



COW PeopleSoft Requisition user guide

Overview

Once the device order has been placed in the ServiceNow Computer Ordering Widget (COW), and the manager of the customer ordering the device has approved the order, the new order will appear in PeopleSoft Financials. The steps provided will assist in finding and working through the requisition process for these orders.

Steps

Step 1: After logging into PeopleSoft Financials, navigate to the Query Viewer, and run the ACS_SNOW_RITM_REQ_NO_B Query:

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

My Favorite Queries

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
BJP_PO_CHECK	Available Encumbrance Details	Private		HTML	Excel	XML	Schedule	Lookup References
ACS_SNOW_RITM_REQ_NO	SNOW RITM & Request Number	Public		HTML	Excel	XML	Schedule	Lookup References
ACS_SNOW_RITM_REQ_NO_A	SNOW RITM & Request Number	Public		HTML	Excel	XML	Schedule	Lookup References
ACS_SNOW_RITM_REQ_NO_B	SNOW RITM & Request Number	Public		HTML	Excel	XML	Schedule	Lookup References

Step 2: Once the queried results appear, look for your agency number, the requisition request ID and the status of “active”. Any “active” requisition request ID’ need to have the EPRO requisiton created.

Note: Any RITM Numbers that have a status of “processed” already have an EPRO requisition number and no action is needed.

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (134 kb)

[View All](#)

First 1-100 of 126 Last

Row	RITM Number	System Source	Run Type	Requesting Loader Bus Unit	Requisition Request ID	Status	Process Date	UOM	Req Qty	Price	Currency	Entered By	EIP Control ID	Long Descr
1	RITM0140494	BPO	One Request	13100	386	Active	03/28/2023	EA	1.0000	1356.00000	USD	OMES_SNOW	1517855152728899918800001	Lease Mobile Precision 3570
2	RITM0142581	BPO	One Request	04900	385	Active	03/28/2023	EA	1.0000	1403.00000	USD	OMES_SNOW	1151146267611135853200001	Lease Mobile Premium Latitude 7430
3	RITM0143849	BPO	One Request	09000	384	Processed	03/28/2023	EA	1.0000	1403.00000	USD	OMES_SNOW	1542931990019479761800001	Lease Mobile Premium Latitude 7430
4	RITM0136080	BPO	One Request	26500	383	Active	03/27/2023	EA	2.0000	200.74000	USD	OMES_SNOW	1368391145657930125300001	Dell Thunderbolt 4 Dock- WD22TB4
5	RITM0136079	BPO	One Request	26500	382	Active	03/27/2023	EA	2.0000	1403.00000	USD	OMES_SNOW	1873747772478381065800001	Lease Mobile Premium Latitude 7430
6	RITM0141573	BPO	One Request	13100	381	Active	03/27/2023	EA	1.0000	521.97000	USD	OMES_SNOW	160245095964979465100001	Latitude and Precision 3xxx and 5xxx Series Better Peripherals Bundle (Recommended)
7	RITM0141572	BPO	One Request	13100	380	Active	03/27/2023	EA	1.0000	1022.00000	USD	OMES_SNOW	1273290769324307688100001	Lease Basic Desktop OptiPlex 7000 - i5

Step 3: Navigate to the requisition loader screen and create a Run Control ID with no spaces and select Add". You need to create a unique Run Control ID each time you run the Requisition Loader.

Requisition Loader

[Find an Existing Value](#) [Add a New Value](#)

*Run Control ID

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step 4: Once "add" is selected, the screen will look like the image below.

Load Requisitions

Run Control ID [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Parameters

*System Source	<input type="text" value="BPO"/>	PO Batch
Run Type	<input type="text" value="One Request"/>	
*Requesting Loader Bus Unit	<input type="text" value="09000"/>	To <input type="text"/>
*Requisition Request ID	<input type="text"/>	
Replenish ID	<input type="text"/>	
Par Location ID	<input type="text"/>	Par Count ID <input type="text"/>
Auto Assign Req ID	<input type="text" value="When not specified"/>	<input type="text"/> <input type="checkbox"/> Create Mult Req
Auto Line Numbering	<input type="text" value="Auto Assign"/>	<input type="checkbox"/> Copy Item Spec
*Get Preferred Supplier	<input type="text" value="None"/>	

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step 5: The agency number is the Business Unit. Using the search icon will populate a list of the Requisition Request IDs that need to be converted to Epro Requisitions.

[Help](#)

Requesting Loader Bus Unit 09000
 System Source BPO
 Requisition Request ID =
 EIP Control ID begins with

Basic Lookup

Search Results

View 100 1-26 of 26

Requisition Request ID	Loader Line Status	EIP Control ID
327	Active	1320949824210698634400001
328	Active	1494556017915977173400001
329	Active	1630133487111950985600001
330	Active	1089916574344931437700001
338	Active	1271932487037001404400001
350	Active	1158268550950227561800001

Step 6: Select one. Click on the “add” button below right, confirm, and then select Run. This screen comes up.

Process Scheduler Request x

[Help](#)

User ID JTRUSHENSKI01 Run Control ID jtxxxx

Server Name Run Date 03/29/2023

Recurrence Run Time 12:35:07PM

Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Purchasing Requisition loader	PO_REQLOAD	Application Engine	Web	TXT	Distribution

Step 7: Select OK.

Step 8: Click the process monitor button.

The screenshot shows the 'Process List' tab selected. The 'View Process Request For' section includes filters for User ID (JTRUSHENSKI), Type, Last, 1 Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Save On Refresh' checkbox is checked. The 'Process List' table has one entry with Instance 26920651, Process Type Application Engine, Process Name PO_REQLOAD, User JTRUSHENSKI01, Run Date/Time 03/29/2023 12:35:07PM CDT, and Run Status Queued. The Distribution Status is N/A. Below the table are 'Save' and 'Notify' buttons and a breadcrumb trail 'Process List | Server List'.

Step 9: Click Refresh to update the run status.

The screenshot shows the 'Process List' tab selected. The 'View Process Request For' section is identical to the previous screenshot. The 'Process List' table now shows the Run Status as 'Success' (highlighted in yellow) and the Distribution Status as 'Posted'. The 'Save' and 'Notify' buttons are still present, and the breadcrumb trail remains 'Process List | Server List'.

Step 10: When the job has completed processing, the run status will read “Success”. Click on the details, then message log to find the resulting EPRO requisition number.

Process Detail

x

Process

Instance: 26920651	Type: Application Engine
Name: PO_REQLOAD	Description: Purchasing Requisition loader
Run Status: Success	Distribution Status: Posted

Run

Run Control ID: jboxxx
Location: Server
Server: PSUNX
Recurrence:

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Re-send Content

Message Log

x

Process

Instance: 26920651 Type: Application Engine
Name: PO_REQLOAD Description: Purchasing Requisition loader

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Severity	Log Time	Message Text	Explain
10	12:36:40PM	The last Requisition Id added was 0900017287 for PO Unit 09000	Explain
10	12:36:41PM	The number of Requisitions added was 1	Explain
	12:36:53PM	Published message with ID 4b45a0b8-ce58-11ed-8f86-6133f35df99d to create entry in folder GENERAL.	Explain
	12:36:53PM	Successfully posted generated files to the report repository	Explain

[Return](#)

Date/Time

Request Created On: 03/29/2023 12:35:56PM CDT
Run Anytime After: 03/29/2023 12:35:07PM CDT
Began Process At: 03/29/2023 12:36:07PM CDT
Ended Process At: 03/29/2023 12:36:52PM CDT

Actions

[Parameters](#) [View Log/Trace](#)

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

[Transfer](#) [View Lock](#)

Step 10: Navigate to the manage requisitions screen to see the request.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 09000	Requisition Name:	Request State: All but Complete	Budget Status:
Requisition ID:		Date From: 03/22/2023	Date To: 03/29/2023
Date From: 03/22/2023	Requester: JTRUSHENSKI01	Entered By:	PO ID:

[Search](#) [Clear](#) [Show Advanced Search](#)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0900017287	0900017287	09000	03/29/2023	Open	Not Chk'd	5,301.00 USD	[Select Action] Go

Step 11: Click on the "Req ID" to see the details.

Requisition Details

Requisition Summary

Business Unit: 09000	Requisition Name: 0900017287
Date: 03/29/2023	Requisition ID: 0900017287
Request State: Open	Total Amount: 5,301.00 USD
Requested For: JTRUSHENSKI01	Pre-Encumbrance Balance: 0.00 USD

Header Comments: [Lease Tablet Latitude 7320 Detachable + KB/Pen](#)

Expand lines to review shipping and accounting details

Requisition Lines

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	DISK DRIVE,DRIVE ACCESSORIES...	Not Source	No	3.0000 EACH	1767.000000USD	Open	5,301.00

[Edit Requisition](#)

[Return to Manage Requisitions](#)

Step 12: In this example, the item being purchased is a lease of 3 – Latitude 7320 tablets. Click on Header Custom Fields to show the Service Now Request (RITM) Number.

Custom Fields for Requisition Header
Help

Custom Character 1

Custom Character 2

Custom Date

Custom Field 1 RITM0104605

Custom Field 2

Custom Field 3

Custom Field 4

Return

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences
Requisition Settings

Requisition Summary

Business Unit	09000	Mgmt and Enterprise Services	Requisition Name	0900017287
Requester	JTRUSHENSKI01	Jon Trushenski	Requisition ID	0900017287
Currency	USD		Priority	Medium

Cart Summary: Total Amount 5,301.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	DISK DRIVE DRIVE ACCESSORIES A	1000001131		3.0000	EACH	1,767.00000	5301.00

SW Exception: SS Flag: SS Type:

Select All / Deselect All
 Select lines to:
 Add to Favorites
 Add to Template(s)
 Delete Selected
 Mass Change

Total Amount 5,301.00 USD

Step 13: At this point, the requisition may be edited to add the appropriate funding, contract, and category codes. The requisition header information is what flows back to Service Now and to Dell/Dell Finance once the PO is released. You may leave and zero out or delete the initial requisition line – personal preference. Do not attempt to combine RITM requests onto a single EPRO requisition – only the information in the Requisition header is what is automatically fed to the other systems.

Dell updates pricing quarterly, so please be sure that the pricing entered is on a Dell/Dell Finance price list that is in effect.

Purchases = Dell Marketing
 Leases = Dell Financial Services

CONTRACT

Dispatch via Print

Supplier 0000064870 DELL MARKETING LP 1 DELL WAY ROUND ROCK TX 78682-7000 USA	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Contract ID</td> <td>0000000900000000000004179</td> <td>Page</td> <td>1 of 2</td> </tr> <tr> <td>Contract Dates</td> <td>10/08/2015 to 07/31/2023</td> <td>Currency</td> <td>USD</td> </tr> <tr> <td>Description:</td> <td colspan="3">SW1020D-Computer Equip</td> </tr> <tr> <td>Allow Open Item Reference</td> <td colspan="3">TYPE: STATEWIDE</td> </tr> </table>	Contract ID	0000000900000000000004179	Page	1 of 2	Contract Dates	10/08/2015 to 07/31/2023	Currency	USD	Description:	SW1020D-Computer Equip			Allow Open Item Reference	TYPE: STATEWIDE		
Contract ID	0000000900000000000004179	Page	1 of 2														
Contract Dates	10/08/2015 to 07/31/2023	Currency	USD														
Description:	SW1020D-Computer Equip																
Allow Open Item Reference	TYPE: STATEWIDE																

Tax Exempt? Y Tax Exempt ID: P36017987

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Qty	Order Qty	Amt	Maximum / Open Qty	Open Amt
1	43211507 / Dell Desktop Computers	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
2	43211503 / Dell Notebook Computers	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
3	43211509 / Dell Tablet Computers	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
4	43201800 / Dell Data Storage Devices	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
5	43211501 / Dell Servers	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
6	43212103 / Dell Printers	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
7	43211600 / Dell Accessories	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.0000		
8	43211600 / Dell Drives	EA	1.00	0.00	0.00	0.00	0.00

CONTRACT

Dispatch via Print

Supplier 0000064944 DELL FINANCIAL SERVICES LLC ONE DELL WAY ROUND ROCK TX 78682-7000 USA	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Contract ID</td> <td>00000000000000000000004862</td> <td>Page</td> <td>1 of 1</td> </tr> <tr> <td>Contract Dates</td> <td>07/19/2017 to 07/31/2023</td> <td>Currency</td> <td>USD</td> </tr> <tr> <td>Description:</td> <td colspan="3">SW1020D-Computer Equip Lease</td> </tr> <tr> <td>Allow Open Item Reference</td> <td colspan="3">TYPE: STATEWIDE</td> </tr> </table>	Contract ID	00000000000000000000004862	Page	1 of 1	Contract Dates	07/19/2017 to 07/31/2023	Currency	USD	Description:	SW1020D-Computer Equip Lease			Allow Open Item Reference	TYPE: STATEWIDE		
Contract ID	00000000000000000000004862	Page	1 of 1														
Contract Dates	07/19/2017 to 07/31/2023	Currency	USD														
Description:	SW1020D-Computer Equip Lease																
Allow Open Item Reference	TYPE: STATEWIDE																

Tax Exempt? Y Tax Exempt ID: P36017987

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Qty	Order Qty	Amt	Maximum / Open Qty	Open Amt
1	81112400 / Desktop Computer Lease	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.00000		
2	81112400 / Laptop Computer Lease	EA	1.00	0.00	0.00	0.00	0.00
	Contract Base Pricing				0.00000		

COMMENTS:

NASPO ValuePoint Cooperative Purchasing Program
 Computer Equipment, Peripherals, and Related Services
 Master Agreement No. MNWNC-108
 Oklahoma Contract Number: SW1020D
 Contract Period 02/27/2022-07/31/2023
 Agreement Period 04/01/2020 - 07/31/2023
 Contract No. MNWNC-108 extended at the same terms, conditions, prices.