Track & Manage Your ePro Orders
Monitor Your Requisitions; Be Sure You Get Your Orders

You are expected to monitor and track your own eProcurement requisitions, to ensure you receive your items on time. Only by tracking your orders can you resolve delays, or otherwise troubleshoot potential problems.

This Job Aid shows you how to track your requisitions; and it also shows you how you can edit them, when possible. Editing includes changing an order, canceling an order, and re-opening and/or resubmitting an order.

Important Note: Do not contact the Purchasing (Strategic Sourcing) Department just to ask the status of an order. Only contact them to ask about an order if it is late in coming; that is, at least 30 days have passed since the Purchase Order was created, and you haven’t received the items yet.

There is a screen in the eProcurement software called the Manage Requisitions page:

- View all your requisitions past and present, including each one’s current status.
- View who has approved a requisition, and when it was approved.

1. After you log into our PeopleSoft Financial online software, click:

Main Menu —> eProcurement —> Manage Requisitions
2. The **Manage Requisitions** page opens up, automatically displaying all the orders you’ve created within the last seven days. Here’s what you can do to update and filter which requisitions display on this page:

   A. Change the **From** and **To** dates to view requisition orders that were created within a particular day, date frame of several days, weeks, or months, at any time in the past.

   B. Filter the display of requisition orders by either the **Request Status** (Open, Pending, Approved, etc.) or the **Budget Status** (Valid, Error, Not Checked), or both those filters together.

   C. Whatever filters you choose, be sure to then click **Search** in order for the screen to display results of your filter parameters.

   D. Your requisition orders will display at the bottom of your screen, with the most recent ones at the top of the list, and the oldest ones at the bottom.
3. Roughly in the center of the Manage Requisitions page, look for the Request State column. It will tell you the current status of your requisitions.

Request State Definitions:

- **Approved**: Entire Requisition has been approved for processing.
- **Canceled**: Requisition has been canceled; it remains frozen until you choose to reinstate it.
- **Completed**: Requisition has completed all its steps. Does not necessarily mean your entire order is received yet.
- **Denied**: Entire Requisition has been denied.
- **Open**: Requisition has been created & saved, but not submitted.
- **P.O. Partially Canceled**: Purchase Order (created off the Requisition) has been partially canceled.
- **P.O. Partially Completed**: Purchase Order (created off the Requisition) has been partially completed.
- **P.O. Partially Created**: Purchase Order (created off the Requisition) has been partially created.
- **P.O. Canceled**: Purchase Order (created off the Requisition) has been entirely canceled.
- **P.O. Completed**: Purchase Order (created off the Requisition) has been entirely completed.
- **P.O. Created**: Requisition has generated a Purchase Order.
- **P.O. Dispatched**: Purchase Order (created off the Requisition) has been sent to a supplier for fulfillment.
- **Partially Dispatched**: Part of your order is on its way to you from our Supply Center.
- **Partially Received**: Part of your order has been received at our Supply Center.
- **Pending**: Requisition has been created, saved, and submitted.
- **Received**: Your entire order has been received at our Supply Center.
- **See Lines**: One or more items were denied, while the rest of the items were approved.
4. In the list, after you locate the requisition you want to track, you need to click its **Expand Section** button to reveal that requisition’s timeline. The Expand Section button looks like a tiny gray triangle on the far left side.

<table>
<thead>
<tr>
<th>Requisition ID</th>
<th>Description</th>
<th>Vendor Code</th>
<th>Received Date</th>
<th>Status</th>
<th>validity</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000237114</td>
<td>MICR Verified Quote</td>
<td>SDUSD</td>
<td>07/26/2013</td>
<td>Received</td>
<td>Valid</td>
</tr>
<tr>
<td>0000237097</td>
<td>SES Renewal</td>
<td>SDUSD</td>
<td>07/26/2013</td>
<td>Partially Received</td>
<td>Valid</td>
</tr>
<tr>
<td>0000036593</td>
<td>Oracle Contract # 5593454</td>
<td>SDUSD</td>
<td>07/18/2013</td>
<td>Partially Received</td>
<td>Valid</td>
</tr>
<tr>
<td>0000036301</td>
<td>Scale Matrix Year 2</td>
<td>SDUSD</td>
<td>07/15/2013</td>
<td>Received</td>
<td>Valid</td>
</tr>
<tr>
<td>0000236074</td>
<td>Logical Choice Term PO ...</td>
<td>SDUSD</td>
<td>07/10/2013</td>
<td>PO(s) Dispatched</td>
<td>Valid</td>
</tr>
</tbody>
</table>

5. The requisition’s lifespan/timeline is displayed, as well as details about the items ordered *(below the timeline)*. Going from left to right, each icon represents a step in the requisition’s progress. If the icon is lit up and brightly colored, then that step is either in process, or has been completed.
Request Lifespan (Timeline) Icon Definitions:

- **Requisition**: Details about the Requisition *(information about what is being ordered)*
- **Approvals**: Shows any/all district staff who will approve *(or has already approved)* the Req.
- **Inventory**: This icon lights up if a stock/inventory item is being ordered
- **Purchase Order**: Indicates status of Purchase Order
- **Change Request**: Lights up if you ask our Buyers to make a change on the Req
- **Receiving**: Indicates receipts of items already received at our Supply Center
- **Returns**: RTV processes are being followed; if you want to return an item, contact Purchasing *(Strategic Sourcing)* Dept. and ask them what to do.
- **Invoice**: Indicates Purchase Order lines, including voucher and receiver
- **Payment**: Displays payment inquiry and results

Click the tiny gray triangle button again to collapse the Lifespan/Timeline:

6. The **Select Action** drop-down menu on the far right side of the Manage Requisitions page is used to do things or observe things about a given requisition. The choices you see displayed in this menu will change depending on the current status of the requisition. For example, the **Cancel** choice vanishes once the requisition has generated a Purchase Order, but a new choice might then appear, such as **Process Return**.

After clicking the action you want, be sure to click the yellow **Go** button to make it happen.
7. In the example shown below, we clicked View Approvals from the Select Action menu. The Approval Status page is displayed. Here, you can see when the requisition was either denied or approved, who did it, and when they did it.

![Approval Status page]

Be sure to scroll all the way down the page. More information is usually to be seen.

To display a printable version of the requisition, which includes all the details of the order, click here.

The next page of this Job Aid shows examples of several of the more commonly used features of the Select Action menu choices.

Please be sure to read all the way to the last page of this Job Aid, to see some very important information you need to know.
**CANCEL:** To cancel a requisition, click **Cancel**, then click **Go**. On the next screen you see, click the **Cancel Requisition** button. **NOTE:** If you don’t see **Cancel** on the Select Action menu, that means it is too late to cancel it.

**COPY:** To create and use a copy of a requisition, click **Copy**, then click **Go**. The next thing you see will be an exact replica of the requisition. You can then edit it, and/or submit it as a new order.

**EDIT:** To edit a requisition, click **Edit**, then click **Go**. If the requisition is waiting to be approved, you’ll see the **Message** pictured below. To go on and edit the req, you would click **OK**; to cancel the editing choice, you would click **Cancel**. **NOTE:** If you don’t see **Edit** on the Select Action menu, that means it is too late to edit it.

---

**Message**

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

[OK] [Cancel]
Important! What to Do if This Happens to You

- **Requisition Denied for Lack of Information.**
  
  - Edit the requisition. Provide the missing information they asked for. Budget-check, and resubmit.

- **Items Not Received Within 30 Days of P. O. (only non-Catalog orders).**
  
  - Watch for your orders to arrive. If you still haven’t received the items by 30 days after the date of the Purchase Order, contact the current eProcurement SME (Subject Matter Expert), and tell her right away. This helps resolve the delay, close out the Purchase Order, and save your site’s money. Currently, the SME is Robin Hoffpauir, (858) 522-5805, rhoffpauir@sandi.net

  **How to find a requisition’s P.O. from the Manage Requisitions screen:**

  1. Expand requisition’s Lifespan/Timeline
  2. Click to see P.O. Number & Date

- **Special Request Items? Do This.**
  
  - Whenever you receive any Special Request items you ordered, as soon as you get them, immediately send an email message to the Supply Center to let them know. **Include the P.O. number.** Send this message:

    “P.O. #_____ We’ve received everything.”

    Send the email to: supctrec@sandi.net

- **Want to Return Something? Do This.**
  
  - Web items (Office Depot, Waxie, etc.): You can return those yourself.
  
  - Any Other Items: Do not return them yourself. Contact Strategic Sourcing Dept. (858) 522-5808