



Step	Action
1	Purchase Orders and related Requisitions for the prior fiscal year will be automatically closed by Procurement by October 1 <sup>st</sup> , when the fiscal year is fully closed, unless on CAPTL or SPNSR funds.
2	<p>For orders that need to be closed before October to release funds/encumbrances, departments will need to initiate a request to Procurement in PeopleSoft to close the order.</p> <p><b>Note:</b> OU Marketplace orders that are fully invoiced will be closed automatically during the financial month end closing process. Departments do not need to request closures on Marketplace orders that have been fully paid.</p>
3	To request closure of an order, click on the <b>eProcurement</b> tile on the <b>Home Screen</b> and select <b>Requisition Inquiry</b> on the left side menu.
4	Note that all users with Org security to requisitions can initiate closure of an order. That includes not only requesters but financial approvers and other core approvers, like Grants/ReFS.
5	Please also note that it is the department’s responsibility to communicate with the supplier if any or all of the initial order is no longer needed. For example, if 10 pens were ordered from Staples in the OU Marketplace but only eight were received and the other two are on backorder for several weeks, the department can request closure in PeopleSoft for the remaining two quantities on the Marketplace order. However, it is the responsibility of the ordering department to contact Staples and notify them that the remaining pens should be cancelled prior to requesting closure in PeopleSoft.
6	From the <b>Find an Existing Value</b> tab, select the appropriate <b>Business Unit</b> , enter the <b>Requisition ID</b> number, and click <b>Search</b> . If you don’t have the Requisition ID number, you can just click <b>Search</b> and see all Requisitions that you have Org access to and locate the



requisition from there. Note that this screen can also be narrowed down by **Requester** (Employee ID number) or **Supplier Name**.

7 Once the requisition that needs to be closed has been located, click on the **Close Requisitions** hyperlink.

Maintain Requisitions  
Requisition

Business Unit OUHSC Status Approved  
Requisition ID 0000029663 Budget Status Valid  
Requisition Name 0000029663

▼ Header ?

\*Requester 506696  
\*Requisition Date 05/08/2024 Requester Info  
Origin ONL ONLINE  
Currency Code USD Dollar  
Accounting Date 05/08/2024

Requisition Defaults Edit Comments  
**Close Requisitions** Add Request Document  
Document Status Purchasing Comments  
Requisition Attachments

Amount Summary ?  
Total Amount 5.00 USD  
Pre-Encumbrance Balance Not Available USD

Select Lines To Display ?  
Search for Lines  
Line [ ] To [ ] Retrieve

8 A popup box will appear, populating today's date in the **Close Date** field. Click on the **Close** button, enter in a **Comment** noting why you are requesting closure of the requisition, and click **OK**.

Maintain Requisitions  
Requisition

Business Unit OUHSC Requisition Date 05/08/2024  
Requisition ID 0000029663 Requisition ID 0000029663 Status Approved

▼ Header ?

\*Requester 506696  
\*Requisition Date 05/08/2024  
Origin ONL  
Currency Code USD  
Accounting Date 05/08/2024

Requisition Defaults  
Close Requisition  
Document Status  
Requisition Attachments

Activities

Business Unit OUHSC Requisition Date 05/08/2024  
Requisition ID 0000029663 Status Approved

Requisition Activities

	Close	*Close Date	Comments
1	<input checked="" type="checkbox"/>	05/21/2024	Remaining amount paid on voucher.

OK Cancel Refresh

9 Then scroll to the bottom of the screen and click **Save**.



Requisition Defaults    Edit Comments    Total Amount    1,500.00    USD  
 Close Requisitions    Add Request Document    Pre-Encumbrance    Not Available    USD  
 Document Status    Purchasing Comments    Balance

Select Lines To Display ⓘ  
 Search for Lines  
 Line  Q To  Q

Line ⓘ

Details    Ship To/Due Date    Status    Supplier Information    Item Information    Attributes    Contract    Sourcing Controls    II▶

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		WOLFF Folder/Sealer SN: 02010754 Welltec System 3-M Plus (Annual Maint. Agreement)	1.0000	LOT	810200	1,500.00000	1,500.00	Approved

View Printable Version    View Approvals    \*Go to

                  

10 The requisition will then go into a queue for Procurement to close.

11 To check the status of your requisition, you can review the details in **Manage Requisitions** or you can review a query.

**Hint:** See the **Manage Requisition** job aid for more information on the **Manage Requisition** screen.

12 Once your requisition has been closed, the **Request State** will show **Complete**, and the **Status** will show as **Closed**.

Manage Requisitions

Search Requisitions

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

Business Unit     Requisition Name     Budget Status

Requisition ID     Request State     Date From     Date To     Origin     Org

Requester     Entered By     Supplier     PO ID

       [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
0000022939	DV 0000022939	OUHSC	07/01/2023	Complete	Valid	4,000.00 USD

Requester:     Entered By:     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	Vann FY24: Services and repa...	Closed	2000.00	USD	1.00	LOT	BOYLE SERVICES INC
2	PARTS	Closed	2000.00	USD	1.00	LOT	BOYLE SERVICES INC

[Create New Requisition](#)    [Review Change Request](#)    [Review Change Tracking](#)    [Manage Receipts](#)    [Requisition Report](#)



**13** To review the query to see the status of all requisitions that have been indicated to close, click on the **Reports and Query View** tile from the **Home Screen**.

**14** From the left side menu, click on **Query Viewer**, type in **OU\_PUR\_CLOSE\_REQS** for the query name, and click **Search**.

The screenshot shows the 'Reports and Query Viewer' interface. On the left is a navigation menu with 'Query Viewer' selected. The main area shows a search for 'OU\_PUR\_CLOSE\_REQS' with a 'Search' button. Below the search bar, the 'Search Results' section displays a table of query results.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
OU_PUR_CLOSE_REQS	Requested reqs to be closed	Public	PROCUREMENT	HTML	Excel	XML	Schedule	Lookup References	Favorite

**15** This query will show the status of any requisitions that you have Org access to, sorted by **Requisition ID**. The query will show the status, the date closure was requested, who requested the closure, and the comments that were entered. Procurement will work on manually closing the requisitions in the order that they are submitted.

The screenshot shows the results of the query 'OU\_PUR\_CLOSE\_REQS - Requested reqs to be closed'. It includes a table with columns for Row, Unit, Req ID, Initiated By, Description, Initiated On, Comments, Requisition Status, Origin, PO No., and PO Status.

Row	Unit	Req ID	Initiated By	Description	Initiated On	Comments	Requisition Status	Origin	PO No.	PO Status
5	OUHSC	0000023750	506696	Tayla Juanczell Taylor	06/06/2024	Close.	Approved	ONL	0000022565	Dispatched
6	OUHSC	0000024391	506696	Tayla Juanczell Taylor	06/06/2024	Please close, thanks.	Approved	ONL	0000022588	Dispatched
7	OUHSC	0000025264	522812	Melissa Borchardt	05/16/2024	test	Approved	ONL	0000023002	Open