OMES Agency Business Services requisition request user guide

Overview

OMES Agency Business Services processes requisition requests for specific agencies. This guide details the process of how to submit a requisition request for a new purchase order (PO) and a change order to a PO.

Procedure

Submitting a new PO:

1. Go to the following website: https://oklahoma.service-now.com/sp.
2. Login to the OMES Service Portal using your O365 email address.
3. Select Catalog at the top of the page.
4. Under Categories, select **Business Services**.

5. Select **New PO Request (ABS)**.

   **Note**: Fields with a red asterisk are required.

6. Select the agency name from the **Agency Name** dropdown. You may type in the agency ID or agency name to search.

7. Select the contact’s name from the **Contact Name** dropdown.

8. Enter the contact’s phone number in the **Agency Phone** field.

9. Enter the supplier’s name in the **Supplier Name** field.

10. Enter the supplier ID number in the **Supplier ID#** field.

**Note**: The first two fields, **Estimated Cost** and **Requested Date** are auto-filled fields. Estimated Cost is the total of the amount fields in the ABS Funding Information Set; the Requested Date field is auto-filled with the current date.
11. Enter the contract number in the **SW Contract #** field.

12. Enter the contact name for the supplier in the **Supplier Contact Name** field.

13. Enter the supplier’s email address or phone number in the **Supplier Email/Phone** field.

14. Select the correct dates to complete the **Contract Begin Date**, **Contract End Date**, **Agreement Period From** and **Agreement Period To** fields.

15. In the **Pay Terms** field, the default value is 45 days. Edit if necessary by entering the number (in days) into the field.

16. Enter a brief description in the **Brief Description of Purchase (PO Reference)** field.

17. Enter the justification for the request in the **Approval Justification** field.
18. In the ABS Funding Information Set section, select the **Add** button.

**ABS Funding Information Set**

![Add button](image)

19. Complete all the required fields, including: **Amount**, **Line**, **Distro Line**, **Account Code**, **Fund Type**, **Sub Account (if known)**, **Class Funding**, **Department**, **Oper Unit**, **CFDA**, **Bud Ref** and **Program Code**. Program Code has a dropdown list of valid values.

20. Select the **Add** button in the bottom right corner of the page.

The information you just added will appear in the ABS Funding Information Set section.

**ABS Funding Information Set**

![Add button](image)

Repeat steps 18-20 to add additional rows as needed.

21. Add attachments as needed by selecting the **Add attachments** icon.

22. Select the **Submit** button in the top right corner of the page.
You will receive a confirmation that your request was submitted, including your request number.

Submitting a change order to PO:
1. Go to the following website: https://oklahoma.service-now.com/sp.
2. Login to the OMES Service Portal using your O365 email address.
3. Select Catalog at the top of the page.
4. Under Categories, select **Business Services**.

5. Select **Change Order to PO Request**.
   
   **Note**: Fields with a red asterisk are required.
   
   **Note**: The Requested Date field is auto-filled with the current date.

6. Enter the PO number into the **PO #** field.

7. Select the agency name from the **Agency Name** dropdown. You may type in the agency ID or agency name to search.

8. Enter the contact’s phone number in the **Agency Phone** field.

9. Enter the supplier’s name in the **Supplier Name** field.

10. Select the contact’s name from the **Contact Name** dropdown.
11. Enter a brief description in the **Brief Description of Purchase (PO Reference)** field.

* Brief Description of Purchase (PO Reference)

12. Enter the justification for the request in the **Approval Justification** field.

* Approval Justification

13. In the Change Order Funding Set section, select the **Add** button.

14. Complete all the required fields, including: **Line, Distro Line, Increase or Decrease Amount** and **Amount**.

15. Select the **Add** button in the bottom right corner of the page.

The information you just added will appear in the Change Order Funding Set section.

```
<table>
<thead>
<tr>
<th>Actions</th>
<th>Line</th>
<th>Distro Line</th>
<th>Increase or Decrease Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>001</td>
<td>002</td>
<td>Increase</td>
<td>600.00</td>
</tr>
</tbody>
</table>
```

Repeat steps 13-15 to add additional rows as needed.

16. Add attachments as needed by selecting the **Add attachments** icon.

17. Select the **Submit** button in the top right corner of the page.
You will receive a confirmation that your request was submitted, including your request number.

<table>
<thead>
<tr>
<th>Item</th>
<th>Stage</th>
<th>Price (each)</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Business Services - Change Order to PO</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: $0.00