State of Oklahoma COR452

eProcurement Requisition Manual
Security Provisioning

Office of Management & Enterprise Services

OKLAHOMA

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Document History

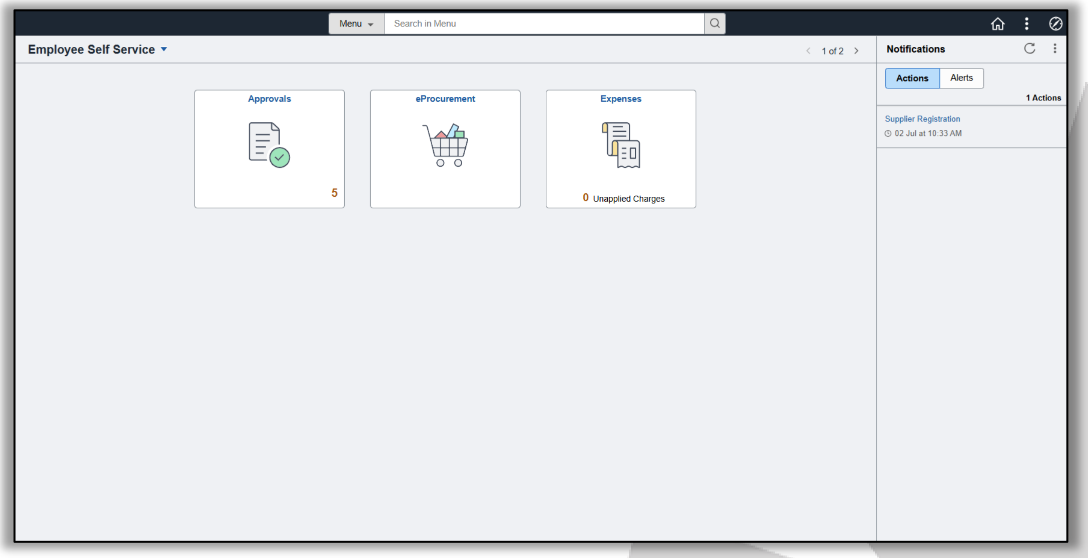
Document Revision	Date	Description
1.0	03/19/2012	Initial Document
1.1	04/16/2012	Revised to add Line Details info.
1.2	02/08/2013	Revised for Statewide application
1.3	10/15/2014	Upgrade Update
2.0	11/15/2024	Upgrade Update

Learner Outcomes

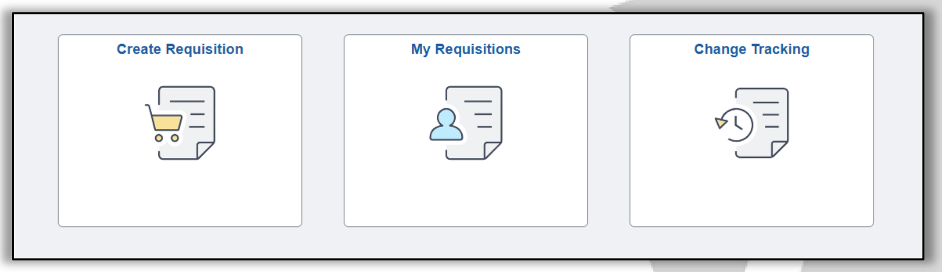
- Initiate and create an eProcurement (ePro) requisition.
- Recognize how to expedite the requisition to a purchase order.
- Define how to achieve security provisioning.
- Understand the system described in this training is PeopleSoft.
- Describe system routes to approvers after requisition is created.
- Recognize system routes requisition approval to approvers to view requisition and act.
- Define approval process as approving or denying requisition through the organization (workflow) until accomplished or stopped.
- Apply the Learn transcript to your two-year CPO CEU report when due, when submitting as verification of attendance to receive two CPO CEUs.
- Define how to achieve security provisioning.

Part 1 - Creating the ePro Requisition

Step 1 – Define Requisition

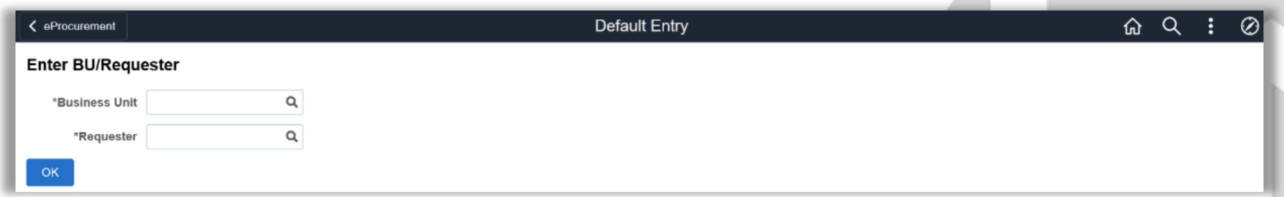


From the Home Page, select the **eProcurement** tile.

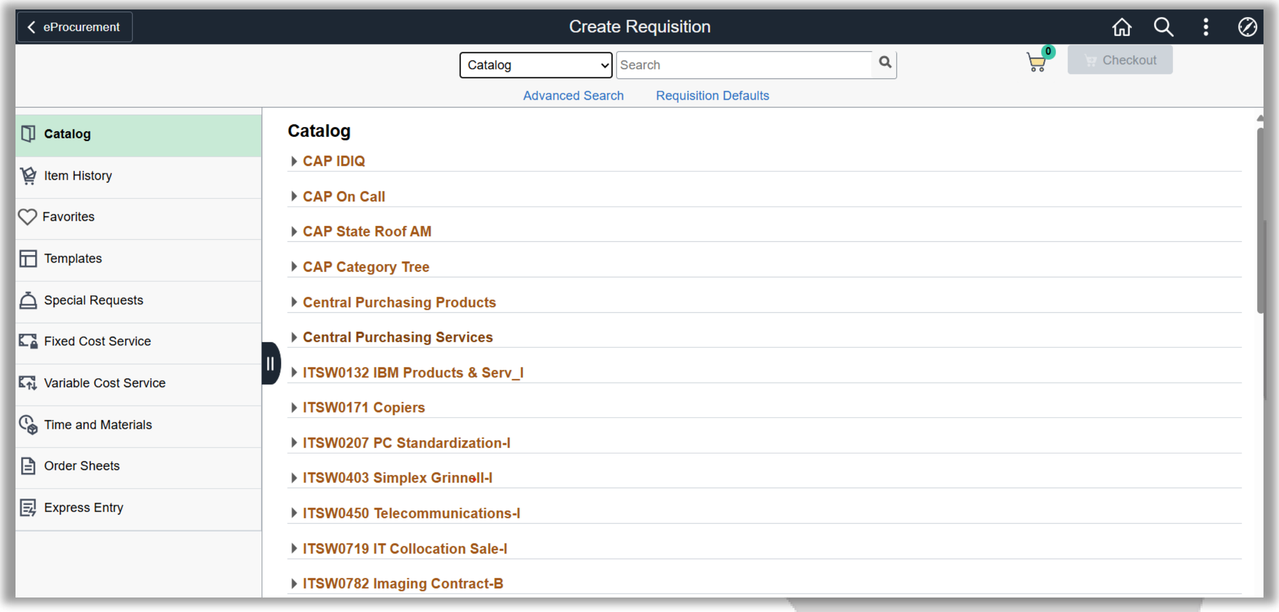


The eProcurement Menu opens.

Select **Create Requisition.**



The user may need to enter their Business Unit and click **OK** to access the Create Requisition page.



Create Requisition page opens.

Links in top menu are:

- **Advanced Search** – Allows user to find items for a new or existing requisition
- **Requisition Defaults** – Allows user to set defaults that apply to new requisitions.

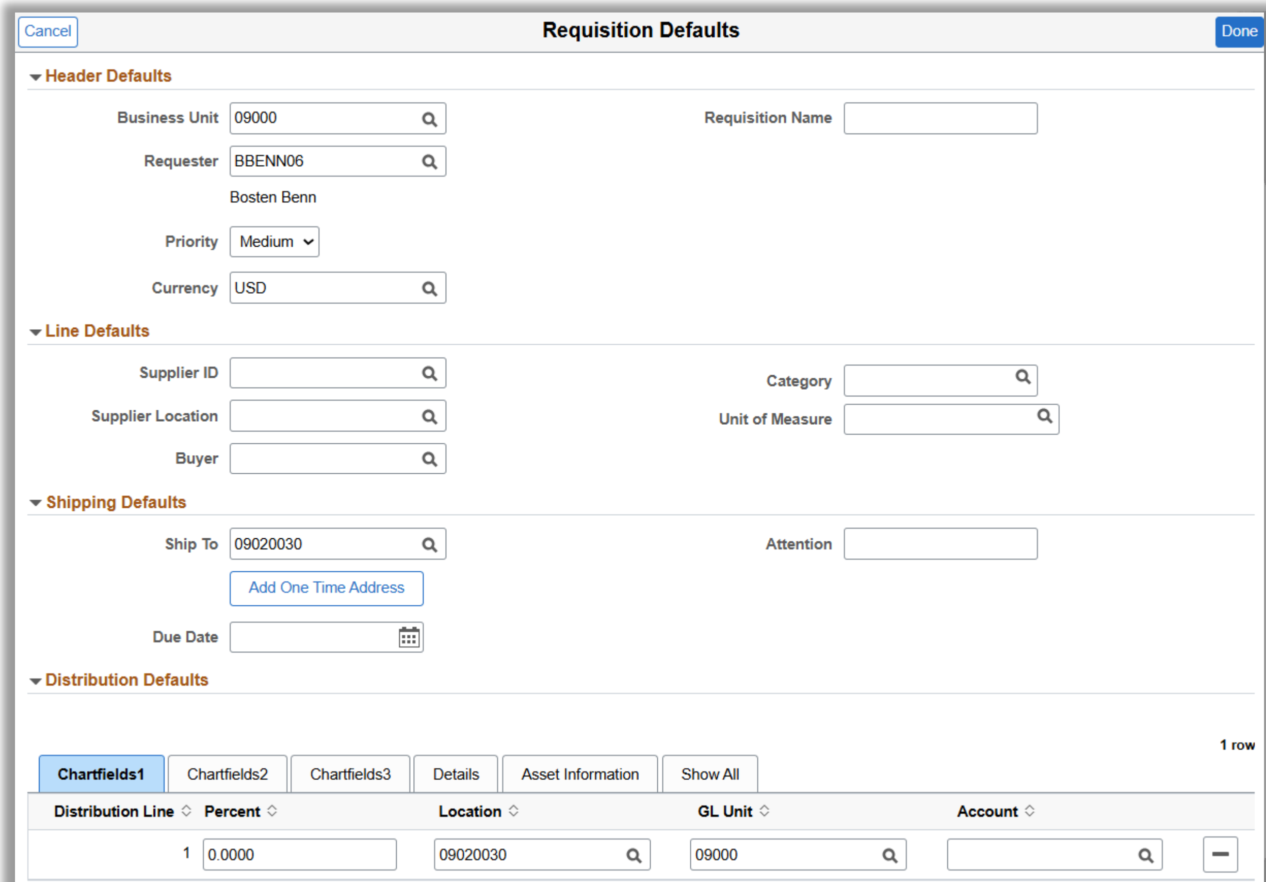
The tiles in left menu include different options to create a requisition:

- **Catalog**.
- Item History.
- Favorites.
- Templates.
- **Special Requests**.
- Fixed Cost Service.
- Variable Cost Service.
- Time and Materials.
- Order Sheets.
- Express Entry.

- **Click** Requisition Defaults.

Requisition Defaults Page

Requisition Defaults shows field values that can be defaulted to create requisitions. This information saves user keystrokes by populating the requisition automatically as the requisition is created online.



Line Defaults, Shipping Defaults, and Distribution Defaults – The values that you enter on this page can be applied to the entire requisition at the line, shipment, or distribution levels.

NOTE: The fields that you enter on this page apply to the entire requisition. You can override these values on the requisition line or at the shipment or distribution level. Default values that appear in these fields come from the item definition—according to the item default hierarchy in PeopleSoft eProcurement and Purchasing. When no predefined values exist, the data you enter in the line defaults section replaces blank fields as defaults.

Field Definitions

Business Unit: Enter the Business Unit (Agency) requesting these materials or services.

Requester: Enter the name of the person requesting these materials or services. This can be the name that defaults, or you can purchase on behalf of another person. To purchase on behalf of another user, these requesters must be defined on the User Preferences page.

Priority: Default is Medium. Choices are High, Medium, and Low.

Requisition Name: (Optional) Enter a description of the request to help you identify this requisition as it flows through the system. The request can also be tracked using the requisition ID assigned when it is saved. If no name is entered, the requisition number will default into this field.

Supplier ID: If supplier ID is known, enter. If not, it can be populated when creating the Purchase Order.

Supplier Location: (Optional) View the location of the supplier. The default is based on the value that is defined for the supplier.

Buyer: Select a buyer for this requisition. At the requisition line level, the system uses the buyer from the item definition or item supplier.

Category: Define a default category for this requisition.

Unit of Measure: Define the unit of measure for use on this requisition.

Ship To: The standard address to which most of the requisition is delivered.

Add One Time Address tile: Click to access the Shipping Address page, where you can enter a shipping address that is not in the standard ship to location codes.

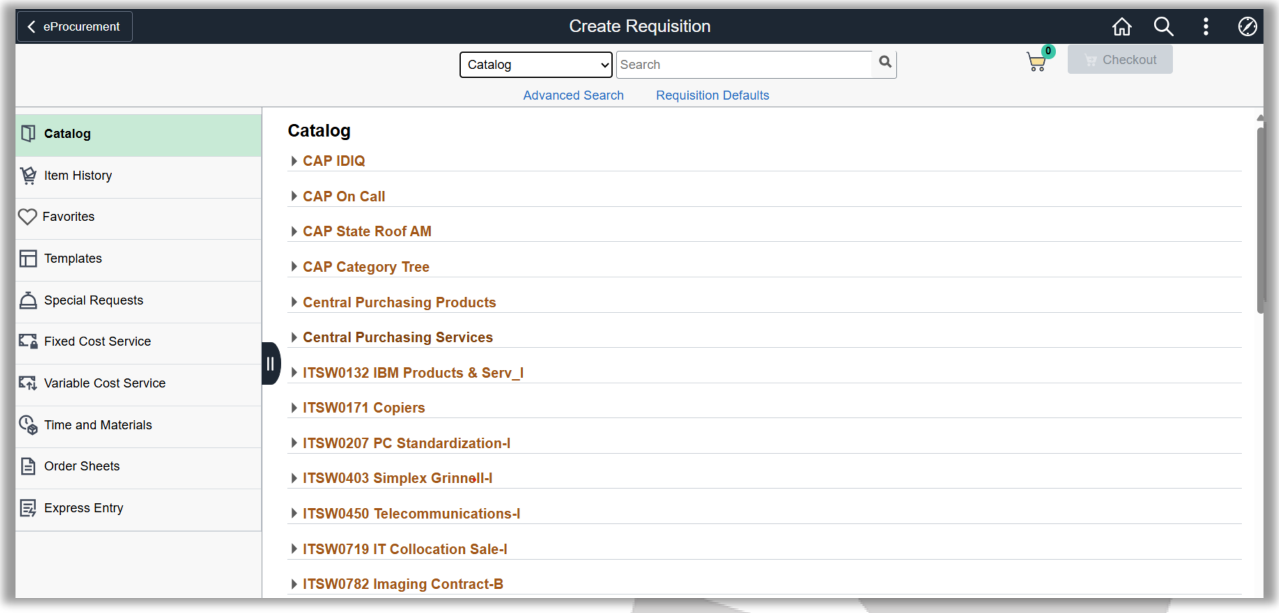
Due Date: The standard date you wish to receive the items on this requisition.

Attention: Enter the person from whom you want to receive notification about this shipment. The system includes this field value on outbound purchase orders to the Marketplace.

Distribution Defaults: Enter ChartField and asset management information as necessary.

Click the **<u>Done</u>** button.

Step 2 – Add Items and Services (Special Requests)



There are different methods to create a requisition, shown in the left tile menu.

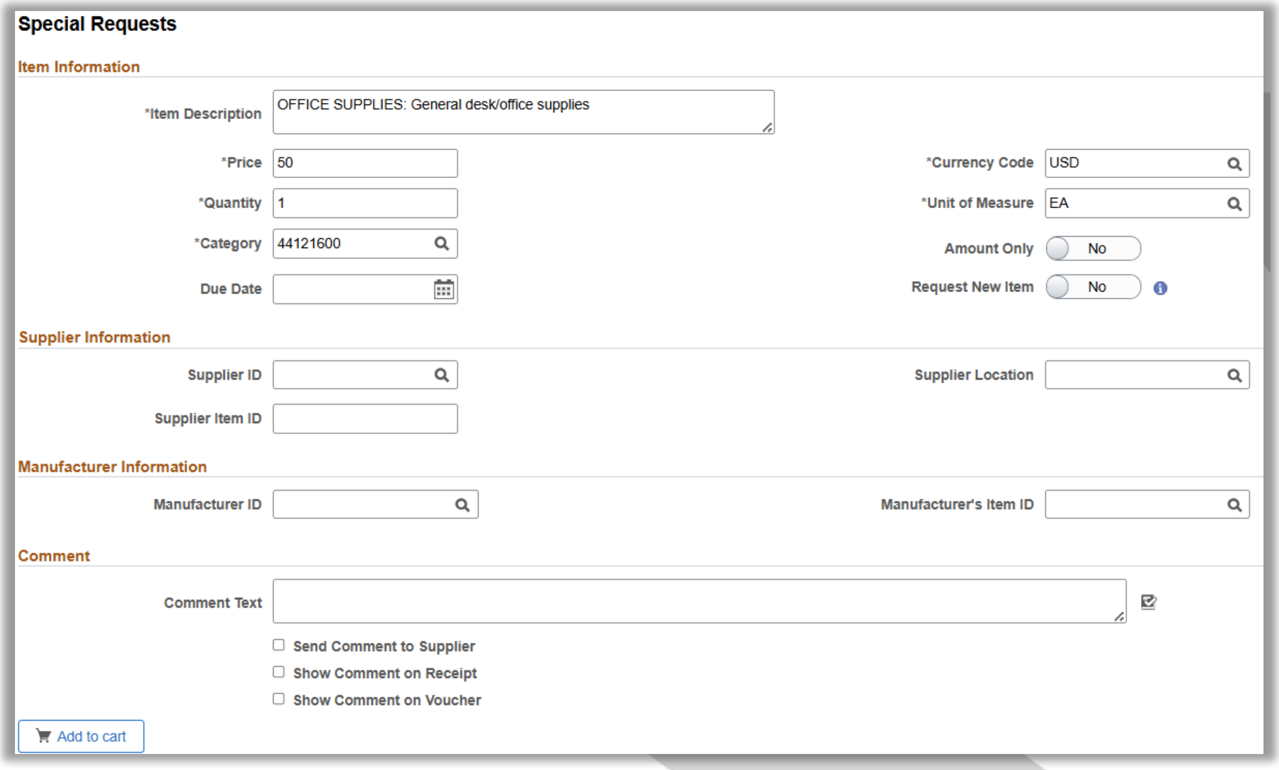
- Catalog, Special Requests, Express Item Entry, etc.

Special Requests is the most common method of creating a requisition.

Select the **Special Requests** section from the left windowpane.

Special Requests Page

Item Information



All fields with '*' are required.

Under Item Information, complete **Item Description;** make the description as detailed as possible.

- Describes the item being acquired and populates the requisition on the line at Checkout.

Tab down to enter **Price**, then over to **Currency** and leave as USD.

Enter the **Quantity** of items and the **Unit of Measure**.

- Use the looking glass icon to select from the UOM list provided.

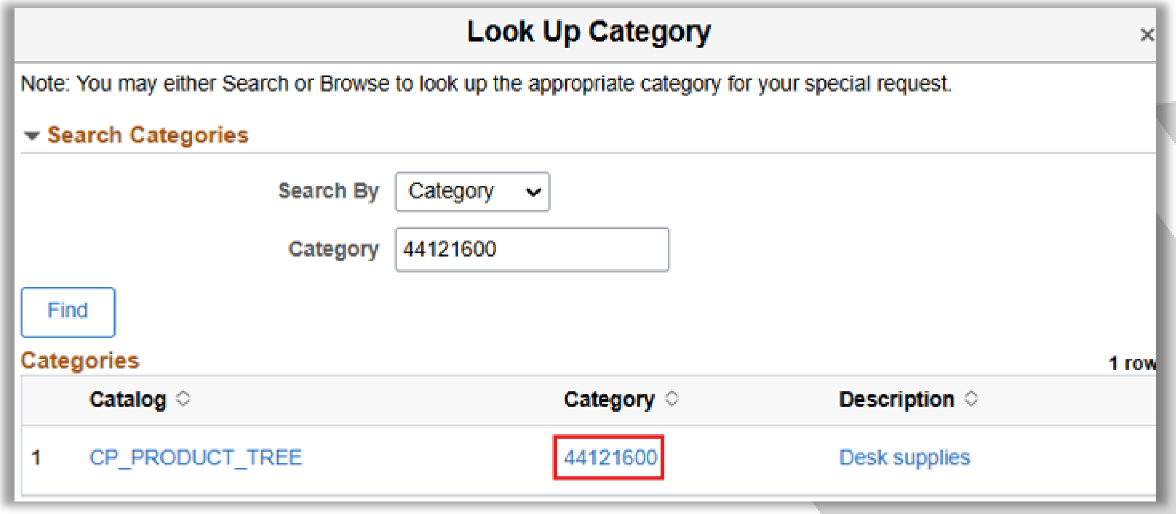
Tab down to **Category**.

- Entering the associated category code is important to the success of routing the requisition to the appropriate approvers.
- To research the category code before starting the requisition, go to unspsc.org or use the looking glass to search.

Click the **looking glass icon**.

Look Up Category

Search Categories



The **Look Up Category** page opens.

The **Category** field is populated with the category code entered.

To search:

- Use the first 4-6 numbers of category code and click the **Find** button to show Categories beginning with those numbers.
- Or use all eight numbers if category code is already known.

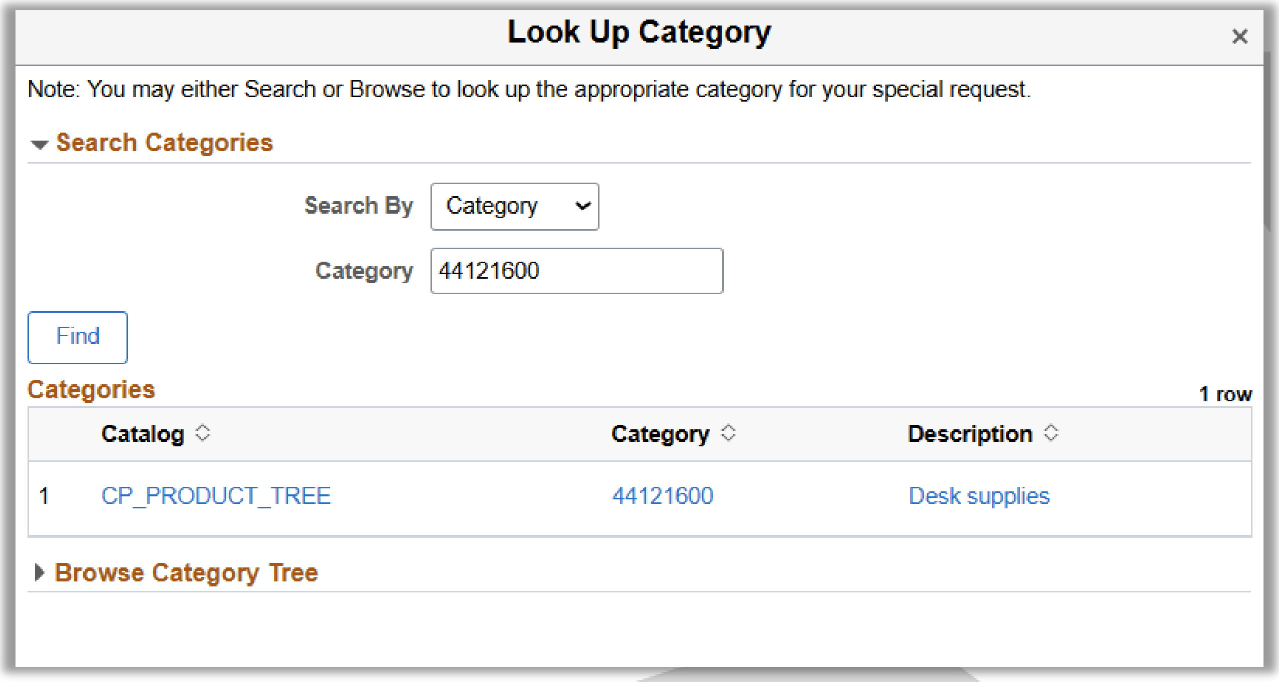
Select the **Find** button to drill down and find the 8-digit number.

- The category code is used for tracking detailed spend information. Use the entire 8-digit number when selected for the requisition.

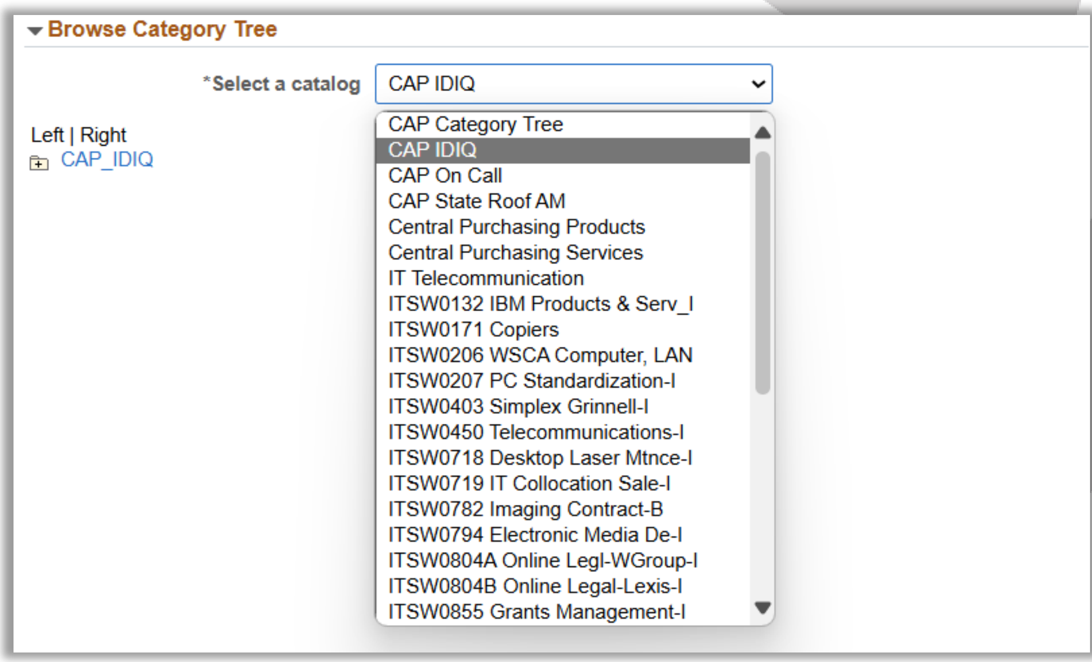
Click the **Category** hyperlink and the Special Requests page populates with the 8-digit category code.

Browse Category Tree

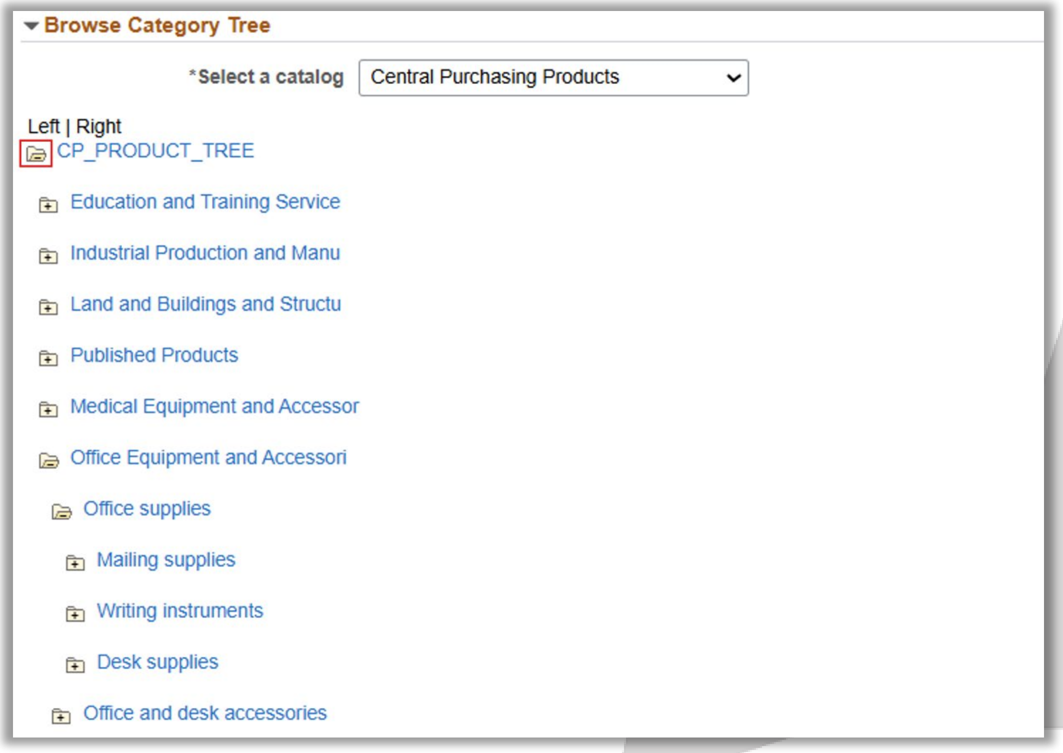
In addition, search for the category code by using the **Browse Category Tree** and selecting a catalog from the dropdown menu.



Click the **Browse Category Tree** line.



Click the dropdown menu, then **select** the appropriate catalog option.



Click the **folder icon** to drill down to the appropriate category.

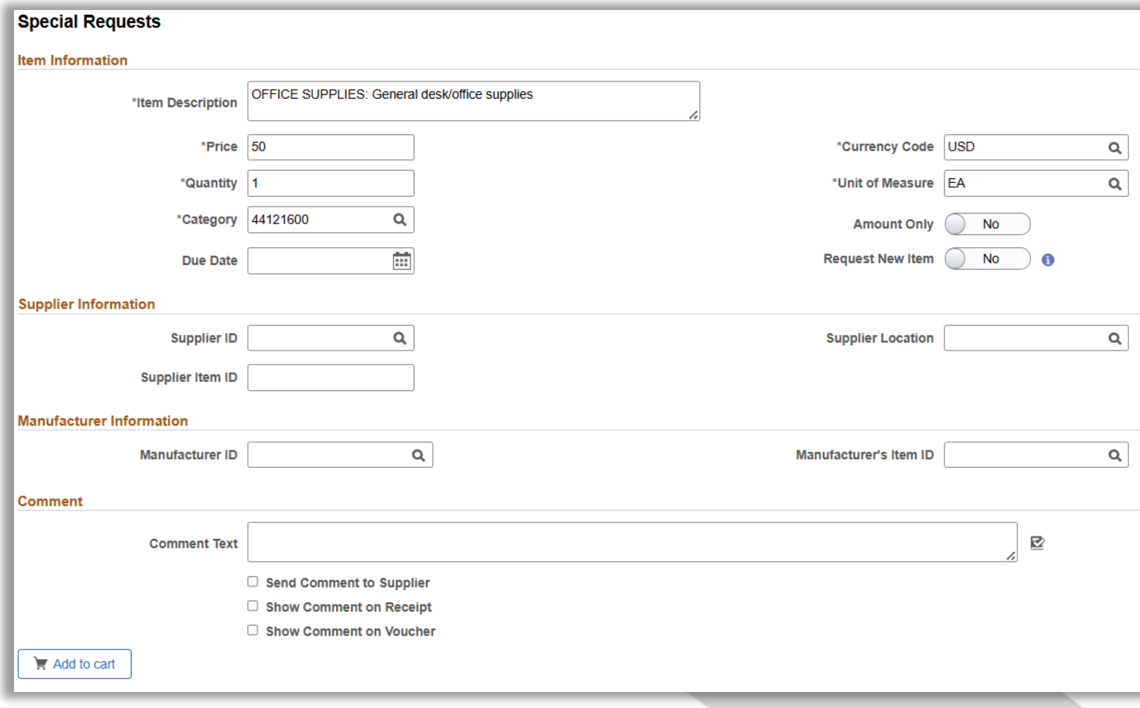
To use the **Catalog** for a statewide release:

- Select the folder icon for the catalog.
- Select the appropriate category and continue.

Supplier Information

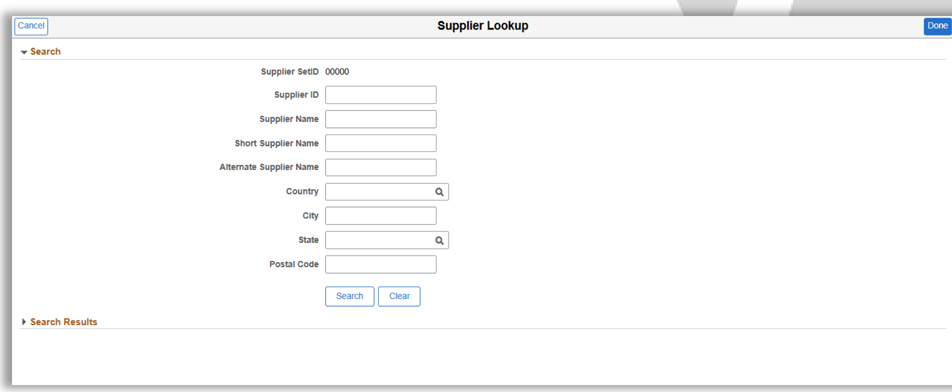
Under **Supplier Information,** enter the Supplier ID if known.

- Suppliers are **not** required on requisitions; in the event there is not one (e.g., a solicitation request).



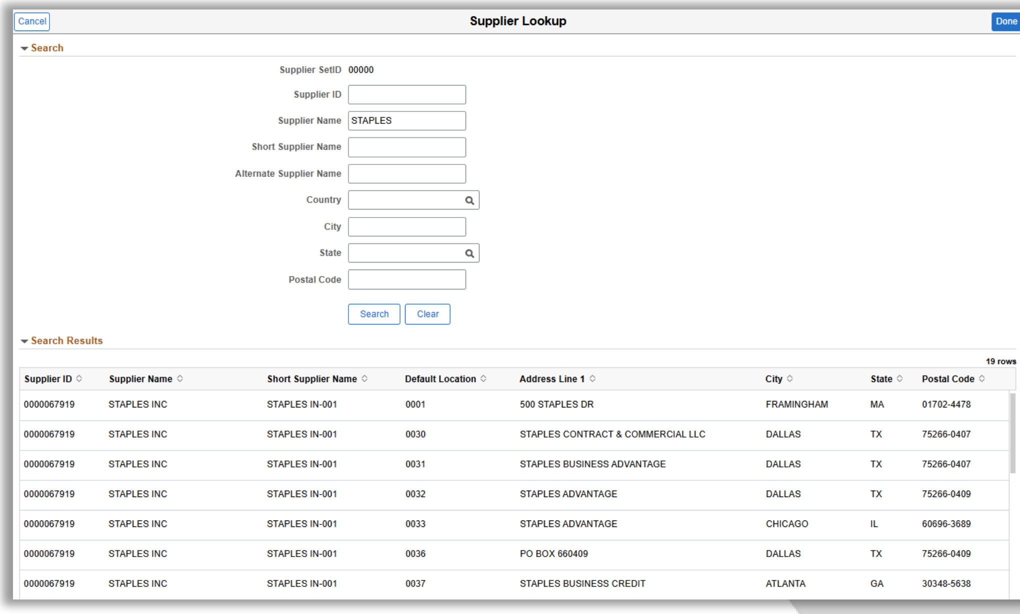
NOTE: Supplier Information is optional when creating a requisition and can be added later during PO creation.

Click the looking glass icon to search.



Enter any information known about the supplier. For this example, the Supplier Name STAPLES was used to produce the following results.

Click the **Search** button.



Cancel | Supplier Lookup | Done

Search

Supplier SetID 00000

Supplier ID

Supplier Name STAPLES

Short Supplier Name

Alternate Supplier Name

Country

City

State

Postal Code

Search | Clear

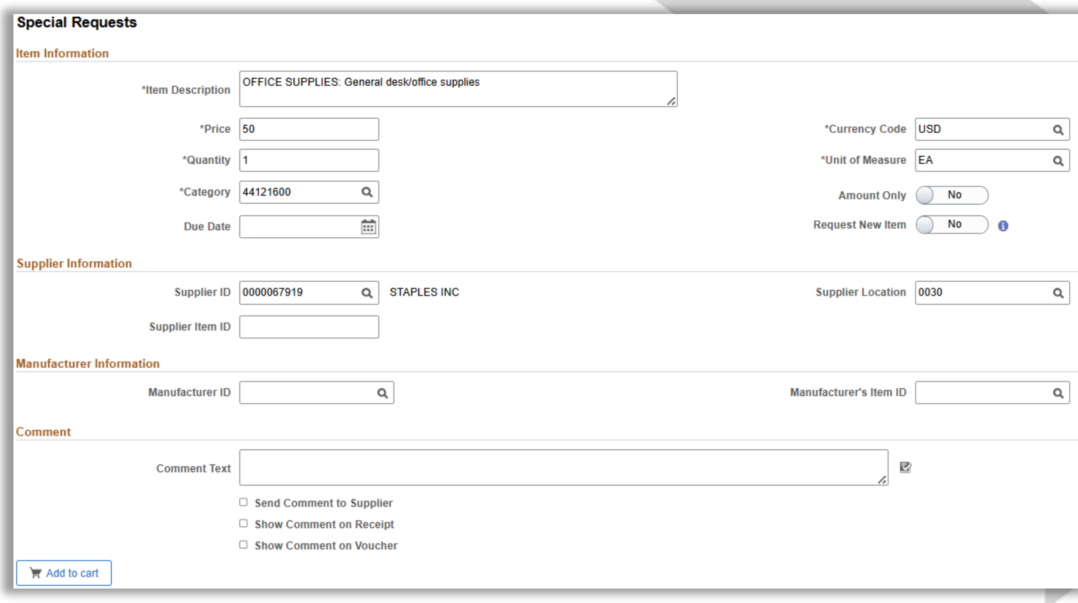
Search Results

19 rows

Supplier ID	Supplier Name	Short Supplier Name	Default Location	Address Line 1	City	State	Postal Code
0000067919	STAPLES INC	STAPLES IN-001	0001	500 STAPLES DR	FRAMINGHAM	MA	01702-4478
0000067919	STAPLES INC	STAPLES IN-001	0030	STAPLES CONTRACT & COMMERCIAL LLC	DALLAS	TX	75266-0407
0000067919	STAPLES INC	STAPLES IN-001	0031	STAPLES BUSINESS ADVANTAGE	DALLAS	TX	75266-0407
0000067919	STAPLES INC	STAPLES IN-001	0032	STAPLES ADVANTAGE	DALLAS	TX	75266-0409
0000067919	STAPLES INC	STAPLES IN-001	0033	STAPLES ADVANTAGE	CHICAGO	IL	60696-3689
0000067919	STAPLES INC	STAPLES IN-001	0036	PO BOX 660409	DALLAS	TX	75266-0409
0000067919	STAPLES INC	STAPLES IN-001	0037	STAPLES BUSINESS CREDIT	ATLANTA	GA	30348-5638

NOTE: There are several options listed under Search Results to choose from. Look at Default Location, Address, City or State to help determine the correct Supplier selection.

Select the appropriate supplier.



Special Requests

Item Information

*Item Description: OFFICE SUPPLIES: General desk/office supplies

*Price: 50

*Currency Code: USD

*Quantity: 1

*Unit of Measure: EA

*Category: 44121600

Amount Only: No

Due Date

Request New Item: No

Supplier Information

Supplier ID: 0000067919 STAPLES INC

Supplier Location: 0030

Supplier Item ID

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

Comment

Comment Text

Send Comment to Supplier

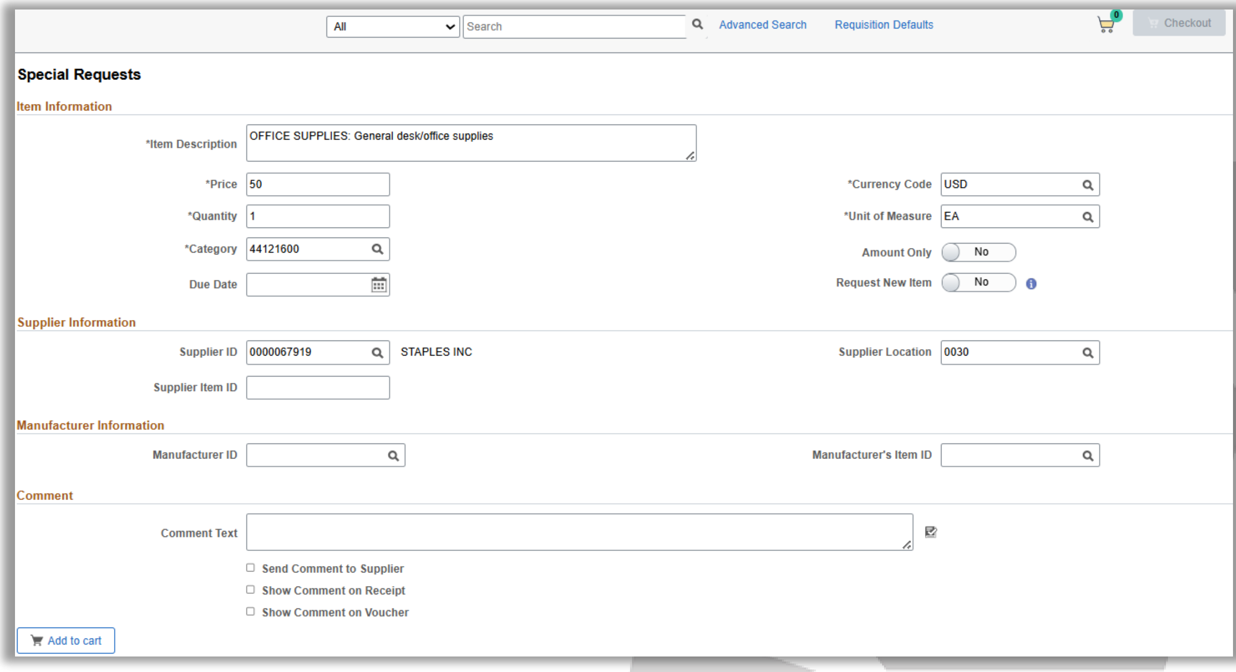
Show Comment on Receipt

Show Comment on Voucher

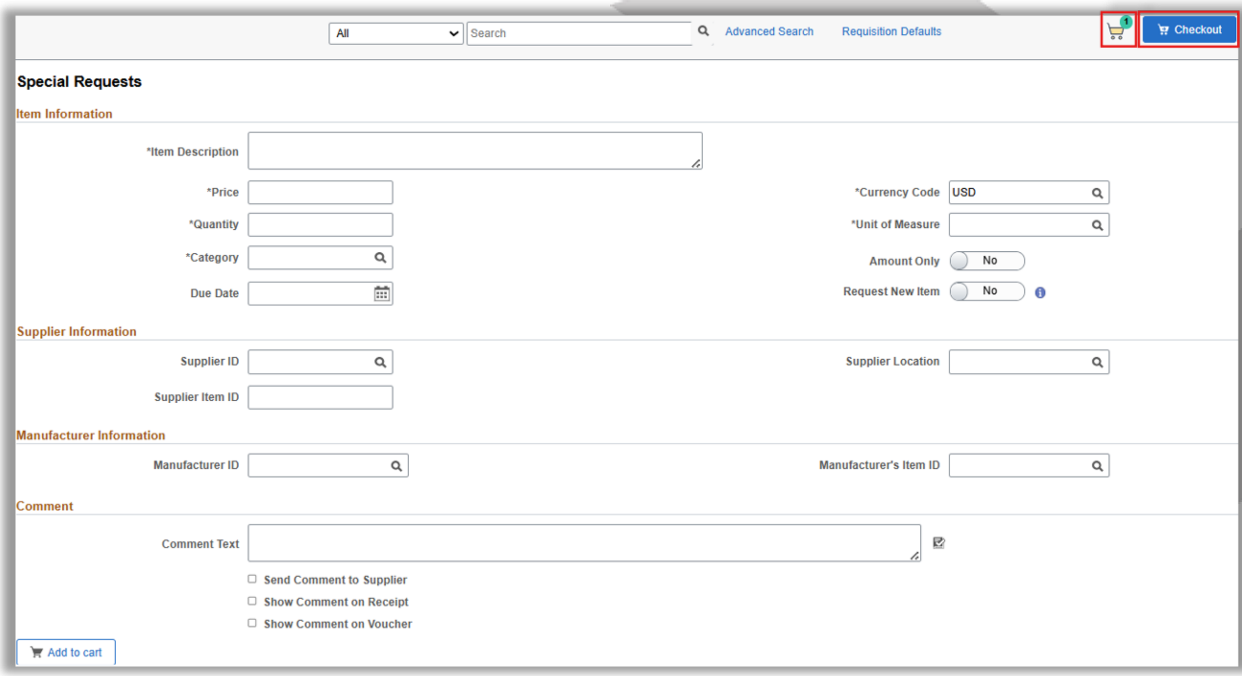
Add to cart

Notice the Supplier Information has been updated.

Step 3 - Add to Cart and Checkout



After the line is completed, click the **Add to Cart** button at bottom left of page to save the line and refresh to a blank page.



Repeat steps to add more lines as needed to complete the requisition.

The cart icon will show how many lines are included in the requisition. When finished entering lines, select the **Checkout** button.

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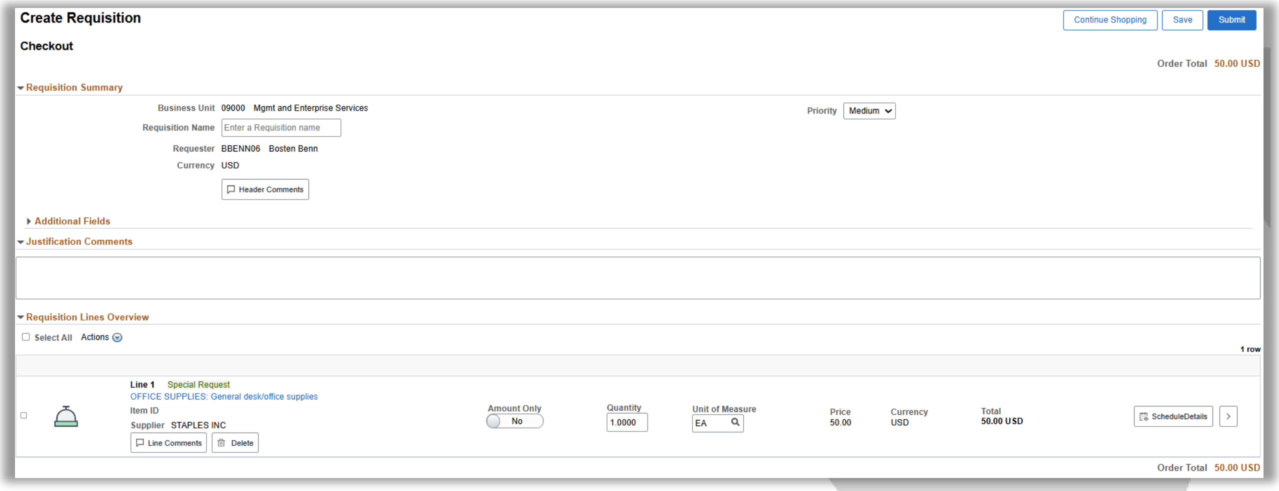
Step 4 - Review and Submit

Select **Checkout** to review lines added to cart.



Continue reviewing the requisition, and complete any missing information in the fields provided if necessary.

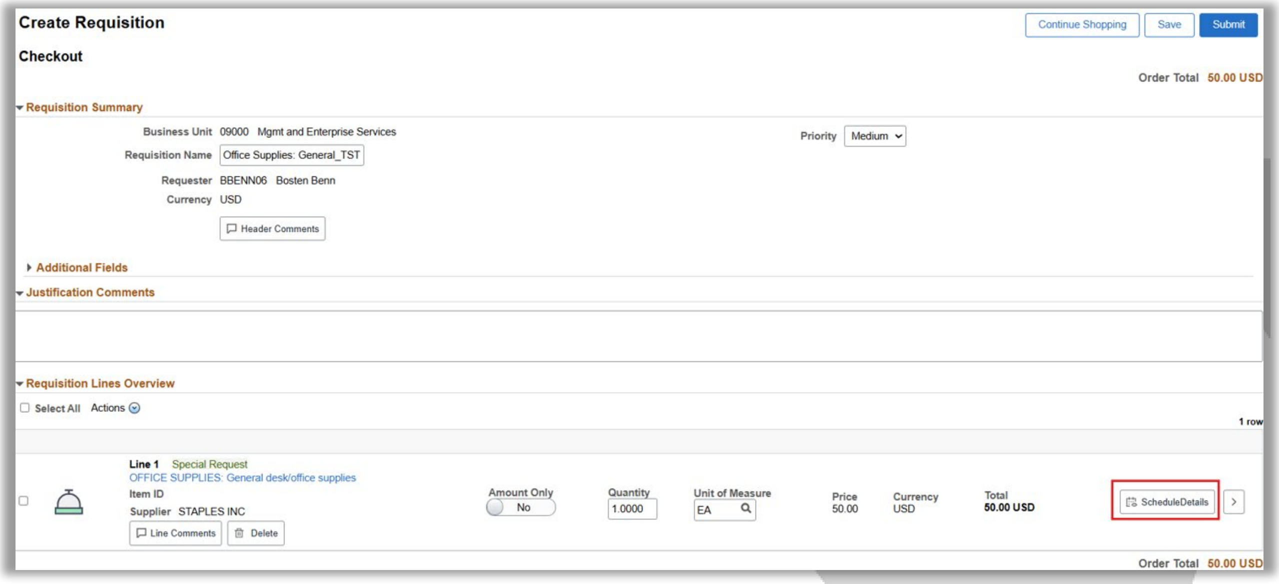
Review all information entered previously for accuracy and check if all lines needed are added.

Naming the Requisition

- **Requisition Name** allows for 30 characters
- The requisition name should describe the acquisition and will be used for review by OMES.
- Use the fiscal year and product or services for the acquisition.
- Use CO for change orders; PO for purchase orders for changes to an existing purchase order (e.g., CO FY24 PO18445).
- OMES Central Purchasing can determine the purchase order being changed by using the last four or five digits of the PO number in the description.
- Shorten the name using FY for the renewed fiscal year (e.g., FY24,2ndRenewal5yr).
- The agency can use the name for tracking purposes.
- Detailed information OMES is requesting must be in the justification.

NOTE: This is a limited field, so shorten the name as needed.

Creating Requisition Schedules/Distributions

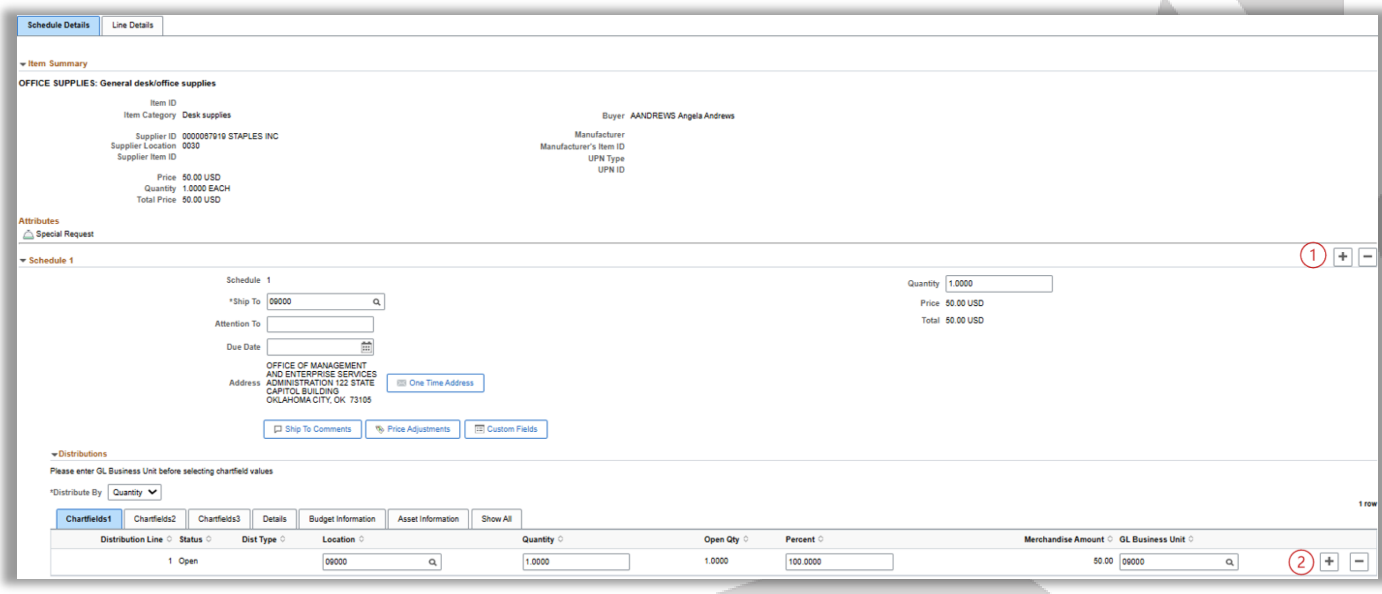


After reviewing the Requisition Summary information, **enter** Schedule Details for the line.

Select the **<u>Schedule Details</u>** button on the right side of the line.

Schedule Details Page

The Schedule Details page allows users to specify multiple shipping schedules for each line and to define multiple distributions for each schedule. The Schedule page defaults to allocate the total by Quantity, but it can also allocate by Dollar amount.



1. To add another schedule row, select the **Plus (+)** button on the Schedule line.

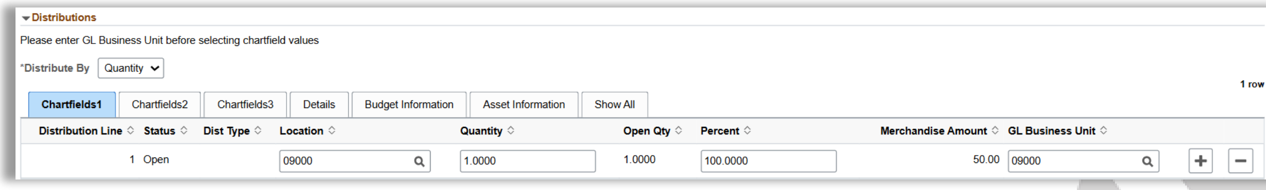
2. To add another distribution row, select the **Plus (+)** button on the Distribution line.
   - To delete a schedule/distribution row, select the **Subtract (-)** button on the appropriate line.

Ship To: Select the location to which the supplier will ship the order. You can update this value for each schedule that you define.

Attention To: Enter the person to whom or place where the services or goods are to be delivered. The system uses values for this field from PeopleSoft eProcurement requisitions. You can override the value or enter a value.

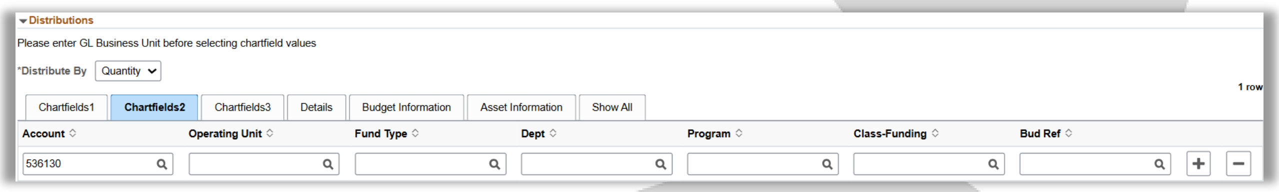
Due Date: (Optional) Select the requisition schedule due date. The date that you enter becomes the default purchase order due date. If you don't specify a due date here, when you source the requisition to a purchase order, the system derives the due date by incrementing the purchase order date by the number of lead-time days defined for the item. If the item is not defined in the system, or if you are ordering by description-only, the due date becomes the purchase order due date by default.

Chartfields Tabs – Budget/Funding Information

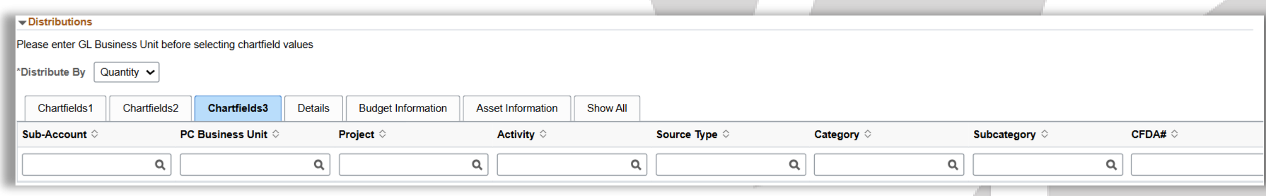


Distribute By: Default value is "Quantity." Can be changed to "Amount", meaning the sum of all distribution amounts must equal the schedule amount.

NOTE: It is not recommended that requisition distribution lines for inventory items have a Distribute By value of *Amount* as it can cause rounding problems if sourced to PeopleSoft Inventory.

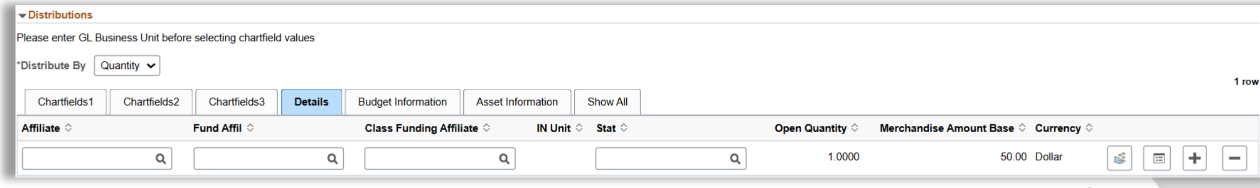


NOTE: Department (Dept) Value is always required. The system will allow user to save if left empty, but the Requisition will NOT be routed for approval and will cause the requisition to get stuck in an error step. Department ID is required for submittal.

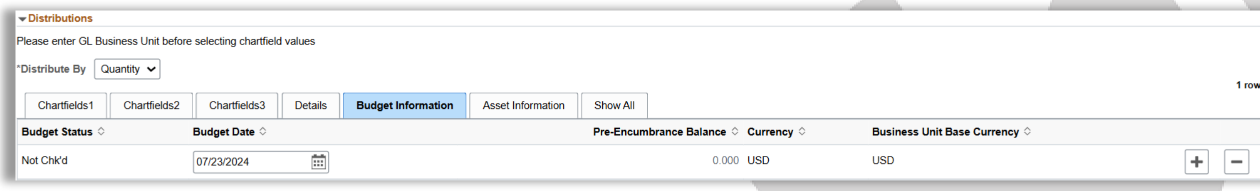


Enter valid funding information into Chartfields Tabs.

Details Tab



Budget Information Tab

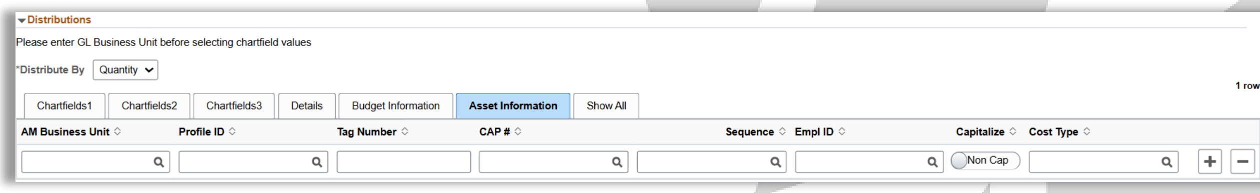


Budget Status: Values are "Valid", "Error", and "Not Chk'd". Budget Values are returned when Budget Checking process is completed.

Budget Date: Commitment control uses this date to determine the budget period to which this item cost belongs.

Pre-Encumbrance Balance: When commitment control is activated, the system displays the pre-encumbrance balance. When you create a purchase order, commitment control liquidates the pre-encumbrance balance from the requisition and establishes an encumbrance for the purchase order. You must reestablish pre-encumbrance documents manually.

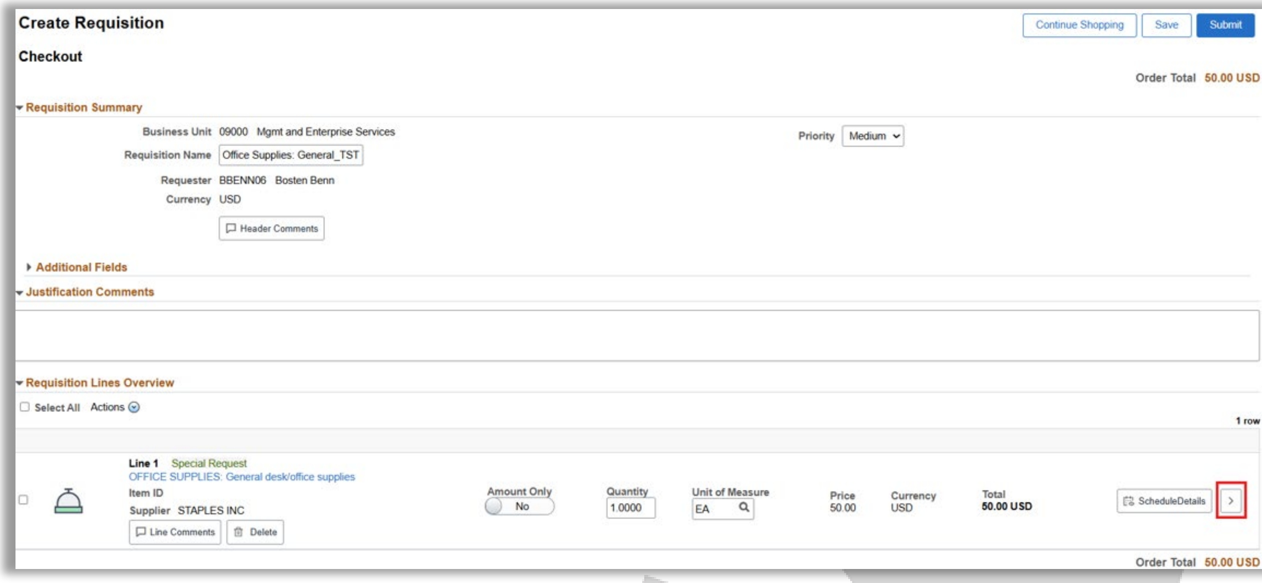
Asset Information Tab

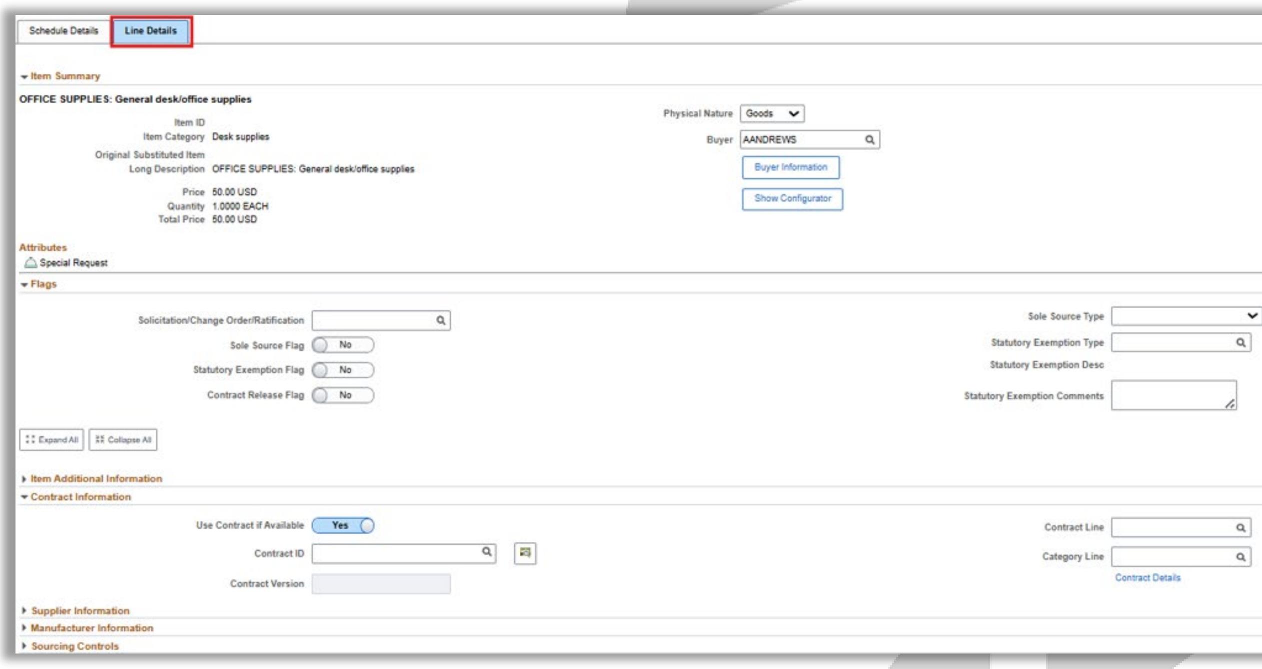


Enter asset information as necessary.

Click the **Done** button to return to the Checkout page.

Line Details Page

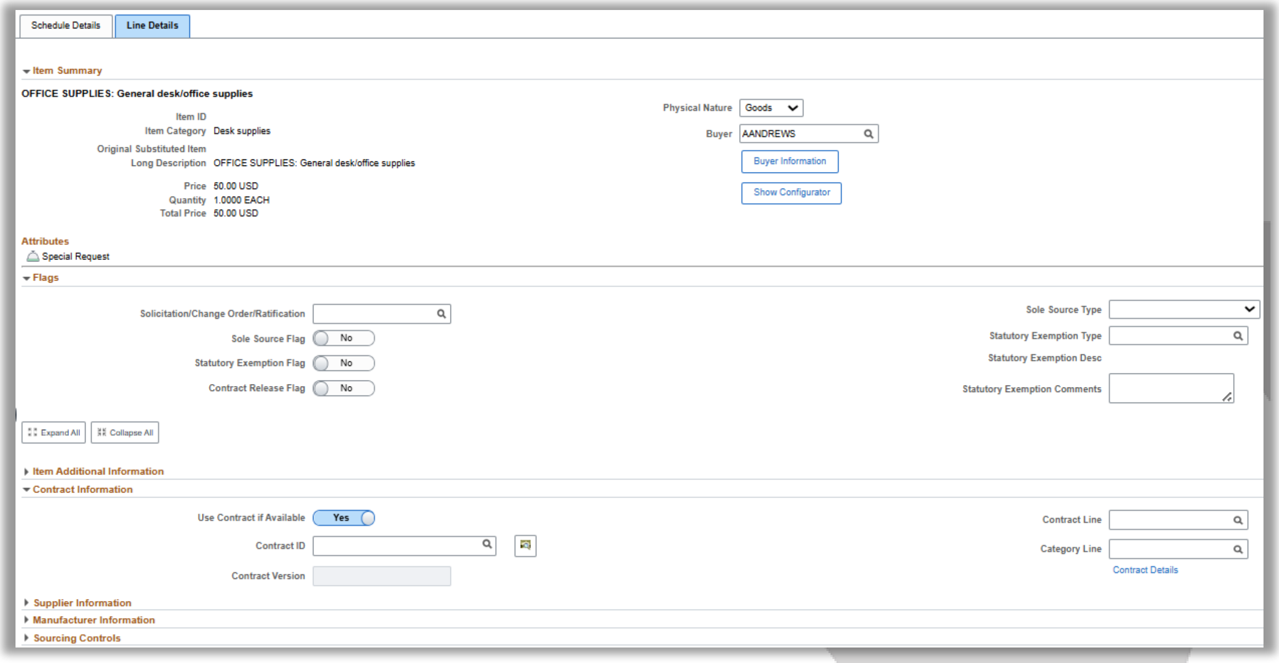




The Line Details page can be accessed in two ways:

1. **Click** the **Right Arrow** icon, found in the Requisition Line Overview of the **Checkout page**.

2. **Click** the Line Details tab, found at the top of the **Schedule Details page** .

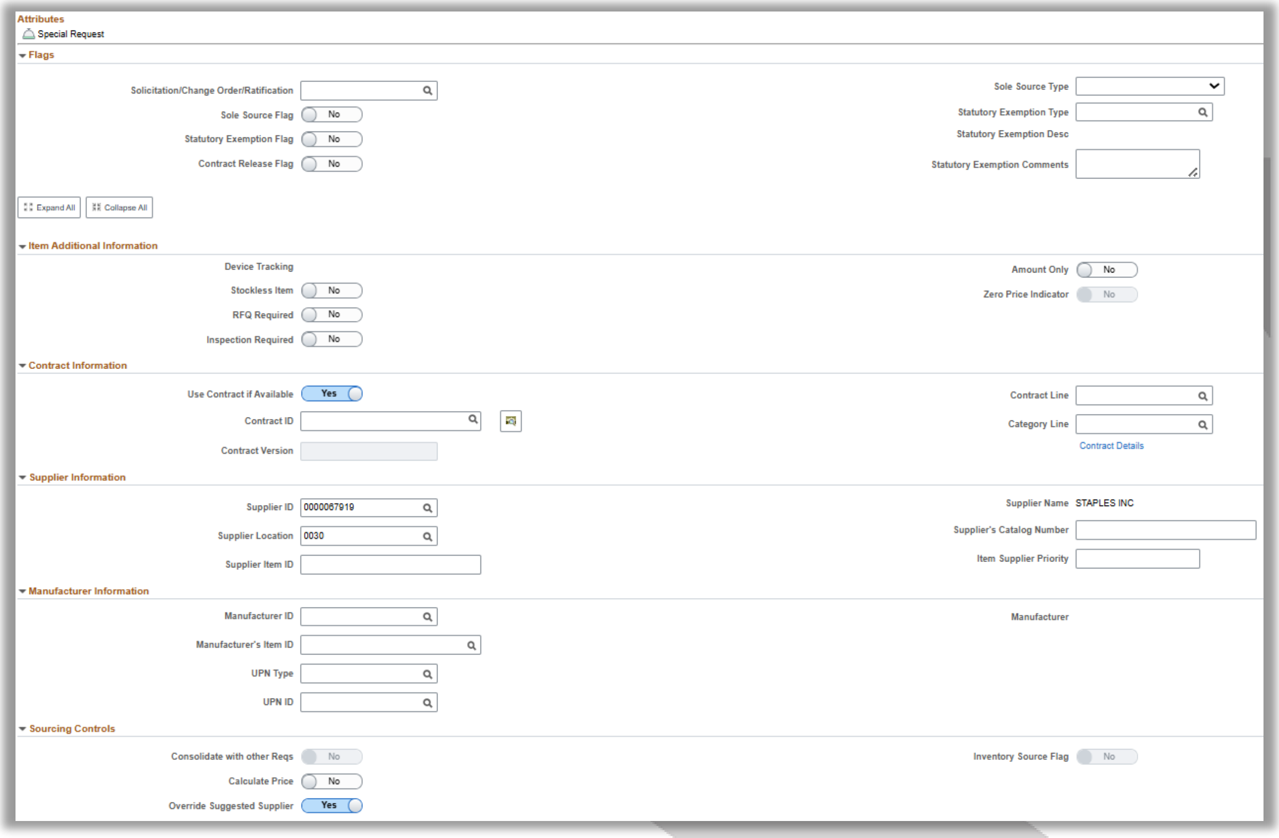


Item Summary

Physical Nature: Select to indicate whether the object is a physical good or service.

Buyer: Select a buyer for the requisition line. If you select a new value on the requisition that is tied to a different default buyer (item, supplier, or category, for example), the value in this field is overridden with the new default buyer value. The buyer's name appears in the Name field after you select the buyer.

Attributes



Click the **Expand All** button to view all additional information fields.

Enter and **Select** options as necessary for the Requisition.

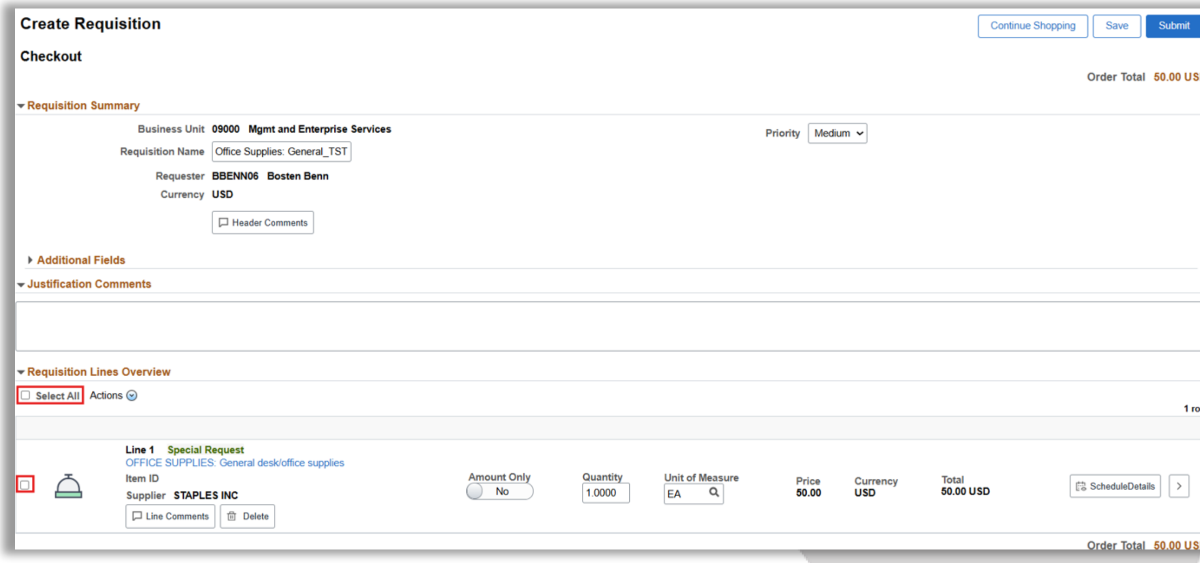
Amount Only Option - Select Yes if the line is an amount only line. If selected, the quantity is set to 1.

Use Contract if Available - Select this check box to:

- Have the system use the contract ID that you have entered here in the Contract ID field.
- Have the sourcing process find the best contract for this requisition line when you have left the Contract ID field blank.
- Deselect this check box to not use contract pricing for the requisition line.

Click the **Done** button to return to Checkout page.

Step 5 – Submit Requisition



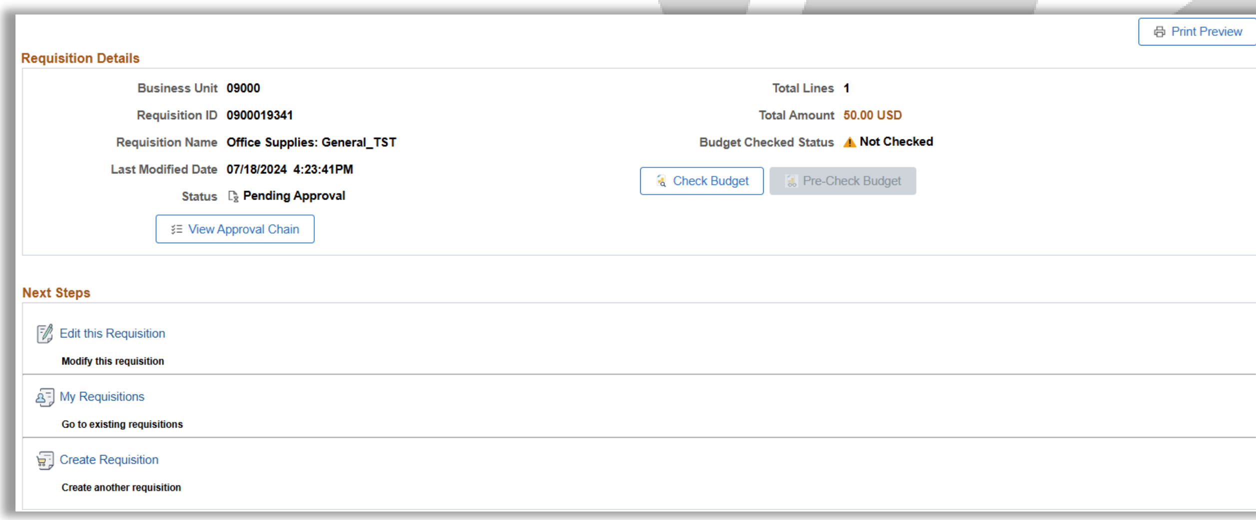
After reviewing Line information and creating Schedule/Distribution information, the Requisition can be submitted for approval.

Click the Radio Box on the left side of the appropriate line or **click** the Radio Box next to "Select All" to select all lines.

Click the **Save** button to save the requisition for submittal later.

Click the **Submit** button to submit the selected lines for approval.

Checkout Confirmation



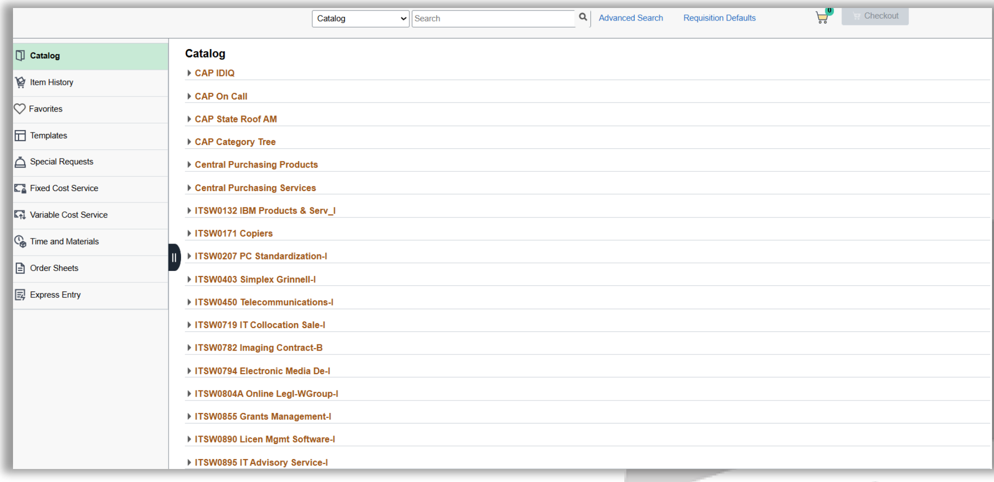
Click the **View Approval Chain** button to view approval routing information.

Creating the Requisition (Item ID)

Complete Step 1 illustrated above (Pages 6-9).

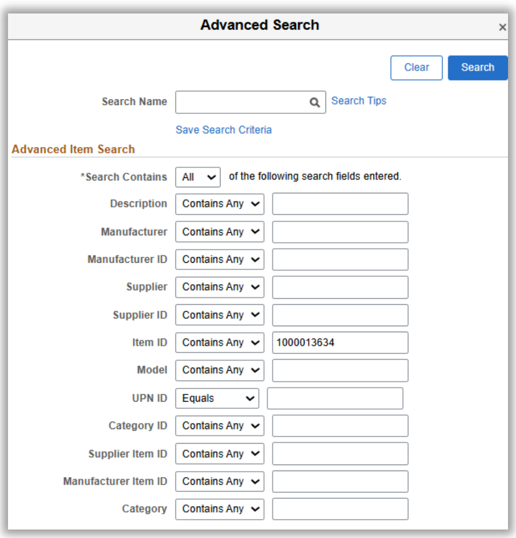
Step 2: Add Items and Services

Advanced Search Link



If the Item information is known, it can be searched for using the Advanced Search link at the top of the page.

Click the Advanced Search link.



Advanced Search page displays. **Enter** any information known about the Item to narrow the search results.

Click **<u>Search</u>** button.

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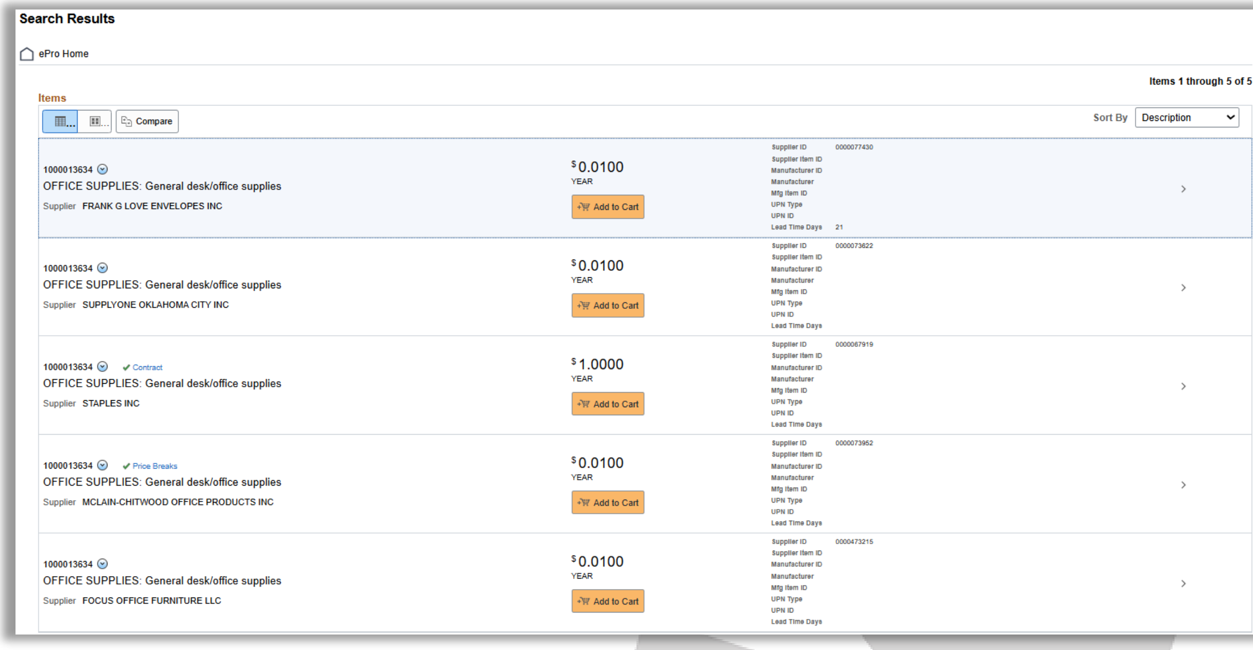
Step 3 - Add to Cart and Checkout



To view the item details, **click** the appropriate line.

Click the **<u>Add to Cart</u>** button for the appropriate Item.

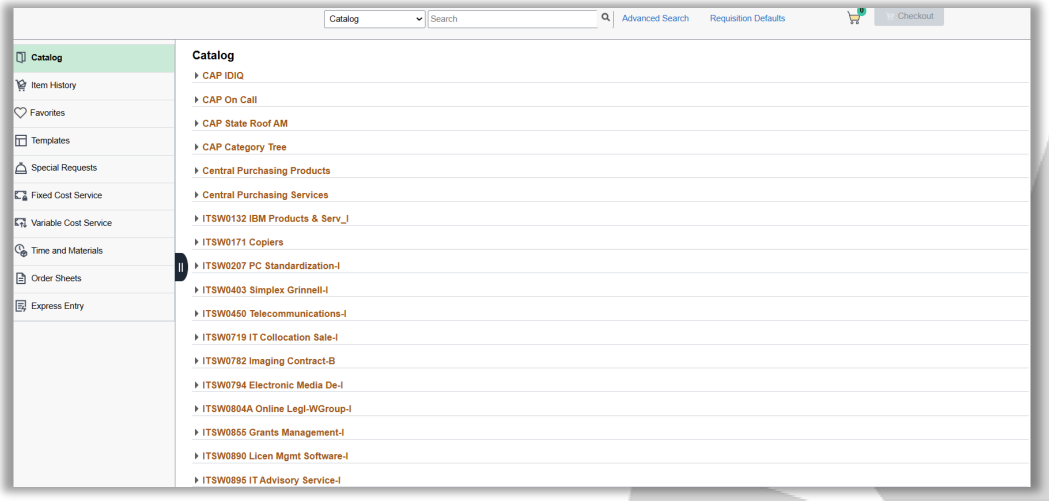
The cart icon will show how many lines are included in the requisition. When finished entering lines, select the **<u>Checkout</u>** button.

<u>Complete Steps 4 and 5 shown above to submit the Requisition. (pages 18-26).</u>

Creating the Requisition (Catalog)

Complete Step 1 illustrated above (Pages 6-9).

Step 2: Add Items and Services

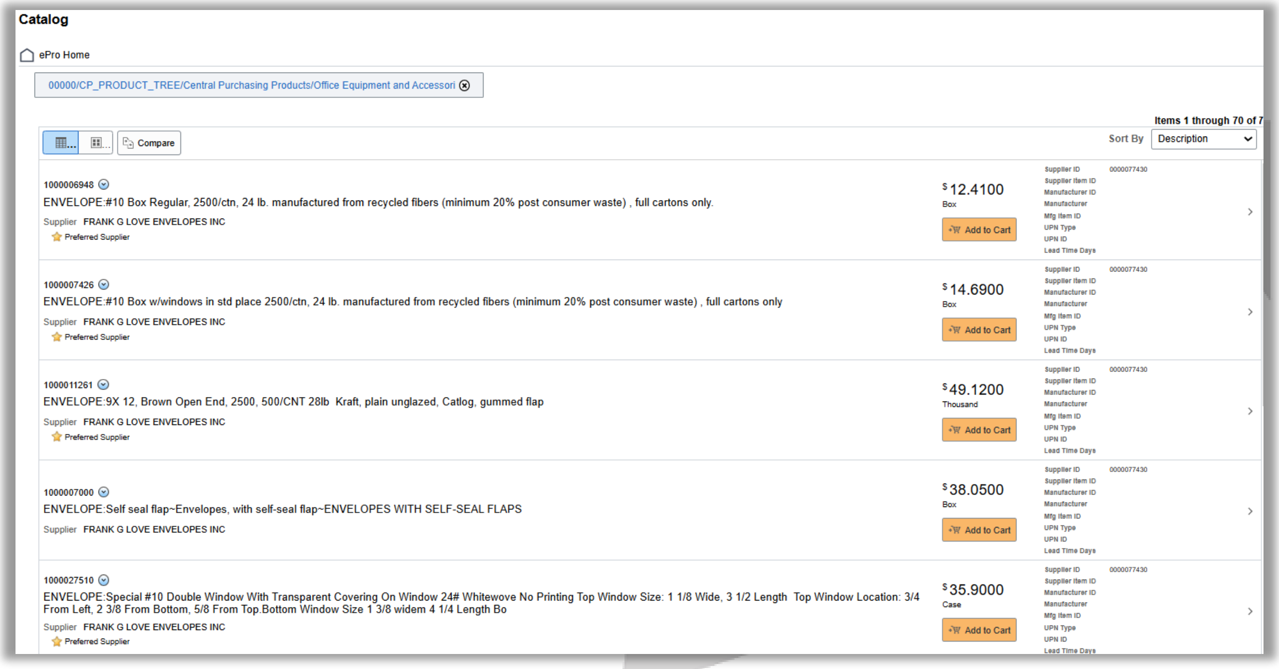


From the Create Requisitions page, **select** the **Catalog** section in the left window pane menu.

Click the appropriate Catalog to drill down to find the ItemID.

For this example, **Central Purchasing Products** was expanded to select Office Equipment and Accessories.

Step 3 - Add to Cart and Checkout



The **Sort By** dropdown menu can be used to sort items by:

- Description
- Price – High to Low
- Price – Low to High

Click the **<u>Add to Cart</u>** button on the appropriate Item line to add the item to the cart.

The cart icon will show how many lines are included in the requisition. When finished entering lines, select the **<u>Checkout</u>** button.

<u>Complete Steps 4 and 5 shown above to submit the Requisition. (pages 18-26).</u>

Part 2: Approving the Requisition

Workflow

- Workflow consists of taking a transaction through organization requisition approval process until accomplished or stopped.
- After requisition is created, system routes to approvers and into worklist.
- Pending approval action, approval workflow engine maintains overall state of transactions approval status, invokes routings and interacts with application.
- The system notifies approvers and reviewers of pending transactions that need attention.
- Approvers and reviewers access transaction details, provide comments, and act (approve, deny, hold or push back) for transaction.
- The system checks for additional routings in same routing path.
- If all steps have been completed for stage, then next step is started in next stage.

Approval Notifications

Email

Email approvals are designed to route approvals to Approver's email address when action is required. Approver must first log into system.

Worklist

Requisitions are routed to approver to act.

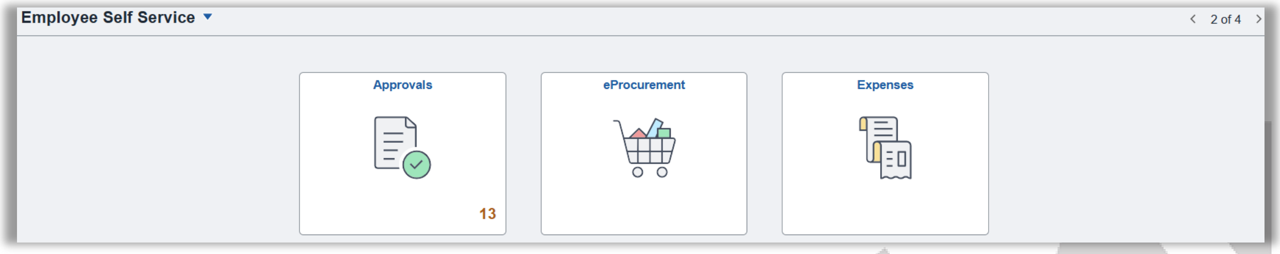
Requisition Approval – 5 Steps

Five major steps in approving an eProcurement requisition:

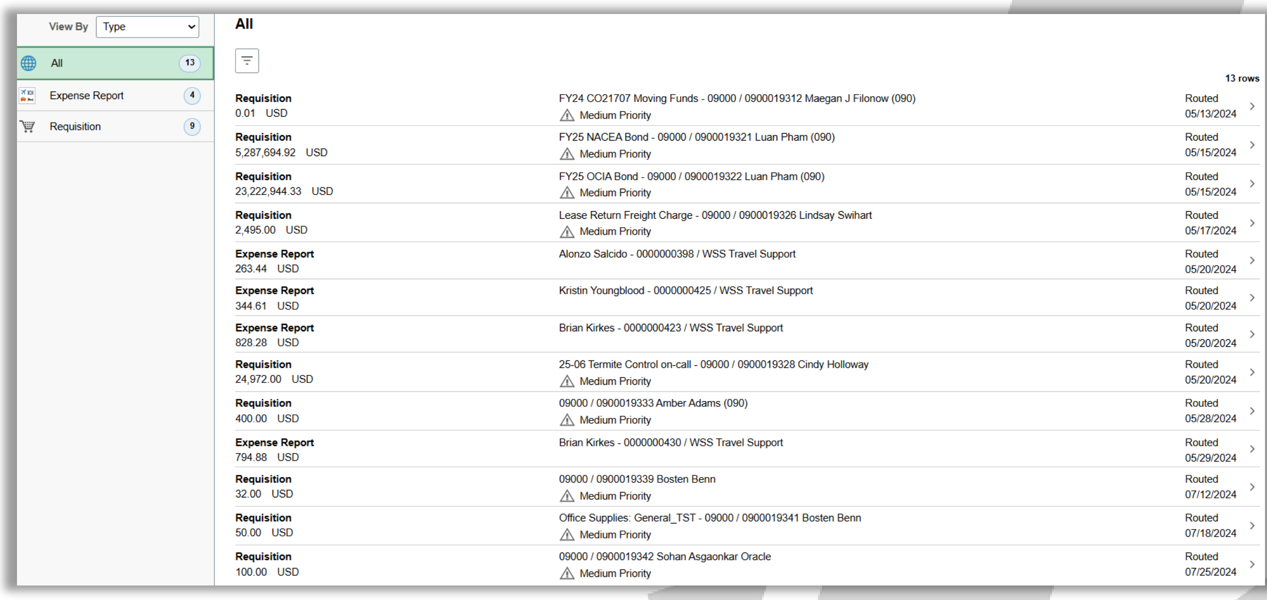
- Log into PeopleSoft.
- Select requisition to approve.
- Review requisition.
- Edit requisition if necessary.
- Approve/deny requisition.

NOTE: Requisition can also be put on hold or pushed back if needed.

Approvals Tile



From the **Home Page**, select the "Approvals Tile"

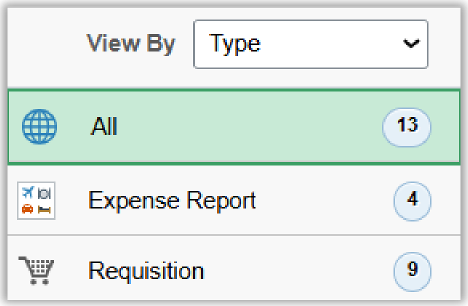


The Pending Approvals page is displayed. Use this page to view the Pending Approvals available for user's workflow role.

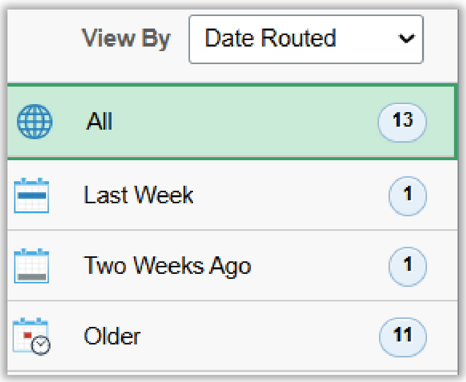
View By Dropdown

Use the **View By** dropdown to sort Approvals by:

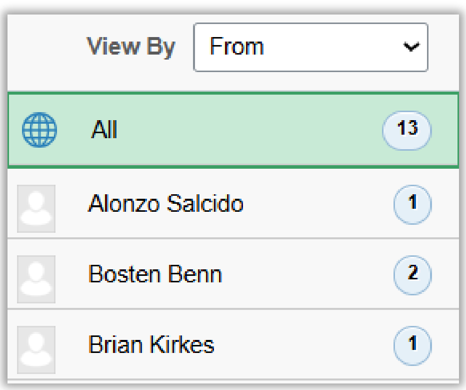
- Type – View Approvals by Type.



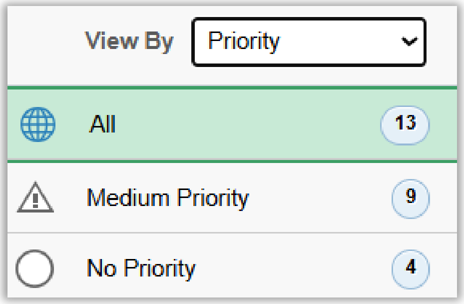
- Date Routed – View Approvals by Date.



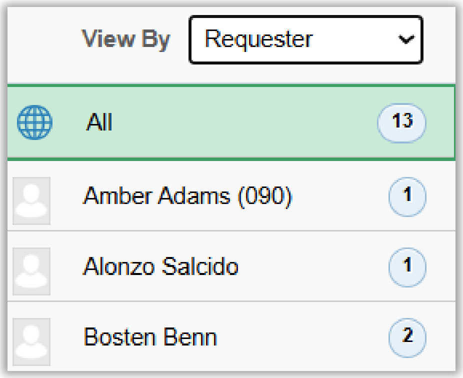
- From – View Approvals by user in previous approval level.



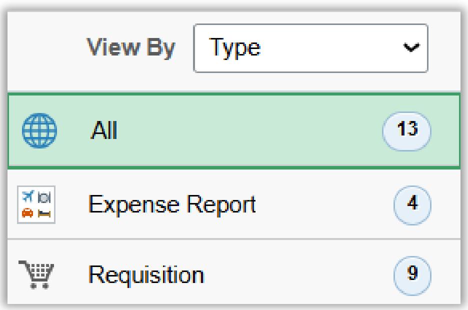
- Priority – View Approvals by Priority Level.



- Requester – View Approvals by Requester.

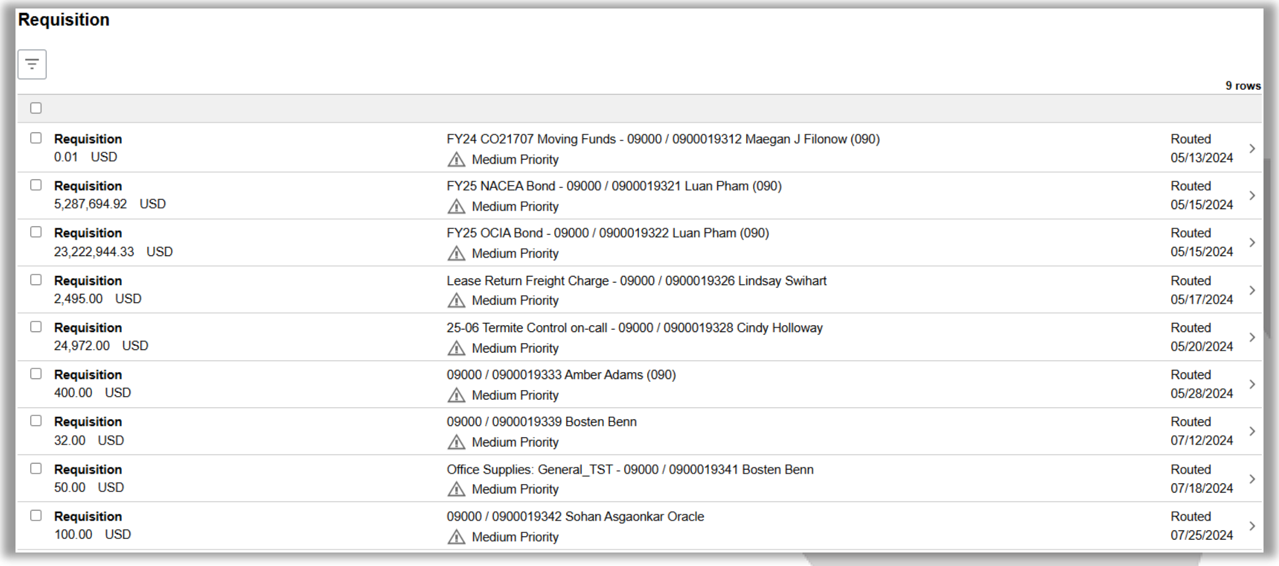


Select Type from the View By dropdown.



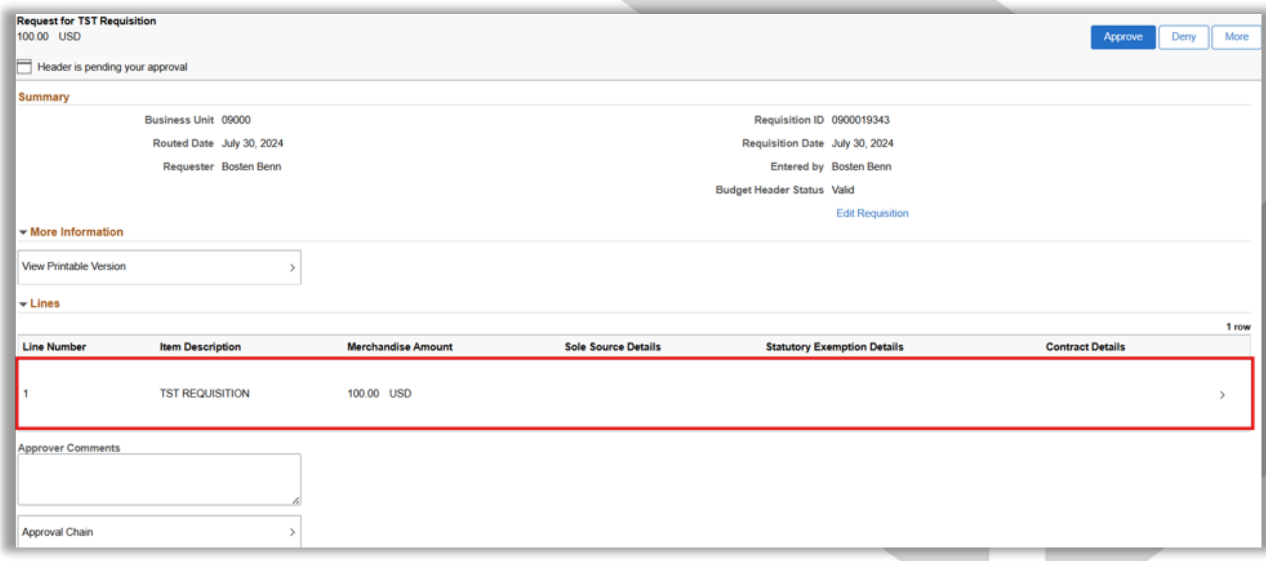
Select Requisition.

Requisition Approvals Page



The page displays Requisitions that have been routed to user for approval.

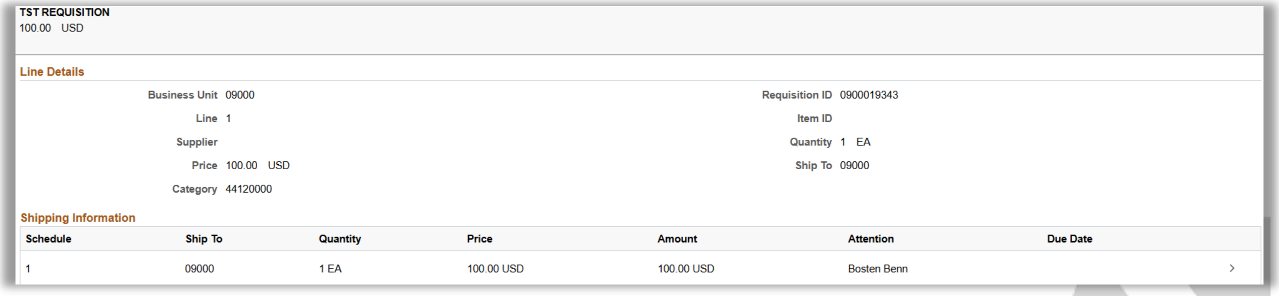
Click the **Right Arrow** icon on the right-hand side of the Requisition line, or anywhere on the line, to review for approval.



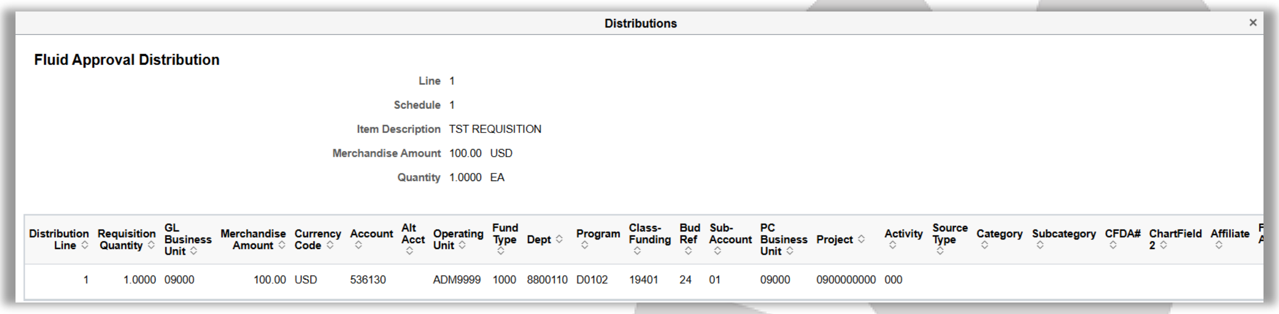
This page displays the Requisition for approval.

The **Pending Approvals** button will navigate back to the available approvals.

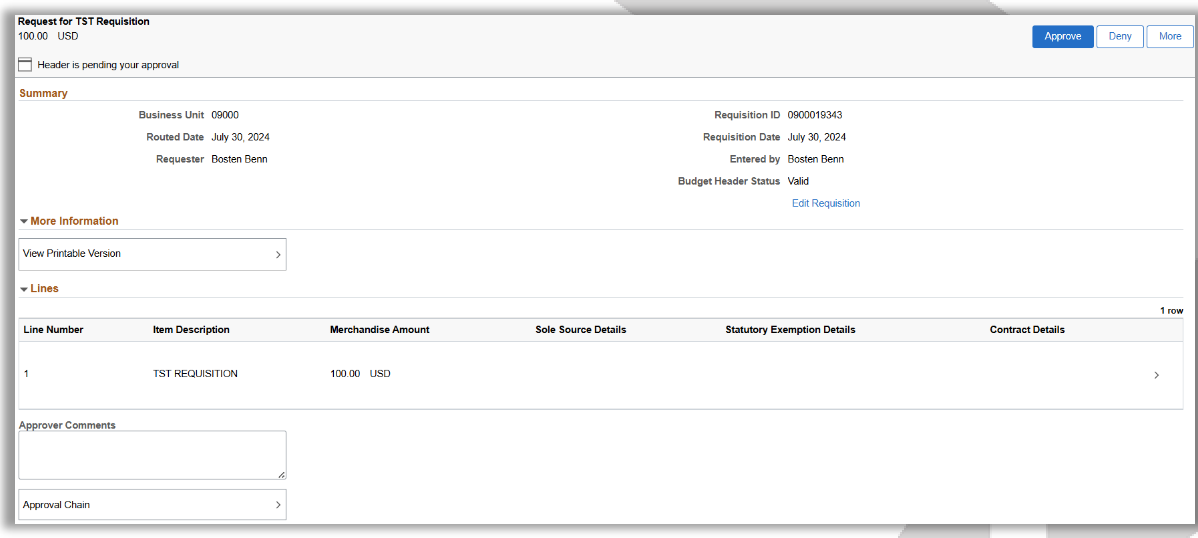
Click the **Right Arrow** icon on the right-hand side of the line, or anywhere on the line, to view the Approval Line Details page.



Click on the Schedule Line to view the Fluid Approval Distribution page.



After reviewing the Distribution and Schedule details, click the Back to Header link on the Approval Line Details page.

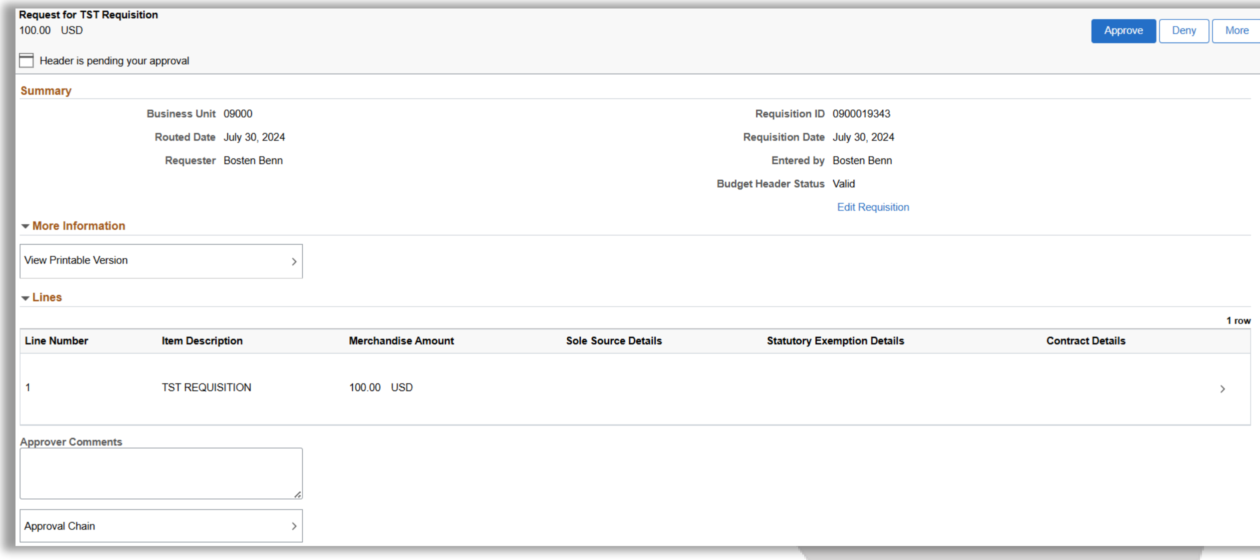


Click the **<u>Approve</u>** button to approve the Requisition. This will route the Requisition to the next user(s) in the approval chain.

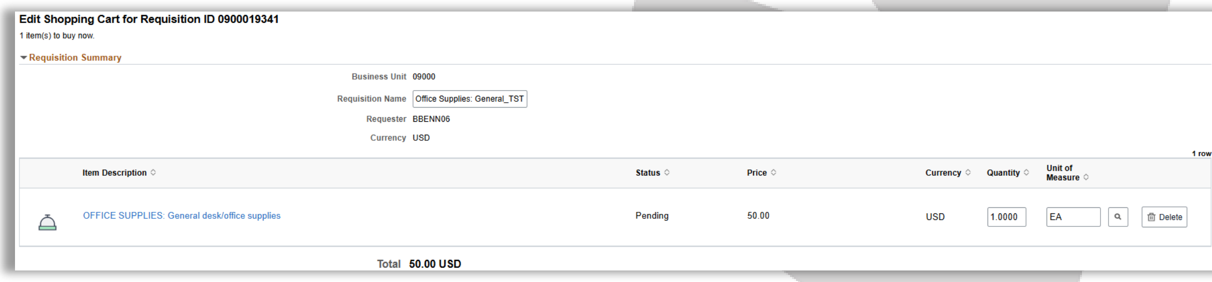
Requisitions can also be denied using the **<u>Deny</u>** button. If you select Deny, you must enter a reason in **Approver Comments** field.

The **<u>More</u>** button allows for the Requisition to be put on hold or pushed back.

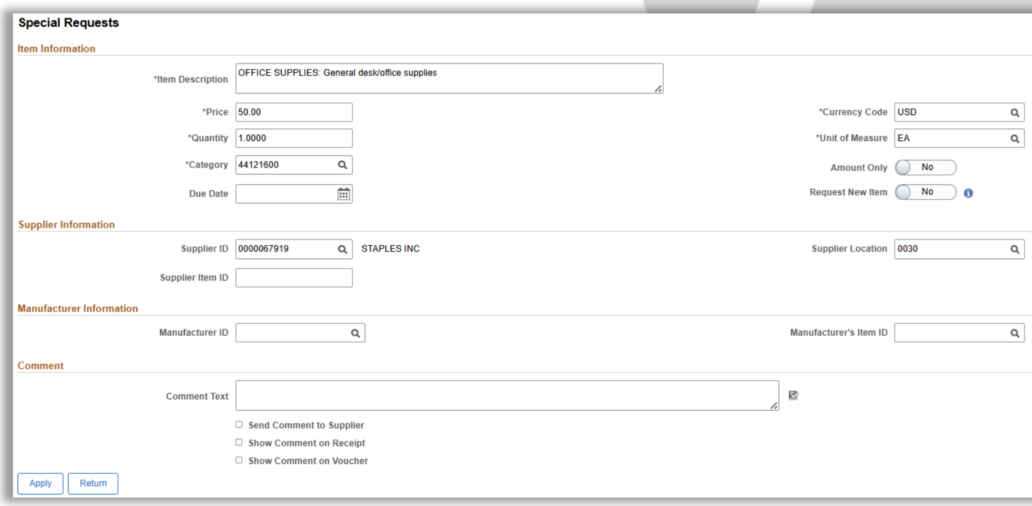
Edit Requisition in Approvals



From the Requisition Approval page, click the Edit Requisition link.

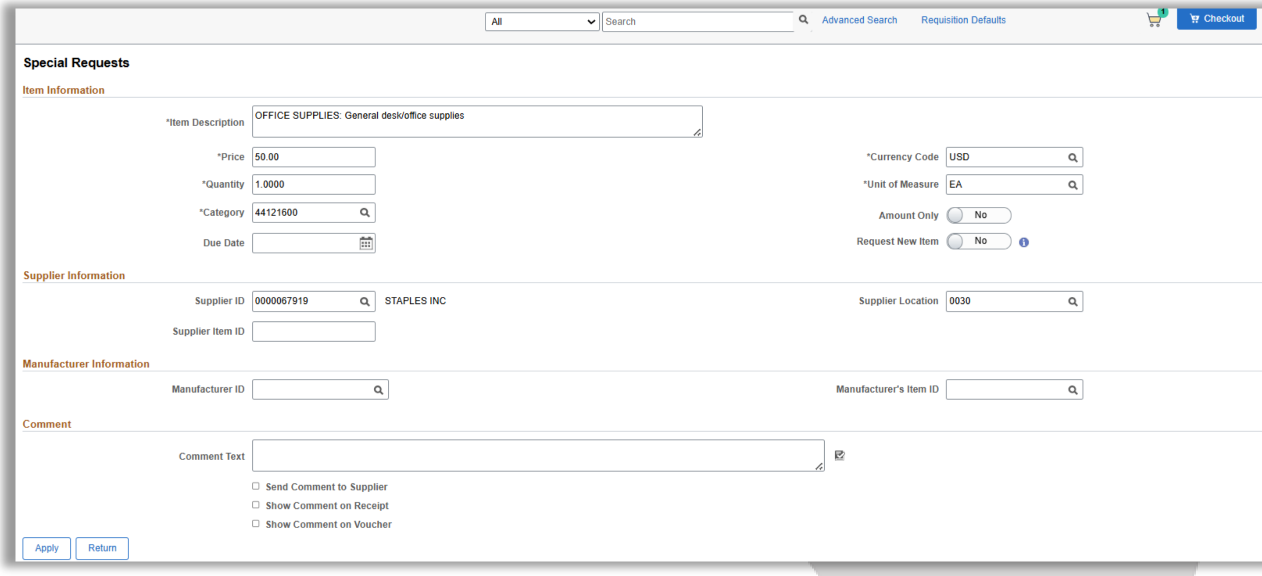


Click the **Item Description** hyperlink.

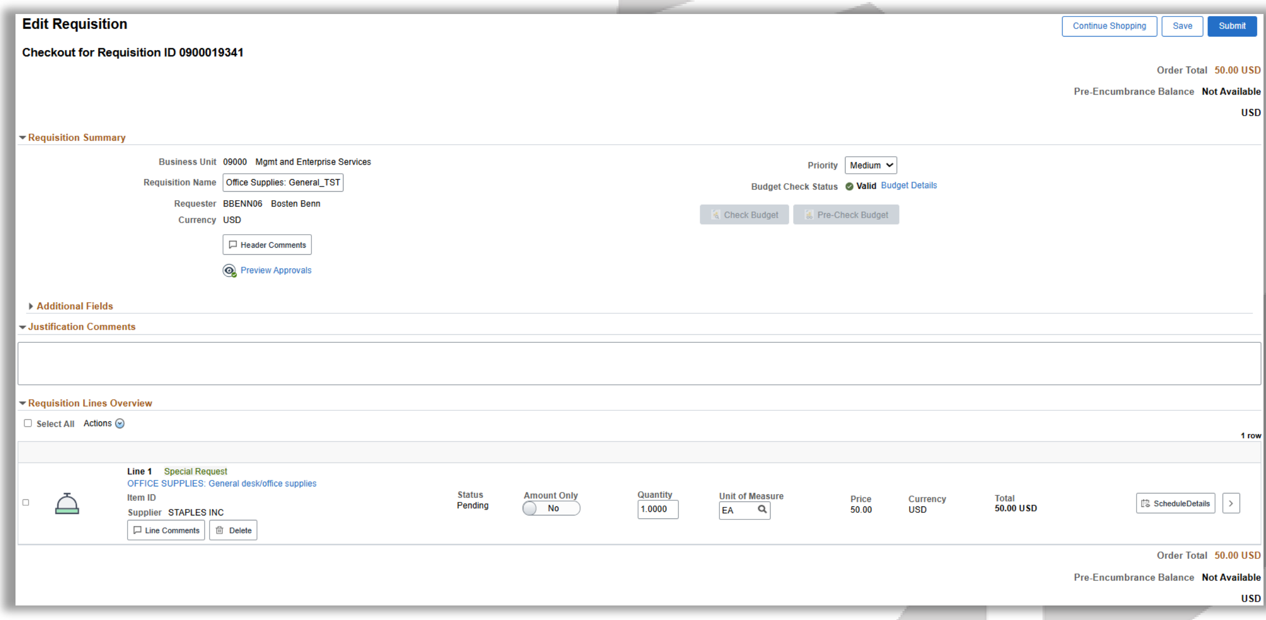


The Requisition page is displayed. From this page, the user can edit the requisition as necessary before approval.

Edit Requisition – Funding Profile

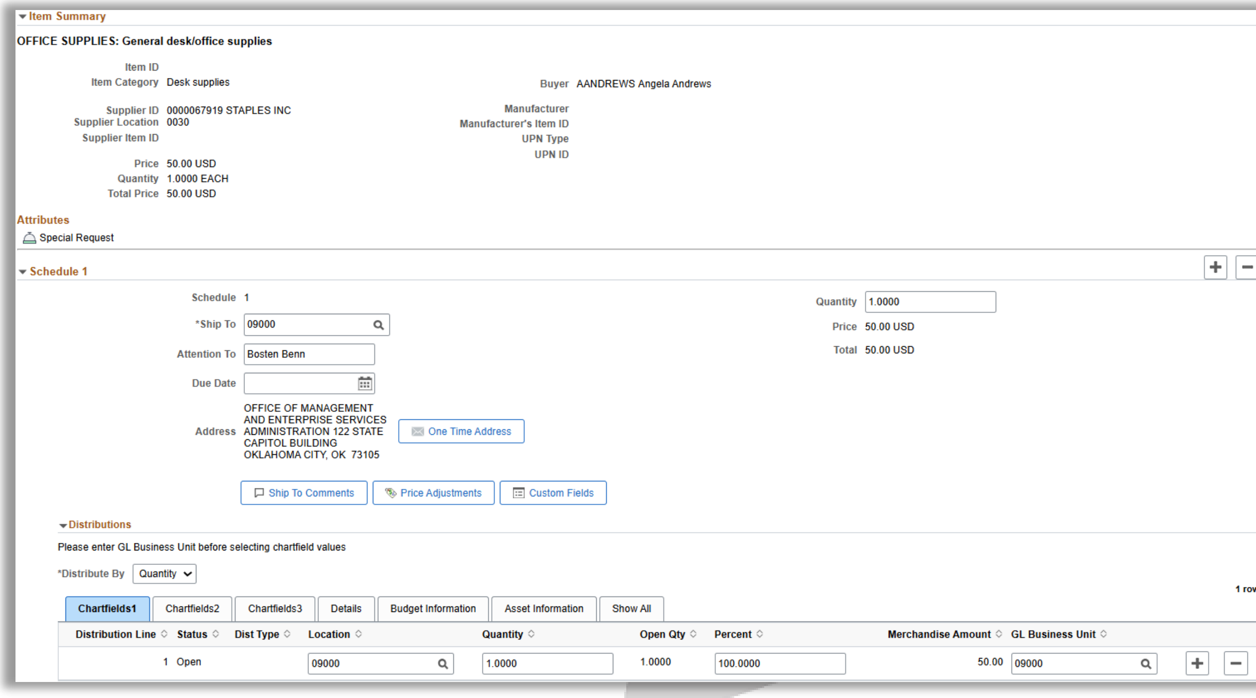


To edit the funding profile, **click** the **Checkout** button.



Edit Requisition page is displayed. **Click** the **Schedule Details** button to edit the Schedule information.

Schedule Details Page



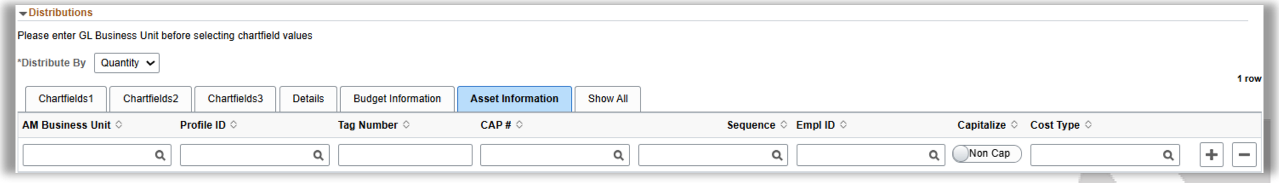
Select **Chartfields 2** Tab to edit:

Account.
Operating Unit.
Fund Type.
Department.
Class Funding.
Budget Reference.
PC BU.
Project.
Activity.
Category

Click the **Plus (+)** icon or **Minus (-)** icon to add or delete a distribution line.

Click the **Asset Information** Tab.

Edit Requisition – Asset Information

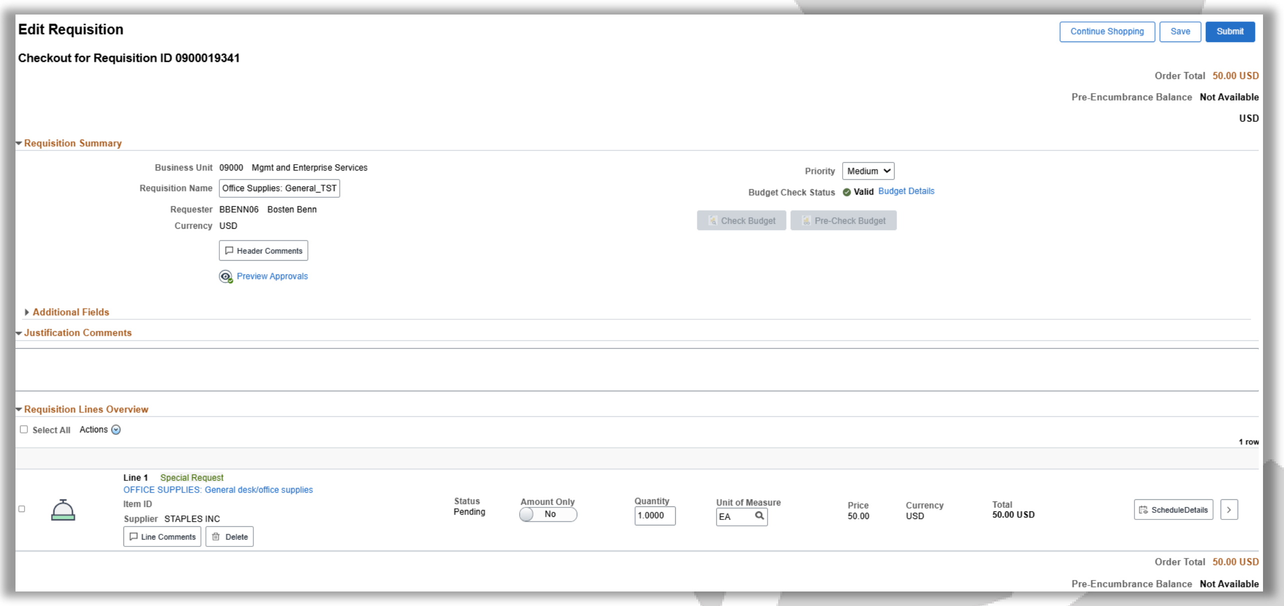


AM Business Unit – The Business Unit responsible for Asset.

Profile ID – Selected from a list.

Select the **Profile ID** looking glass for a list to choose from.

After updating funding and asset information as necessary, click the **Done** button.



Click the **Save** button to save changes and return to submit later.

Click the **Submit** button to submit changes made to Requisition.

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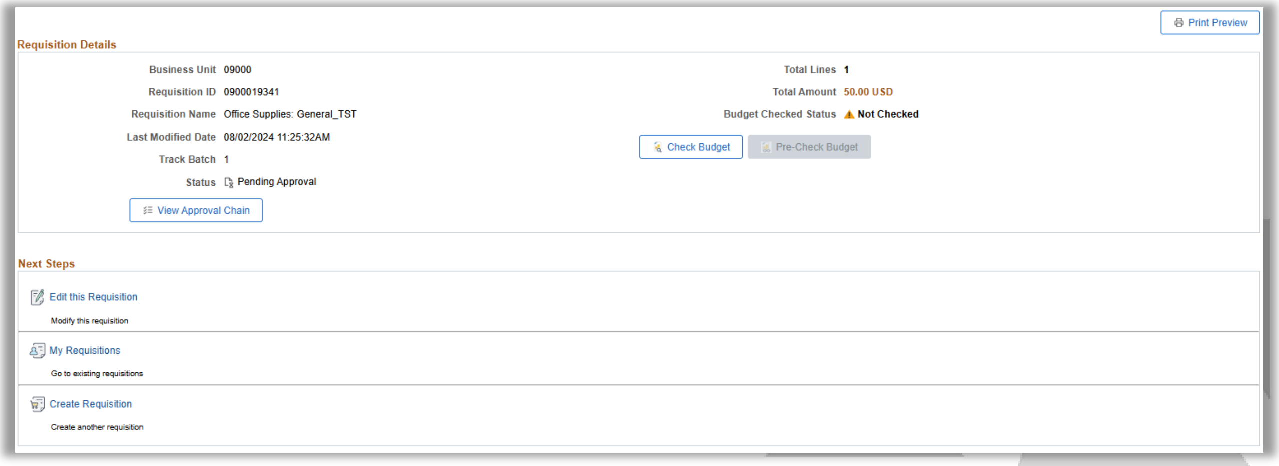
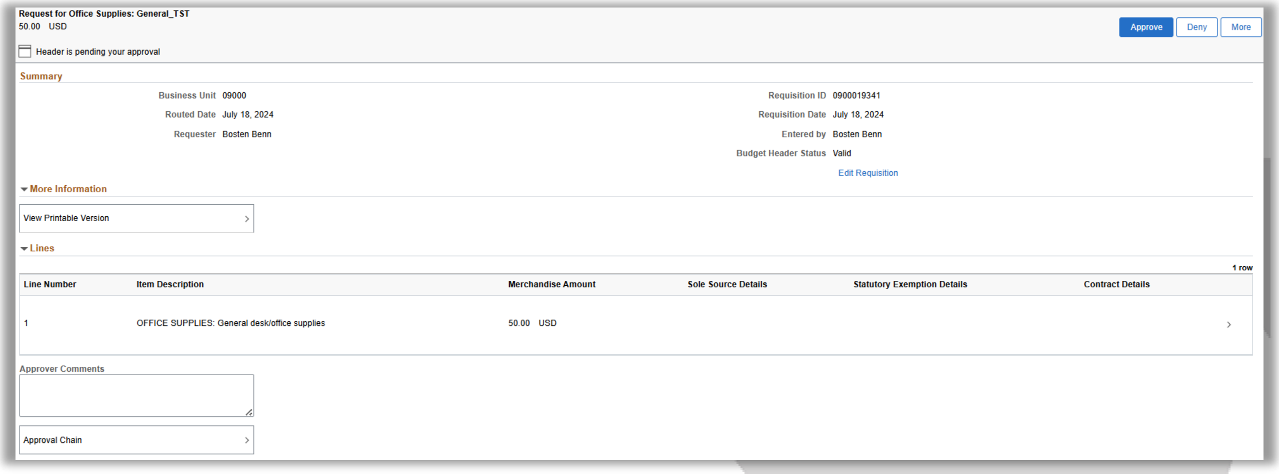
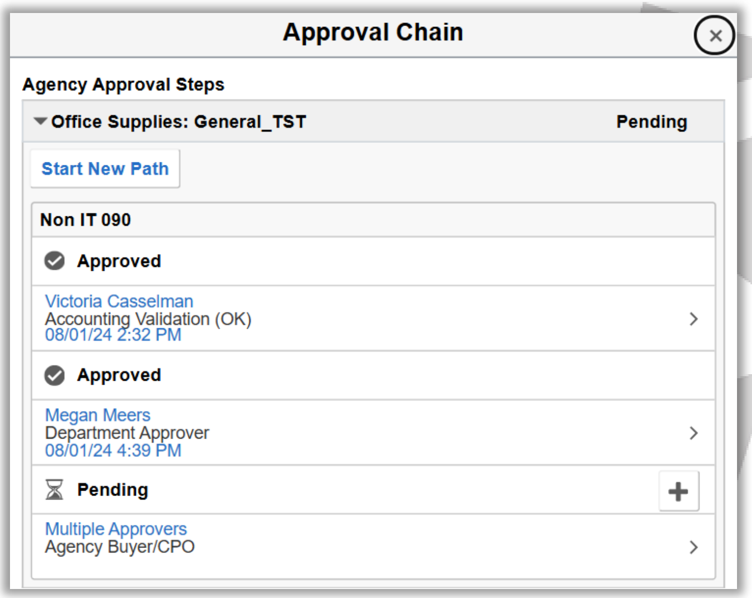


Click the **Check Budget** button to check budget following the changes made to Requisition.

Workflow Ad Hoc Feature



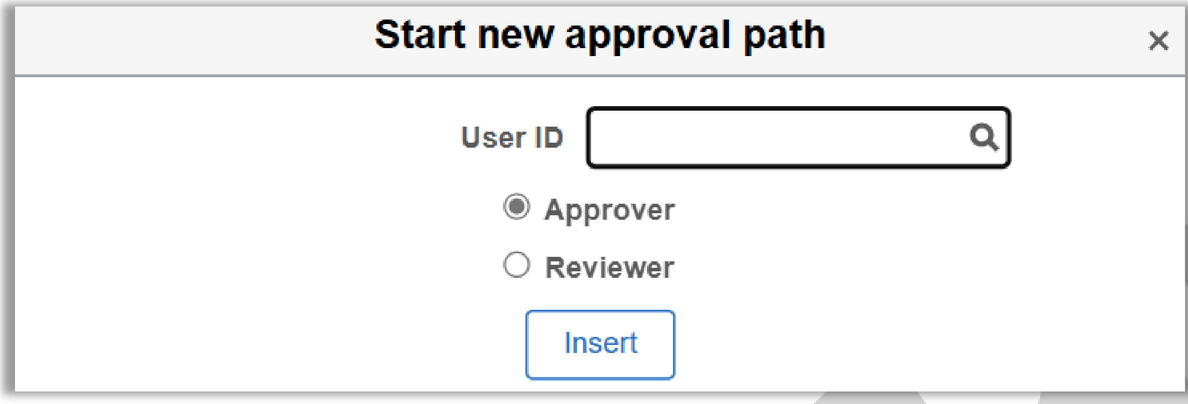
From the Requisition approval page, **click** the **Approval Chain** button to view the Approval Chain.



Click the **Start New Path** button to add an additional approver or reviewer.

The **Add** icon will insert a new approver or reviewer on the selected approval level.

Approvers and reviewers must be added prior to approving or denying requisition.



Enter the PeopleSoft User ID of the user you wish to add as Approver or Reviewer.

Select option to indicate either Approver or Reviewer.

Select the **Insert** button.

FAQ's

1

Question: What triggers the approval path workflow?

Answer: Selecting Save and Submit for workflow to start. Category code and Department ID (5-digit agency ID) determine workflow path and approvers it routes to.

NOTE: All changes for ePro requisitions must be completed in eProcurement and not in Purchasing.

2

Question: What would stall the requisition from moving through the approval path workflow?

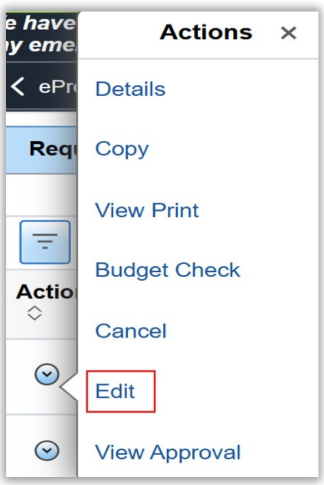
Answer: Nothing will stall approval path.
• Will always generate.
• Will either route to correct people or not.
  • If not routing to correct people, information on requisition is incorrect, i.e., category code or department ID.
• If path delayed:
  • Approvers in path are not approving it or requestor hasn't provided documentation.

3

Question: How does the user edit a requisition after starting workflow?

Answer: If requisition has not been sourced to a PO, navigate to **eProcurement Tile > My Requisitions,** then click **Filter** button to **enter** filter criteria**.**

Select edit from the left side "Action" drop-down



4

Question: Can the user add attachments without starting requisition over?

Answer: Yes

5

Question: Why is it important to use the correct category code?

Answer: The user cannot save a requisition without a Business Unit or category code. Selecting correct category code ensures requisition routes to appropriate approver.

6

Question: What changes would start requisition over if the user saved changes after starting workflow?

Answer: A dollar or quantity change to requisition.

7

Question: How can a requisition be restarted after starting in workflow?

Answer: Change requisition amount by a penny; save and submit change.

8

Question: How does the user ensure they are using the correct statewide contract?

Answer: The user will not be able to add/attach contract to the requisition if not using correct supplier, category code or UOM.

NOTE: If the PeopleSoft contract number is not known, it can be looked up in PeopleSoft or on OMES website.

Security Provisioning

- OMES Form 301 ePro
- Contact OMES Security Provisioning to access the correct Form.

LEARN Transcript

Verification of attendance

- Create and attach your LEARN transcript after completing OMES Form 301 ePro.
- Submit transcript and form via email to whomever you have been instructed to do so.
- Contact procurement.training@omes.ok. gov for instructions creating transcript, if needed.

Claim 2 CEUs for this training

- Training will automatically post to your LEARN transcript after completion.
- Save transcript to your CPO verification of attendance folder you created for yourself. Ensure your name is in the top left corner of the transcript.
- If claiming CEUs as a CPO:
- Attach transcript as verification of attendance.
- Mark 2 in appropriate place on Form 006.
- When your CPO two-year report is completed, send to: procurement.training@omes.ok.gov.

Conclusion – PeopleSoft Training

- For in-depth PeopleSoft training, access the PeopleSoft Financials 9.2 User Guide at: Peoplesoft FINANCIALS 9.2 User Guide: Navigating the new Fluid User Interface