

# Peoplesoft Requisition Entry

1. Log in to the Peoplesoft Financials link located at [compass.ou.edu](https://compass.ou.edu) under PeopleSoft Production Financials Environments, or through this link: [Oracle PeopleSoft Sign-in \(ou.edu\)](#).



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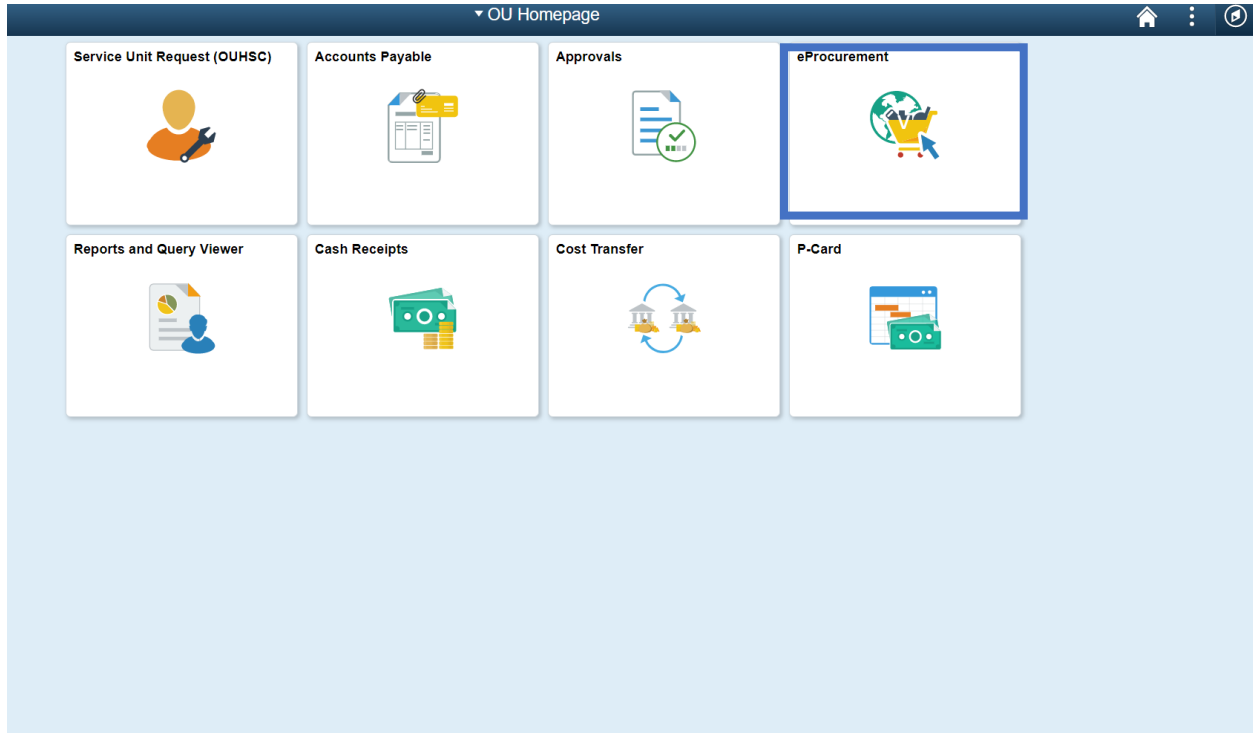
Built and Managed by  
OU IT Web Services

HEL0009 ? LOGOUT

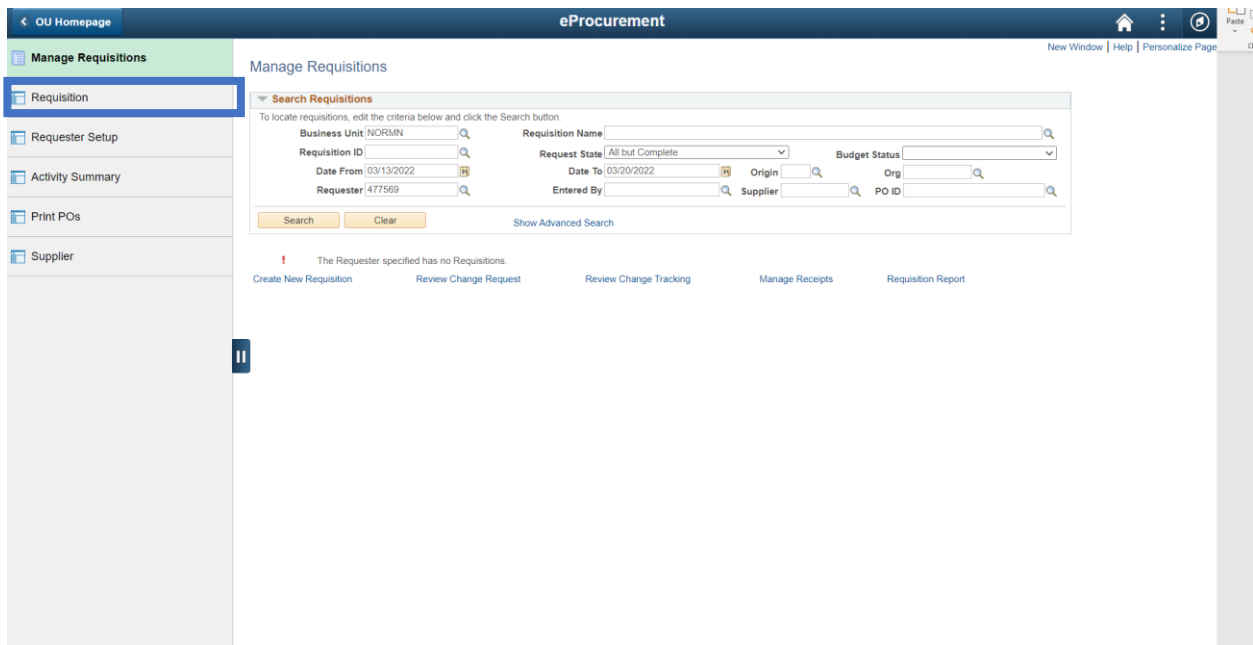
2. The log in page display.

The Oracle PeopleSoft login page features a dark blue background. At the top center is the Oracle PeopleSoft logo. Below it are two white input fields for 'User ID' and 'Password'. A 'Select a Language' dropdown menu is set to 'English'. A green 'Sign In' button is positioned below the fields. A checkbox for 'Enable Screen Reader Mode' is located at the bottom of the form area. The footer contains the text 'Copyright © 2000, 2018, Oracle and/or its affiliates. All rights reserved.'

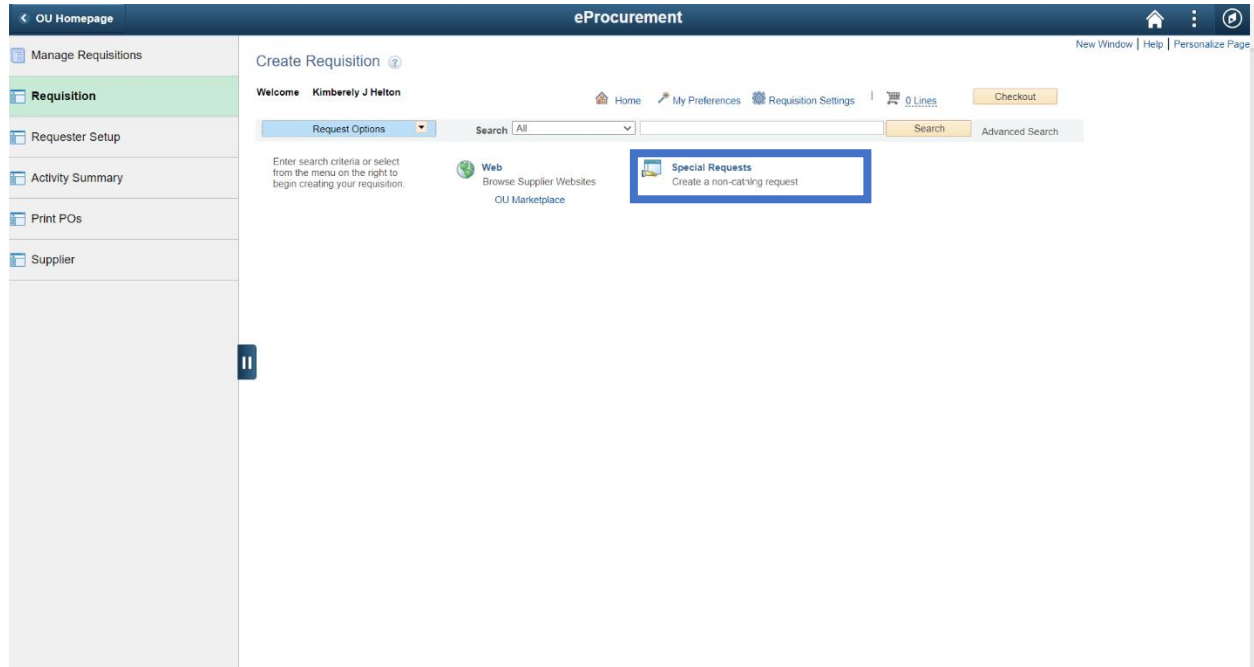
3. Once logged in, select the eProcurement tile.



4. Select Requisition on the left navigation.



5. Select the Special Request link.



6. For each item or service, you will add a separate line to the requisition. To add a line, enter a 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 requisition 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 (402182)	292.49	584.98
2		VELLO WIRED REMOTE f/CANON DSLR w/3-PIN II/REG	VERSC2II (RSC2II)	5.96	11.92

- 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.

The screenshot shows the 'Create Requisition' page. The 'Special Requests' section is highlighted with a blue box. The fields within this section are:
 

- \*Item Description: Smith-Victor 36" pro-duty copy stand w/LED light KI/REG
- \*Price: 292.49
- \*Quantity: 2.00
- \*Category: 660400
- \*Supplier ID: 9100035226
- \*Supplier Name: (empty)

 A 'Look Up Unit of Measure' dialog box is open on the right, showing search results for 'Ea' and 'Lot'. The 'Additional Information' section has three checked checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add to Cart' button is at the bottom.

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: 9188888888.

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.

8. Now add the second line item. The Supplier ID and Supplier Name stay in the request. The notification checkboxes also remain checked.

Select Add to Cart once the second item information is entered. Then select Checkout.

Create Requisition [?](#) New Window | Help | Personalize Page

Welcome **Kimberely J Helton** [Home](#) [My Preferences](#) [Requisition Settings](#) | [1 Line](#) [Checkout](#)

Request Options Search  [Search](#) [Advanced Search](#)

**Special Requests** [?](#)  
Enter information about the non-catalog item you would like to order.

**Item Details**

\*Item Description   
\*Price  \*Currency   
\*Quantity  \*Unit of Measure   
\*Category  Due Date

**Supplier**

\*Supplier ID   
Supplier Name

Additional Information

Send to Supplier  Show at Receipt  Show at Voucher

[Add to Cart](#)

9. Name the requisition. This can be the supplier name, or the service being received. Make it something that will be meaningful to you if you need to look up the requisition later.

Checkout - Review and Submit New Window | Help | Personalize Page

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

**Requisition Summary**

Business Unit   **Requisition Name**

\*Requester

\*Currency

**Cart Summary: Total Amount 596.90 USD**

Expand lines to review shipping and accounting details [Add More Items](#)

**Requisition Lines** [?](#)

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	D
<input type="checkbox"/> 1	<a href="#">Smith-Vector 36" pro-duty copy</a>	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	292.4900	584.98	<a href="#">Details</a>	<a href="#">Edit</a>	<a href="#">D</a>
<input type="checkbox"/> 2	<a href="#">Vello Wired Remote f/Canon DSL</a>	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	5.9600	11.92	<a href="#">Details</a>	<a href="#">Add</a>	<a href="#">D</a>

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

**Total Amount** 596.90 USD

**Shipping Summary**

[Edit for All Lines](#)

Ship To Location  Ship To Confirmation  
Address  SAME AS SHIPPING  
Attention To   
Comments

**Requisition Comments and Attachments**

## 10. Next select the small triangle on each line.

### Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

#### Requisition Summary

Business Unit   Requisition Name

\*Requester   Priority

\*Currency

[Custom Fields](#)

#### Cart Summary: Total Amount 696.90 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

#### Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	D
<input type="checkbox"/> 1	Smith-Victor 36" pro-duty copy	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	292.4900	584.98		Edit	
<input type="checkbox"/> 2	Vello Wired Remote f/Canon DSL	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	5.9600	11.92		Add	

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

**Total Amount**      596.90 USD

#### Shipping Summary

[Edit for All Lines](#)

Ship To Location   Ship To Confirmation

Address

Attention To

Comments

#### Requisition Comments and Attachments

## 11. Change the Ship To address from Default to the location the item or service will be provided.

#### Cart Summary: Total Amount 596.90 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

#### Requisition Lines

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	D
<input type="checkbox"/> 1	Smith-Victor 36" pro-duty copy	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	292.4900	584.98		Edit	
<b>Shipping Line 1</b>									
			<input type="text" value="2.0000"/>		<input type="text" value="292.4900"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="292.4900"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="292.4900"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="292.4900"/>				
<b>Accounting Lines</b>									
<input type="checkbox"/> 2	Vello Wired Remote f/Canon DSL	B&H PHOTO-VIDEO-PRO-AUDIO	<input type="text" value="2.0000"/>	Each	5.9600	11.92		Add	
<b>Shipping Line 1</b>									
			<input type="text" value="2.0000"/>		<input type="text" value="5.9600"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="5.9600"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="5.9600"/>				
			<input type="text" value="2.0000"/>		<input type="text" value="5.9600"/>				
<b>Accounting Lines</b>									

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

**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.

The screenshot shows the Accounting Lines interface. At the top, there are fields for Ship To (2750\_0001), Address (2750 VENTURE DRIVE, ROOM 0001, NORMAN, OK 73069), Attention To (Kimberely J Helton), and Due Date. Below this is the Accounting Lines section with a dropdown menu for \*Distribute By (Qty) and a SpeedChart field. The main table has columns for Line, Status, Dist Type, \*Billing Location, Quantity, Percent, Merchandise Amt, GL Unit, and Entry Event. A 'Personalize | Find' button is highlighted. Below the table is a 'Grid Customization' panel with a 'Column Order' list. 'Dist Type (hidden)' is selected in the list, and the 'Hide' checkbox is checked. The main table now shows the \*Billing Location field populated with '2750\_0001'.

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.

The screenshot shows the Accounting Lines interface with the \*Distribute By field set to Qty. The main table has columns for Account, Fund, Org, Function, Entity, Source, Purpose, PC Bus Unit, Project, and Activity. The Account field is populated with '660400' and the Fund field with 'EDGEN'. Below the table are buttons for 'Select lines to:', 'Add to Favorites', 'Add to Template(s)', 'Delete Selected', and 'Mass Change'.

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.

The screenshot shows the 'Requisition Lines' interface. On the left, a list of lines is shown with checkboxes. Line 1 is selected. The 'Mass Change' button is highlighted in blue. Below it, a pop-up window titled 'Edit Lines/Shipping/Accounting for Selected Lines' is open. The pop-up has several sections: 'Line Information' with a note, 'Supplier Information' with fields for Supplier ID, Supplier Location, Buyer, and Category; 'Shipping Information' with fields for Ship To Location, Due Date, and Attention; and 'Accounting Lines' with a SpeedChart field and an 'Accounting Information' table. The 'Accounting Information' table has columns for Dist, Percent, Location, GL Unit, Account, Fund, Org, and Function. The 'OK' button at the bottom left of the pop-up is highlighted in blue.

15. A pop up appears verifying how to make the changes. For this example, the All Distribution Lines is selected. Select OK.

The screenshot shows the 'Distribution Change Options' pop-up window. It has a title bar with a close button and a 'Help' link. The main content area contains the following text: 'For the selected requisition lines that are available for sourcing, apply distribution changes to'. Below this are three radio button options:
 

- 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 numbers.
- Replace Distribution Lines**  
Remove the existing distribution lines and replace with the distribution lines changes.

 At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted in blue.





## Fiscal Year Renewal Process



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

Cart Summary: Total Amount 596.90 USD

Expand lines to review shipping and accounting details + Add More Items

**Requisition Lines** ?

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	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	Add Shipto Comments	Quantity: 2.0000	Price: 292.4900		Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields	
Address Attention To: SAME AS SHIPPING Kimberely J Helton		Due Date:						
Accounting Lines								
2	Vello Wired Remote f/Canon DSL	B&H PHOTO-VIDEO-PRO-AUDIO	2.0000	Each	5.9600	11.92		Add
Shipping Line 1		*Ship To: DEFAULT	Add Shipto Comments	Quantity: 2.0000	Price: 5.9600		Price Adjustment Pegging Inquiry Pegging Workbench Custom Fields	
Address Attention To: SAME AS SHIPPING Kimberely J Helton		Due Date:						
Accounting Lines								

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

Total Amount 596.90 USD

### 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.

Select OK to apply the status.

**Line Details**

Line Details ?

No Image Line 1 Smith-Victor 36" pro-duty copy Line Status Open

**Item Details** ?

Merchandise Amount 584.98 USD

Category 660400

Original Substituted Item Description

Physical Nature Goods

Buyer 477569  
Buyer Information  
Configuration Info

Waiting on Bid  
 Device Tracking  
 Fiscal Year Renewal  
 Amount Only  
 Inspection Required

**Contract Information** ?

Use Contract If Available

Contract ID

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.

**Requisition Comments and Attachments**

Enter requisition comments

Information attached

Send to Supplier     Show at Receipt     Shown at Voucher

[Edit more Comments and Attachments](#)

**Approval Justification**

Enter approval justification for this requisition

[Return to Requisition](#)

[Save for Later](#)    [Add More Items](#)    [Preview Approvals](#)    [Add Request Document](#)

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.

**Total Amount** 596.90 USD

**Shipping Summary**

[Edit for All Lines](#)

**Ship To Location** 2750\_0001     [Ship To Confirmation](#)

**Address** 2750 VENTURE DRIVE  
ROOM 0001  
NORMAN, OK 73069

**Attention To** Kimberely J Helton

**Comments**

**Requisition Comments and Attachments**

Enter requisition comments

Send to Supplier     Show at Receipt     Shown at Voucher

[Add more Comments and Attachments](#)

**Approval Justification**

Enter approval justification for this requisition

[Return to Requisition](#)

[Check Budget](#)

[Save & submit](#)    [Save for Later](#)    [Add More Items](#)    [Preview Approvals](#)    [Add Request Document](#)

\*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
  - 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.

Requisition Comments and Attachments

Enter requisition comments

Information attached

Send to Supplier     Show at Receipt     Shown at Voucher    [Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

Check Budget    Budget Checking Status: **Valid**    [Return to Requisition](#)

21. 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.

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.

Check Budget    Budget Checking Status: **Valid**    [Return to Requisition](#)

22. A Confirmation Page will appear that displays the Requisition Number, and the approval path.

Your requisition has been submitted.

<b>Requested For</b> Kimberely J Helton	<b>Number of Lines</b> 2
<b>Requisition Name</b> 0000015665	<b>Total Amount</b> 596.90 USD
<b>Requisition ID</b> 0000015665	<b>Pre-Encumbrance Balance</b> Not Available
<b>Business Unit</b> NORMIN	
<b>Status</b> Pending	
<b>Priority</b> Medium	
<b>Budget Status</b> Valid	

View printable version    Edit This Requisition    Check Budget

### Department Manager Approval

▼ **Requisition 0000015665:Pending**

Department Manager Approval

**Pending**

Multiple Approvers  
Req 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**

23. Once the Purchasing Approval status states approved, and there is a Contract Specialist's name within the approval box, the requisition is assigned. The Contract Specialist will be able to tell you the status of the contract document.

### Purchasing Approval

▼ **Requisition 0000015665:Awaiting Further Approvals**

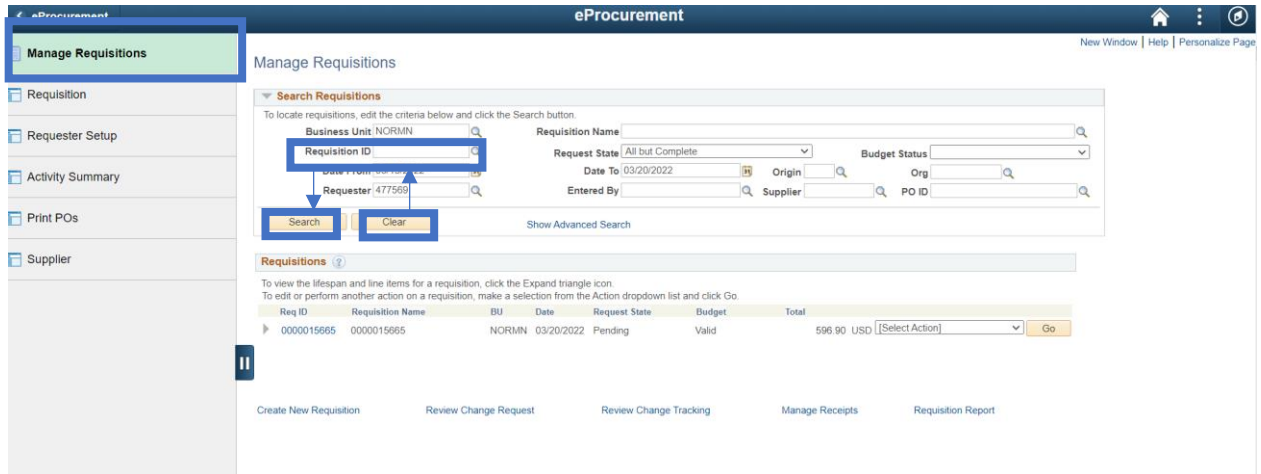
Purchasing Approval

**Not Routed**

Multiple Approvers  
Purchasing Approval

# Requisition Status

- 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.



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

