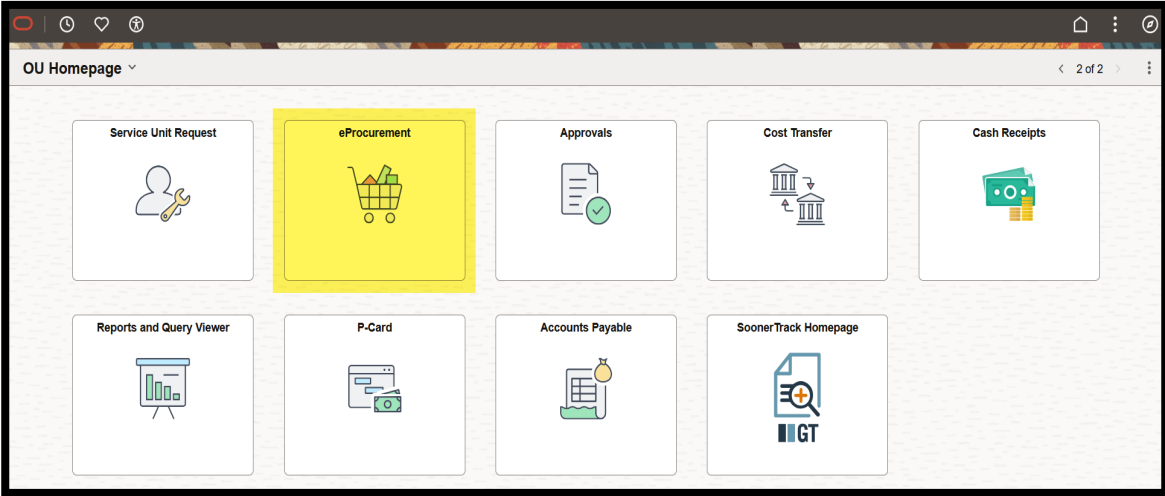
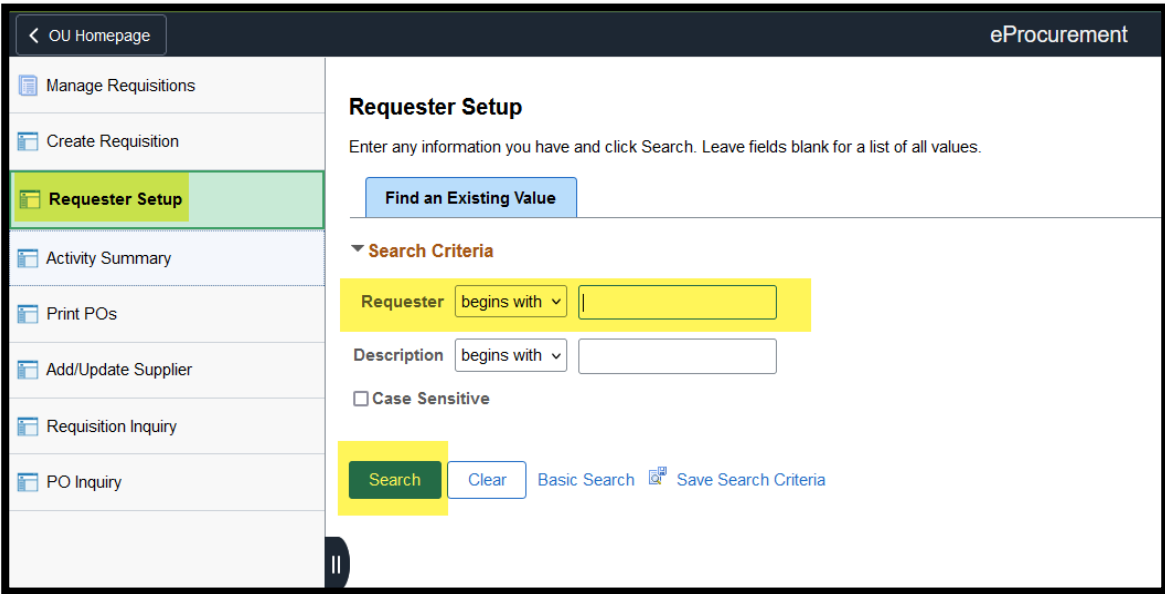




Step	Action
Navigation: eProcurement - Requisition	
1	Requisitions are requests to purchase goods or services. Per Regent's Policy, Requisitions should be used for any purchase in excess of \$5,000 or any service that may require a contract. To enter a Requisition , first ensure that defaults are set up for shipping and accounting information.
2	Login to PeopleSoft Financials and click the eProcurement tile from the Home Screen and select Requester Setup on the left side menu.
	
3	From this screen, type in your employee ID in the Requester field and click Search .
	
4	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:

*Location SetID:

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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Catalog Information

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

- 5 First, enter 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.

Look Up Ship To

[Help](#)

Ship To Location

Description

[Basic Lookup](#)

Search Results

View 100

ShipTo SetID	Ship To Location	Description
<input type="text" value="SOONR"/> <input type="button" value="Q"/>	RP865_0529	865 RESEARCH PARK 0529
SOONR	RP865_0530	865 RESEARCH PARK 0530
SOONR	RP865_0560	865 RESEARCH PARK 0560



- 6** Next, enter 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.
- 7** Enter your **phone number** in the **Phone** field. Be sure to include your **area code** when entering the **phone number**.

- 8** 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 an **Account**.

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

- 10** To begin **Requisition** entry, click on the **eProcurement** tile on the **Home Screen** and select **Create Requisition** on the left side menu.



- 11 From the **Create Requisition** page you can click on **OU Marketplace** to access punch-out catalogs or click on **Requisition** to create a regular **Requisition**.

Hint: Refer to the job aids on the OU Marketplace for more information on creating Marketplace orders.

- 12 From the **Requisition** page, enter the information about the goods or services needed.

- 13 On the **Item Description**, enter a detailed explanation of the needed good or service. If using a quote, ensure the description matches the quote's line-item details. Enter the **Price** and the **Quantity** needed for the current fiscal year. The **Total Requisition Amount** will be calculated as **Price** × **Quantity**. Use the magnifying glass to select the correct **Unit of Measure (UOM)**. Use **EA (Each)** for individual items with a defined quantity and set prices. For example, 3 widgets with a unit of measure of EA x the price of \$100 = \$300. Invoices for **Each** requisitions are received by the number of items invoiced. Use **LOT (Batch Lot)** for orders with an unknown/indefinite quantity, services where invoices amounts may vary, or when multiple invoices are expected over the life of the order. For example, 1 line for services with a unit of measure of LOT x the price of \$50,000 = \$50,000. Invoices for Lot requisitions are received by the amount invoiced.

- 14 Next, click on the magnifying glass next to **Category**. In the pop-up box that appears, change the **Search By** option to **Description** and type in part of the **description of the**



good/service. Note that the **Category Codes** are the same as the **GL Codes**. Locate the correct category and click on the **category number**. Alternatively, type in the GL code/Category code, if known.

Look Up Category X

[Help](#)

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Category 602300 Find

Categories			
Catalog	Category	Description	Find in Tree
1 OU_PUR_CATEGORIES	602300	SUPP-COMPUTER & TECH	

Browse Category Tree

Return

- 15 Under **Supplier**, click the magnifying glass next to **Supplier Name**. In the pop-up box that appears, type in part of the **supplier's name** and click **Find**. Review the information under **Search Results** and once the correct supplier has been located, click the **radio button** to the left of the **supplier** and click **Select** at the bottom of the screen. Note that all suppliers will load with their default 1099 address location. As long as the correct supplier is selected, the location on the **Requisition** does not have to match the contract or quote. The correct address for the supplier will be chosen during the receiving/invoicing process.

Hint: 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, but a Purchase Order will not be dispatched to the Best Source supplier ID.

Supplier Search X

[Help](#)

Supplier ID 9100049140 Find

Name ABC Reset

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

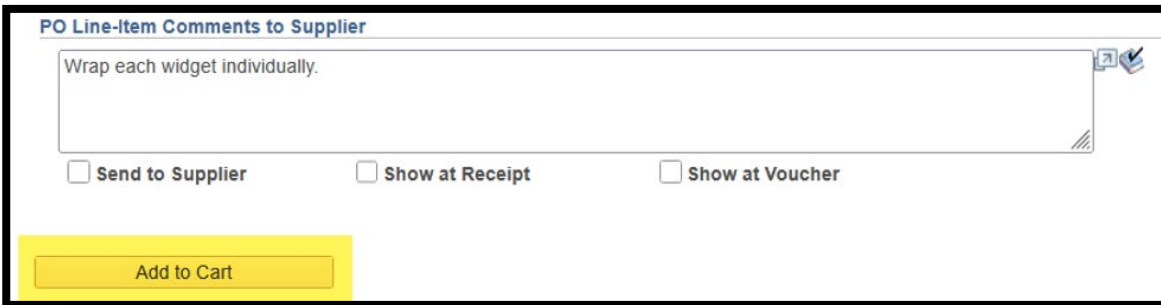
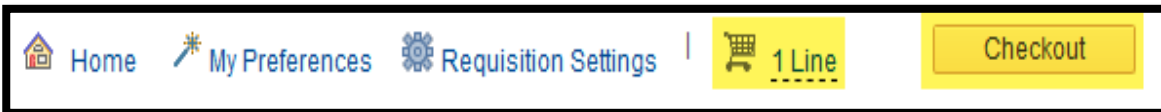
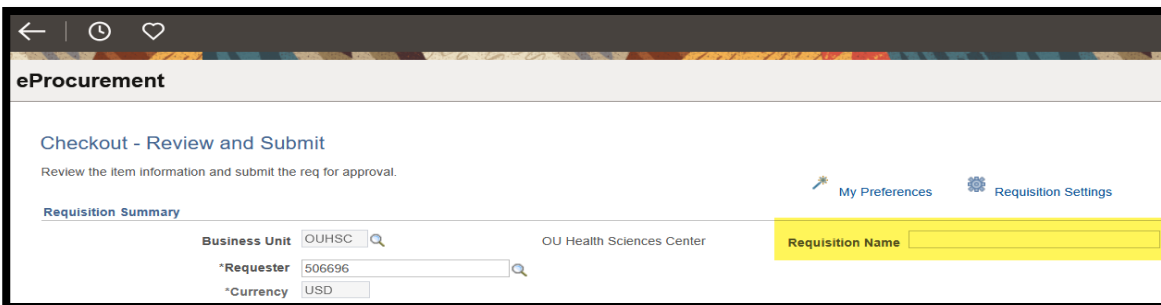
Search Results

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
<input checked="" type="radio"/>	1 9100049140	ABC	1099	1099	330 JOHN CARLYLE ST STE 210	ALEXANDRIA	VA

Select Cancel

- 16 Scroll to the bottom of the screen under **PO Line-Item Comments to the Supplier**. **ANY notes entered** in the additional information box will display as part of the Line Item Description on the formal Purchase Order that is sent to the supplier. Notes are not



	required, especially if they do not benefit the supplier in fulfilling the order. Notes that may benefit the supplier include special shipping instructions, RFP or quote numbers, contract numbers, etc. Please know that notes added in this section will automatically Send to Supplier , Show at Receipt , and Show at Voucher , but those boxes will not show as checked until the item is added to the cart.
17	When the basic details have been entered, click the Add to Cart button.
	
18	At the top of the page, you'll see the number of lines in your cart. Continue to add order lines as needed. Note that you should only have one supplier per Requisition .
19	For each unique item or service, a separate line will need to be added to the Requisition . This could include additional lines for firm shipping costs, wire transfers, administrative service fees, etc. Hint: PeopleSoft cannot process credits or negative balances on a Requisition . If discounts are noted on a quote, the credit needs to be applied to an existing line. In the end, the line needs to match what will be invoiced.
20	When the appropriate lines have been added to your Requisition , click Checkout .
	
21	In the Checkout screen, name your requisition . This can be the supplier's name, the service being received, the area that the purchase is for, etc. Make the name something that will be meaningful to look up the Requisition later.
	
22	Click the arrow next to each line of the Requisition to ensure that the Ship To and Attention To lines are correct. Note that the information will automatically default from your Requester Setup Settings .



Requisition Lines ?

Line	Description	Supplier
1	Widgets Model #ABC123	ABC

Shipping Line 1

***Ship To** RP865_0560

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

Attention To Randy Requester

- 23** Click the arrow next to **Accounting Lines** and select the **Chartfields2** tab to review the chartfield spread.

▼ Accounting Lines

*Distribute By Qty

Accounting Lines

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Account	Fund	Org	Function	Entity	Source	Purpose
602300	EDGEN	ADH03001	00116	00000		

- 24** The default accounting information from your account will default. Make any accounting updates in this section.

- 25** Under the **Accounting Lines** section, additional **Distribution Lines** can be added to the **Requisition** by clicking on the plus (+) sign.

▼ Accounting Lines

*Distribute By Qty

Accounting Lines

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
602300	EDGEN	ADH03001	00116	00000					

- 26** Next, click the **Chartfields1** tab to determine how the distribution lines should be split. Distributions will be split by percentage. Note that the percentage determined on the distribution lines will be the percentage that all invoices will be split for payment. Distributions cannot be changed per invoice.

▼ Accounting Lines

*Distribute By Qty

Accounting Lines

Chartfields1 **Chartfields2** Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Billing Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		RP865_0560	37.5000	50.0000	3,750.00	OUHSC	
2	Open		RP865_0560	37.5000	50.0000	3,750.00	OUHSC	



- 27** If there are multiple lines on the order that need to be changed from the default accounting lines, click the **Select All** box and then the **Mass Change** hyperlink.

Accounting Lines

*Distribute By: Qty

Accounting Lines

Personalize | Find | View All | First | 1-2 of 2 | Last

Line	Status	Dist Type	*Billing Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		RP865_0560	37.5000	50.0000	3,750.00	OUHSC	
2	Open		RP865_0560	37.5000	50.0000	3,750.00	OUHSC	

☒ Select All / Deselect All

Select lines to:

Total Amount: 7,500.00 USD

- 28** Enter the **accounting information** and then click **OK**.

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

Accounting Lines

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	OUHSC				

Load Values From Defaults

- 29** Ensure that under the **Shipping Summary** section the **Ship To Location** and **Attention To** name are accurate.



Shipping Summary

[Edit for All Lines](#)

Ship To Location	RP865_0560	Invoice Email Address	<input type="text"/>
Address	865 RESEARCH PKWY ROOM 0560 OKLAHOMA CITY, OK 73104-3609	Supplier Email Address	<input type="text"/>
Attention To	Randy Requester	Previous PO Number	<input type="text"/>
Comments		Event/Service Start Date	<input type="text"/>

- 30** The **Invoice Email Address** is a required field for regular **Requisitions**, but it is not required for OU Marketplace orders. This information will be displayed on the PO and is the email address that the supplier should send invoices to electronically.
- 31** **Supplier Email Address** is a required field for regular **Requisitions**, but it is not required for OU Marketplace orders. This is the supplier email address that the Purchase Order will be sent to once the PO process is complete.
- 32** **Previous PO Number** is an optional field but should be used to indicate the previous Purchase Order number. The field can also be used to list a more relevant RFP number, contract number, bid number, etc. Referring to a previous order is helpful if all relevant documentation is not attached to the new order or if similar orders need to be distinguished from others.
- 33** **Event/Service Start Date** is an optional field that can be used to indicate when an event is occurring or when a service agreement is anticipated to begin. The calendar field will be used to prioritize orders based on actual start dates rather than perceived urgency. Orders for goods, not services, should leave this field blank.

Invoice Email Address	<input type="text" value="Me@ou.edu"/>
Supplier Email Address	<input type="text" value="You@abc.com"/>
Previous PO Number	<input type="text" value="PO#0000012345"/>
Event/Service Start Date	<input type="text" value="7/1/25"/>

- 34** 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. This information will be visible to all approvers and Procurement but will not be sent to the supplier.

Purchasing Comments

Enter requisition comments

☐ Send to Supplier ☐ Show at Receipt ☐ Shown at Voucher

[Add Attachments](#)

Requester Comments

Enter approval justification for this requisition



- 35** To add attachments to the **Requisition**, click on the **Add Attachments** hyperlink under the **Purchasing Comments** section. In the pop-up window, click **Add Attachments**. Click the **Browse** button to locate the document, click **Upload** and once the file appears, click **OK**.

- 36** Additional attachments can be added by clicking **Add Attachments** again and following the previous instructions.

Attached File	User/Date Time	View	Send to Supplier
6.4.1.1_Buying_and_Sellin 1_g_Goods_and_Services_P olicy_(256_0).pdf	5066962024-05-31-13 .18.01.754	View	<input type="checkbox"/>

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



- 38** 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.

OK Cancel

- 39** 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

- 40** If a pop-up message appears indicating that there is an issue with the budget status, review your budget details to ensure that there are enough funds available to continue with orders on this chartfield spread.

Hint: Refer to the job aid on **Budget Details** for more information on how to look up this information.

Message

There is 1 distribution line whose budget status is either error or warning. (10222,29)

OK

- 41** If the Budget Checking Status displays as **Error**, you will need to resolve the budget issues before the **Requisition** can be submitted.

Message

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

OK

Budget Checking Status: **Error**

- 42** Once budget checking is valid, click on the **Save & submit** button.

Check Budget

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



- 43 The **Confirmation** screen will note that your **Requisition** has been submitted, and your **Requisition Number** will be displayed.

Confirmation

Your requisition has been submitted.

Requested For	Number of Lines 1
Requisition Name 0000000208	Total Amount 10,000.00 USD
Requisition ID 0000000208	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

Requisition 0000000208: Pending

Department Manager Approval

[Pending](#)
[Multiple Approvers](#)
[Req Department Managers](#)

- 44 The workflow screen will show you who the approvers are for your **Requisition**.
- 45 To pull up a previously submitted **Requisition**, navigate to **eProcurement > Manage Requisitions**.
- 46 Note that a Requestor only has access to their own **Requisitions**. If an active **Requisition** was established by a previous Requestor and you now need access to their **Requisitions**, request access by completing the **Requisitions Authorization form** in the **Financial Services Applications site**.
- 47 If a **Requisition** is denied by an Approver, the Requester will receive an immediate email noting the reasons for the denial. To make updates to the **Requisition**, navigate back to **Manage Requisitions** and locate the **Requisition** in **Denied Status**.

Manage Requisitions

Search Requisitions

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

Business Unit OUHSC	Requisition Name	Request State Denied	Budget Status
Requisition ID	Date From 04/01/2020	Date To 05/24/2020	Entered By
Requester	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	
0000000108	0000000108	OUHSC	04/22/2020	Denied	Not Chk'd	4,000.00 USD	[Select Action] Go

- 48 From the drop-down menu, select **Approvals** and then click the **Go** button.

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	
0000037794	0000037794	OUHSC	02/28/2025	Denied	Valid	5.00 USD	[Select Action] Go
0000037731	GeminiEvoLaser	OUHSC	02/13/2025	Denied	Valid	71,399.92 USD	Approvals Go
0000037724	Ortega Speaker Agreement	OUHSC	02/12/2025	Denied	Valid	1,000.00 USD	Cancel Go
0000037715	2025-02-12 TDASARI 01	OUHSC	02/12/2025	Denied	Valid	1,565.64 USD	Copy Go
0000037710	0000037710	OUHSC	02/11/2025	Denied	Valid	1,553.00 USD	Edit Go
							View Print Go



- 49 To view the reasons for denial, expand the **View/Hide Comments** box. The denial reasons will appear in the **Comments** field.

Approval Status

Business Unit OUHSC
 Requisition ID 0000037796
 Requisition Name 0000037796
 Requester
 Entered on 03/24/2025
 Status Denied
 Priority Medium
 Budget Status Valid

Requester's Justification
 No justification entered by requester.

[Edit Requisition](#)

> **Line Information** ?

< **Review/Edit Approvers**

Department Manager Approval

Requisition 0000037796: **Denied** [View/Hide Comments](#)

Department Manager Approval

Denied

Req Department Managers
 03/31/25 - 7:24 AM

Comments

Please adjust quantity to 100, thanks.

Purchasing Approval

Requisition 0000037796: **Denied**

Purchasing Approval

[View/Hide Comments](#)

- 50 Click the **Edit Requisition** button to return to the **Requisition**.

Approval Status

Business Unit OUHSC
 Requisition ID 0000037796
 Requisition Name 0000037796
 Requester
 Entered on 03/24/2025
 Status Denied
 Priority Medium
 Budget Status Valid

Requester's Justification
 No justification entered by requester.

[Edit Requisition](#)

> **Line Information** ?

- 51 Make the necessary changes to the **Requisition**, including adding a comment on each line of the **Requisition**. Click on **Check Budget**. Once the **Requisition** has a valid budget status, click **Save & Submit** again to resubmit the **Requisition** for approval.

Note: Each line of the denied **Requisition** will need to have **comments** entered or else the system will not recognize that the **Requisition** has been updated. If you do not add comments to each line and try to resubmit the **Requisition**, the lines without comments will remain in denied status. When you resubmit your **Requisition**, the **Status** and **Department Manager Approval** should say **Pending** to note that the **Requisition** is in workflow and awaiting approvals. If the **Status** says **See Lines**, that means that not all



lines are in the same workflow status, likely indicating that some are still **Denied** but others are **Pending**. Until all lines are updated, the **Requisition** cannot be fully processed.

Requisition Name 0000037796 Total Amount 10.00 USD
 Requisition ID 0000037796 Pre-Encumbrance Balance
 Business Unit OUHSC Not Available
Status Pending
 Budget Status Valid

View printable version Edit this Requisition Check Budget

Department Manager Approval

Requisition 0000037796: Pending [View/Hide Comments](#)

Department Manager Approval

Pending

Multiple Approvers
 Req Department Managers

52 To print a copy of the **Requisition**, click on **View Printable Version**.

Requisition Name 0000037796 Total Amount 10.00 USD
 Requisition ID 0000037796 Pre-Encumbrance Balance
 Business Unit OUHSC Not Available
 Status Pending
 Budget Status Valid

View printable version Edit this Requisition Check Budget

53 A pop-up box will appear asking if the distribution information for the **Requisition** should be printed. Click **Yes**.

Message

Do you want to print the requisition with distribution details ? (18036,11614)

54 The details of the **Requisition** will appear and can be printed from this page.



Business Unit: OUHSC		Requester: 535039		Status: Pending Approval	
Requisition: 0000000272		Requested By:		Currency: USD	
Requisition Name: 0000000272		Entered Date: 5/28/20		Requisition Total: 6,000.00	

Line: 1	Item Description: Services	Quantity: 1.0000	UOM: SVC	Price: 6000.0000	Line Total: 6,000.00
Line Status: Pending					

Ship Line: 1	Ship To: 1005_0001	Address:	Shipping Quantity: 1.0000
Attention:	Due Date:	1108 NEWTON DRIVE	Shipping Total: 6,000.00
Ship Via: UPS	Freight Terms: NA	ROOM 0001	
		NORMAN OK 73069	
		United States	

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	1005_0001	1.0000	100.00	6,000.00	OUHSC	829100

Dept	Fund	Program	Class
ADH01001	EDGEN	00116	00000

Open QTY	Open Amt
0.0000	6000.000

GL Base Amount	Currency	Sequence	Capitalize
6,000.00	USD	0	N

- 55** If you have submitted a **Requisition** for approval and the **Requisition** needs to be cancelled, you can cancel the **Requisition** as long as it has not been fully approved. If a line or lines of a Purchase Order need to be cancelled, that process is completed by processing a **Change Order**. Please see the job aid on **Change Orders** for more information.
- 56** Locate the **Requisition** that needs to be cancelled in **Manage Requisitions** and click the arrow to the left of the **Requisition ID** number. Review the **Request State** at the top or the **Status** column in the request lifespan.

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	
0000054240	FY25 Chiller Maintenance...	NORMN	07/03/2024	Pending	Valid	13,465.51 USD	[Select Action] Go

Requester Pamela E Neron
Pre-Encumbrance Balance Not Available

Entered By

Priority Medium

Request Lifespan:

Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Chiller and Overhead cooling...	Pending Approval	13465.51	USD	1.00	LOT	OKLAHOMA CHILLER CORPORATION

- 57** As long as the **Requisition** is in a **Pending** status, it can be cancelled.
- 58** Under the **Select Action** drop-down menu for the **Requisition**, select **Cancel** and click the **Go** button.

59 The next screen will display the **Requisition Details**. Click the **Cancel Requisition** button.

60	The Requisition will then display as Cancelled .
----	--

Page 16 of 16