

# PeopleSoft Documentation Requirements

Uploading purchasing documents into PeopleSoft is critical for efficient approval workflow and procurement transparency. Please follow the guidelines below.

## Requisitions

### Where to attach:

In the Comments section on the first line of the requisition.

Cart Summary: Total Amount 145,740 USD

Expand lines to review shipping and accounting details

+

Add More Items

Requisition Lines									Details	Comments	Delete
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total				
▶ 1	PITT-TECH GLOSS SAFETY YELLOW	000000000100468668	THE PITTSBURGH PAINTS CO	<input type="text" value="1.0000"/>	Each	23.7800	23.780			Add	
▶ 2	7-LINE INT/EXT INDUSTRIAL GLOS	000000000100468669	THE PITTSBURGH PAINTS CO	<input type="text" value="1.0000"/>	Each	19.7200	19.720			Add	

Click the Add Attachments button to upload documents.

Line Comment

Business Unit 00061 Requisition Date 12/05/2025 Status Open

Line 1

Comments

Find First 1 of 1 Last

Entered On: 12/05/2025 1:36:38PM

1

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Add Attachments

Attachments

Attached File	User/Date Time	View	Send to Supplier
1 Specs.docx	G0021142025-12-05-13.40.48.846	<div>View</div>	<input type="checkbox"/>
2 Request_for_supplies.msg	G0021142025-12-05-13.41.45.929	<div>View</div>	<input type="checkbox"/>

### What to attach (if applicable):

For purchases <\$5000:

- Emails from the requester.
- Approval from IDOA Vendor Manager (if purchasing outside a QPA).
- Specifications.
- Record of Special Procurement form for purchases <\$5000.  
[Record of Special Procurement fillable.pdf](#)
- IOT approval (for all IT purchases).

For purchases >\$5000:

- Emails from the requester.
- Approval from IDOA Vendor Manager (if purchasing outside a QPA).
- Specifications.
- IOT approval (for all IT purchases).

## Sourcing Events

### For purchases \$5000 - \$74,999

(Purchases of \$75,000 and over are administered by IDOA. IDOA will create the sourcing event).

### Where to attach:

Event Comments and Attachments (in Create Events)

#### Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

\* Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Payment Terms and Contact Info

Event Constraints

Event Reminder Notification

Use the Add Attachment button to upload bid documents. Name the document in the Attachment Description field. The three checkboxes (Display to Bidder, Include On Award, and Include in Notifications) should be unchecked.

Enter Comments ⓘ

1 of 1

View All

+

-

Comments:

☐ Send To Bidder
 ☐ Include On Award

Standard Comments

Add Attachment

Attachments ⓘ

1-1 of 1

Select	Attached File	Attachment Description	Display to Bidder	Include On Award	Include in Notifications		
<input type="checkbox"/>	6776.docx	Bid Package	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View	-

Select All

Clear All

Download

### What to attach:

- Bid package
- Specifications (if applicable)
- Any other bid documents which require attention from bidders.
- Addendums (if a new event version is created)

Note: PeopleSoft will post the Event Details document in Event Comments and Attachments after the event is posted.

Event Description Field:

The Event description field should contain, at a minimum, the following language. This language will appear on IDOA’s Current Bid Opportunities website (IDOA: Procurement: Current Business Opportunities) after the event is posted. Communicating key bid information to potential bidders helps ensure you administer a successful, competitive sourcing event.

- A brief description of the requested goods or services. For example:  
“Sourcing event #0000086245 is for obtaining bids for vendor to provide a hosted Learning Management Service (LMS) platform with administrative access, technical support, and access to a national course catalog.”  
“Stone Order for Brookville Lake - stone is needed for re-surfacing trails, parking lots, around buildings, etc. Aggregate stone for use on access lanes, around buildings, and for erosion control purposes.”
- “Responses must be emailed to <enter buyer email address> or mailed to: <enter buyer name and mailing address>. This bid is NOT eligible for electronic submission through the supplier portal.”
- “A completed bid package MUST be submitted by the due date/time. The bid package is available for download through the Bid Documents link in the Event Name column.”
- “If you have any questions, please contact <enter buyer name> at <enter email address and phone number>.”

If an addendum to the sourcing event is required, a new event version must be created ([see p.3 of How to Post Agency RFQs](#)) and the language below must be added at the top of the Event Description field. Adding this information helps communicate to potential bidders that the bid has changed since it was originally posted.

Supplier Bid Responses (created by agency)

Where to attach:

Line Comments and Attachments in Create Bidder Response.  
Click the View/Edit Question Comments and Attachment icon on Line 1.

★Bid Required

Line Comments/Files

Lines

<

>

1-1 of 1

>

>

View All

Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	No Bid	Your Total Bid Price		
1	test	EA	1.0000	1.0000	<div></div>	<div></div>	0.0000 USD	Bid	<div></div>

Use the Upload button to upload the bidder’s bid documents.  
If more than one bid document needs uploaded, use the Add New Attachment link to add a new line.  
Continue to upload and add lines, as needed.

Line Comments and Attachments

×

Help

Event ID 0000086360    Line 1

test

Attachments

Add New Attachments

1-2 of 2

Attached File	Attachment Description	Upload	View		
6763.docx	Bid Package- Supplier XYZ	Upload	View	Add New Attachments	Delete
		Upload	View	Add New Attachments	Delete

What to attach:

- Bidder’s completed bid package.
- Any other bid documents required from the bidder.

Bid Responses must be created for ALL bidders.

Purchase Order (with no contract)

Where to attach:

PO Header Comments

Click Add Comments on the Maintain Purchase Order screen (the link will read “Edit Comments” if comments have already been entered).

Maintain Purchase Order

Purchase Order

Business Unit 00061

PO ID NEXT

Copy From

Header

\*PO Date 12/04/2025

Supplier Search

\*Supplier

Supplier Details

\*Supplier ID

\*Buyer

PO Reference

Header Details

PO Defaults

PO Activities

Actions

Activity Summary

Add Comments

Add ShipTo Comments

Ar

Use the Add Attachment button to add a document. Repeat to add all required documents. The Send to Supplier checkbox for each document should be unchecked.

**Comments**

 | < > 1 of 1 > >>

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Use Standard Comments

Comment Status    Active    Inactivate

☐ Send to Supplier      ☐ Show at Receipt  
☐ Show at Voucher      ☐ Approval Justification

Add Attachments

### What to attach:

- DPAP Solicitation Summary and related documentation.
- Split bid analysis spreadsheet for all solicitations with 15 or more lines.
- IDOA Vendor Manager Approval (if purchase was made outside of QPA)
- Clearance checks (DWD and DOR). Required if PO is greater than \$2500.
- Proof of Secretary of State registration or proof that the supplier isn't required to register with the Secretary of State. Applies to all dollar amounts.
- State and Federal suspended supplier lists (with proof awarded supplier is not on it). Applies to all dollar amounts.
- SPR Documents (if applicable), including SPR justification form, IDOA approval, and supplier quote.
- IDOA Award Recommendation letter (if IDOA administered the solicitation)
- Any additional approvals or documentation specific to the purchase (such as an approved State Surplus Property form, internal agency forms, or justification and proof of fair and reasonable pricing if purchased outside of QPA.)
- Any quote paperwork not attached to the sourcing event before it was awarded.
- Copies of contracts not posted on the Indiana Transparency Portal.

## Purchase Order (with a contract)

**Where to attach:**

“Add Supplemental Documents” link on SCM contract Document Management page.

Note: If the contract already has documents attached, the link will read “Modify Supplemental Documents.” Whichever way the link reads, upload the attachments there.

**Document Management**

SetID	STIND	Contract ID	00000000000000000098289
Supplier	HIRAM J HASH AND SONS INC		
Contract Style	General Contract		
Document Type	SOI Professional Services		
Description	test document		
Administrator	Moorman,Greg-061		
Sponsor	Department		

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Version	0.00	Created On	12/04/25 11:12AM
Status	Draft	Last Modified On	12/04/25 11:11AM

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**View and Edit Options:**

View Document

Edit Document

Add Supplemental Documents

Document Modification Summary

Document Version History

**Review and Approval:**

Route Internally

Preview Approval

Submit for Approval

Bypass Approvals

Internal Contacts/Signers

External Contacts/Signers

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