How to Create a Health eShop Requisition

PeopleSoft Financials 9.2 Upgrade
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Health eShop Administrator
Upon logging into PeopleSoft, click on the Navigation/Compass Symbol and then Navigator.

***Note***
You will log into PeopleSoft using your Novell ID and Password. You must have access to PeopleSoft Financials prior to using the system. Access to PeopleSoft requires the completion of a security form. It can be found on the following website: http://www.augusta.edu/finance/peoplesoft/
Click on.....

- eProcurement
- Requisition.
On Requisition Settings, you will complete the following items:

1. Requisition Name
2. Supplier
3. Ship To
4. Due Date
5. Attention
6. Location
7. Account, Fund, Dept., Program, Class, Project
8. Default/Override
In the Line Defaults you will search for the supplier by clicking the magnifying glass. Then, you will type the name of the supplier that you want to buy from in the name section.
For the Shipping Defaults, select a due date and completed the attention to fields. When completing the attention field, you must use the following format: **BUILDING CODE AND ROOM NUMBER/NAME** e.g. PL1001/CAEDWARDS

*** NOTE: The attention to format is mandatory and the system will give an error message if blank or not entered correctly.***
Enter CFC (Account String) in the **Accounting Defaults** section. Confirm accuracy of information, then, click “OK” to move on.
Select the Default Override Options when updating your ship to and location fields to an alternate building and room number (Please click this option after ALL CHANGES have been made)
On this screen, click the “Health eShop” hyperlink
Now you have reached **Health eShop**’s home page. Click on the supplier’s icon that you are wanting to purchase from.
Search for the item(s) you are in need of and add them to your cart. When you are done select checkout.
Select “Submit Order”. On the following screen you can change the cart name and then click “Proceed to Checkout”. 
When finished shopping select “Proceed to Checkout.” On the following screen, review your cart and then select “Return Cart.”
At this point you are back in PeopleSoft, where line items can be edited and/or comments can be entered.

Ensure account codes are correct!!!

Add general comment for the requisition here. Include Specs from the supplier.
Select “Check Budget.” When Valid budget check appears; click “Save and Submit”.
Requisition successfully submitted for the approval process.
How to Create a Special Requisition
In the **Line Defaults** section, search for the supplier by clicking the magnifying glass. Then, type the name of the supplier to buy from in the name section.
Enter CFC (Account String) and in the “Accounting Defaults” section. Confirmed everything is correct, click “OK” to move on.
On this screen, click "Special Request" hyperlink.
On this screen, enter information for a item or service. Enter the description of the item or service, price, quantity, category, unit of measure, and the supplier part or catalog number.

***NOTE: When entering a special item requisition quotes are required from the supplier. The quote will have all detailed information needed to complete this screen. Quotes must be attach to the requisition (shown later in this presentation).
After entering all line items, click the **checkout** button.

***NOTE: When entering a special item requisition, quotes are required from the supplier. The quote will have all of the detailed information you need to fill out this screen. Quotes must be attach to the requisition (shown later in this presentation).***
Click the "Comments" bubble, click "add attachments." Find the saved quote and click upload and "OK."
Check your account code and CFC for accuracy. “Check Budget” then, “Save and Submit”
Manage Requisition
Click on the following:

- Navigation/Compass Symbol
- Navigator
Click on…..

- eProcurement
- Manage Requisitions
Click on…..

- eProcurement
- Manage Requisitions
In this module items are received on orders that are delivered directly to your office or lab. It is recommended that you desktop received your items at least once a week to ensure prompt payment. If items are delivered to different departments, set up a process to receive the packing slips to confirm receipt.
To receive in your order, select the “Action Drop Down”, select “Receive” and click “Go” to proceed.
Check the item(s) that are physically received in the department; select “Receive Selected”.

<table>
<thead>
<tr>
<th>Requisition Lines to Receive</th>
<th>Purchase Order Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU</td>
<td>Requisition</td>
</tr>
<tr>
<td>12000</td>
<td>2017-09-07 ADENT 02</td>
</tr>
</tbody>
</table>
Please ensure that only *physically* received items are received in the system that you have *physically* received.
Receiving confirmation.

Receipt Saved Successfully

You have saved receipt #0000000026 containing the following items:

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Item Description</td>
<td>Received Quantity</td>
<td>Reject Quantity</td>
<td>Accept Quantity</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Staples Perforated Notepad, Wide Ruled, White, 8 1/2&quot; x 11 3/4&quot;, 50 Sheets/Pad, 12/Pk</td>
<td>3.0000</td>
<td></td>
<td>3.0000</td>
<td></td>
</tr>
</tbody>
</table>

Return to Manage Requisitions  Return to Receiving
Print Requisition
Click on the following:

- Navigation/Compass Symbol
- Navigator
Click on.....
- eProcurement
- Manage Requisitions
Select the action drop down and select “View Print” and click “Go”
The requisition report will populate on another tab or window, depending on the internet browser that is used.
Questions?

Contact Candyse Edwards

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