Peoplesoft Requisition Entry

1. Log in to the Peoplesoft Financials link located at compass.ou.edu under PeopleSoft Production Financials Environments, or through this link: Oracle PeopleSoft Sign-in (ou.edu). ۵ The UNIVERSITY of OKLAHOMA Home номе / PeopleSoft Production Financial Environments Financials (FSPRD) - Production System - PUM 35 on Tools 8.57.10 Financials OU Marketplace - Production System - For Shoppers Only PeopleSoft Production HR Environments Adaptive Budget and Planning PeopleSoft NON-PROD COMPASS FS Environments PeopleSoft NON-PROD COMPASS HR Environments NORMAN Legacy HRMS and FIN Systems - Inquiry Only OUHSC Legacy HRMS and FIN System - Inquiry Only OU IT Web Services 1 HELT0009 \sim 2. The log in page display. ORACLE PEOPLESOFT User ID Password Select a Language English Sign In Enable Screen Reader Mode

3. Once logged in, select the eProcurement tile.

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5. Select the Special Request link.

OU Homepage		erio	curement			☆ : ∅
Manage Requisitions	Create Requisition (2)					New Window Help Personalize Page
Requisition	Welcome Kimberely J Helton	畲	Home 🥕 My Preferences 👹 Requisition Settings	I 🚝 <u>0 Lines</u>	Checkout	
Requester Setup	Request Options	Search All	•	Search	Advanced Search	
Activity Summary	Enter search criteria or select from the menu on the right to begin creating your requisition.	Web Browse Supplier Websites OU Marketplace	Special Requests Create a non-catalog request			
Print POs		OU Marketplace				
Supplier						
	11					

description of the item or service. If buying items, the Item Description must match the description on the quote. The quote below shall be used as an example to create a requisiton for items.

This quote has two types of items, with different descriptions and prices, and is ordering two of each item.

Qty Ord	Item Description	SKU# MFR#	Item Price	Amount
2	SMITH-VICTOR 36"PRO-DUTY COPY STAND w/LED LGHT KI/REG	SM36PDCSKT	292.49	584.98
2	VELLO WIRED REMOTE f/CANON DSLR w/3-PIN II/REG	(402182) VERSC2II (RSC2II)	5.96	11.92
I		I		I

7. Enter the Item Description to match the quote exactly, with one exception. Peoplesoft cannot process credits or negative balances within the funding lines. Instead of entering negative balance lines, instead apply the credit amount to another line. Enter the price of a single item, so in this example \$292.49. The Quantity is 2. There are only two options for the Unit of Measure available: Ea for 'each' and Lot. Since this is order has a defined quantity of items and set incremental prices, this is a 'definite quantity' purchase; use Ea.

Create Requisition @ Welcome Kimberely J Helton Request Options	All Search All Search Example 2	New Window Help Personalize Page
All Request Options Web OU Marketplace Special Requests	Special Requests @ Enter information about the non-catalog item you would like to order: Item	Look Up Unit of Measure × Help Unit of Measure begins with V Look Up Clear Cancel Basic Lookup Search Results View 100 First @ 1-2 of @ Last Unit of Measure Description EA Each Each LOT Batch Lot Batch Lot
	Additional Information	x x

If the order has an 'indefinite quantity,' or is a service or unknown quantity contract, then LOT is used, and the quantity is always 1. You may select the looking glass by the Unit of Measure to find the available options.

Fill in the Category code and Supplier ID number. 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: 91888888888.

This ID can be updated in the requisition later by the Requestor. Procurement will not source a Purchase Order to a Best Source supplier ID.

Notes may be entered in the additional information box if they are needed to be displayed in the line on the Purchase Order. Line notes are not required. If the notes need to be displayed on the PO, select the checkboxes by the Send to Supplier, Show at Receipt, and Show at Voucher.

Select Add to Cart.

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Welcome Kimberely J Helton			Requisition Settings 📜 1 Line	Checkout	
Request Options	Search	Home > My Preferences	Searce		
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All Request Options	Special Requests	3			
OU Marketplace		non-catalog item you would like to or	der:		
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	*Price	5.96	*Currency USD		
	*Quantity	2.00	*Unit of Measure ea	Q	
	*Category	660400			
	Supplier Supplier ID	9100035226			
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			Custom Fields			
Cart Summary: Total Amount 596.90 USD						
Expand lines to review shipping and accounting details		÷	Add More Items			
Requisition Lines ②						
Line Description	Supplier	Quantity UON			Details	Comments
Smith-Victor 36" pro-duty copy	B&H PHOTO-VIDEO- PRO-AUDIO	2.0000 Each	292.4900	584.98		💬 Edit
Vello Wired Remote f/Canon	B&H PHOTO-VIDEO- PRO-AUDIO	2.0000 Each	5.9600	11.92		
Select All / Deselect All Select line	es to: 🙀 Add to Favorites 🕼 Add to	Template(s)	Delete Selected	Mass Change		
Shipping Summary			Total Amo	unt 596.90 U	SD	
Ledit for All Lines						
Ship To Location DEFAULT Address SAME AS SHIPPIN Attention To Kimberely J Helton Comments		firmation				
Requisition Comments and Attachments						
Change the Ship To addres	s from Default to the lo	ocation the	item or servi	ice will be	e provi	ided.

Line	Description		Supplier	Quantity	UOM		Price	Total	Details	Comments	5
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							Total Amount	596.90 USD			

12. Select the triangle beside the Accounting Lines. You may personalize how these chart fields display. For example, select Personalize, select the Dist Type and then select Hide. Scroll down to the bottom of the pop out and select OK. This field will no longer display.

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13. Fill in your Department's accounting codes and the GL code specific to each line. If you are unsure what codes should be used in the Accounting Lines, please contact Finance.

Chartfields1	Chartfields2	<u>D</u> etails De <u>t</u> a	ils 2 Asset Infor	mation Asse	et Information 2	Budget Informa	ition 📼			
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14. If you have multiple lines that have the same accounting. Select the lines the information will apply to, and then select the Mass Change link. Enter the accounting information and then select OK.

Cline Description	
Smith-Victor 36" pro-duty	▼ Accounting Lines
Сору	*Distribute By Qty V SpeedChart Q
Shoping Line 1	Accounting Lines Personalize Find View All 🗇 🔣 First 🕜 1 of 1 🕑 L Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information 🚥
	Account Fund Org Function Entity Source Purpose PC Bus Unit Project Activity
	Select lines to: 🏚 Add to Favorites 🖓 Add to Template(s) 📳 Delete Selected 👫 Mass Change
	Edit Lines/Shipping/Accounting for Selected Lines ×
	Help
	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.
Vello Wired Remote f/Ca	
Shipping Line 1	Buyer Q Category Q
	Shipping Information
	Ship To Location
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	OK Cancel
•	
A pop up appear	s verifying how to make the changes. For this example, the All Distribution
Lines is selected.	
Select OK.	Distribution Change Options ×
Sciect OK.	Help
	пер
	For the selected requisition lines that are available for sourcing, apply distribution changes to
	All Distribution Lines
	Apply changes to all existing distribution lines.
	Matching Distribution Lines Apply changes to each existing distribution line by matching the distribution line pumpers
	Apply changes to each existing distribution line by matching the distribution line numbers.
	○ Replace Distribution Lines

Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Fiscal Year Renewal Process

16. If the requisition is requesting a renewal to be effective July 1, select the Line Detail

Expand lines to review shipping and accounting d	etails				÷	Add More It	ems				
Requisition Lines ②											
Line Description		Supplier		Quantity	UOM		Price	Total	Details	Comments	
Smith-Victor 36" pro-duty copy		B&H PHOTO-VIDEO- PRO-AUDIO		2.0000	Each		292.4900	584.98		🖗 Edit	
Shipping Line 1	*Ship To	DEFAULT	Q	Add Shipto Com	ments	Quantity	2.0000			+	
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Vello Wired Remote f/Canon DSL		B&H PHOTO-VIDEO- PRO-AUDIO		2.0000	Each		5.9600	11.92	B		
Shipping Line 1	*Ship To	DEFAULT	Q	Add Shipto Com	ments	Quantity	2.0000			+	IE
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Select All / Deselect All	Select lines to:	👍 Add to Favorites	🛛 Ad	d to Template(s)	î	Delete Selecte	d f	Mass Change			
		ξų		(-)							
							Total Amount	596.90 US	D		

17. Select the Fiscal Year Renewal option. This will prevent the requisition from budget checking and will be used to update Fiscal Year renewals each July 1. This option is only available for a

specific time.		Line Deta	ils	×
Select OK to apply the status.	Line Details @ No Image Line 1 🐕	Smith-Victor 36" pro-duty copy	Line Status Open	Help 🔺
	▼ Item Details 👔			
	Merchandise Amount Category Original Substituted Item Description Physical Nature Buyer	584.98 USD 660400 Goods ✓ 477569 Buyer Information Configuration Info	Waiting on Bid Device Tracking Fiscal Year Renewal Amount Only Inspection Required	
	Line Details	×		
	h-Victor 36° pro-duty copy Line Sta	Help = -		
Category 660. Original Substituted Item Description Physical Nature Gov Buyer 477 Buy	400 Devic S Fisco Ods V Inspe	ng on Bid le Tracking Il Yaar Renewal unt Only ction Required		
Contract Information ②	Ise Contract if Available			
Contract ID	্ ার্ট্রে			

18. 1.The option to budget check the requisition is removed when the Fiscal Year Renewal option is selected. Select Save for Later, and then select Return to Requisition to exit the requisition. Otherwise the requisition will ask to save the requisition again. Finance will remove the Fiscal Year Renewal designation and budget check the requisitions after July 1, when the new Fiscal Year budget is available, and budget check the requisitions. Departments will have to enter each renewal and select Save and Submit once the Fiscal Year Renewal status is removed.

Enter requisition comments	s			
Information attached				
Send to Supplier	Show at Receipt	Shown at Voucher		Edit more Comments and Attachment
Approval Justification				
Enter approval justification	for this requisition			
				Return to Requisition
		Add More Items	6ð Preview Approvals	Request Document
	Save for Later			

19. Scroll to the bottom of the screen and verify the Total amount of the requisition. If correct, select Ship To Confirmation, enter requisition comments, attach documents* using the Add more Comments and Attachments link.

Edit for All Lines Ship To Location Address	2750_0001 2750 VENTURE DRIVE ROOM 0001 NORMAN, OK 73069		Ship To Confirmation			
Attention To Comments	Kimberely J Helton					
Requisition Comments and Attachme	nts					
Send to Supplier	□ Show at Receipt	Shown at Voucher				4
Approval Justification Enter approval justification for this	requisition				Add more Comments and	Attachments
						7
Check Budget				Return	to Requisition	
😼 Save & submit	Save for Later	Add More Items	6ð Preview Approvals	Add Request Docu	ument	

*Please provide the following documents as they apply to each requisition:

- Requisition Entry Form
- Signed Sole Source Form
- Quote
- Contract
- Signed Independent Contractor Form
- IT Risk Assessment
- Data Governance Committee approval
- If a solicitation, please provide:
 - Scope and pricing
 - o Evaluation criteria
 - Evaluation Committee member names
 - A list of at least 3 potential vendors to send the solicitation to consider
- 20. Select the checkboxes by the Send to Supplier, Show at Receipt, and Shown at Voucher. These three options must be selected for the Procurement Specialist to be able to see the comments and documents.

	achments		
Enter requisition comments			
Information attached			1
			4
Send to Supplier	Show at Receipt	Shown at Voucher	Edit more Comments and Attachments
proval Justification			
Enter approval justification f			
Check Budget		Budget Checking Status: <u>Valid</u>	Return to Requisition

 Select Check Budget. A pop up will appear verifying the request to budget check the requisition. Select OK. The Budget Check will show the status of Valid or Error. If valid, select Save & Submit.

			ОК	Cancel	,	our requisition without budget checl	
			Ruden	Chaoling Status Valid		Return to Requisiti	
Che	Check Budget		Budge	Checking Status: Valid			
	Save & submit	Save fo	r Later 🕈	Add More Items 6	Preview Approvals	Add Request Document	

22. A Confirmation Page will appear that displays the Requi	isition Number, and the approval path.
Your requisition has been submitted.	
Requested For Kimberely J Helton	Number of Lines 2
Population Name 0000045885	Total Amount 596.90 USD
Requisition ID 0000015665	Pre-Encumbrance Balance
Dusiness Ont NORIVIN	Not Available
Status Pending	
Priority Medium	
Budget Status Valid	
Siew printable version Let this Requisition	K Budget
Department Manager Approval	
Requisition 0000015665:Pending	
Department Manager Approval	4
Pending Multiple Approvers	
Beq Department Managers	
IT Approvals	
Line 1:Initiated	
Smith-Victor 36" pro-duty copy stand w/LED light KI/REG	
IT Approvals Not Routed	
Multiple Approvers	
Req IT Approvers UL	
Line 2:Initiated	
Vello Wired Remote f/Canon DSLR w/3-PIN II/REG IT Approvals	
Not Routed	
← Multiple Approvers Req IT Approvers UL ←	
Purchasing Approval	
Requisition 0000015665:Awaiting Further Approvals	
22. Once the Dough asian Annual status status and a	
23. Once the Purchasing Approval status states approved, a	-
within the approval box, the requisition is assigned. The	e Contract Specialist will be able to tell
you the status of the contract document.	
Purchasing Approval	
Requisition 0000015665:Awa	iting Eurther Approvals
	iting Further Approvais
Purchasing Approval	
Not Routed Multiple Approvers	
Purchasing Approval	

24.

25. To check the status of a requisition, navigate to Manage Requisitions within eProcurement. Select Clear and then enter the Requisition number in the Requisition ID field. Select Search, and the requisition will display.

€ eProcurement	eProcurement 🔶 🛉 🗄 🕑
Manage Requisitions	New Window Help Personalize Pag Manage Requisitions
Requisition	▼ Search Requisitions
	To locate requisitions, edit the criteria below and click the Search button.
Requester Setup	Business Unit NORMN Q. Requisition Name Q.
	Requisition 1D C Request State All but Complete V Budget Status V
Activity Summary	Date Te 03/20/2022 B Origin Q Org Q
Activity Summary	Requester 477569 Q Entered By Q Supplier Q PO ID Q
Print POs	Search Clear Show Advanced Search
Supplier	Requisitions 👔
	To view the Mespan 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.
	Reg ID Requisition Name BU Date Reguest State Budget Total
	▶ 0000015665 0000015665 NORMN 03/20/2022 Pending Valid 596.90 USD [Select Action] ▼ Go
	U Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

26. Select the triangle by the requisition number. The requisition information displays. Select Approvals to display the approval page.

		in and line items for a requisition, another action on a requisition, r				vn list and click (Go.				
Req ID		Requisition Name	BU	Date	Request State	Budget	Total				
00001	15665	0000015665	NORMN	03/20/2022	Pending	Valid	ł	596.90 US	D [Select Action]	~	(
		ester Kimberely J Helton	En Available	tered By Kir	nberely J Helton	I	Priority Medium				
	*			4	2			- Ali		Egi	
	equisitio		Inventory		rchase Irders	Change Request	Receiving	Returns	Invoice	Payment	-
Request Line II							Personaliz	e Find	🍠 🔜 🛛 First 🕢 1-2	2 of 2 🕟	Las
Line		Description	Status		Price	Currency	Quantity	UOM	Supplier		
1	P	Smith-Victor 36" pro-duty co	Pendir	ng Approval	292.49	USD	2.00		3&H PHOTO-VIDEO-PRO- AUDIO	×	
2	2	Vello Wired Remote f/Canon D	. Pendir	ng Approval	5.96	USD	2.00		3&H PHOTO-VIDEO-PRO- AUDIO	×	

Create New Requisition

Review Change Request

Review Change Tracking

Requisition Report

Manage Receipts