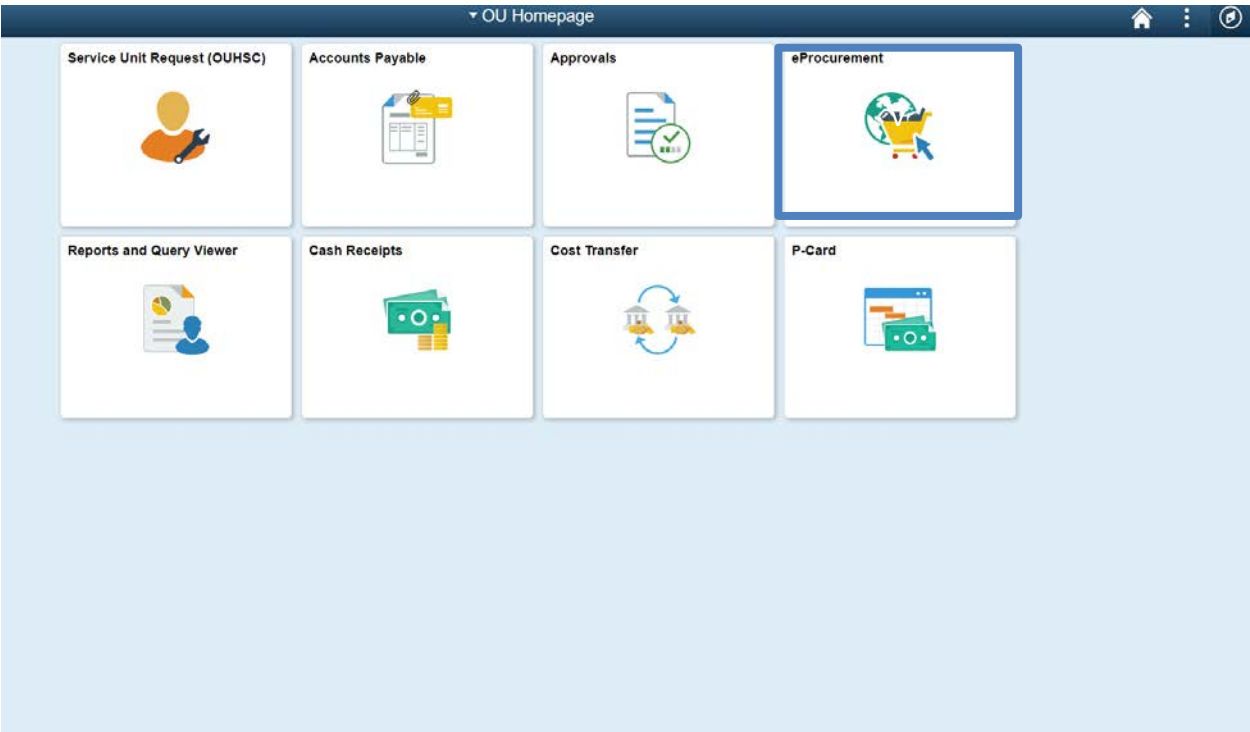




Step	Action
Navigation: eProcurement - Requisition	
1	<p>Requisitions are requests to purchase goods or services. Per Regent's Policy, Requisitions must be used for any purchase in excess of \$5,000, any purchase that requires a contract, and/or purchases that include a service in any dollar amount. To enter a Requisition, first ensure that defaults are setup for shipping and accounting information.</p>
2	<p>Login to Peoplesoft and select the eProcurement tile.</p>
 <p>The screenshot shows the 'OU Homepage' dashboard with several functional tiles. The 'eProcurement' tile, which features a shopping cart icon with a globe, is highlighted with a blue border. Other visible tiles include 'Service Unit Request (OUHSC)', 'Accounts Payable', 'Approvals', 'Reports and Query Viewer', 'Cash Receipts', 'Cost Transfer', and 'P-Card'.</p>	
3	<p>Select Requisition on the left navigation.</p>



4 Select the **Special Request** link.

5 For each item or service, you will add a separate line to the requisition. To add a line, **enter a description of the item or service**. If buying items, the Item Description must match the description on the quote. The quote below shall be used as an example to create a requisition for items.



This quote has two types of items, with different descriptions and prices, and is ordering two of each item.

Qty Ord	Item Description	SKU# MFR#	Item Price	Amount
2	SMITH-VICTOR 36" PRO-DUTY COPY STAND w/LED LGHT KI/REG	SM36PDCSKT (402182)	292.49	584.98
2	VELLO WIRED REMOTE I/CANON DSLR w/3-PIN II/REG	VERSC2II (RSC2II)	5.96	11.92

6 Enter the Item Description to match the quote exactly, with one exception. Peoplesoft cannot process credits or negative balances within the funding lines. Instead of entering negative balance lines, instead apply the credit amount to another line. Enter the price of a single item, so in this example \$292.49. The Quantity is 2. There are only two options for the Unit of Measure available: **Ea for 'each' and Lot**. Since this **example order** has a defined quantity of items and set incremental prices, this is a 'definite quantity' purchase; **use Ea**.

If the order has an 'indefinite quantity,' or is **a service** or **unknown quantity contract**, then **LOT** is used and the **quantity is always 1**. You may select the looking glass by the Unit of Measure to find the available options.

Fill in the **Category code** and **Supplier ID number**. If the Supplier ID is not yet available, because it is being established with OU Suppliers, or if this is a request to release a solicitation, use the Best Source supplier ID: 9188888888.

This ID can be updated in the requisition later by the Requestor. Procurement will not source a Purchase Order to a Best Source supplier ID.

Notes may be entered in the additional information box if they are needed to be displayed in the line on the Purchase Order. Line notes are not required. If the notes need to be displayed on the PO, select the checkboxes by the **Send to Supplier**, **Show at Receipt**, and **Show at Voucher**.

Select Add to Cart.



Create Requisition ?

Welcome Kimberly J Helton

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

All Request Options
Web
OU Marketplace
Special Requests

Special Requests ?
Enter information about the non-catalog item you would like to order:

Item Details

*Item Description Smith-Victor 36" pro-duty copy stand w/LED light KitREG
 *Price 292.49 *Currency USD
 *Quantity 2.00 *Unit of Measure
 *Category 660400 Due Date

Supplier

*Supplier ID 9100035226
 Supplier Name

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart

Look Up Unit of Measure ×

Unit of Measure begins with
 Look Up Clear Cancel Basic Lookup

Search Results
 View 100 First 1-2 of 2 Last
 Unit of Measure Description Short Description
 EA Each Each
 LOT Batch Lot Batch Lot

7 Now **add the second line item**. The Supplier ID and Supplier Name stay in the request. The notification checkboxes also remain checked. Select **Add to Cart** once the second item information is entered. Then select **Checkout**.

Create Requisition ?

Welcome Kimberly J Helton

Home My Preferences Requisition Settings 1 Line Checkout

Request Options Search All Search Advanced Search

All Request Options
Web
OU Marketplace
Special Requests

Special Requests ?
Enter information about the non-catalog item you would like to order:

Item Details

*Item Description Vello Wired Remote #/Canon DSLR w/3-PIN II/REG
 *Price 5.99 *Currency USD
 *Quantity 2.00 *Unit of Measure ea
 *Category 660400 Due Date

Supplier

*Supplier ID 9100035226
 Supplier Name B&H PHOTO-VIDEO-PRC

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Add to Cart



8 **Name the requisition.** This can be the supplier name, or the service being received. Make it something that will be meaningful to you if you need to look up the requisition later.

9 Next select the **small triangle** on each line.

10 Change the **Ship To address** from **Default** to the **location** the item or service will be provided.



Cart Summary: Total Amount 596.90 USD

Expand lines to review shipping and accounting details + Add More Items

Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Smith-Victor 38" pro-duty copy	B&H PHOTO-VIDEO-PRO-AUDIO	2.0000	Each	292.4900	584.98		
Shipping Line 1		*Ship To: DEFAULT	Quantity: 2.0000	Price: 292.4900		Add Shipto Comments Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields		
		Address: SAME AS SHIPPING						
		Attention To: Kimberely J Helton						
		Due Date:						
Accounting Lines								
2	Vello Wired Remote f/Canon DSL	B&H PHOTO-VIDEO-PRO-AUDIO	2.0000	Each	5.9600	11.92		
Shipping Line 1		*Ship To: DEFAULT	Quantity: 2.0000	Price: 5.9600		Add Shipto Comments Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields		
		Address: SAME AS SHIPPING						
		Attention To: Kimberely J Helton						
		Due Date:						
Accounting Lines								

11 Select the **triangle** beside the **Accounting Lines**. You may personalize how these chart fields display. For example, select **Personalize**, select the **Dist Type** and then select **Hide**. Scroll down to the bottom of the pop out and select **OK**. This field will no longer display.

*Ship To: 2750_0001 Add Shipto Comments Quantity: 2.0000 Price: 292.4900

Address: 2750 VENTURE DRIVE, ROOM 0001, NORMAN, OK 73069

Attention To: Kimberely J Helton

Due Date:

Accounting Lines

*Distribute By: Qty SpeedChart:

Accounting Lines Personalize | Find View All | First 1 of 1 Last

Line	Status	Dist Type	*Billing Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		DEFAULT	2.0000	100.0000	584.98	NORMN	

Grid Customization

To order columns, highlight column name, then pre: the appropriate button. Frozen columns display under every tab.

Column Order

- Tab Chartfields1
- Line
- Status
- Dist Type (hidden)**
- Quantity
- Percent
- Merchandise Amt
- GL Unit
- Entry Event
- Tab Chartfields2
- Account
- Fund
- Org
- Function
- Entity
- Source
- Purpose

Hide

Accounting Lines

*Distribute By: Qty

Accounting Lines Chartfields1 | Chartfields2 | Details | Det

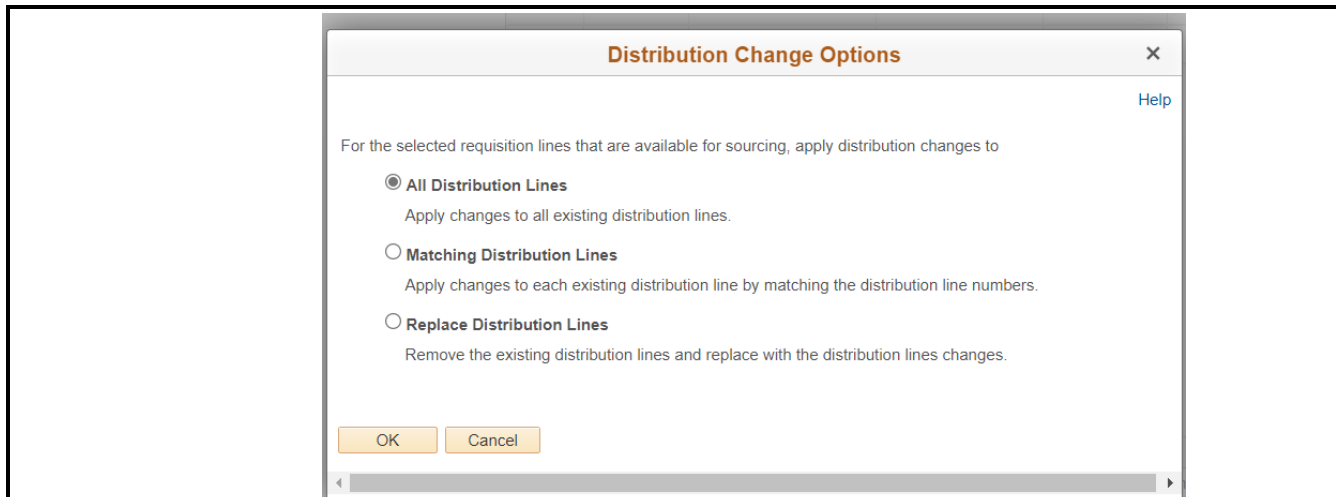
Line	Status	*Billing Location
1	Open	2750_0001



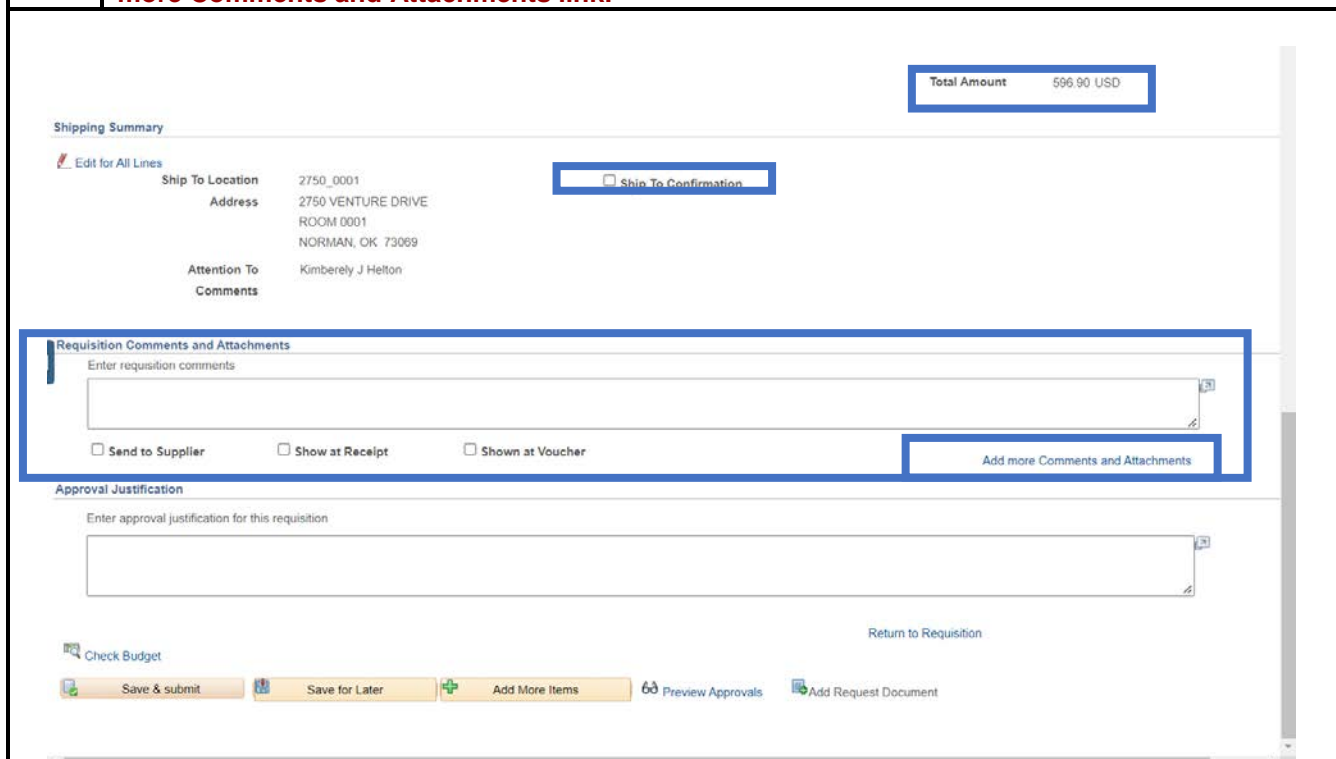
12 Fill in your Department's **accounting codes** and the **GL code specific to each line**. If you are unsure what codes should be used in the Accounting Lines, please contact Finance.

13 If you have multiple lines that have the same accounting. Select the lines the information will apply to, and then select the **Mass Change** link. Enter the **accounting information** and then select **OK**.

14 A pop up appears verifying how to make the changes. For this example, the All Distribution Lines is selected. **Select OK**



15 Scroll to the bottom of the screen and **verify the Total amount** of the requisition. If correct, **select Ship To Confirmation, enter requisition comments, attach documents* using the Add more Comments and Attachments link.**



16 Please provide the following documents as they apply to each requisition:

- Requisition Entry Form
- Signed Sole Source Form
- Quote
- Contract
- Signed Independent Contractor Form
- IT Risk Assessment



- Data Governance Committee approval
- If a solicitation, please provide:
 - Scope and pricing
 - Evaluation criteria
 - Evaluation Committee member names
 - A list of at least 3 potential vendors to send the solicitation to consider

17 **Select the checkboxes** by the **Send to Supplier, Show at Receipt, and Shown at Voucher**. These three options must be selected for the Procurement Specialist to be able to see the comments and documents.

18 **Select Check Budget**. A pop up will appear verifying the request to budget check the requisition. **Select OK**. The Budget Check will show the status of Valid or Error. **If valid, select Save & Submit**.

19 A **Confirmation Page** will appear that displays the **Requisition Number, and the approval path**.



Your requisition has been submitted.

Requested For Kimberely J Helton	Number of Lines 2
Requisition Name 0000015665	Total Amount 596.90 USD
Requisition ID 0000015665	Pre-Encumbrance Balance Not Available
Business Unit NORMIN	
Status Pending	
Priority Medium	
Budget Status Valid	

View printable version
 Edit This Requisition
 Check Budget

Department Manager Approval

Requisition 0000015665:Pending
 Department Manager Approval
 Pending
 Multiple Approvers
 Req Department Managers

IT Approvals

Line 1:Initiated
 Smith-Victor 36" pro-duty copy stand w/LED light KI/REG
 IT Approvals
 Not Routed
 Multiple Approvers
 Req IT Approvers UL

Line 2:Initiated
 Vello Wired Remote f/Canon DSLR w/3-PIN III/REG
 IT Approvals
 Not Routed
 Multiple Approvers
 Req IT Approvers UL

Purchasing Approval

Requisition 0000015665:Awaiting Further Approvals

20 Once the **Purchasing Approval** status states **approved**, and there is a **Contract Specialist's name** within the **approval box**, the **requisition is assigned**. The Contract Specialist will be able to tell you the status of the contract document



22 To check the **status** of a requisition, navigate to **Manage Requisitions** within eProcurement. Select **Clear** and then enter the **Requisition number** in the **Requisition ID** field. Select **Search**, and the requisition will display.



Manage Requisitions

Search Requisitions
 To locate requisitions, edit the criteria below and click the Search button.

Business Unit: NORMN Requisition Name: _____
 Requisition ID: _____ Request State: All but Complete Budget Status: _____
 Date From: 03/20/2022 Date To: 03/20/2022 Origin: _____ Org: _____
 Requirer: 477509 Entered By: _____ Supplier: _____ PO ID: _____

Search **Clear** Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000015665	0000015665	NORMN	03/20/2022	Pending	Valid	596.90 USD [Select Action] Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

23 **Select the triangle by the requisition number.** The requisition information displays. **Select Approvals** to display the approval page.

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000015665	0000015665	NORMN	03/20/2022	Pending	Valid	596.90 USD [Select Action] Go

Requester Kimberly J Helton **Entered By** Kimberly J Helton **Priority** Medium
Pre-Encumbrance Balance Not Available

Requisition **Approvals** Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line Information Personalize | Find | First 1-2 of 2 Last

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Smith-Vector 36" pro-duty co...	Pending Approval	292.49	USD	2.00	EA	B&H PHOTO-VIDEO-PRO-AUDIO
2	Vello Wired Remote f/Canon D...	Pending Approval	5.96	USD	2.00	EA	B&H PHOTO-VIDEO-PRO-AUDIO

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report