



Step	Action
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Navigation: eProcurement – Requisition	
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- | | |
|----------|--|
| 1 | Shoppers in the OU Marketplace only have the ability to shop for items. To completely fulfill an order, they must assign their cart to a Requester who is responsible for finalizing the order in PeopleSoft.

Hint: Requesters inherit the ability to shop. For more information on the basic shopping process, please refer to the job aid for Shoppers on the OU Marketplace . |
| 2 | As a Requester, you will receive an email notification when a shopping cart has been assigned to you. |
| 3 | Before accessing a shopping cart for the first time, ensure that shipping and accounting defaults are set for all of your requisitions. Click the eProcurement tile from the Home Screen and select Requester Setup on the left side menu. |
| 4 | From this screen, type in your employee ID in the Requester field and click Search . |

Requester Setup
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Requester begins with []

Description begins with []

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

- | | |
|----------|--|
| 5 | On the Requester Setup page, several pieces of information will need to be filled in. Note that once these entries are made they will default in for all requisitions. If these defaults ever need to be updated, navigate back to this page to make changes. |
|----------|--|

Requester Setup
Requisition Defaults

ShipTo SetID: SOONR | Ship To: []

*Location SetID: SOONR | *Location: []

PO Origin SetID: SOONR | Origin: ONL

Currency: USD | Dollar

Phone: [] | Fax: []

Requisition Status: Open | Pending Approval

Override Auto Item Substitute
 Use Only Assigned Catalogs
 Consolidate with other Reqs
 Price Can Be Changed on Order
 Defaults Inventory BU

ChartFields

GL Unit	Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
[]	[]	[]	[]	[]	[]	[]	[]	[]	[]	[]

Catalog Information

Default	*SetID	*Catalog ID	Description
<input checked="" type="checkbox"/>	SOONR	OU_PUR_CATEGORIES	Purchasing Categories

Save | Return to Search | Previous in List | Next in List | Notify | Add | Update/Display

- | | |
|----------|--|
| 6 | First enter in your default Ship To location. This is where all items will ship by default. Click on the magnifying glass and enter in part of your building location the Description field and click Search . Click anywhere on the correct location line. |
|----------|--|



X
Look Up Ship To

[Help](#)

Ship To Location begins with

Description begins with 865

Search
Clear
Cancel
[Basic Lookup](#)

Search Results

View 100 1-3 of 3

ShipTo SetID	Ship To Location	Description
SOONR	RP865_0529	865 RESEARCH PARK 0529
SOONR	RP865_0530	865 RESEARCH PARK 0530
SOONR	RP865_0560	865 RESEARCH PARK 0560

7 Next enter in your **Location** by performing the same steps as before with the **Ship To** address. Note that the **Location** is where invoices will be sent by default. This may or may not be the same as your **Ship To** location.

8 Enter your **phone number** in the **Phone** field. Be sure to include your **area code** when entering the **phone number**.

Requisition Defaults

ShipTo SetID SOONR	Ship To RP865_0530	Requisition Status <input checked="" type="radio"/> Open <input type="radio"/> Pending Approval
*Location SetID SOONR	*Location RP865_0530	
PO Origin SetID SOONR	Origin ONL	
Currency USD Dollar	<input type="checkbox"/> Override Auto Item Substitute	<input checked="" type="checkbox"/> Price Can Be Changed on Order
Phone 405/271-2410	<input type="checkbox"/> Use Only Assigned Catalogs	<input type="checkbox"/> Defaults Inventory BU
Fax 	<input type="checkbox"/> Consolidate with other Reqs	

9 In the **Chartfields** section, enter in the **GL Unit, Fund, Org, Function, Entity** and depending on the Fund used, **Source** and **Purpose** may also be required. Do not enter in an **Account**.

ChartFields

1-1 of 1 | View All

Chartfields

GL Unit	Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
OUHSC		CLNOP	OUP00801	00124	00000					

10 When these fields have been entered, click **Save** at the bottom of the screen.



Requisition Defaults

ShipTo SetID: Ship To:

*Location SetID: *Location:

PO Origin SetID: Origin:

Currency: Dollar

Phone:

Fax:

Requisition Status

Open
 Pending Approval

Override Auto Item Substitute
 Use Only Assigned Catalogs
 Consolidate with other Reqs

Price Can Be Changed on Order
 Defaults Inventory BU

ChartFields

GL Unit: Account: Fund: Org: Function: Entity: Source: Purpose: PC Bus Unit: Project: Activity:



Catalog Information

Default	*SetID	*Catalog ID	Description
<input checked="" type="checkbox"/>	<input type="text" value="SOONR"/>	<input type="text" value="OU_PUR_CATEGORIES"/>	Purchasing Categories

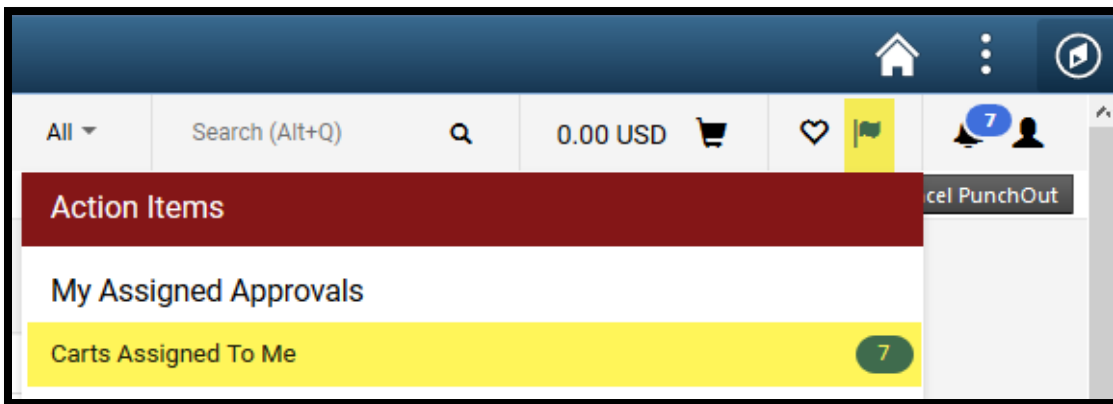
Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

11 To access the shopping cart that was assigned to you, click on **Requisition** from the left side menu or use the **NavBar** and select **eProcurement > Requisition**.

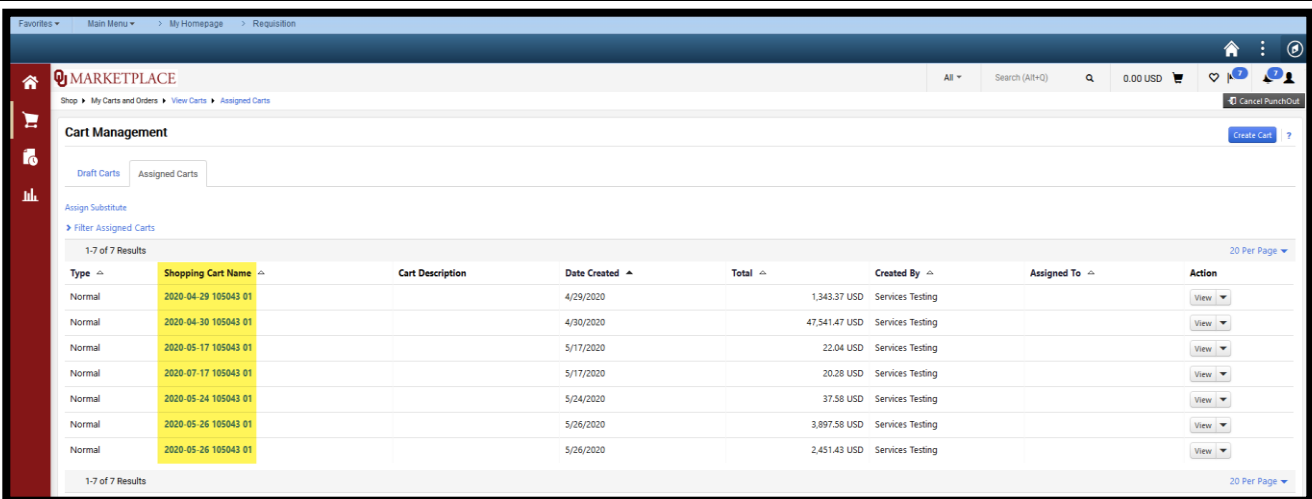
12 Click on the **OU Marketplace** hyperlink.

13 The Action Items icon  will indicate that there are pending actions you need to take. The Notifications icon  will alert you to any new notifications

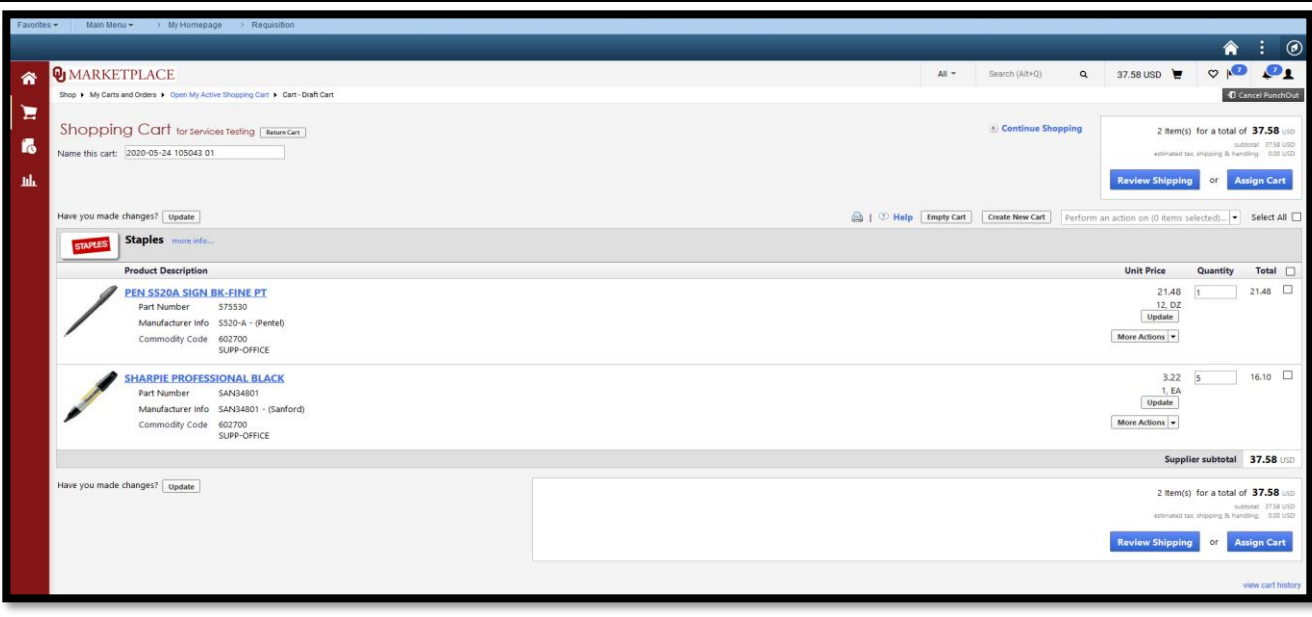
14 Click on the **Action Items** icon to see the pending Shopper carts and then click on **Carts Assigned To Me**.



15 All of the pending shopping carts will be displayed.



16 To begin reviewing a cart, click on the **Shopping Cart Name**. The details of the cart will be displayed.





17 To continue processing the cart, click on the button at the top or bottom of the cart to **Review Shipping**.

2 Item(s) for a total of **37.58** USD
 subtotal: 37.58 USD
 estimated tax, shipping & handling: 0.00 USD

Review Shipping or **Assign Cart**

In action on (0 items selected)... Select All

Unit Price	Quantity	Total
21.48 12, DZ	<input type="text" value="1"/>	21.48
<input type="button" value="Update"/>		
<input type="button" value="More Actions"/>		
3.22 1, EA	<input type="text" value="5"/>	16.10
<input type="button" value="Update"/>		
<input type="button" value="More Actions"/>		

Supplier subtotal 37.58 USD

2 Item(s) for a total of **37.58** USD
 subtotal: 37.58 USD
 estimated tax, shipping & handling: 0.00 USD

Review Shipping or **Assign Cart**

18 The shipping location selected by the Shopper will be displayed. To continue processing the cart, click on the **Send to PeopleSoft** button at the top of the screen.

MARKETPLACE

Orders > Search > Carts > Summary-Draft Cart

General Shipping Final Review

Send to PeopleSoft **Assign Cart**

Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
 Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Summary	Shipping	Supplier info	Taxes/S&H
Cart Name: 2020-05-24 105043 01 Prepared by: S35039 Prepared for: Services Testing Ship Via: Best Carrier-Best Way	Attr: Services Testing Bldg: 1100 N. LINDSAY Floor: 0142 A&E SERVICES OK, OK 73104 United States		

19 The shopping cart will be returned to PeopleSoft as a requisition.



Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: OU Health Sciences Center Requisition Name: Priority:

*Currency: Custom Fields

Cart Summary: Total Amount 37.58 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	PEN S520A SIGN BK-FINE PT		STAPLES ADVANTAGE	1.0000	Dozen	21.4800	21.48		Add	
2	SHARPE PROFESSIONAL BLACK		STAPLES ADVANTAGE	5.0000	Each	3.2200	16.10		Add	

Select All / Deselect All Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 37.58 USD

Shipping Summary

[Edit for All Lines](#) Ship To Location: 1100_0142 Ship To Confirmation

Address: 1100 N. LINDSAY ROOM 0142 OKC, OK 73104

Attention To: Attn: Services Testing

Comments

Requisition Comments and Attachments

Enter requisition comments

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

Approval Justification

Enter approval justification for this requisition

[Check Budget](#)

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

20 Please note that carts must be processed by the Requester as the Shoppers have created them or the carts should be deleted. Carts cannot be managed/updated by Requesters.

21 To delete a shopping cart, navigate to assigned carts and click the drop-down box next to the cart name. Click **Delete**.

MARKETPLACE

Shop My Carts and Orders View Carts Assigned Carts

Cart Management

[Draft Carts](#) [Assigned Carts](#)

[Assign Subtotal](#)

[Filter Assigned Carts](#)

Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	2020-04-30 105043 01		4/30/2020	47,541.47 USD	Services Testing		View View Activate Return Delete

22 The Shopper will receive a notification when the order has been sent to the supplier. Additional updates on the order status will be sent to the requester.

23 In the requisition, review the **Accounting Lines** associated with the order by expanding the arrow next to the **Requisition Lines**, then the arrow next to the **Accounting Lines** and clicking on the **Chartfields2** tab.



Cart Summary: Total Amount 37.58 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	PEN S520A SIGN BK-FINE PT		STAPLES ADVANTAGE	1.0000	Dozen	21.4800	21.48		Add	

Shipping Line 1

*Ship To Address: 1100 N. LINDSAY ROOM 0142 OKC, OK 73104

Attention To: Attn: _____

Due Date: _____

Ship Via: UPS

Freight Terms: NA

Accounting Lines

*Distribute By: Qty SpeedChart _____

Accounting Lines

Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
602700	EDGEN	ADH01001	00116	00000					

24 The default accounting information from your account will default. To update the individual accounting lines, make the accounting updates in this section.

25 To update all accounting lines, click the **Select All/Deselect All** box and then click on **Mass Change** to the far right.

Cart Summary: Total Amount 37.58 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	PEN S520A SIGN BK-FINE PT		STAPLES ADVANTAGE	1.0000	Dozen	21.4800	21.48		Add	
2	SHARPE PROFESSIONAL BLACK		STAPLES ADVANTAGE	5.0000	Each	3.2200	16.10		Add	

Select All / Deselect All

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 37.58 USD

26 A pop-up box will appear where the **chartfield spread** can be updated. Note that you will need to enter **OUHSC** or **NORMN** as the **GL Unit** along with the normal chartfield spread fields or you can click **Load Values From Defaults** to load your default information and make updates to fewer fields.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID: _____ Supplier Location: _____

Buyer: _____ Category: _____

Shipping Information

Ship To Location: _____

Due Date: _____ Attention: _____

Ship Via: _____ Freight Terms: _____

Comments: _____

Accounting Lines

SpeedChart: _____

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Dist	Percent	Location	GL Unit	Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity	Budget Date
1														

Load Values From Defaults

OK Cancel



- 27 Another pop-up will appear asking how to apply the distribution change. Leave the default of **All Distribution Lines** selected and click **OK**.

Distribution Change Options [X] Help

For the selected requisition lines that are available for sourcing, apply distribution changes to

- All Distribution Lines**
Apply changes to all existing distribution lines.
- Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

- 28 This will update the chartfield spread on all requisition lines.

- 29 Next, review the **Ship To Location**. This location defaults in from the Shopper's cart when they assigned the order. Ensure that the location selected will be able to receive the goods/services being requested

- 30 If the address should be updated, click on **Edit for All Lines** and a pop-up box will appear.

Shipping Summary [X]

Edit for All Lines

Ship To Location 1100_0142 Ship To Confirmation

Address 1100 N. LINDSAY
ROOM 0142
OKC, OK 73104

Attention To Attn:

Comments

- 31 Type in any part of the correct address in the **Ship To Location** field and click the magnifying glass to select the **exact location**. Click **OK**.



Edit Shipping For All Lines Help

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Shipping Information

Due Date
Attention

Freight Terms

Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1	Details	Asset Information	GL Unit	Account	Fund	Org	Function
Dist	Percent	Location	GL Unit	Account	Fund	Org	Function
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Load Values From Defaults](#)

32 Click the **box** next to **Ship To Confirmation** to confirm the address is correct.

Shipping Summary

[Edit for All Lines](#)

Ship To Location 1100_0142 **Ship To Confirmation**
Address 1100 N. LINDSAY
 ROOM 0142
 OKC, OK 73104

Attention To
Comments

33 Once all required information has been entered and attached, scroll to the bottom of the screen and click **Check Budget**.

34 A pop-up box will appear noting that the requisition will be placed in **Open Status** to perform budget checking. Click **OK**.

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

35 PeopleSoft will begin the budget checking process. When complete, your **Budget Checking Status** should display as **Valid**.



Check Budget Budget Checking Status: **Valid**

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

36 Click on **Save & Submit** to submit your requisition for approval.

Check Budget

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

37 The **Confirmation** screen will note that your requisition has been submitted and your **Requisition Number** will be displayed.

Favorites > Main Menu > My Homepage > Requisition

Confirmation

Your requisition has been submitted.

Requested For	Number of Lines	2
Requisition Name 2020-05-24 105043 01	Total Amount	37.58 USD
Requisition ID 0000000273	Pre-Encumbrance Balance	Not Available
Business Unit OUHSC		
Status Pending		
Priority Medium		
Budget Status Valid		

[View printable version](#)
[Edit This Requisition](#)
[Check Budget](#)

Department Manager Approval

2020-05-24 105043 01: Pending

Department Manager Approval

Pending

Multiple Approvers
Req Department Managers

[Apply Approval Changes](#)

[Create New Requisition](#)
[Manage Requisitions](#)

38 The Department (Financial) Manager will receive an email notification that requisition is pending approval. If the requisition requires any other special approvals like Grants, HR, IT, etc., they will also receive an email notification. Once fully approved, the order will be sent to the Supplier. The Supplier will electronically invoice OU and the invoice will be paid. No further action is needed.