Today’s Agenda

• Why Update the Process

• Editing a Requisition
  1. Before a PO is created
  2. After a PO is created
  3. After PO is dispatched

• Reviewing Change Request Information

• Questions
Why Update the Process

The benefits of using the Change Request feature in PeopleSoft:

- More efficient than sending an email to the Buyer requesting them to manually change the Purchase Order.
- Keeps the Requisition and the Purchase Order in sync, avoiding confusion.
- The Change Request has built in approval: same set of Approval Workflow for changing a requisition as creating a requisition with an increase or decrease in price or quantity.
- Use the Change Request icon to review the changes made to any requisition. It enables you to view the details about each change, the identity of the user who made the change, and when the change was made. One requisition could be changed multiple times and you can view each change.
Editing a Requisition

To make a change go to the Manage Requisition Page:

**Navigation:** Main Menu → eProcurement → Manage Requisitions
Editing a Requisition

The changes are applied as follows:

1. Before a Purchase Order is created.
2. After a Purchase Order is created.
3. After a Purchase Order is dispatched.
Editing a Requisition

1. Before a Purchase Order is created

- To make a change go to the Manage Requisition Page:

  **Navigation:** Main Menu → eProcurement → Manage Requisitions

  ![Requisition Management Screen](image)

**Note:** The Requisition and Approval icons should be the only ones that have color.
Editing a Requisition

Select Edit from the Select Action drop down box and use the Edit Requisition- Review and Submit page to make changes.
Editing a Requisition

- After making the change be sure to Budget Check and Save and Submit.

Notice the Quantity for line 1 is now showing a quantity of 4.

The Pre-Encumbrance Balance has been updated to show the change.
Editing a Requisition

- Review changes on the Manage Requisition page.
Editing a Requisition

2. After a Purchase Order is created.

• To create a Change Request:

**Navigation**: Main Menu → eProcurement → Manage Requisitions

**Note**: The Requisition, Approval and Purchase Order icons should be the only ones that have color.
### Editing a Requisition

#### 3. After a Purchase has been dispatched.

- To create a Change Request:

  **Navigation:** Main Menu → eProcurement → Manage Requisitions

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**Note:** The Requisition, Approval and Purchase Order icons should be the only ones that have color and a status of PO Dispatched or Received, etc.
Reviewing Change Request Information

Using the Change Request Icon.

- To review change request information go to the Manage Requisition Page:

  Navigation: Main Menu → eProcurement → Manage Requisitions
Reviewing Change Request Information

Use the Review Change Requests page to review information regarding changes made.
PeopleSoft Resources

PeopleSoft Chart of Accounts
- PeopleSoft Chart of Accounts
- New Code Structure
- A Quick Reference Guide to Categories

PeopleSoft Workflow
- ePro Requisition Approval Workflow
- Workflow Tip 1
- Workflow Tip 2
- Department Approvers

Payment Request Information
- Payment Request Matrix
- Payment Request Guidelines

eProcurement Information
- Revised Quick Reference for Amount Only vs. Quantity
- Revised Quick Reference for Receiving in PeopleSoft
- Quick Reference for a Change Order
- Requisitioner Hands On Training PPT
- Receiving in PeopleSoft Webinar Recording
- Dell Punchout Webinar PPT
- Chrome Web Browser Update
- Internet Explorer Web Browser Update
- Mozilla Firefox Web Browser Update
Questions…

- If you have questions regarding any specific content from this course or other departmental needs related to eProcurement, Requisitions, Purchase Orders, or Receipts, please e-mail purchasing@sc.edu.

- This presentation is also available to download on OneCarolina’s PeopleSoft Training webpage.

- If you have general questions or concerns about PeopleSoft training, please email them to PSTRAIN@mailbox.sc.edu.
Thank You!