



COW PeopleSoft Requisition user guide

Version 3.0

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	28500	383	Active	03/27/2023	EA	2.0000	200.74000	USD	OMES_SNOW	1368391145657930125300001	Dell Thunderbolt 4 Dock- WD22TB4
5	RITM0136079	BPO	One Request	28500	382	Active	03/27/2023	EA	2.0000	1403.00000	USD	OMES_SNOW	187374772478381065800001	Lease Mobile Premium Latitude 7430
6	RITM0141573	BPO	One Request	13100	381	Active	03/27/2023	EA	1.0000	521.97000	USD	OMES_SNOW	1602450959664979465100001	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.

The screenshot shows a window titled "Requisition Loader". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "*Run Control ID" containing the value "JT3-7-23". A blue "Add" button is positioned below the input field. At the bottom of the window, there are two links: "Find an Existing Value" and "Add a New Value".

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

The screenshot shows a window titled "Load Requisitions". At the top, it displays "Run Control ID jtbxxx" and navigation links for "Report Manager", "Process Monitor", and a "Run" button. Below this is a section titled "Process Request Parameters" containing several input fields and dropdown menus: "*System Source" (BPO), "Run Type" (One Request), "*Requesting Loader Bus Unit" (09000), "*Requisition Request ID", "Replenish ID", "Par Location ID", "Par Count ID", "Auto Assign Req ID" (When not specified), "Auto Line Numbering" (Auto Assign), and "*Get Preferred Supplier" (None). There are also checkboxes for "Create Mult Reqs" and "Copy Item Spec". At the bottom, there are buttons for "Save", "Notify", "Add", and "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]

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.

[Help](#)

Process Scheduler Request

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: Select the Process List tab.

View Process Request For

User ID: JTRUSHENSKI Type: Last: 1 Days Refresh
Server: Name: Instance From: Instance To: Clear
Run Status: Distribution Status: Save On Refresh Reset

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	26920651		Application Engine	PO_REQLOAD	JTRUSHENSKI01	03/29/2023 12:35:07PM CDT	Queued	N/A	Details	▼ Actions

Go back to Requisition Loader

Save Notify

Process List | Server List

Step 9: Click Refresh to update the run status.

View Process Request For

User ID: JTRUSHENSKI Type: Last: 1 Days Refresh
Server: Name: Instance From: Instance To: Clear
Run Status: Distribution Status: Save On Refresh Reset

Process List

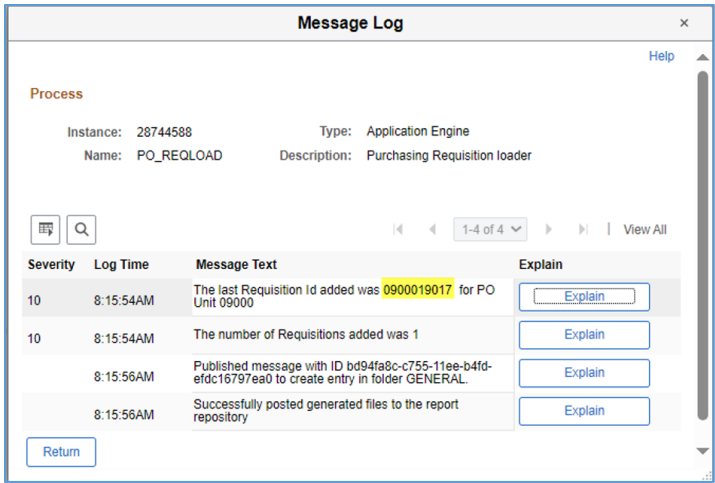
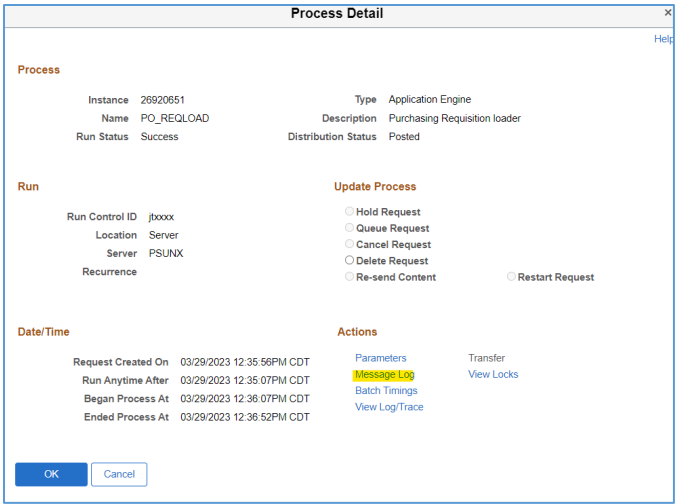
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	26920651		Application Engine	PO_REQLOAD	JTRUSHENSKI01	03/29/2023 12:35:07PM CDT	Success	Posted	Details	▼ Actions

Go back to Requisition Loader

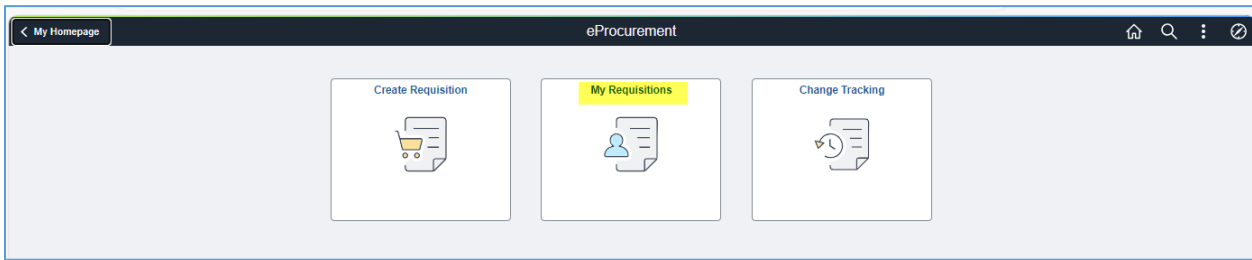
Save Notify

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.



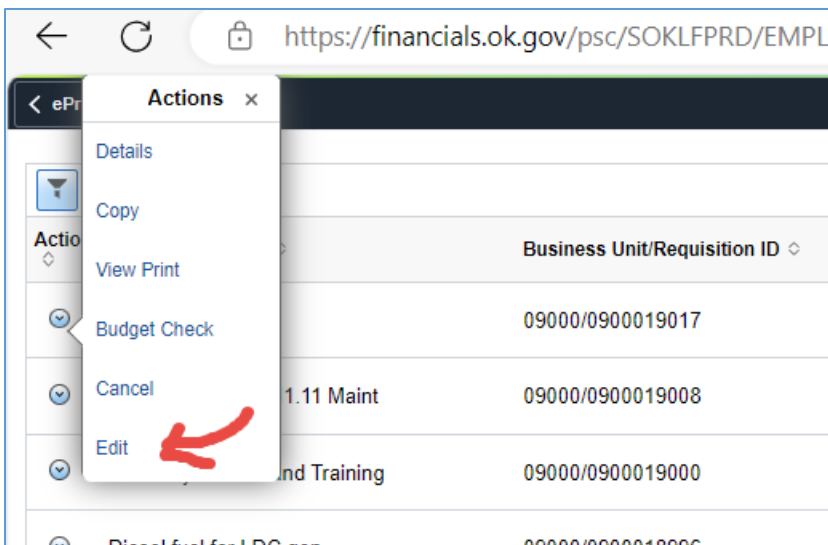
Step 10: Navigate to the My Requisitions screen in eProcurement to see the request.



eProcurement My Requisitions 25 rows

Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0900019017	09000/0900019017	02/09/2024	JTRUSHENSKI01	Open	Not Chk'd	1,712.00 USD
	REMI Quote 646711.11 Maint	09000/0900019008	02/05/2024	JTRUSHENSKI01	Pending	Valid	1,125,001.26 USD

Step 11: Click on the "action button" in front of the requisition number to edit the requisition.



Step 12: In this example, the item being purchased is a wireless headset

All Search [Advanced Search](#) [Requisition Defaults](#)

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

8_HDR_WRK_PV_MOB_BACK}

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. 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. It is also at this point where a requisition may be cancelled – and that will cancel the RITM request in Service Now.

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		Contract ID 000000000000000000007021 Page 1 of 2	
		Contract Dates 08/08/2023 to 07/19/2027 Currency USD Rate Type CRRNT Rate Date PO Date	
Tax Exempt? Y Tax Exempt ID: 736017987		Description: SW1020D Dell Computer Equip. Contract Maximum 0.00	
Allow Open Item Reference TYPE: STATEWIDE			

Contract Lines:

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Order Qty	Amt	Maximum / Open Qty	Amt
1	43211507 / Dell Desktop Computers	EA	1.00	0.00	0.00	0.00
	Contract Base Pricing			0.01000	EA	0001
2	43211503 / Dell Notebook Computers	EA	1.00	0.00	0.00	0.00
	Contract Base Pricing			0.01000	EA	0001
3	43211509 / Dell Tablet Computers	EA	1.00	0.00	0.00	0.00
	Contract Base Pricing			0.01000	EA	0001
4	43201800 / Dell Data Storage Devices	EA	1.00	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

Contract ID		Page	
000000000000000000000000007022		1 of 1	
Contract Dates	Currency	Rate Type	Rate Date
08/08/2023 to 07/19/2027	USD	CRRNT	PO Date
Description:		Contract Maximum	
SW1020D Dell Comp Equip Lease		0.00	
Allow Open Item Reference			
TYPE: STATEWIDE			

Tax Exempt? Y Tax Exempt ID:736017987

Contract Lines:

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Order Qty	Amt	Maximum / Open Qty	Amt
1	81112400 / Desktop Computer Lease	EA	1.00	0.00	0.00	0.00
	Contract Base Pricing			0.00000	EA	0001
2	81112400 / Laptop Computer Lease	EA	1.00	0.00	0.00	0.00
	Contract Base Pricing			0.00000	EA	0001

COMMENTS:

Contract Period: 07/19/2023 -- 07/19/2024
Agreement Period: 07/19/2023 -- 07/19/2027

Vendor Contact: Gary.Albright@dell.com
Added auto-renewal extension through 7/19/27. di (090) 7/15/24

Step 14: Step 14 Enter your financial codes, delete the placeholder line (Line 1) Save and Submit your requisition. Don't forget to budget check it – that will initiate the EPRO workflow.

Edit Requisition

Additional Fields

Justification Comment: OMES-ISD is purchasing a Dell Premier Wireless ANC Headset - WL7022 for AJ Workman. RITM #: RITM0335327 SW1020D FY24 Budget Line: 8286

Requisition Lines Overview

Select All Actions Mass Change

Line #	Item ID	Supplier	Status	Amount Only	Quantity	Unit of Measure	Price	Currency	Total
1	1000001131		Open	No	1.0000	EA	173.99	USD	173.99 USD
2		DELL MARKETING LP	Open	No	1.0000	EA	173.99	USD	173.99 USD

Order Total 347.98 USD