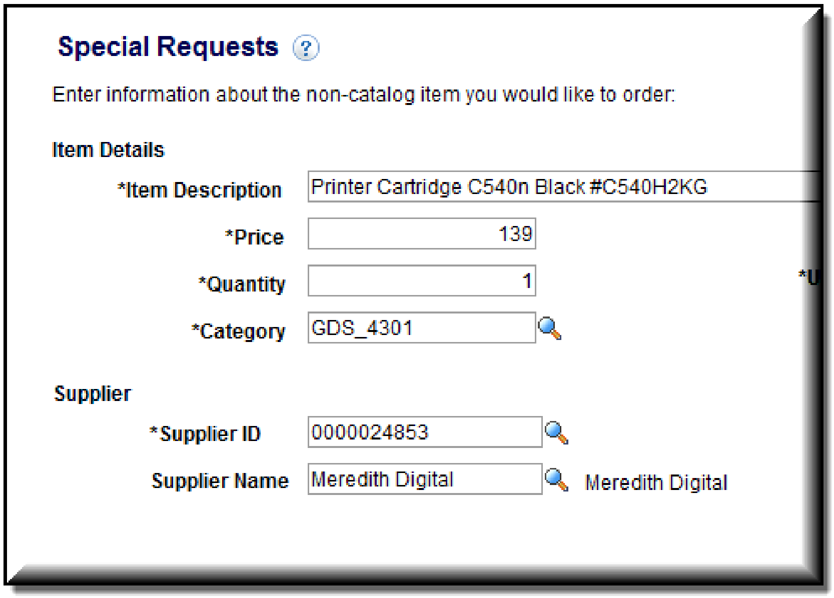


8. A fresh, blank Special Request screen is displayed, to allow us to order another item. The same fields are automatically filled in for us once again, to save time, since the next item we want to order will be from the same Supplier, and will use the same Unit of Measure, and the same Category and Budget.

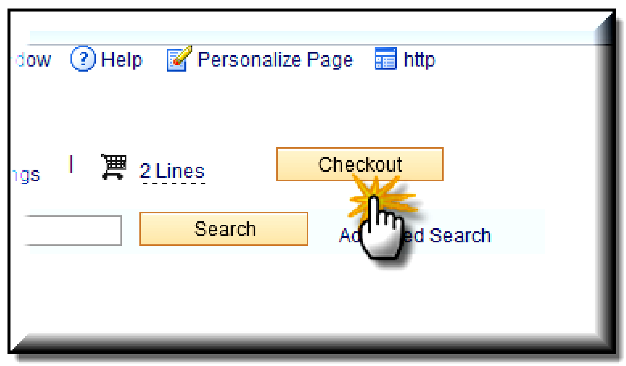


9. For our next item we fill in the required fields again ***(Item Description, Price, Quantity)***. This time we're ordering a different printer cartridge for another printer used in our department.

When done, we click the same **Add to Cart** button as before *(not pictured here)*.



10. The two printer cartridges are all we want to order on this requisition. In the upper right corner, click the **Checkout** button to go to the Checkout page *(used to be called the Review and Submit page)*.



Complete the requisition normally:

A. Run the Budget Check to pre-encumber the funds.

B. Save and submit the requisition.

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Staff —> Technical Support & Resources —> PeopleSoft