### Step | Action
--- | ---
**Navigation:** eProcurement - Requisition

1. **Requisitions** are requests to purchase goods or services. Per Regent’s Policy, **Requisitions** should be used for any purchase in excess of $5,000 or any service that may require a contract. To enter a **Requisition**, first ensure that defaults are setup for shipping and accounting information.

2. Click the eProcurement tile from the Home Screen and select **Requester Setup** on the left side menu.

3. From this screen, type in your **employee ID** in the **Requester** field and click **Search**.

4. On the **Requester Setup** page, several pieces of information will need to be filled in. Note that once these entries are made they will default in for all **Requisitions**. If these defaults ever need to be updated, navigate back to this page to make changes.
5 First enter in your default **Ship To** location. This is where all items will ship by default. Click on the magnifying glass and enter in part of your building location the **Description** field and click **Search**. Click anywhere on the correct **location** line.

![Look Up Ship To](image)

**Search Results**

<table>
<thead>
<tr>
<th>Ship To SetID</th>
<th>Ship To Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOONR</td>
<td>RP665_0529</td>
<td>865 RESEARCH PARK 0529</td>
</tr>
<tr>
<td>SOONR</td>
<td>RP665_0530</td>
<td>865 RESEARCH PARK 0530</td>
</tr>
<tr>
<td>SOONR</td>
<td>RP665_0560</td>
<td>865 RESEARCH PARK 0560</td>
</tr>
</tbody>
</table>

6 Next enter in your **Location** by performing the same steps as before with the **Ship To** address. Note that the **Location** is where invoices will be sent by default. This may or may not be the same as your **Ship To** location.

7 Enter your **phone number** in the **Phone** field. Be sure to include your **area code** when entering the **phone number**.

8 In the **Chartfields** section, enter in the **GL Unit**, **Fund**, **Org**, **Function**, **Entity** and depending on the Fund used, **Source** and **Purpose** may also be required. Do not enter in an **Account**.

9 When these fields have been entered, click **Save** at the bottom of the screen.
To begin Requisition entry, click on the eProcurement tile on the Home Screen and select Requisition on the left side menu or use the NavBar and select Navigator > eProcurement > Requisition.

From the Create Requisition page you can click on OU Marketplace to access punch-out catalogs or click on Special Requests to create a regular Requisition.

Hint: Refer to the job aids on the OU Marketplace for more information on creating Marketplace orders.

From the Special Requests page, enter the information about the goods or services needed.

Under Item Description, enter a detailed description of the good/services needed in this field. Enter in the Price for the good or service and the total Quantity needed for the current fiscal year. Note that the Price times the Quantity will create the total Requisition amount. Use the magnifying glass to pull up the correct Unit of Measure. Note that for services, LOT should be used as the Unit of Measure.
Next, click on the magnifying glass next to **Category**. In the pop-up box that appears, change the **Search By** option to **Description** and type in part of the **description of the good/service**. Note that the **Category Codes** are the same as the **GL Codes**. Locate the correct category and click on the category number.

Under **Supplier**, click the magnifying glass next to **Supplier Name**. In the pop-up box that appears, type in part of the **supplier's name** and click **Find**. Review the information under **Search Results** and once the correct supplier has been located, click the **radio button** to the left of the **supplier's location** and click **Select** at the bottom of the screen.

**Hint**: Never choose an entry that lists **1099** or **Do Not Use** under the **Default Location**. Use the location that most closely matches your quote or other order information from the supplier noting the remit to address. If there are multiple addresses for the same location, choose the location that lists **EFT** in the **Default Location**.
16. Scroll to the bottom of the screen under **Additional Information** and use this field to enter any additional information to the Purchasing Department or supplier. If the additional information is for the supplier, click the **Send to Supplier** box.

17. When the basic details have been entered, click the **Add to Cart** button.

18. At the top of the page, you’ll see the **number of lines** in your cart. Continue to add order lines as needed. Note that you should only have one supplier per **Requisition**.

19. When the appropriate lines have been added to your **Requisition**, click **Checkout**.

20. Under **Requisition Lines**, click the arrow to expand the details of the **Requisition**. Then click the arrow next to **Accounting Lines** and select the **Chartfields2** tab to review the chartfield spread.

21. The default accounting information from your account will default. To update the individual accounting lines, make the accounting updates in this section.

22. Under the **Accounting Lines** section, additional **Distribution Lines** can be added to the **Requisition** by clicking on the plus (++) sign.
23 If multiple distribution lines are used, click the drop-down menu under **Distribute By** if the selection needs to change from **Quantity (QTY)** to **Amount (AMT)**.

24 Next, click the **Chartfields1** tab to determine how the distribution lines should be split. Distributions will be split by percentage. Note that the percentage determined on the distribution lines will be the percentage that all invoices will be split for payment. Distributions cannot be changed per invoice.

25 To change the **Physical Nature** of the Requisition from **Goods** to **Services**, click on the **Line Details** icon 📊. By default, all Requisitions will default in as **Goods**. Requisitions for services should also have the **Amount Only** box checked.
Note that by selecting **Amount Only**, the quantity will be updated to 1. Click **Yes** on the pop-up box that appears to confirm this update.

The **Line Details** section is also where **Waiting for Bid** can be selected. In the event that a solicitation is required because the supplier and final cost is unknown, select **Best Source** (#9188888888) as the supplier, enter the **Quantity** as 1 and **Price** as $1.00. This will initiate the process for Purchasing to complete a solicitation to fulfill your order. Once the supplier and price are determined, the **Requisition** will be returned for final edits before sourcing to a Purchase Order.

To add attachments to the **Requisition**, click on the **Add More Comments and Attachment** hyperlink under the **Requisition Comments and Attachments** section. In the pop-up window, click **Add Attachments**. Click the **Browse** button to locate the document, click **Upload** and once the file appears, click **OK**. Additional attachments can be added by clicking **Add Attachments** again and following the previous instructions.
29. Verify that the Ship To Location selected will be able to receive the goods/services being requested. Click the box next to Ship To Confirmation to confirm the address is correct.

30. Once all required information has been entered and attached, scroll to the bottom of the screen and click Check Budget.

31. A pop-up box will appear noting that the Requisition will be placed in Open Status to perform budget checking. Click OK.

32. PeopleSoft will begin the budget checking process. When complete, your Budget Checking Status should display as Valid.

33. If a pop-up message appears indicating that there is an issue with the budget status, review your budget details to ensure that there are enough funds available to continue with orders on this chartfield spread.

   Hint: Refer to the job aid on Budget Details for more information on how to look up this information.

34. If the Budget Checking Status displays as Error, you will need to resolve the budget issues before the Requisition can be submitted.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>Once budget checking is valid, click on the <strong>Save &amp; Submit</strong> button.</td>
</tr>
<tr>
<td>36</td>
<td>The <strong>Confirmation</strong> screen will note that your <strong>Requisition</strong> has been submitted and your <strong>Requisition Number</strong> will be displayed.</td>
</tr>
<tr>
<td>37</td>
<td>The workflow screen will show you who the approvers are for your <strong>Requisition</strong>.</td>
</tr>
<tr>
<td>38</td>
<td>To pull up a previously submitted <strong>Requisition</strong>, navigate to <strong>eProcurement &gt; Manage Requisitions</strong>.</td>
</tr>
<tr>
<td>39</td>
<td>Note that a Requestor only has access to their own <strong>Requisitions</strong>. If an active <strong>Requisition</strong> was established by a previous Requestor and you now need access to their <strong>Requisitions</strong>, your Financial Approver should submit an updated security form to request access to another Requester’s <strong>Requisitions</strong>.</td>
</tr>
<tr>
<td>40</td>
<td>If a <strong>Requisition</strong> is denied by an Approver, the Requester will receive an immediate email noting the reasons for the denial. To make updates to the <strong>Requisition</strong>, navigate back to <strong>Manage Requisitions</strong> and locate the <strong>Requisition</strong> in <strong>Denied Status</strong>.</td>
</tr>
</tbody>
</table>
From the drop-down menu, select **Edit** and then click the **Go** button.

To view the reasons for denial, click on **Preview Approvals** and in the pop-up box that appears, expand the **View/Hide Comments** box. The denial reasons will appear in the **Comments** field.
43  Make the necessary changes to the **Requisition**.

44  Click on **Check Budget**. Once the **Requisition** has a valid budget status, click **Save & Submit** again to resubmit the **Requisition** for approval.

45  Once the **Confirmation** screen appears, click on **View Printable Version** to print a copy of the **Requisition**.

46  A pop-up box will appear asking if the distribution information for the **Requisition** should be printed. Click **Yes**.

47  The details of the **Requisition** will appear and can be printed from this page.

48  If you have submitted a **Requisition** for approval and the **Requisition** needs to be cancelled, you can cancel the **Requisition** as long as it has not been fully approved.

49  To review the current status of a **Requisition**, navigate to **eProcurement – Manage Requisitions**.

50  Locate the **Requisition** and click the arrow to the left of the **Requisition ID** number. Then click on the **Approvals** icon.
51 As long as the Requisition is in a Pending status, it can be updated. Confirm the status is pending and then click Return to Manage Requisitions at the bottom of the screen.

52 Under the Select Action drop-down menu for the Requisition, select Cancel and click the Go button.

53 The next screen will display the Requisition Details. Click the Cancel Requisition button.
The Requisition will then display as Cancelled.

To copy a previously entered Requisition, navigate to the Manage Requisitions screen.

Locate the Requisition and from the Select Action drop-down menu, select Copy and then click the Go button.

Hint: By default, only Requisitions within the last week will display. To find an older Requisition to copy, change the Date From and Date To options.
You will be returned to the Checkout page for the Requisition. Review the details of the order, including confirming the Ship To location by clicking on the Ship To Confirmation box, and then select Check Budget at the bottom of the screen.

Once the Budget Status displays as Valid, click on the Save & Submit button to send the Requisition off for approval.