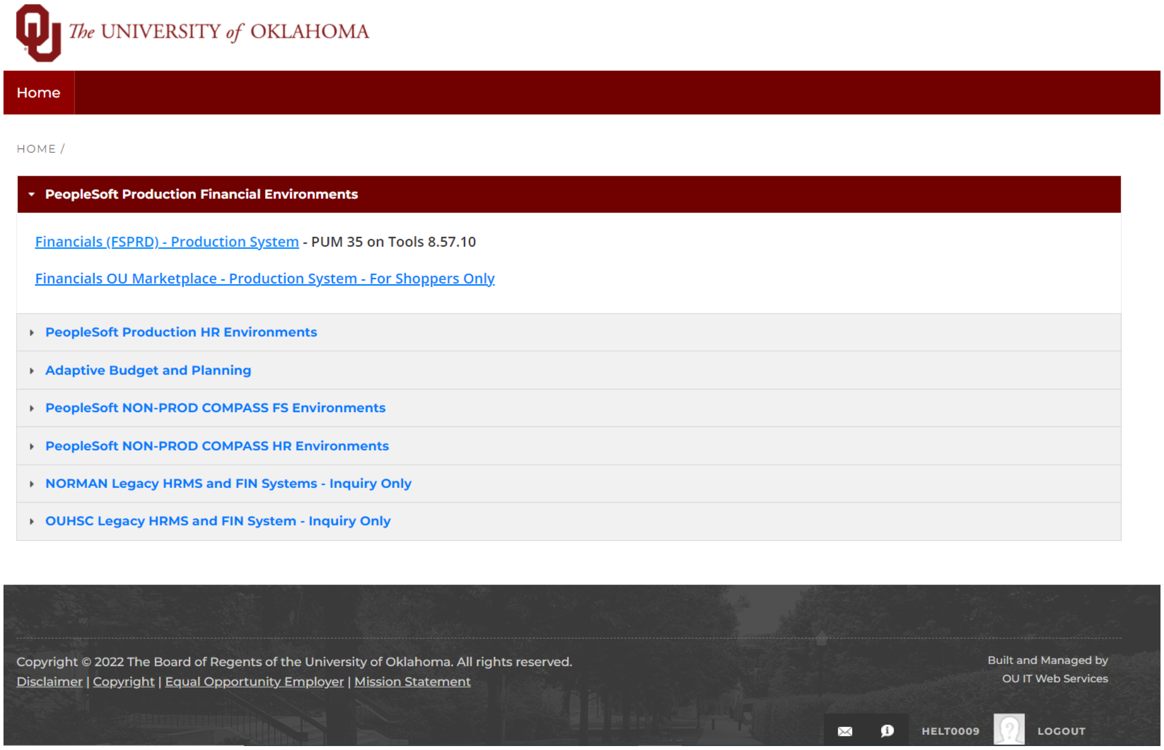
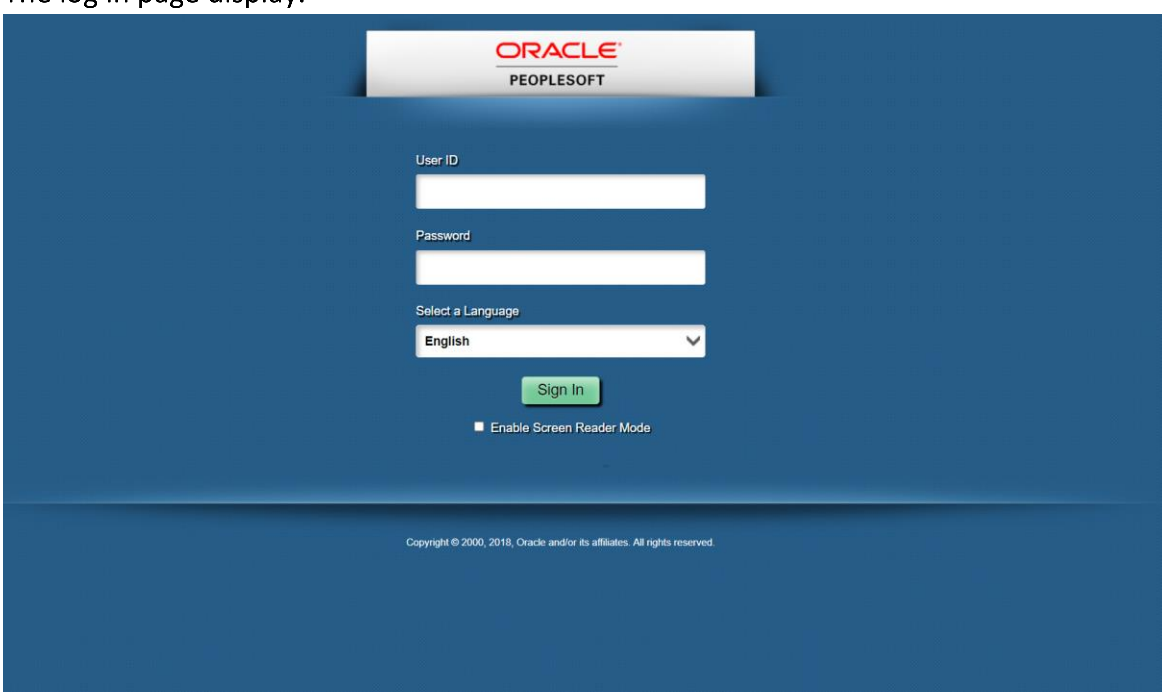
Peoplesoft Requisition Entry

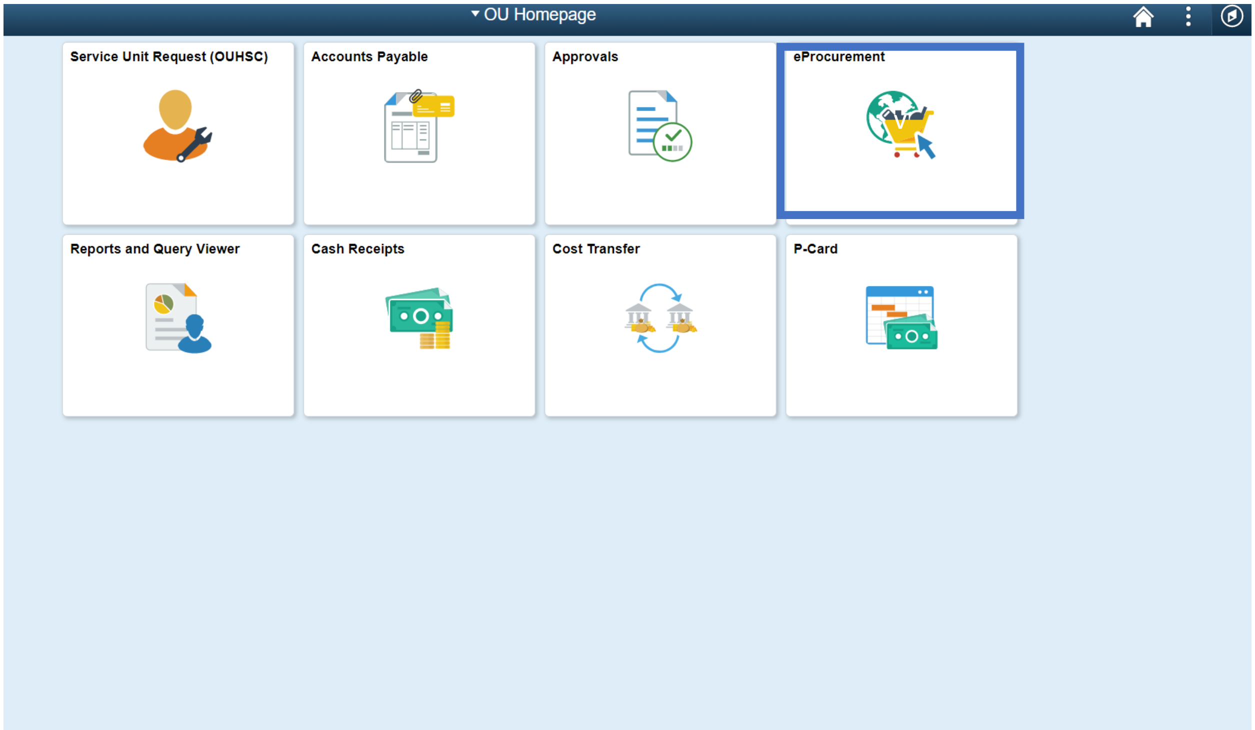
1. Log in to the Peoplesoft Financials link located at compass.ou.edu under PeopleSoft Production Financials Environments, or through this link: [Oracle PeopleSoft Sign-in (ou.edu)](#).



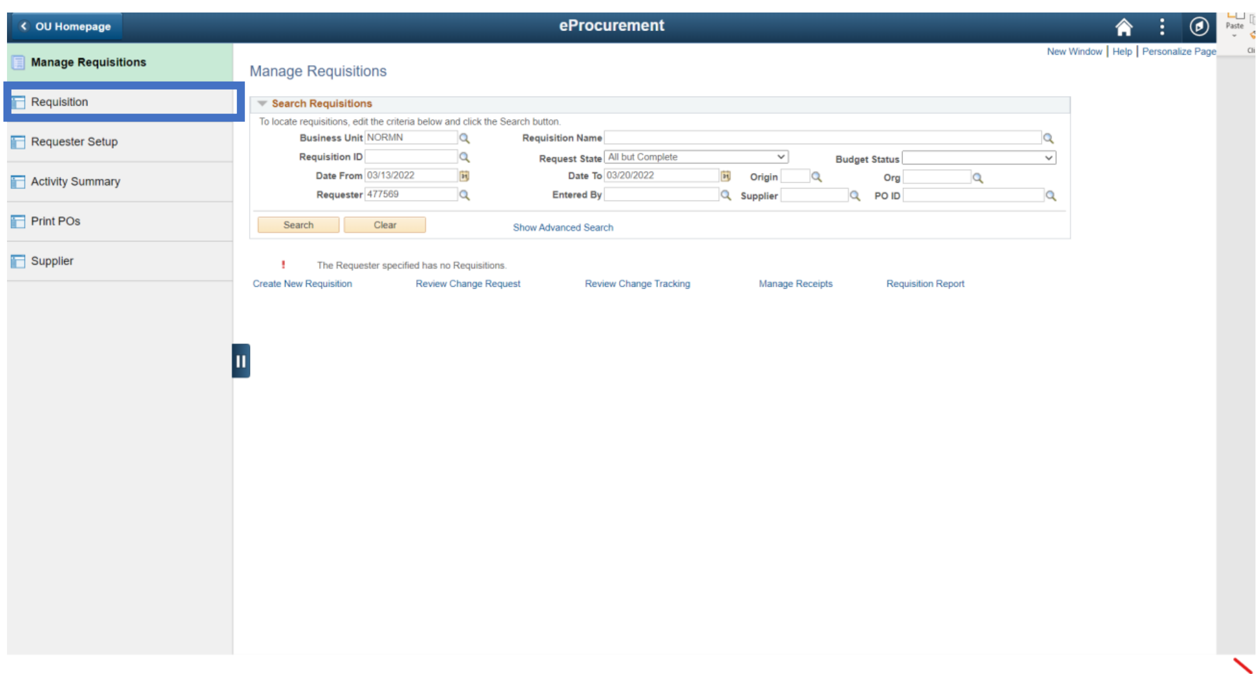
2. The log in page display.



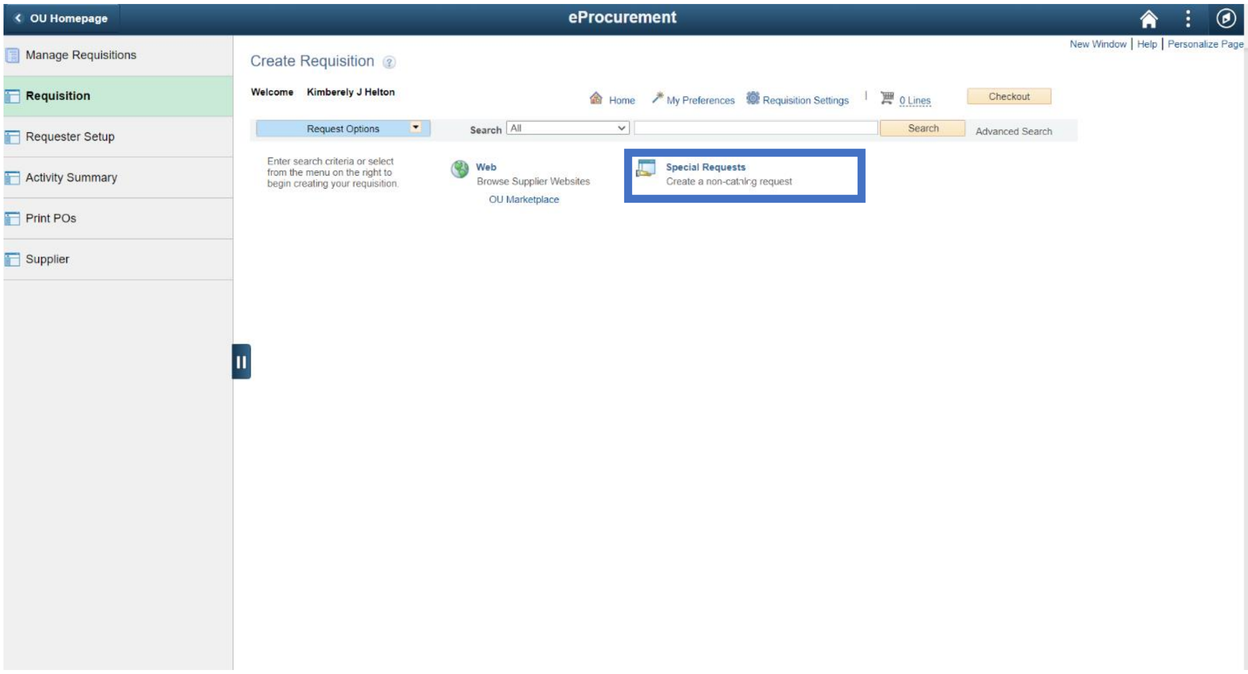
3. Once logged in, select the eProcurement tile.



4. Select Requisition on the left navigation.



5. Select the Special Request link.

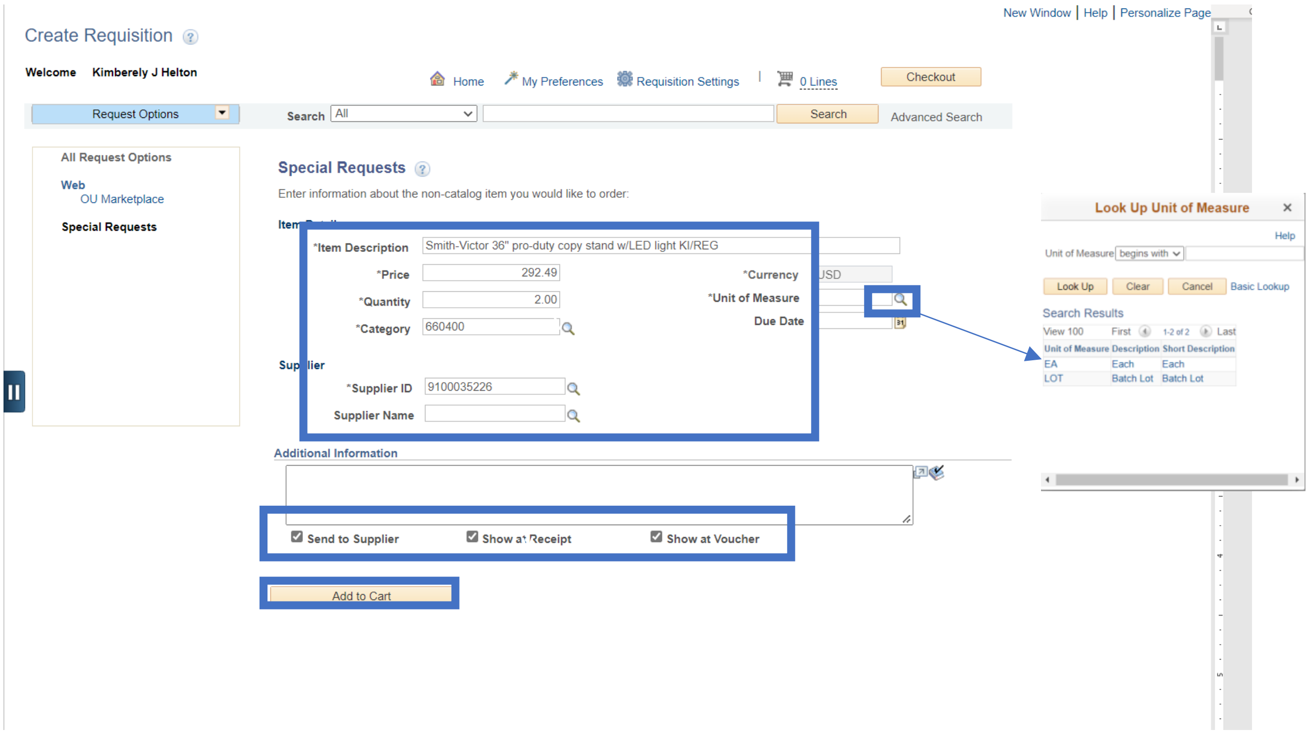


6. For each item or service, you will add a separate line to the requisition. To add a line, enter a description of the item or service. If buying items, the Item Description must match the description on the quote. The quote below shall be used as an example to create a requisiton for items.

   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 (402182)	292.49	584.98
2	VELLO WIRED REMOTE f/CANON DSLR w/3-PIN II/REG	VERSC2II (RSC2II)	5.96	11.92

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.



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.

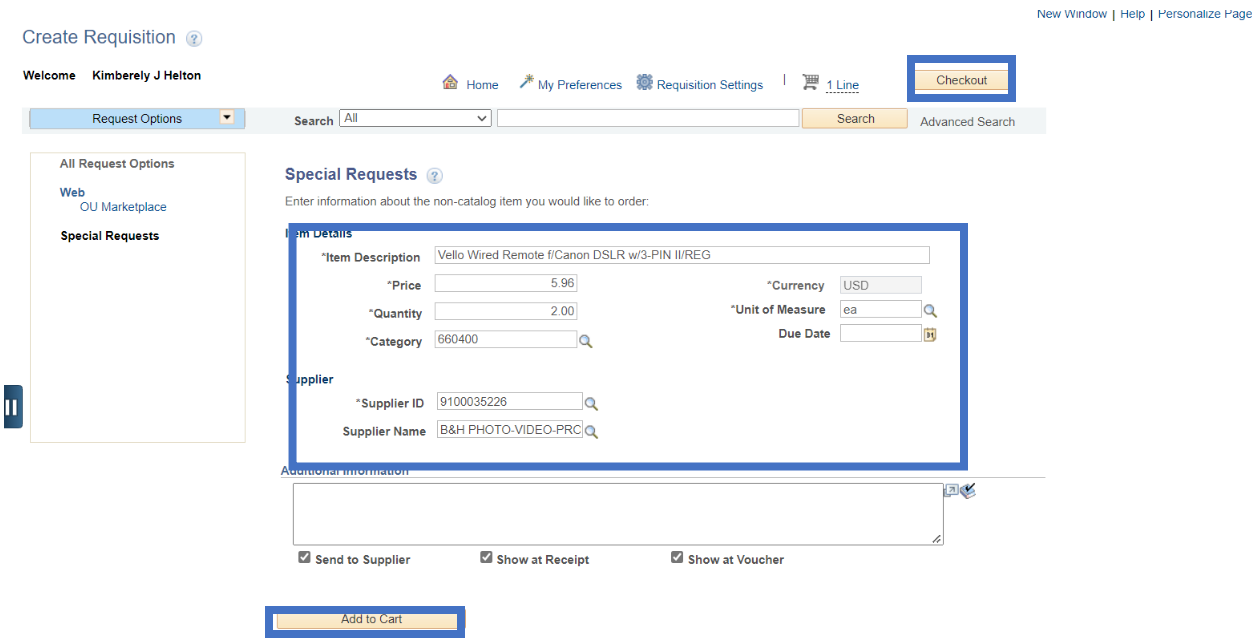
This ID can be updated in the requisition later by the Requestor. Procurement will not source a Purchase Order to a Best Source supplier ID.

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.

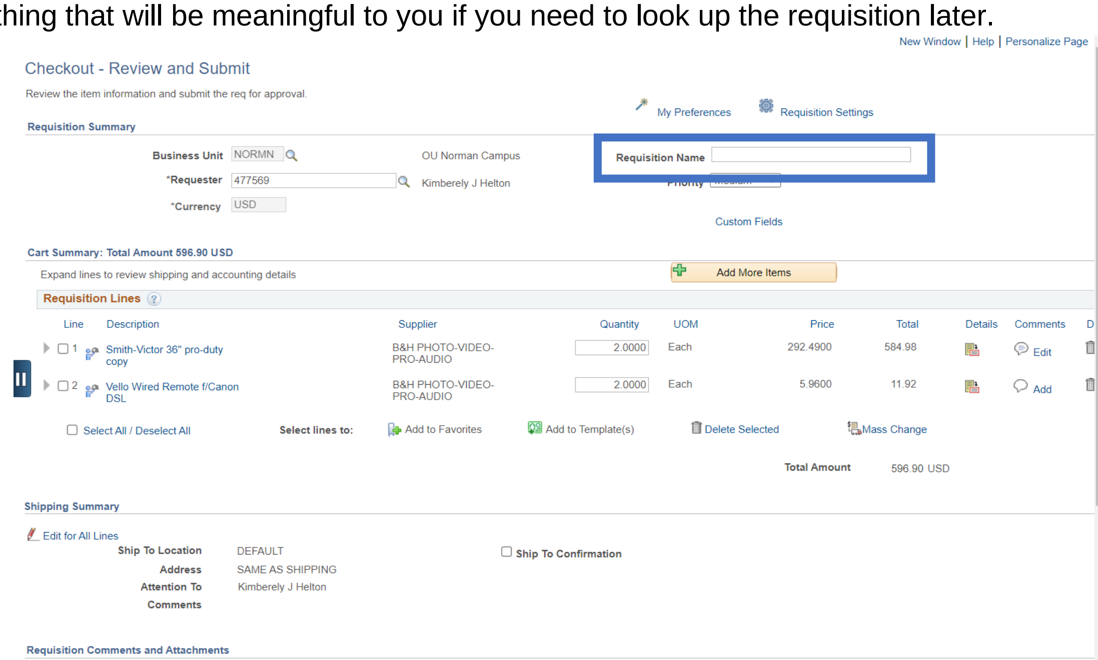
Select Add to Cart.

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

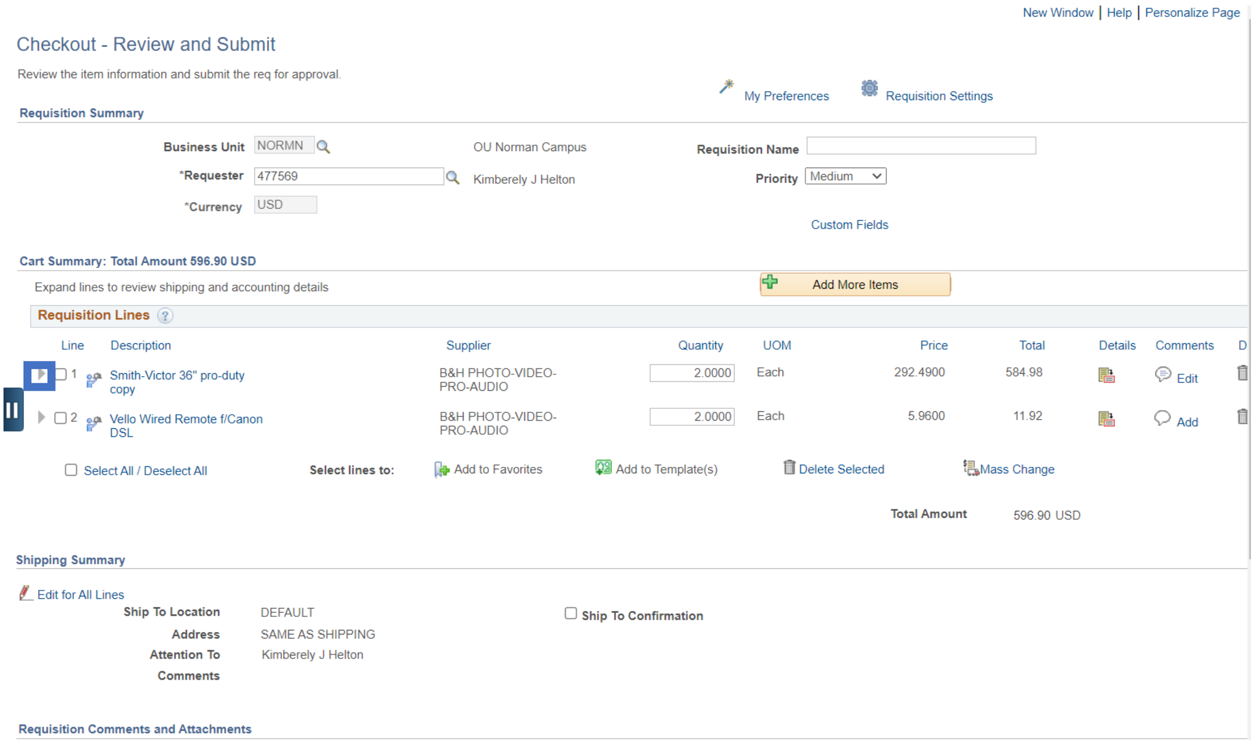
   Select Add to Cart once the second item information is entered. Then select Checkout.



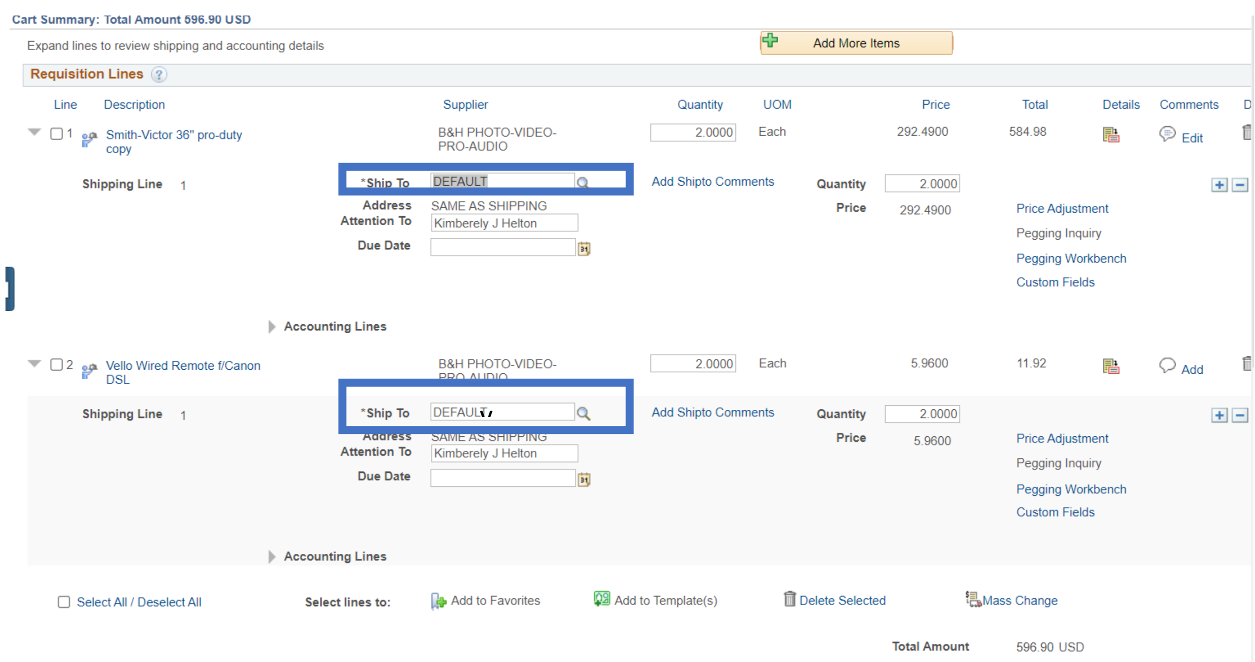
9. Name the requisition. This can be the supplier name, or the service being received. Make it something that will be meaningful to you if you need to look up the requisition later.



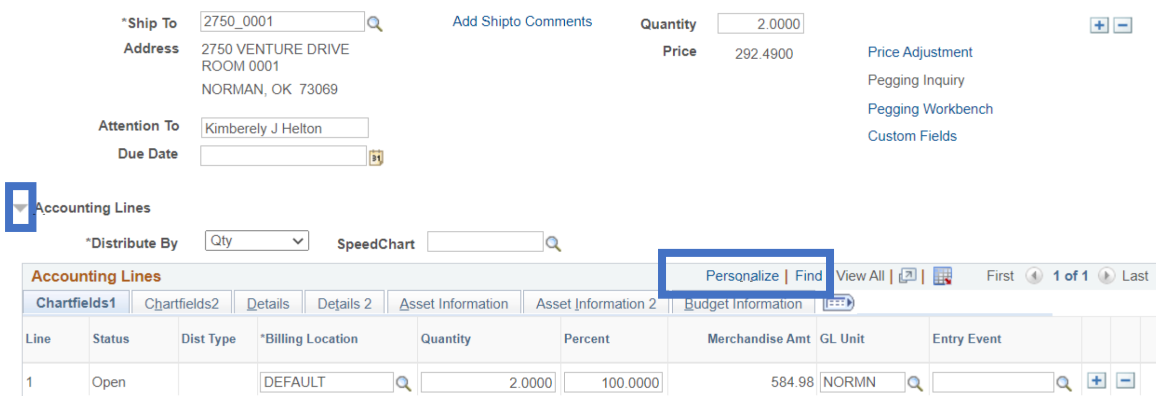
10. Next select the small triangle on each line.

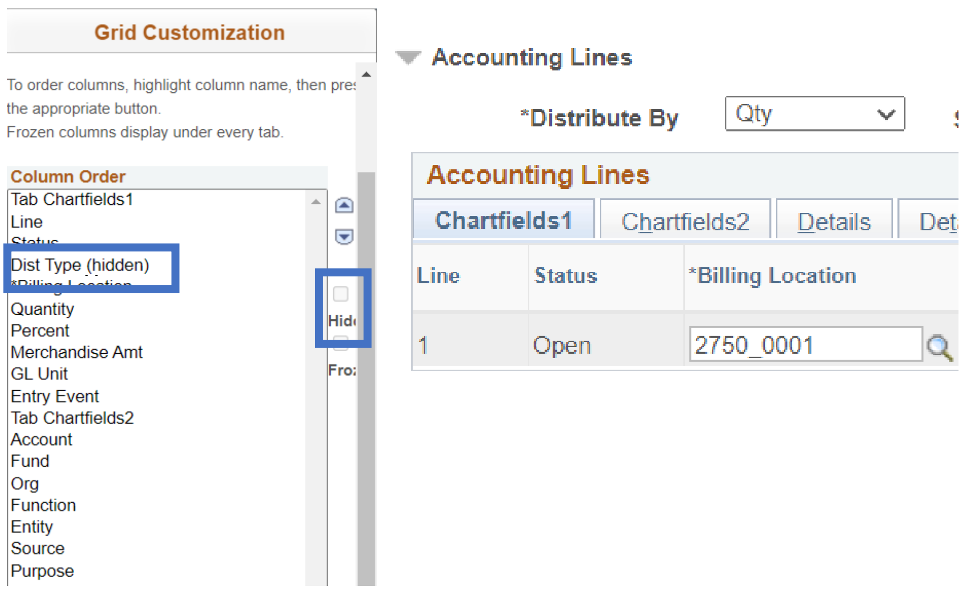


11. Change the Ship To address from Default to the location the item or service will be provided.

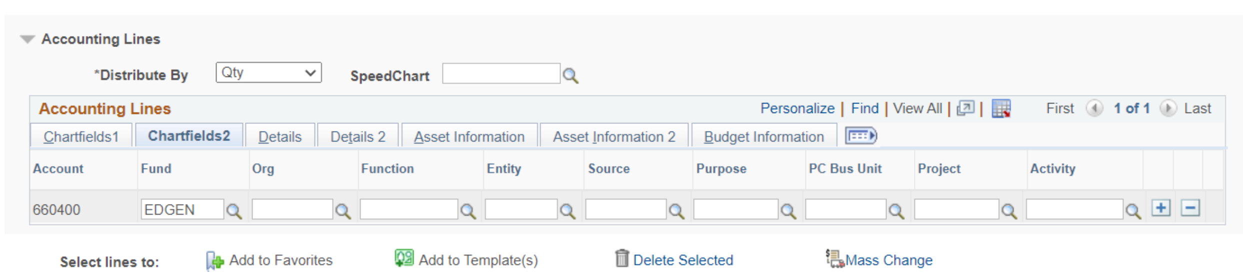


12. Select the triangle beside the Accounting Lines. You may personalize how these chart fields display. For example, select Personalize, select the Dist Type and then select Hide. Scroll down to the bottom of the pop out and select OK. This field will no longer display.

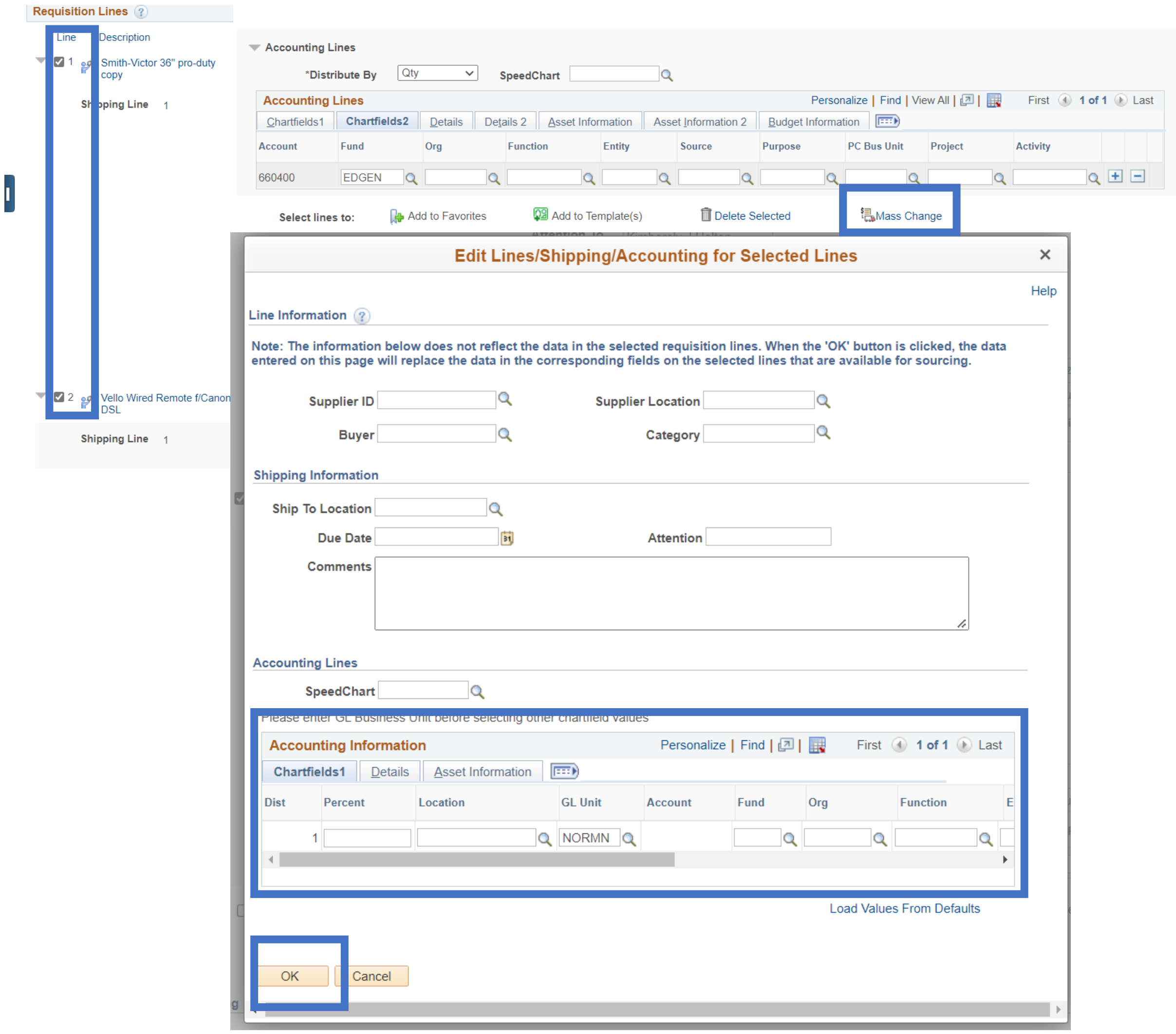




13. Fill in your Department's accounting codes and the GL code specific to each line. If you are unsure what codes should be used in the Accounting Lines, please contact Finance.

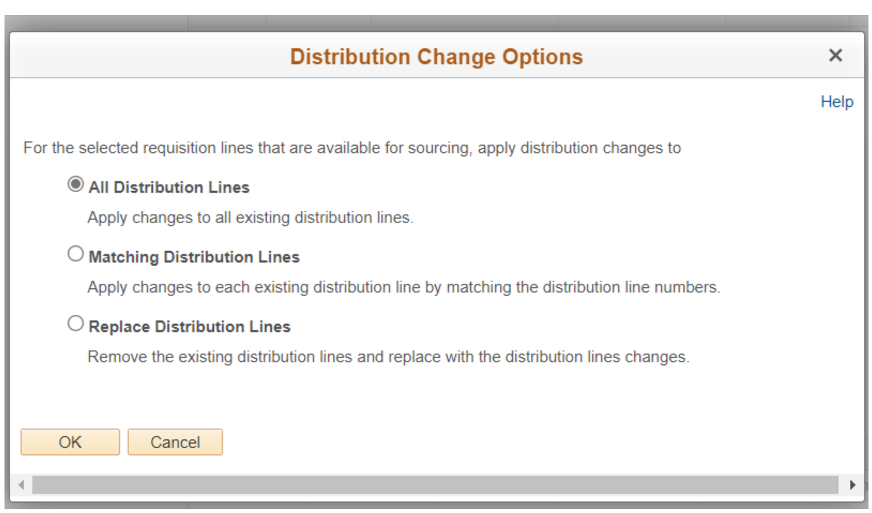


14. If you have multiple lines that have the same accounting. Select the lines the information will apply to, and then select the Mass Change link. Enter the accounting information and then select OK.

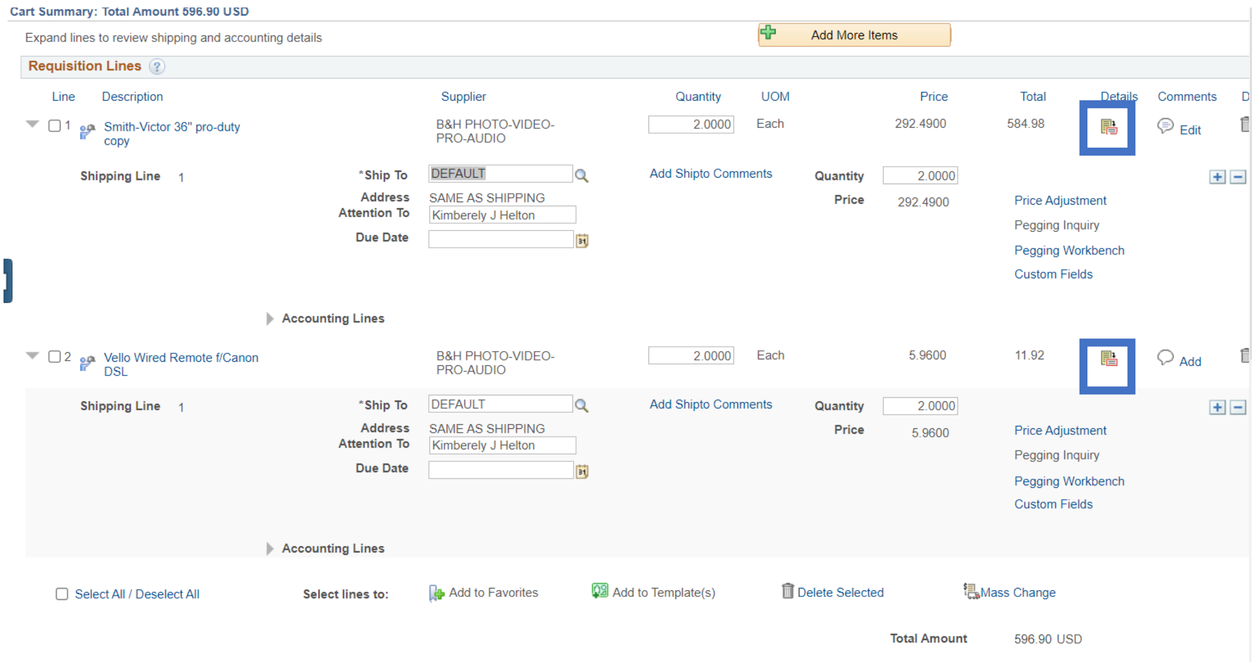


15. A pop up appears verifying how to make the changes. For this example, the All Distribution Lines is selected.

Select OK.

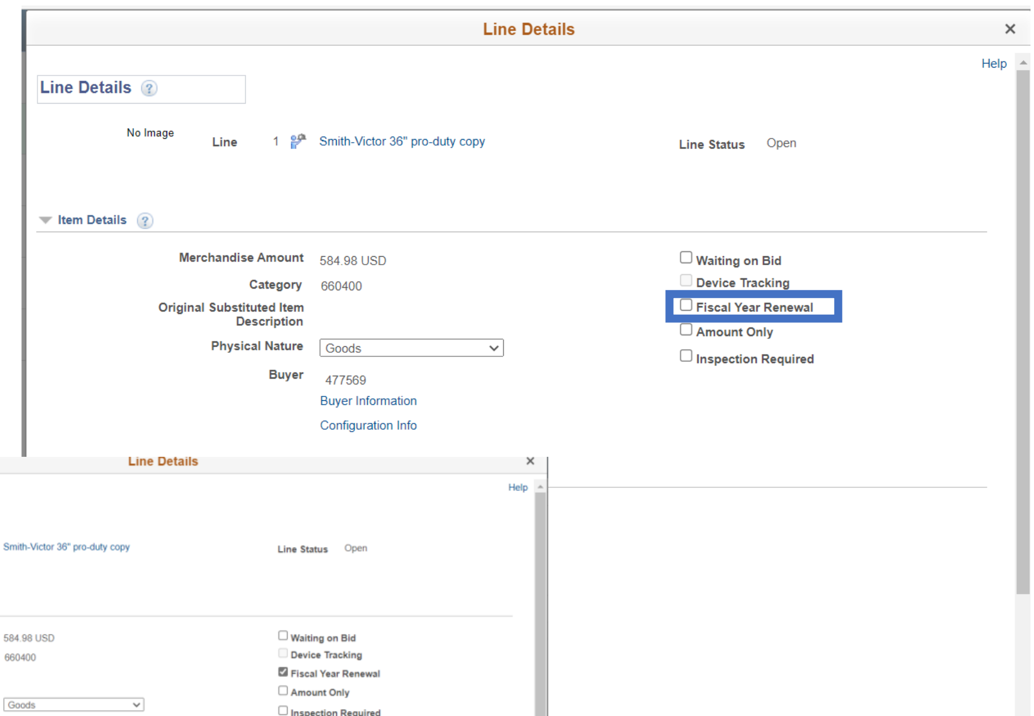


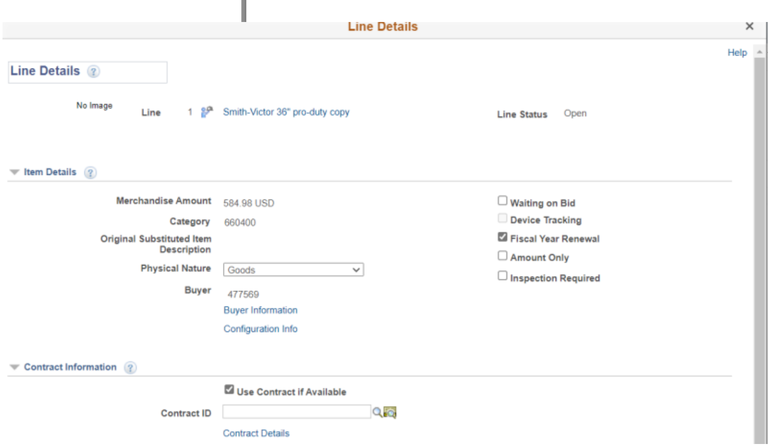
16. If the requisition is requesting a renewal to be effective July 1, select the Line Details.



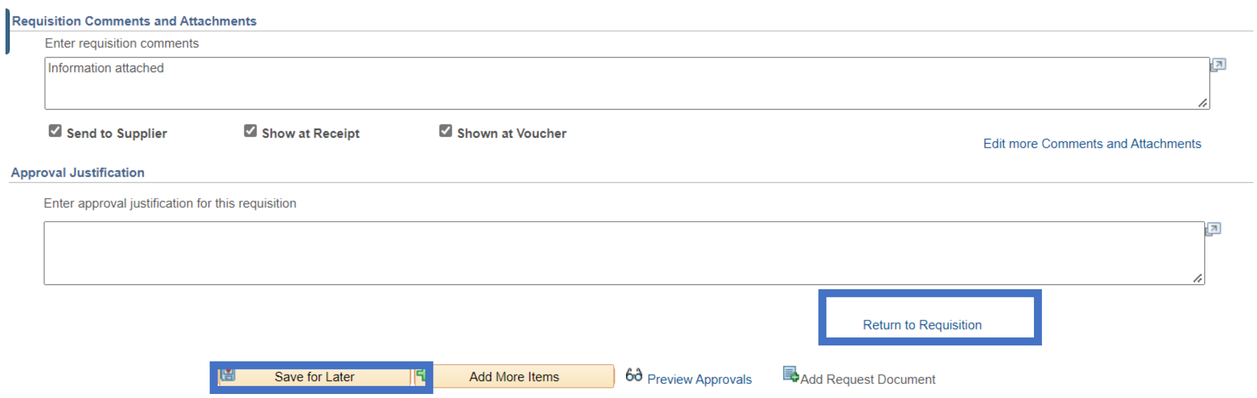
17. Select the Fiscal Year Renewal option. This will prevent the requisition from budget checking and will be used to update Fiscal Year renewals each July 1. This option is only available for a specific time.

Select OK to apply the status.

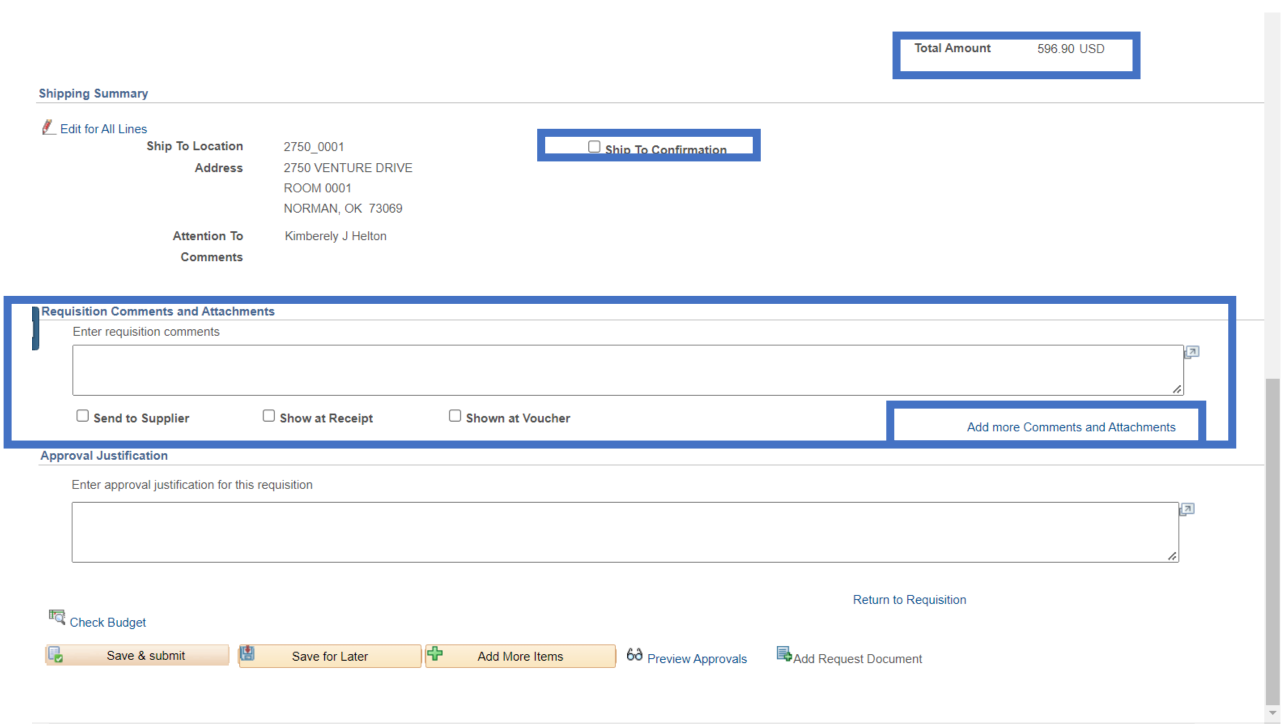




18. 1.The option to budget check the requisition is removed when the Fiscal Year Renewal option is selected. Select Save for Later, and then select Return to Requisition to exit the requisition. Otherwise the requisition will ask to save the requisition again. Finance will remove the Fiscal Year Renewal 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.



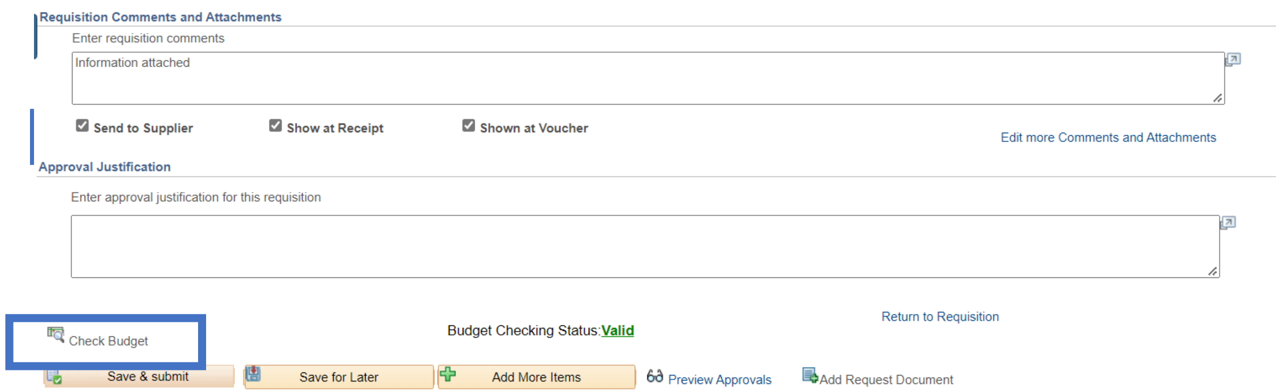
19. Scroll to the bottom of the screen and verify the Total amount of the requisition. If correct, select Ship To Confirmation, enter requisition comments, attach documents* using the Add more Comments and Attachments link.



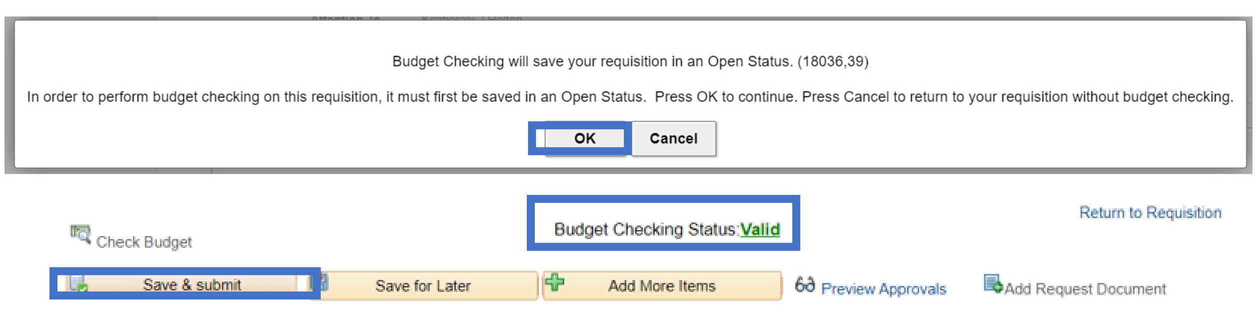
*Please provide the following documents as they apply to each requisition:

- 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

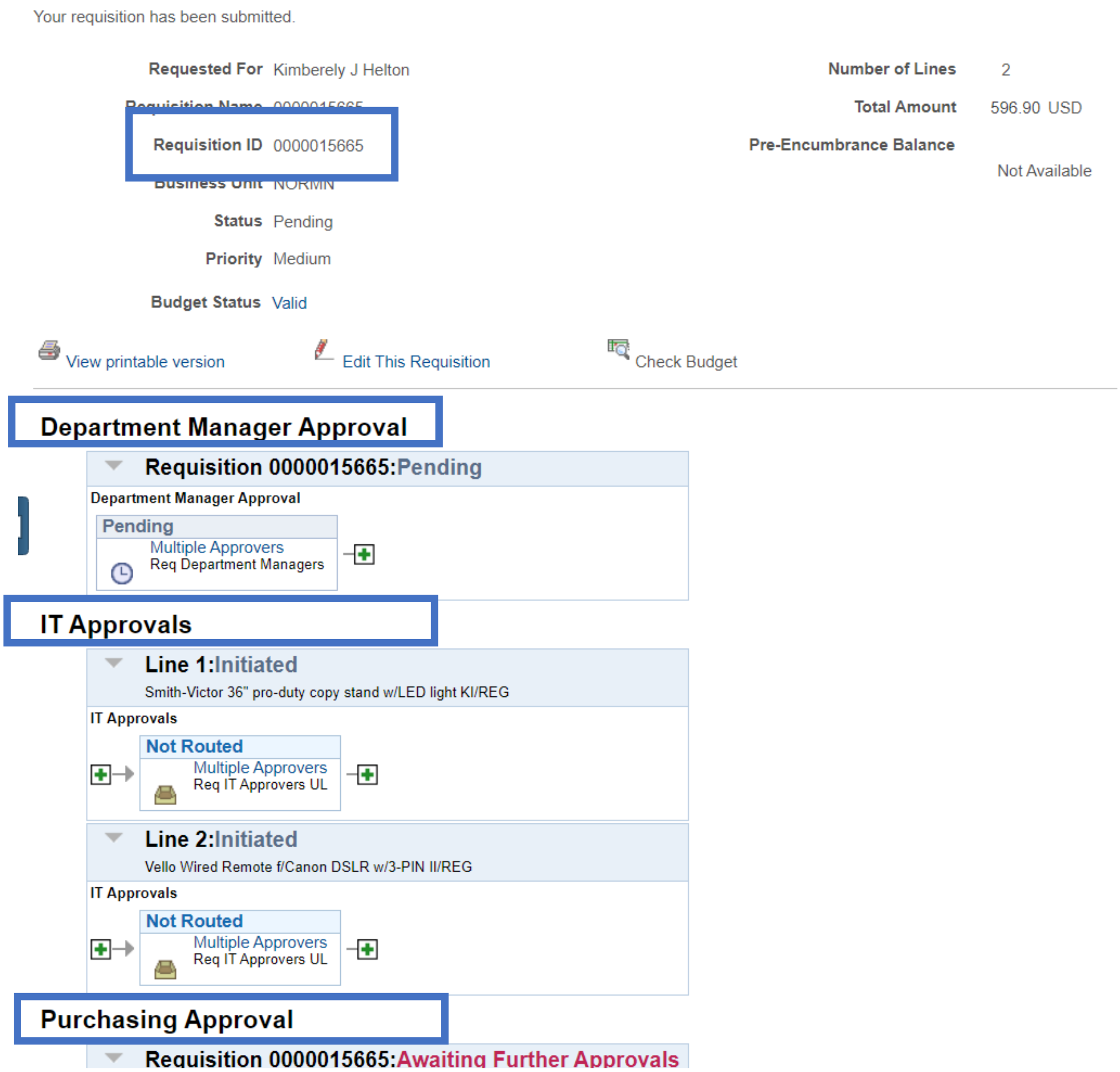
20. Select the checkboxes by the Send to Supplier, Show at Receipt, and Shown at Voucher. These three options must be selected for the Procurement Specialist to be able to see the comments and documents.



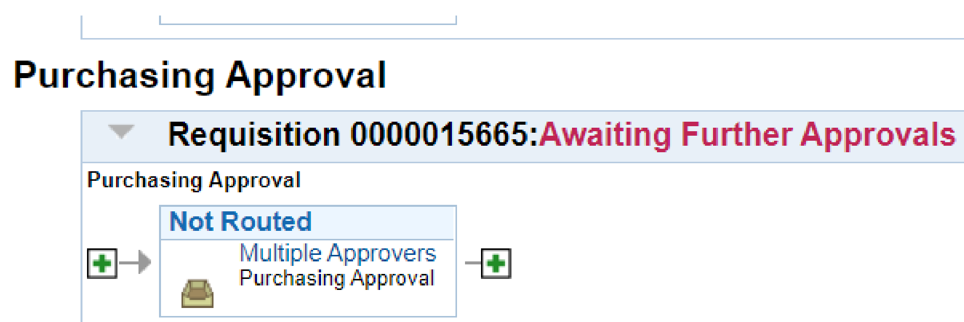
21. Select Check Budget. A pop up will appear verifying the request to budget check the requisition. Select OK. The Budget Check will show the status of Valid or Error. If valid, select Save & Submit.



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



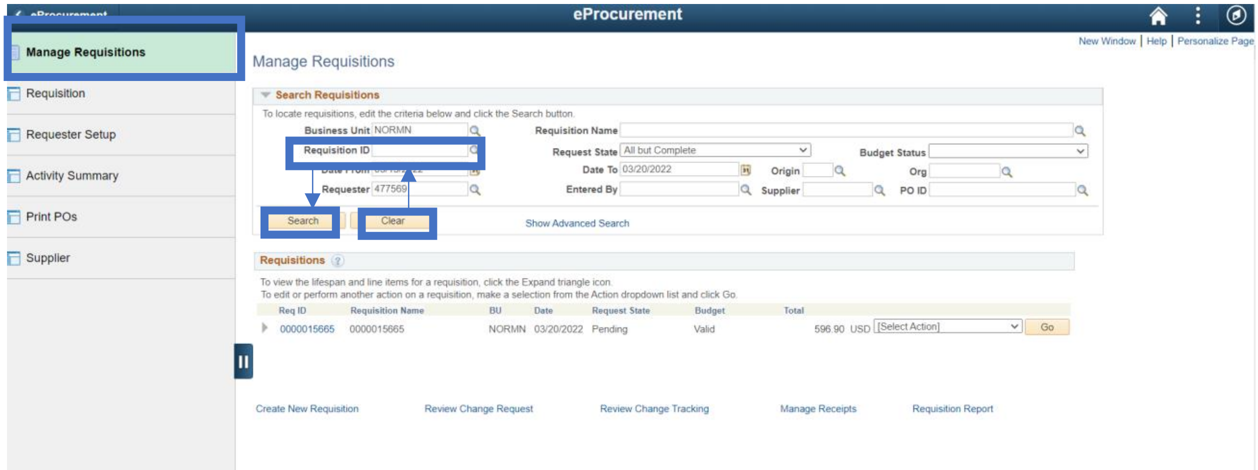
23. Once the Purchasing Approval status states approved, and there is a Contract Specialist's name within the approval box, the requisition is assigned. The Contract Specialist will be able to tell you the status of the contract document.



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.