

# State of Oklahoma COR452

eProcurement Requisition Manual  
Security Provisioning  
Office of Management & Enterprise Services



**OKLAHOMA**

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## Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	03/19/2012	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



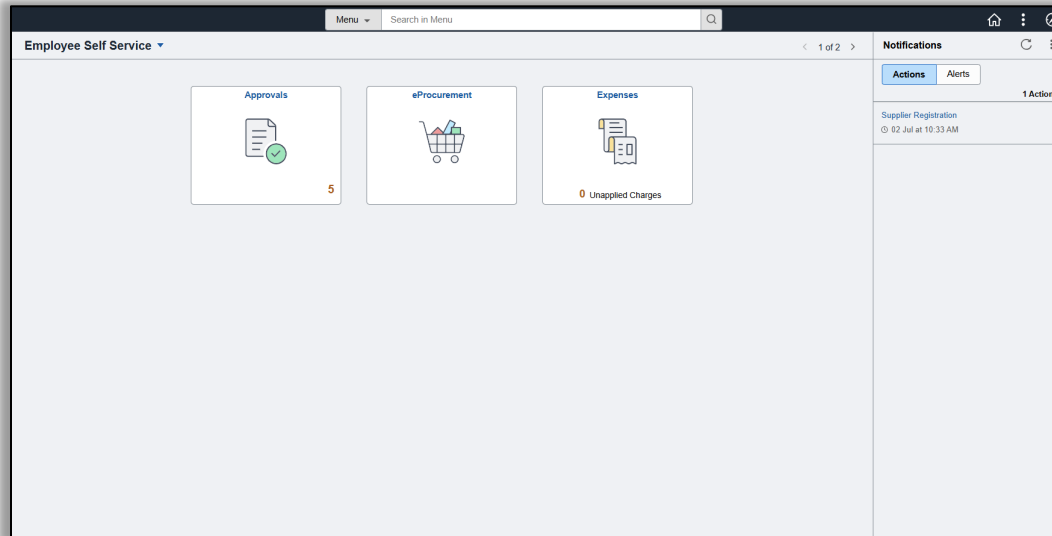
## Learner Outcomes

- 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.

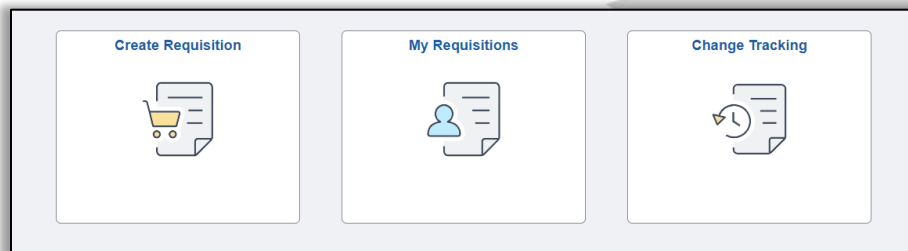


## Part 1 - Creating the ePro Requisition

### Step 1 – Define Requisition

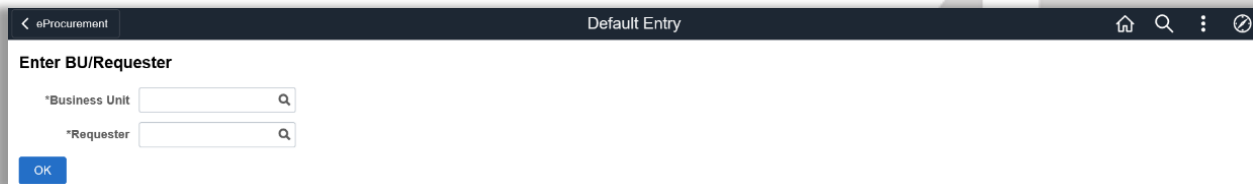


From the Home Page, select the **eProcurement** tile.

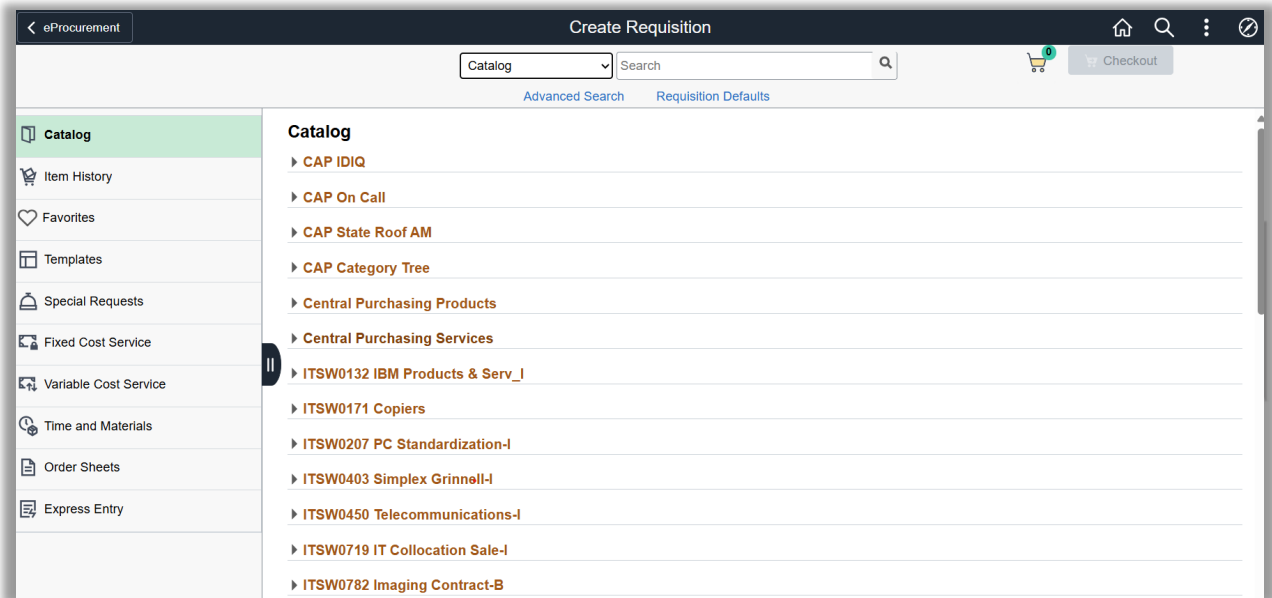


The eProcurement Menu opens.

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.

Cancel
**Requisition Defaults**
Done

**▼ Header Defaults**

Business Unit	<input type="text" value="09000"/>	Q	Requisition Name	<input type="text"/>
Requester	<input type="text" value="BBENN06"/>	Q	Bosten Benn	
Priority	Medium ▼			
Currency	<input type="text" value="USD"/>	Q		

**▼ Line Defaults**

Supplier ID	<input type="text"/>	Q	Category	<input type="text"/>	Q
Supplier Location	<input type="text"/>	Q	Unit of Measure	<input type="text"/>	Q
Buyer	<input type="text"/>				

**▼ Shipping Defaults**

Ship To	<input type="text" value="09020030"/>	Q	Attention	<input type="text"/>
	<input type="button" value="Add One Time Address"/>			
Due Date	<input type="text"/>			

**▼ Distribution Defaults**

1 row

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	Show All
Distribution Line	Percent	Location	GL Unit	Account	
1	0.0000	<input type="text" value="09020030"/>	<input type="text" value="09000"/>	<input type="text"/>	-

**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.

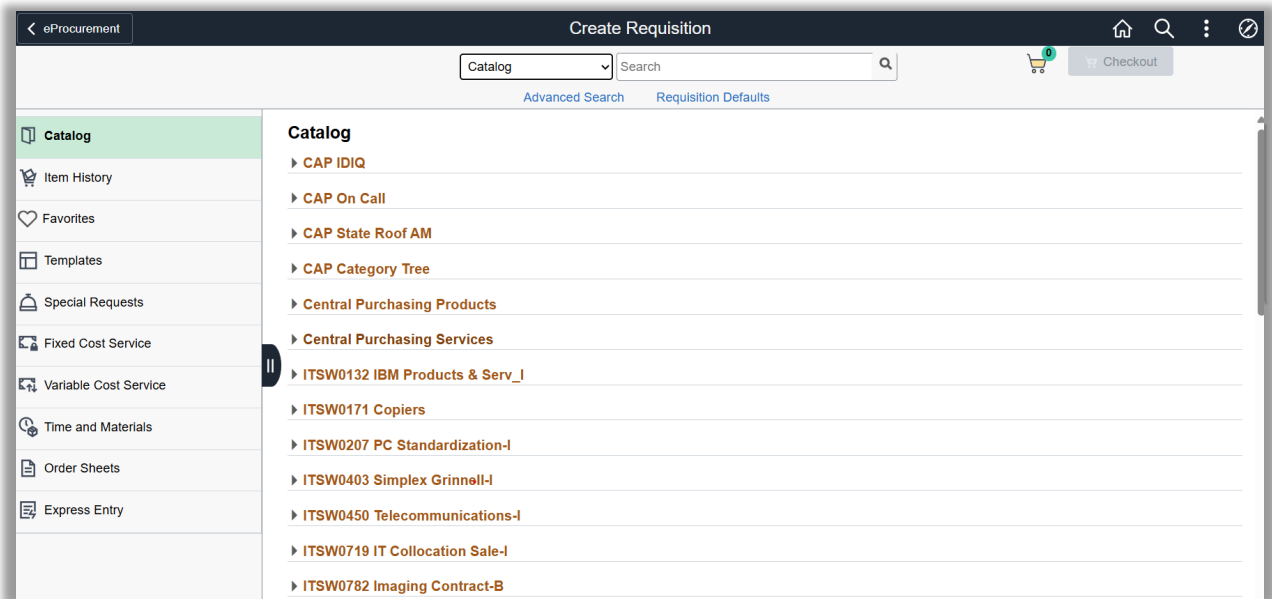
**Attention:** Enter the person from whom you want to receive notification about this shipment. The system includes this field value on outbound purchase orders to the Marketplace.

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

Click the **Done** 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

**Special Requests**

**Item Information**

\*Item Description

\*Price

\*Quantity

\*Category

Due Date

\*Currency Code

\*Unit of Measure

Amount Only  No

Request New Item  No

**Supplier Information**

Supplier ID

Supplier Location

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

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](http://unspsc.org) or use the looking glass to search.

Click the **looking glass icon**.



## Look Up Category Search Categories

**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** 1 row

	Catalog ◇	Category ◇	Description ◇
1	<a href="#">CP_PRODUCT_TREE</a>	<a href="#">44121600</a>	<a href="#">Desk supplies</a>

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.

### 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 ▼

Category 44121600

Find

**Categories** 1 row

	Catalog	Category	Description
1	CP_PRODUCT_TREE	44121600	Desk supplies

▶ **Browse Category Tree**

Click the **Browse Category Tree** line.

▼ **Browse Category Tree**

\*Select a catalog CAP IDIQ ▼

Left | Right  
CAP\_IDIQ

CAP Category Tree

CAP IDIQ

CAP On Call

CAP State Roof AM

Central Purchasing Products

Central Purchasing Services

IT Telecommunication

ITSW0132 IBM Products & Serv\_I

ITSW0171 Copiers

ITSW0206 WSCA Computer, LAN

ITSW0207 PC Standardization-I

ITSW0403 Simplex Grinnell-I

ITSW0450 Telecommunications-I

ITSW0718 Desktop Laser Mtnce-I

ITSW0719 IT Collocation Sale-I

ITSW0782 Imaging Contract-B

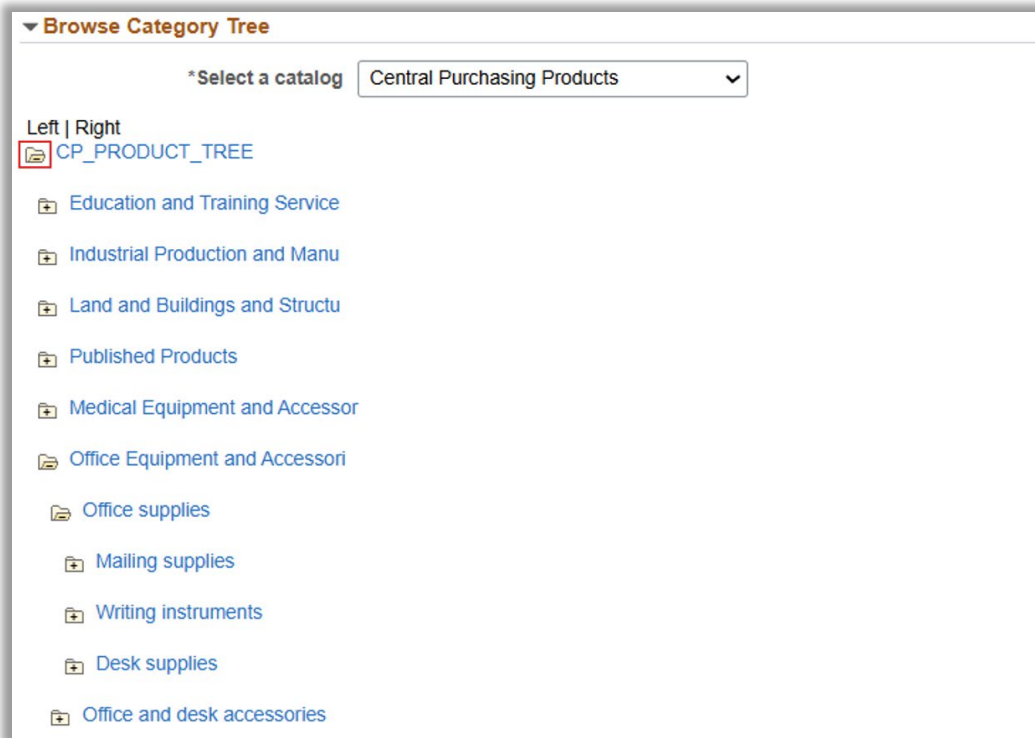
ITSW0794 Electronic Media De-I

ITSW0804A Online Legl-WGroup-I

ITSW0804B Online Legal-Lexis-I

ITSW0855 Grants Management-I

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).

**Special Requests**

**Item Information**

\*Item Description

\*Price       \*Currency Code

\*Quantity       \*Unit of Measure

\*Category

Due Date

Amount Only  No

Request New Item  No

---

**Supplier Information**

Supplier ID

Supplier Location

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

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

Click the looking glass icon to search.

**Supplier Lookup**

Supplier SetID 00000

Supplier ID

Supplier Name

Short Supplier Name

Alternate Supplier Name

Country

City

State

Postal Code

Search Results

**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

Short Supplier Name

Alternate Supplier Name

Country

City

State

Postal Code

▼ Search Results

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

\*Price       \*Currency Code

\*Quantity       \*Unit of Measure

\*Category

Due Date

Amount Only  No      Request New Item  No

---

**Supplier Information**

Supplier ID  STAPLES INC      Supplier Location

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

Notice the Supplier Information has been updated.



## Step 3 - Add to Cart and Checkout

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

- Item Information:**
  - \*Item Description: OFFICE SUPPLIES: General desk/office supplies
  - \*Price: 50
  - \*Quantity: 1
  - \*Category: 44121600
  - Due Date: [Calendar icon]
  - \*Currency Code: USD
  - \*Unit of Measure: EA
  - Amount Only:  No
  - Request New Item:  No
- Supplier Information:**
  - Supplier ID: 0000067919 (STAPLES INC)
  - Supplier Location: 0030
  - 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

An 'Add to cart' button is located at the bottom left of the form.

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.

This screenshot is identical to the previous one, but the 'Add to cart' button at the bottom left is highlighted with a red box. Additionally, the 'Checkout' button in the top right corner is also highlighted with a red box.

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.



## Step 4 - Review and Submit

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

**Create Requisition** Continue Shopping Save Submit

**Checkout** Order Total 50.00 USD

**Requisition Summary**

Business Unit 09000 Mgmt and Enterprise Services Priority Medium

Requisition Name

Requester BBENN06 Bosten Benn

Currency USD

Header Comments

**Additional Fields**

**Justification Comments**

**Requisition Lines Overview**

Select All Actions

Line	Item ID	Supplier	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	
Line 1	Special Request	STAPLES INC	No	1,000	EA	50.00	USD	50.00 USD	<input type="button" value="ScheduleDetails"/> <input type="button" value="&gt;"/>

Line Comments

Order Total 50.00 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.

## 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

**Create Requisition** Continue Shopping Save Submit

**Checkout** Order Total 50.00 USD

**Requisition Summary**

Business Unit 09000 Mgmt and Enterprise Services Priority Medium

Requisition Name Office Supplies: General\_TST

Requester BBENN06 Bosten Benn

Currency USD

Header Comments

**Additional Fields**

**Justification Comments**

**Requisition Lines Overview**

Select All Actions 1 row

<input type="checkbox"/>		<b>Line 1</b> Special Request OFFICE SUPPLIES: General desk/office supplies	<input type="radio"/> Amount Only No	Quantity 1.0000	Unit of Measure EA <input type="text" value="Q"/>	Price 50.00	Currency USD	Total 50.00 USD	<span>ScheduleDetails</span> <span>&gt;</span>
--------------------------	--	--	---	--------------------	--	----------------	-----------------	--------------------	--

Line Comments  Delete Order Total 50.00 USD

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

Select the **Schedule Details** 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.

The screenshot displays the 'Schedule Details' page for an item. The 'Item Summary' section shows 'OFFICE SUPPLIES: General desk/office supplies' with details like Item ID, Supplier ID (000007919 STAPLES INC), and Price (50.00 USD). The 'Attributes' section includes a 'Special Request' field. The 'Schedule 1' section has input fields for 'Ship To' (09000), 'Attention To', and 'Due Date'. Below these are buttons for 'Ship To Comments', 'Price Adjustments', and 'Custom Fields'. The 'Distributions' section shows a table with columns for Distribution Line, Status, Dist Type, Location, Quantity, Open Qty, Percent, Merchandise Amount, and GL Business Unit. A single distribution row is visible with a quantity of 1.0000. Red circles '1' and '2' highlight the plus buttons on the Schedule and Distribution lines, respectively.

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

▼ 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	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		09000	1.0000	1.0000	100.0000	50.00	09000

**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.

▼ Distributions  
Please enter GL Business Unit before selecting chartfield values

\*Distribute By: Quantity

Chartfields1 | Chartfields2 | Chartfields3 | Details | Budget Information | Asset Information | Show All

Account	Operating Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref
536130						

**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.

▼ Distributions  
Please enter GL Business Unit before selecting chartfield values

\*Distribute By: Quantity

Chartfields1 | Chartfields2 | Chartfields3 | Details | Budget Information | Asset Information | Show All

Sub-Account	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	CFDA#

**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

**Create Requisition** Continue Shopping Save **Submit**

**Checkout** Order Total 50.00 USD

**Requisition Summary**

Business Unit: 09000 Mgmt and Enterprise Services Priority: Medium

Requisition Name: Office Supplies: General\_TST

Requester: BBENN06 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	Actions
Line 1	Special Request OFFICE SUPPLIES: General desk/office supplies	STAPLES INC	<input type="radio"/> No	1.0000	EA	50.00	USD	50.00 USD	<input type="checkbox"/> ScheduleDetails <b>&gt;</b>

Order Total 50.00 USD

**Schedule Details** **Line Details**

**Item Summary**

OFFICE SUPPLIES: General desk/office supplies

Item ID:   
Item Category: Desk supplies Physical Nature: Goods

Original Substituted Item:   
Long Description: OFFICE SUPPLIES: General desk/office supplies Buyer: AANDREWS

Price: 50.00 USD   
Quantity: 1.0000 EACH   
Total Price: 50.00 USD Buyer Information

Show Configurator

**Attributes**

Special Request

**Flags**

Solicitation/Change Order/Ratification:

Sole Source Flag:  No Sole Source Type:

Statutory Exemption Flag:  No Statutory Exemption Type:

Contract Release Flag:  No Statutory Exemption Desc:

Statutory Exemption Comments:

**Item Additional Information**

**Contract Information**

Use Contract if Available:  Yes Contract Line:

Contract ID:    Category Line:

Contract Version:  [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.
2. Click the Line Details tab, found at the top of the **Schedule Details** page .



Schedule Details	Line Details																					
<p>▼ <b>Item Summary</b></p> <p><b>OFFICE SUPPLIES: General desk/office supplies</b></p> <table border="0"> <tr> <td>Item ID</td> <td>Physical Nature</td> <td>Goods</td> </tr> <tr> <td>Item Category</td> <td>Desk supplies</td> <td></td> </tr> <tr> <td>Original Substituted Item</td> <td>Buyer</td> <td>AANDREWS</td> </tr> <tr> <td>Long Description</td> <td>OFFICE SUPPLIES: General desk/office supplies</td> <td> <input type="button" value="Buyer Information"/>   <input type="button" value="Show Configurator"/> </td> </tr> <tr> <td>Price</td> <td>50.00 USD</td> <td></td> </tr> <tr> <td>Quantity</td> <td>1,000 EACH</td> <td></td> </tr> <tr> <td>Total Price</td> <td>50.00 USD</td> <td></td> </tr> </table>		Item ID	Physical Nature	Goods	Item Category	Desk supplies		Original Substituted Item	Buyer	AANDREWS	Long Description	OFFICE SUPPLIES: General desk/office supplies	<input type="button" value="Buyer Information"/> <input type="button" value="Show Configurator"/>	Price	50.00 USD		Quantity	1,000 EACH		Total Price	50.00 USD	
Item ID	Physical Nature	Goods																				
Item Category	Desk supplies																					
Original Substituted Item	Buyer	AANDREWS																				
Long Description	OFFICE SUPPLIES: General desk/office supplies	<input type="button" value="Buyer Information"/> <input type="button" value="Show Configurator"/>																				
Price	50.00 USD																					
Quantity	1,000 EACH																					
Total Price	50.00 USD																					
<p>Attributes</p> <p>Special Request</p>																						
<p>▼ <b>Flags</b></p> <table border="0"> <tr> <td>Solicitation/Change Order/Ratification</td> <td><input type="text"/></td> <td>Sole Source Type</td> <td><input type="text"/></td> </tr> <tr> <td>Sole Source Flag</td> <td><input type="radio"/> No</td> <td>Statutory Exemption Type</td> <td><input type="text"/></td> </tr> <tr> <td>Statutory Exemption Flag</td> <td><input type="radio"/> No</td> <td>Statutory Exemption Desc</td> <td><input type="text"/></td> </tr> <tr> <td>Contract Release Flag</td> <td><input type="radio"/> No</td> <td>Statutory Exemption Comments</td> <td><input type="text"/></td> </tr> </table> <p> <input type="button" value="Expand All"/> <input type="button" value="Collapse All"/> </p>		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"/>					
Solicitation/Change Order/Ratification	<input type="text"/>	Sole Source Type	<input type="text"/>																			
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Contract Release Flag	<input type="radio"/> No	Statutory Exemption Comments	<input type="text"/>																			
<p>► <b>Item Additional Information</b></p> <p>▼ <b>Contract Information</b></p> <table border="0"> <tr> <td>Use Contract if Available</td> <td><input checked="" type="radio"/> Yes</td> <td>Contract Line</td> <td><input type="text"/></td> </tr> <tr> <td>Contract ID</td> <td><input type="text"/></td> <td>Category Line</td> <td><input type="text"/></td> </tr> <tr> <td>Contract Version</td> <td><input type="text"/></td> <td><a href="#">Contract Details</a></td> <td></td> </tr> </table>		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"/>	<a href="#">Contract Details</a>										
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"/>	<a href="#">Contract Details</a>																				
<p>► <b>Supplier Information</b></p> <p>► <b>Manufacturer Information</b></p> <p>► <b>Sourcing Controls</b></p>																						

## 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

**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**

Device Tracking  No

Stockless Item  No

RFQ Required  No

Inspection Required  No

Amount Only  No

Zero Price Indicator  No

**Contract Information**

Use Contract if Available  Yes

Contract ID

Contract Version

Contract Line

Category Line

[Contract Details](#)

**Supplier Information**

Supplier ID

Supplier Location

Supplier Item ID

Supplier Name  STAPLES INC

Supplier's Catalog Number

Item Supplier Priority

**Manufacturer Information**

Manufacturer ID

Manufacturer's Item ID

UPN Type

UPN ID

Manufacturer

**Sourcing Controls**

Consolidate with other Reqs  No

Calculate Price  No

Override Suggested Supplier  Yes

Inventory Source Flag  No

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.

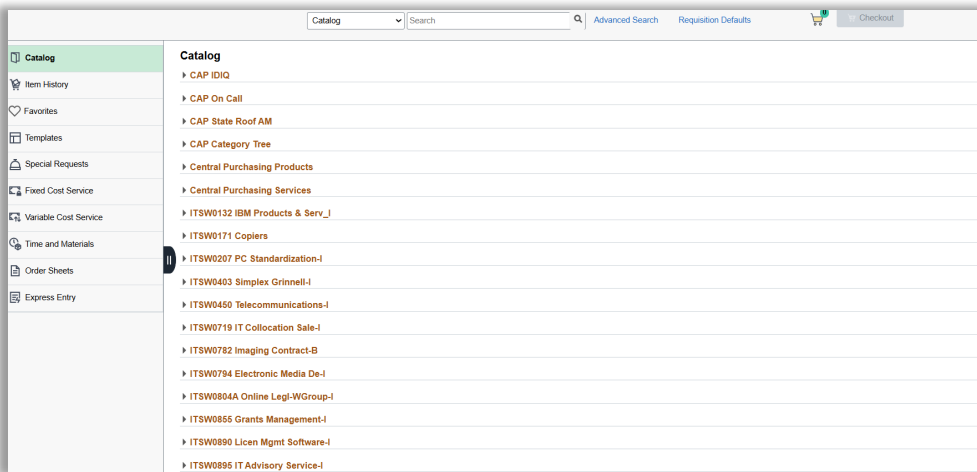
## Checkout Confirmation

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.

The screenshot shows the 'Advanced Search' form. At the top, there is a 'Search Name' field with a search icon and a 'Search Tips' link. Below this is a 'Save Search Criteria' link. The main section is titled 'Advanced Item Search' and includes a dropdown menu for '\*Search Contains' set to 'All' and a note 'of the following search fields entered.' Below this are several search criteria, each with a dropdown menu and an input field: Description (Contains Any), Manufacturer (Contains Any), Manufacturer ID (Contains Any), Supplier (Contains Any), Supplier ID (Contains Any), Item ID (Contains Any, with the value '1000013634' entered), Model (Contains Any), UPN ID (Equals), Category ID (Contains Any), Supplier Item ID (Contains Any), Manufacturer Item ID (Contains Any), and Category (Contains Any). At the top right of the form are 'Clear' and 'Search' buttons.

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

Click **Search** button.

## Step 3 - Add to Cart and Checkout

Search Results

ePro Home

Items 1 through 5 of 5

Items

Sort By Description

1000013634 OFFICE SUPPLIES: General desk/office supplies Supplier FRANK G LOVE ENVELOPES INC	\$0.0100 YEAR	Supplier ID 0000077430 Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID UPN Type UPN ID Lead Time Days 21
1000013634 OFFICE SUPPLIES: General desk/office supplies Supplier SUPPLYONE OKLAHOMA CITY INC	\$0.0100 YEAR	Supplier ID 0000073822 Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID UPN Type UPN ID Lead Time Days
1000013634 OFFICE SUPPLIES: General desk/office supplies Supplier STAPLES INC	\$1,000.00 YEAR	Supplier ID 0000087919 Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID UPN Type UPN ID Lead Time Days
1000013634 OFFICE SUPPLIES: General desk/office supplies Supplier MCLAIN-CHITWOOD OFFICE PRODUCTS INC	\$0.0100 YEAR	Supplier ID 0000073822 Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID UPN Type UPN ID Lead Time Days
1000013634 OFFICE SUPPLIES: General desk/office supplies Supplier FOCUS OFFICE FURNITURE LLC	\$0.0100 YEAR	Supplier ID 0000473215 Supplier Item ID Manufacturer ID Manufacturer Mfg Item ID UPN Type UPN ID Lead Time Days

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

**Click** the **Add to Cart** button for the appropriate Item.

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

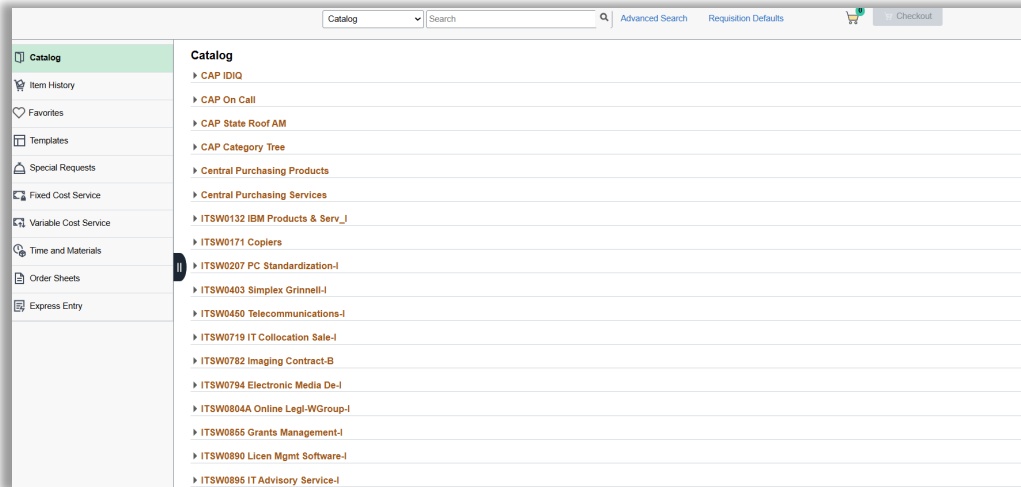
Complete Steps 4 and 5 shown above to submit the Requisition. (pages 18-26).



## Creating the Requisition (Catalog)

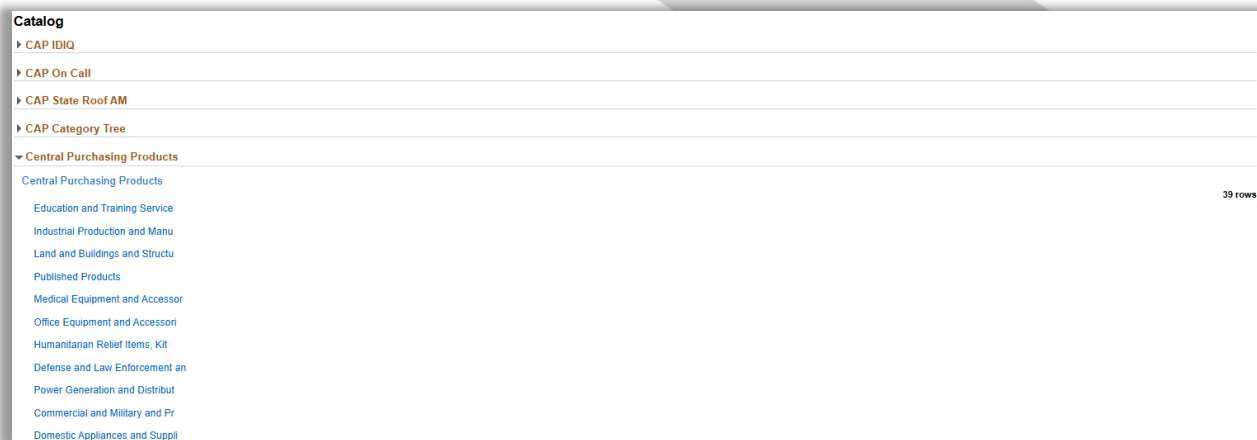
Complete Step 1 illustrated above (Pages 6-9).

### 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 screenshot shows a catalog interface with the following items:

Item ID	Description	Price	Action
1000006948	ENVELOPE #10 Box Regular, 2500/ctn, 24 lb. manufactured from recycled fibers (minimum 20% post consumer waste) , full cartons only. Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 12.4100 Box	+W Add to Cart
1000007426	ENVELOPE #10 Box w/windows in std place 2500/ctn, 24 lb. manufactured from recycled fibers (minimum 20% post consumer waste) , full cartons only Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 14.6900 Box	+W Add to Cart
1000011261	ENVELOPE 9X 12, Brown Open End, 2500, 500/CNT 28lb Kraft, plain unglazed, Catlog_gummed flap Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 49.1200 Thousand	+W Add to Cart
1000007000	ENVELOPE-Self seal flap-Envelopes, with self-seal flap-ENVELOPES WITH SELF-SEAL FLAPS Supplier: FRANK G LOVE ENVELOPES INC	\$ 38.0500 Box	+W Add to Cart
1000027510	ENVELOPE-Special #10 Double Window With Transparent Covering On Window 24# Whitewove No Printing Top Window Size: 1 1/8 Wide, 3 1/2 Length Top Window Location: 3/4 From Left, 2 3/8 From Bottom, 5/8 From Top Bottom Window Size 1 3/8 widem 4 1/4 Length Bo Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 35.9000 Case	+W Add to Cart

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

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

Click the **Add to Cart** 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 **Checkout** button.

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



## 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.

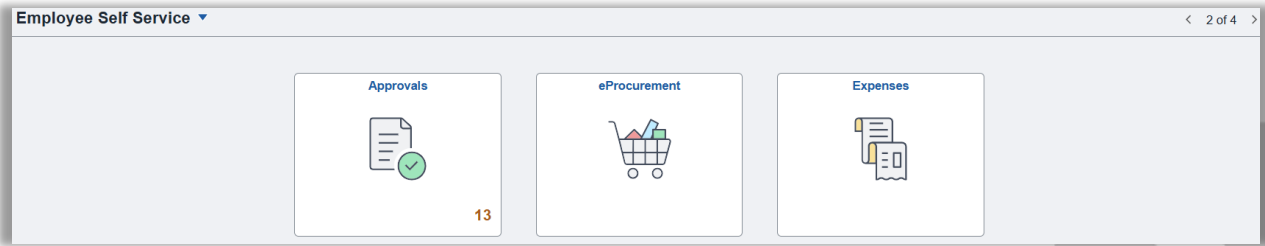
---

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

---



# Approvals Tile



From the **Home Page**, select the “Approvals Tile”

View By	Type	All			
🌐	All	13			
📄	Expense Report	4			
🛒	Requisition	9			
					13 rows
	<b>Requisition</b>	0.01 USD	FY24 CO21707 Moving Funds - 09000 / 0900019312 Maegan J Filonow (090)	⚠️ Medium Priority	Routed 05/13/2024 >
	<b>Requisition</b>	5,287,694.92 USD	FY25 NACEA Bond - 09000 / 0900019321 Luan Pham (090)	⚠️ Medium Priority	Routed 05/15/2024 >
	<b>Requisition</b>	23,222,944.33 USD	FY25 OCIA Bond - 09000 / 0900019322 Luan Pham (090)	⚠️ Medium Priority	Routed 05/15/2024 >
	<b>Requisition</b>	2,495.00 USD	Lease Return Freight Charge - 09000 / 0900019326 Lindsay Swihart	⚠️ Medium Priority	Routed 05/17/2024 >
	<b>Expense Report</b>	263.44 USD	Alonzo Salcido - 0000000398 / WSS Travel Support		Routed 05/20/2024 >
	<b>Expense Report</b>	344.61 USD	Kristin Youngblood - 0000000425 / WSS Travel Support		Routed 05/20/2024 >
	<b>Expense Report</b>	828.28 USD	Brian Kirkes - 0000000423 / WSS Travel Support		Routed 05/20/2024 >
	<b>Requisition</b>	24,972.00 USD	25-06 Termite Control on-call - 09000 / 0900019328 Cindy Holloway	⚠️ Medium Priority	Routed 05/20/2024 >
	<b>Requisition</b>	400.00 USD	09000 / 0900019333 Amber Adams (090)	⚠️ Medium Priority	Routed 05/28/2024 >
	<b>Expense Report</b>	794.88 USD	Brian Kirkes - 0000000430 / WSS Travel Support		Routed 05/29/2024 >
	<b>Requisition</b>	32.00 USD	09000 / 0900019339 Bosten Benn	⚠️ Medium Priority	Routed 07/12/2024 >
	<b>Requisition</b>	50.00 USD	Office Supplies: General_TST - 09000 / 0900019341 Bosten Benn	⚠️ Medium Priority	Routed 07/18/2024 >
	<b>Requisition</b>	100.00 USD	09000 / 0900019342 Sohan Asgaonkar Oracle	⚠️ Medium Priority	Routed 07/25/2024 >




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.

View By		Type	
	All		13
	Expense Report		4
	Requisition		9

- Date Routed – View Approvals by Date.




View By		Date Routed	
	All		13
	Last Week		1
	Two Weeks Ago		1
	Older		11

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





View By		From	
	All		13
	Alonzo Salcido		1
	Bosten Benn		2
	Brian Kirkes		1






- Priority – View Approvals by Priority Level.

View By		Priority	▼
	All	13	
	Medium Priority	9	
	No Priority	4	

- Requester – View Approvals by Requester.

View By		Requester	▼
	All	13	
	Amber Adams (090)	1	
	Alonzo Salcido	1	
	Bosten Benn	2	

Select **Type** from the View By dropdown.

View By		Type	▼
	All	13	
	Expense Report	4	
	Requisition	9	

Select Requisition.

## Requisition Approvals Page

Requisition			
<input type="checkbox"/>			9 rows
<input type="checkbox"/>	<b>Requisition</b> 0.01 USD	FY24 CO21707 Moving Funds - 09000 / 0900019312 Maegan J Filonow (090) ⚠ Medium Priority	Routed 05/13/2024 >
<input type="checkbox"/>	<b>Requisition</b> 5,287,694.92 USD	FY25 NACEA Bond - 09000 / 0900019321 Luan Pham (090) ⚠ Medium Priority	Routed 05/15/2024 >
<input type="checkbox"/>	<b>Requisition</b> 23,222,944.33 USD	FY25 OCIA Bond - 09000 / 0900019322 Luan Pham (090) ⚠ Medium Priority	Routed 05/15/2024 >
<input type="checkbox"/>	<b>Requisition</b> 2,495.00 USD	Lease Return Freight Charge - 09000 / 0900019326 Lindsay Swihart ⚠ Medium Priority	Routed 05/17/2024 >
<input type="checkbox"/>	<b>Requisition</b> 24,972.00 USD	25-06 Termite Control on-call - 09000 / 0900019328 Cindy Holloway ⚠ Medium Priority	Routed 05/20/2024 >
<input type="checkbox"/>	<b>Requisition</b> 400.00 USD	09000 / 0900019333 Amber Adams (090) ⚠ Medium Priority	Routed 05/28/2024 >
<input type="checkbox"/>	<b>Requisition</b> 32.00 USD	09000 / 0900019339 Bosten Benn ⚠ Medium Priority	Routed 07/12/2024 >
<input type="checkbox"/>	<b>Requisition</b> 50.00 USD	Office Supplies: General_TST - 09000 / 0900019341 Bosten Benn ⚠ Medium Priority	Routed 07/18/2024 >
<input type="checkbox"/>	<b>Requisition</b> 100.00 USD	09000 / 0900019342 Sohan Asgaonkar Oracle ⚠ Medium Priority	Routed 07/25/2024 >

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.

**Request for TST Requisition**  
100.00 USD [Approve](#) [Deny](#) [More](#)

Header is pending your approval

**Summary**

Business Unit 09000	Requisition ID 0900019343
Routed Date July 30, 2024	Requisition Date July 30, 2024
Requester Bosten Benn	Entered by Bosten Benn
	Budget Header Status Valid

[Edit Requisition](#)

**More Information**

[View Printable Version](#) >

**Lines** 1 row

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	TST REQUISITION	100.00 USD			>

Approver Comments

Approval Chain >

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.

**TST REQUISITION**  
100.00 USD

**Line Details**

Business Unit 09000 Requisition ID 0900019343  
 Line 1 Item ID  
 Supplier Quantity 1 EA  
 Price 100.00 USD Ship To 09000  
 Category 44120000

**Shipping Information**

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	09000	1 EA	100.00 USD	100.00 USD	Bosten Benn	>

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

**Distributions**

**Fluid Approval Distribution**

Line 1  
 Schedule 1  
 Item Description TST REQUISITION  
 Merchandise Amount 100.00 USD  
 Quantity 1.0000 EA

Distribution Line	Requisition Quantity	GL Business Unit	Merchandise Amount	Currency Code	Account	Alt Acct	Operating Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref	Sub-Account	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	CFDA#	ChartField	Affiliate	
1	1.0000	09000	100.00	USD	536130		ADM9999	1000	8800110	D0102	19401	24	01	09000	0900000000	000					2		

After reviewing the Distribution and Schedule details, click the [Back to Header](#) link on the Approval Line Details page.

**Request for TST Requisition**  
100.00 USD

[Approve](#) [Deny](#) [More](#)

Header is pending your approval

**Summary**

Business Unit 09000 Requisition ID 0900019343  
 Routed Date July 30, 2024 Requisition Date July 30, 2024  
 Requester Bosten Benn Entered by Bosten Benn  
 Budget Header Status Valid [Edit Requisition](#)

**More Information**

[View Printable Version](#) >

**Lines**

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	TST REQUISITION	100.00 USD			>

Approver Comments

Approval Chain >

Click the **Approve** 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 **Deny** button. If you select Deny, you must enter a reason in **Approver Comments** field.

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

## Edit Requisition in Approvals

**Request for TST Requisition**  
100.00 USD

[Approve](#) [Deny](#) [More](#)

Header is pending your approval

**Summary**

Business Unit 09000	Requisition ID 0900019343
Routed Date July 30, 2024	Requisition Date July 30, 2024
Requester Bosten Benn	Entered by Bosten Benn
	Budget Header Status Valid

[Edit Requisition](#)

▼ **More Information**

[View Printable Version](#)

▼ **Lines**

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	TST REQUISITION	100.00 USD			

Approver Comments

Approval Chain

From the Requisition Approval page, click the [Edit Requisition](#) link.

**Edit Shopping Cart for Requisition ID 0900019341**  
1 item(s) to buy now.

▼ **Requisition Summary**

Business Unit 09000

Requisition Name [Office Supplies: General\\_TST](#)

Requester BBENN06

Currency USD

Item Description	Status	Price	Currency	Quantity	Unit of Measure
OFFICE SUPPLIES: General desk/office supplies	Pending	50.00	USD	1.0000	EA

Total 50.00 USD

Click the [Item Description](#) hyperlink.

**Special Requests**

**Item Information**

\*Item Description [OFFICE SUPPLIES: General desk/office supplies](#)

\*Price 50.00

\*Quantity 1.0000

\*Category 44121600

Due Date

\*Currency Code USD

\*Unit of Measure EA

Amount Only  No

Request New Item  No

**Supplier Information**

Supplier ID 0000067919 [STAPLES INC](#)

Supplier Item ID

Supplier Location 0030

**Manufacturer Information**

Manufacturer ID

Manufacturer's Item ID

**Comment**

Comment Text

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

[Apply](#) [Return](#)

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

**Item Summary**

OFFICE SUPPLIES: General desk/office supplies

Item ID	Desk supplies	Buyer	AANDREWS Angela Andrews
Supplier ID	000067919 STAPLES INC	Manufacturer	
Supplier Location	0030	Manufacturer's Item ID	
Supplier Item ID		UPN Type	
		UPN ID	

Price 50.00 USD  
Quantity 1.0000 EACH  
Total Price 50.00 USD

**Attributes**

Special Request

---

**Schedule 1** + -

Schedule 1 Quantity 1.0000

\*Ship To 09000 Price 50.00 USD

Attention To Bosten Benn Total 50.00 USD

Due Date

Address OFFICE OF MANAGEMENT AND ENTERPRISE SERVICES ADMINISTRATION 122 STATE CAPITOL BUILDING OKLAHOMA CITY, OK 73105 One Time Address

Ship To Comments Price Adjustments Custom Fields

---

**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	Dist Type	Location	Quantity	Open Qty	Percent	Merchandise Amount	GL Business Unit
1	Open		09000	1.0000	1.0000	100.0000	50.00	09000

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.



**Requisition Details** [Print Preview](#)

Business Unit 09000	Total Lines 1
Requisition ID 0900019341	Total Amount 50.00 USD
Requisition Name Office Supplies: General_TST	Budget Checked Status <span style="color: red;">▲</span> Not Checked
Last Modified Date 08/02/2024 11:25:32AM	<a href="#">Check Budget</a> <a href="#">Pre-Check Budget</a>
Track Batch 1	
Status <span style="color: blue;">🔍</span> Pending Approval	

[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 check budget following the changes made to Requisition.



## Workflow Ad Hoc Feature

Request for Office Supplies: General\_TST  
50.00 USD

Header is pending your approval

Summary

Business Unit 09000  
Routed Date July 18, 2024  
Requester Bosten Benn

Requisition ID 0900019341  
Requisition Date July 18, 2024  
Entered by Bosten Benn  
Budget Header Status Valid  
[Edit Requisition](#)

More Information

View Printable Version >

Lines

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	OFFICE SUPPLIES: General desk/office supplies	50.00 USD			

1 row

Approver Comments

Approval Chain >

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

**Approval Chain**

Agency Approval Steps

Office Supplies: General\_TST Pending

Start New Path

Non IT 090

Approved

Victoria Casselman  
Accounting Validation (OK)  
08/01/24 2:32 PM >

Approved

Megan Meers  
Department Approver  
08/01/24 4:39 PM >

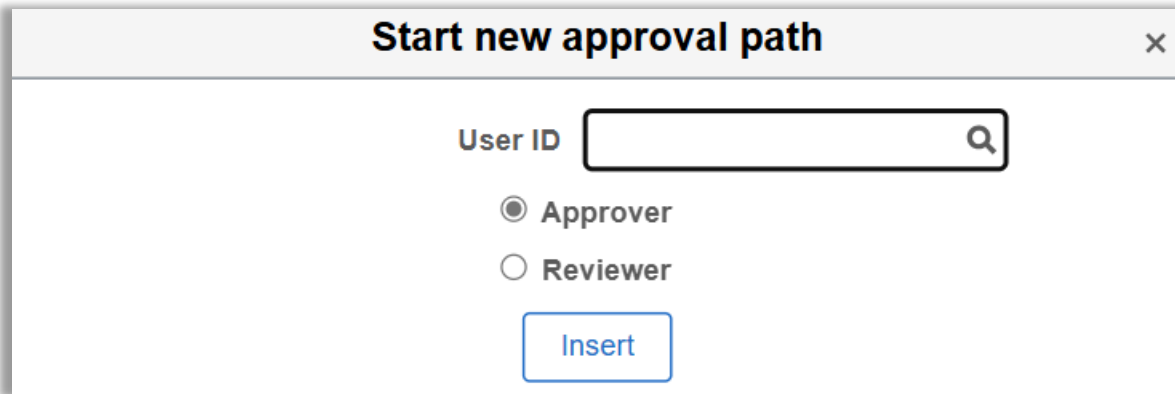
Pending +

Multiple Approvers  
Agency Buyer/CPO >

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.



The screenshot shows a dialog box titled "Start new approval path" with a close button (X) in the top right corner. Inside the dialog, there is a "User ID" label followed by a text input field with a search icon (magnifying glass) on the right. Below the input field are two radio button options: "Approver" (which is selected) and "Reviewer". At the bottom of the dialog is a blue "Insert" button.

**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.

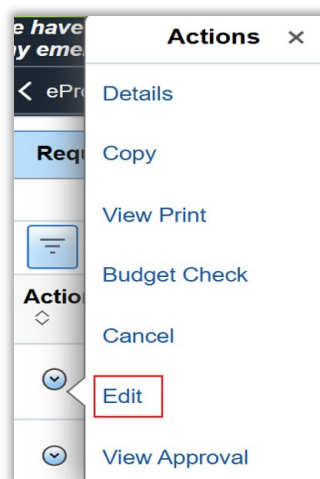
- Will always generate.
- Will either route to correct people or not.
  - If not routing to correct people, information on requisition is incorrect, i.e., category code or department ID.
- If path delayed:
  - Approvers in path are not approving it or requestor hasn't provided documentation.

### 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.

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

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## 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](mailto: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](mailto: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](#)

