PRINTING A REQUISITION

AUTHORIZED REQUESTERS AND AUTHORIZED APPROVERS

CHAPTER 9

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PRINTING A REQUISITION

Overview

There are many ways to print a copy of your purchase requisition.
- Using the View Printable Version hyperlink on many of the pages
- Using the View Printable Version action on the Manage Requisitions page
- Using the Requisition Report hyperlink on the Manage Requisitions page

Objectives

By the end of this chapter, you will be able to:
- Successfully print a purchase requisition.
Viewing a Printable Version while viewing the Requisition

On many of the pages in the requisition process, there are **View Printable Version** hyperlinks. Click on one of these hyperlink and a page pops up in a new window showing the requisition formatted for printing.

Use the Print function from your web browser to print the window.

**Viewing a Printable Version from the Manage Requisitions Page**

Navigate to the Manage Requisitions page.

**Navigation**

- eProcurement
- Manage
- Requisitions

Search for your requisition and once you have found it, selecte View Printable Version in the action drop-down list.

Click **Go**.

A page pops up in a new window showing the requisition formatted for printing.

Use the Print function from your web browser to print the window.

**Running a Requisition Report**

Navigate to the Manage Requisition window as shown above.

Click the **Requisition Report** hyperlink at the bottom of the page.
If you have not already set up a Run Control ID (an identifier used to associate your report parameters to the report you run), click the Add a New Value tab.

If you already have established a Run Control ID, you can enter it, using search functions as needed, in the Run Control ID field on the Find an Existing Value page.

Enter the identifier you want to use when running the report.

For this example, enter `printreq` in the Run Control ID field. Run Control IDs are specific to your User ID.
Click Add.

Navigation
- eProcurement
- Manage
- Requisitions
- Click
  Requisition
  Report
  hyperlink
- Add or enter
  Run Control
  ID

Enter the following parameters to print the requisition:
- Business Unit = BSU
- Requisition ID = your requisition number
- Click Select All in the Statuses to Include box

Use the search options as needed.
Click **Run**.

Be sure that the **Type** is **Web** and the **Format** is **PDF**.

Click **OK**.

The Print Requisitions page returns with a Process Number to use to track the report.

Click the drop-down menu for the Main Menu and navigate to the Report Manager.
Navigation

- Reporting Tools
- Report Manager
- Click the Administration tab

The report should be listed. Verify the process instance number, if needed. Click the name of the report in the Description field.

A new window pops up to display the report in a PDF format.

Navigation

- Reporting Tools
- Report Manager
- Click the Administration tab
- Click the report Description hyperlink

Use the PDF controls to save or print the requisition.
Emailing a Requisition

If you save a PDF copy of the e-mail, you can e-mail it as an attachment through your regular e-mail.

Alternatively, you can print the requisition so that it will be sent to you or another user.

Using the Type field on the Process Scheduler page allows two ways to print a purchase requisition.

Type = Web (PeopleSoft will print to the web)
Type = Email (PeopleSoft will email the requisition to you or someone else)

To print directly to e-mail, follow the steps shown above to navigate to the Process Scheduler Request page for the Print Requisitions process.

- eProcurement
- Manage Requisitions
- Click Requisition Report hyperlink
- Add or enter Run Control ID
- Enter fields
- Click Run

Change the Type to Email and leave the Format as PDF.

Click the Distribution hyperlink.
Use the fields in the *Email Only* section on this page to send the message:

- **Email Web Report**: Check to e-mail the web-based report.
- **Email Subject**: Specify the subject line for your e-mail.
- **Message Text**: Enter any message you want to send with the report.
- **Email Address List**: Enter the e-mail addresses to send to if the users are not users of the PeopleSoft system.
- **Distribute To**: Enter the system User IDs of the persons who are to receive the report. Separate addresses with semicolons.

Click **OK**.

The Process Scheduler Request page is displayed.

Click OK to run the report.

The Print Requisitions page is displayed with the new *Process Instance Number*. 
Go to Outlook and check your inbox.

Open the document and double click on the PDF attachment to display the printed requisition.

It can only be displayed if the computer has Acrobat Reader.