THE UNIVERSITY OF

OKLAHOMA

Norman Campus

PeopleSoft Upgrade 9.0

Requisition Entry

&

Approver Training
Table of Contents

9.0 Training Material

- Link to PS Financials 3
- Requisition Entry in eProcurement 4
- Using Favorites or Templates 7
- Splitting Chartfield’s 10
- Reviewing Requisition Activity 13
- Receiving Items 14
- Approval Process 16
- Printing from Process Monitor 20
Link to PeopleSoft Financials Production Database

https://fin.ou.edu

If you have changed your network password since June 12, 2009 you may now sign on to PeopleSoft Applications with your OU NEID and password. If you have not changed your password, please visit http://support.ou.edu and change your password before logging on.

Other Links
Click Here for PeopleSoft News
Link to FARS Database
Link to PME Database
Steps to Entering ePro Requisition

A requisition is a formal request for an item that is used to generate a purchase order (PO). A requisition is identified by a requisition ID that is unique to facilitate tracking all requests through the system. A requisition consists of a header and one or more lines.

The following chart lists the steps for entering an online requisition:

From the main menu, select eProcurement ➔ Create Requisition

NOTE: Requisition Name: If desired you can enter a unique requisition name. System will still assign requisition ID number.

1. Define Requisition
   Click ▼ to expand Line Defaults
Click to identify vendor (if vendor unknown or not in system use Best Source Vendor #0000019344

* Enter requested due date

**Accounting Defaults**

Chartfields Tab 1 click under **account** to identify account code.

Chartfields Tab 2 click under **dept number** to select department number.

*Click Continue*

**NOTE:** If splitting department number do not enter accounting defaults on this page. (See page ?)

**Step 2**

**Add items and Services**

Click on **Special Item**
Enter information for requisition line

Item Description:
Price:
Quantity:
Category:
Unit of Measure:
Additional Information:

Click **Add Item**

**NOTE:** For additional lines repeat above steps
Step 3

*Click Review and Submit

* Enter Justification/Comments that pertains to the entire order if any.

NOTE: For items that are used often check Select All / Deselect All click Add to Favorites or Add to Template(s) This procedure will save line items.

NOTE: If deletion of line item is needed check box next to line item and click Delete

*If requisition entry is complete

* Click Save & preview approvals you will receive a requisition number on confirmation page.
**Step 4**

**NOTE:** To edit requisition or add more information after save

Click **Edit Requisition**

If edit is not required continue with requisition process.

Click **Submit**

Click **Check Budget**

**Click View Printable Version** to print requisition, if needed.

Check box to Show Distribution Information
## Requisition: Order for Dr. John Doe

**Requester:** Linda Johnson  
**Business Unit:** NORMN  
**Requisition ID:** 3000007740  
**Date:** 12/11/2008

**Comments:** Ship UPS Overnight

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Qty</th>
<th>Price</th>
<th>Curr</th>
<th>UOM</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LAB TABLE</td>
<td>1.0000</td>
<td>5,010.0000</td>
<td>USD</td>
<td>EA</td>
<td>5,010.00</td>
</tr>
</tbody>
</table>

**Ship To:**
2750 VENTURE DRIVE
0001

**Attention:** Linda Johnson

**Due Date:** 12/12/2008

**Line**  
**Pct**  
**Req Qty**  
**Amount**  
**GL Unit**  
**Location**  
**Account**  
**State Code**  
**Dept Number**  
**Fund**

| Line 1 | 100 | 1 | 5010 | NORMN | 2750_0001 | 740005 | 99999999 | 137700130 | 72900 |

**Base Function:** 6101  
**State Agency:** 760003  
**St Bank Acct:** 70000
Feature: Splitting Chartfields

You may need to split the Chartfield spread. You can do this by adding additional lines.

**NOTE**: If splitting cost between two or more chartfields enter separate lines for each one. **Grant sponsored accounts must always appear on 1st line item.**

**STEP 1**
Define Requisition

Click ➤ to expand Line Defaults

Click ✉️ to identify vendor (if vendor unknown or not in system use **Best Source Vendor #0000019344**

* Enter requested due date

* Click Continue
*STEP 2

Click on Special Item

Note: Separate lines are required per each department number/account code used.

*Enter information for requisition line.

*Item Description:
*Price:
*Quantity:
*Category:
*Unit of Measure:
*Additional Information:

Click Add Item

NOTE: For additional lines repeat above steps.
*STEP 3

Click Review and Submit

NOTE: When splitting multiple department numbers click expand section at each line.
Click on next to SpeedChart and select department number from list.

(NOTE: when selecting department number from SpeedChart, quantity and account will disappear and will need to be re-entered).

*If requisition entry is complete

* Click you will receive a requisition number on confirmation page.
Reviewing Requisition Activity

Manage Requisitions page under eProcurement module allows you to monitor activity on the requisition once it has been created. You only need to know the requisition number to find what has happened since the creation.

From the main menu, select eProcurement > Manage Requisitions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Enter any known identifying information to locate requisitions, edit the criteria in search fields and click the Search button. Options include:  
* Requisition ID:  
* Date From: & Date To:(within time requisition or PO entered)  
* Request ID:  
* Request Status:  
* Budget Status:  
* PO ID: |
| 2    | Changes to an Existing Requisition can only be made if Edit Requisition appears under the Select Action drop down select Edit Requisition and click Go. (if edit requisition does not appear in your drop down you will need to contact Purchasing.) |
To view the lifespan and line items for a requisition, click the Expand triangle icon: 

Icons are illuminated as the requisition progresses through the purchasing process.

To edit or perform action on a requisition, make a selection from the Action dropdown list and click Go.

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### Receiving Items

When receiving items you have requested, you will use the eProcurement Manage Requisitions page to locate the requisition and enter the receipt.

From the main menu, select **eProcurement ➔ Manage Requisitions**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter <strong>Requisition ID</strong> number to locate requisition, click the Search button. <strong>Make sure date range is within time frame requisition was created.</strong></td>
</tr>
<tr>
<td>2</td>
<td><strong>Click</strong> drop down on <strong>Select Action</strong> select <strong>receive order</strong> click Go</td>
</tr>
<tr>
<td>3</td>
<td>Receive items page appears Check box next to item to receive.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Click</strong> <strong>Receive Selected</strong></td>
</tr>
</tbody>
</table>
5 Enter Received Quantity

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Qty</th>
<th>Reorder Qty</th>
<th>Accept Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>test items</td>
<td>2.0000</td>
<td></td>
<td></td>
<td>2.0000</td>
</tr>
</tbody>
</table>

6 Click Save Receipt

7 The receipt saved successfully message appears

**Receipt Saved Successfully**

You have saved receipt # 1000003280 containing the following items:

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Received Qty</th>
<th>Reorder Qty</th>
<th>Accept Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>test items</td>
<td>2.0000</td>
<td></td>
<td>2.0000</td>
</tr>
</tbody>
</table>

8 Click Return to Manage Requisitions to monitor additional requisition activity.
Approval Process

Step 1: Menu Choices

Click on the ‘Worklist’ hyperlink – top right corner
Click on the ‘Worklist’ link – from the menu

or

Click on the hyperlink from e-mail notification:
A requisition has been entered which requires your attention.

Requester: 408519
Business Unit: UNIVERSITY OF OKLAHOMA
Requisition ID: 2000001169
Requisition Name: 2000001169
Date: 2006-02-13

You can navigate directly to the approval page by clicking the link below.

Step 2: Approval Page

Requisition Approval

Req Name: 3000008071
Total: 50.00 USD
Requestor: Julene Wilson
Entered on: 02/17/2008
Status: Pending
Requester's Justification:
No justification entered by requester.

Line Information

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Vendor Name</th>
<th>Qty UOM</th>
<th>Price Curr</th>
<th>Requester's Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lab Supplies</td>
<td>VWR INTL 002</td>
<td>1,000 EA</td>
<td>0.05000 USD</td>
<td></td>
</tr>
</tbody>
</table>

Step 3: Review Requisition Information

Click **Select All / Deselect All**

Click **View Line Details**

Requisition line(s) will appear
Step 4: Approval Options

- **Approve** sends the requisition to next level of approval
- **Deny** sends the requisition back to requester
  
  If Deny is selected type the reason in the comments field
  
  An email notification, including comments will automatically be sent to the requester. Requester will have access to make any necessary changes if needed to denied requisition.

- Email notifications are automatically sent throughout the approval process accept for the pushback option

Step 5: Return to Worklist

Allows the approver to return to the worklist and view any remaining requisitions that need processing.
E-mail Samples

A requisition has been entered which requires your attention.

Requester: 408519
Business Unit: UNIVERSITY OF OKLAHOMA
Requisition ID: 2000001169
Requisition Name: 2000001169
Date: 2006-02-13

You can navigate directly to the approval page by clicking the link below.


The following requisition has been “Approved”.

Requester: 408519
Business Unit: UNIVERSITY OF OKLAHOMA
Requisition ID: 2000001182
Requisition Name: 2000001182
Date: 2006-02-15

You can navigate directly to the approval page for more information by clicking the link below.


The following requisition has been “Denied”.

Requester: 411753
Business Unit: UNIVERSITY OF OKLAHOMA
Requisition ID: 2000001169
Requisition Name: 2000001169
Date: 2006-02-13

You can navigate directly to the approval page for more information by clicking the link below.

Reports – Run Controls

❖ 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
Requisition Print

Step 1: Menu Choice

Purchasing

Requisition

Report

Print Requisition

Enter:

Business Unit – NORMN

The Requisition #

Report Request Parameters

<table>
<thead>
<tr>
<th>Business Unit:</th>
<th>NORMN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID:</td>
<td>3000003089</td>
</tr>
<tr>
<td>From Date:</td>
<td></td>
</tr>
<tr>
<td>Through Date:</td>
<td></td>
</tr>
<tr>
<td>Requester:</td>
<td></td>
</tr>
</tbody>
</table>

Statuses to Include

- Approved
- Canceled
- Completed
- Open
- Pending

Run Control ID: Print_Req

Language: English

Specified Recipient's

Run
Step 2: Click 

**Process Scheduler Request**

- User ID: 408519
- Run Control ID: Print_Req
- Server Name: PSNT
- Run Date: 11/02/2008
- Run Time: 4:41:00PM

**Process List**

- Select Description: Requisition Print SUR
- Process Name: PORG010
- Process Type: SQR Report
- Type: Web
- Format: PDF
- Distribution: 

Click  

**Step 3:**

Click on the Process Monitor button

- 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.
Step 4 Click

Until Run Status reads Success and Distribution Status reads Posted

Click on Details

Click on View Log/Trace

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

An Adobe Acrobat window will appear
PO Print

**Step 1: Menu Choice**

Purchasing
Purchase Orders
Review PO Information
Print PO

Enter PO number in PO ID field

Follow steps on page 21 starting with step 2
### Purchase Order

**Vendor:** 0000010344  
**Bill To:** 600 PASKENARIO OVAL  
**Ship To:** 2700 VENTURE DRIVE  
**Address:** CENTRAL MAIL OK 73019-3000  
**City:** NORMAN  
**State:** OK  
**ZIP:** 73019

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Extended Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>item</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total PO Amount:** $2.00

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#### TERMS & CONDITIONS

Unauthorized

The Board of Regents of The University of Oklahoma, Norman, OK 73060

University of Oklahoma Purchasing Department  
12/12/08