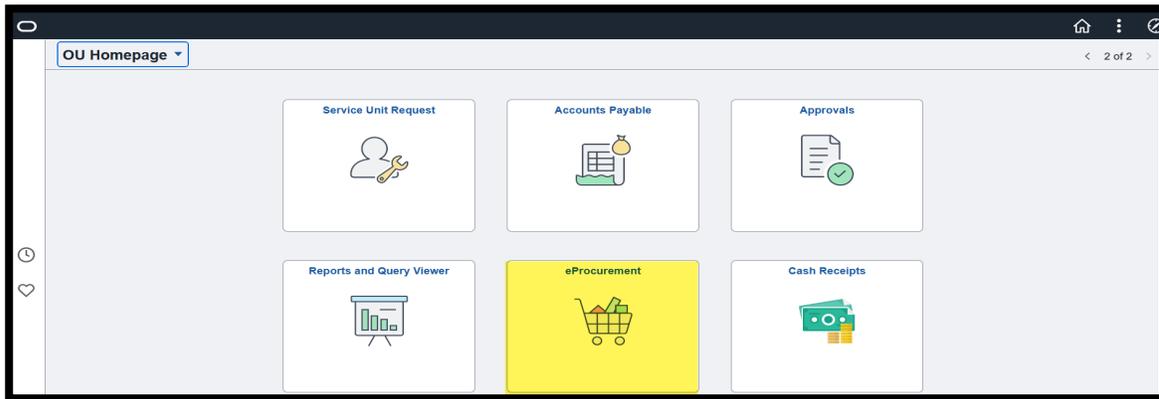
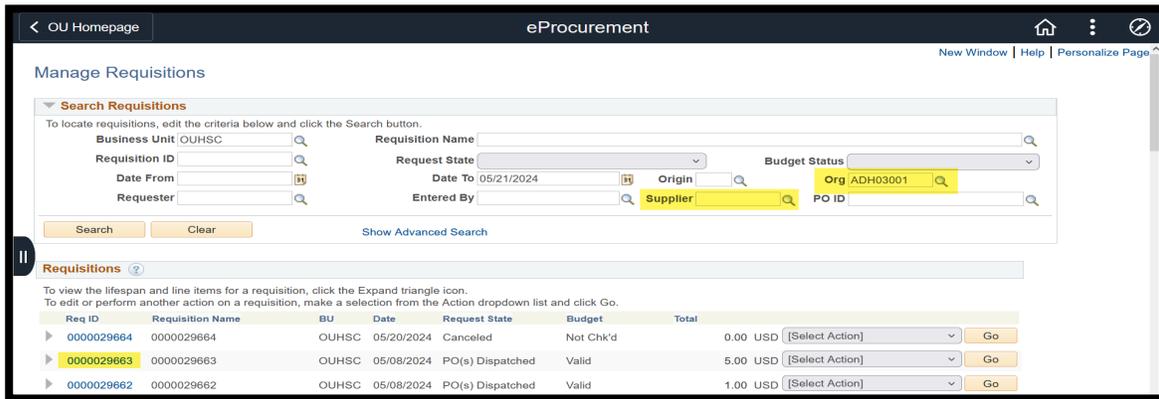




Step	Action
1	The fiscal year runs from July 1 st to June 30 th . Purchase Orders, unless on CAPTL or SPNSR funds, cannot extend for more than one year and/or past June 30 th . Therefore, most recurring services setup on Purchase Orders must be reentered and renewed every fiscal year.
2	The easiest way to renew an existing Purchase Order is to copy the current fiscal year requisition, and then make any updates as needed. Note that new fiscal year requisitions can be entered in advance of July 1 st , normally beginning sometime in March. Notifications will be sent to campus when the fiscal year renewal process can begin.
3	To copy an existing requisition, navigate to the eProcurement tile from the PeopleSoft Financial homepage and select Manage Requisitions .



4	From Manage Requisitions , locate the requisition to be copied. Note that you can narrow down your requisitions by using the filters at the top to show those with a particular Org or Supplier .
---	--



5	From the Select Action drop-down menu, choose Copy and then click Go .
---	---



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	
0000029664	0000029664	OUHSC	05/20/2024	Canceled	Not Chk'd	0.00 USD	[Select Action] Go
0000029663	0000029663	OUHSC	05/08/2024	PO(s) Dispatched	Valid	5.00 USD	[Select Action] Go

Requester: 506696, Entered By: [Name], Priority: Medium, Pre-Encumbrance Balance: Not Available

Request Lifespan: Requisition → Approvals → Inventory → Purchase Orders → Change Request → Receiving → Returns

[Action Menu: Approvals, Copy, Edit, Receive, View Print, [Select Action]]

6 From the **Checkout – Review and Submit** page, the requisition will need to be updated to reflect the agreement for the new fiscal year. Changes may include updating the requisition name, adding lines, deleting lines, or updating quantities and/or amounts.

Hint: To update **amounts** or **quantities**, click on the **name of the description** to return to the edit requisition page. More information on this process can be found in the **Change Order** job aid.

Edit Requisition - Review and Submit

Requisition Summary: Business Unit: OUHSC, Requisition Name: Underground Vaults - FY25, Requisition ID: 0000025284, Priority: Medium

Cart Summary: Total Amount 2,720.00 USD

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Destruction of Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	2,000.00	2000.00	[Details]	[Comments]	[Delete]
2	Storage Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	720.00	720.00	[Details]	[Comments]	[Delete]

Buttons: Select All / Deselect All, Add to Favorites, Add to Template(s), Delete Selected, Mass Change

7 Note that if the accounting information needs to be changed for the new fiscal year, you can easily click the **Select All/Deselect All** hyperlink and then the **Mass Change** hyperlink to update the accounting information for all requisition lines.

Cart Summary: Total Amount 4,720.00 USD

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Destruction of Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	4,000.00	4000.00	[Details]	[Comments]	[Delete]
2	Storage Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	720.00	720.00	[Details]	[Comments]	[Delete]

Buttons: Select All / Deselect All, Add to Favorites, Add to Template(s), Delete Selected, Mass Change

8 To reflect that this requisition is a renewal of an existing requisition, click the **Details** icon on the **first line** of the requisition.

Cart Summary: Total Amount 4,720.00 USD

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Destruction of Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	4,000.00	4000.00	[Details]	[Comments]	[Delete]
2	Storage Boxes	UNDERGROUND VAULTS AND STORAGE INC	1.00	Batch Lot	720.00	720.00	[Details]	[Comments]	[Delete]

Buttons: Select All / Deselect All, Add to Favorites, Add to Template(s), Delete Selected, Mass Change

9 The **Line Details** popup will appear and from here, select the **Fiscal Year Renewal** checkbox, and then scroll to the bottom of the screen and click **OK**.



Line Details

Line Details ?

No Image Line 1 Destruction of Boxes Line Status Open

Item Details ?

Merchandise Amount 4000.00 USD

Category 829100

Original Substituted Item Description

Waiting on Bid

Device Tracking

Fiscal Year Renewal

Amount Only

10 Note that the **Fiscal Year Renewal** box only needs to be checked for the first line of the requisition, even if multiple lines exist.

11 Once the renewal box is checked, the options to **budget check** or **submit** the requisition disappear. This is intentional because until the new fiscal year budget is available in PeopleSoft Financials, budget will fail for every renewal requisition. This box also indicates for Procurement which agreements have been submitted for renewal, allowing Procurement to work the new fiscal year orders in advance of the fiscal year.

Budget Checked Status **Not Checked** [Return to Requisition](#)

Save for Later Add More Items Preview Approvals Add Request Document

12 Ensure that under the **Shipping Summary** section the **ship to location**, **attention to name**, and **invoice email address** fields are all still accurate. Click the **Edit for All Lines** hyperlink if those lines need to be updated.

Shipping Summary

Edit for All Lines

Ship To Location RP865_0560

Address 865 RESEARCH PKWY
ROOM 0560
OKLAHOMA CITY, OK 73104-3609

*Invoice Email Address

Attention To Randy Requester

Comments

13 The first comment section is reserved for Procurement, but the **Add Attachments** hyperlink and the **Requester Comments** are sections where the department can add specific information on the order and/or attachments related to the order.



Purchasing Comments
Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher [Add Attachments](#)

Requester Comments
Enter approval justification for this requisition

14 Once the requisition entry information is complete, click on **Save for Later** to save your new fiscal year renewal requisition.

[Return to Requisition](#)

Budget Checked Status **Not Checked**

[Save for Later](#) [Add More Items](#) [Preview Approvals](#) [Add Request Document](#)

15 To find your renewal requisition, navigate to **Manage Requisition**, update both the default **Date From** and **Date To** fields to July 1st of the new fiscal year, and click **Search**.

Manage Requisitions

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

Business Unit Requisition Name

Requisition ID Request State Budget Status

Date From **Date To** Origin Org

Requester Entered By Supplier PO ID

[Search](#) [Clear](#) [Show Advanced Search](#)

16 Entirely new fiscal year requisitions can also be entered in advance of July 1st. Follow the same instructions to enter a requisition as you normally would, just ensure that the **Fiscal Year Renewal** box is checked under **Details** on the first requisition line. Please see the job aid on **Requisition Entry** for more information.

17 At the beginning of July, a notification to campus will be sent saying that the new fiscal year is open, and budgets are available. Once new budgets are available, the renewal requisitions will automatically be budget checked, but they must still be reviewed and submitted for processing.

18 Budget errors may exist, so it is important that each renewal requisition is reviewed to ensure that the budget is valid.

19 Navigate to **Manage Requisitions** and locate the fiscal year renewal requisitions, using the instructions noted above. Select **Edit** under the **Select Actions** dropdown menu and click **Go**.



Manage Requisitions

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

Business Unit: OUHSC | Requisition Name: | Request State: All but Complete | Budget Status: | Date From: 07/01/2024 | Date To: 07/01/2024 | Origin: | Org: | Requirer: | 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	
0000029652	0000029652	OUHSC	07/01/2024	Open	Error	9.00 USD	[Select Action] Go

Requester: | Pre-Encumbrance Balance: 0.00 USD | Entered By: | Priority: Medium

Request Lifespan: Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns

[Select Action] dropdown menu: Check Budget, Copy, Edit, View Print, [Select Action]

20 If your requisition has a budget error, this **popup message** will appear, and the budget status at the bottom of the screen will show **Error**.

Approval Justification
Enter approval justification for this requisition

Message
Current document has failed budget check. (10222,23)

OK

Check Budget | Budget Checked Status: **Error** | Return to Requisition

Save & submit | Save for Later | Add More Items | Preview Approvals | Add Request Document

21 The chartfield information will need to be updated to clear up the budget error. Once the update has been made, select the **Check Budget** icon so that the status reflects as **Valid**.

Check Budget | Budget Checked Status: **Valid** | Return to Requisition

Save & submit | Save for Later | Add More Items | Preview Approvals | Add Request Document

22 Once the new fiscal year budgets are available and the requisition has a valid budget, the ability to submit your requisition will reappear. Click the **Save & Submit** to submit the requisition for processing.

Check Budget | Budget Checked Status: **Valid** | Return to Requisition

Save & submit | Save for Later | Add More Items | Preview Approvals | Add Request Document