<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigation: eProcurement – Requisition</strong></td>
<td></td>
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</tbody>
</table>
| 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.

<table>
<thead>
<tr>
<th>Find an Existing Value</th>
<th>Add a New Value</th>
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</table>

**Search Criteria**

<table>
<thead>
<tr>
<th><strong>Requester</strong> begins with</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong> begins with</td>
<td></td>
</tr>
<tr>
<td><strong>Case Sensitive</strong></td>
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</table>

**Search**  
**Clear**  
Basic Search  
Save Search Criteria

**Requester Setup**

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.

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.
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.

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.

10 When these fields have been entered, click Save at the bottom of the screen.
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.
All of the pending shopping carts will be displayed.

To begin reviewing a cart, click on the **Shopping Cart Name**. The details of the cart will be displayed.
To continue processing the cart, click on the button at the top or bottom of the cart to **Review Shipping**.

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.

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

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

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.

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

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

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

This will update the chartfield spread on all requisition lines.

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.

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

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

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**.

35 PeopleSoft will begin the budget checking process. When complete, your **Budget Checking Status** should display as **Valid**.
36 Click on **Save & Submit** to submit your requisition for approval.

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

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.