

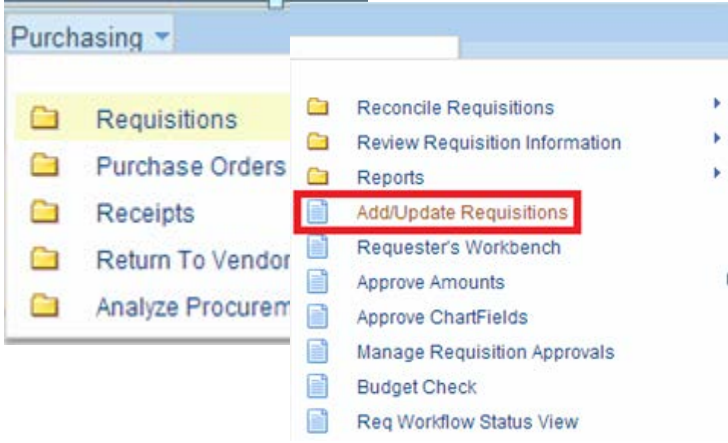
Purchasing Contact: 405-325-2811
 Website: www.ou.edu/purchasing

Table of Contents
9.2 Training Materials
For New Users

Table of Contents	1
Create Requisitions	
Maintain Requisition Page	2
Requisition Defaults	3
Mark All	3
Header Comments	4
Attach	4
Line Comments	4
Save Entry	4
Budget Check	4
View Printable Version	5-6
Select Status	7
Waiting for Bid	7
Splitting Chart fields	8
Copy Requisition	9
Update/Display Requisitions	
Search Feature	10
Making Changes	10
Inquire	
Requisition Workflow Status View	11
Document Status Inquiry – View PO's/Vouchers/Claims/Payments	12
Vouchers	13-15
Report Basics Printing Requisitions/Purchase Orders	
Run Controls	16
Process Monitor	17-19

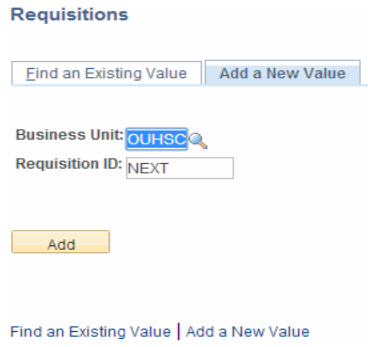
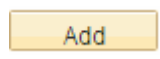
Step 1: Menu Choices

- ✓ Purchasing
 - ✓ Requisitions
 - ✓ Add/Update Requisitions



Step 2: Begin Entry

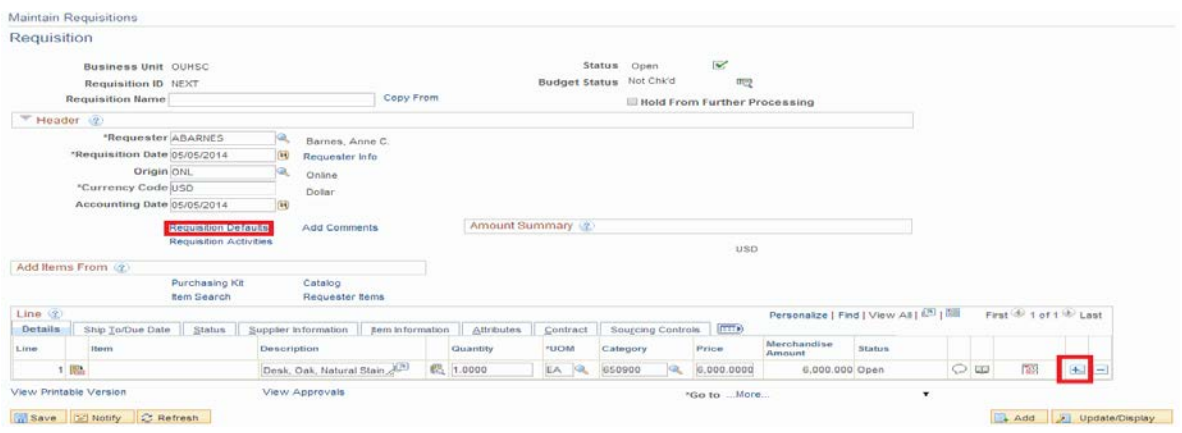
1. Click on ADD to create a new Requisition



1. Verify the Requester, change if necessary
2. Enter description; Quantity & Unit of Measure
3. Enter category (GL Account code); Price of Product
4. Click on the link [Requisition Defaults](#)

Step 3: Complete Maintain Requisitions Page

NOTE: If you are ordering equipment put the major item on line one.




NOTE: If adding additional lines click Add/Delete Rows by using these buttons



Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1		Desk, Oak Stain	1.0000	EA	650900	6,000.0000	6,000.000	Open
2		Chair, for the above Desk	1.0000	EA	660900	50.00000	50.000	Open

Step 4: Complete Requisition Defaults

1. Enter the Supplier ID#
Note: A valid supplier # begins with '91'
2. Enter the Buyer due date field
3. Ship to will default to SEE BELOW, enter in header comments
4. Verify Default Chartfield Spread listed below, change if necessary
5. Click OK 

Requisition Defaults

Business Unit OUHSC Requisition ID NEXT Requisition Date 05/19/2014 Status Open

Default Options: Default Override

Line: Buyer *Supplier 91 Unit of Measure Supplier Location


Schedule: Ship To Due Date Ultimate Use Code Attention To *Distribute By Amount

Look Up Supplier

SetID: MDCTR Supplier ID: begins with 91 Short Supplier Name: begins with

Search Results: Only the first 300 results can be displayed. View 100

Supplier ID	Short Supplier Name	Supplier Name	Additional Name	Our Customer Number	Old Supplier Number
910000003	4IMPRIKT-001	4IMPRIKT INC	NELSON MARKETING	(blank)	(blank)
910000004	A DANGIER-002	A DANGIER & COMPANY INC	A DANGIER AND CO INC	(blank)	(blank)
910000005	AAMCOMP IN-002	AAMCOMP INC	AAMCOMP INC	(blank)	(blank)
910000008	A AND B EN-001	A&B ENGRAVING INC	A & B ENGRAVING INC	(blank)	(blank)
910000012	ABET-001	ABET INC	ACCREDITATION BOARD FOR ENGINEERING AND	(blank)	(blank)
910000019	ACEEL-001	ACEEL	AF OF OKLAHOMA CITY LTD PARTNERSHIP	(blank)	(blank)
910000020	ACE SPLY A-001	ACE SUPPLY & SERVICE INC	ACE SUPPLY AND SERVICE INC	(blank)	(blank)
910000026	ADD TRONICS-005	ADDTRONICS BUSINESS SYSTEMS	CW COOK INC	(blank)	(blank)
910000028	AEC SOLUTI-004	AEC SOLUTIONS	AUDIO EQUIPMENT CO INC	(blank)	(blank)
910000030	AFFORDABLE-007	AFFORDABLE ART & FRAMES	ANCHOR PAINT CO OF OKC INC	(blank)	(blank)



This button will allow you to use the lookup option for any field. 

Default Chartfield.

Distributions

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity	Budget Date	Location	IN Unit
1		OUHS		CLNOP	COM001	00014	M0011				05/13/2014	BMS00373A	

Step 5: Entry

1. Select "Mark All" if you want all the information applied to the whole Requisition 
2. Click OK 

Retrofit field changes to "all" existing requisition lines/schedules/distributions....

Business Unit OUHSC Requisition Date 05/23/2014 Requisition ID NEXT Status Open

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules. For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line. Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the requisition. Select 'Apply to All Distribs' to apply changes to all distribution lines on the requisition.

Mark All Unmark All

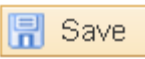
Retrofit Field Selection

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input checked="" type="checkbox"/>		Supplier	9100033284	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Supplier Location	MA-STAPLES	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Ship To	SEE BELOW	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Due Date	2014-05-31	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	GL Unit	OUHSC	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Fund	CLNOP	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1	Dept	COM001	<input type="checkbox"/>

OK Cancel Refresh

Step 6: Save the Entry


You will receive a Requisition number at this point.



Step 7: Complete Header Comments


Click on the 'Add Comments' link to add any comments (on the Maintain Requisition page)

The Header Comments contains information that pertains to the entire order.

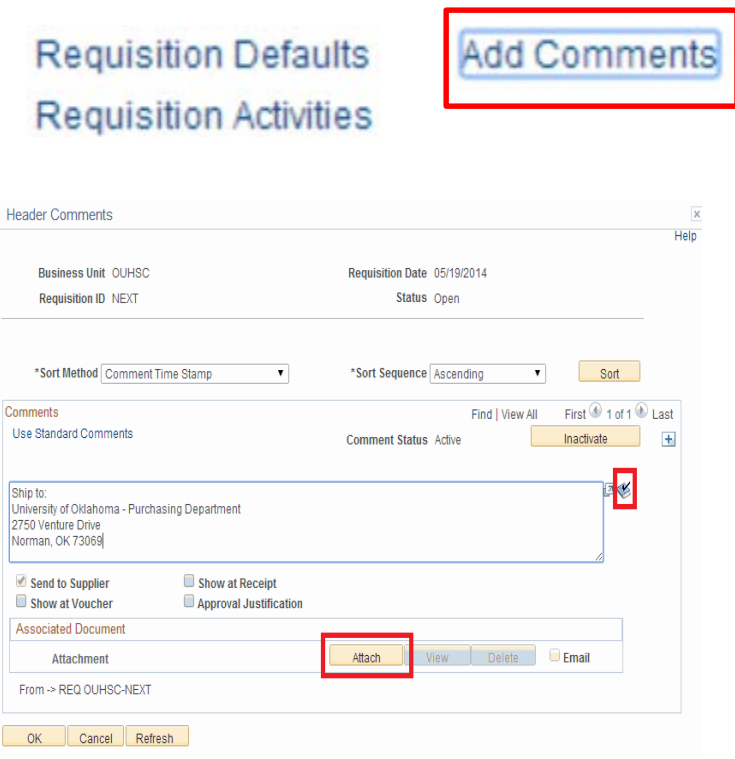
You can attach a file: Refer to Instructions 

Enter all Comments that pertain to this order. Include: Contact Name & Number; Standing Order Dates; Method of Shipment; General Description of purchase, etc..

Note: If you want your chartfield to print on requisition, enter as a comment.

Note: Spell check is available for comments boxes 

Click OK. 



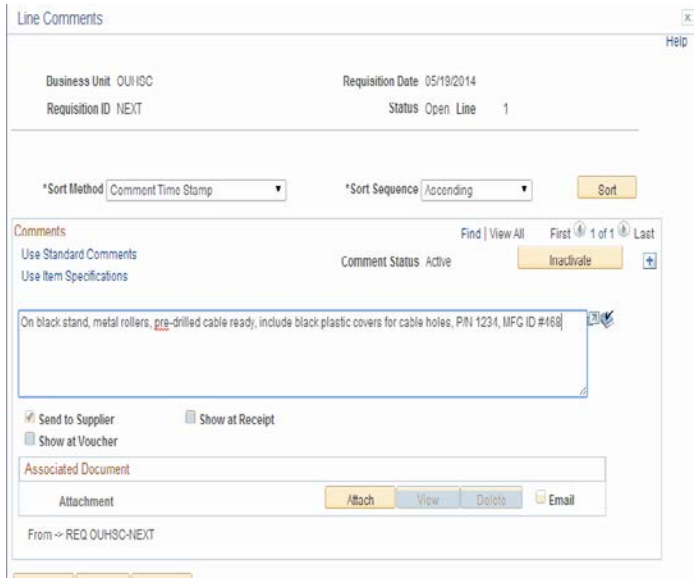
Step 8: Complete Line Comments

The Line Comments provide information that pertains to each specific line of merchandise or services.

This information is useful for the buyer and the vendor.

Enter all Comments that pertain to this line item. Include: Specific details of each item

Click OK 



Step 9: Save the Entry

Note: If you want to print your requisition click link. (You can only use this link if requisition is in Open and Not budget checked status.

[View Printable Version](#)

Step 10: Budget Check the Requisition

You can budget check the Requisition if the status is "OPEN"

View Printable Version

- ✓ To print from the Maintain Requisition page (Requisition must be in Open status to use this function)

Maintain Requisitions

Requisition

Business Unit OUHSC Status Open

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From Hold From Further Processing

Header ?

*Requester ABARNES Barnes, Anne C.

*Requisition Date 05/28/2014 Requisition Info

Origin ONL Online

*Currency Code USD Dollar

Accounting Date 05/28/2014

Requisition Defaults Add Comments Amount Summary ?

Requisition Activities USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requisition Items

Line ? Personalize | Find | View All | | First 1 of 1 | Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls				
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1		Desk, Oak Stain	1	ea	850900	6000.00	0.000	Open			

View Printable Version View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display

Step 1: Click on the 'View Printable Version' link

- ✓ A new page will open.

Step 2:

- ✓ Process notices are:
 - ✓ Queued
 - ✓ Processing
 - ✓ Success

- ✓ Results:
 - ✓ Another window opens and shows the status of the process requested

Queued

Process Name: PORQ010 Requisition Print SQR
Process Instance: 1286592 **Process Type:** SQR Report

- ✓ Once the process goes to 'Success', the requisition will open.

Requisition

Ship To: SEE BELOW

Business Unit: OUHSC OPEN		
Req ID:	Date	Page
0000069232	05/06/2014	1
Requisition Name:		
0000069232		
Requester		Currency
Barnes, Anne C.		USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		Warranty		1.0000	EA	500.00	500.00	05/10/2014
		Supplier: 918888888 BEST SOURCE						
1-2		Warranty		1.0000	EA	500.00	500.00	05/10/2014
		Supplier: 918888888 BEST SOURCE						
1-3		Warranty		1.0000	EA	500.00	500.00	05/10/2014
		Supplier: 918888888 BEST SOURCE						

- ✓ Click on the printer icon to print the requisition




Step 11: Change Status


The options for the Requisition status are: Approved, Complete, Open, Pending Approval, Cancelled

Status:	Approved
Status:	Open
Status:	Pending

STATUS OPTIONS:

Cancel – if requisition is in ‘open status’ and budget checked, and you want to cancel the Requisition before any approval, contact the buyer 

Open - if you are not finished with the Requisition


Pending Approval - if the Requisition is ready for Approval, then click the Approve Checkmark to save in Pending Status 

ORIGIN OPTIONS-This step is only needed if you want price comparison:

ONL - The default setting

WB – Waiting for bid: If receiving bid information, if you want Purchasing to do price comparison or Parking for new year

Origin:

ONL 

Origin

BAT

FSA

HHP

OND

ONL

PCV

WB

Online

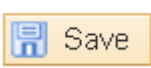
NOTE: DO NOT BUDGET CHECK or click the APPROVE BUTTON on the Requisition 

Best Source Vendor = 9188888888

Once you receive the bid information back from the buyer, you will need to open the Requisition and:

- 1) Change the Origin from WB to ONL
- 2) Update all of the Changes – Amount, Quantity, etc.
- 3) Update the Vendor # on the Requisition Defaults page
- 4) If this is a standing order for year-end, change the Requisition date to 07-01-XX

Step 12: Save the Entry



❖ Feature: Splitting Chartfields

Follow steps to entering a requisition on pages 2-4

You may need to split the Chartfield spread. You can do this by inserting rows and editing each line of coding to match your needs.

Click Schedule Button



Click Distribution Button



Distribution Details

Maintain Requisitions

Distribution

Requisition ID 0000069274

Line 1

Schedule 1

Ship To SEE BELOW SEE BELOW

Quantity 1.0000 EA

*Distribute By Amount

USD

SpeedChart Multi-SpeedCharts

Distrib	Status	Percent	Merchandise Amount	GL Unit	*Account	Fund	Dept	Program	Class	PC Bus Unit	Project	Activity
1	Open	50.0000	250.00	OUHSC	600100	STATE	TRN001	00116	00000			
2	Open	50.0000	250.00	OUHSC	600100	CLNOR	TRN001	00124	00000			

OK Cancel Refresh

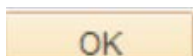
Drop-down 'Distribute by:' will default to 'Amount' (Leave default to 'amount')

Add/Delete Rows by using these buttons



* Make changes to chartfield

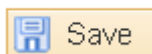
Click OK



Return to Main Page

[Return to Main Page](#)

Save



❖ Feature: Copy Requisition

Click on 'Add a New Value'

Find an Existing Value Add a New Value

Business Unit:

Requisition ID:

Add

You will be able to copy an existing Requisition, to create a new Requisition, by clicking the 'Copy From' link

Maintain Requisitions

Requisition

Business Unit OUHSC

Requisition ID NEXT

Requisition Name Copy From

Type in the Requisition ID number that you want to copy, including all the zeros

Click 'OK' or hit 'Enter' on your keyboard

Maintain Requisitions

Copy Requisition

Header

Business Unit

Requisition ID

Requisition Name

Req Status

Requester

Requester Name

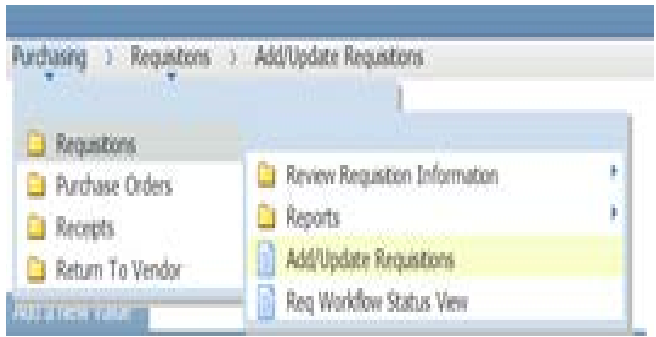
Requisition Date

You must go to the Requisition Defaults link and enter the Due Date for this new Requisition as this information does NOT copy over


Requisition Defaults

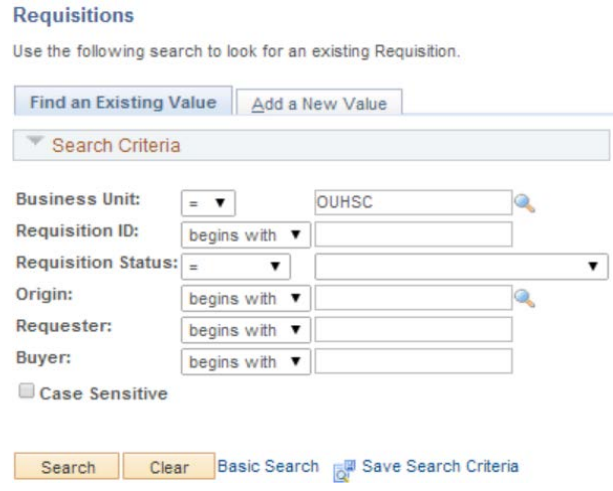
Step 1: Menu Choices

- ✓ Purchasing
 - ✓ Requisitions
 - ✓ Add/Update Requisitions



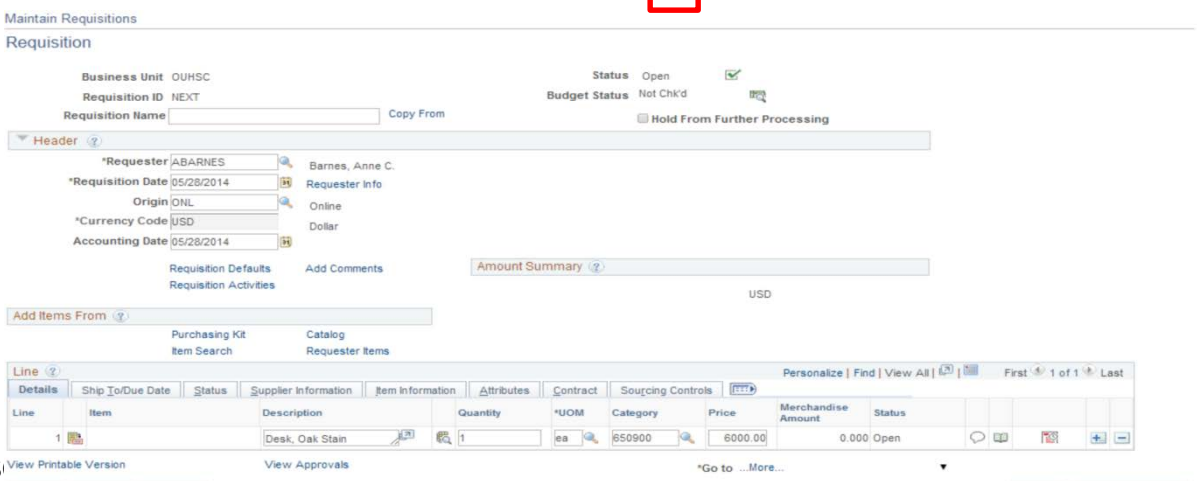
Step 2: Find Existing Requisition

1. Click on 'Find an Existing Value'
2. Use the search options feature by completing one or more fields
3. Click search 



Step 3: Make Changes to an Existing Requisition

1. Changes can be made to the Requisition if the status of the Requisition is "OPEN"
2. Make any changes that are necessary
3. Follow steps 9 & 10 on page 4 if necessary



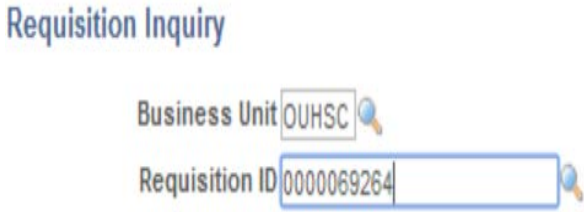
Step 1: Menu Choices

- ✓ Purchasing
 - ✓ Requisitions
 - ✓ Review Requisition Information

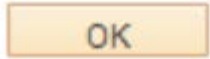


Step 2: Search Criteria

Enter the Requisition ID that you want to view.



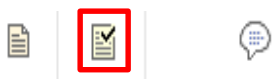
Click



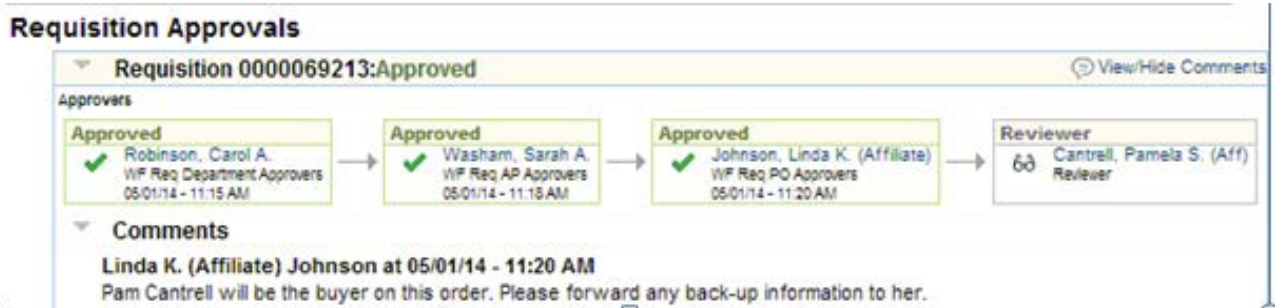
Step 3: Click on Status Tab



Step 4: Click on approval icon

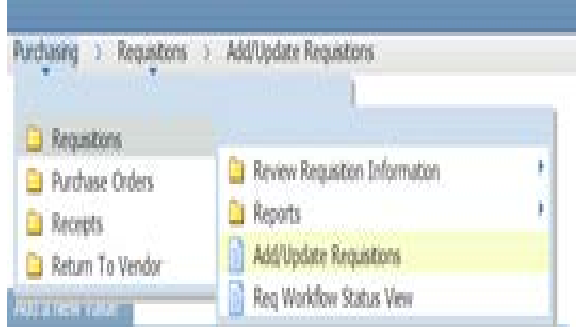


Step 5: View Results



Menu Choices

- ✓ Purchasing
 - ✓ Requisitions
 - ✓ Review Requisition Information



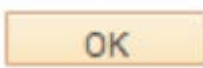
Enter Requisition ID

Requisition Inquiry

Business Unit

Requisition ID

Click

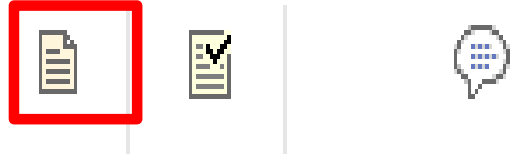


*Click on Status Tab

Requisitions

Req Inquiry	
Details	Status
Unit	Requisition
OUHSC	0000069264

*Click Document Status Icon



❖ Search Criteria

Documents can be viewed that are related to your requisition

- ✓ Purchase Order
- ✓ Voucher
- ✓ Payment info

Req DOC Status

Document Status

Business Unit: OUHSC **Req ID:** [000039660](#) **Status:** Complete
Document Date: 01/14/2006 **Document Type:** Requisition **Budget Status:** Valid
Currency: USD **Amount:** 111,897.000
Requester: Waxman, Frank (RO)

Associated Document

[Customize](#) | [Find](#) | [View All](#) | | [First](#) | 1-6 of 9 | [Last](#)

Documents

Related Info

SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Vendor ID	Location	
MDCTR		Payment	0000852942	Posted	02/17/2006	9100001176	OK-NE 13TH	
MDCTR		Payment	0000855247	Posted	02/27/2006	9100001176	OK-NE 13TH	
MDCTR		Payment	0000875318	Posted	04/28/2006	9100001176	OK-NE 13TH	
MDCTR		Payment	0000884678	Posted	05/26/2006	9100001176	OK-NE 13TH	
	OUHSC	PO	0000038654	Compl	01/20/2006	9100001176	OK-NE 13TH	
	OUHSC	Voucher	00894890	Posted	10/12/2005	9100001176	OK-NE 13TH	

Step 1: From the Document Status page, click on the Voucher #

OUHSC	00894890	Voucher	Posted	10/12/2005	9100001176
-------	--------------------------	---------	--------	------------	------------

The Voucher Inquiry Results page will open.

Notice your voucher number is defaulted in the Voucher ID field

Voucher Inquiry

Search Criteria

Search Name	<input type="text" value="ALL"/>	
	From	To
Business Unit	<input type="text" value="OUHSC"/>	<input type="text" value="OUHSC"/>
Voucher ID	<input type="text" value="00894890"/>	<input type="text" value="00894890"/>
Invoice Id	<input type="text"/>	<input type="text"/>
Vendor SetID	<input type="text" value="MDCTR"/>	<input type="text"/>
Short Name	<input type="text"/>	<input type="text"/>
Vendor ID	<input type="text"/>	<input type="text"/>

Step 2: Search Criteria

You will have several options for search criteria.

Suggested Fields: Voucher ID; Invoice #; or Vendor ID.

Choose one field and enter the information.

Click Search

Step 3: View Results

Click "Action" drop down button to view

Voucher Details

Payment Information = Check Number

Voucher Inquiry Results									
Personalize Find View All [Print] [Calendar] First									
Voucher Details	Amounts		More Details		Supplier Details				
Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier
▼ Actions	OUHSC	00894890	50370500INV1	10/12/2005	9100001176	Postable	<input type="checkbox"/>	Not Applicable	OKLAHOMA M-

Step 3: View Results

Voucher Details

Business Unit	OUHSC	Gross Amount	27,447.750
Voucher ID	00894890	Misc Charges	0.000
Invoice No	50370500INV1	Total VAT	0.000
Invoice Dt	10/12/2005	Attachments	(0)
Supplier ID	9100001176	Comments	(0)
Name	OKLAHOMA MEDICAL RESEARCH FOUNDATION	Transaction Currency	USD

Invoice Lines																					
Find View All First 1 of 1 Last																					
Line	1	Description	Agreement for the services of				Merchandise Amt	27,447.750													
Item ID		Quantity	1.0000	UOM	LOT	Unit Price	27,447.75000														
PO Business Unit	OUHSC	PO Number	0000038654	PO Line	1	PO Schedule	1														
Receipt Unit		Receipt Number		Receipt Line		Schedule															
Distributions																					
Personalize Find View All [Print] [Calendar] First 1 of 1 Last																					
Distrib Line	1	Merchandise Amt	27,447.750	GL Unit	OUHSC	Account	921800	Fund	SPNSR	Dept	COM107	Program	00012	Class	00000	PC Bus Unit	OUHSC	Project	C1025002	Activity	01

Voucher Payment Information

Business Unit	OUHSC	Voucher ID	00894890	Invoice Number	50370500INV1
Supplier Name	OKLAHOMA MEDICAL RESEARCH FOUNDATION	Supplier Location	OK-NE 13TH		
Gross Invoice Amount	27,447.750	Transaction Currency	USD		

Details										
Personalize Find View All [Print] [Calendar] First 1 of 1 Last										
Bank SetID	Bank Code	Bank Account	Payment Reference ID	Applied Business Unit	Applied Voucher ID	Payment Date	Payment Amount	Payment Currency	Voucher Paid Amount	Payment Status
MDCTR	OST	111	852942			02/17/2006	27,447.750	USD	27,447.750	Paid

❖ Generate and Print Reports, Requisitions & Purchase Orders

The Basic Setup for All Reports is the same. The first step will be to make sure that you have a Run Control to use for your report.

If you name your Run Controls to match the type of report, you will not have to setup the parameters each time you run the report.

If you have an existing Run Control – Use the Find an Existing Value tab and click the Search button to list your Run Controls.

Requisition Print

Enter any information you have and click Search. Leave fields blank

Find an Existing Value **Add a New Value**

Run Control ID: begins with

Case Sensitive

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

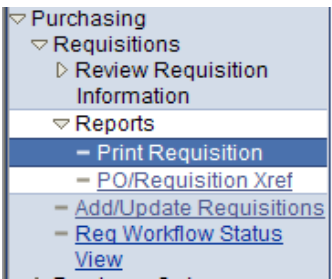
If you need to set up a new Run Control – Use the Add a New Value tab and click the Add button to create a new Run Control.

Requisition Print

Find an Existing Value **Add a New Value**

Run Control ID:

Add



- ✓ Step 1:
 - ✓ Enter;
 - ✓ The Business Unit – OUHSC
 - ✓ The Requisition #

Requisition Print

Run Control ID: Req_Print [Report Manager](#) [Process Monitor](#) Run

Language: English Specified Recipient's

Report Request Parameters

Business Unit: ←

Requisition ID: ←

From Date: 31

Through Date: 31

Requester:

Statuses to Include

Approved Select All

Canceled

Completed

Open

Pending

On Hold AND Not On Hold ▼

- ✓ Step 2:
 - ✓ Click on the 'Run' button Run
 - ✓ Server name will be PSNT

Process Scheduler Request

User ID: STOTTEN Run Control ID: reqprint

Server Name: PSNT ▼ Run Date: 31

Recurrence: ▼ Run Time: Reset to Current Date/Time

Time Zone: 31

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web ▼	PDF ▼	Distribution

Click OK

- ✓ Step 3:
 - ✓ Click on the Process Monitor button

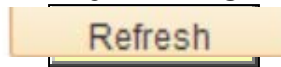
Process Monitor

❖ Using the Process Monitor

The Process Monitor has the same functionality for all types of reports. It monitors the progress of your report request.

The Process List tab will display the specific report that you are currently running.

NOTE: The Run Status of the Report can be updated by clicking on the Refresh button.



The Number of Days can be changed by the user to see more than just 1 day of reports.



Once the Run Status has changed to 'Success' 'Posted', click on Details.

User ID Type Last Days

Server Name Instance to

Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3979273		SQR Report	PORQ010	LJOHNSO4	06/16/2014 9:56:24AM CDT	Success	Posted	Details



Using the Process Monitor – cont'd

Click on View Log/Trace.

Request Created On:	05/22/2006 3:36:15PM CDT	Parameters
Run Anytime After:	05/22/2006 3:36:12PM CDT	Message Log
Began Process At:	05/22/2006 3:36:18PM CDT	Batch Timings
Ended Process At:	05/22/2006 3:36:32PM CDT	View Log/Trace



Click on the name of the report (the pdf file.)

File List	
Name	
SQR_PORQ010_1286598.log	
porq010_1286598.PDF	
porq010_1286598.out	



An Adobe Acrobat window with the requisition will open and you will need to select the print icon to print.

