Creating a Requisition using PeopleSoft ePro
End user can create a requisition following the navigation:

Main Menu>eProcurement>Create Requisition
End user can set line defaults that effect various information in the line item, such as category code (commodity code), vendor name, unit of measure, and chart field information. The information set in this area will appear on every line item. See Setting Line Item Defaults “How To” for additional assistance.
Once the requisition name is set, and line defaults are applied (if necessary), end user will be directed to section 2 of the requisition to add items and services. Select the **Special Request Tab** and **Special Item** link to add ad-hoc good or service.
End users are responsible for ensuring information indicated by the asterisk (*) is filled in.
After all information is input, click on the Add Item button to apply this line item to the requisition. Once applied, the system will reset the page, allowing end users to input a new line item. Every line item imputed will clear the page to allow for another, when done line items click on section 3, Review and Submit to review what has been imputed.
In section 3, Review and Submit end users will be required to set a ship to location, due date, and chart fields/budget information.
To add chart field/ budget to each requisition line, end users should use a designated speedchart. End users can manually type it in or use the lookup table to find the appropriate account.

Once the speedchart is input or selected, click on the chartfields2 tab to ensure the appropriate accounting information is correct.
Once the chartfield information is added to all line items, click on the Check Budget button to initiate a system check of fund availability. If there is appropriate funding confirmation will come back valid. If there is an error, end users can interact with the error status to determine what will need to be fixed.

*If end user receives a budget status of ERROR, please click on “Save & preview approvals”, this will allow you to edit the requisition to correct the error.*
Once the requisition is complete, a requisition number will appear, show status as approved, and a budget as valid. The next steps will be system automated, the requisition will be converted to the PO and dispatched.

Again, if end user receives a budget error during the budget check process, please ensure the requisition status says “OPEN” not approved.