

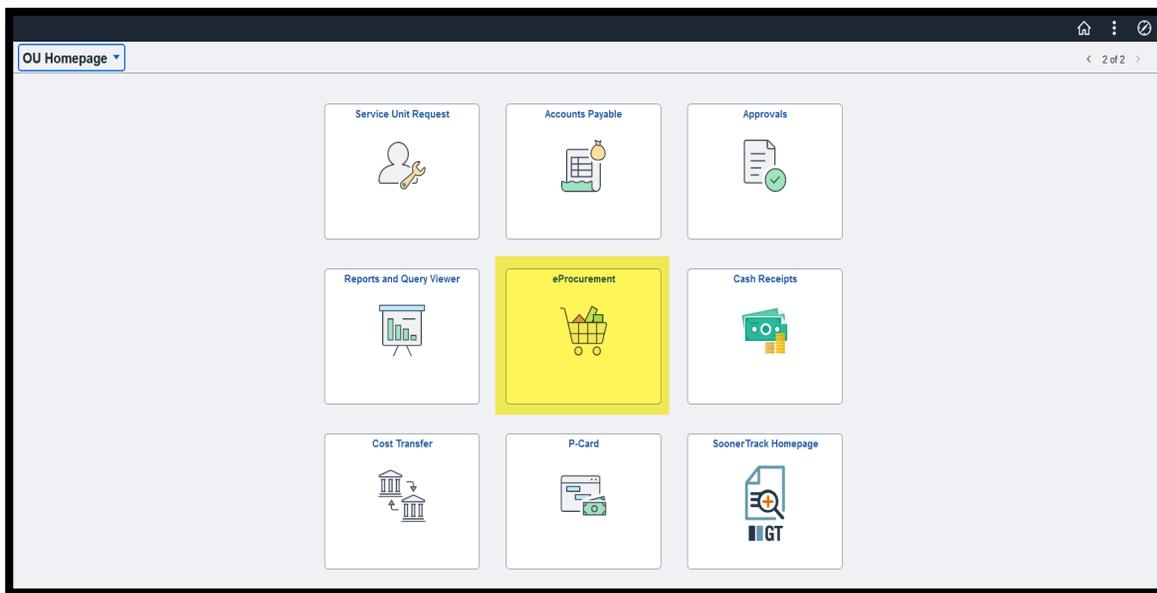


Step	Action
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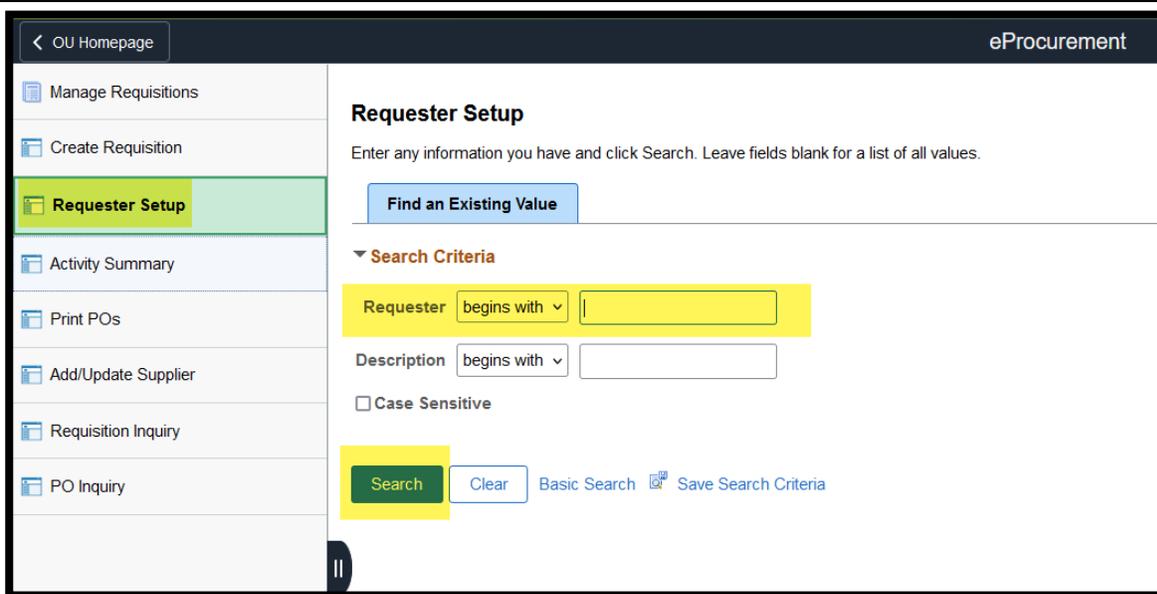
Navigation: eProcurement - Requisition	
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1	Requisitions are requests to purchase goods or services. Per Regent's Policy, Requisitions should be used for any purchase in excess of \$5,000 or any service that may require a contract. To enter a Requisition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

Chartfields 1-1 of 1 | View All

GL Unit	Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
<input type="text"/> <input type="button" value="Q"/>										

Catalog Information

1-1 of 1 | View All

Default	*SetID	*Catalog ID	Description
<input checked="" type="checkbox"/>	SOONR <input type="button" value="Q"/>	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 begins with

Description begins with 865

[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



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**.

Requisition Defaults

Ship To SetID: SOONR
 *Location SetID: SOONR
 PO Origin SetID: SOONR
 Currency: USD Dollar
 Phone: 405/271-2410
 Fax: []

Ship To: RP865_0530
 *Location: RP865_0530
 Origin: ONL

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

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**.

ChartFields

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

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

Requisition Defaults

Ship To SetID: SOONR
 *Location SetID: SOONR
 PO Origin SetID: SOONR
 Currency: USD Dollar
 Phone: 405/271-2410
 Fax: []

Ship To: RP865_0530
 *Location: RP865_0530
 Origin: ONL

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
OUHSC	[]	CLNOP	OUP00801	00124	00000	[]	[]	[]	[]	[]

Catalog Information

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

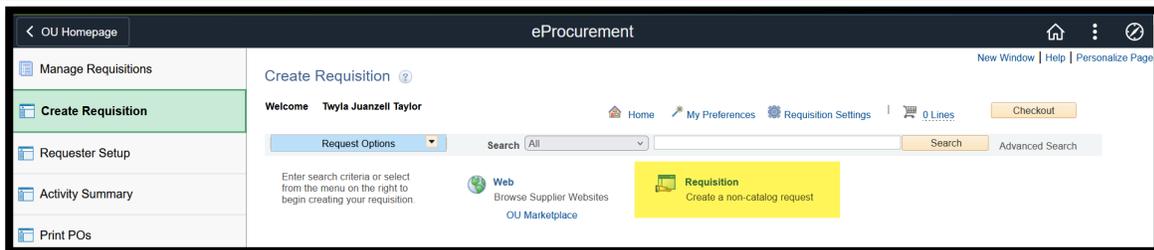
Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, Update/Display

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



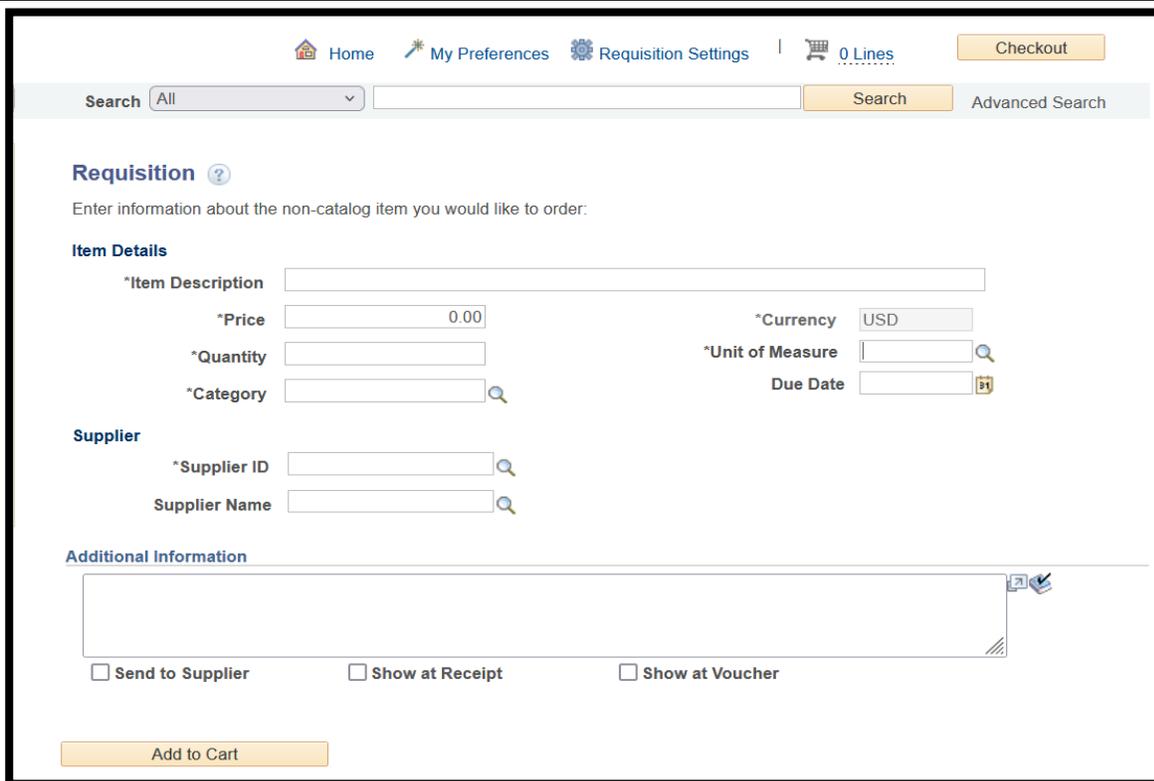
11 From the **Create Requisition** page you can click on **OU Marketplace** to access punch-out catalogs or click on **Requisition** to create a regular **Requisition**.

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 Under **Item Description**, enter a **detailed description** of the good/service needed in this field. If working off a quote, the item or service should match the quote line-item information. Enter in the **Price** for the good or service and the total **Quantity** needed for the current fiscal year. Note that the **Price** times the **Quantity** will create the total **Requisition** amount. Use the magnifying glass to pull up the correct **Unit of Measure**. **EA** is used for **Each** and **LOT** is used for **Batch Lot**. If an order has a defined quantity of items and set incremental prices, this is considered a 'definite quantity' and **EA** should be used along with the correct quantity of items. If the order has an 'indefinite quantity', meaning that the quantity is unknown or the order is for services where final prices may vary or multiple invoices may be received for the services, **LOT** should be used along with the quantity of one.





- 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**.

Look Up Category

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

Search Categories

Search By: Description | svc | Find

Categories	Personalize	Find	View All	First	1-18 of 18	Last
Catalog	Category	Description	Find in Tree			
1 OU_PUR_CATEGORIES	821580	ATH-SVC-OFFICIALS				
2 OU_PUR_CATEGORIES	821506	SVC-ACCOUNT/AUDIT/BILL/TAX				
3 OU_PUR_CATEGORIES	827210	SVC-ADMIN FEE STUDENT HEALTH				
4 OU_PUR_CATEGORIES	821530	SVC-ARCHITECT & ENGINEER				
5 OU_PUR_CATEGORIES	830360	SVC-EMPLOYEE PLACEMENT/TEMP				
6 OU_PUR_CATEGORIES	830400	SVC-ENTERTAIN/PERFORM/SPEAKERS				
7 OU_PUR_CATEGORIES	831000	SVC-GENERAL NON-PROFESSIONAL				
8 OU_PUR_CATEGORIES	830200	SVC-HONORARIUM				
9 OU_PUR_CATEGORIES	821560	SVC-JANITORIAL SERVICES				
10 OU_PUR_CATEGORIES	829200	SVC-LAB ANIMALS REDERIVATION				
11 OU_PUR_CATEGORIES	821570	SVC-LANDSCAPING				

- 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.

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

Supplier ID:

Name: amerisourc | Find | Reset

Short Supplier Name:

Alternate Supp Name:

City:

Country: | State:

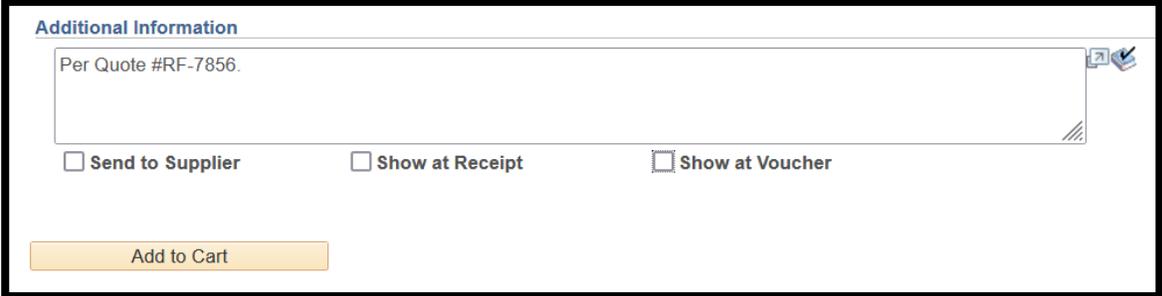
Postal Code:

Search Results

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
<input type="radio"/> 1 9100011975	AMERISOURCEBERGEN DRUG CORPORATION	1099	1099	PO BOX 959	VALLEY FORGE	PA

Select | Cancel



16	<p>Scroll to the bottom of the screen under Additional Information. 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 <u>not</u> 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.</p>
17	<p>When the basic details have been entered, click the Add to Cart button.</p>
	
18	<p>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.</p>
19	<p>Note that for each unique item or service, a separate line will need to be added to the Requisition. This could include additional lines for shipping, wire transfers, administrative service fees, etc.</p> <p>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.</p>
20	<p>When the appropriate lines have been added to your Requisition, click Checkout.</p>
	
21	<p>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, or the Marketplace Contract Number. Make it something that will be meaningful to look up the Requisition later.</p>



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**.

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

24 The default accounting information from your account will default. To update the individual accounting lines, make the 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 SpeedChart

Accounting Lines Personalize | Find | View All | First 1 of 1 Last

Account	Fund	Org	Function	Entity	Source	Purpose	PC Bus Unit	Project	Activity
821530	EDGEN	ADH01001	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: Amt SpeedChart

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

Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Line	Status	*Billing Location	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open	RP865_0560	50.0000	50.00	OUHSC	
2	Open	RP865_0560	50.0000	50.00	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.

Cart Summary: Total Amount 150.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Pharmaceuticals	AMERISOURCEBERGE N DRUG CORPORATION	1.00	Batch Lot	100.00	100.00		Add	
Shipping Line 1		*Ship To: RP865_0560	Add Shipto Comments	Quantity: 1.0000	Price: 100.0000				
		Address: 865 RESEARCH PKWY ROOM 0560 OKLAHOMA CITY, OK 73104-3609					Price Adjustment	Pegging Inquiry	Pegging Workbench
		Attention To: Ted Tester					Custom Fields		
		Due Date:							
Accounting Lines									
2	Gloves	AMERISOURCEBERGE N DRUG CORPORATION	1.00	Each	50.00	50.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected **Mass Change**

Total Amount 150.00 USD

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



Edit Lines/Shipping/Accounting for Selected Lines

Supplier ID Supplier Location
 Buyer Category

Shipping Information

Ship To Location
 Due Date Attention
 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
1			OUHSC				

Load Values From Defaults

OK Cancel

29 Ensure that under the **Shipping Summary** section the **ship to location**, **attention to name**, and **invoice email address** fields are all still accurate. Please note that the **Invoice Email Address** field is required. This information will be displayed on the PO and is the email address that the supplier should send invoices to electronically.

Shipping Summary

[Edit for All Lines](#)

Ship To Location RP865_0560
 Address 865 RESEARCH PKWY
 ROOM 0560
 OKLAHOMA CITY, OK 73104-3609
 *Invoice Email Address

Attention To Randy Requester
 Comments

30 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.

Purchasing Comments

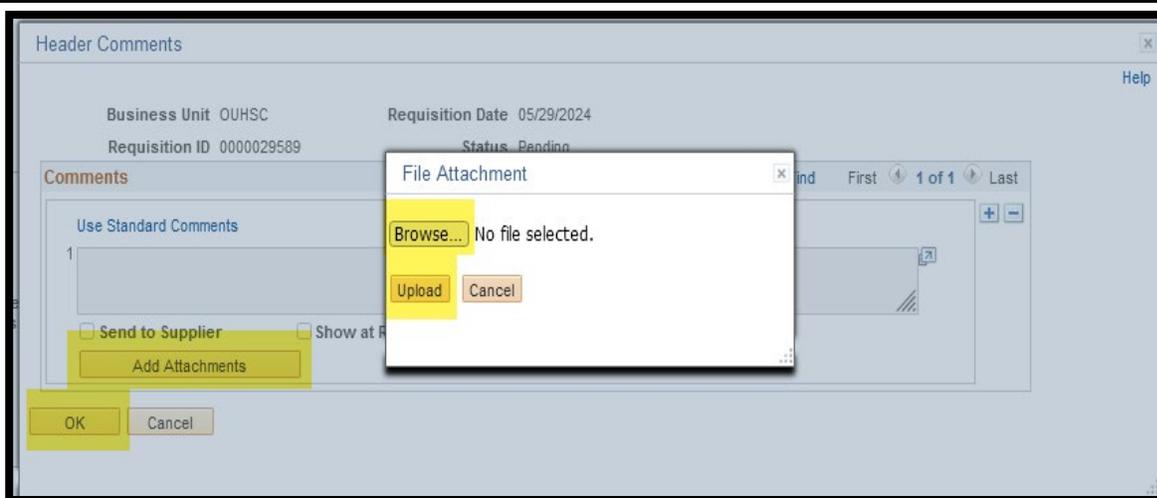
Enter requisition comments

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

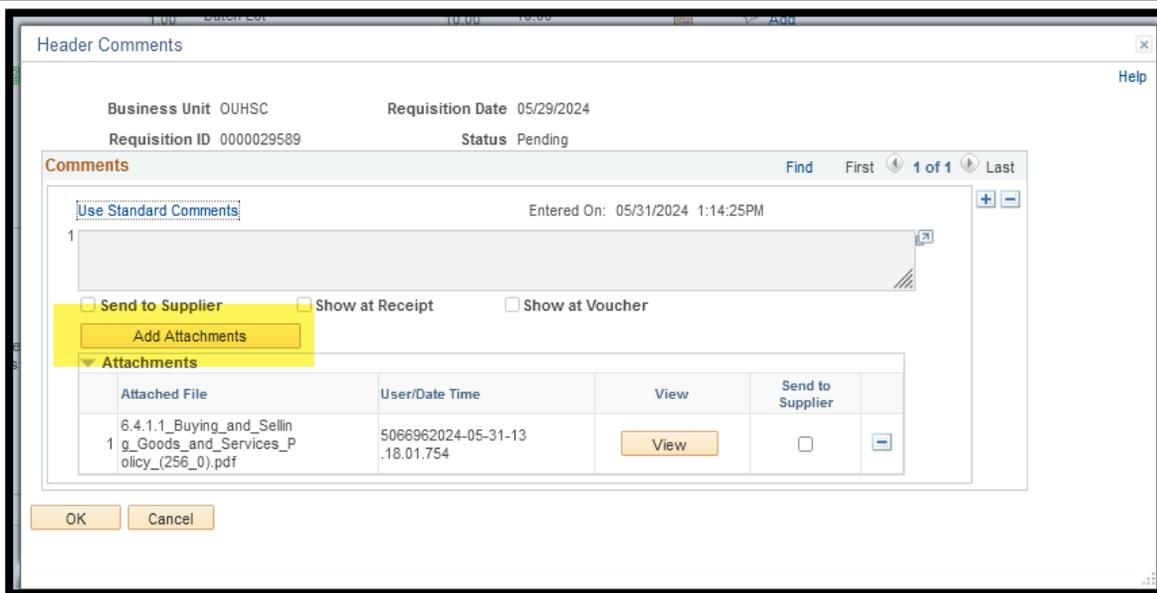
Requester Comments

Enter approval justification for this requisition

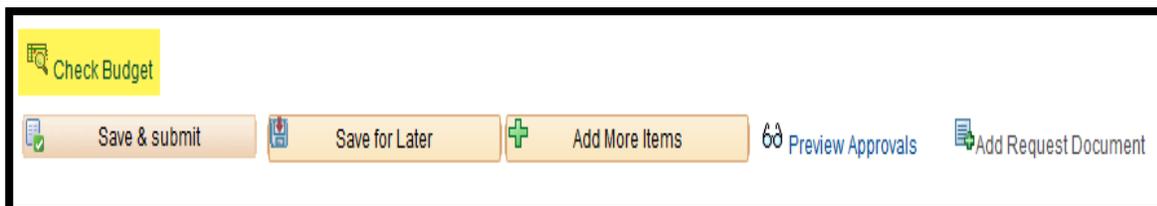
31 To add attachments to the **Requisition**, click on the **Add Attachments** hyperlink under the **Purchasing Comments** section. In the pop-up window, click **Add Attachments**. Click the **Browse** button to locate the document, click **Upload** and once the file appears, click **OK**.



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



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.

OK Cancel

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 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

37 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**

38 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

39 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

- 40 | The workflow screen will show you who the approvers are for your **Requisition**.
- 41 | To pull up a previously submitted **Requisition**, navigate to **eProcurement > Manage Requisitions**.
- 42 | 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**, your Financial Approver should submit an updated security form to request access to another Requester's **Requisitions**.
- 43 | 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 <input type="text" value="OUHSC"/>	Requisition Name <input type="text"/>	Budget Status <input type="text"/>
Requisition ID <input type="text"/>	Request State <input type="text" value="Denied"/>	
Date From <input type="text" value="04/01/2020"/>	Date To <input type="text" value="05/24/2020"/>	
Requester <input type="text"/>	Entered By <input type="text"/>	PO ID <input type="text"/>

 [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

- 44 | From the drop-down menu, select **Edit** and then click the **Go** button.

Manage Requisitions

Search Requisitions

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

Business Unit <input type="text" value="OUHSC"/>	Requisition Name <input type="text"/>	Budget Status <input type="text"/>
Requisition ID <input type="text"/>	Request State <input type="text" value="Denied"/>	
Date From <input type="text" value="04/01/2020"/>	Date To <input type="text" value="05/24/2020"/>	
Requester <input type="text"/>	Entered By <input type="text"/>	PO ID <input type="text"/>

 [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
▶ 0000000107	2020-04-22 scot0150 05	OUHSC	04/22/2020	Denied	Not Chk'd	12,129.80 USD	Approvals Go
▶ 0000000106	0000000106	OUHSC	04/22/2020	Denied	Not Chk'd	6,000.00 USD	Cancel Go
▶ 0000000105	2020-04-22 scot0150 04	OUHSC	04/22/2020	Denied	Not Chk'd	375.32 USD	Check Budget Go
▶ 0000000104	0000000104	OUHSC	04/22/2020	Denied	Not Chk'd	6,000.00 USD	Copy Go
▶ 0000000103	0000000103	OUHSC	04/22/2020	Denied	Not Chk'd	5,550.00 USD	Edit Go
							View Print Go
							[Select Action] Go



45 To view the reasons for denial, click on **Preview Approvals** and in the pop-up box that appears, expand the **View/Hide Comments** box. The denial reasons will appear in the **Comments** field.

46 Make the necessary changes to the **Requisition**. Please note that 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.

47 Click on **Check Budget**. Once the **Requisition** has a valid budget status, click **Save & Submit** again to resubmit the **Requisition** for approval.

48 Once the **Confirmation** screen appears, click on **View Printable Version** to print a copy of the **Requisition**.

49 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)

50 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: [Redacted]	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: [Redacted]	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	6000.0000

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

51 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.

52 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 Maintenanc...	NORMN	07/03/2024	Pending	Valid	13,465.51 USD

Requester: Pamela E Neron
Pre-Encumbrance Balance: Not Available
Entered By: [Redacted] Priority: Medium

Requisition | Approvals | Inventory | Purchase Orders | Change Request | Receiving | Returns | Invoice | Payment

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

54 As long as the **Requisition** is in a **Pending** status, it can be cancelled.



55 Under the **Select Action** drop-down menu for the **Requisition**, select **Cancel** and click the **Go** button.

The screenshot shows a table of requisitions. The first row is expanded to show details for Requisition ID 0000054240. The 'Request State' is 'Pending' and the 'Budget' is 'Valid'. A dropdown menu is open over the 'Request State' column, with 'Cancel' highlighted. Below the table is a process flow diagram with steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, and Returns. The 'Approvals' step is currently active.

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

The screenshot displays the 'Requisition Details for:' page. It shows the following information:

- Business Unit: NORMN
- Date: 07/03/2024
- Requisition ID: 0000054240
- Status: Pending
- Requisition Name: FY25 Chiller Maintenance for 4
- Total: 13,465.51 USD

Below this is a 'Line Details' table:

Line	Item Description	Status	Price	Qty	Total
1	Chiller and Overhead cooling maintenance at...	Pending Approval	13,465.51000	1.0000	13465.51

A yellow button labeled 'Cancel Requisition' is highlighted at the bottom right of the details section.

57 The **Requisition** will then display as **Cancelled**.

The screenshot shows the 'Manage Requisitions' page. At the top, there is a search section with various filters. Below that, a table lists requisitions. The first row is expanded, showing the 'Request State' as 'Cancelled'.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000054240	FY25 Chiller Maintenanc...	NORMN	07/03/2024	Cancelled	Not Chk'd	0.00 USD

At the bottom of the page, there are several navigation links: 'Create New Requisition', 'Review Change Request', 'Review Change Tracking', 'Manage Receipts', and 'Requisition Report'.