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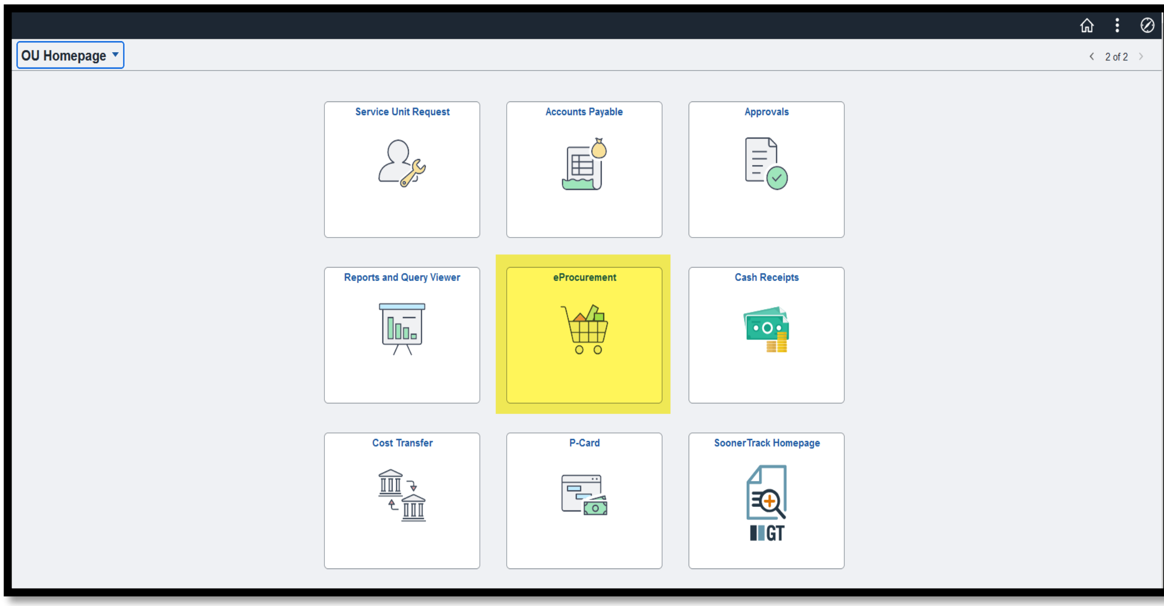
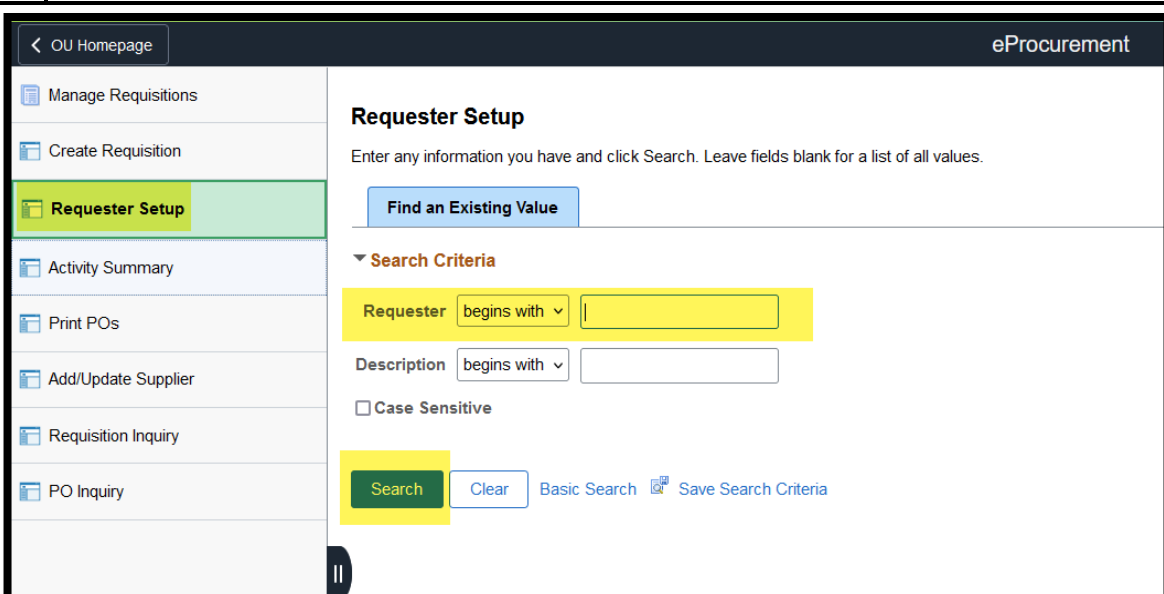
Step	Action
Navigation: eProcurement - Requisition	
1	**Requisitions** are requests to purchase goods or services. Per Regent's Policy, **Requisitions** should be used for any purchase in excess of $5,000 or any service that may require a contract. To enter a **Requisition**, first ensure that defaults 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.



Step	Action
3	From this screen, type in your **employee ID** in the **Requester** field and click **Search**.



Step	Action
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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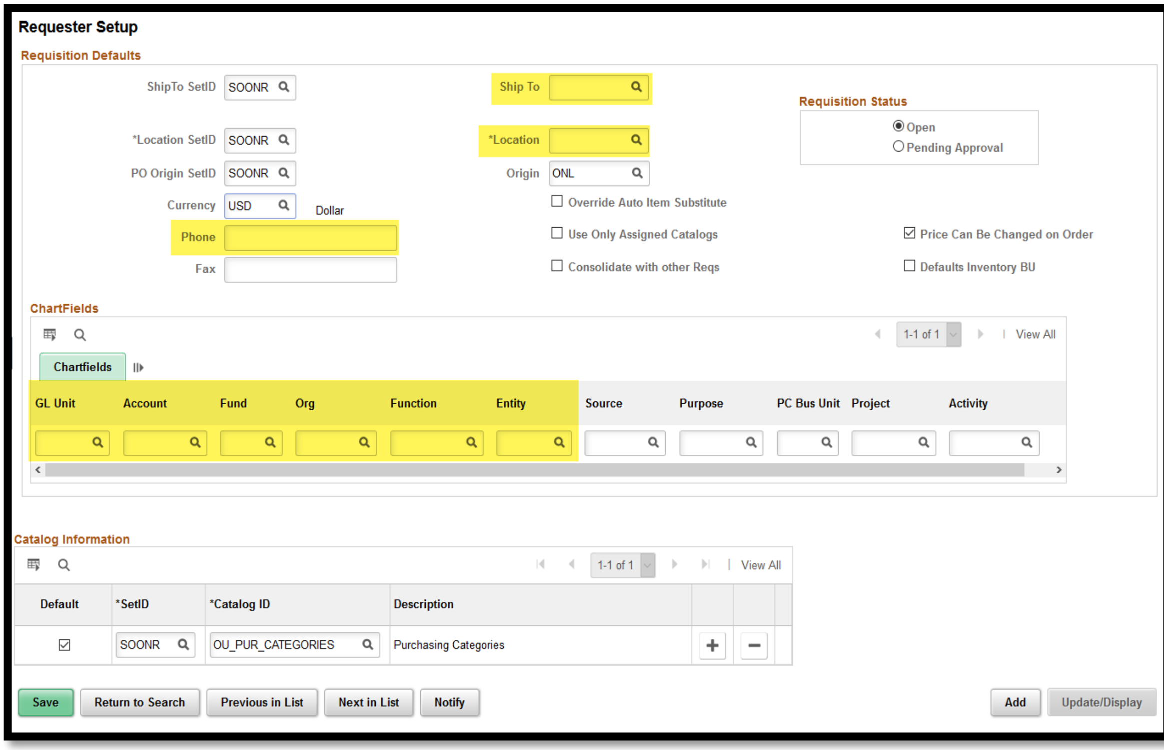
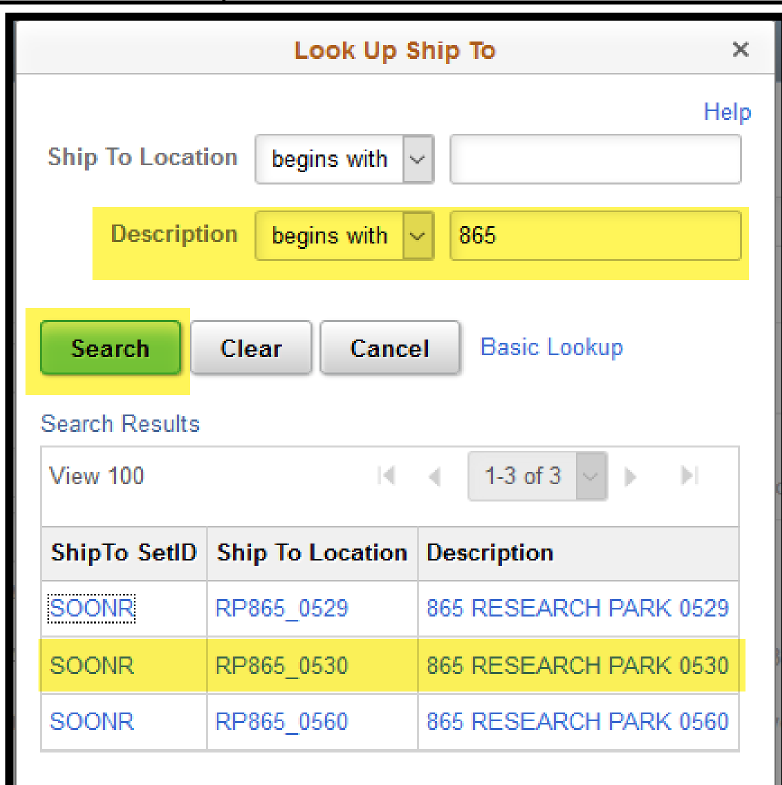


5 First, enter your default **Ship To** location. This is where all items will ship by default. Click on the magnifying glass and enter in part of your **building location** the **Description** field and click **Search**. Click anywhere on the correct **location** line.



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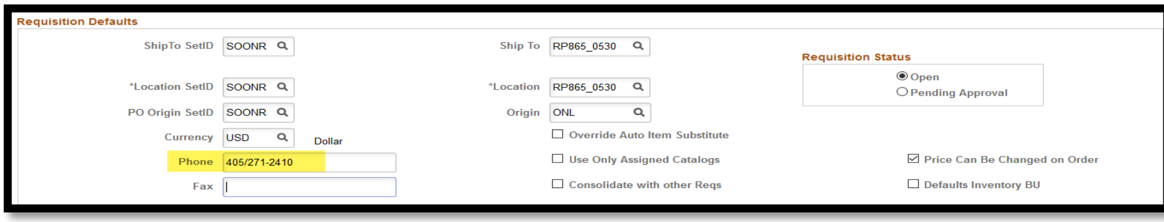
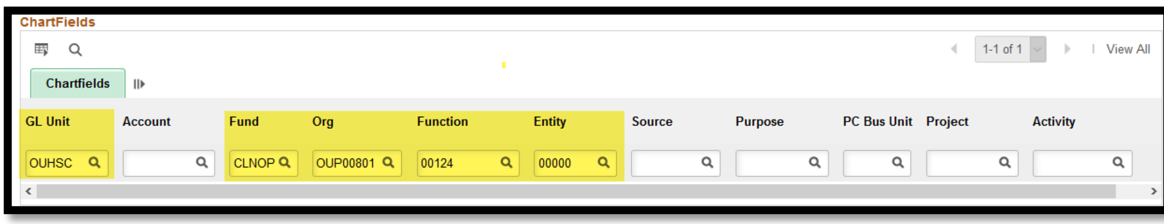
6 Next, enter your **Location** by performing the same steps as before with the **Ship To** address. Note that the **Location** is where invoices will be sent by default. This may or may not be the same as your **Ship To** location.

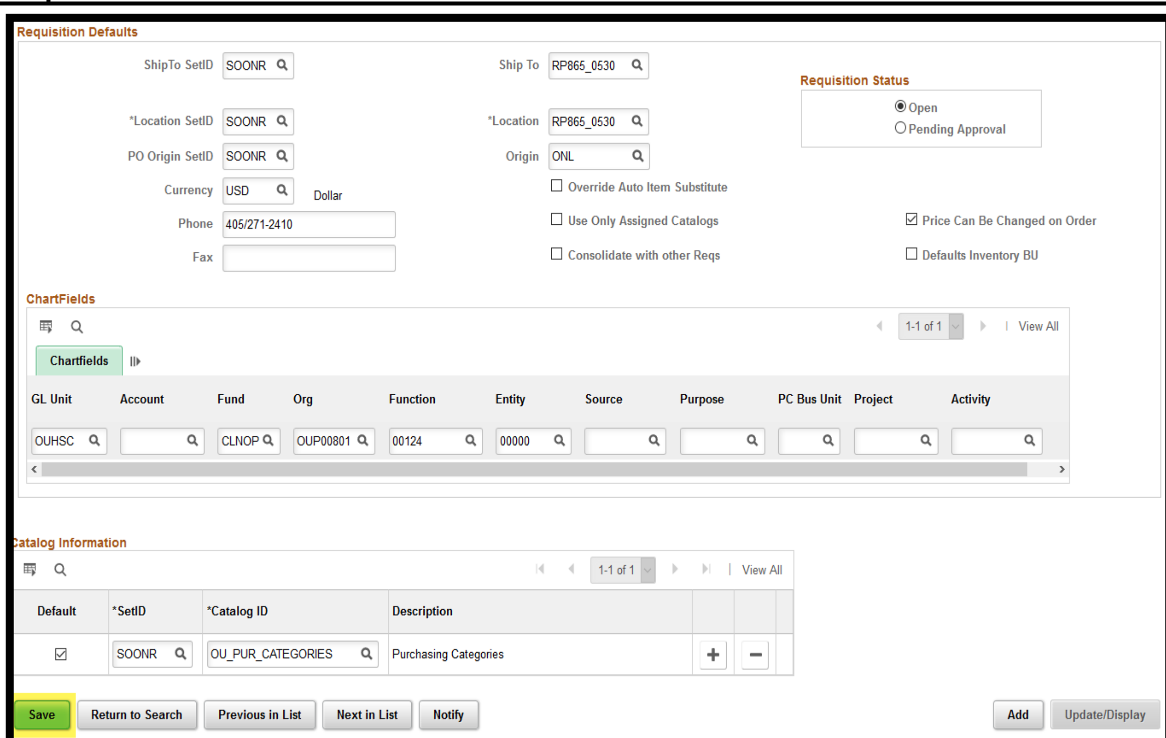
7 Enter your **phone number** in the **Phone** field. Be sure to include your **area code** when entering the **phone number**.



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.

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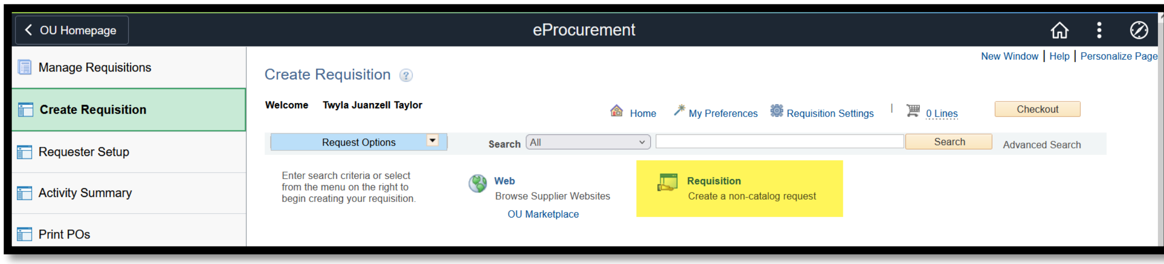
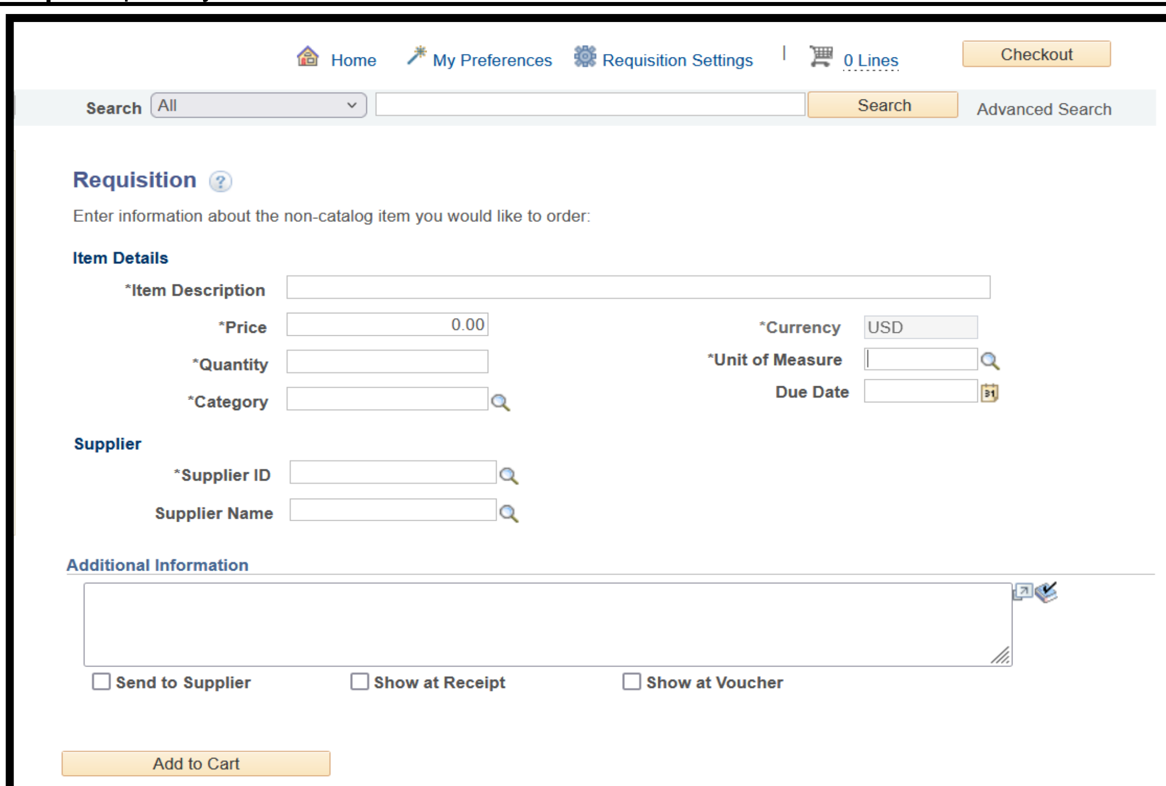
11	From the **Create Requisition** page you can click on **OU Marketplace** to access punch-out catalogs or click on **Requisition** to create a regular **Requisition**. Hint: Refer to the job aids on the OU Marketplace for more information on creating Marketplace orders.
	
12	From the **Requisition** 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.
	

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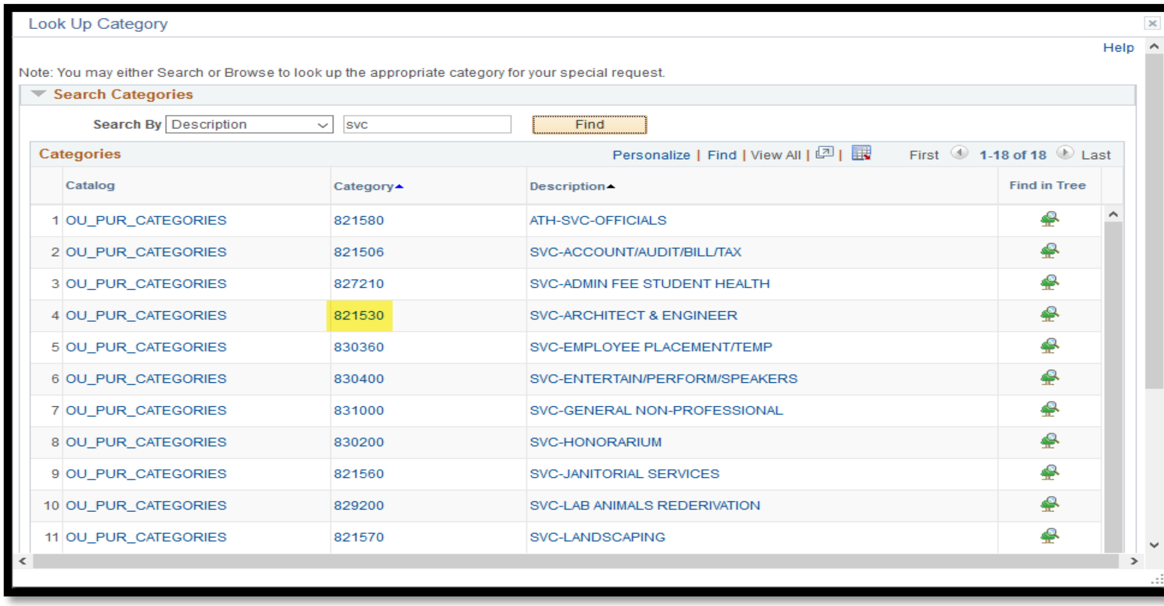
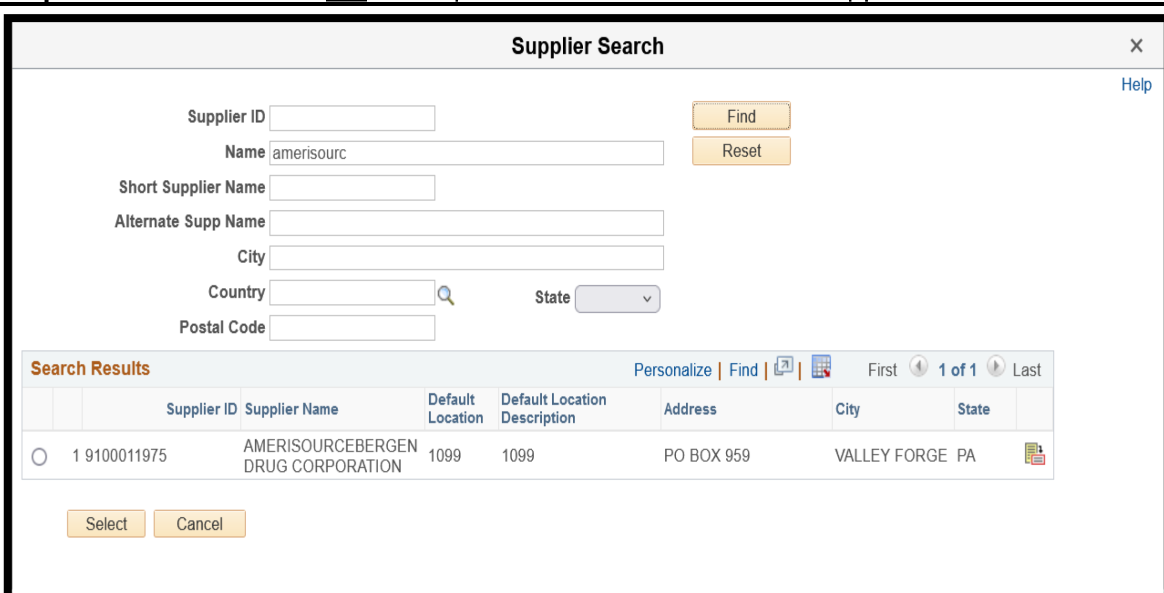
14 Next, click on the magnifying glass next to **Category**. In the pop-up box that appears, change the **Search By** option to **Description** and type in part of the **description of the good/service**. Note that the **Category Codes** are the same as the **GL Codes**. Locate the correct category and click on the **category number**.



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.



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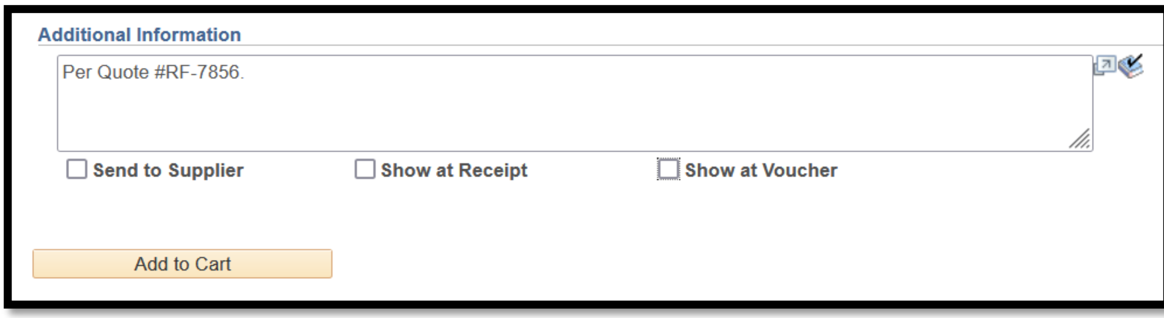
16	Scroll to the bottom of the screen under **Additional Information**. **ANY notes entered** in the additional information box will display as part of the Line Item Description on the formal Purchase Order that is sent to the supplier. Notes are <u>not</u> required, especially if they do not benefit 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.
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	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. 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.
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, or the Marketplace Contract Number. Make it something that will be meaningful to look up the **Requisition** later.

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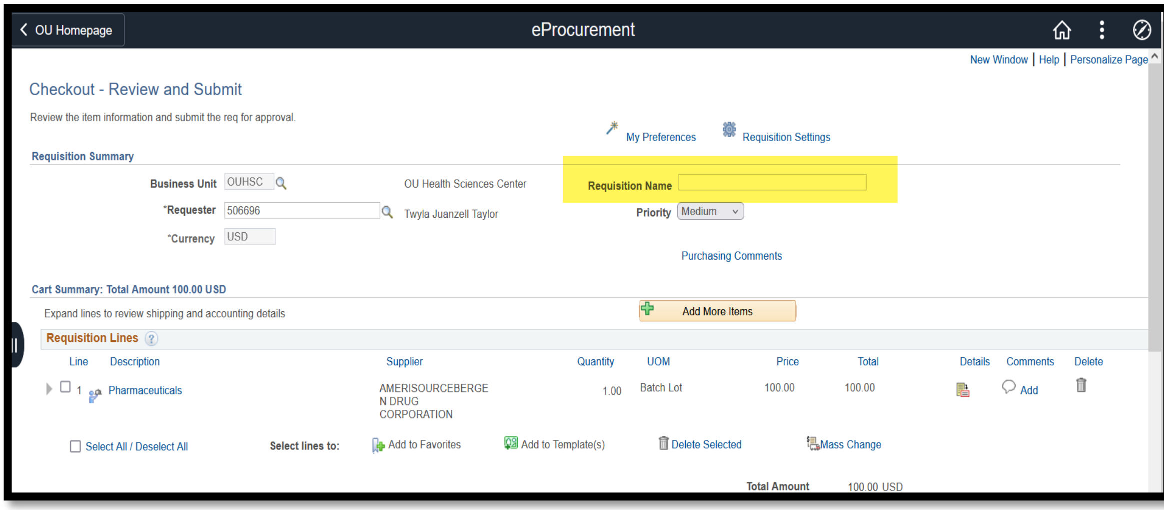
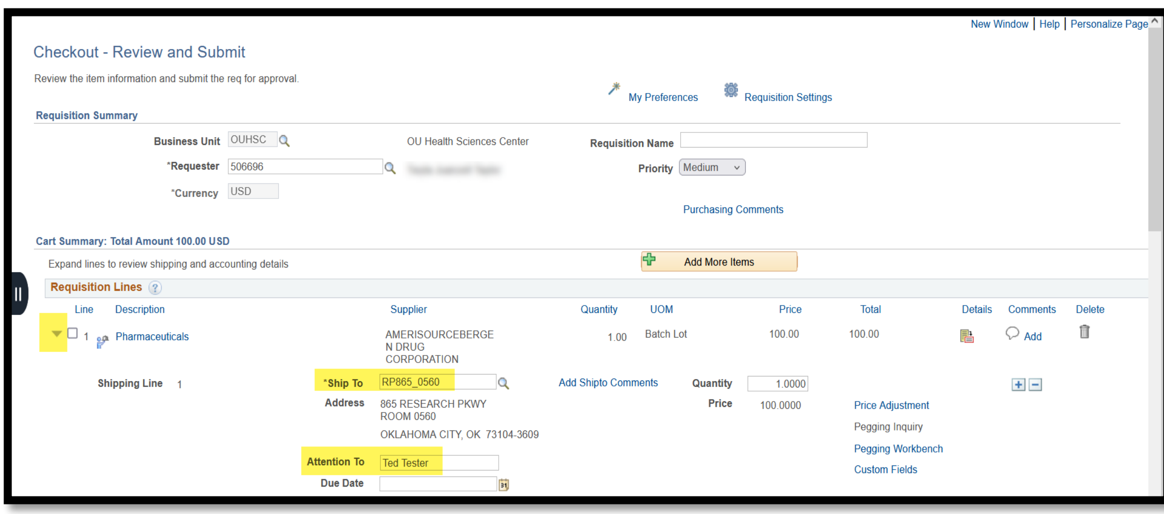
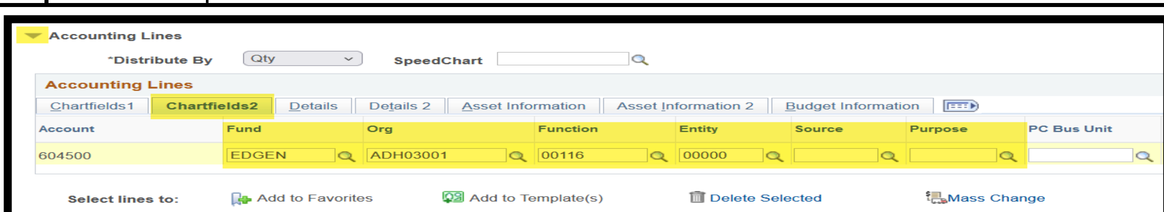


22 Click the **arrow** next to each line of the **Requisition** to ensure that the **Ship To** and **Attention To** lines are correct. Note that the information will automatically default from your **Requester Setup Settings**.



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.

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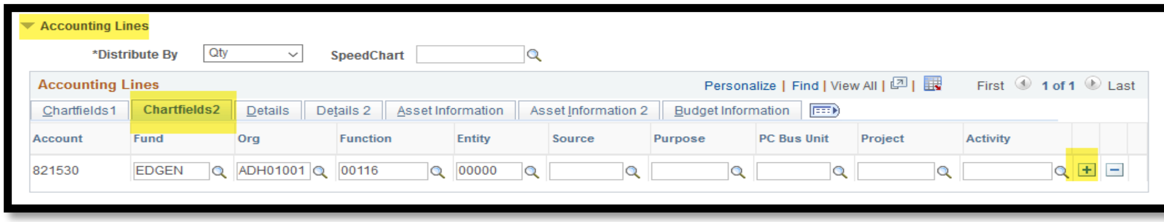
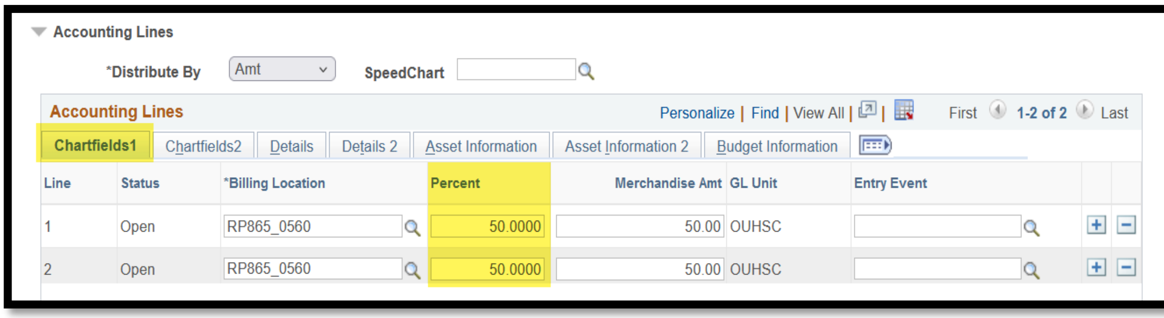
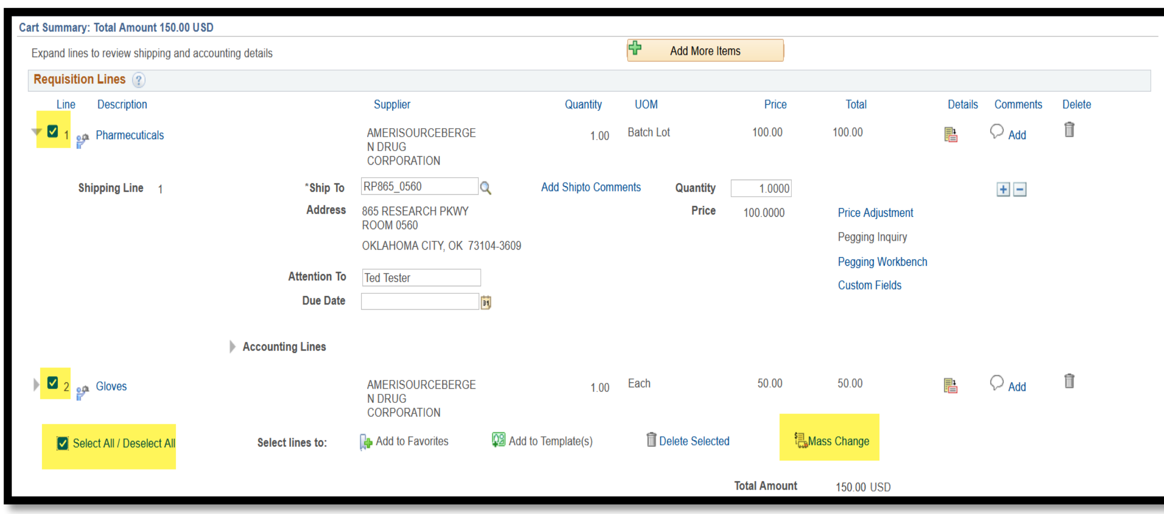


26 Next, click the **Chartfields1** tab to determine how the distribution lines should be split. Distributions will be split by percentage. Note that the percentage determined on the distribution lines will be the percentage that all invoices will be split for payment. Distributions cannot be changed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



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.



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

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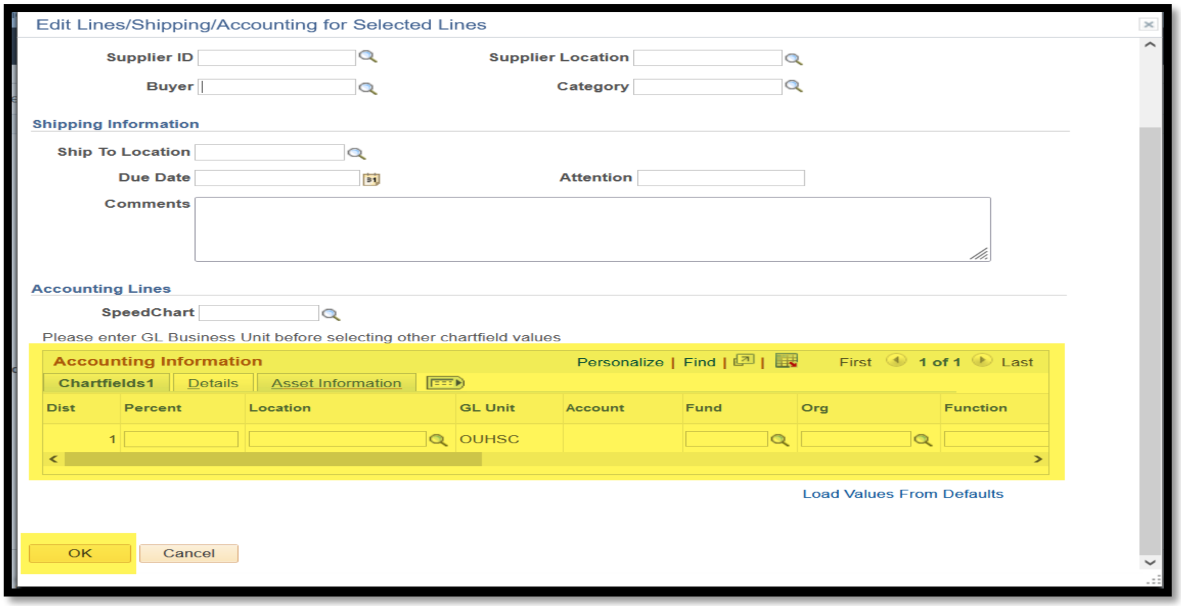
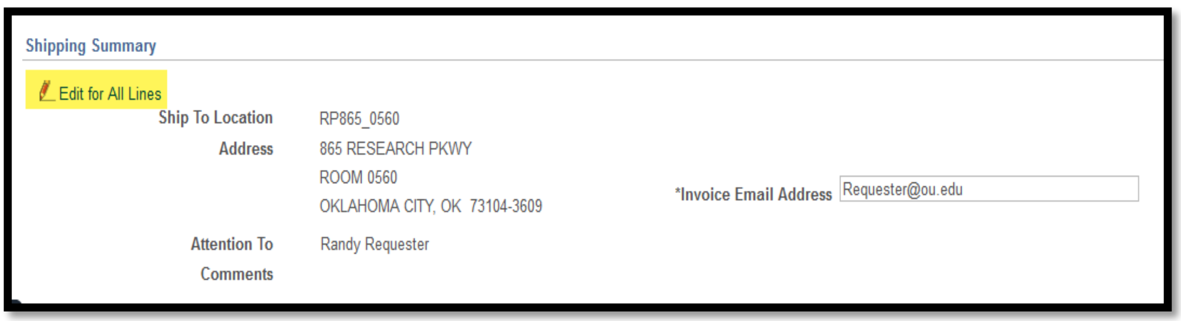
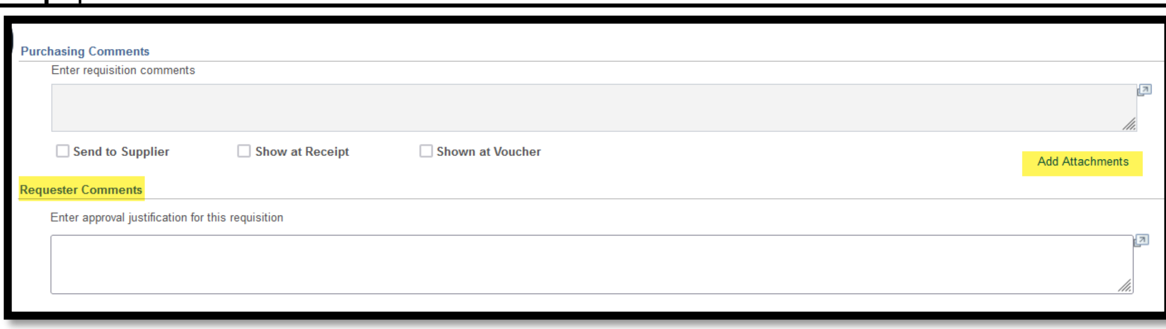


29 Ensure that under the **Shipping Summary** section the **ship to location**, **attention to name**, and **invoice email address** fields are all still accurate. Please note that the **Invoice Email Address** field is required. This information will be displayed on the PO and is the email address that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



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.



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**.

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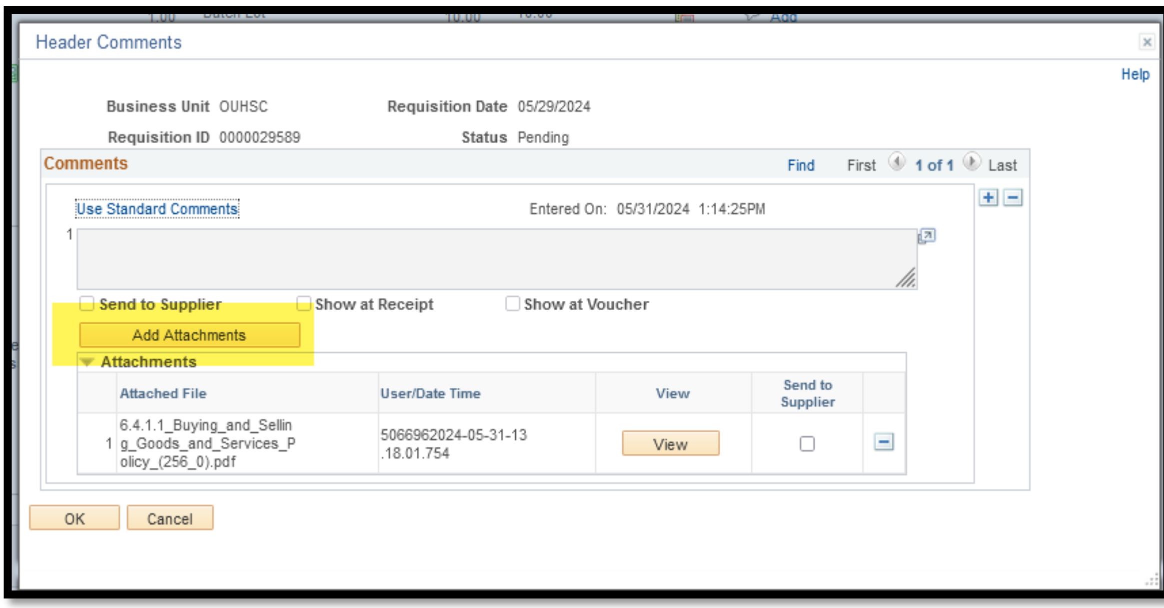
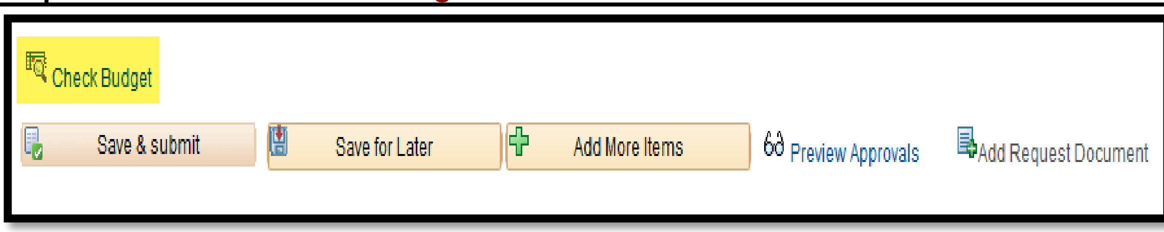
32	Additional attachments can be added by clicking **Add Attachments** again and following the previous instructions.



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**.

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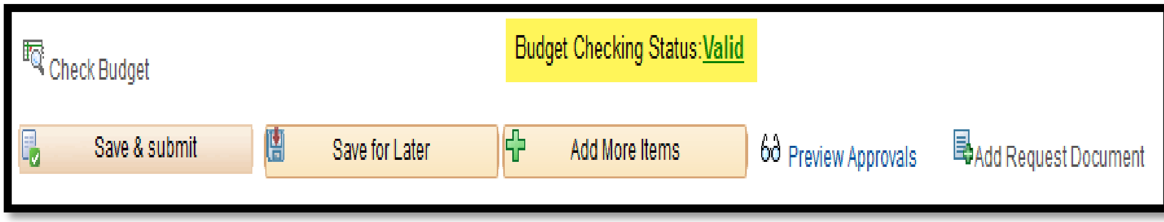
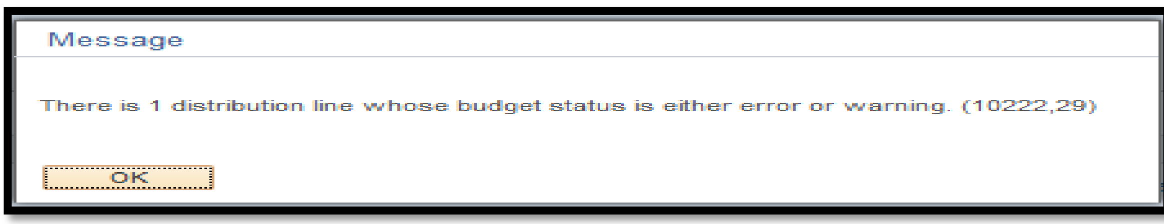
35 PeopleSoft will begin the budget checking process. When complete, your **Budget Checking Status** should display as **Valid**.

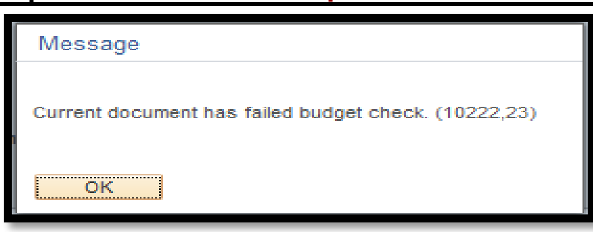


36 If a pop-up message appears indicating that there is an issue with the budget status, review your budget details to ensure that there are enough funds available to continue with orders on this chartfield spread.

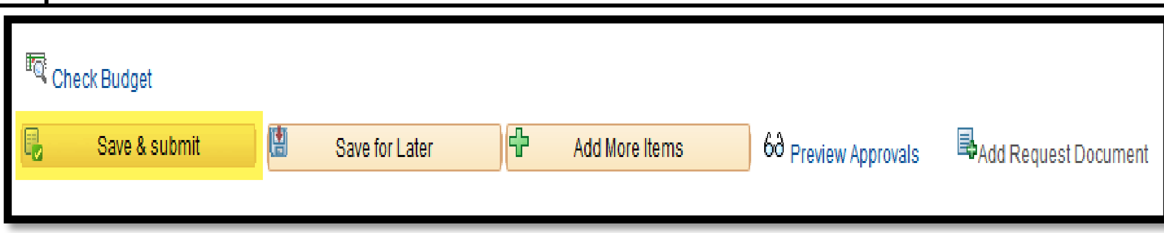
Hint: Refer to the job aid on **Budget Details** for more information on how to look up this information.



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



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



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

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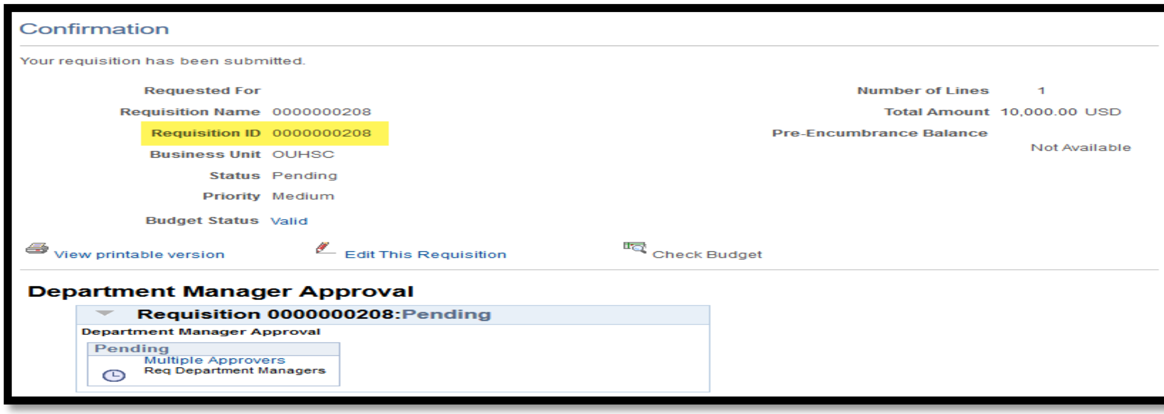
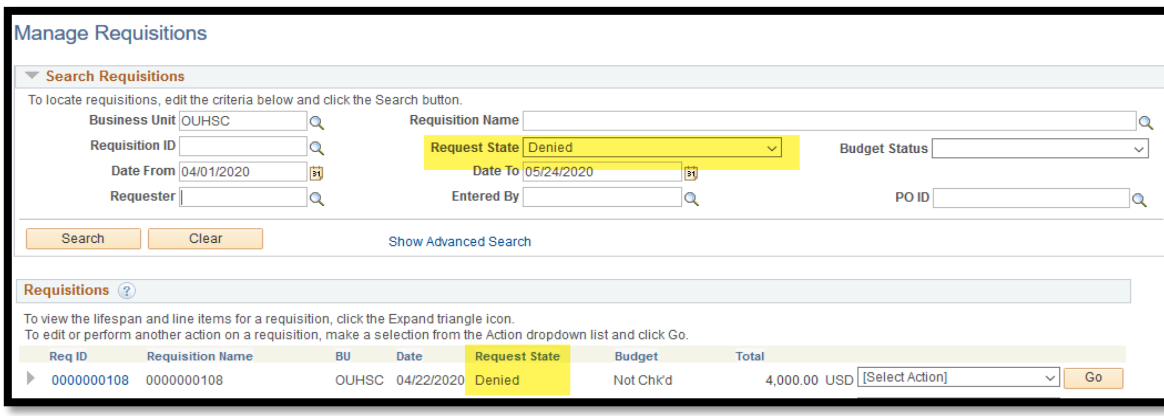
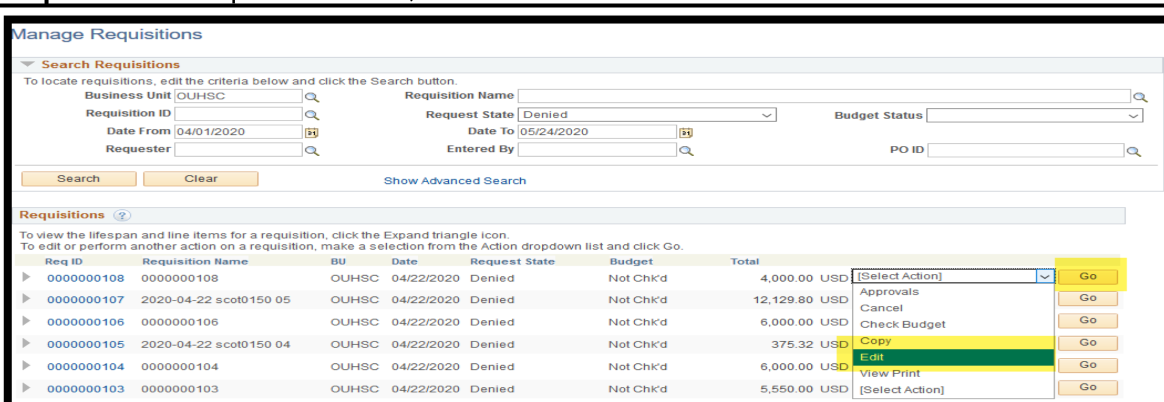


40	The workflow screen will show you who the approvers are for your **Requisition**.
41	To pull up a previously submitted **Requisition**, navigate to **eProcurement > Manage Requisitions**.
42	Note that a Requestor only has access to their own **Requisitions**. If an active **Requisition** was established 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**.



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



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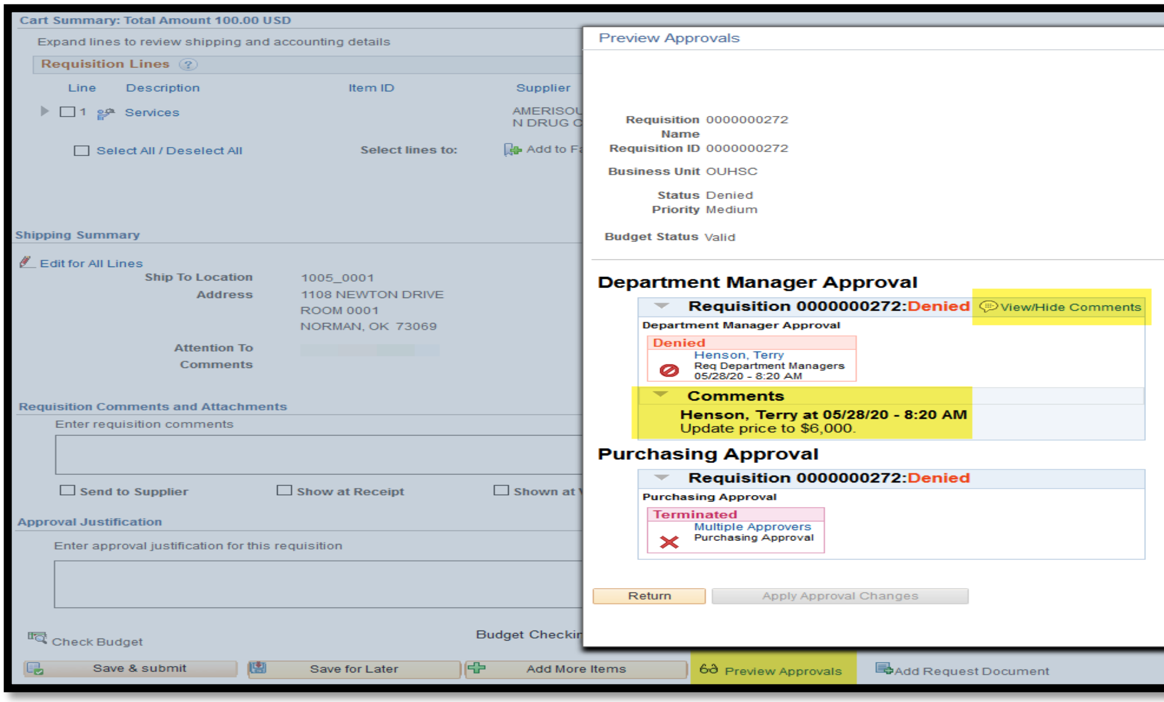
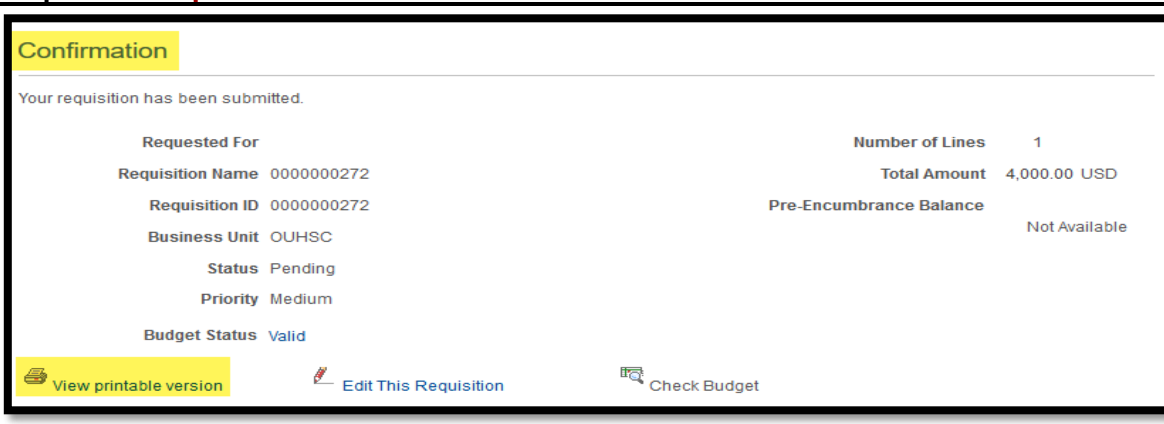
45 To view the reasons for denial, click on **Preview Approvals** and in the pop-up box that appears, expand the **View/Hide Comments** box. The denial reasons will appear in the **Comments** field.



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**.

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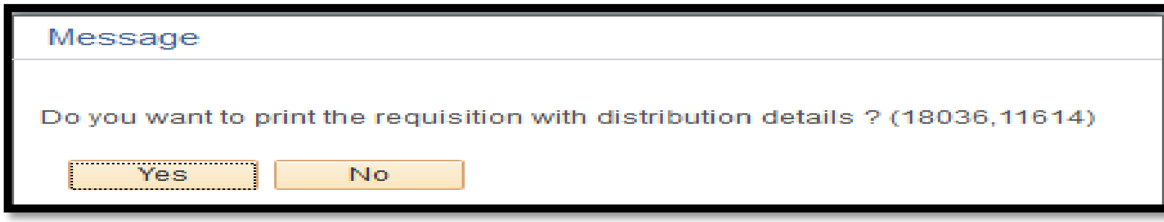
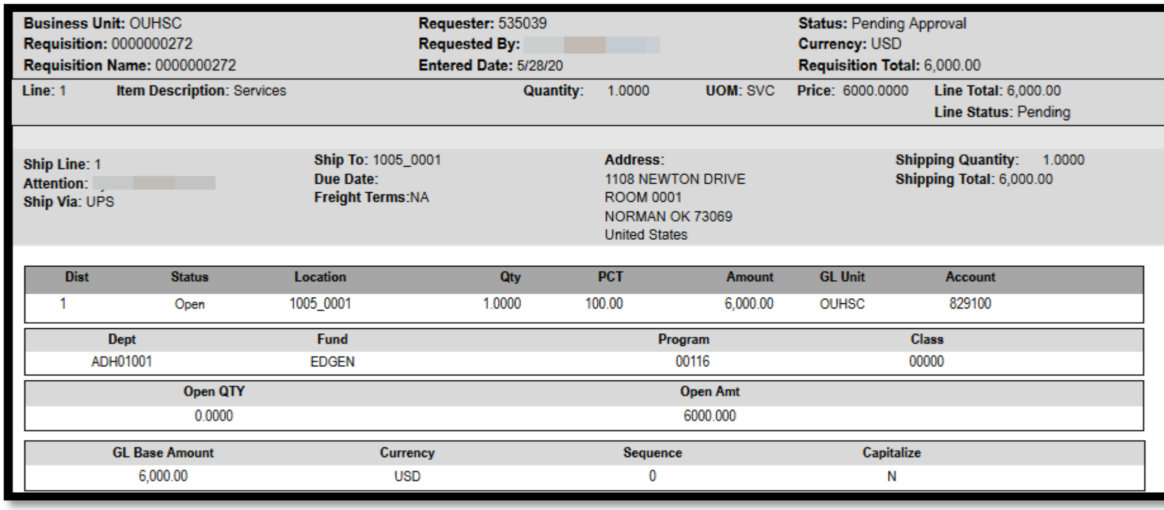


50	The details of the **Requisition** will appear and can be printed from this page.



Business Unit: OUHSC **Requester:** 535039 **Status:** Pending Approval
Requisition: 0000000272 **Requested By:** **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:** 1108 NEWTON DRIVE ROOM 0001 NORMAN OK 73069 United States **Shipping Quantity:** 1.0000
Attention: **Due Date:** **Shipping Total:** 6,000.00
Ship Via: UPS **Freight Terms:** NA

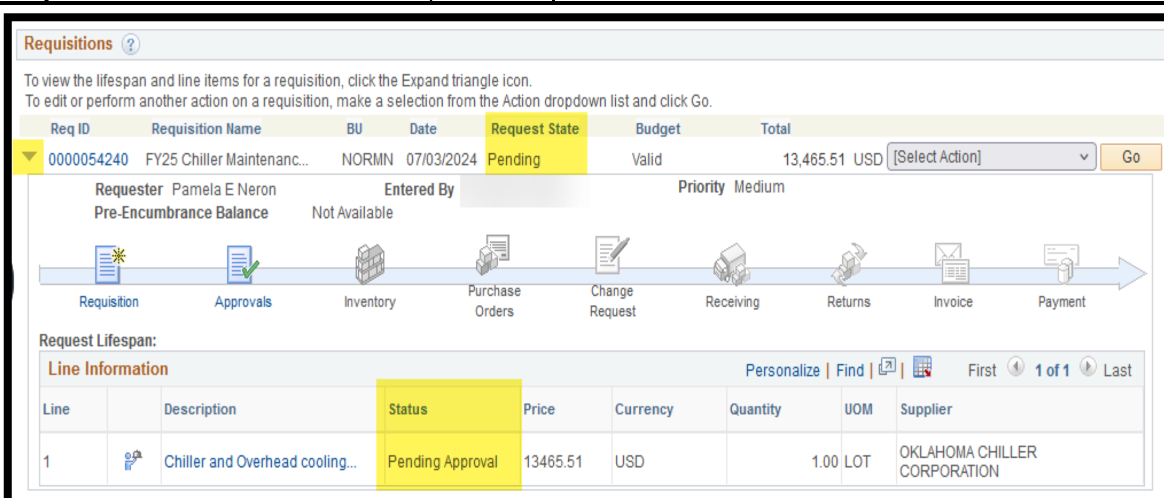
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	1005_0001	1.0000	100.00	6,000.00	OUHSC	829100

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

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.



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

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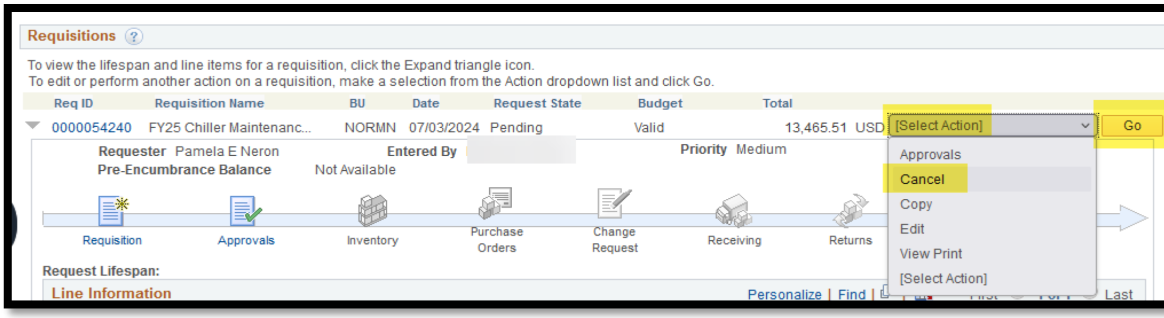
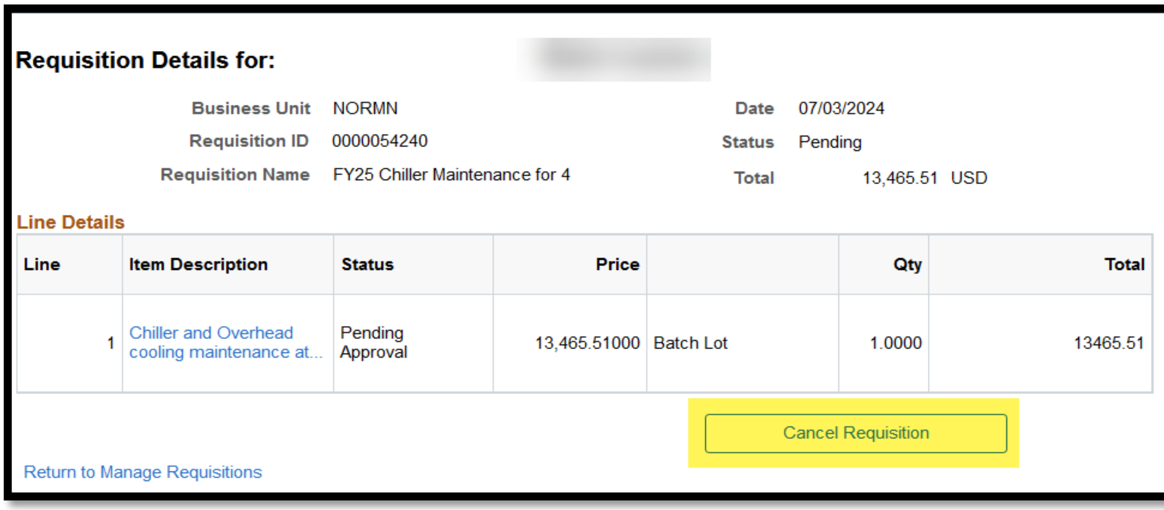
55 Under the **Select Action** drop-down menu for the **Requisition**, select **Cancel** and click the **Go** button.



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



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