

State of Oklahoma

COR130

Release of Statewide Contracts Manual
Office of Management & Enterprise Services



OKLAHOMA

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Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	03/17/2003	Initial Document
1.1	10/01/2007 9.0	Version Updated
1.2	05/01/2011	ADA Compliance
1.3	01/26/2021	Logo Change
2.0	11/18/2024	Upgrade Update (Fluid Tiles)



Statewide Contracts

Overview

The Office of Management and Enterprise Services SW Contract Search website: [Central Purchasing: Division of Office of Management and Enterprise Services \(OMES\) - Solicitations \(ok.gov\)](#)

Statewide Contract Search

[Advanced Search](#)

Enter Requisition Number: Enter Keyword:

[Search](#) [Clear](#)

<< [1] [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) [14](#) [15](#) [16](#) [17](#) [18](#) [19](#) [20](#) [21](#) >>

SW Number	Solicitation Number	Description	Amendments	Status	Closing Date	Closing Date Status	Agreement Date
SW0750B	SW0750B	Highway Guardrail Repair and	0	Awarded	10/11/2017	Changed	08/28/2024
SW0765	0900000532	Bread and Bakery Products	0	Awarded	05/05/2022	Original	06/30/2026
SW0133AM	Alvarez Ma	Non-IT Consulting Services	0	Awarded	11/27/2022	Original	06/30/2028
SW0196MM	0900000552	SW0196MM: Mowers, Golf	0	Awarded	09/15/2022	Original	02/07/2025
SW0115	SW0115	Longevity Recognition Pins	0	Awarded	08/11/2023	Original	08/15/2024
SW0185GP	EV00000317	SW0185GP- Great Plains, LLC. -	0	Awarded	10/19/2023	Original	11/05/2024
SW1050MAX	SW1050	DBITS-Maxim Consulting,	0	Awarded	03/12/2024	Original	03/31/2029
SW1190GD	SW1190GD	GovDeals - Online Auction	1	Awarded	07/01/2024	Original	09/01/2032
SW064	SW0064	Tissue, Paper Towels and	0	Awarded	-	Original	03/31/2020
SW0022	SW022	Office Supplies	0	Awarded	-	Original	06/30/2030
SW0078	SW078	Personal Hygiene Products	0	Awarded	-	Original	12/31/2020

Statewide Contract Search can be used to identify an Item ID, Category, or Supplier on Contract.

Enter a Requisition Number or Keyword as search criteria. Keywords can include a description of the item (i.e. heavy equipment, cement, books, consulting, etc...) or the SW contract number (i.e. SW0708, SW0817, etc...).

Click the **Search** button.



Statewide Contract Search

Advanced Search

Enter Requisition Number: Enter Keyword:

[Search](#) [Clear](#)

SW Number	Solicitation Number	Description	Amendments	Status	Closing Date	Closing Date Status	Agreement Date
SW1050SLA	SW1050	DBITS-Slalom, Deliverable Based Information	0	Awarded	04/18/2024	Original	03/31/2029

List of Contracts

[Return to Home](#)

From this page you can refine your search criteria or **click the [Solicitation Number](#) link.**

Solicitation Detail

Please use the 'Notify Me' button to be automatically made aware of any amendments to this particular solicitation. If you would like to be electronically notified of future opportunities for this or other type commodities, you will need to register with Central Purchasing by clicking on 'Vendor Registration' link. [Notify Me](#)

Agency: Central Purchasing Division Contract Type: Non-Mandatory Statewide

Solicitation Number: SW1050 SW Number: SW1050SLA Status: Awarded Closing Date Status: Original

Description: DBITS-Slalom, Deliverable Based Information Technology Services

Buyer: Asha Parks

Closing Date: 04/18/2024

Award Date: 08/07/2024

Contract Period Starting Date: 08/07/2024 Contract Period Ending Date: 03/31/2029

Agreement Period Starting Date: 08/07/2024 Agreement Period Ending Date: 03/31/2029

Attachments:

Attachment Title	Attachment Type	File Type	Comments
Slalom SW1050_Contract Award Summary	Other	pdf	Slalom SW1050_Contract Award Summary
SW1050 Slalom Master Agreement Exp3.31.25(part 1) - signed	Contract	pdf	SW1050 Slalom Master Agreement Exp3.31.25
SW1050 Slalom P57507 exp3.31.29 (part 1) - signed	Contract	pdf	SW1050 Slalom P57507 exp3.31.29

Attachments

Comments
Deliverable Based IT Services, Slalom Inc., SLALOM INC, Slalom, slalom, SW1050SLA, 1050SLA, SW1050, sw1050, 1050, DBITS, 1050sla 1050sla SW1050sla, SLA, P57507, 7507

Attachment links can be **clicked** to view more information.



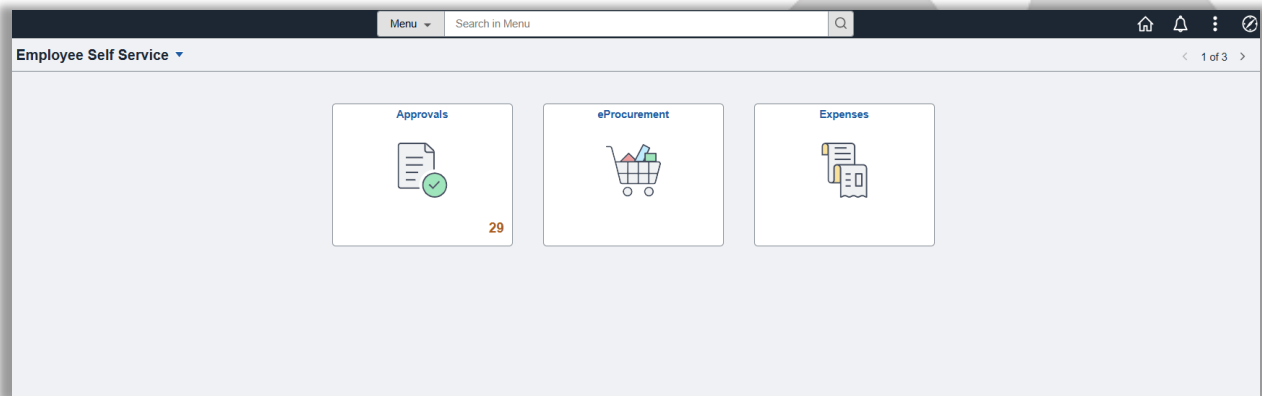
Releasing of Contracts from Requisitions

Overview

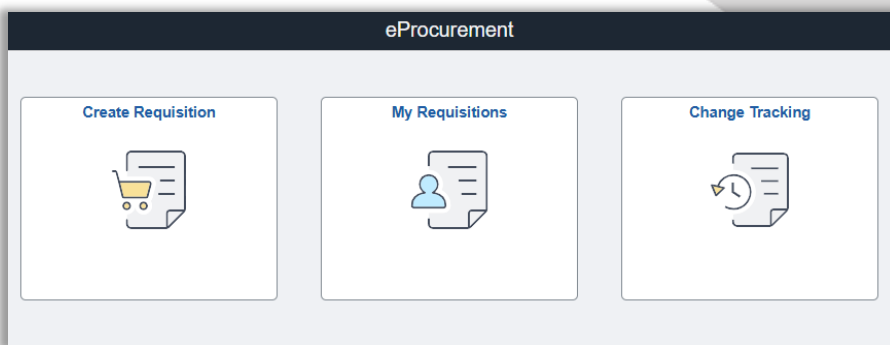
For Statewide contract purchases, a Purchase Order can be created directly without having to enter a requisition first. However, some agencies may still desire or require a requisition be entered in order to release the contract.

Create a Requisition

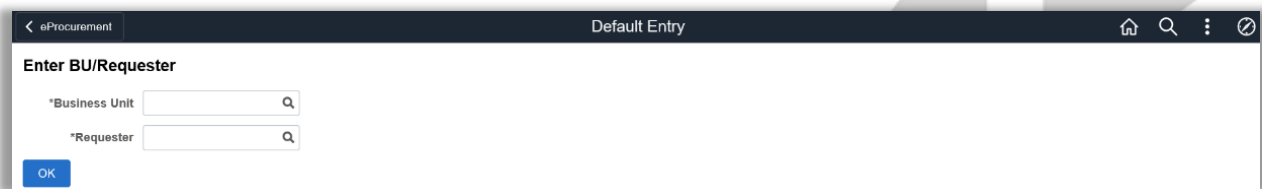
Navigation: *eProcurement Tile > Create Requisition Tile*



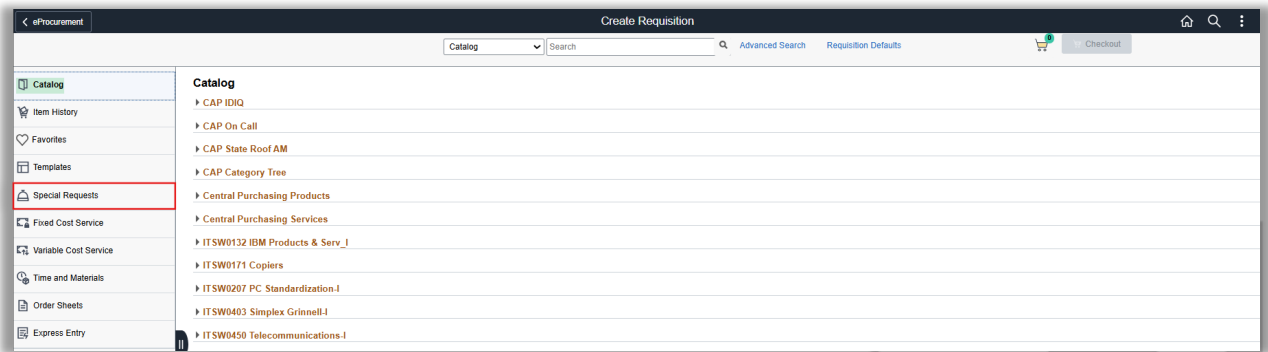
From the Home Page, **click** the [eProcurement](#) tile.



The eProcurement Menu opens. **Click** the [Create Requisition](#) tile.



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



The Create Requisition page is displayed. From this page, the user can select the method of requisition creation from the tiles on the left. The most commonly used method of requisition creation for Release of Statewide Contracts is “**Special Requests.**”

NOTE: There are multiple methods of Requisition creation found in the left panel menu including Special Requests, Express Entry, etc. For more information on other methods, see **COR452 ePro Requisition Manual.**

Click the Special Requests tile, outlined above, to enter the Special Requests page.



Special Requests Page

All fields marked with an asterisk “*” are required.

Under Item Information, enter an **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 and enter the **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** in the **Category** field.



Look Up Category

The screenshot shows the 'Look Up Category' interface. At the top, there is a 'Search Categories' section. Below it, the 'Search By' dropdown is set to 'Category'. The 'Category' input field is active, and a dropdown menu is open, showing 'Category' and 'Description' as search options. A 'Find' button is visible on the left. At the bottom right, it indicates '61250 rows'.

The Look Up Category page displays.

The user can search for a Category by the Category Code or by Description.

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 the category code is already known.

Click 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.

The screenshot shows the 'Look Up Category' interface after a search. A note at the top reads: 'Note: You may either Search or Browse to look up the appropriate category for your special request.' The 'Search By' dropdown is still set to 'Category', and the 'Category' input field now contains the code '60101725'. The 'Find' button is highlighted. Below the search area, a table displays the results. The table has three columns: 'Catalog', 'Category', and 'Description'. There is one row of results.

	Catalog	Category	Description
1	IT_CATALOG	60101725	Technology activity or resource

At the bottom right of the table area, it indicates '1 row'.

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



NOTE: Some category codes may show up in multiple trees (IT_CATALOG and CP_PRODUCT_TREE) like the example below. Make sure you select the correct tree in order for the requisition to route correctly.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ Search Categories

Search By

Category

Categories 2 rows

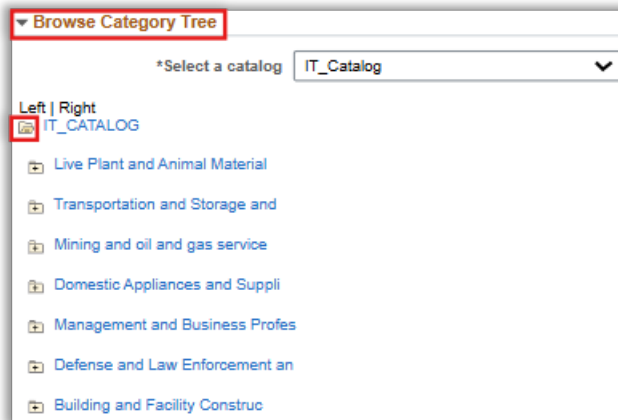
	Catalog	Category	Description
1	CP_PRODUCT_TREE	30111600	Cement and lime
2	IT_CATALOG	30111600	Cement and lime

Alternatively, the user can utilize the Browse Category Tree section to drill into catalogs and find the appropriate Category.

Browse Category Tree

In addition to searching directly for category codes, the user can search for the category code by using the **Browse Category Tree** and selecting a catalog from the dropdown menu.

NOTE: The Browse Category Tree section appears collapsed initially. **Click** the Arrow to the left of the Header or **click** the Header itself, outlined below, to expand the section.



After selecting the appropriate Catalog, the user can **click** the folder icons to expand the catalog.

Expand the sections as necessary, then **click** the **Category** hyperlink to default the category code onto the Special Requests page.



Supplier Information

The screenshot shows the 'Special Requests' form with the following fields:

- Item Information:**
 - *Item Description: Training
 - *Price: 100
 - *Quantity: 1
 - *Category: 00101725
 - Due Date: [calendar icon]
 - *Currency Code: USD
 - *Unit of Measure: EA
 - Amount Only: No
 - Request New Item: No
- Supplier Information (highlighted with a red box):**
 - Supplier ID: [input field with looking glass icon]
 - Supplier Item ID: [input field]
 - Supplier Location: [input field with looking glass icon]
- Manufacturer Information:**
 - Manufacturer ID: [input field with looking glass icon]
 - Manufacturer's Item ID: [input field with looking glass icon]
- Comment:**
 - Comment Text: [text area]
 - Send Comment to Supplier
 - Show Comment on Receipt
 - Show Comment on Voucher

Buttons: Add to cart, Cancel, Done, Search, Advanced Search, Requisition Defaults, Checkout.

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

If unknown, the Supplier can be searched for using the looking glass icon in the **Supplier ID** field.

Click the looking glass icon to search.

The 'Supplier Lookup' dialog box contains the following fields:

- Supplier SetID: 00000
- Supplier ID: [input field]
- Supplier Name: [input field]
- Short Supplier Name: [input field]
- Alternate Supplier Name: [input field]
- Country: [input field with looking glass icon]
- City: [input field]
- State: [input field with looking glass icon]
- Postal Code: [input field]

Buttons: Search, Clear, Cancel, Done.

Enter any information known about the supplier. The Supplier ID field was populated for this example.

Click the **Search** button.



▼ Search Results								1 row
Supplier ID ◊	Supplier Name ◊	Short Supplier Name ◊	Default Location ◊	Address Line 1 ◊	City ◊	State ◊	Postal Code ◊	
0000585563	SLALOM INC	SLALOM INC-001	0001	PO BOX 101416	PASADENA	CA	91189-0025	

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

Select the appropriate supplier. The Supplier information will default onto the Special Requests page.

Add to Cart and Checkout

The screenshot shows the 'Special Requests' form with the following fields and values:

- Item Information:**
 - *Item Description: Training
 - *Price: 100
 - *Quantity: 1
 - *Category: 00101725
 - Due Date: [Calendar icon]
 - *Currency Code: USD
 - *Unit of Measure: EA
 - Amount Only: No
 - Request New Item: No
- Supplier Information:**
 - Supplier ID: 0000565563 (SLALOM INC)
 - Supplier Location: 0001
 - Supplier Item ID: [Empty]
- Manufacturer Information:**
 - Manufacturer ID: [Empty]
 - Manufacturer's Item ID: [Empty]
- Comment:**
 - Comment Text: [Empty]
 - Send Comment to Supplier:
 - Show Comment on Receipt:
 - Show Comment on Voucher:

The 'Add to cart' button is highlighted with a red box at the bottom left.

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.

The screenshot shows the 'Special Requests' form with the following fields and values:

- Item Information:**
 - *Item Description: [Empty]
 - *Price: [Empty]
 - *Quantity: [Empty]
 - *Category: [Empty]
 - Due Date: [Calendar icon]
 - *Currency Code: USD
 - *Unit of Measure: [Empty]
 - Amount Only: No
 - Request New Item: No
- Supplier Information:**
 - Supplier ID: [Empty]
 - Supplier Location: [Empty]
 - Supplier Item ID: [Empty]
- Manufacturer Information:**
 - Manufacturer ID: [Empty]
 - Manufacturer's Item ID: [Empty]
- Comment:**
 - Comment Text: [Empty]
 - Send Comment to Supplier:
 - Show Comment on Receipt:
 - Show Comment on Voucher:

The 'Checkout' button is highlighted with a red box at the top right.

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.

Review the Requisition

Create Requisition Continue Shopping Save Submit

Checkout Order Total 100.00 USD

Requisition Summary

Business Unit 09000 Mgmt and Enterprise Services Priority Medium

Requisition Name **SW_RELEASE_MANUAL**

Requester BBEN06 Bosten Benn

Currency USD

Header Comments

Additional Fields

Justification Comments

Requisition Lines Overview

Select All Actions 1 row

Line	Item ID	Supplier	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	
Line 1	Special Request Training	SLALOM INC	<input type="radio"/> No	1.0000	EA	100.00	USD	100.00 USD	<input type="button" value="ScheduleDetails"/> >

Line Comments

Order Total 100.00 USD

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.

Enter a **Requisition Name**:

- **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.
- 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.

Click the **Schedule Details** button in the Requisition Lines Overview section to define the Schedule details. Alternatively, the user may click on the arrow to the right of the schedule details button to open the page.



Define Schedule/Distribution Details

Item Summary

Training

Item ID: Technology activity or resourc
 Item Category: Technology activity or resourc
 Supplier ID: 000085663 SLALOM INC
 Supplier Location: 0001
 Supplier Item ID:
 Price: 100.00 USD
 Quantity: 1.0000 EACH
 Total Price: 100.00 USD

Buyer: BOWMAN Irene Bowman (500)
 Manufacturer:
 Manufacturer's Item ID:
 UFN Type:
 UFN ID:

Schedule 1

Schedule 1
 *Ship To: 09020030
 Attention To: Boston Benn
 Due Date:
 Address: OMES-CENTRAL PURCHASING
 DIVISION 2401 N LINCOLN
 BLVD, SUITE 115 OKLAHOMA
 CITY, OK 73105
 Quantity: 1.0000
 Price: 100.00 USD
 Total: 100.00 USD

Distributions

Please enter GL Business Unit before selecting chartfield values
 *Distribute By: Quantity

Chartfields1	Chartfields2	Chartfields3	Details	Budget Information	Asset Information	Show All
Distribution Line	Status	Location	Quantity	Open Qty	Percent	Merchandise Amount
1	Open	09020030	1.0000	1.0000	100.0000	100.00

Define the Schedule Details and Distribution information at the bottom of the page.

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.

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

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.

The **Chartfield** tabs can be toggled between to view more distribution information, or you can click the **Show All** tab to view all distribution information.



Chartfields Tabs – Budget/Funding Information

Chartfields 1 Tab

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

Quantity/Percent: Enter the Quantity/Percent you wish to distribute on the line.

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.

Chartfields 2 Tab

Enter the funding information for the requisition on this page.

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.

Chartfields 3 Tab

Enter additional funding information in this tab as necessary for agency requirements.

Use the **Chartfield tabs** to define a valid funding string for the Requisition.

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

Create Requisition Continue Shopping Save Submit

Checkout Order Total 100.00 USD

Requisition Summary

Business Unit 09000 Mgmt and Enterprise Services Priority Medium

Requisition Name SW_RELEASE_MANUAL

Requester BBENN06 Bosten Benn

Currency USD

Header Comments

Additional Fields

Justification Comments

Requisition Lines Overview

Select All Actions 1 row

Line	Item	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request Training Item ID Supplier SLALOM INC	1.0000	EA	100.00	USD	100.00 USD	<input type="checkbox"/> ScheduleDetails

Line Comments

Order Total 100.00 USD

Line 1

Item Summary

Training

Item ID
Item Category Technology activity or resource
Original Substituted Item
Long Description Training

Price 100.00 USD
Quantity 1.0000 EACH
Total Price 100.00 USD

Physical Nature Goods

Buyer BBENN06

Attributes

Special Request

Flags

Solicitation/Change Order/Ratification

Sole Source Flag No

Statutory Exemption Flag No

Contract Release Flag No

Sole Source Type

Statutory Exemption Type

Statutory Exemption Desc

Statutory Exemption Comments

Item Additional Information

Contract Information

Use Contract if Available Yes

Contract ID

Contract Version

Contract Line

Category Line

[Contract Details](#)

Supplier Information

Manufacturer Information

Sourcing Controls

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. Alternatively, the user may click the Schedule Details button to the left of the arrow to open the page.
2. Click the Line Details tab, found at the top of the **Schedule Details** page.



Define Line Details

Line 1

Schedule Details | **Line Details**

Item Summary

Training

Item ID	Physical Nature	Goods
Item Category	Technology activity or resourc	
Original Substituted Item	Buyer	BBENND06
Long Description	Training	Buyer Information
Price	100.00 USD	Show Configurator
Quantity	1.0000 EACH	
Total Price	100.00 USD	

Attributes

Special Request

Flags

Solicitation/Change Order/Ratification	<input type="text"/>	Sole Source Type	<input type="text"/>
Sole Source Flag	<input type="radio"/> No	Statutory Exemption Type	<input type="text"/>
Statutory Exemption Flag	<input type="radio"/> No	Statutory Exemption Desc	<input type="text"/>
Contract Release Flag	<input type="radio"/> No	Statutory Exemption Comments	<input type="text"/>

[Expand All](#) [Collapse All](#)

Item Additional Information

Contract Information

Use Contract if Available	<input checked="" type="radio"/> Yes	Contract Line	<input type="text"/>
Contract ID	<input type="text"/>	Category Line	<input type="text"/>
Contract Version	<input type="text"/>	Contract Details	

[Supplier Information](#)

[Manufacturer Information](#)

[Sourcing Controls](#)

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.



Submit the Requisition

Create Requisition Continue Shopping Save Submit

Checkout Order Total 100.00 USD

Requisition Summary

Business Unit 09000 Mgmt and Enterprise Services
 Requisition Name SW_RELEASE_MANUAL
 Requester BBENN06 Bosten Benn
 Currency USD
 Priority Medium

Additional Fields

Justification Comments

Requisition Lines Overview

Select All Actions 1 row

Line	Description	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request Technology Upgrade/Migration Transformation	No	1.0000	EA	100.00	USD	100.00 USD	ScheduleDetails >

Order Total 100.00 USD

After reviewing the Requisition details, click the **Submit** button in the top right of the page.

Requisition Details Print Preview

Business Unit 09000
 Requisition ID 0900019676
 Requisition Name SW_RELEASE_MANUAL
 Last Modified Date 11/18/2024 12:07:37PM
 Status Pending Approval

Total Lines 1
 Total Amount 100.00 USD
 Budget Checked Status **Not Checked**

Check Budget Pre-Check Budget

View Approval Chain

Next Steps

- Edit this Requisition
Modify this requisition
- My Requisitions
Go to existing requisitions
- Create Requisition
Create another requisition

Click the **Check Budget** button to initiate the Budget Checking process for the Requisition.

The **View Approval Chain** button can be used to view the users in the approval workflow.

Once the Requisition has been approved, it is ready to be sourced to the Purchase Order.

Requisition Summary

Requisition Name SW_RELEASE_MANUAL
 Business Unit 09000
 Requisition ID 0900019676
 Requisition Date 11/18/2024
 Request State **Approved**

Requester Bosten Benn
 Entered By Bosten Benn
 Budget Check Status Valid
 Total Amount 100.00 USD

Requisition Lifeline

Requisition → Approvals → Inventory → Purchase Order → Change Request → Receiving → Delivery → Returns → Invoice → Payment

Option 1: Expedite Requisition to Purchase Order

Once your requisition has completed routing through the approval path and has been fully approved, the requisition is ready to expedite to a Purchase Order.

Expedite Requisitions Page

Navigate to the Expedite Requisitions Page using the Compass icon at the top right of the page.

Navigation: *Menu > eProcurement > Buyer Center > Expedite Requisitions*

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit <input type="text" value="09000"/>	Category <input type="text"/>
Requisition ID <input type="text" value="0900019677"/>	Supplier Name <input type="text"/>
Requisition Name <input type="text"/>	<input checked="" type="checkbox"/> Include Lines With No Supplier
Requester <input type="text"/>	
Buyer <input type="text"/>	

Enter the Business Unit and Requisition ID you wish to expedite to a Purchase Order.

Click the **Search** button.



Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit Category

Requisition ID Supplier Name

Requisition Name Include Lines With No Supplier

Requester

Buyer

Requisition Schedule Lines

Include	Requisition ID	Line	Sched	Item Description	Select	Supplier Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
<input checked="" type="checkbox"/>	0900019677	1	1	Technology Upgr	<input type="checkbox"/>	SLALOM INC-001	0001	1.0000	EA	100.00	USD	N

Include All/Exclude All Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID Build POs as Approved

[Go to Process Monitor](#)

Once the requisition is located, enter the **Buyer** and select the **Include All/Exclude All** checkbox to select all line items (if more than one).

Alternatively, if the user wants to select only one line item, they can use the **Include** checkbox on the appropriate line.

Click the **Submit** button.



Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit

Category

Requisition ID

Supplier Name

Requisition Name

Include Lines With No Supplier

Requester

Buyer

Select All/Deselect All

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID

Build POs as Approved

[Go to Process Monitor](#)

Click the [Go to Process Monitor](#) hyperlink located under the Build Purchase Order section at the bottom of the page.



Process List
Server List

View Process Request For

User ID

Type Days

Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh [Report Manager](#)

Refresh

Clear

Reset

▼ **Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	29703771		Application Engine	PV_PO_CREATE	BBENN06	12/02/2024 2:35:43PM CST	Success	Posted	Details	▼ Actions

Click the **Refresh** button until the **Run Status** displays as “Success.”

Make note of the **Instance Number**.



Sourcing Workbench

To find the Purchase Order, navigate to the Sourcing Workbench.

Navigation: Menu > Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench

Sourcing Workbench

Sourcing

▼ Search Criteria

Process Instance <input type="text"/>	System Source <input type="text"/>
Business Unit <input type="text" value="09000"/>	PO Stage Type <input type="text"/>
Requisition ID <input type="text" value="0900019677"/>	PO Stage ID <input type="text"/>
Requisition Name <input type="text"/>	Stage Status <input type="text"/>
Buyer <input type="text"/>	Item ID <input type="text"/>
Contract SetID <input type="text"/>	Line Number <input type="text"/>
Contract ID <input type="text"/>	Schedule Number <input type="text"/>

Select All
 UnSelect All

Enter the Business Unit and Requisition ID

or

Enter the Process Instance Number from the previous page.

Click the Search button.



Sourcing Workbench
Sourcing

▼ Search Criteria

Process Instance	<input type="text"/>	System Source	<input type="text"/>
Business Unit	09000	PO Stage Type	<input type="text"/>
Requisition ID	0900019677	PO Stage ID	<input type="text"/>
Requisition Name	<input type="text"/>	Stage Status	<input type="text"/>
Buyer	<input type="text"/>	Item ID	<input type="text"/>
Contract SetID	<input type="text"/>	Line Number	<input type="text"/>
Contract ID	<input type="text"/>	Schedule Number	<input type="text"/>

Search

Search Results

1-1 of 1 | View All

Selected Items | Stage Info | Error Messages

Sel	Instance	*Stg Status	Unit	Buyer	Supplier ID	Loc	Item ID	Description	Requisition ID	Purchase Order
<input type="checkbox"/>	29703771	Completed	09000	Bosten Benn	0000585563	0001	Item	Technology Upgrade/Migration T	0900019677	0909023465

Select All
 UnSelect All

In the Search Results section, the **Requisition ID** displays along with the **Purchase Order** number.

Make note of the Purchase Order number to edit the PO before dispatching.

Click the **Purchase Order** number hyperlink to view the Purchase Order in a new window.

Option 2: Sourcing the Requisition into a Purchase Order

Requisition Selection

NOTE: This process will select **all** Staged Requisitions in the system to source them into Purchase Orders. If the user wants to expedite a single Requisition into a Purchase Order, Option 1 on page 26 should be used.

Purchasing > Purchase Orders > Stage/Source Requests > Requisition Selection

Requisition Selection
Sourcing

Search Criteria

Business Unit: 09000
Supplier ID:
Category:
Requisition ID: 0900019676
Requisition Name:
Contract ID:

Buyer:
Origin:
Max Rows: 20

Include Reqs With No Supplier
 Include Inventory Items
 Stockless Item
 Exclude Auto Source Item

Selection Options

Define PO
 Check Item Available

*PO Item Supplier Option: No Edit Required

Select Requisition Lines

Include	Supp ID	*Supplier	Supplier Location	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price
<input type="checkbox"/>	0000585563	SLALOM INC-001	0001	1.0000	EA		Technology Upgrade/Migration T	0900019676	1	Procurement Card	N

Select All Clear All

Staging Information

Enter the **Requisition ID** and click the **Search** button to retrieve the Requisition.

Select Requisition Lines

Include	Supp ID	*Supplier	Supplier Location	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price
<input checked="" type="checkbox"/>	0000585563	SLALOM INC-001	0001	1.0000	EA		Technology Upgrade/Migration T	0900019676	1	Procurement Card	N

Select All Clear All

Staging Information

Click the **Include** radio box, outlined above, to select the Requisition for sourcing.

Click the **Save** button.



Requisition Selection
Sourcing

Search Criteria

Business Unit: 09000

Supplier ID:

Category:

Requisition ID: 0900019676

Requisition Name:

Contract ID:

Buyer:

Origin:

Max Rows: 20

Include Reqs With No Supplier

Include Inventory Items

Stockless Item

Exclude Auto Source Item

Selection Options

Define PO

Check Item Available

All Lines From Req

*PO Item Supplier Option: No Edit Required

Select Requisition Lines

Include	Select		Supp ID	*Supplier	Supplier Location	PO Qty	PO UOM	Item	Item Availability
<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="RFQ"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Item Availability

Select All Clear All

Staging Information

After clicking the **Save** button, click the **Create PO's** button.

Objectives Options Results

Run Control ID ONLSRC Report Manager Process Monitor Run

Select Individual Processes
Create Purchase Orders From
 Select all of the sources from where you would like the purchase orders created. Select the Options tab to specify Selection criteria and PO creation options that correspond with the selected sources.

Approved Requisitions
 Staged Requisitions
 Request For Quotes
 Contracts
 Transactions in Sourcing Workbench in a 'Ready' status
 All Other Sources

Planned Orders / Prod. Mgmt

Buyer
 A Buyer is required. It is used on the purchase order only if another one is not found on the staging tables or default hierarchy, or if the transactions are consolidated by buyer.

*Buyer Bosten Benn

Check Inventory
 Select if you would like the system to first check Inventory before creating a purchase order. This option is available for Requisitions, Planned Orders, Production Management, and the option All Other Sources.

Check Inventory First

Apply Change Requests From
 Planning
 All Other Sources

Source From Inventory
 Source From Inventory

Save Return to Search Notify Previous tab Next tab Add Update/Display

Select the “**Staged Requisitions**” checkbox to select all Requisitions that have been staged on the previous page.

Buyer – Select a buyer to be defined on the purchase order. The system uses this buyer when one is not found through staging tables.

Click the **Options** tab to define selection options.



Objectives **Options** Results

Run Control ID ONLSRC Report Manager Process Monitor

[Expand All](#) [Collapse All](#)

▼ **Staged Requisitions, WOs, RFQ, and 'All Other Sources' Selection Criteria**

Process Instance

Business Unit To Business Unit

System Source

Buyer

Item SetID

Item ID

Category

Sourcing Method

Basic
 Flexible
 Split
 Cumulative

Accumulate Level

▼ **Purchase Order Options**

*Consolidation Method

Origin

Purchase Order Date

Purchase Order Reference

Pre-Approve Supplier
 Build POs as Approved
 Calculate PO Line Numbers
 Hold From Further Processing
 Allow Dispatch When Appr

Flexible Sourcing Controls

Lead Time Factor %

Ship to Priority Factor %

Price Factor %

Supplier Priority Factor %

▼ **Additional Processing Options**

Run Budget Check
 Run Document Tolerance

Click the **Expand All** hyperlink to specify selection criteria and purchase order creation options that correspond with the selected sources, if necessary.

Click the **Run** button to initiate the PO Creation process.



Process Scheduler Request
x Help

User ID **BBENN06**
Run Control ID **ONLSRC**

Server Name

Recurrence

Time Zone

Run Date

Run Time

[Reset to Current Date/Time](#)

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Automatic Purchasing Sourcing	PO_AUTO_SRC	Application Engine	Web	TXT	Distribution

[OK](#)
[Cancel](#)

Select the **Automatic Purchasing Sourcing** process, then click the **OK** button.

Click the **Process Monitor** hyperlink to view the status.

Process List
Server List

View Process Request For

User ID Type Last 10 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

Process List

1-19 of 19 | View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	29699273		Application Engine	PO_AUTO_SRC	BBENN06	11/18/2024 1:31:30PM CST	Success	Posted	Details	▼ Actions

Use the **Refresh** button to update the page until it displays a Run Status of Success.

Sourcing Workbench

Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench

Sourcing Workbench
Sourcing

▼ **Search Criteria**

Process Instance <input type="text"/>	System Source <input type="text"/>
Business Unit <input type="text" value="09000"/>	PO Stage Type <input type="text"/>
Requisition ID <input type="text" value="0900019676"/>	PO Stage ID <input type="text"/>
Requisition Name <input type="text"/>	Stage Status <input type="text"/>
Buyer <input type="text"/>	Item ID <input type="text"/>
Contract SetID <input type="text"/>	Line Number <input type="text"/>
Contract ID <input type="text"/>	Schedule Number <input type="text"/>

Select All
 UnSelect All

Input the **Business Unit** and **Requisition ID** and click the **Search** button.

Search Results

1-1 of 1 | View All

Selected Items | Stage Info | Error Messages | II>

Sel	Instance	*Stg Status	Unit	Buyer	Supplier ID	Loc	Item ID	Description	Requisition ID	Purchase Order
<input type="checkbox"/>	29699273	Completed	09000	Irene Bowman (580)	0000685563	0001	Item	Technology Upgrade/Migration T	0900019676	0909023463

Select All
 UnSelect All

When the process is completed, you can review and complete the PO by **clicking the Purchase Order** hyperlink.



Purchase Order

Maintain Purchase Order

Purchase Order

Business Unit: 09000 PO Status: Approved
 PO ID: 0909023463 Budget Status: Not Chk'd
 Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 11/18/2024 Supplier Search
 *Supplier: SLALOM INC-001 Supplier Details
 *Supplier ID: 000585563 SLALOM INC
 *Buyer: IBOWMAN Irene Bowman (580)
 PO Reference: Online Src From Req 0900019676

Doc Tol Status: Not Chk'd
 Receipt Status: Not Recvd
 Priority: Medium
 *Dispatch Method: Print [Dispatch]

Amount Summary

Merchandise: 100.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 100.00 USD
 Encumbrance Balance

Add Items From: Catalog Item Search
 Select Lines To Display: Search for Lines Line [] To [] [Retrieve]

Lines

Details | **Contract** | Receiving | []

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Technology	1.0000	EA	60101725	100.00000	100.00	Approved

View Printable Version View Approvals [Close Short All Lines] *Go to [More ...]

[Save] [Return to Search] [Notify] [Refresh] [Add] [Update/Display]

Click the **Contract Tab**, outlined above.

Lines

Details | **Contract** | Receiving | []

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release
1		Technology	00000	000000000000000000000000007507	1	4		2

View Printable Version View Approvals [Close Short All Lines] *Go to [More ...]

[Save] [Return to Search] [Notify] [Refresh]

From the **Contract Tab**, you can see that the contract attached to the Purchase Order during the sourcing process.

The **Release** number is also shown on this page indicating the process was successfully completed.

The user will need to Pre-Approve, Budget Check, Approve, and Dispatch the Purchase Order in order to use it.