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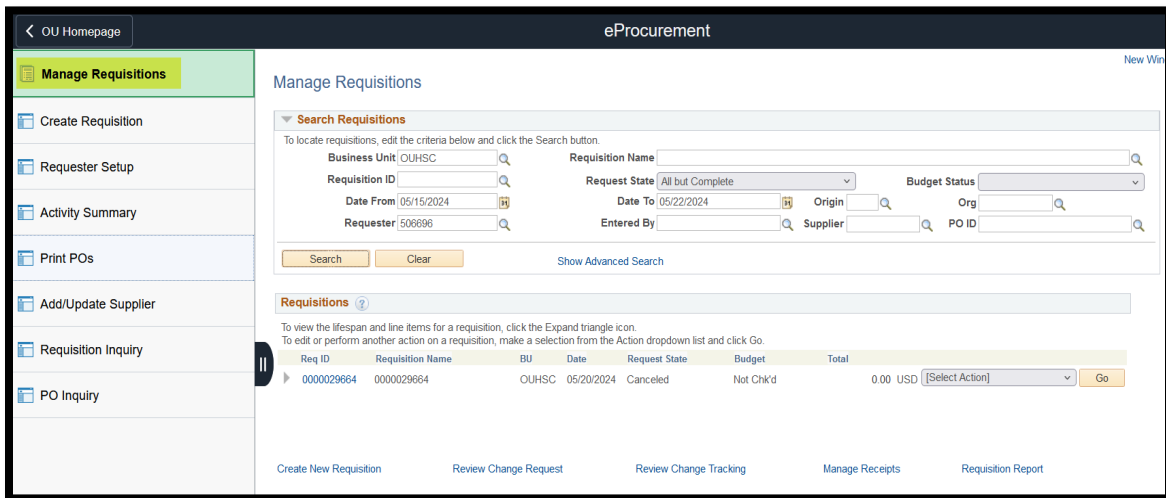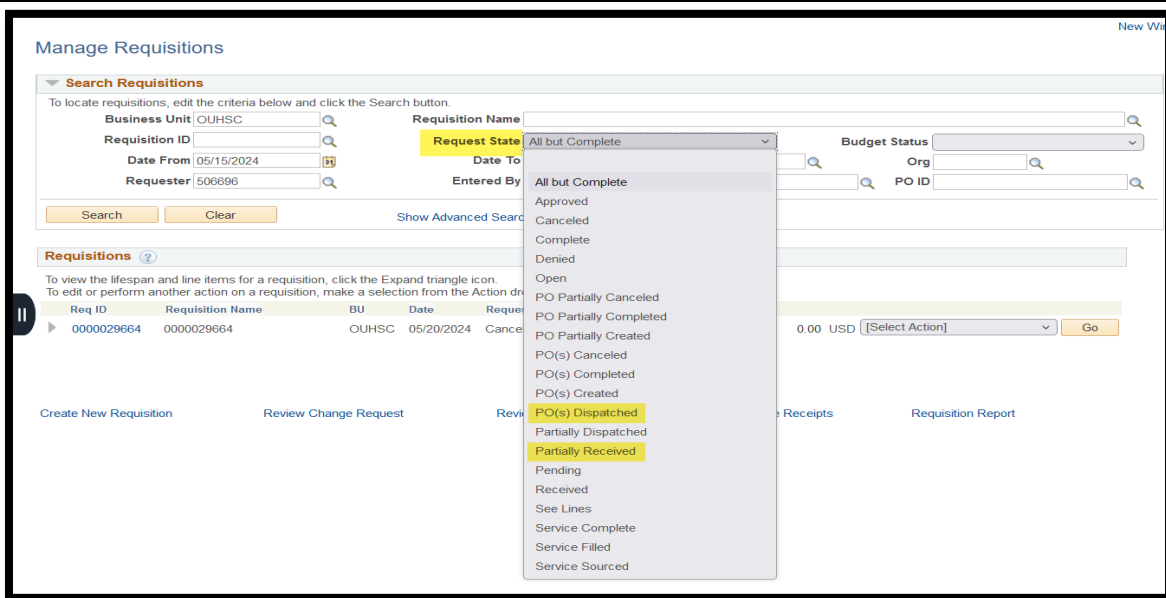
Step	Action
1	The majority of information related to Requisitions and Purchase Orders can be found from the **Manage Requisitions** screen.
2	To access the **Manage Requisitions** screen, click on the **eProcurement** tile from the **Home Screen**.
3	By default, you will be on the **Manage Requisitions** section as noted from the left side menu.

Step	Action
4	This page will default to showing all active requisitions for the user for the last seven days.
5	To see requisitions in other statuses, click on the **Request State** dropdown and review the other statuses.
6	Requisitions that have **Dispatched PO's** or that are **Partially Received** are the most common selections.

Step	Action
7	To review requisitions older than one week, delete the **Date From** date and click **Search**.

8	To review any new fiscal year requisitions that have been entered but not budget checked or submitted, change both the **Date From** and **Date To** field to **July 1st** of the next fiscal year. Example: 07/01/24 = FY25.

9	To review requisitions from others that you have been granted security access to, remove the employee ID from the **Requester** field.
10	Note that additional selection options from the **Search Requisitions** field include the ability to search by **Requisition ID**, **PO ID**, **Org**, or **Supplier ID**.

11	Once you've located your requisition, click on the **dropdown arrow** to the left of the Req ID to expand the **Request Lifespan**.

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12	This **lifespan** will allow you to access details of the requisition. Note that only the icons that are colored and hyperlinked will have activity. For example, Inventory and Returns are not something utilized in PeopleSoft, so they will remain grayed out.
13	To review the details of the requisition, click on the **Requisition** icon.

14	This will take you to the requisition summary page where you can view attachments, by clicking on the **paperclip** icon, review header comments, shipping details, and accounting lines.

Requisition Summary

Business Unit	OUHSC	Requisition Name	DG FY24 MIDCON	
Date	07/01/2023	Requisition ID	0000024391	
Request State	Partially Received	Total Amount	510.80 USD	
Requested For		Pre-Encumbrance Balance	Not Available	

Header Custom Fields

Header Comments

Comment 1: Agreement on file Period of Performance Services: 7/1/2023 - 6/30/2024 4 Recycling Bins to be emptied once every 3 weeks Invoice to: OUHSC-Financial Services Attn: Twyla Taylor 865 Research Parkway, Suite 560 Oklahoma City, OK 73104 OU Contract #R-19014-19 Replaces PO 0000017100

Expand lines to review shipping and accounting details

Requisition Lines

Line	Item Description	Source Status	Amount Only	Quantity		Price		Status	Total
1	Recycling Bins	Complete	Yes	1.0000	Batch Lot	510.80	USD	Approved	510.80

Line Comments
Comment 1: I
Line Custom Fields   PO information

Shipping Line	1	Ship To	RP865_0560	Quantity 1.0000
			865 RESEARCH PKWY	Price 510.80
			ROOM 0560	
			OKLAHOMA CITY, OK 73104-3609	
Attention To				
Due Date				

Price Adjustment
Schedule Custom Fields

▼ Accounting Lines

Distribute By   Amt   Liquidate By   Amt

Accounting Lines

Details	More Details	More Details 2	Asset Information	Budget Information	

1-1 of 1

Fund	Org	Function	Entity	PC Bus Unit	Project	Activity	Source	Purpose
EDGEN	ADH03001	00116	00000					

15	By clicking on the **Header Custom Fields,** you will also be able to see the **Contract Specialist** in Procurement that is working your order, the **date** they began to work your order, and any **comments** noting why the requisition is pending full approval.

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16	To return to the lifespan, click on the **Manage Requisitions** hyperlink at the bottom of the page.
17	To review the approvals for your requisition, click on the **Approvals** icon.
18	This page will list all of the approval steps for your requisition and the current status. Note that different approval steps may apply if your requisition is on SPNSR funds, includes IT goods/services, involves Independent Contractors, etc. If your requisition is not fully approved, the step that it is currently with will say **Pending** and until that step changes to Approved, other approvers are not eligible to work your requisition.

19	Once your requisition has been fully approved and turned into a Purchase Order, click on the **Purchase Orders** icon to review the details.
20	This page will display the **status** of your Purchase Order and the official **PO number**.

21	If you have previously entered receipts against your requisition, the **Receiving** icon will be highlighted, and you can click on the icon for more receipt details.
22	This page will show you receipts that have been entered against your requisition and their **ID**. Note that many requisitions will have multiple receipts, so you may need to look through the different pages of receipts or click **View All** to see all receipts.

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23	If a change order has been entered against your requisition, the **Change Request** icon will be hyperlinked, and you can click on the icon for more change order details.
24	Please note that in this screen, the **Requisition Approval Status** must show as **Approved**, and the **Change Request Status** must show as **Completed** to indicate that your change order has been fully processed.

25	After receipts are created, PO vouchers should also be created, although there may be a day or two delay in between receipt entry and voucher creation. To review any vouchers against your requisition, click on the **Invoice** icon.
26	Vouchers related to your requisition will be listed on this page. **Voucher Numbers** are listed, and the details can be looked up through **Regular Entry** from the **Accounts Payable tile** on the **Home Screen**. Please note that many requisitions will have multiple vouchers, so you may need to look through the different pages of vouchers or click **View All** to see all vouchers.

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27	Please note that the last icon on the lifespan is Payment, but all payment information that may be necessary to relate to a supplier can be found from the OU Info tab on the voucher. Please refer to the job aid on **Voucher Entry** for more information.
28	Aside from the **Manage Requisitions** tab, there are some queries that can provide more information on pending requisitions. To access these queries, click on the **Reports and Query Viewer** tile from the **Home Screen**.
29	Select **Query Viewer** from the left side of the screen in the **Begin With** field, type in any of the query names below, and click **Search**.

30	• **OU_BUD_REQ_PO** – Displays all requisition and PO budget details. • **OU_BUD_REQ_PO_SP** – Displays all requisition and PO budget details for SPNSR funds. • **OU_PO_LINE_ACTIVITY**. Displays all PO line distributions and payments made with a remaining amount encumbered. • **OU_PO_LINE_ACTIVITY_ALL**. Displays all PO line distributions and payments made with a remaining amount encumbered and with zero encumbered funds available. • **OU_PO_LINE_ACTIVITY_ALL_SPNSR**. Displays all grant funded PO line distributions and payments made with a remaining amount encumbered and with zero encumbered funds available.