COW PeopleSoft Requistion 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 requestion 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  [Query Name]  begins with

Search  Advanced Search

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 requestion number and no action is needed.
**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 Screen](image)

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

![Load Requisitions Screen](image)
**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.

![Screen shot of search results](image)

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

![Screen shot of process scheduler request](image)
Step 7: Select OK.

Step 8: Click the process monitor button.

Step 9: Click Refresh to update the run status.

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

Step 11: Click on the “Req ID” to see the details.
**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](image)

**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