ORACLE
PEOPLESOFT ENTERPRISE

Electronic Requisitioning: A User Guide

Oracle/PeopleSoft Version

Finance Division

Tufts University

Implemented 2013

Updated February 11, 2021

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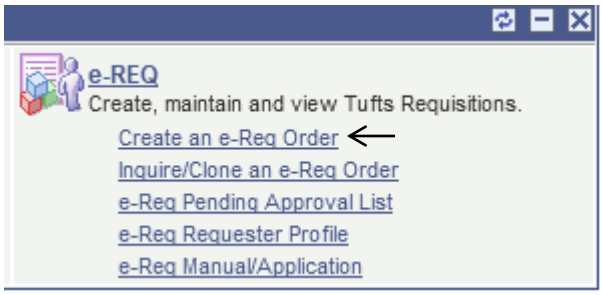
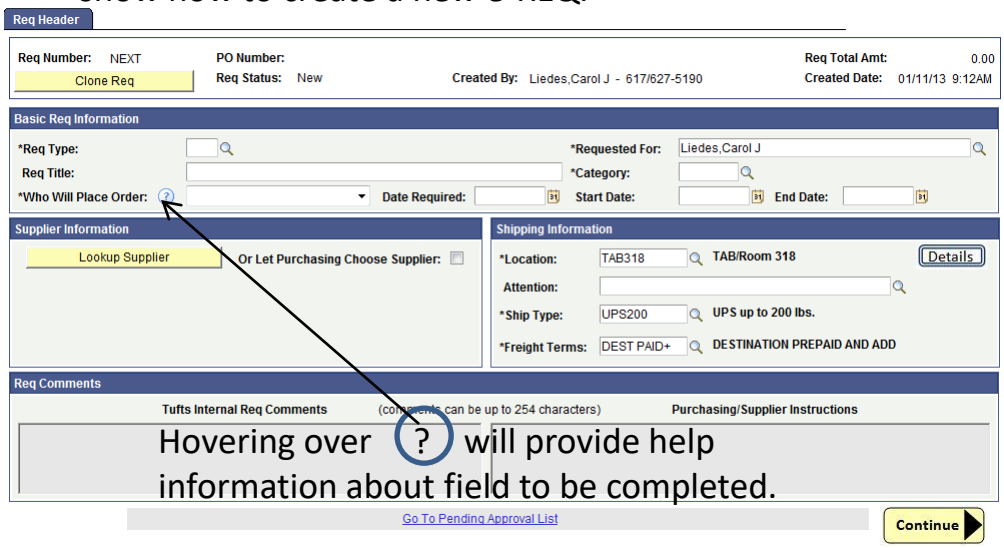
Sign into Oracle PS with this url: **http://go.tufts.edu/finportal**

Sign into Oracle/Peoplesoft with UTLN and Tufts Password, then click Sign In

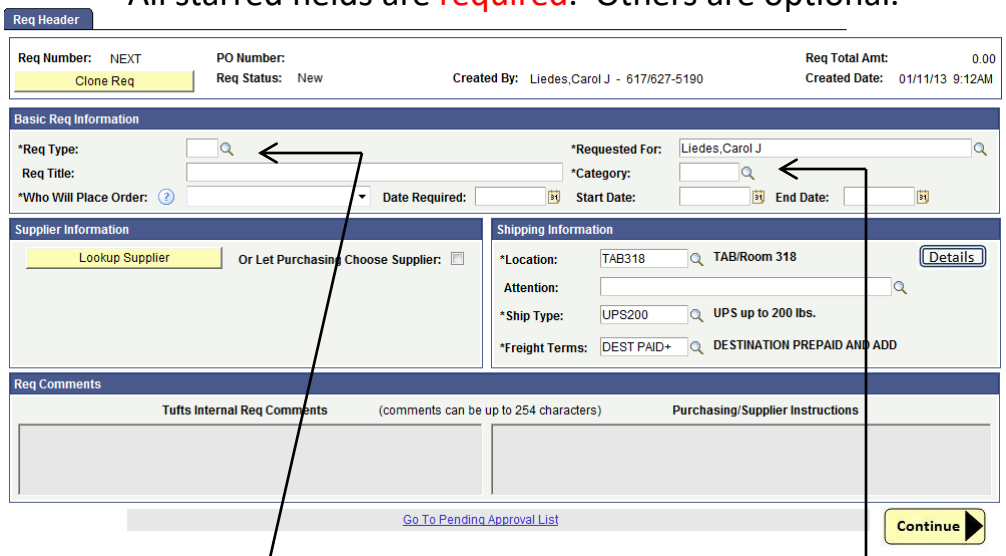
At the Peoplesoft screens will be a section for e-REQ. Specific functions appear which can be selected. This example will use Create an e-REQ.



This is the default screen. The following pages will show how to create a new e-REQ.

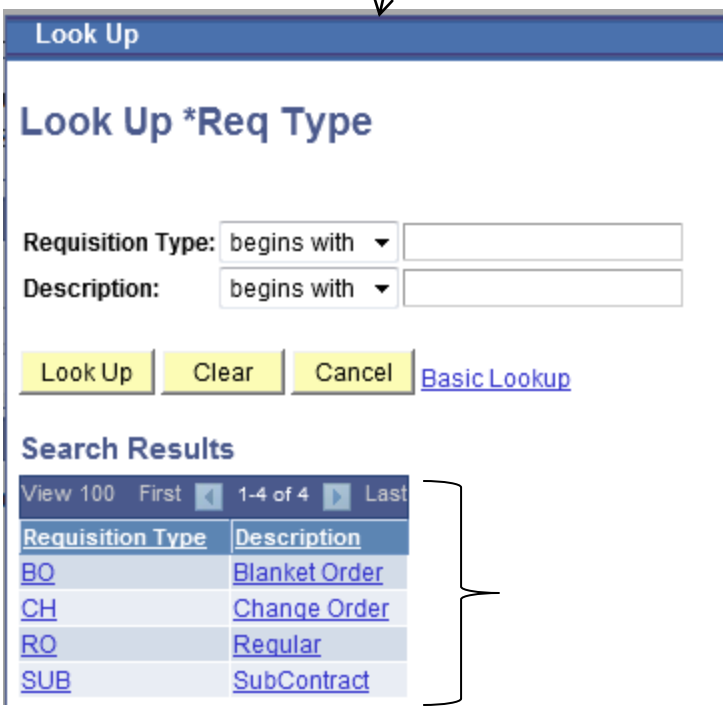


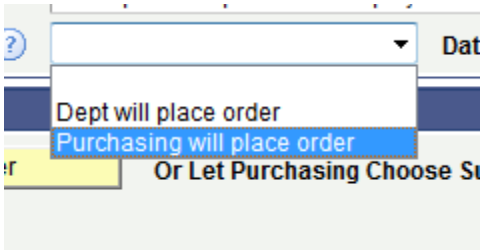
All starred fields are required. Others are optional.



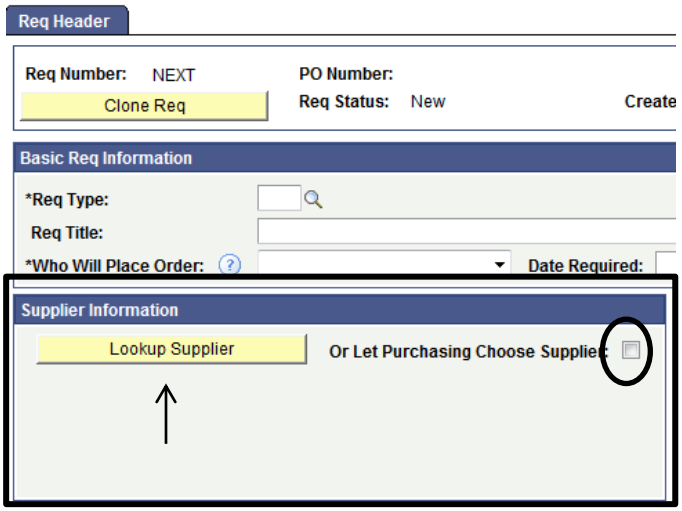
Select the Req Type using magnifying glass. A default req type can be set in the user profile.

Select Category using the magnifying glass.



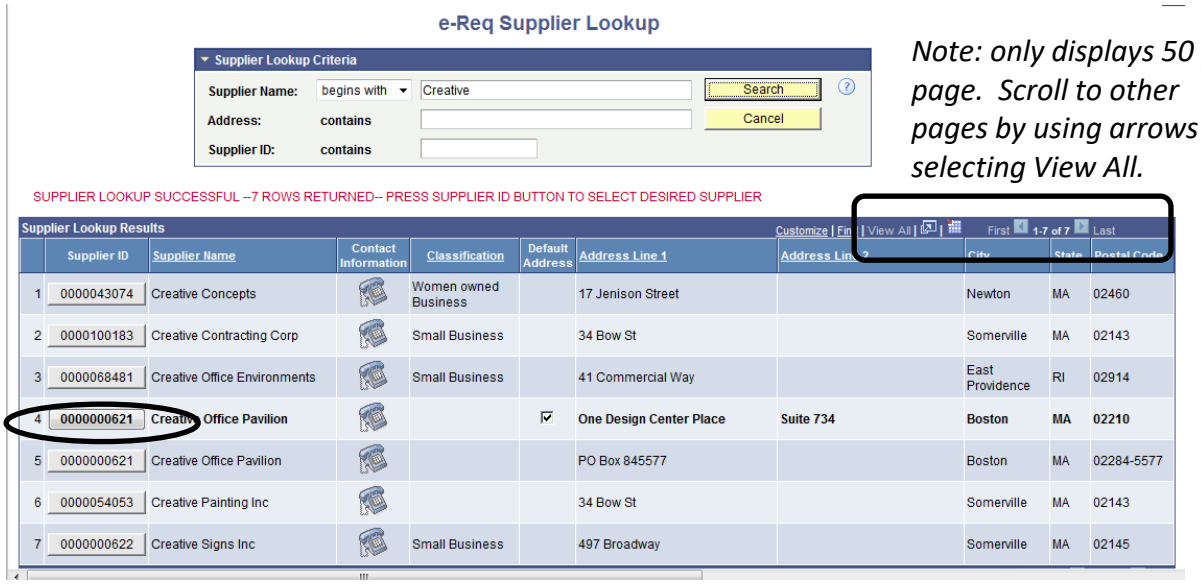


Select who will place the order with the supplier. The default is Purchasing. This will ensure the PO is sent out by Purchasing/TSS to the vendor.



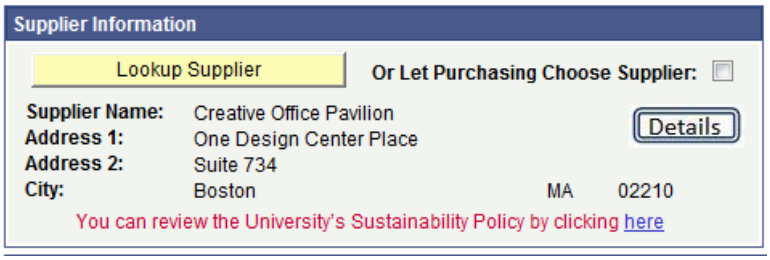
Supplier Information: Check the box to have Purchasing select or click Lookup Supplier

After clicking the Lookup Supplier button, type in search criteria & click Search . Suppliers will display (see below) . Make a selection by clicking on the Supplier ID box.



Note: only displays 50 per page. Scroll to other pages by using arrows or selecting View All.

If the supplier is not listed (new) , an invitation must be sent for the vendor onboarding in Paymentworks.



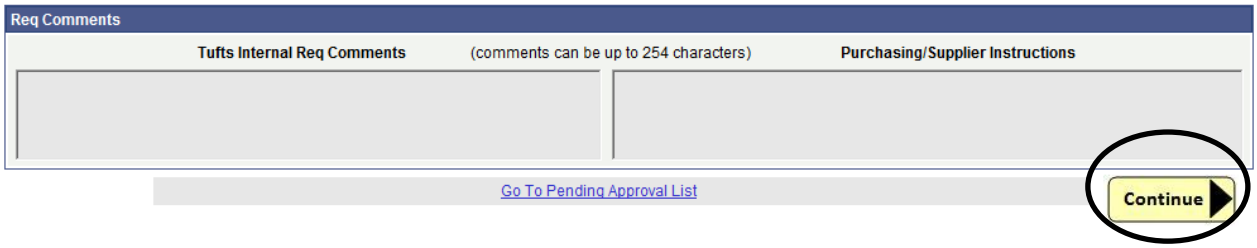
To learn about the Tufts Sustainability Policy, click on the red text.

Once a selection has been made the Supplier Information box is populated.

Details about the Supplier can be viewed by hovering over the Details button.

You may choose a supplier which requires an Independent Contractor Questionnaire to be completed. If so, go to page 14 for assistance.

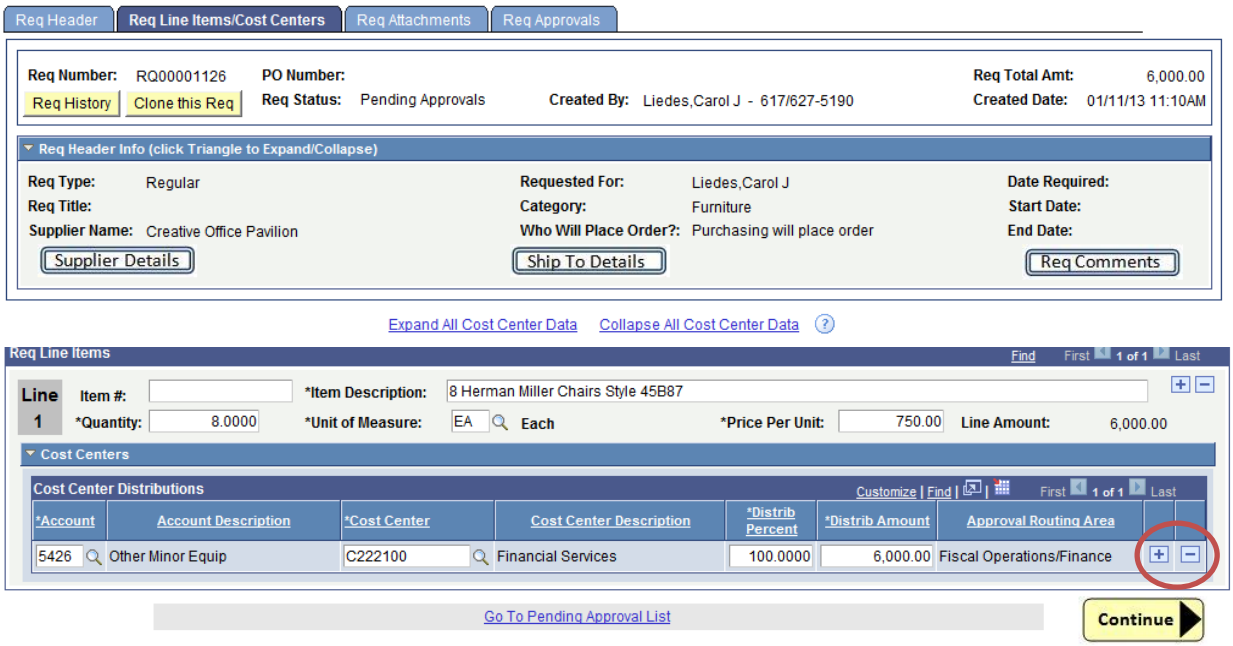
Comment Boxes



Two comment boxes appear at the bottom of the screen. The one on the left is to leave remarks or instructions to other approvers throughout the process. The box on the right is specifically for Purchasing or Supplier Instructions. **These are not required fields.**

Click the yellow Continue button to move to next page.

Req/Line Items Page

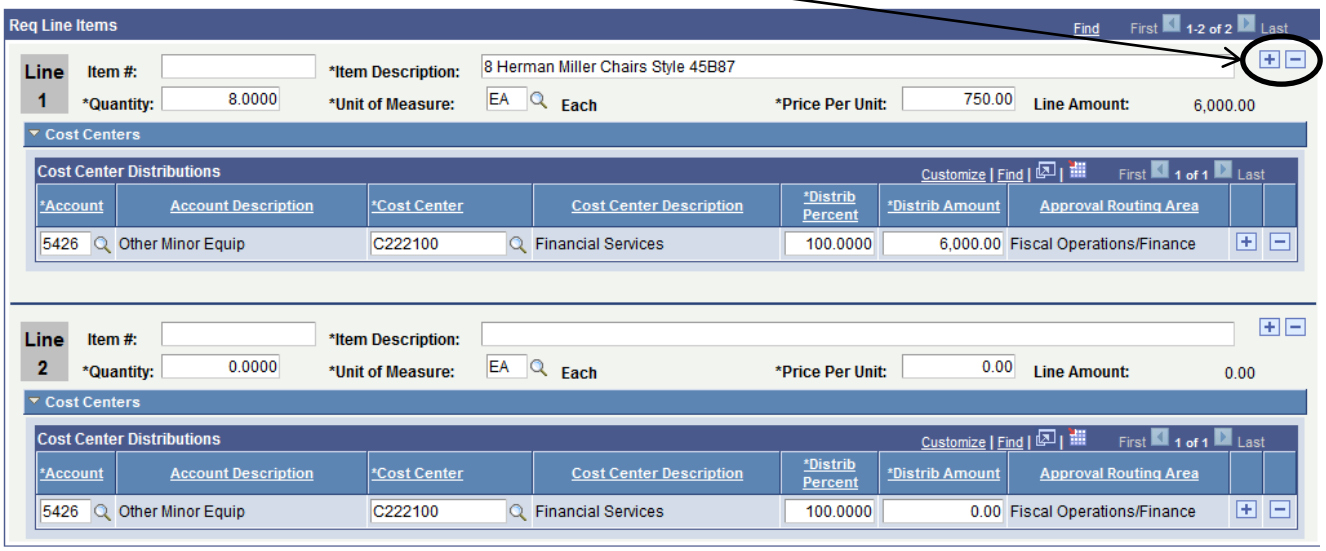


Complete the line item information for your first item. This includes description, quantity, price per unit, account #, and cost center. Complete the cost center distributions including account and cost center.

If you wish to SPLIT the charge of a line item, click the on that particular line (show above circle in red).

Insert the other funding source, then indicate the split percentage OR amount. The system will complete the calculation.

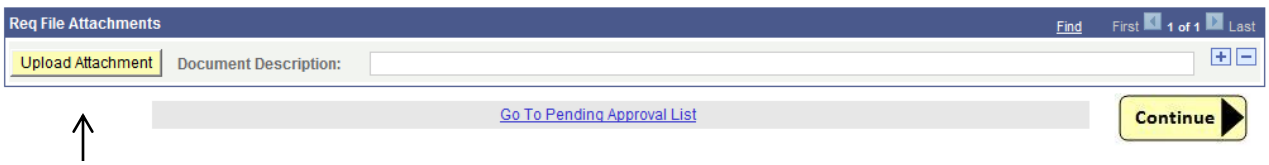
If you have a second line item from the same supplier, click the + at the top of the Line Items section.



Then line 2 and subsequent lines, if needed, can be completed. When finished, click Continue.

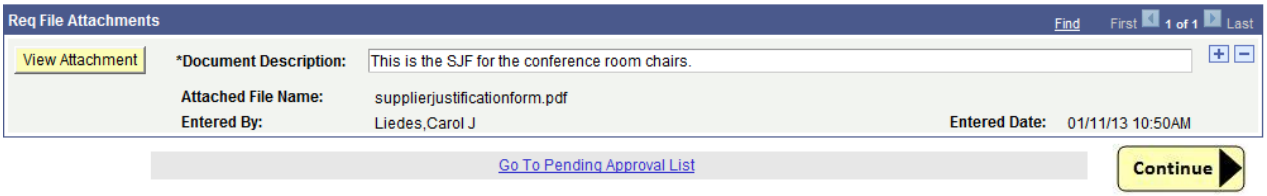
Supplier Justification and Attaching Documents

If the order is equal to or exceeds $10,000, a Supplier Justification Form appears on the screen, which needs to be completed.



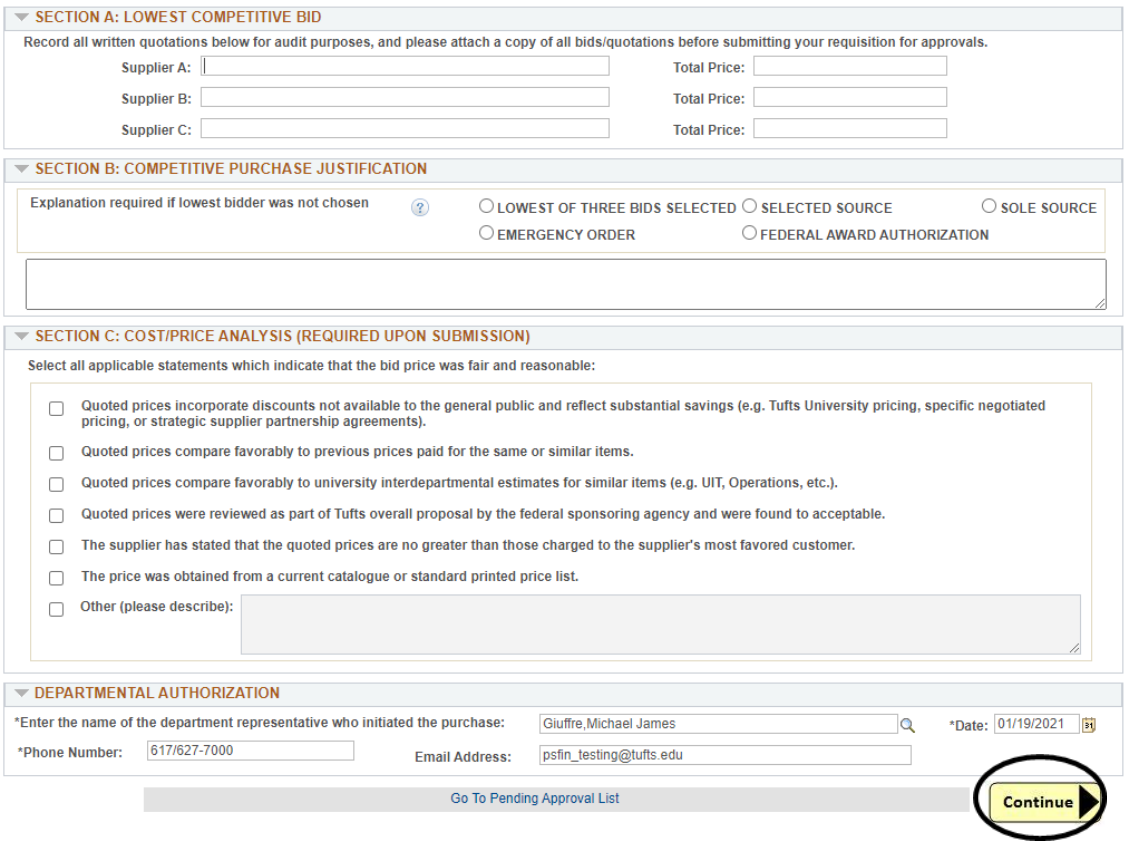
Click Upload Attachment to find any documents that you might want to attach such as quotes, letters from vendors, etc. *If the order does not include/require one (if less than $10k), then simply bypass this screen by clicking Continue.*

After clicking Upload, browse for your attachment, select it, then click Upload.

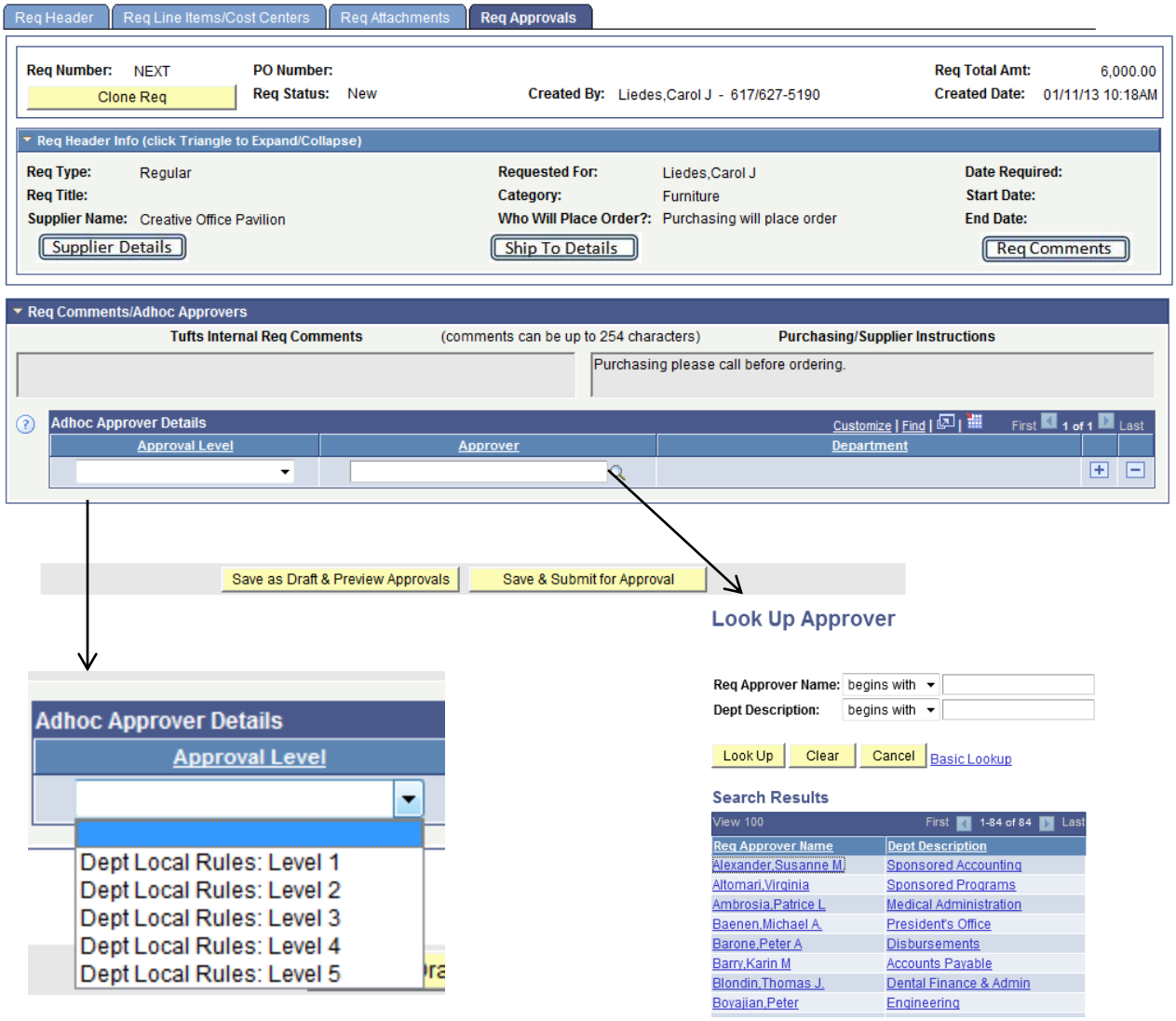


Screen will now appear with file name. If an attachment is added a document description. Click Continue unless another document needs to be uploaded. If so, click on the to add another line.

Complete the SJF document.



Req Approvals

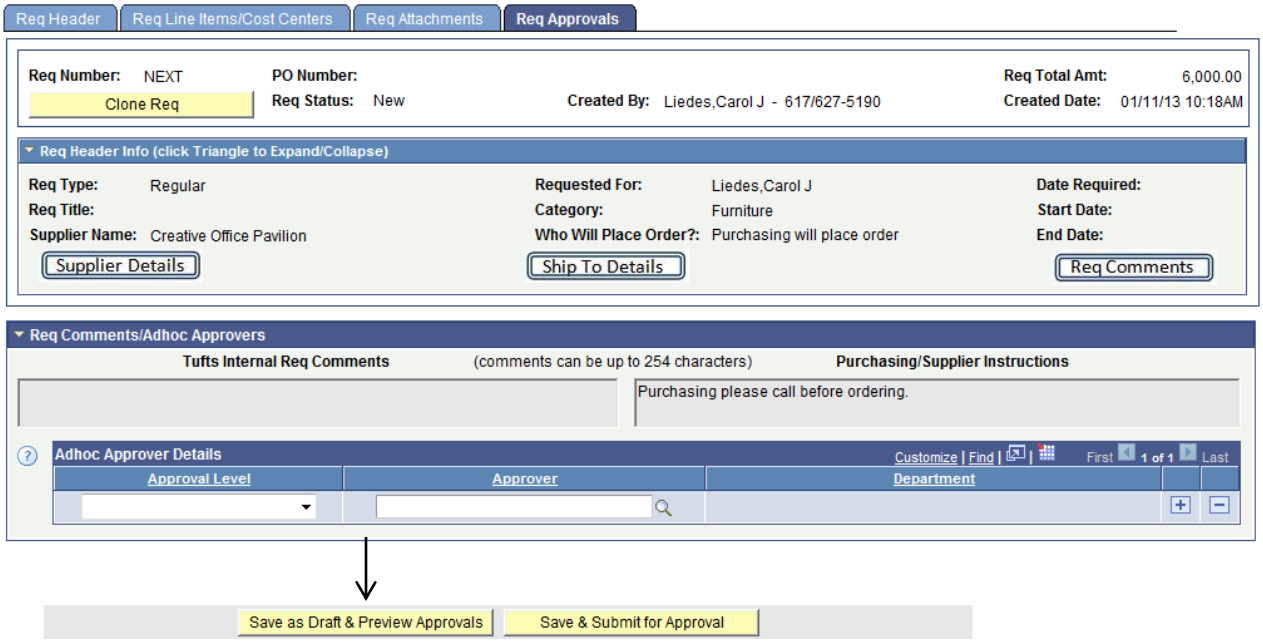


This screen is for those departments whose practice is to include Ad hoc Approvers. The Approval Level field is for sequencing. Therefore, if a particular individual needs to approve first, they are Level 1, then if another was needed after the first, insert a line for a Level 2 individual. If set up in a users profile, the Ad hoc approver(s) will automatically appear on the approval screen.

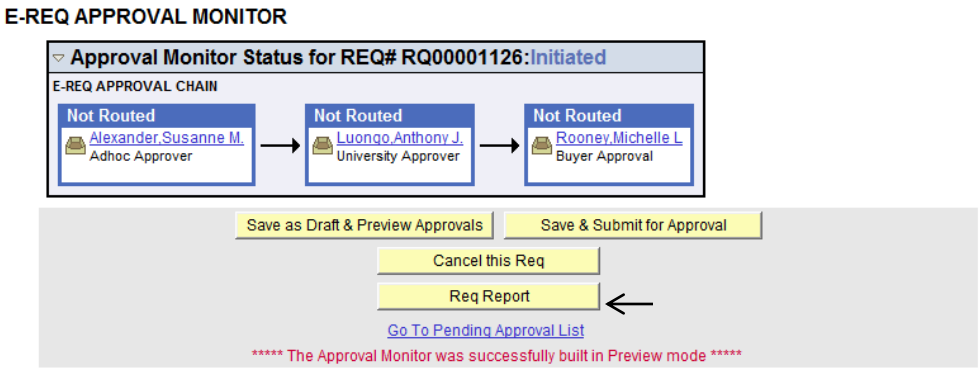
Look up an Approver's name by clicking the magnifying glass. Type in some search criteria, click Look Up, and select the individual.

If your department does not traditionally use the Ad hoc Approver feature, you can simply skip this step. Remember that the school Fiscal Officer receives EREQs for approval once the order exceeds $5,000 as well as Sponsored Programs Accounting for orders against a grant.

Req Approvals



Click Save as Draft & Preview Approvals. This will provide the user with the opportunity to do a final assessment before submitting.



If correct, click Save & Submit for Approval. The red text message will change to read: ****** The Req was successfully submitted into the Approval Chain *****

To print a Req, click on the Req Report button.

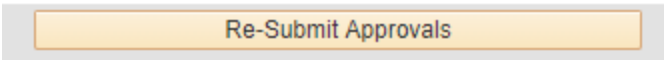
When Not Approved

An e-Req approver can take three actions: Approve, Deny or Return.

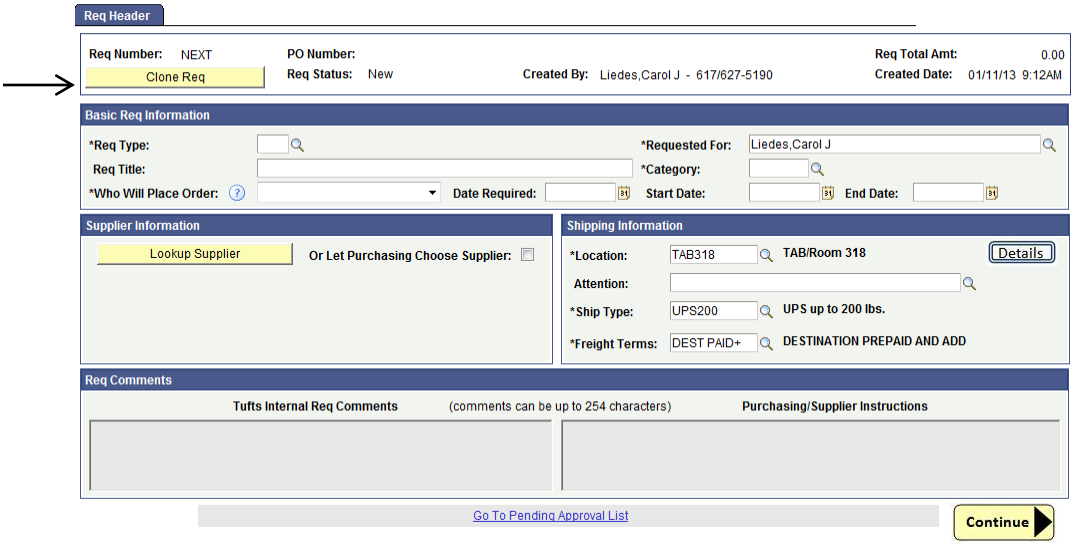
Once you are notified that an e-REQ has been either denied or returned, you will have different processing options.

Denied – When you are notified that an e-REQ has been denied, you search for the request on the inquiry screen to review the information and approver comments. To resubmit the request, you will have the ability to clone the denied e-REQ and complete the various information panels with updated information (see next page for instructions).

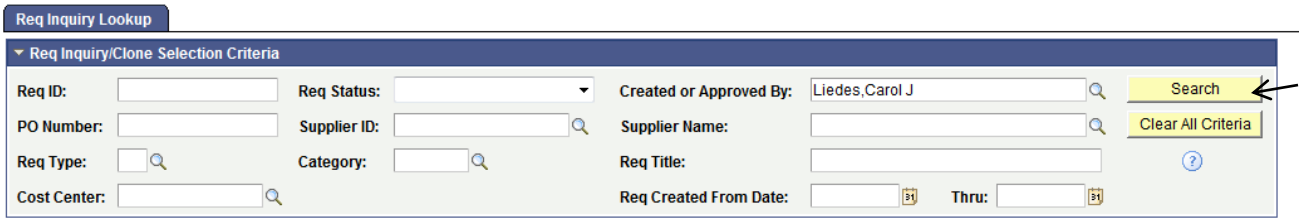
Returned - When you are notified that an e-REQ has been returned, you search for the request on the inquiry screen to review the information and approver comments. You will then only need to make the requested changes, and then you will have the option to resubmit.



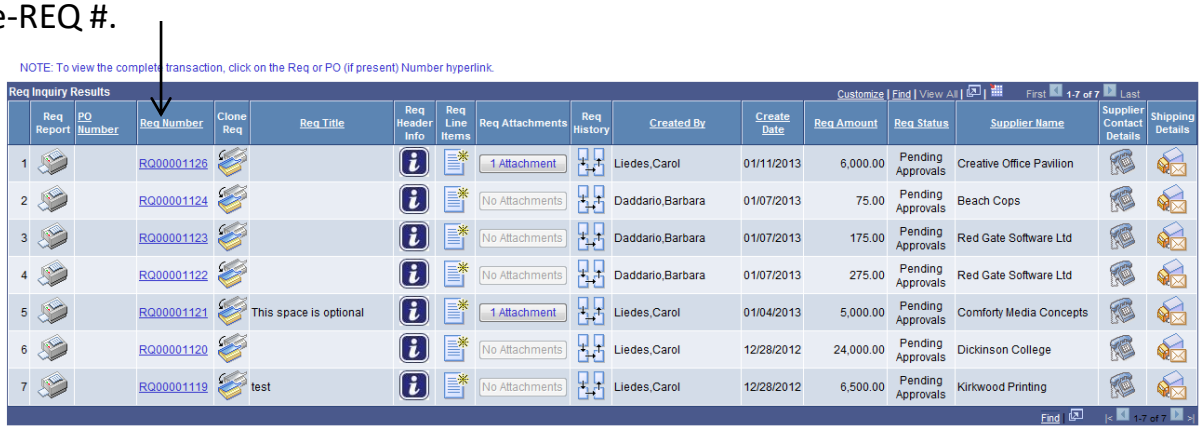
Creating a New e-REQ using the Clone Feature



Should a user wish to prepare a new requisition that is identical or extremely similar to a previous e-req completed, the Clone Req feature can be used. Click on the yellow Clone Req button.



Complete any of the inquiry fields to find the previous e-req to be cloned. For example, type in the supplier name, the PO Number, or Req ID from a previous submission. Click Search. A list will appear. Select which to clone by clicking the e-REQ #.



NOTE: To view the complete transaction, click on the Req or PO (if present) Number hyperlink.

Req Inquiry Results — Customize | Find | View All | First 1-7 of 7 Last

	Req Report	PO Number	Req Number	Clone Req	Req Title	Req Header Info	Req Line Items	Req Attachments	Req History	Created By	Create Date	Req Amount	Req Status	Supplier Name	Supplier Contact Details	Shipping Details
1			RQ00001126					1 Attachment		Liedes,Carol	01/11/2013	6,000.00	Pending Approvals	Creative Office Pavilion		
2			RQ00001124					No Attachments		Daddario,Barbara	01/07/2013	75.00	Pending Approvals	Beach Cops		
3			RQ00001123					No Attachments		Daddario,Barbara	01/07/2013	175.00	Pending Approvals	Red Gate Software Ltd		
4			RQ00001122					No Attachments		Daddario,Barbara	01/07/2013	275.00	Pending Approvals	Red Gate Software Ltd		
5			RQ00001121		This space is optional			1 Attachment		Liedes,Carol	01/04/2013	5,000.00	Pending Approvals	Comforty Media Concepts		
6			RQ00001120					No Attachments		Liedes,Carol	12/28/2012	24,000.00	Pending Approvals	Dickinson College		
7			RQ00001119		test			No Attachments		Liedes,Carol	12/28/2012	6,500.00	Pending Approvals	Kirkwood Printing		

Find | 1-7 of 7

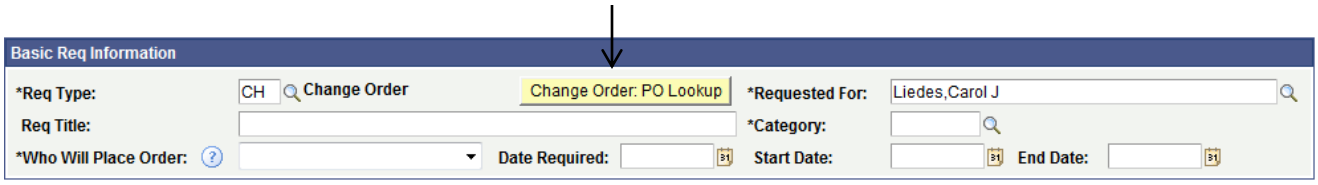
Once selected, the old e-REQ will appear for you to review and confirm that this is the correct one to be cloned. If it is, click Clone this Req.

The new e-REQ will appear, beginning with the first page. At the bottom of the page it will read as shown above. Continue with the e-REQ, making any adjustments to the order, then continue the process as on the previous pages. Item costs will need to be entered on cloned requisitions. Attachments from requisitions being cloned **WILL NOT BE INCLUDED** on the new requisition.

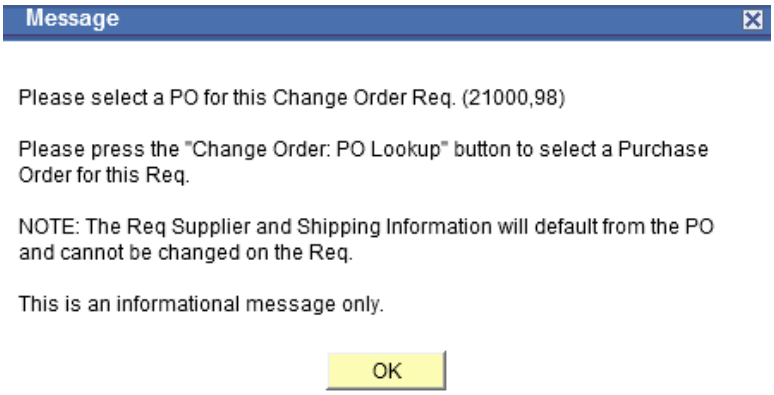
Please note: Cloning an e-REQ can be done from the PeopleSoft home page, by clicking on the second e-REQ link.

It is also from this function that one can inquire about the status of any e-Req submitted.

Creating a Change Order Requisition

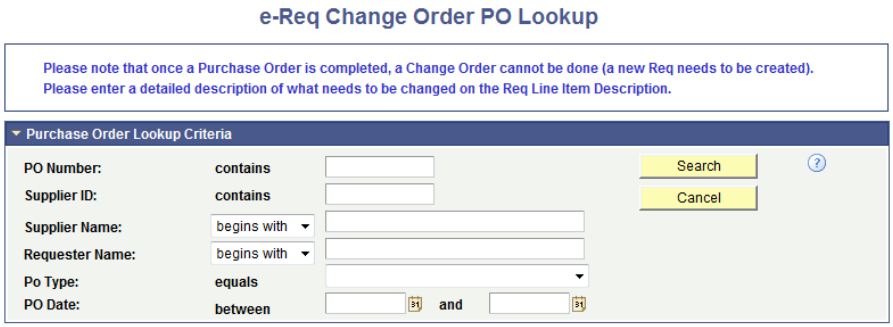


To create a Change to an existing Purchase Order, a Change Order requisition is needed. Select CH (Change Order) for the Req Type. An informational message will appear:



Click OK. A Change Order: PO Lookup button appears (see above). Click on that button to identify the PO needeeding modification.

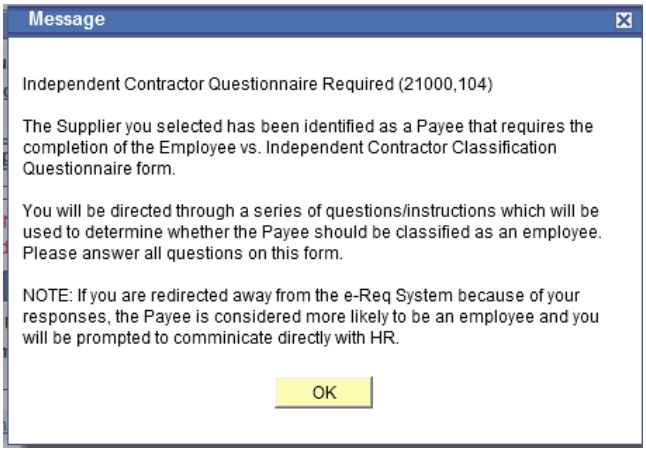
Identify some search criteria and click Search. Then select the appropriate PO to be "Changed."



Once selected, you are returned to the Req Header screen in order for the requisition to be completed.

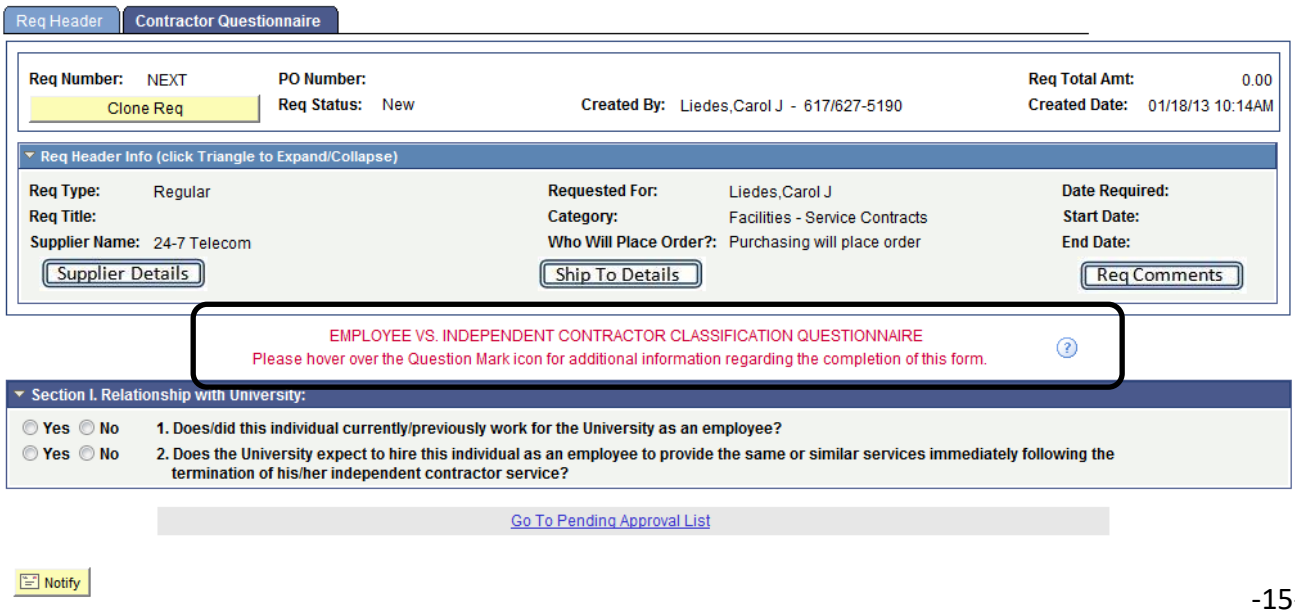
Using the Independent Contractor Questionnaire

You may choose a supplier which requires an Independent Contractor Questionnaire be completed before an E-REQ can be completed. The E-REQ system is programmed to produce this message when such a supplier is chosen. →

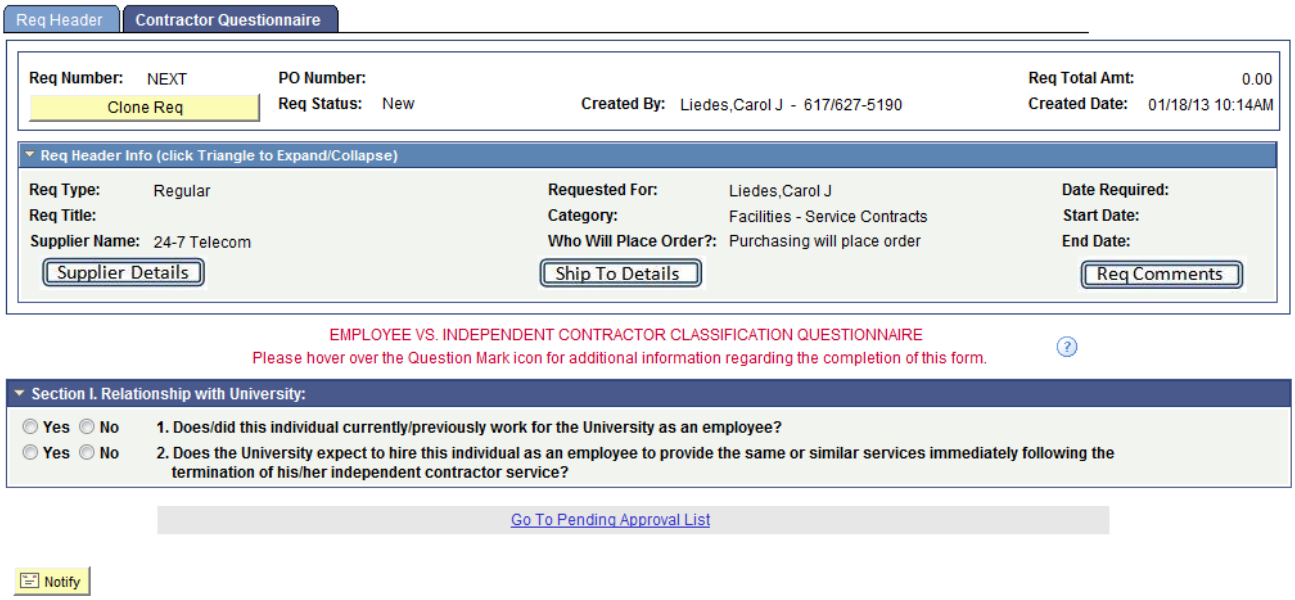


Why may this message occur?

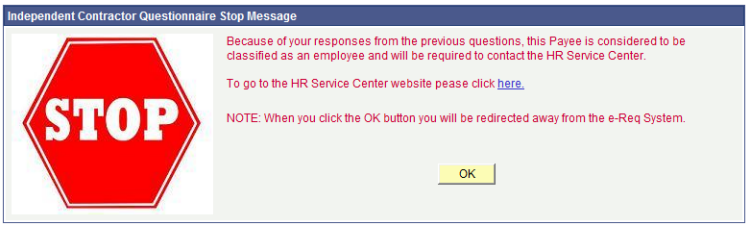
As an employer, Tufts University is designated as an IRS Withholding Agent and is responsible for properly classifying workers and withholding any/all required taxes: an IRS requirement. Failure on our part to properly classify individuals could subject the university to significant IRS penalties, fines and/or interest. As such, in order to process a complete E-REQ, requesters are required to answer a few questions regarding the nature of the proposed services. In certain cases, your responses will not allow you to continue in the E-REQ process, as your answers indicate the individual must be paid as an employee rather than an independent contractor. In such cases, you will be instructed to contact Human Resources for assistance in processing the necessary paperwork.



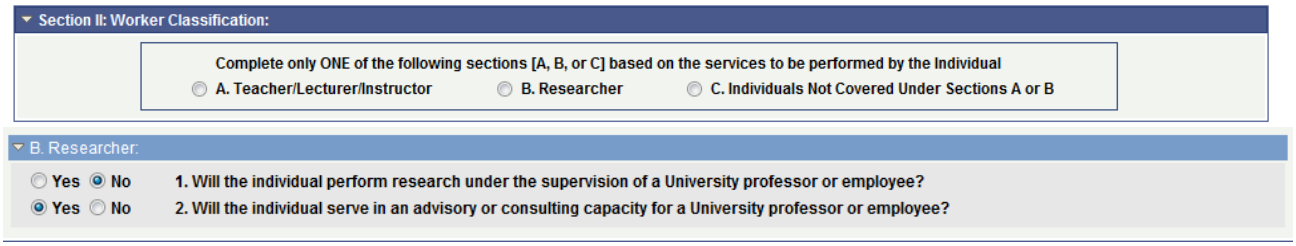
Using the Independent Contractor Questionnaire



Complete the questionnaire. If you make a selection that warrants the supplier to be hired as an employee versus an independent contractor, this message will appear:

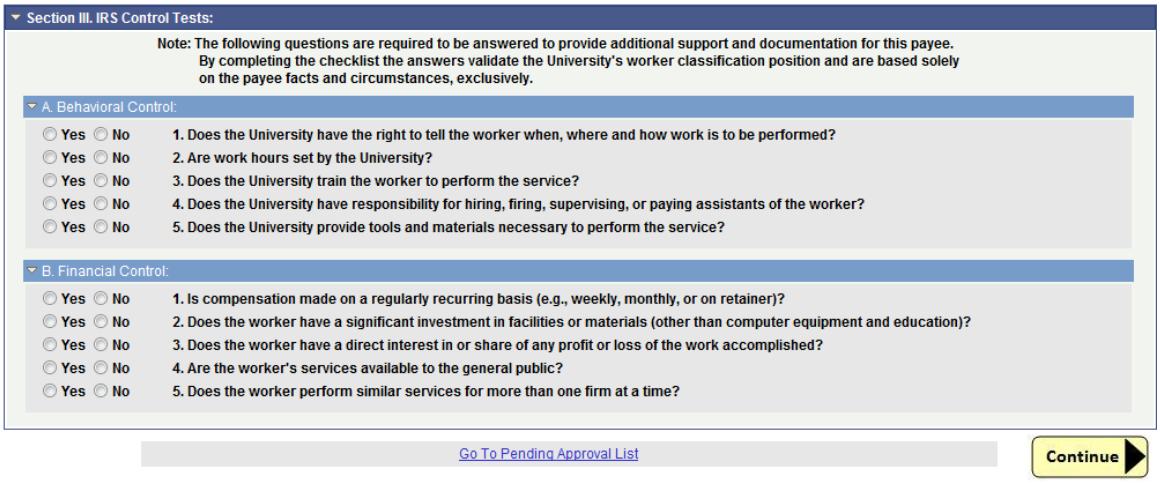


If the STOP message does not appear based on your responses, more questions will appear. Complete the questionnaire. As an example:



For future reference, if you are unsure of the proper relationship, the questionnaire is available on page 24 of this document and can be completed separately via a paper copy and submitted for review prior to entering the E-REQ system. Contact Peter.Barone@tufts.edu for assistance.

In addition, a set of questions called the IRS control test may appear. Answer all questions to confirm that this supplier is an Independent Contractor. When finished, click Continue.



If as the preparer of the requisition you don't know the answer to these types of questions, it is recommended that you print page 24 of this manual, have it completed by the appropriate individual most familiar with the activity, and then resume the E-REQ process.

To Approve an e-REQ

There are specific approval rules for the Electronic Requisitioning process that are programmed into the system. They are as follows:

- Requisitions >=$5000 on grants only will not route to the first approver
- Requisitions >=$5000 on grants route to Sponsored (before Purchasing)
- Requisitions >=$5000 will route to the Purchasing (last approver)
- Requisitions >=$250000 on account 5126 (consultants) will route to the Executive Vice President (after SPA/School)
- Requisitions for new vendors using SSN will route to TSS
- Requisitions for change orders will route to TSS regardless of the amount
- If “restricted” box is checked requisitions will route to Purchasing regardless of amount.
- If category is “Furniture” requisitions will route to the Fire Marshall and Purchasing regardless of amount
- If category is “AIA” rules Approver Level 1-3 will be bypassed and route to Facilities for approval prior to Purchasing
- If category is “Subcontracts” or “Professional Services” on a grant requisitions will route to Sponsored regardless of amount

The approval process is documented on the next three pages.

To Approve an e-REQ

The approver of an e-REQ will receive an email notification that an order is awaiting their review and approval. The email will appear as:

Reminder - Requisition RQ00001123 requires your Approval

ereq@elist.tufts.edu

Sent: Wed 1/9/2013 6:31 PM

To: Daddario, Barbara; Liedes, Carol J.

Requisition RQ00001123 is awaiting your approval (NOTE: the Requisition Creator is included in this email for informational purposes).

To approve or view the Requisition, click here:
https://fargo.uit.tufts.edu:11030/psp/FMYEND/EMPLOYEE/ERP/c/TFTF_REQ.TFTF_REQ_CREATE.GBL?Page=TFTF_REQ_APPROVAL&Action=U&BUSINESS_UNIT=TUFTS&REQ_ID=RQ00001123

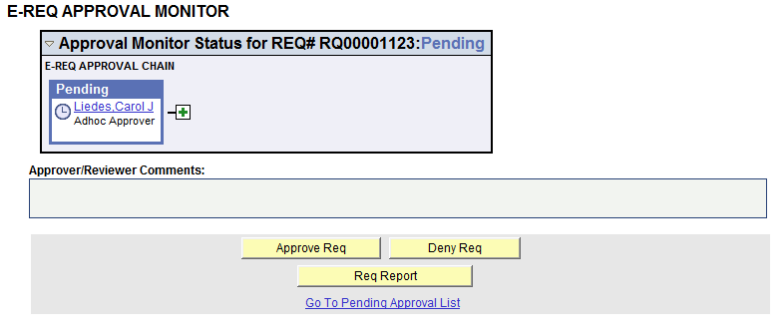
ORDER SUMMARY

Requester: Daddario,Barbara
Requisition Number: RQ00001123
Supplier Name: Red Gate Software Ltd
Requisition Title:
Order Total: 175.00 USD

Internal Comments:

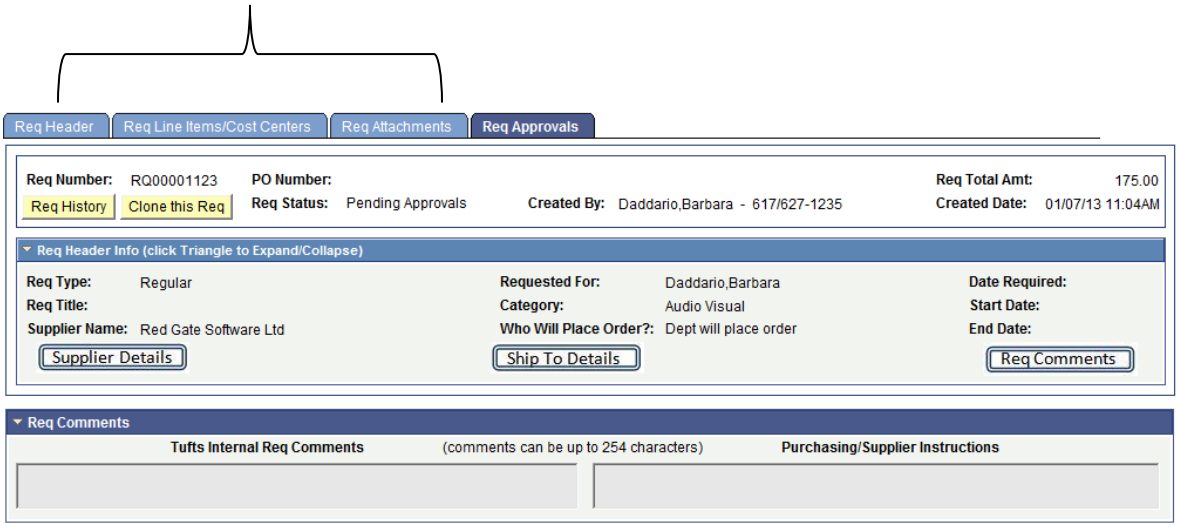
Purchasing/Supplier Comments:

The approver should click on the link within the body of the email. It will take them directly to the order once the sign-in process is complete, specifically to the Approval page, with the routing and approval functions at the bottom.



To Approve an e-REQ

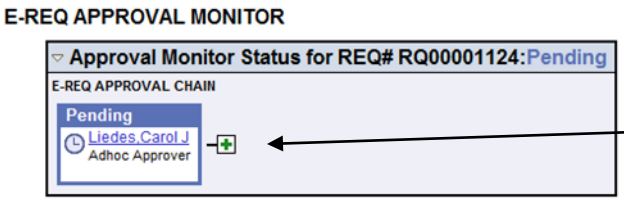
The approver can click through the tabs at the top of the page to read details about the order:



The approver can click the Approve Req, Deny Req or Return Req button on any of the pages. However, to view the Approval chain, the user must be on the Req Approvals page.

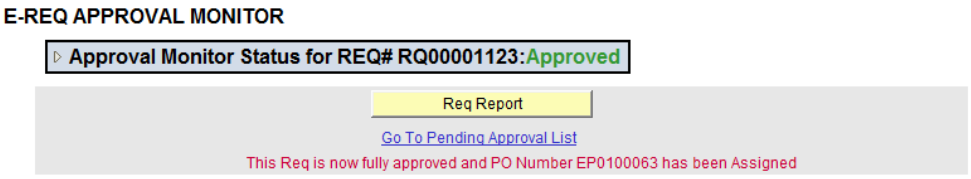
Clicking Deny Req will terminate the e-REQ, which will not allow any changes to the request, and it cannot be resubmitted. A comment needs to be added to the Approver/Review Comments box indicating why this is being denied. If a comment is not made, the approver will receive an error/reminder (see bottom of page). This request can be cloned and resubmitted after completing the various e-REQ panels.

Clicking Return Req will return the e-Req to the approver for edits and changes. All of the information that was populated on the e-REQ panels will remain, and only the changes requested in the Approver/Reviewer Comments will need to be updated.



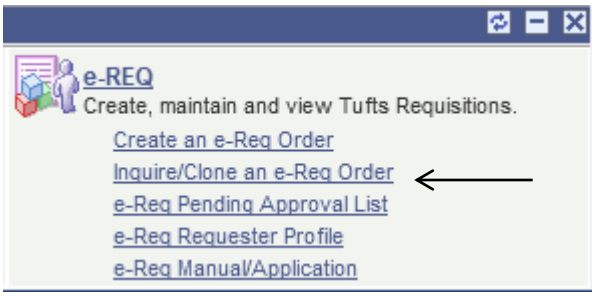
To add another (adhoc) approver, click on the + in the approval chain.

At the pop-up screen, use the magnifying glass to search for the Ad hoc approvers name. Select the name. Indicate if the individual should be inserted as an Approver or Reviewer. An Approver needs to go into E-REQ and approve. If someone is designated as a Reviewer, it is an "FYI".



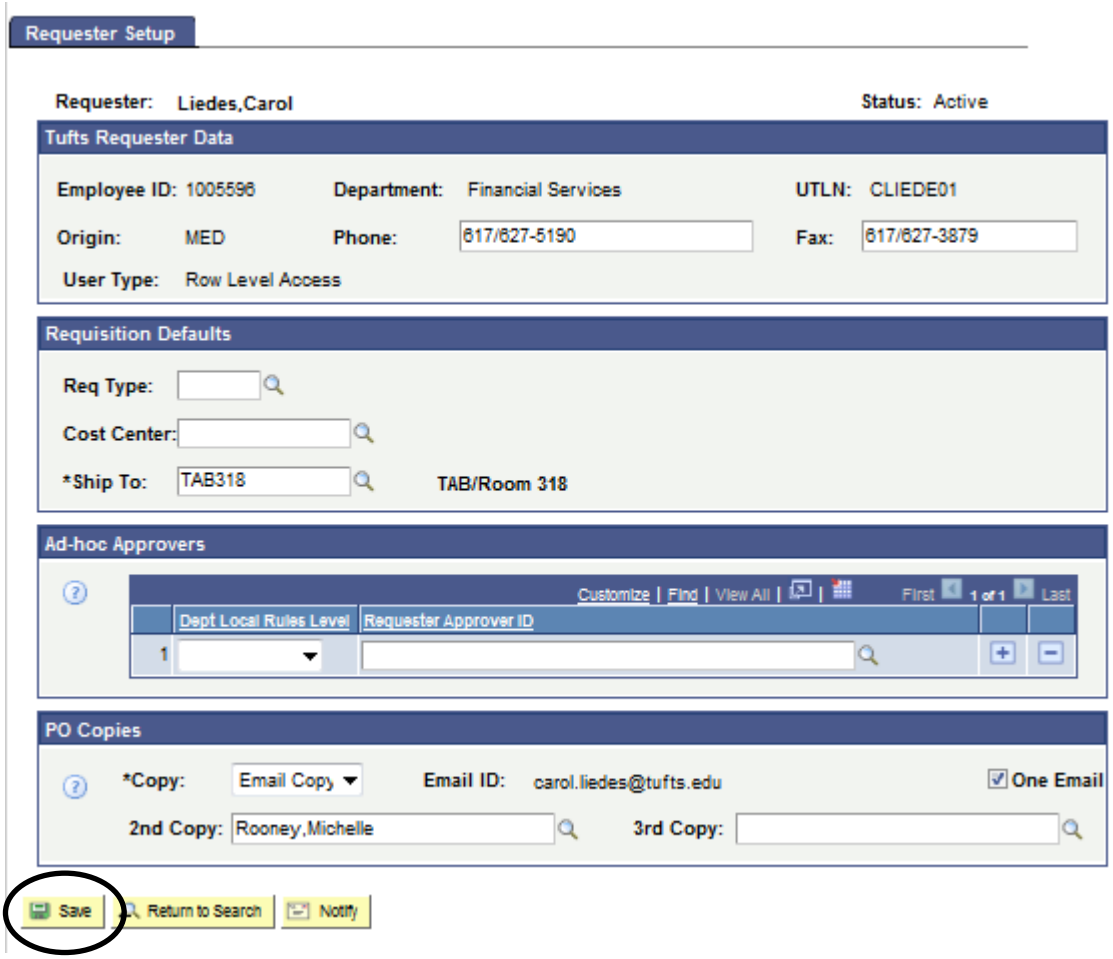
Once an E-Req is approved, this message will appear.

An approver can also approve from the PeopleSoft home screen rather than linking through an email. This may be a better approach for individuals who have many requisitions to approve. From the home page, click Approval list and select which to approve.



e-REQ Profile

A user's e-REQ profile can be modified by clicking on the e-REQ Requester Profile link. Doing so takes the user to the following page.

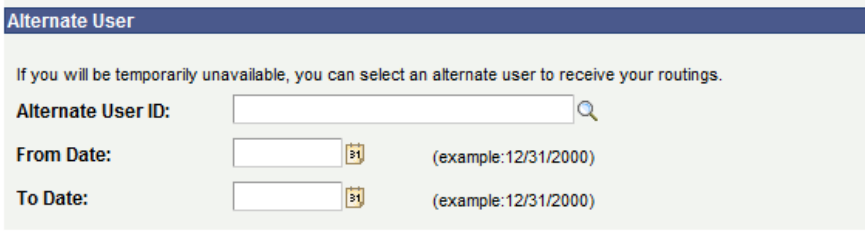


At this page, an e-REQ user can set their own defaults that they wish to see when logging into the e-REQ system. The Req Type, Cost Center and Ad-Hoc Approvers can be pre-set, as well as who should receive copies of the Purchase Order when it is created from the requisition. After setting fields, remember to click SAVE!

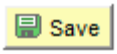
Setting an Approver Proxy

Should the occasion arise when an approver will be unavailable due to vacation, leave, etc., the approver can proxy another to approve on their behalf. The process is an online one, that begins at the PeopleSoft screen upon logging in. Click on My System Profile.

At the next screen, in the Alternative User section, identify who should be your proxy (use magnifying glass to search), and then indicate the from and to dates of that action.



Click Save at the bottom of the page when finished.



e-REQ Tips to Remember

- To access E-REQ off campus, you must use the Tufts VPN. For instructions, visit http://go.tufts.edu/finportal.
- To modify an e-REQ security profile, contact Susan Gibson with the specific add/delete of deptid, grant or project.
- Most current browsers can be used when using e-REQ in PeopleSoft. Pop-up windows must be enabled for this site.
- E-REQs will be automatically routed to Fiscal Officers and other university required approvers when the requisition equals or exceeds $5,000.
- Need to print an e-REQ? Click on Req Report on the Approvals tab.
- CHANGE ORDERS: If the e-REQ type is Change Order, the system will prompt you to look up and select the original PO# (see change order section of this document).
- If BLANKET ORDER or SUBCONTRACT is selected as the e-REQ type, the fields of Start Date and End Date are required.
- If the e-REQ type is SUBCONTRACT, and if the total is greater than $25,000, be sure to split the charge the proper accounts due to indirect costs not being charged on the amount that exceeds $25K. For example, if a subcontract total is $50,000, line 1 should be coded to 5151 for $25k and line 2 should be coded to 5158 for $25k. It is also essential that the e-REQ originator attach a copy of the signed subcontract agreement from the Office of Research Administration

e-REQ Tips to Remember

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- If you create a BLANKET ORDER, save a copy of your completed e-REQ for your records. When a blanket order becomes a Purchase Order, the dollar amount is not included.

QUESTIONNAIRE

NOTE: This checklist must be completed prior to engaging Independent Contractor services and executing a contract.

Section I. Relationship with University:

□Yes □No 1. Does/did this individual currently/previously work for the University as an employee?

□Yes □No 2. Does the University expect to hire this individual as an employee to provide the same or similar services immediately following the termination of his/her independent contractor service?

Section II. Worker Classification:

(Complete only ONE of the following sections [A, B, or C], based on the services to be performed by the Individual)

A. Teacher/Lecturer/Instructor:

□Yes □No 1. Is the individual teaching a course for which the students can receive credit toward a University degree?

□Yes □No 2. Does the University have any control over course materials that are used by the individual?

□*Yes* □*No* *3. Has the individual provided the same or* similar services as an ongoing business to other unrelated entities in the last 12 months?

□Yes □No 4. Is the individual an invited guest lecturer *(lectures in a seminar, colloquium, class, etc.)*?

□Yes □No 5. Has the individual been at the University in this capacity fewer than four times in the past 12 months?

B. Researcher:

□Yes □No 1. Will the individual perform research under the supervision of a University professor or employee?

□Yes □No 2. Will the individual serve in an advisory or consulting capacity for a University professor or employee?

C. Individuals Not Covered Under Sections A or B:

□Yes □No 1. Has the individual provided the same or similar services to other unrelated entities or to the general public as a trade or business during the last 12 months?

□Yes □No 2. Will the department provide the individual with specific instructions regarding performance of the required work rather than rely on the individual's expertise?

□Yes □No 3. Will this individual be free to perform their hired tasks and have the ability to make decisions on his/her own?

_____

Section III. IRS Control Tests:

Note: *The following questions are required to be answered to provide additional support and documentation for this payee. By completing the checklist the answers validate the University's worker classification position and are based solely on the payee facts and circumstances, exclusively.*

A. Behavioral Control:

□Yes □No 1. Does the University have the right to tell the worker when, where and how work is to be performed?

□Yes □No 2. Are work hours set by the University?

□Yes □No 3. Does the University train the worker to perform the service?

□Yes □No 4. Does the University have responsibility for hiring, firing, supervising, or paying assistants of the worker?

□Yes □No 5. Does the University provide tools and materials necessary to perform the service?

_____

B. Financial Control:

□Yes □No 1. Is compensation made on a regularly recurring basis (e.g., weekly, monthly, or on retainer)?

□Yes □No 2. Does the worker have a significant investment in facilities or materials (other than computer equipment and education)?

□Yes □No 3. Does the worker have a direct interest in or share of any profit or loss of the work accomplished?

□Yes □No 4. Are the worker's services available to the general public?

□Yes □No 5. Does the worker perform similar services for more than one firm at a time?