PeopleSoft Requisitions

August 2, 2018

Prepared by Nancy Stasch x 2329

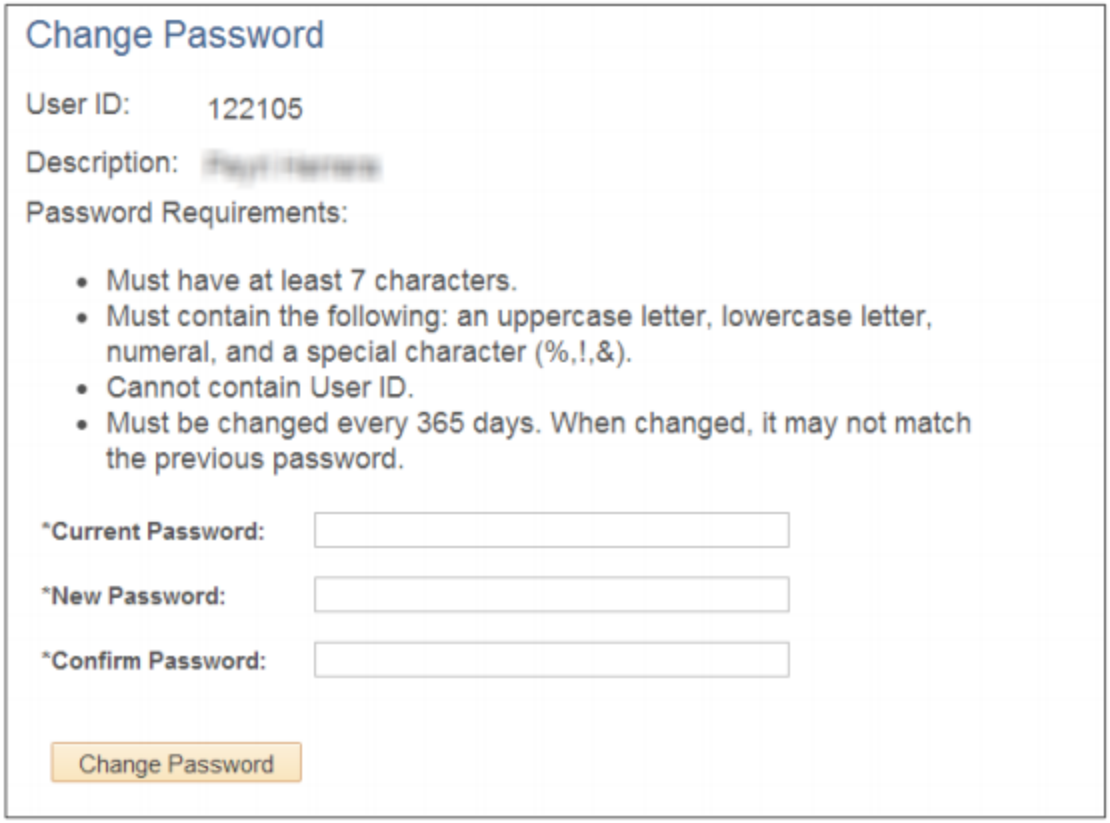
Below are the steps to login to PeopleSoft for 1st time users. Be sure to set up the "Forgot Your Password" information in case you need to use this in the future, (See next page). If you need assistance in resetting your password, please contact Tracy Fransway in the Technology Department. She can be reached at tracy.fransway@santeesd.net or by calling (619) 258-2244.

Password Requirements

The first time you log in to the PeopleSoft Portal, you will need to use the default password given to you. Upon login, you will be prompted to change your password. Here are the password requirements.

Default Password	Password Requirements
▪ FIRST 4 LETTERS OF LAST IN CAPS + Last 4 of SSN *Caldwell would be CALD9999*	▪ Must have at least 7 characters. ▪ Must contain the following: an uppercase letter, lowercase letter, numeral, and a special character (%,!,&). ▪ Cannot contain User ID. ▪ Must be changed every 365 days. When changed, it may not match the previous password.

This is what the **Change Password** screen looks like:



Remember, if you need to change your password at any time, log into the Portal and go to **Main Menu > Change My Password** (shown on p.9). Always change your password from the Portal Main Menu.

Below are some basic points to keep in mind when using PeopleSoft:

PeopleSoft is web-based. Access is from work only.
You can use Chrome, Firefox, Internet Explorer (IE), Opera, and Safari.

In order to access PeopleSoft applications, you need to be set up as a user with roles.
Your level of access to the Finance and HCM applications is based on the types of things you need to see and do in PeopleSoft. This is determined by your district. Every user is set up with the same basic access to the Portal.

Don't hit your browser's Back button!

Use **Home**, **Return to Search**, and other links within PeopleSoft to go back to previous pages—don't hit Back in your browser!
If you use your browser's Back button, your transaction might not be saved or you might experience odd behavior.

Periodically clear your cache.
When you use PeopleSoft, you should periodically clear your browser cache to allow your browser to function more efficiently. Directions are on p.38.

Be aware of the 90-minute timeout.
If you don't use PeopleSoft for 90 minutes, the screen will timeout. Please be aware that if you have multiple windows open, including the Portal, and you don't touch one of those screens within 90 minutes, all open PeopleSoft windows will time out.

Don't share your password.
Log into PeopleSoft with only your ID and password, and never share this information with anyone else.

Clearing your Cache in your computer periodically will help PeopleSoft run more efficiently. Here is how to do this:

Clearing Your Cache

When you use PeopleSoft, you should periodically clear your cache to allow your browser to function more efficiently.

Directions: Find your browser in the grid below and follow the directions to clear your cache. If you don't see your specific version or browser, search your browser's Help menu for "clear cache." If you're unsure what browser version you're using, from the Help menu, select About [*browser name*]. In Internet Explorer and Firefox, if you don't see the menu bar, press Alt.

Chrome

- In the browser bar, enter: *chrome://settings/clearBrowserData*
- Select the items you want to clear (e.g., **Clear browsing history**, **Clear download history**, **Empty the cache**, **Delete cookies and other site and plug-in data**).
- From the **Obliterate the following items from** menu, you can choose the period of time for which you want to clear cached information. To clear your entire cache, select **the beginning of time**.
- Click **Clear browsing data**.

Firefox

- From the **Tools** or **History** menu, select **Clear Recent History**.
  NOTE: If the menu bar is hidden, press Alt to make it visible.
- From the **Time range to clear:** menu, select the desired range; to clear your entire cache, select **Everything**.
- Click the down arrow next to "Details" to choose which elements of the history to clear. Click **Clear Now**.

Internet Explorer 7

- From the **Tools** menu in the upper right, select **Delete Browsing History...**
  - To delete your cache, click **Delete files...**
  - To delete your cookies, click **Delete cookies...**
  - To delete your history, click **Delete history...**
- Click **Close**, then click **OK** to exit.

Safari

- From the **Safari** menu, select **Reset Safari...**
- From the menu, select the items you want to reset, and then click **Reset**. As of Safari 5.1, **Remove all website data** covers both cookies and cache.

Information to find reference/training guides for PeopleSoft.

Go to the PeopleSoft Home Page and click on the Resources tab.

Or type in crc.sdcoe.net in your browser.

Type a key word for the materials you are looking for and click search.

TYPE KEY WORD HERE | Search this site

SDCOEcrc

CUSTOMER RESOURCE CENTER

Home | Our Services | Announcements | Calendar & Training | Resources | Links | Contact Us

Resources > PeopleSoft Resources >

Guides and Job Aids

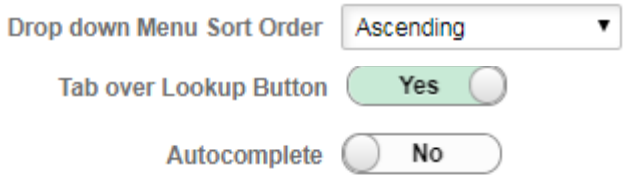
All posted Finance guides are current. These are the materials used for Group 4 training in Feb/March 2016.
All posted HCM guides are current. These are the materials used for Group 4 training in May/June 2016.
As edits are made, the CRC will continue to upload the newest versions.

Personalizing Peoplesoft can save a lot of time.

The personalizations that we have found to be most helpful are:

- Turning off “Autocomplete.”
- Changing the Menu Sort Order to Ascending.
- Tabbing over the Look-up button.

Go to Main Menu – My Preferences from drop down
In Navigation Personalizations, make these changes:



“Drop down menu sort order”: Choose Ascending.
“Tab over lookup button”: Change to Yes
“Autocomplete”: Change to No

Hit SAVE at the top right.

To navigate through PeopleSoft, you move through paths named “Breadcrumbs.”

You can also open multiple windows by clicking on “New Window” in the upper right portion of your screen.

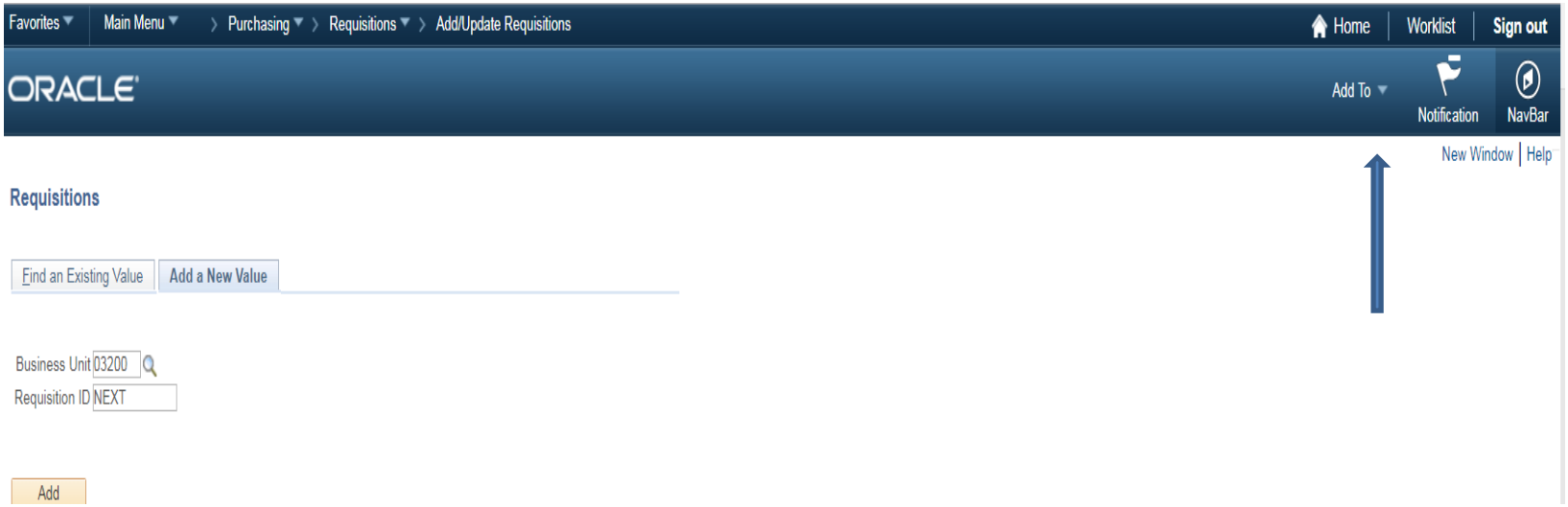
Using Favorites, Breadcrumbs, and Home

Directions: Use Favorites, Breadcrumbs, and Home to navigate.

- **Favorites =** Quickly go to recently used screens and reports. Go to screens you have saved as favorites. NOTE: Your recently used list will not update if you close the browser without signing out or if your session times out.
- **Breadcrumbs =** Navigate from the path that got you to where you are now. (You don't always have to start from Main Menu.)
- **Home =** Go back home.

IMPORTANT! Don't click the Back button in your browser! As an alternative, click Home, the last part of your Breadcrumb, or a link on the screen that takes you back.

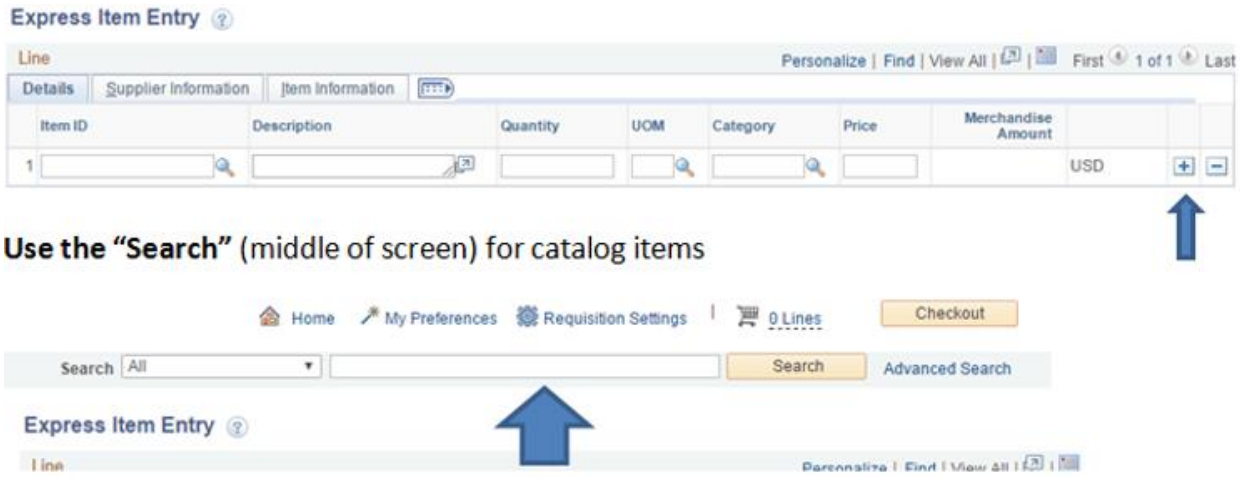
For the screens that you will be using over again, just add them to your favorites lists. This will save you having to navigate through the breadcrumbs each time to get to where you want to go.
Navigate to the screen you wish to use, then click on the drop down arrow at “Add To” and click on Favorites.



EXPRESS ITEM ENTRY REQUISITIONS:

BREADCRUMBS: Main Menu (top left), **eProcurement, Requisition**

You can add lines by clicking on the (+) at the end of the line:



To find an item: Type a word of the item you are looking for such as paper, pen, ink, etc. ….. Or just type in the warehouse stock number if you already know it.

Click the box next to the line item to choose that item. Then type in the quantity and click the Add to Cart button.

Click on the Check Out button (top right).

If you need to add more items, click the plus sign that says Add More Items in the middle of the screen.

Click the Select All/Deselect All box (middle left)

Click the Mass Change link (middle right). Leave "Line Information" (supplies, etc.) blank.

Click Ship To hourglass (at center) and choose YOUR SITE (do not choose warehouse 0000000078) *Note, When doing Warehouse order, never choose 0000000078 as your "Ship To" or it will turn your order into a Purchase Order and Purchasing will delete it.

Fill in Attention field (this can be whoever will be getting the supplies ordered).

At the bottom, in the accounting lines, choose location (your site).

Leave 03200 in the GL Box – Or add it if it is not there.

Fill in the account number in the following boxes:

- **Fund (always 0100). Except Project Safe (6300) and a few other dept's.**
- **Location** (your site)
- **Resource** (here you will find LCFF, Donations, Title 1, etc…) Refer to your chart of accounts or reference sheets for your available chart strings.
- **Goal**
- **Function**
- **Object**
- **Site:** This will always be your site for STORES Orders. Scroll over to see it.

Click OK.

Shipping Information

Ship To Location 0000000064

Address Add One Time Address

Due Date

Due Date: Leave Blank

Attention

Fill in Attention to who will get the item(s)

Comments

DO NOT USE THIS COMMENTS AREA

Accounting Lines

Accounting Information — Personalize | Find | First 1 of 1 Last

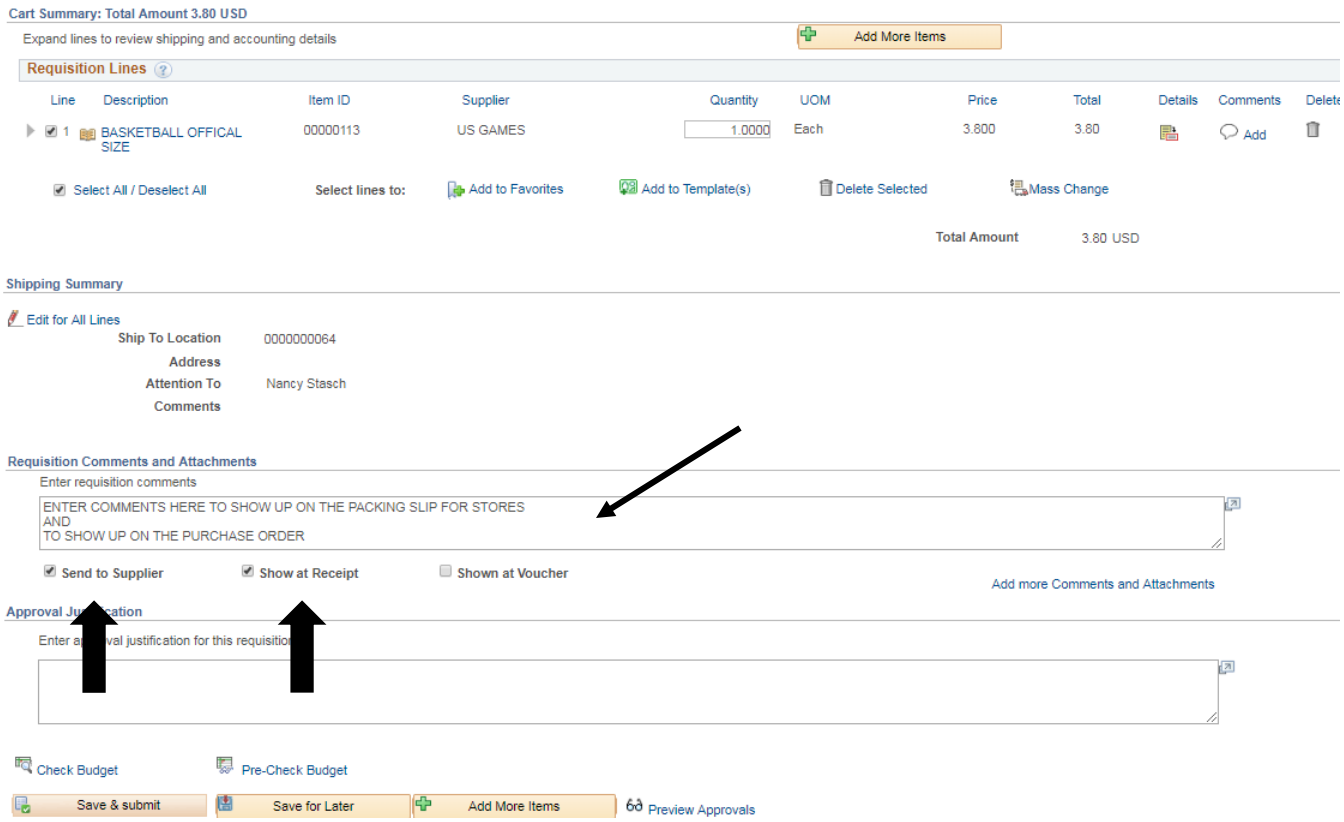
Chartfields1 | Details | Asset Information

		Location	GL Unit	Fund	Resource	Goal	Function	Object	Site
1		0000000064	03200	0100	0000000	0000	7200	4300000	064

Then Click OK again at All Distribution Lines

VERY IMPORTANT – Type in "Warehouse" in the Requisition Name Box for future references.

To Add Comments: Use the Comments Box at the Bottom of the Cart Summary screen for comments to show up on the Packing Slip AND so an outside supplier will see the comments



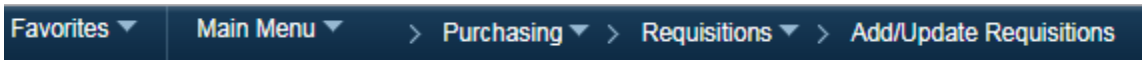
Scroll down and click "Save & Submit… Do NOT check budget until after the Save & Submit is done.
Once saved, click check budget and look to see if the requisition is pending and valid. If there is an error, you will need to correct it.

ADD/UPDATE REQUISITIONS:

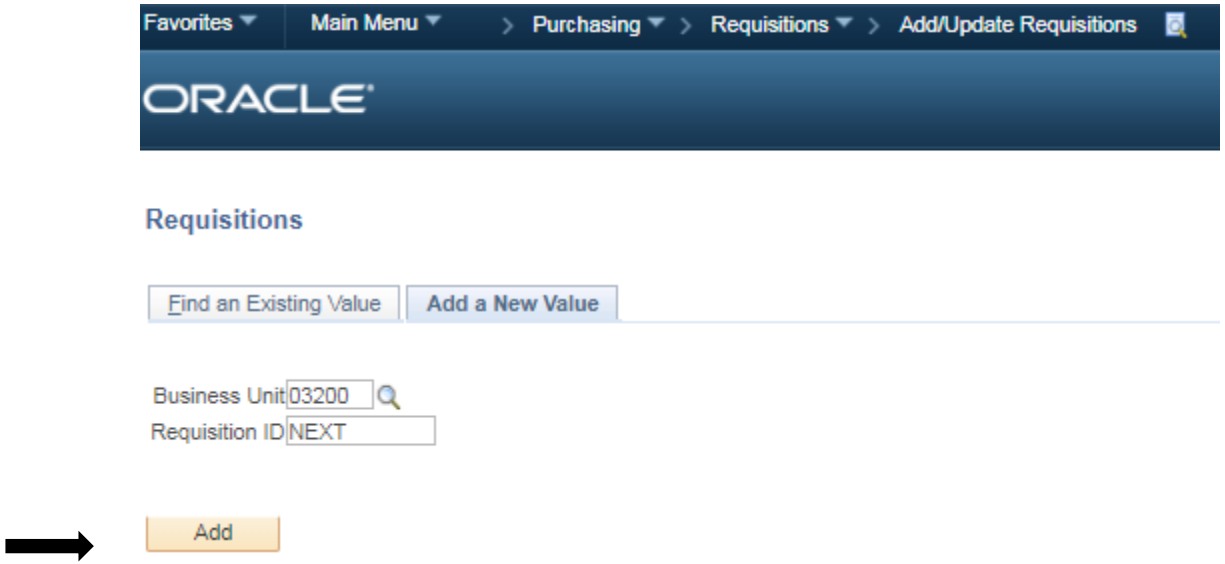
The Add/Update Requisitions entry is the preferred method to use by Purchasing. It has a broader reach and the views are easier to find.

This method can be used for Warehouse Orders also, There are more fields to use.

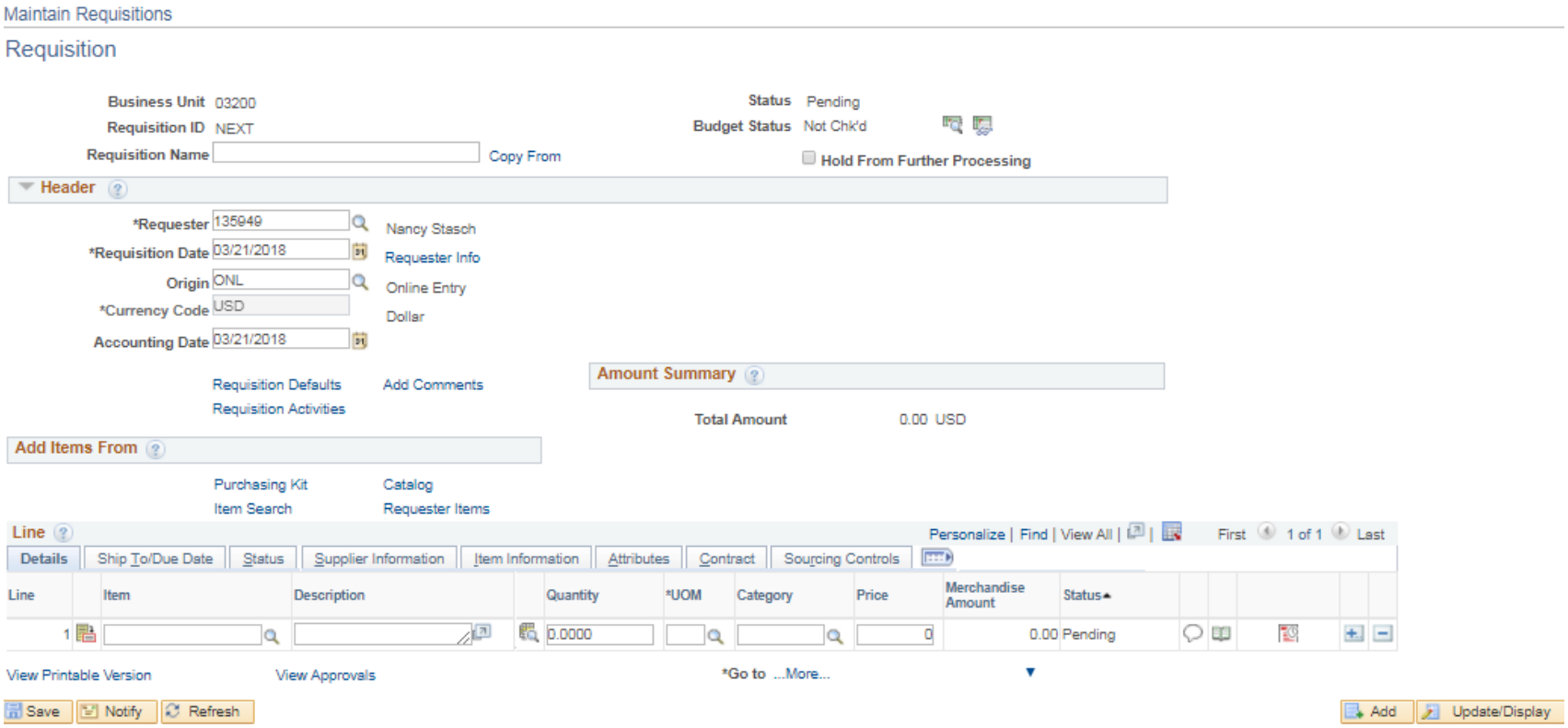
The breadcrumbs are as follows: (Don't forget to add to your "favorites" list)



For new requisitions, click on the ADD icon:

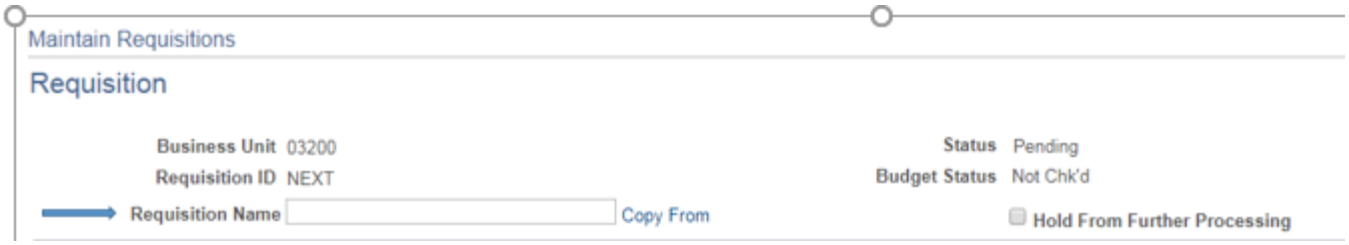


This will bring up the Maintain Requisitions Screen (see next page)

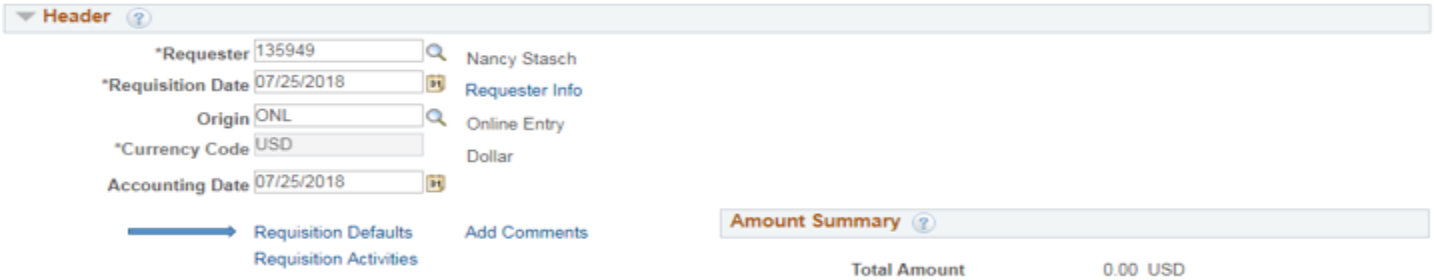


This requisition format allows for easier access to all areas of the requisition. Let's work from the top down.

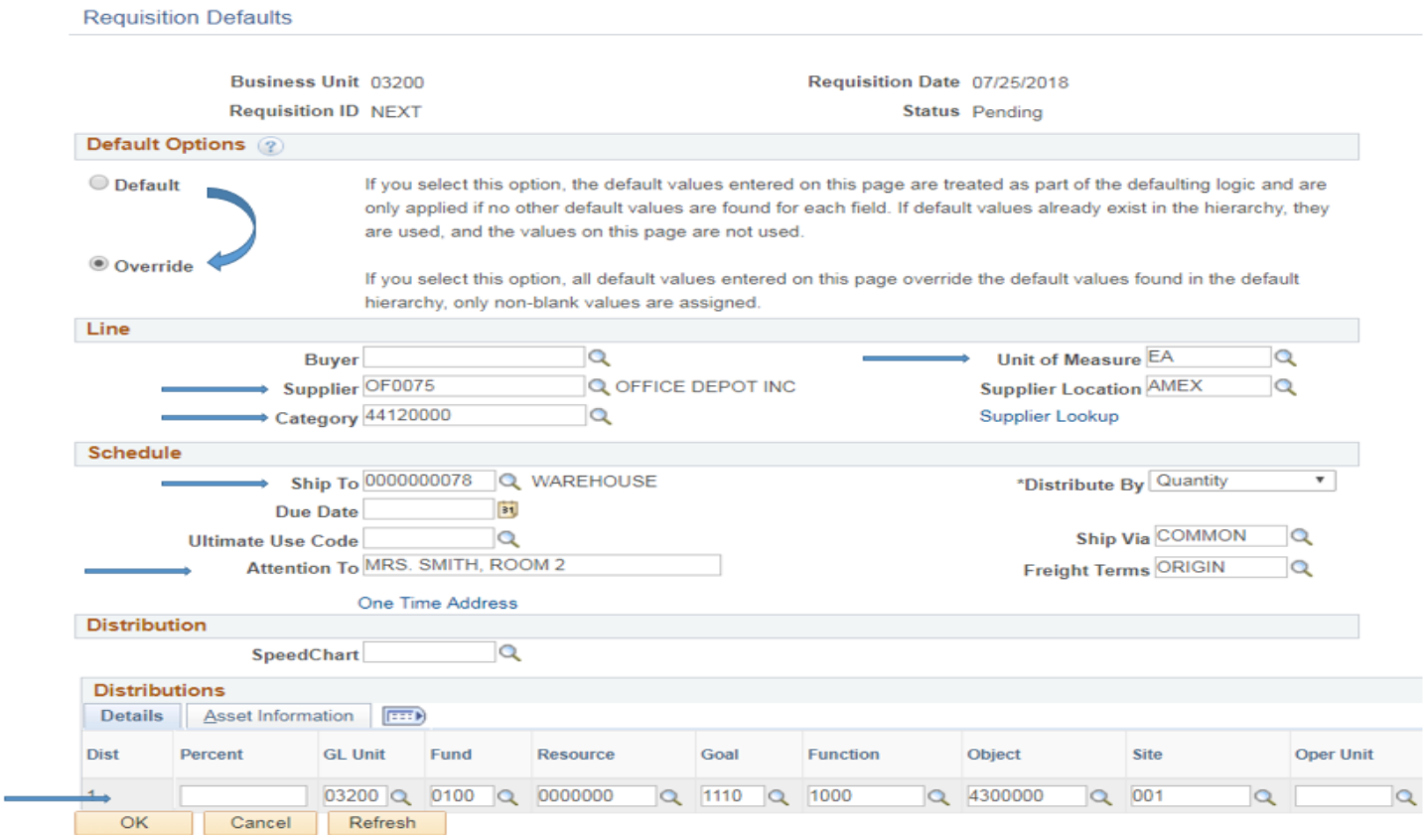
1. **You can name your req. in the Requisition Name area at the top of the req.:**



2. Click of Requisition Defaults to begin adding the pertinent information:

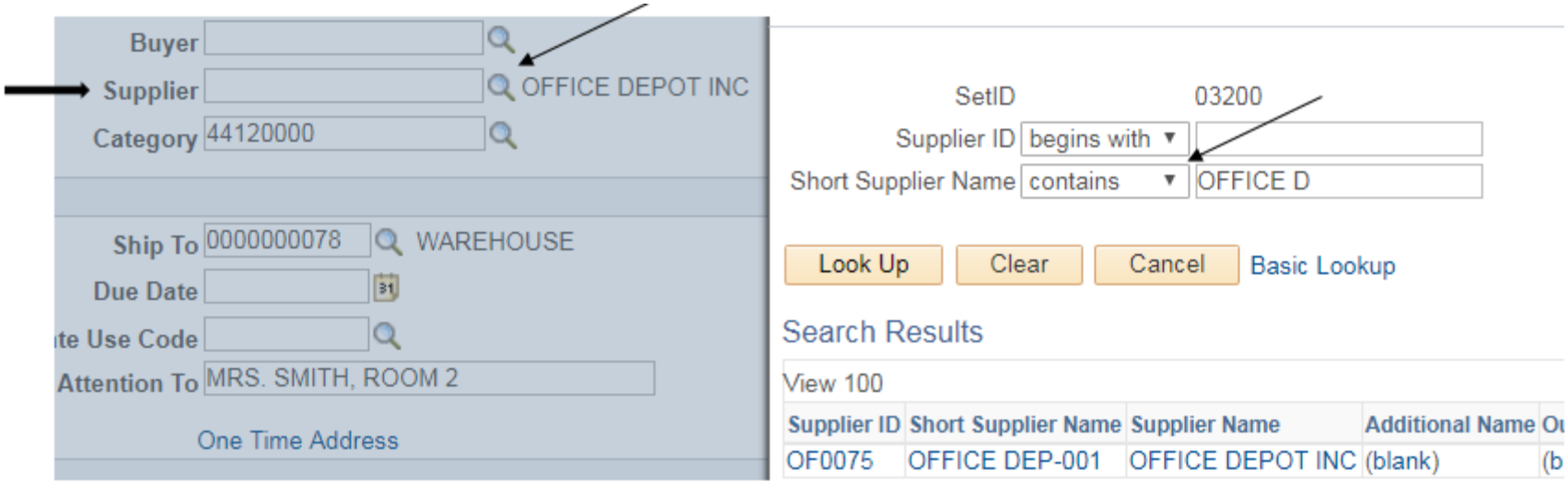


3. This brings up a new screen where you can add the Supplier, UOM, Category Code, Ship to, Attention to, and chart string all at once. IMPORTANT – CHANGE DEFAULT TO OVERRIDE.

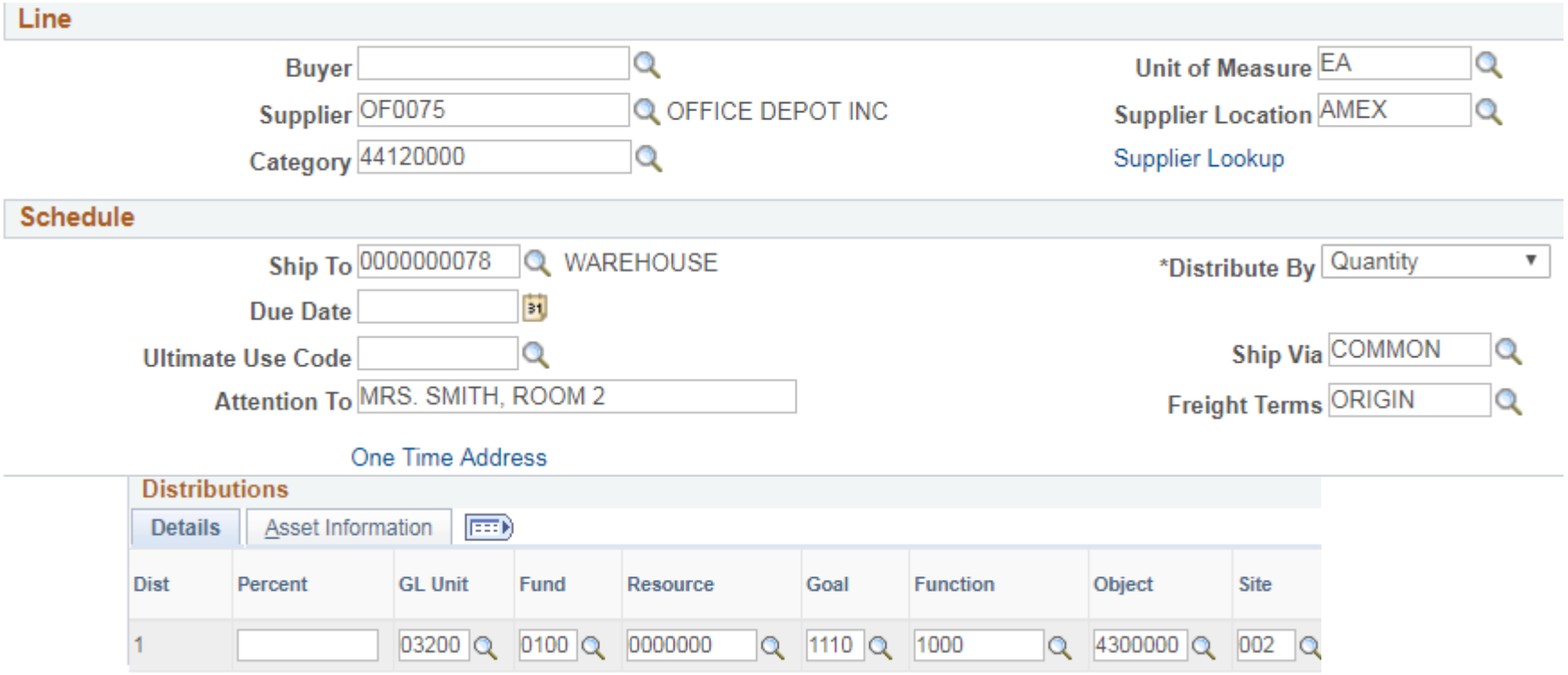


4. Default is already selected; however, if you ever need to change / update anything after requisition is made, you will need to switch to "override".

5. To find a supplier, click on the look-up icon, change to contains, and begin typing in the name of the vendor. From their you should see a list to pick from, and select the one you want.

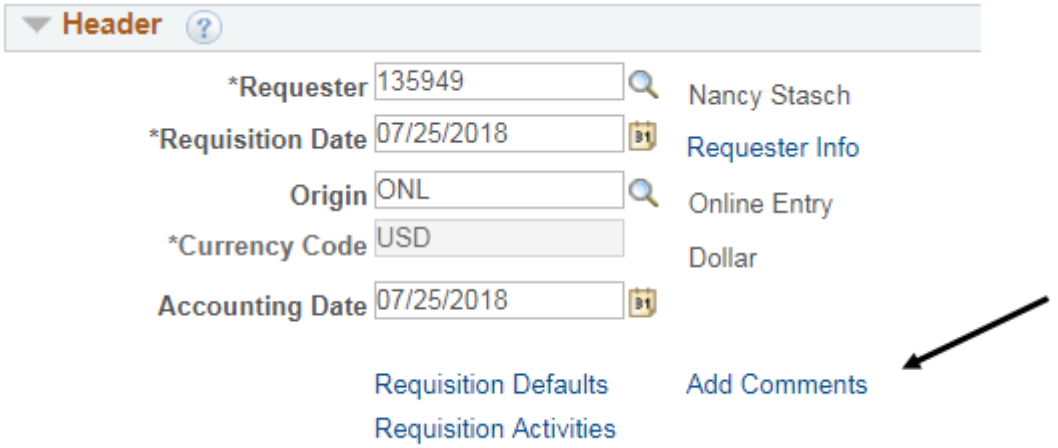


6. Do the same for the unit of measure, category code and ship to if you don't know what to pick. Always ship outside order to the warehouse/receiving using 0000000078. STORES orders ship to site.

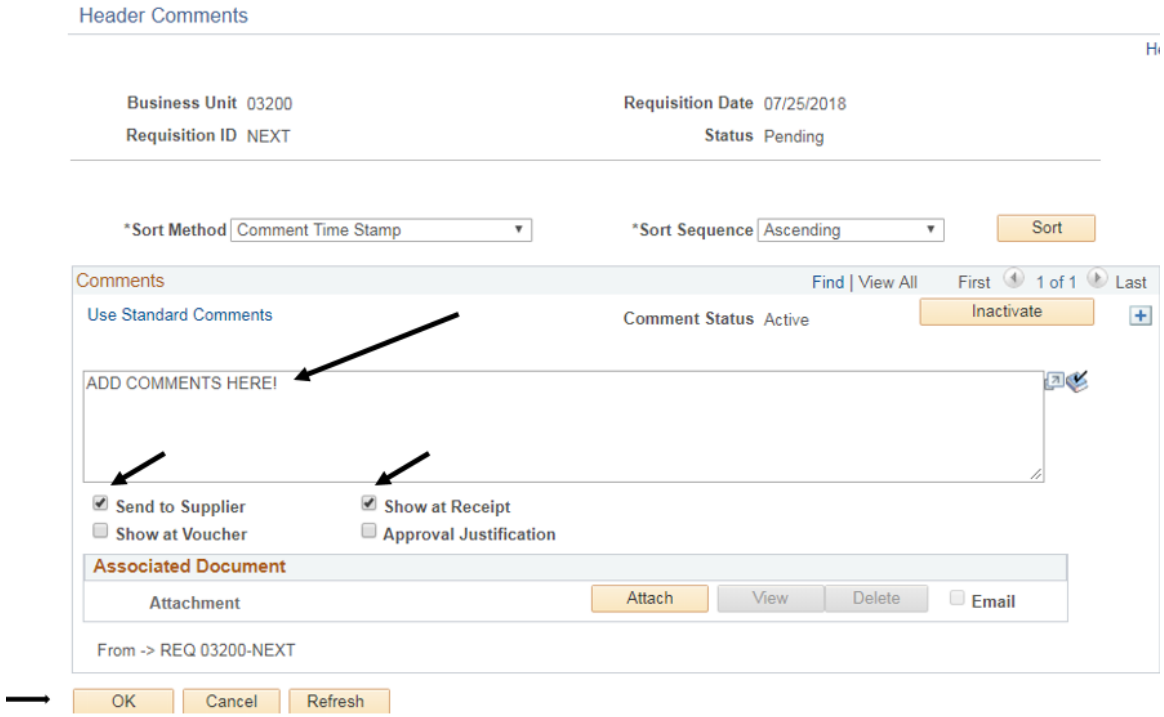


Click on "OK" at the bottom and the Defaults screen returns to the 1st

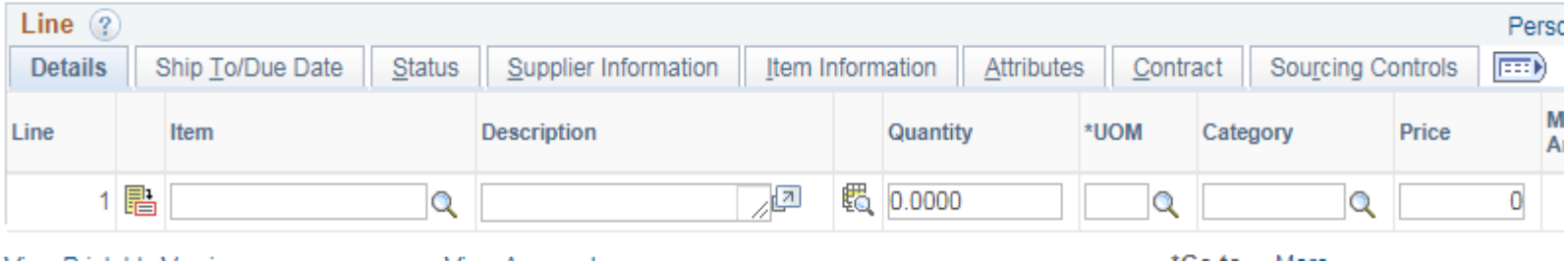
7. Add Comments here:



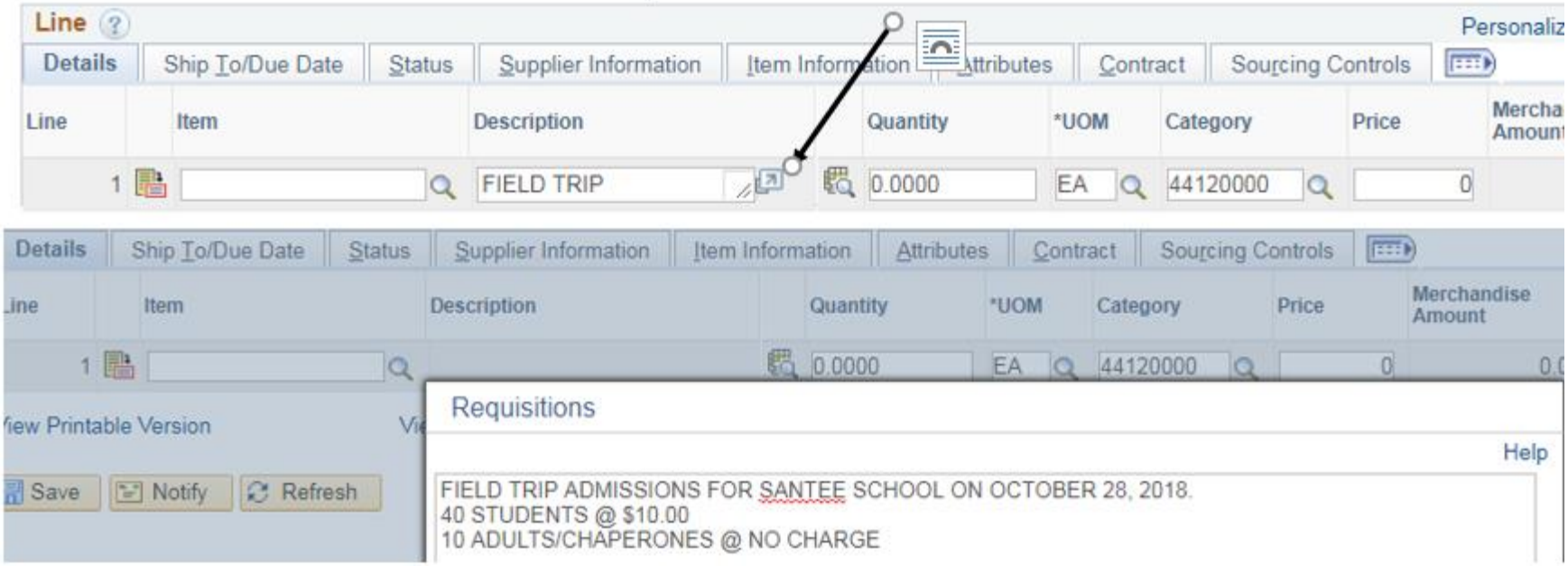
This screen will pop up. Please check on the appropriate boxes so the comments can be viewed:



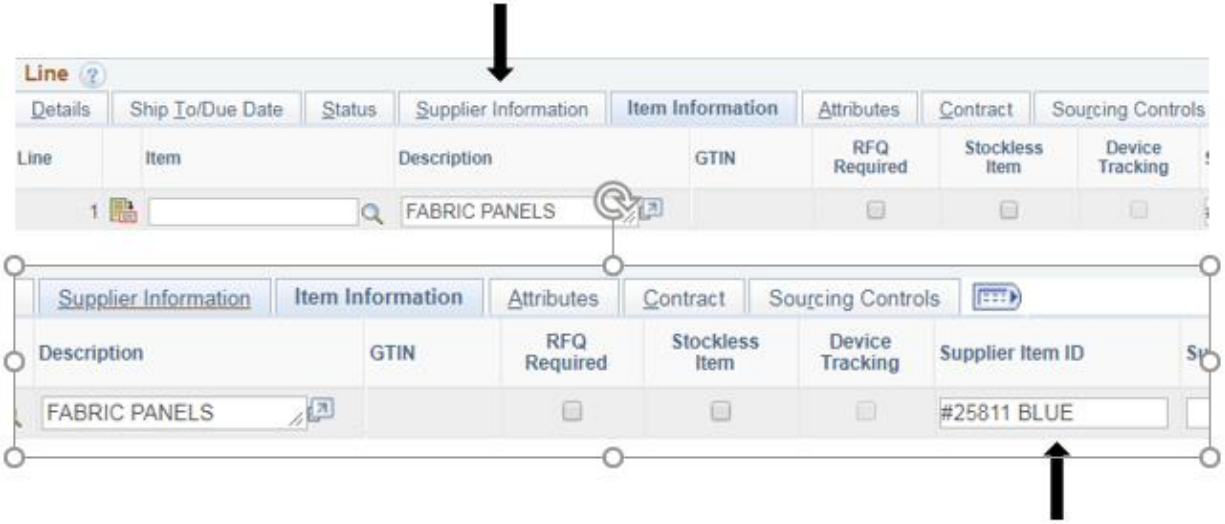
8. This is where you'd add everything for the vendor to see. Fill in Description, Quantity, and Price. The UOM, & Category were already added in the "Req. Defaults"



To add a Description, click on the Description Arrow and another box will pop up to type in all the information.

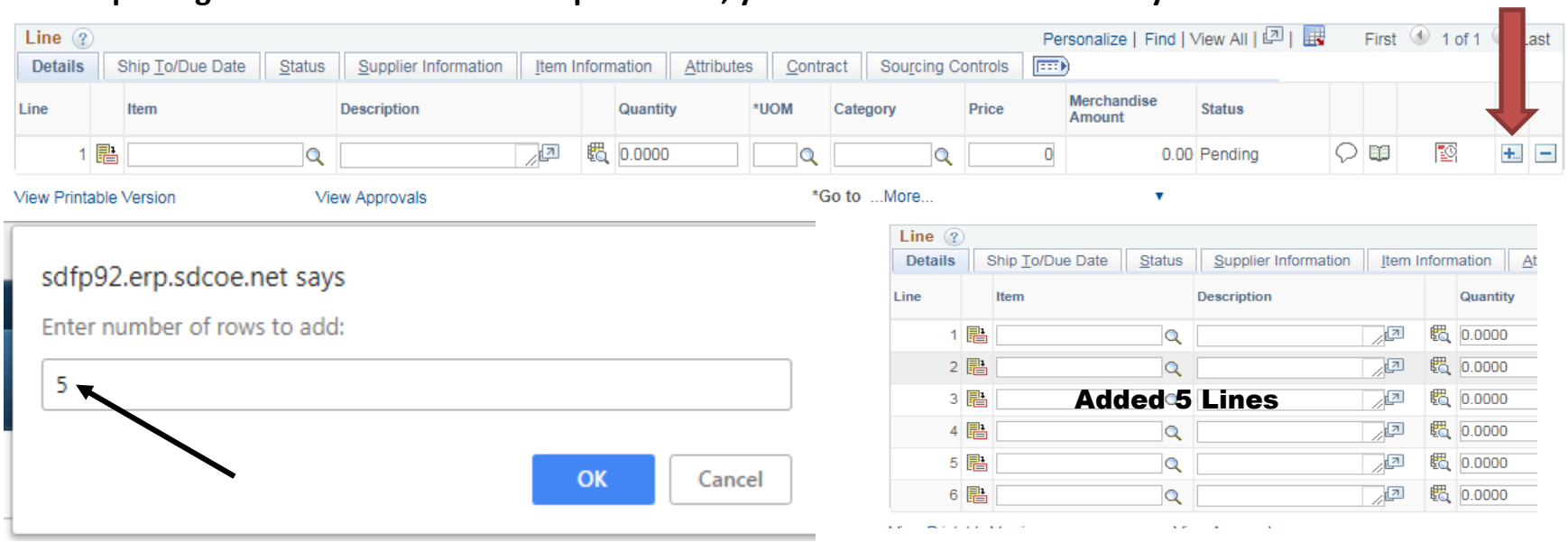


9. To add a vendor item #, click on "Supplier Information." Fill in the Supplier's Item # here.

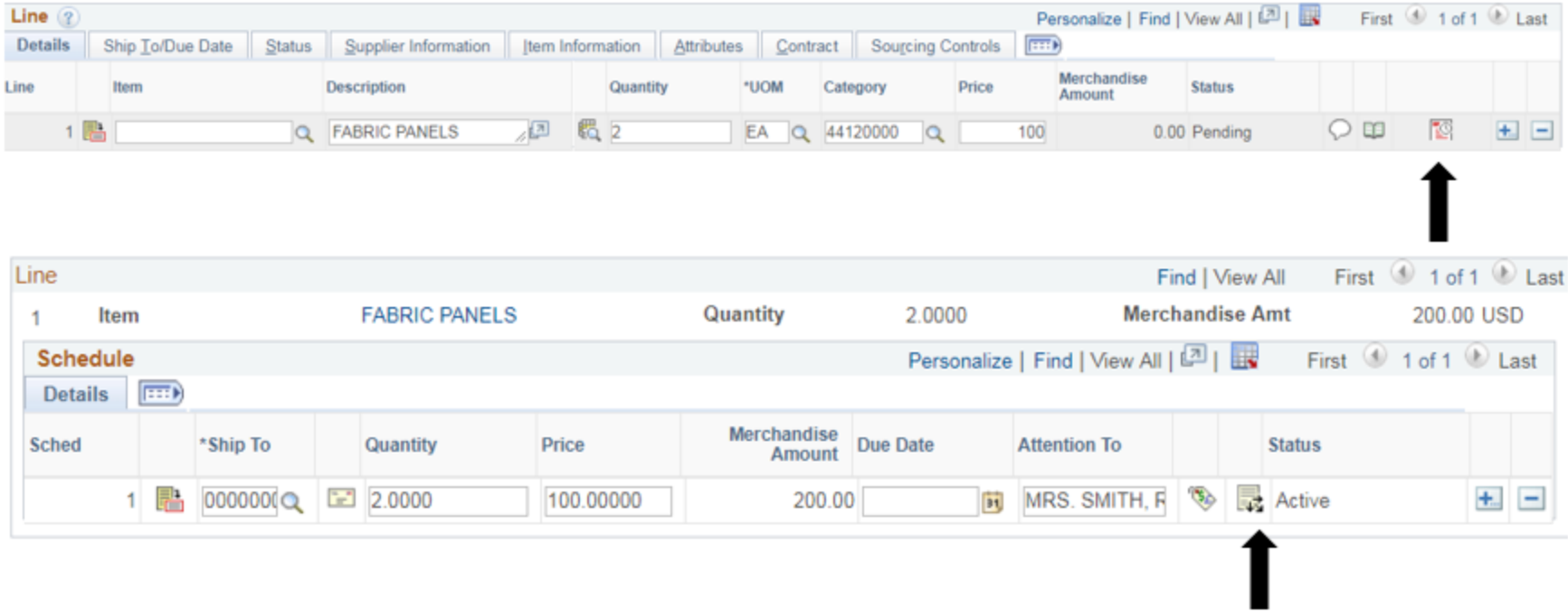


When done, click on details and this will bring you back to where you started.

When placing STORES orders with multiple entries, you can add more than 1 entry line at a time:

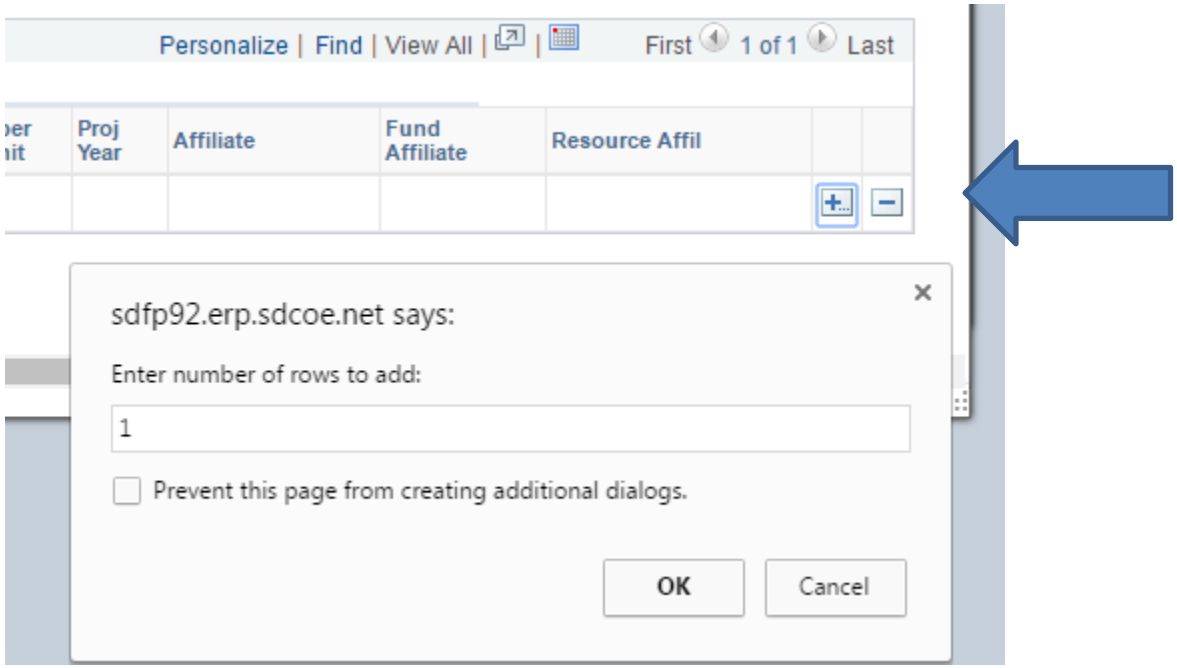


10. To split a budget, after entering all the information you can, click on the Schedule Icon button below. When the next screen opens up, click on the Distribution Icon. (see second screen shot)

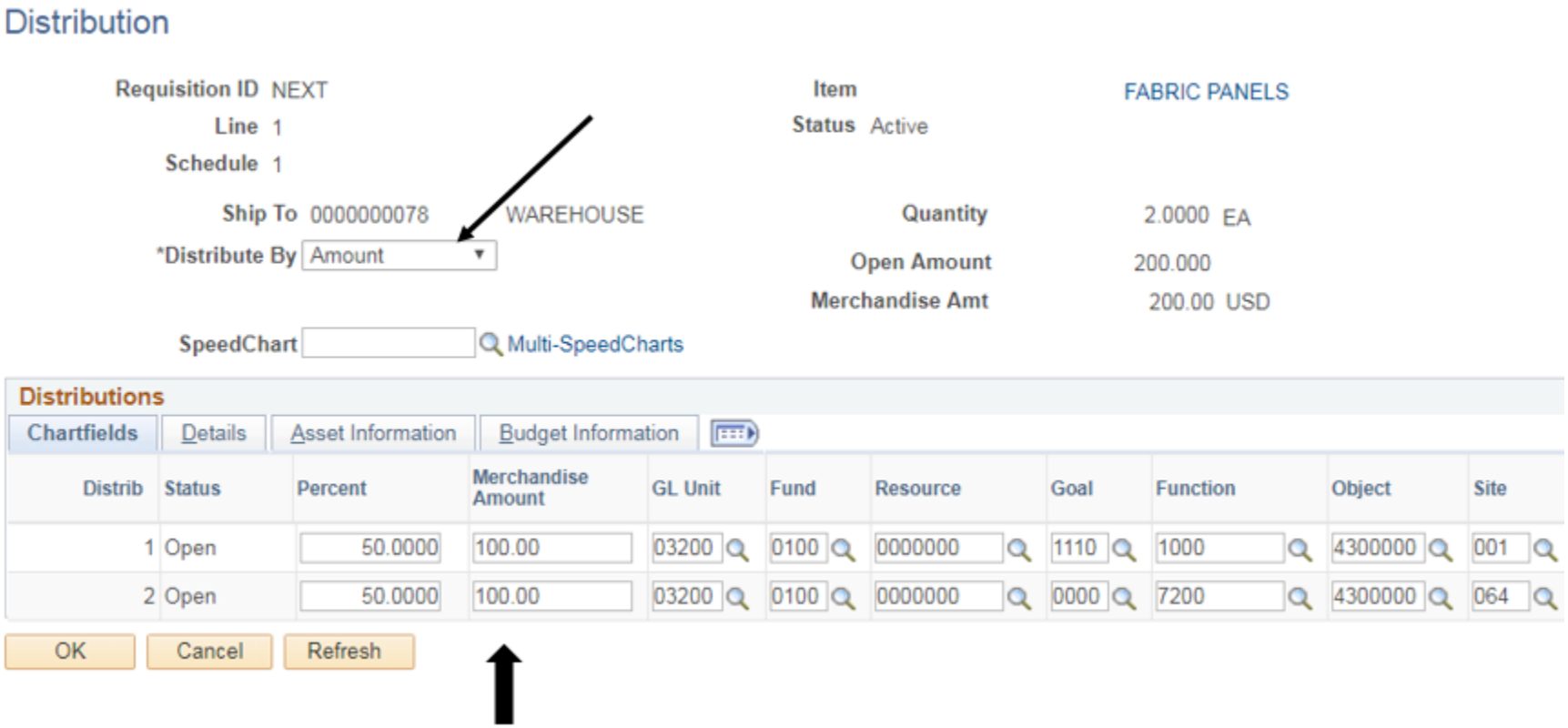


Scroll to the far right of the chart string and click on the (+) icon. Add the number of addition budget lines that you will need to split the budget.

Click OK



Change the *Distribute by drop down from Quantity to Amount. Now you can change the $$$ amounts and split into 2 or more chart strings. Add the other chart strings.



When complete, click OK, then click on “Return to Main Page” to get you back to the main req. page. You can proceed to finalize the requisition by “Saving” it, then “Check Budget”

Maintain Requisitions

Requisition

Business Unit 03200
Requisition ID 0000005325
Requisition Name 0000005325

Status Pending
Budget Status Not Chk'd

☑ **Hold From Further Processing**

Header

***Requester** 135949 Nancy Stasch
***Requisition Date** 07/25/2018 Requester Info
Origin ONL Online Entry
***Currency Code** USD Dollar
Accounting Date 07/25/2018

Requisition Defaults | Add Comments
Requisition Activities
Document Status | Custom Fields

Amount Summary

Total Amount 200.00 USD

Add Items From

Purchasing Kit | Catalog
Item Search | Requester Items

Select Lines To Display

Search for Lines
Line To Retrieve

Line

Personalize | Find | View All |

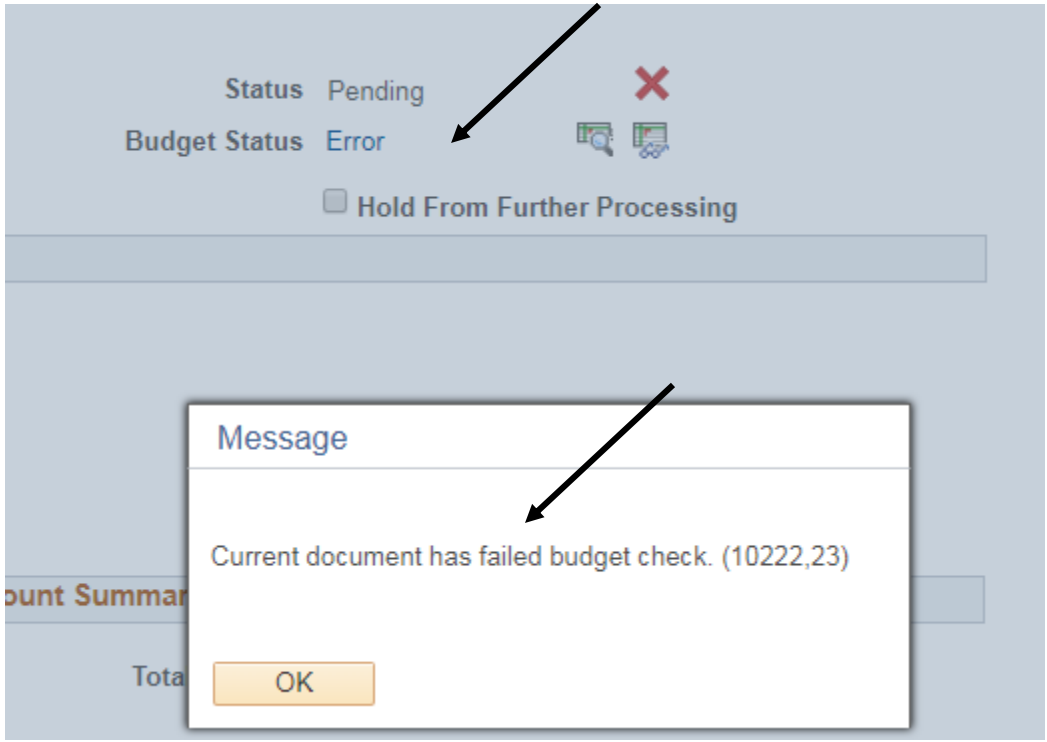
Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		FABRIC PANELS	2.0000	EA	44120000	100.00000	200.00	Pending

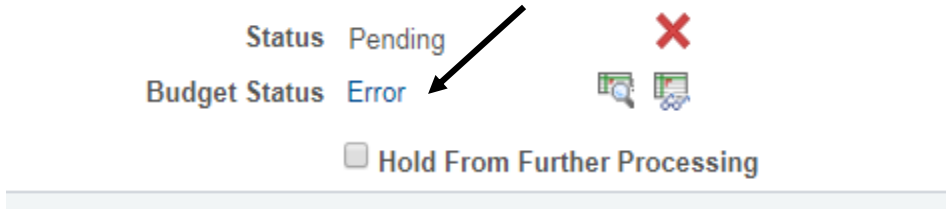
View Printable Version | View Approvals | *Go to ...More...

Save | Return to Search | Notify | Refresh

11. Check the Status AND the Budget Status in the upper right hand corner. You are done if you show "Pending and Valid". However, if you get Pending and "ERROR", this is how you go about figuring out what is wrong.

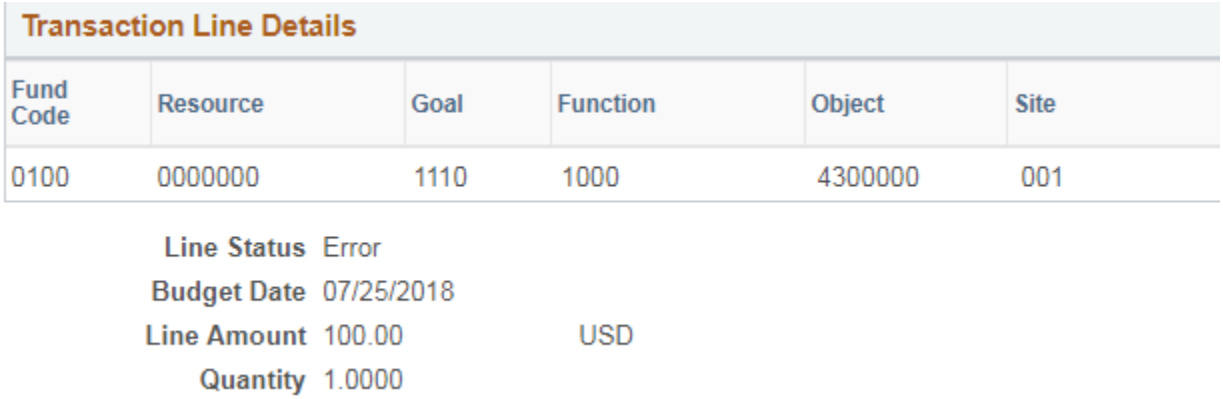


Click on the Blue "Error" word. This will bring up the chart string that is causing the error.

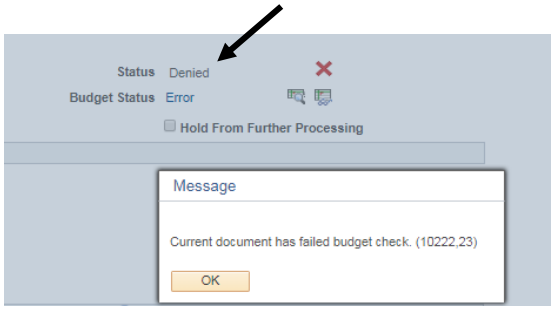


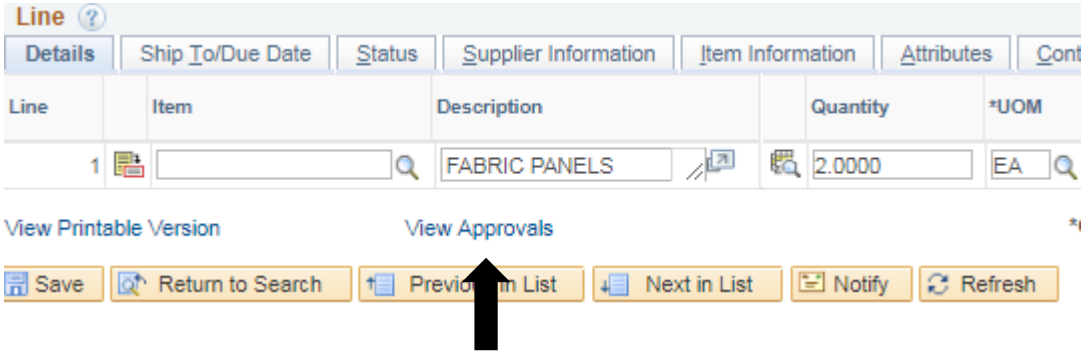
It opens up a new window. Click on the magnifying glass with the + sign located in Details:

This will tell you what chart string is causing the error. Check to see if it was entered incorrectly. If so, you can fix it. It you believe it to be a valid chart string, Call Dianne at X2324 to see if the account code needs to be set up for this fiscal year.

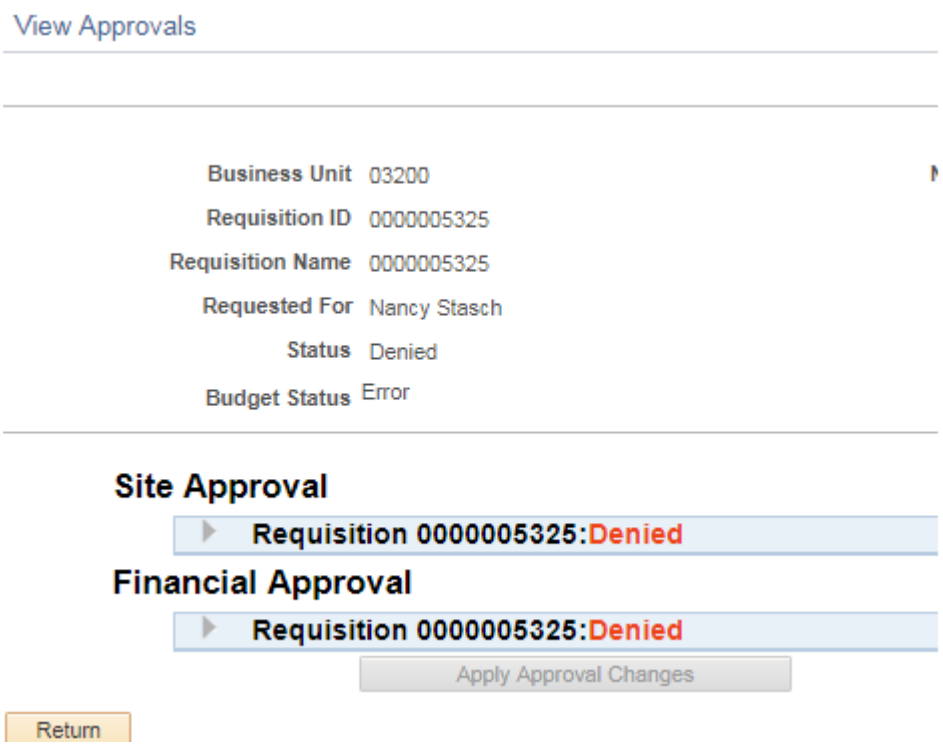


12. When you get a "DENIED" Requisition, see why it was denied by viewing the Approvals.

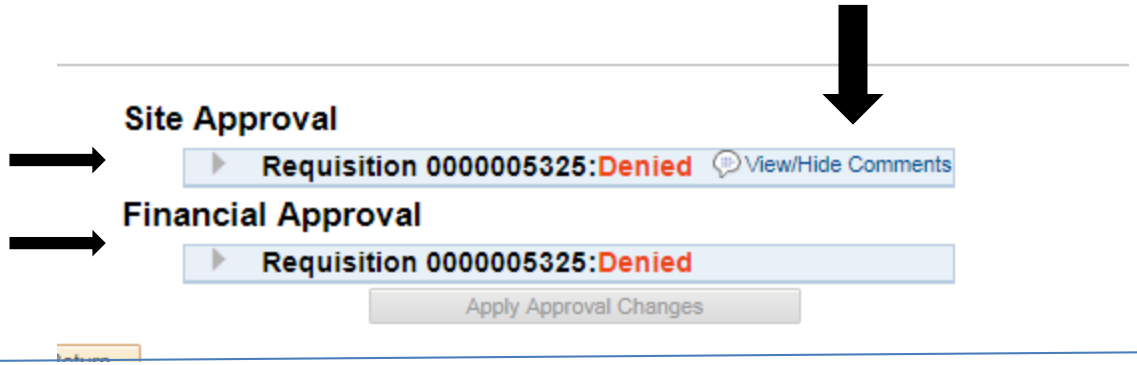




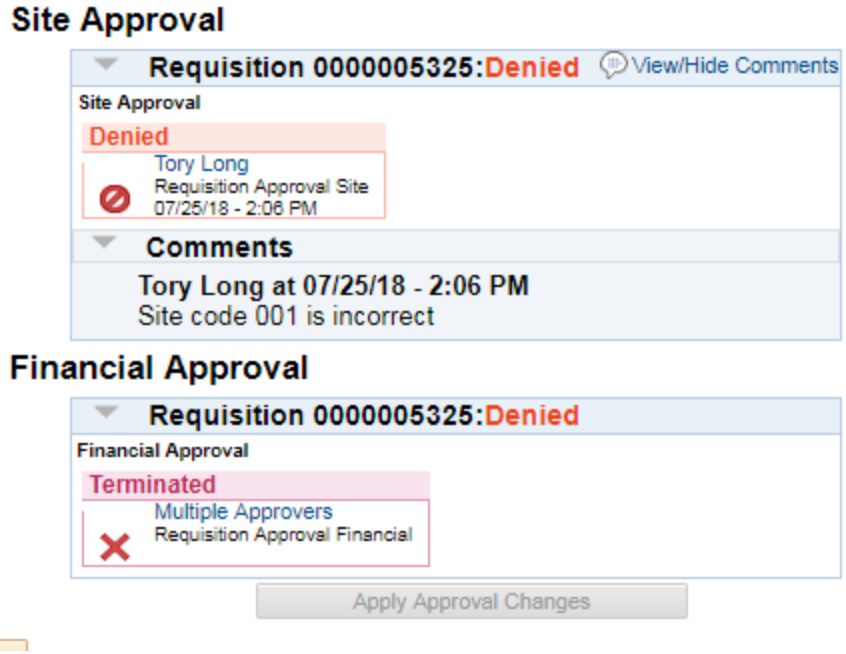
Click on View Approvals. It will open up to the approvals communication page:



Click on the Arrows to open up the communication, then click on View/Hide Comments to see what the reason is:

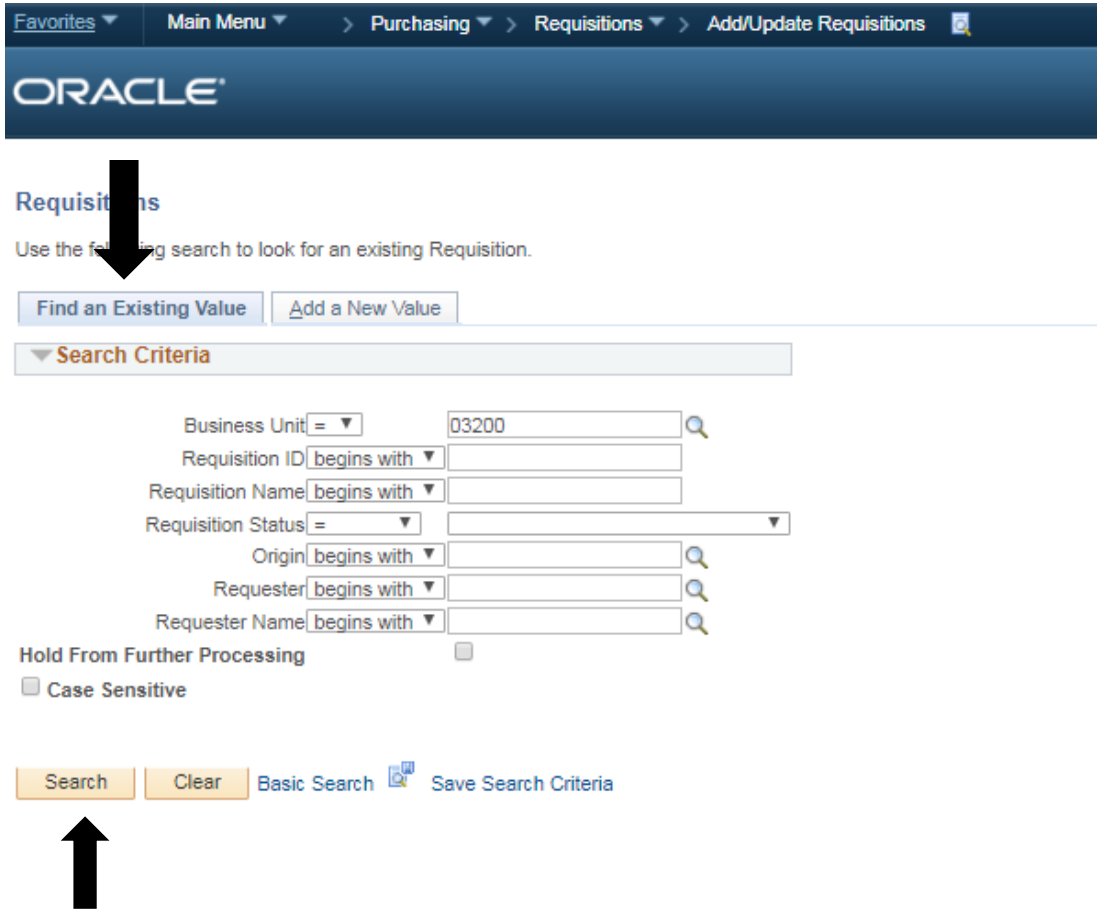


.

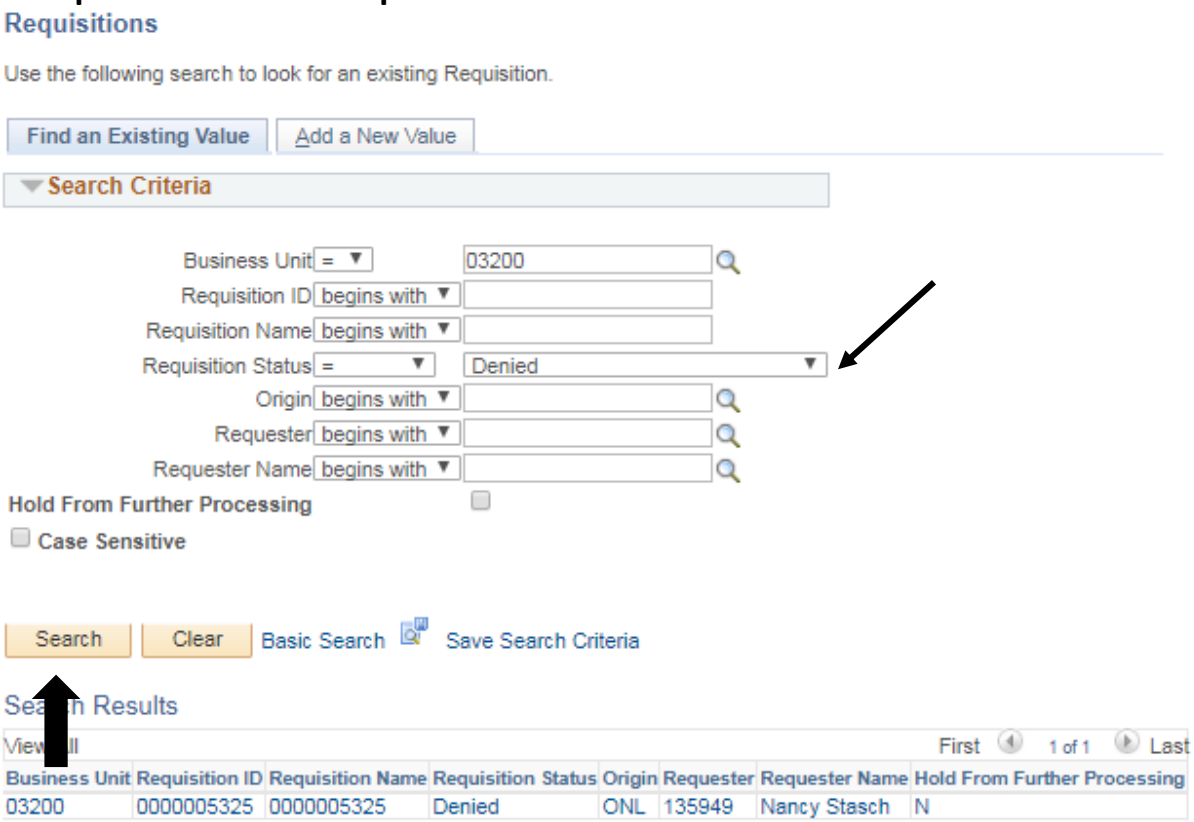
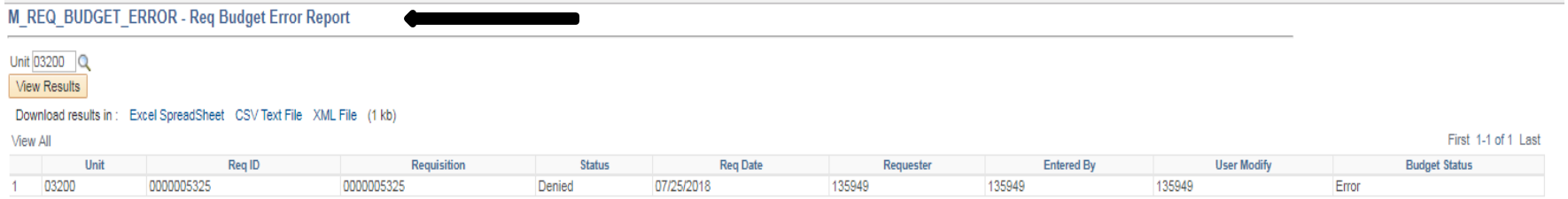


Go back to your Requisition Defaults or to your Schedule/Distribution areas to update the chart string. To get rid of the "Denied" status, you may need to add a comment, or change and quantity (and then change it back again). Then you can save and check budget again and look for pending and valid.

13. You should also check your requisitions status' weekly by looking at the existing requisitions tab. Click on search:



Click on the drop down arrow in requisition status and hit search:



14. You should run a query weekly to check for error status' that you may have missed: