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Procedures for Requisition Approvers

• Do not use the back button to navigate to previous pages. Using the back button may cause you to lose data. Instead use the menu or the Cancel button for navigation.

• Check your Worklist on a daily basis.

• Senior Administrators will serve as Special Category approvers for institutional memberships. Such requisitions will be routed from the requester to the respective College Dean for approval. This approval is not dollar based. Once approved by the Dean, the requisition will be routed for dollar-amount approvals as required.

• When at all possible, recycle rather than deny a requisition. This will save time for the requester.

• If recycling or denying a requisition, make sure to add a comment in the comment field on why the requisition is being recycled or denied. Include any instructions on what the requester should do next. You can also use the comment function to send comments to the next approver if there is one. For example, if the next approver is a Vice President, the Senior Administrator may want to include a comment for that person. You may also receive comments from prior approvers.

• You may reassign your worklist for a period of time (e.g., vacation or sabbatical leave) to another colleague who has the same or higher security access by filling out the BG@100 FMS Alternate Workflow Approver Form which is available at the BG@100 website. Directions for how to submit the form are included on the form.

• If a requisition sits in an approver’s or requester’s worklist for three business days, he or she will receive an e-mail reminding him/her to access the worklist. An email will also be sent to the workflow administration alerting him/her that the requisition has gone for three business days without any action being taken on it.

Following is a sample of this e-mail notification.

To: lbeeman@bgnet.bgsu.edu
Subject: Fwd: FMS Worklist Notification

Date: Thu, 11 Jan 2007 09:51:52 -0500 (EST)
From: pssoft-admin@bgsu.edu
To: aomar@bgsu.edu
Subject: FMS Worklist Notification

Our records indicate that you have worklist transactions that require your attention. Please access your worklist in FMS to complete the approval process.
EXPRESS STEPS: Budget Inquiry

➢ To create a budget inquiry:
  o Commitment Control > Review Budget Activities > Budgets Overview.
  o Click Add a New Value tab.
  o Enter a name for the inquiry and click Add.
  o For the Ledger Group select Appropriation Ledger Group for Department Cost Centers or Projects Ledger Group for Projects/Grants.
  o Enter the Department Cost Center or the Project/Grant.
  o Click Search.
  o Click (Show Budget Details) for Operating.

➢ To view your budget using an inquiry that has been created:
  o Commitment Control > Review Budget Activities > Budgets Overview.
  o Click Find an Existing Value.
  o Enter the name of the inquiry in the Inquiry Name text box.
  o Click Search.
  o Click Search again.
EXPRESS STEPS: Requisition Approval

➢ To Approve a Requisition:
  o Click Worklist.
  o Click the link to the requisition.
  o To see the Vendor or comments from the requester, click the Requisition Details link and the requisition link. A new window opens.
  o To view line comments that were added to the requisition, click . After reading the comments click to return.
  o To see the Ship To address click (Schedule Details) and click the Ship To link.
  o Close the new window that was opened.
  o Add comments if you desire for the next approver to see.
  o Click to approve the requisition.

EXPRESS STEPS: Requisition Recycle

➢ To Recycle a Requisition:
  o Click Worklist.
  o Click the link to the requisition.
  o To see the Vendor or comments from the requester, click Requisition Details and the requisition link. A new window opens.
  o To view line comments that were added to the requisition, click . After reading the comments click to return.
  o To see the Ship To address click (Schedule Details) and click the Ship To link.
  o Close the new window that was opened.
  o Select Recycle from the Approval Action drop-down list.
  o Enter a comment explaining why the requisition was recycled and provide instructions on how to correct it.
  o Click to recycle the requisition.
EXPRESS STEPS: Requisition Denial

- **To Deny a Requisition:**
  - Click **Worklist**.
  - Click the link to the requisition.
  - Select **Deny** from the **Approval Action** drop-down list.
  - Enter a comment explaining why the requisition was denied.
  - Click **Save** to deny the requisition.

EXPRESS STEPS: Requisition Approval Status

- **To check the requisition approval status:**
  - **BGSU Menu > Workflow > Monitor Requisition Worklist**
  - Enter your departmental requester’s name in the **Requester** text box or enter the **Requisition ID** or date ranges.
  - Click **Search**.
  - View the **Worklist** and note the statuses displayed.

EXPRESS STEPS: Requisition Document Status

- **To check the requisition document status:**
  - **Purchasing > Requisitions > Review Requisition Information > Document Status**
  - Enter your departmental requester’s name in the **Requester** text box
  - Click **Search**
  - Click the desired requisition link.
EXPRESS STEPS: Requisition Viewing

➢ To View a Printable Requisition:
   
o Click Worklist.

  o Click the link to the requisition.

    o Click View Printable Req. A PDF (portable document file) of the requisition will display. You may print this if you desire.

  o View the requisition. Click to close the window.

EXPRESS STEPS: Detailed Vendor Viewing

➢ To Verify Vendor Location and Other Vendor Details:
   
o Click the New Window link at the top of the page.

  o From the Menu Pagelet select Vendors > Vendor Information > Add/Update > Vendor.

    o Enter the search criteria and click Search.

  o From the Search Results list, click desired vendor link.

  o Click to close the window.

EXPRESS STEPS: Notification Email

➢ To send a notification Email with a link to the FMS page you are presently viewing. NOTE: Your recipient must have the same or higher level of security to access this page.
   
o From the desired FMS page, click Notify.

  o Enter the To field. If necessary click Lookup Recipient.

  o Enter the CC and BCC fields if desired.

  o Enter the Subject.

  o Select the Priority.

  o Enter the Message and click OK.
EXPRESS STEPS: Creating Reports Listing LOW Requisitions

To create a report that lists requisitions for less than $1500:

- BGSU Menu > Purchasing > Reports > PO Req LT 1500 Report
- Click the Add a New Value tab
- Enter a name for your report request in the Run Control ID text box
- Click Add
- Enter the range of dates you want to view in the From Date and To Date fields
- Enter the Project/Grant number or DCC number
- Click
- Click Run
- From the Process Schedule Request page, click the drop-down arrow for the Server Name field and select PSNT
- Click OK
- Click the Process Monitor link
- Click Refresh until the Run Status is Success and the Distribution Status is Posted
- Click the Details link
- Under Actions, click the View Log/Trace link
- Under File List on the View Log/Trace page, click the link to the PDF file
- If you get a Security Warning box asking if you want to open the site, click Yes
- To print the report, click File, Print
➢ To run a report from a run control you have already created:

- BGSU Menu > Purchasing > Reports > PO Req LT 1500 Report

- Click **Search** at the **Find an Existing Value** tab

- If necessary, click the name of the Run Control Id from the Search Results list

- If necessary, change the date range and/or DCC or Project/Grant number

- Click **Run**

- Click **OK**

- Click the **Process Monitor** link

- Click **Refresh** until the **Run Status** is **Success** and the **Distribution Status** is **Posted**

- Click the **Details** link

- Under **Actions**, click the **View Log/Trace** link

- Under **File List** on the View Log/Trace page, click the link to the PDF file

- If you get a Security Warning box asking if you want to open the site, click **Yes**

- To print the report, click **File, Print**
Signing in to PeopleSoft Financial Management Solutions (FMS)

Use the following steps to sign in to PeopleSoft FMS.

1. Open a Web browser.
2. Enter `fms.bgsu.edu` in the Address text box.

   ![Address Field](https://fms.bgsu.edu)

3. Press the Enter key. 
   The FMS Sign-In page is displayed along with the Universal Resource Locator (URL) address for FMS.

   ![Address Field](https://fms.bgsu.edu)

4. Add this address to your Favorites list by clicking the Favorites icon.

5. Click the Explorer icon in front of the address and drag it to the top of your Favorites list.

6. The Address should now appear in your Favorites list. The next time you need to sign in, just click the Favorites Icon and click the Address from the list.
7. Enter your **BGNet Username** and **Password**.

8. Click **Sign In**.
Viewing Your Budget

Before you can view your budget you must first create a new Budget Overview inquiry.

Use the following steps to create a budget inquiry:

1. Sign in to FMS.
   The Menu Pagelet is displayed at the left of the screen.

2. Click Commitment Control.
   The Commitment Control Navigation Page is displayed.

3. Click Budgets Overview in the Review Budget Activities folder.
   The Budgets Overview search page is displayed. In order to create an inquiry you have to select the Add a new Value tab.

   You can tell if a tab is selected by its color. The active tab is dark blue.
4. Click the **Add a New Value** tab.  
*The Budgets Overview - Add a New Value page is displayed.*

5. Enter a name in the **Inquiry Name** text box. *Please note you cannot have embedded spaces in the name.* If you want your name to be two words, format the name as such:

   Engl_026100  
   This names the inquiry for future use.

6. Click **Add**.  
*The Budget Inquiry Criteria page is displayed.*
7. Enter a description of the Budget Inquiry in the **Description** field box. For example you could enter the Department Cost Center number as the description so that you would know exactly which DCC this inquiry is for.

8. Click ✗️ next to **Ledger Group**. The possible Ledger Groups are displayed.

9. Click **Appropriation Ledger Group**. Please note that this ledger group is for Department Cost Centers only. If you want to view a grant or project budget, you must select **Projects Ledger Group**.

You are returned to the Budget Inquiry Criteria page.

10. To see a bar chart representing the budget, click the **Display Chart** check box. A chart reflecting the budget information will be automatically built.

Right-clicking on the chart enables you to save the chart that is built. Once saved, you can insert the chart into other documents.

**CHARTFIELD CRITERIA**

11. Enter your Department Cost Center number in the DCC text box found in the **ChartField From Value** column. In the example below the DCC for the English Department,
026100, is entered. If you want to view the budgets for a range of Department Cost Centers, you can also enter a DCC in the Chartfield To column, for example 026999.

12. Click Search.

The totals appear on the Budget Overview page.

13. Click (Show Budget Details) for Operating.

The Budget Details page is displayed.
Viewing Your Budget

Once you have added a Budget Overview Inquiry, you can use that inquiry to view your budget.

**Use the following steps to view a budget overview inquiry:**

1. Sign in to FMS.
2. Click **Commitment Control**.
3. Click **Budgets Overview** in the **Review Budget Activities** folder.
4. Click the **Find an Existing Value** tab. *The Budgets Overview – Find an Existing Value page is displayed.*
5. Click **Search**.
   *If you have only created one budget overview inquiry, you will be taken immediately to the Budget Overview page. If there is more than one budget overview inquiry, the Search Results are displayed, as shown below.*

<table>
<thead>
<tr>
<th>Search Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiry Name</td>
</tr>
<tr>
<td>ENGLALL</td>
</tr>
<tr>
<td>ENGLISH</td>
</tr>
<tr>
<td>GRANT1</td>
</tr>
</tbody>
</table>

6. If Search Results are displayed, click the name of the Budget Overview you want to view.
7. To delete a Budget Overview inquiry, click **Trash Can** from the Budget Overview page.
8. Click **Sign Out** to end your session or click **Add** to add another inquiry.

*If you have budgets for Projects or Grants, you should set up Budget Overview Inquiries for those as well.*
Understanding the Requisition Amount Approval Page

Let's first look at the anatomy of a Requisition Amount Approval Page. At the top of the page is general information about the requisition.

**BGSUN will automatically be the default for the Business Unit on all requisitions.**

**Requisition number**

**Name of Requester**

Clicking the Requisition Details link enables you to see greater detail, such as the Vendor name, Ship To location, and comments entered by the requester.

A requisition can be approved, recycled, or denied. Clicking this drop-down box enables you to select the appropriate approval action option.

The options for the Approval Status are In Process and Completed.

Clicking this button builds a PDF file of the requisition which you then can view.

**Comments:** The Comments section is used if you recycle or deny a requisition. In the Comments section you would enter the reason why the requisition was denied. Comments may also be entered by the requester for recycled requisitions. When you receive the corrected requisition back for approval from the requester, any comments that they may have entered in this section will be displayed. You may also see a comment from a prior approver or enter a comment for the next approver.

Clicking this button enables you to spell check whatever you enter in the Comment text box.

**Amounts Details:** The Amounts Details section shows the date the requisition was entered and the total amount.

Clicking this button builds a PDF file of the requisition which you then can view.
Line Details: The Line Details section provides more detail. Here you see a description of the item(s) ordered, the quantity ordered and the item price.

<table>
<thead>
<tr>
<th>Line</th>
<th>Selected</th>
<th>Status</th>
<th>Description</th>
<th>Category ID</th>
<th>Item</th>
<th>Requisition Item Price</th>
<th>Amount</th>
<th>Currency</th>
<th>Name</th>
<th>Base</th>
<th>Requisition ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Active</td>
<td>FSGO-12</td>
<td>00015</td>
<td>EA</td>
<td>200000</td>
<td>799.00</td>
<td>USD</td>
<td>MIRELAN</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Active</td>
<td>FSGO-13</td>
<td>00015</td>
<td>EA</td>
<td>150000</td>
<td>599.25</td>
<td>USD</td>
<td>MIRELAN</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

Distributions/Chartfields: The Distributions/Chartfields section shows you the Fund, Department Cost Center, and Account. The Department Cost Center (DCC) is what used to be the Agency/Org number and designates a department that is based on a fiscal year period. If the requisition is for a Project or a Grant, the Project/Grant chartfield and the Activity Chartfields will be displayed instead of the DCC.

You may also see requisition lines referencing other DCCs or Project/Grants outside of your area of appropriation. In this instance, the costs are being shared with another DCC or Project/Grant. Such requisitions will need to be approved by all the parties involved.

<table>
<thead>
<tr>
<th>Line</th>
<th>Selected</th>
<th>Distribution</th>
<th>Amount</th>
<th>GL Unit</th>
<th>Fund</th>
<th>DCC</th>
<th>Account</th>
<th>Programs</th>
<th>Project/Grant</th>
<th>Activity</th>
<th>Requisition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>1</td>
<td>799.00</td>
<td>BG/SUN</td>
<td>1000</td>
<td>001100</td>
<td>539900</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>1</td>
<td>599.25</td>
<td>BG/SUN</td>
<td>1000</td>
<td>001100</td>
<td>539900</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Processing Buttons: The Processing Buttons enable you to save the approval action, view your entire worklist, view the previous requisition in your worklist, view the next requisition in your worklist and, send an email with a link to the page you are presently viewing. **NOTE:** The recipient of the mail must have the same or higher level of security to access and view the page.
Other Links—In the upper right corner of the page there are a number of other links.

- **New Window** enables you to open a new window in FMS and perform another task. By opening a new window you can perform more than one task at the same time.

- **Help** accesses PeopleSoft FMS help pages.

- **Customize Page** enables you to make changes to some of the page settings such as the order of where the mouse pointer moves when the tab key is pressed.

- **http** copies the URL of the current page to the clipboard.

- **Home** takes you back to the FMS home page.

- **Add to Favorites** enables you to mark a page you use frequently so that you can open that particular page quickly and easily.

- **Sign out** signs you out of the system. Clicking Sign out is the proper way to end your FMS session.
Approving a Requisition

Use the following steps to view and approve a requisition:

1. If necessary, sign in to FMS.

2. Click Worklist.

3. Close the Menu Pagelet by clicking on the Close button in the upper right corner.

4. Your Worklist is displayed. Your worklist should look similar to the one below:

5. Click the blue link for the desired requisition. The Requisition Amount Approval page is displayed.

6. To see more details on this requisition, click the Requisition Details link. A new window is opened.

7. Click the Maximize button to maximize the window.
8. Click the **Requisition** link.
   *Your Requisitions page will be similar to but will not exactly match the data in the following screen captures.*

![Requisition screen capture]

9. Your page should look similar to the one below. You can now see who the Vendor is.

![Vendor details]

10. Click the **Shipment Details** button at the end of the line.

11. The **Shipment Details** page is displayed. Click the **Ship To** link to see the Ship To address.

![Schedule details]

12. Click **OK**.
   *The Shipment Details page returns.*

13. Click **Return**.
   *The Line Details page returns.*

14. The line **Details** page is displayed. If the requester has entered comments, the comments icon at the end of the line will include lines. Click this icon to see the comments.

15. After reading the comments, click **OK**. The Line Details page returns.

16. Click **Return**.
   *You are back to the Requisitions page.*
17. Close the window by clicking the close button in the upper right corner of the window. You are now at the Requisition Amount Approval page that you first accessed from your Worklist. Do not close the window using the Sign Out link. This will exit you out of the FMS session.

18. To approve this requisition, click . Please note that the default Approval Action is Approve. Don’t mistakenly approve a requisition that you want to recycle or deny.

19. Note the Approval Status. It will either be Complete or In Process, depending on the circumstances. If you are the final approver for this requisition, the Approval Status will be Complete. If you are not the final approver for this requisition, the Approval status will be In Process.

Regardless of the status, the link for this requisition ID will disappear from your worklist.

20. You can now either click or you can click Sign Off to sign off of the system.

When a requisition has been approved by all required approvers, an e-mail will be sent to the requester stating the requisition number that was approved. Following is a sample of this e-mail notification.

```
Date: 15-Nov-2006 14:26:43 -0500
From: <pssoft-admin@bgsu.edu>
To: <bg100test3@bgsu.edu>
Subject: Amount Requisition Approved

Requisition 0000001036 entered on 2006-11-14 has been approved.
```
Recycling a Requisition

Use the following steps to view and recycle a requisition:

1. If necessary, sign in to FMS and click **Worklist**.

2. Close the **Menu Pagelet** by clicking on the **Close** button in the upper right corner.

3. Your **Worklist** is displayed. Your worklist should look similar to the one below:

   ![Worklist Example](image)

4. Click the blue link for the desired requisition.
   
   *The **Requisition Amount Approval** page is displayed.*

5. To see more details on this requisition, click **Requisition Details**.
   
   *A new window is opened.*

6. Click the Maximize button to maximize the window.
7. Click the Requisition link [Requisition 000000935].
   The Line Details page is displayed. You can now see who the Vendor is. Note if the comments icon include lines. Click the icon to view the comments. If you want to view the Ship To location, click the icon to access the Shipment Details page and then click the Ship to link.

8. To return to the Requisition Amount Approval page, click the OK button, the Return Button, and the Return button. Close the window by clicking the close button in the upper right corner of the window.

9. You should be back to the window with the Requisition Amount Approval page. Click the Approval Action drop-down box and select Recycle.

   Please note that the default Approval Action is Approve. Don’t mistakenly approve a requisition that you want to recycle or deny.

10. When you recycle a requisition you need to add a comment letting the requester know why it is being recycled. This comment will appear in the e-mail notification that is automatically sent to the requester. This message will also appear on the Requisition Amount Approval page that is sent back to the Requester's worklist. Enter an appropriate comment in the Comment text box:

11. You are ready to recycle the requisition. Click Save. Note the Approval Status. It will be In Process.

12. You can now either click or you can click Sign Off to sign off of the system.

When a requisition is recycled, an e-mail will be sent to the requester stating the requisition number that has been recycled. The comment you entered in the Comment text box is included in the e-mail. Following is a sample of this e-mail notification.

Date: 17-Nov-2006 10:14:03 -0800
From: <soft-admin@bgsu.edu>
To: <BS100TEST1@bgsu.edu>
Subject: Requisition 0000000028 has been Recycled.

Your Requisition 000000028 has been recycled by the designated approver (BGSU). Please check your worklist inbox. cast 0wens/ a/b 5224
Denying a Requisition

Use the following steps to view and deny a requisition:

1. If necessary, sign in to FMS and click Worklist.

2. Close the Menu Pagelet by clicking on the Close button in the upper right corner of the Menu Pagelet.

3. Your Worklist is displayed. Your worklist should look similar to the one below:

4. Click the blue link for the desired requisition. The Requisition Amount Approval page is displayed.

5. Click the Approval Action drop-down box and select Deny.

   Please note that the default Approval Action is Approve. Don’t mistakenly approve a requisition that you want to recycle or deny.

6. When you deny a requisition you need to add a comment letting the requester know why it is being denied. This comment will appear in the e-mail notification that is automatically sent to the requester. Enter an appropriate comment in the Comments text box:

7. You are ready to deny the requisition. Click Save.

8. You can now either click View Worklist or you click Sign Off to sign off of the system.
Viewing a Printable Requisition

Use the following steps to view a printable requisition:

1. If necessary, sign in to FMS and click Worklist.
2. Close the Menu Pagelet by clicking on the Close button in the upper right corner of the Menu Pagelet.
3. Your Worklist is displayed.
4. Click the blue link to desired requisition. The Requisition Amount Approval page is displayed.
5. Click View Printable Req.
6. The requisition is displayed in a new window. After you have viewed the requisition click to close the window.
7. You can now either click View Worklist or you click Sign Off to sign off of the system.
Viewing Detailed Vendor Information

Use the following steps to view detailed vendor information:

1. If necessary, sign in to FMS. You need to access the **Menu Pagelet**.

2. From the **Menu Pagelet**, click **Vendors, Vendor Information, Add/Update, and Vendor**.
   The Vendor Information Search page is displayed.

3. Click the **Name 1** drop down box and select **contains**.

4. Enter the text for your search criteria in the **Name 1** text box.

5. Click **Search**.
   The search results are displayed.

6. Click the desired vendor name.
   The summary information for that vendor is displayed. In this example, you can see the Order and Remit To addresses are different.

7. Click the **Address** tab for further information about the vendor address.

8. Click the **Contacts** tab for further information about the sales representative.

9. Click the **Location** tab for information on how you conduct business with this vendor.
10. Click **Payables**.
   The Payables Options page is displayed.

11. To see all the Payables options click **Expand All**.
   Scroll down the screen to look at all the payables options.

12. Click **OK**.

13. Click **Procurement**.
   The Procurement Options page is displayed.

   When you are working in a new window be sure to close it using the close button in the upper right corner of the window. If you close the window by clicking Sign Out, you will sign yourself out of the system.

14. Click **OK**.
Checking the Requisition Approval Status

The Monitor Worklist will allow you to track the approval status of a requisition, from the requester to all approvers (Special Category Approvers, Grants/Project Approvers, Budget Administrator, Senior Administrator, Vice-President, and President). Additionally, the monitor displays one of three statuses: Available (requisition is available to be selected by an approver but it has not yet been selected), Selected (requisition has been selected by an approver but no action has been taken on it), and Worked (approver has selected an Approval Action and has saved the Requisition Approval Page).

**Use the following steps to check requisition approval status:**

1. If necessary, sign in to FMS.

2. From the **Menu Pagelet** click **BGSU Menu, Workflow, Monitor Requisition Worklist**.

3. The **Search Worklist** page is displayed. Enter the desired search criteria and click **Search**. For example, you may want to see the approval status for the requisition enter by your departmental **Requester**.
4. The **Worklist** is displayed. Note the following columns: Requisition ID, Requisition Status, Date, Worklist Name, Requester (username), Approver (username of approver), Worklist Instance Status, Instance Worked/Date/Time, and Instance Available Date/Time.

    In the following example, the requisition is *available* for the approver to select. The requisition is in the approver’s worklist but no action has been taken on it.

<table>
<thead>
<tr>
<th>Worklist</th>
<th>Requisition ID</th>
<th>Requisition Status</th>
<th>Date</th>
<th>Work List Name</th>
<th>Requester</th>
<th>Approver</th>
<th>Worklist Instance Status</th>
<th>Instance Worked Date/Time</th>
<th>Instance Available Date/Time</th>
<th>Transaction ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>0000002704</td>
<td>Pending</td>
<td>04/05/2007</td>
<td>Req Approval Worklist</td>
<td>APPWEIBT</td>
<td>bgschled</td>
<td>Mic3Food</td>
<td>04/05/07 5:15:53PM</td>
<td>Available</td>
<td>2200</td>
</tr>
</tbody>
</table>

5. In the following example, the requisition has been *selected* by the approver but he or she has yet to select an approval action. The approver is reviewing the requisition details.

<table>
<thead>
<tr>
<th>Worklist</th>
<th>Requisition ID</th>
<th>Requisition Status</th>
<th>Date</th>
<th>Work List Name</th>
<th>Requester</th>
<th>Approver</th>
<th>Worklist Instance Status</th>
<th>Instance Worked Date/Time</th>
<th>Instance Available Date/Time</th>
<th>Transaction ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>0000001056</td>
<td>Pending</td>
<td>03/14/2007</td>
<td>Approva Ch/Flds Worklist</td>
<td>ALLENDA</td>
<td>WMANNN</td>
<td>JMBLIG</td>
<td>04/09/07 9:53:56AM</td>
<td>Selected</td>
<td>715</td>
</tr>
</tbody>
</table>

6. In the last example, the requisition has been *worked* by the approver. The approver has selected an approval action and has saved the **Requisition Amount Approval** page.

<table>
<thead>
<tr>
<th>Worklist</th>
<th>Requisition ID</th>
<th>Requisition Status</th>
<th>Date</th>
<th>Work List Name</th>
<th>Requester</th>
<th>Approver</th>
<th>Worklist Instance Status</th>
<th>Instance Worked Date/Time</th>
<th>Instance Available Date/Time</th>
<th>Transaction ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>00000002670</td>
<td>Pending</td>
<td>04/05/2007</td>
<td>Approve Ch/Flds Worklist</td>
<td>ALLENDA</td>
<td>bgschled</td>
<td>WMANNN</td>
<td>04/05/07 9:54:29</td>
<td>000000AM</td>
<td>04/09/07 8:02:31AM</td>
</tr>
</tbody>
</table>
Checking the Requisition Document Status

Requisition Document Status inquiry will give you the ability to track and review requisitions through the purchasing and payment cycle.

Use the following steps to check the requisition document status:

1. If necessary, sign in to FMS.

2. From the Menu Pagelet click Purchasing, Requisitions, Review Requisition Information and Document Status.

   The Requisition Document Status page is displayed. There are a number of ways you can search for a requisition. You can search using the Requisition ID number, Requisition Status, Requisition Date, Origin, Requester Username, or the Description.

   Requisition Document Status
   Enter any information you have and click Search. Leave fields blank for a list of all values.

   Business Unit: = BGSUN
   Requisition ID: begins with
   Requisition Status: =
   Requisition Date: =
   Origin: begins with
   Requester: begins with
   Description: begins with
   □ Case Sensitive
   Search Clear Basic Search Save Search Criteria

3. If necessary, enter BGSUN as the Business Unit.

4. Click for Requester.

5. Search for the username of the desired departmental requester. Click the Requester username.

6. Click Search.

   A list of the requisitions entered the Requester’s username is displayed.
7. Click the desired **Requisition ID** link.

Your page will look similar to the following. You are able to see the **Requisition ID**, **Status** and **Budget Status**. Under **Associated Documents** you can view the other documents connected to this requisition. In the example below you can see that a purchase order was created, the item was received, a voucher was posted and a check was posted.

8. Click **Return to Search** to check the status of another requisition.
Creating Reports Listing LOW Requisitions

Use the following steps to create a report that lists all LOW Requisitions:

Requesters are approvers for any requisition they enter that is under $1500. These requisitions go straight to Purchasing to be sourced to a purchase order without coming first to the Budget Administrator for approval. Therefore, Budget Administrators should regularly run the report that lists all requisitions under $1500 to keep track of what purchases are being made that are under $1500. The following directions take you step-by-step through the process for creating this report.

21. Sign in to FMS and navigate to BGSU Menu, Purchasing, Reports, PO Reg LT 1500 Report

22. The PO Req LT 1500 Report page is displayed. Click the Add a New Value tab.

23. Enter a name for your report request in the Run Control ID text box. There cannot be any embedded spaces in the name. Click Add.

24. Enter the range of dates you want to view in the From Date and To Date fields.

25. Enter the Project/Grant number or DCC number for the requisitions you want to view.
26. Click **Save** to save your report request. The next time you want to view the requisitions under $1500 you will not have to recreate your request.

27. Click **Run**.

28. The Process Schedule Request page opens. Click the drop-down arrow for the Server Name field and select **PSNT**. Click **OK**.

29. Click the **Process Monitor** link.

30. Click **Refresh** until the Run Status is **Success** and the Distribution Status is **Posted**.

31. Click the **Details** link at the end of the line.
32. Under **Actions**, click the **View Log/Trace** link.

33. Under **File List** on the View Log/Trace page, click the link to the PDF file.

34. If you get a Security Warning box asking if you want to open the site, click **Yes**.

35. The Report is displayed. At this point you can view it online or go to **File** and **Print** to print it.
Once you have run your report, another way you can access it is from the Menu Pagelet by navigating to Reporting Tools and Report Manager.

The default setting is for only the reports created in the past day to be displayed. If you want to view a report you created on a previous day you need to enter the number of days you want to display and click Refresh. Reports are available for up to 75 days.

Click the link to the report. Click Yes if you get security warnings. Under File List, click the link to the PDF file. If you get a Security Warning box asking if you want to open the site, click Yes. The Report is displayed. At this point you can view it online or go to File and Print to print it.

36. When you have finished with the report click X to close the window. This report will remain in your Report Mgr for 75 days.

37. If you want to run the report you created for a new time frame or different DCC or Project/Grant, click BGSU Menu, Purchasing, Reports, PO Reg LT 1500 Report.

38. The Find an Existing Value tab should be selected. Click Search.

39. If you have only created one Run Control ID you will be taken directly to the PO Req LT 1500 Rpt page. If you have created more than one Run Control ID, click the Run Control ID for the Under $1500 Report from the list that is displayed.

40. If necessary, change the date range and/or the DCC or Project/Grant number for the requisitions you want to view.

41. Click Run.
42. Click OK.

43. Click the Process Monitor link.

44. Click Refresh until the Run Status is Success and the Distribution Status is Posted.

45. From the Menu Pagelet, click the Details link at the end of the line.

46. Follow steps 12 through 16 to display the report.
Keyboard Shortcuts

People Soft includes keyboard shortcuts that can be used as alternatives to using the mouse. There are two categories of these keyboard shortcuts: hot keys and access keys. A printable list of these shortcuts is available while online by pressing Ctrl+K while on a search or transaction page.

Hot Keys

When any one of the following hot key combinations is pressed the corresponding action occurs. Several of the hot key combinations perform different actions depending on the currently active page. The following table outlines the shortcuts that you can use in place of clicking the equivalent action button.

<table>
<thead>
<tr>
<th>Hot Keys</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALT + 1</td>
<td>Save a page in a transaction. Moves to the Search or Add button on a search or look up page. Moves to the OK button on a secondary page.</td>
</tr>
<tr>
<td>ALT+2</td>
<td>Returns to the search page from the transaction page.</td>
</tr>
<tr>
<td>ALT+3</td>
<td>View the next row in the list when the button is active.</td>
</tr>
<tr>
<td>ALT+4</td>
<td>View the previous row in the list when the button is active.</td>
</tr>
<tr>
<td>ALT+5</td>
<td>Accesses the Look Up page in place of the magnifying glass or calendar prompt. Opens the Calendar Prompt.</td>
</tr>
<tr>
<td>ALT+6</td>
<td>Opens the pop-up window on a page.</td>
</tr>
<tr>
<td>ALT+7</td>
<td>Inserts a row in a grid in place of the plus sign or scroll area.</td>
</tr>
<tr>
<td>ALT+8</td>
<td>Deletes a row in a grid in place of the minus sign or scroll area.</td>
</tr>
<tr>
<td>ALT+9</td>
<td>Accesses the Help line.</td>
</tr>
<tr>
<td>ALT+0</td>
<td>When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.</td>
</tr>
<tr>
<td>ALT+.</td>
<td>View the next set of rows in a grid or scroll area.</td>
</tr>
<tr>
<td>ALT+,</td>
<td>View a previous set of rows in a grid or scroll area.</td>
</tr>
<tr>
<td>ALT+/</td>
<td>Finds data in a grid or scroll area.</td>
</tr>
<tr>
<td>Alt+'</td>
<td>Views all rows of data in a grid, scroll area, or search page results list.</td>
</tr>
<tr>
<td>Alt+\</td>
<td>Toggles between Add a New Value and Find an Existing Value on a search page.</td>
</tr>
<tr>
<td>CTRL+J</td>
<td>Displays the system information page.</td>
</tr>
</tbody>
</table>
Keyboard Shortcuts

CTRL+K  When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.

CTRL+Y  Toggles the Menu Pagelet between collapse and expand.

CTRL+Z  Accesses the menu search box.

CTRL+TAB  Toggles the focus through the frame set.

ENTER  Activates the OK button, where appropriate. On a search page, activates the Search button. On a Look Up page, activates the Lookup button.

ESC  Activates the Cancel button, where appropriate.

Access Keys

Access keys can be used for page tabs to help you move between pages in a component. Access keys are identified by the underlined letter in the page tab name. To access a page, press ALT plus the underlined letter, and then press ENTER.