

# State of Oklahoma

## COR130

### Release of Statewide Contracts Manual

Office of Management & Enterprise Services



**OKLAHOMA**

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## Document History

Document Revision	Date	Description
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)
3.0	5/11/2026	Updated Screenshots and ADA Compliance



# Statewide Contracts

## Overview

Visit the Office of Management and Enterprise Services [Statewide Contract Search website](#).

**Oklahoma Statewide Contract Search**

Search active statewide contracts available for use by state agencies, municipalities, institutes of higher education, school districts, and other local governmental units.

**How to Use These Contracts**

**To Order:** Contact the vendor directly for quotes, statements of work, and project availability.

**Pricing:** The prices shown are the contract ceiling rate, established through a competitive procurement process. Agencies are always encouraged to negotiate for further price reductions, particularly for large-volume purchases.

Contracts **1380** Categories Contact Us

**Filters**

**Designation**

- Mandatory
- State Use
- Suggested

**Contract Type**

- IT
- Non-IT

**Origin**

- Equalis
- MMCAP
- NASPO
- Oklahoma Solicitation
- OMNIA
- Sourcewell
- Texas DIR

**Contracts Expiring Before**

mm/dd/yyyy

Search by SW#, PS Dispatch ID, supplier, supplier ID, brand, or product

Search in:  Contract  Supplier  Keywords  Category

Showing 1-9 of 1360 contracts Per page: 9 < 1 2 3 4 5 ... 152 >

**SW0012M BOOKS**  
BARNES & NOBLE INC  
SW0012M  
Emily Duren  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

**SW0012M BOOKS**  
COMPLETE BOOK AND MEDIA SUPPLY LLC  
SW0012M  
Emily Duren  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

**SW0012M BOOKS**  
EMERY-PRATT COMPANY  
SW0012M  
Emily Duren  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

**SW0012M BOOKS**  
GL GROUP INC  
SW0012M  
Emily Duren  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

**SW0012M BOOKS**  
HERTZBERG-NEW METHOD INC  
SW0012M  
Emily Duren  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

**SW0003M WATER TREATMENT CHEM**  
BRENNTAG SOUTHWEST INC  
SW0003M  
Darlene Saltzman  
Ends: 08/30/2026  
Leisure reading books Encyclopedias  
+1  
3 Attachments  
View Details →

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...).

The screenshot displays a web application interface for a procurement system. At the top, there are navigation tabs: 'Contracts' (with a count of 5), 'Categories', and 'Contact Us'. Below the navigation is a search bar containing the text 'staples'. Underneath the search bar, there are checkboxes for 'Contract', 'Supplier', 'Keywords', and 'Category', all of which are checked. The interface indicates 'Showing 1-5 of 5 contracts' and 'Per page: 9'. The main content area shows three contract cards. The first card is for 'SW2007SU OFFICE HOUSE PROD' by 'GARVIN COUNTY COMMUNITY LIVING CNTR INC', with an end date of 12/30/2030 and categories like 'Printer or facsimile or photocopier cleaning supplies' and 'Printer or facsimile or photocopier drums'. The second card is for 'SW0180M OFFICE SUPPLY PRODUCTS' by 'STAPLES INC', with an end date of 02/01/2029 and category 'Desk supplies'. The third card is for 'SW2007SU OFFICE HOUSE PROD' by 'PEOPLE FIRST INDUSTRIES OF BRYAN COUNTY', with an end date of 12/30/2030 and categories like 'Correction fluid' and 'Erasers +8'. A left-hand sidebar contains filter options under 'Designation', 'Contract Type', and 'Origin'.

From this page you can refine your search criteria or **select the Solicitation Number** link.



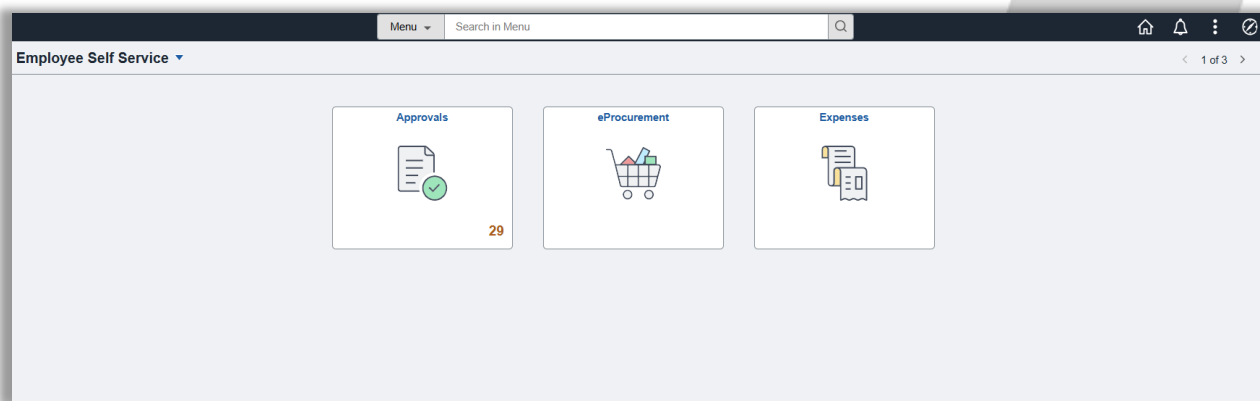
# Releasing of Contracts from Requisitions

## Overview

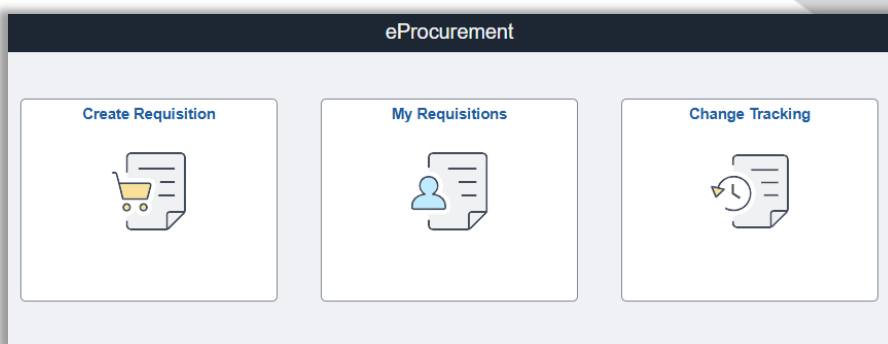
For Statewide contract purchases, a Purchase Order can be created directly without having to enter a requisition first. However, some agencies may still desire or require a requisition be entered in order to release the contract.

## Create a Requisition

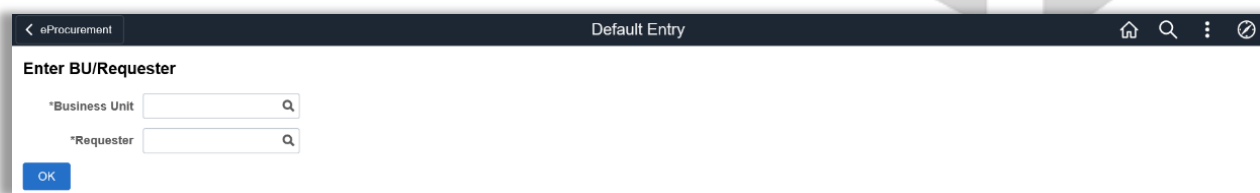
**Navigation:** *eProcurement Tile > Create Requisition Tile*



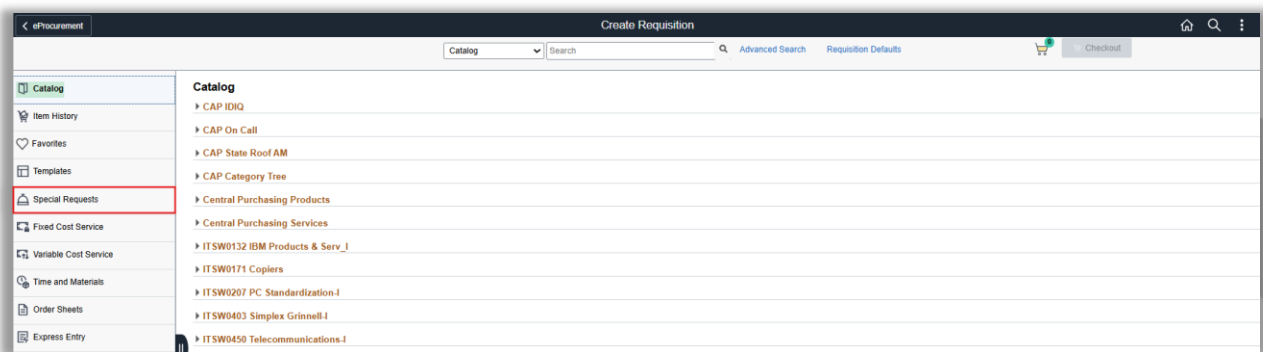
From the Home Page, **select** the **eProcurement** tile.



The eProcurement Menu opens. **Select** the **Create Requisition** tile.



The user may need to enter their Business Unit and select **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.”**

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**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**.

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**Select** 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](https://unspsc.org) or use the looking glass to search.

**Select** 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 with a 'Search By' dropdown menu set to 'Category'. Below this is a 'Category' input field with a dropdown menu open, showing 'Category' and 'Description' as options. A 'Find' button is located to the left of the input field. The text 'Categories' is displayed below the input field, and '61250 rows' is shown in the bottom right corner.

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 select the **Find** button to show Categories beginning with those numbers.
- Or use all eight numbers if the 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.

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 input field, the text 'Categories' is displayed, and '1 row' is shown in the bottom right corner. A table with three columns: 'Catalog', 'Category', and 'Description' is shown. The table contains one row with the following data:

Catalog	Category	Description
1 IT_CATALOG	60101725	Technology activity or resource

**Select** 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	3011600	Cement and lime
2	IT_CATALOG	3011600	Cement and lime

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



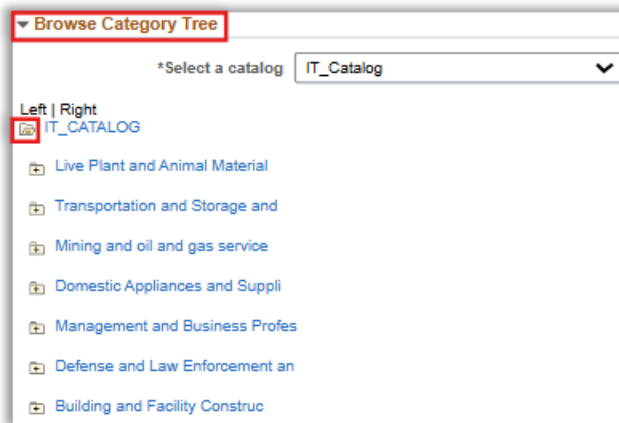
## Browse Category Tree

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.

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

---



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

Expand the sections as necessary, then **select** 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 sections:

- Item Information:** \*Item Description (Training), \*Price (100), \*Quantity (1), \*Category (80101725), Due Date, \*Currency Code (USD), \*Unit of Measure (EA), Amount Only (No), Request New Item (No).
- Supplier Information (highlighted):** Supplier ID, Supplier Item ID, Supplier Location.
- Manufacturer Information:** Manufacturer ID, Manufacturer's Item ID.
- Comment:** Comment Text, Send Comment to Supplier, Show Comment on Receipt, Show Comment on Voucher.

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

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.

**Select** the looking glass icon to search.

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

- Supplier SetID: 00000
- Supplier ID
- Supplier Name
- Short Supplier Name
- Alternate Supplier Name
- Country
- City
- State
- Postal Code

Buttons for 'Search' and 'Clear' are at the bottom.

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

**Select** the **Search** button.

Search Results								1 row
Supplier ID	Supplier Name	Short Supplier Name	Default Location	Address Line 1	City	State	Postal Code	
0000585593	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: 80101725
  - Due Date: [Calendar icon]
- Supplier Information:**
  - Supplier ID: 0000585563 (SLALOM INC)
  - Supplier Location: 0001
- 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, select 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]
- Supplier Information:**
  - Supplier ID: [Empty]
  - Supplier Location: [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 BBENN06 Bosten Benn

Currency USD

Header Comments

**Additional Fields**

**Justification Comments**

**Requisition Lines Overview**

Select All Actions

Line	Description	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	Actions
1	Special Request Training	No	1,000	EA	100.00	USD	100.00 USD	<input type="checkbox"/> <input type="button" value="ScheduleDetails"/> >

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., FY26,2ndRenewal5yr).
- 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.

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

## Define Schedule/Distribution Details

**Line 1**

**Schedule Details** | Line Details

**Item Summary**

**Training**

Item ID  
Item Category Technology activity or resource  
Supplier ID 000056563 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  
UPN Type  
UPN ID

**Attributes**  
Special Request

**Schedule 1** (+) (-)

Schedule 1  
\*Ship To 09020030  
Attention To Bosten Beem  
Due Date  
Address OMES-CENTRAL PURCHASING  
DIVISION 2481 N LINCOLN  
BLVD, SUITE 116 OKLAHOMA  
CITY, OK 73105 (One Time Address)  
Ship To Comments | Price Adjustments | Custom Fields

Quantity 1.0000  
Price 100.00 USD  
Total 100.00 USD

**Distributions**

Please enter GL Business Unit before selecting charfield 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		09020030	1.0000	1.0000	100.0000	100.00	09000

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



# Chartfields Tabs – Budget/Funding Information

## Chartfields 1 Tab

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By: Quantity

1 row

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		09020030	1.0000	1.0000	100.0000	100.00	09000

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

**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

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By: Quantity

1 row

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

Account	Operating Unit	Fund Type	Dept	Program	Class Funding	Bud Ref
538190						

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

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By: Quantity

1 row

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

Sub Account	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	CFDM	ChartField 2

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

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By

1 row

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

Affiliate	Fund Affil	Class Funding Affiliate	IN Unit	Stat	Open Quantity	Merchandise Amount Base	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	1.0000	100.00	Dollar

## Budget Information Tab

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By

1 row

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

Budget Status	Budget Date	Pre-Encumbrance Balance	Currency	Business Unit Base Currency
Not Chk'd	11/18/2024	0.000	USD	USD

**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

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

\*Distribute By

1 row

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

AM Business Unit	Profile ID	Tag Number	CAP #	Sequence	Empl ID	Capitalize	Cost Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Non Cap"/>	<input type="text"/>

Enter asset information as necessary.

Select 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 06000 Mgmt and Enterprise Services  
 Requisition Name SW\_RELEASE\_MANUAL  
 Requirer BBENND6 Bosten Benn  
 Currency USD  
 Priority Medium

Header Comments

**Additional Fields**

**Justification Comments**

**Requisition Lines Overview**

Select All Actions

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

Order Total 100.00 USD

**Line 1**

Schedule Details **Line Details**

**Item Summary**

**Training**

Item ID  
 Item Category Technology activity or resourc  
 Original Substituted Item  
 Long Description Training  
 Price 100.00 USD  
 Quantity 1.0000 EACH  
 Total Amount 100.00 USD

Physical Nature Goods  
 Buyer IBOWMAN  
 Buyer Information  
 Show Configurator

**Attributes**

Special Request

**Flags**

Solicitation/Change Order/Ratification  
 Sole Source Flag  
 Statutory Exemption Flag  
 Contract Release Flag

Sole Source Type  
 Statutory Exemption Type  
 Statutory Exemption Desc  
 Statutory Exemption Comments

Expand All Collapse All

**Item Additional Information**

**Contract Information**

Use Contract if Available   
 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. **Select the Right Arrow** icon, found in the Requisition Line Overview of the **Checkout page**. Alternatively, the user may select the Schedule Details button to the left of the arrow to open the page.
2. **Select 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	IBOWMAN
Long Description	Training	
Price	100.00 USD	
Quantity	1.0000 EACH	
Total Amount	100.00 USD	

Buyer Information Show Configurator

**Attributes**

Special Request

**Flags**

Solicitation/Change Order/Ratification

Sole Source Flag

Statutory Exemption Flag

Contract Release Flag

Sole Source Type

Statutory Exemption Type

Statutory Exemption Desc

Statutory Exemption Comments

Expand All Collapse All

**Item Additional Information**

**Contract Information**

Use Contract if Available

Contract ID

Contract Version

Contract Line

Category Line

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.



## Define Contract Information

The **Line Details** page allows the user to define additional line details for the Requisition. When releasing a Statewide Contract, the **Contract Information** section must be populated.

**Select** the Contract Search icon, outlined above. The user may also use the magnifying glass to the left of the contract search icon.

Item Details		Contract Reference	Contract Details	Item Information	Show All			
Select ↑↓	Contract ID ↑↓	Contract Version ↑↓	Contract Reference Type ↑↓	Category ↑↓	Item ID ↑↓	Item Description ↑↓	Contract Base Price ↑↓	Use Contract Base Price ↑↓
<input type="checkbox"/>	00000000000000000000000007507	1	Open Item					

If the Supplier Information was entered when adding the line, the contract will be shown on this page. If not, the user can search for the Contract using the **Contract ID** or **Description** field.

Select	Contract ID	Contract Version	Description	Supplier ID	Supplier Name	Administrator	Master Contract ID	Contract Style	Contract Process Option	Begin Date	Expire Date	Contract Remaining Amount	Supplier Contract Ref	Punchout Pricing Option
<input checked="" type="checkbox"/>	000000000000000000000000007507	1	SW1050 DELIVERABLE IT SVCS	0000585563	SLALOM INC	GDRENNAN		Purchase Order	Purchase Order	08/07/2024	03/31/2029			Always Use Contract Price

Select the **Select** button in the Contract Details section, outlined above, to attach the contract to the Requisition.

Select the **Done** button to exit the Contract Search page.

A default buyer was found. Would you like to override the current Buyer Id with the default value?  
 Select 'No' to keep the current Buyer Id you have defined.  
 Select 'Yes' to override the current Buyer Id with the default value

Yes No

The system may prompt the user to select between the Default Buyer for the Contract or to keep the Buyer entered on the requisition. Select the **Yes** button if the user desires to use the Default Buyer.

Use Contract if Available

Contract ID 0000000000000000000000007507

Contract Version 1

Contract Line

Category Line

[Contract Details](#)

The **Contract Information** section updates with the Contract ID.

**Input** the **Contract Line**, if applicable, to define the Contract Line the requisition will be released against.

**Line 1**

Schedule Details **Line Details**

Item Summary

Training

Item ID  
Item Category Technology activity or resourc  
Original Substituted Item  
Long Description Training  
Price 100.00 USD  
Quantity 1.0000 EACH  
Total Amount 100.00 USD

Physical Nature Goods  
Buyer IBOWMAN  
Buyer Information  
Show Configurator

Attributes  
Special Request

Flags

Solicitation/Change Order/Ratification  
Sole Source Flag  
Statutory Exemption Flag  
Contract Release Flag

Sole Source Type  
Statutory Exemption Type  
Statutory Exemption Desc  
Statutory Exemption Comments

Expand All Collapse All

Item Additional Information

Contract Information

Use Contract if Available   
Contract ID 0000000000000000000000007507  
Contract Version 1

Contract Line  
Category Line  
Contract Details

Supplier Information  
Manufacturer Information  
Sourcing Controls

After adding the Contract to the Requisition, the user must select the **Contract Release Flag**.

Requisition Line Details

Line 1

Schedule Details **Line Details**

Item Summary

Training

Item ID  
Item Category Technology activity or resourc  
Original Substituted Item  
Long Description Training  
Price 100.00 USD  
Quantity 1.0000 EACH  
Total Amount 100.00 USD

Physical Nature Goods  
Buyer IBOWMAN  
Buyer Information  
Show Configurator

Attributes  
Special Request

Flags

Solicitation/Change Order/Ratification  
Sole Source Flag  
Statutory Exemption Flag  
Contract Release Flag

Sole Source Type  
Statutory Exemption Type  
Statutory Exemption Desc  
Statutory Exemption Comments

Expand All Collapse All

Item Additional Information

Contract Information

Use Contract if Available   
Contract ID 0000000000000000000000007507  
Contract Version 1

Contract Line  
Category Line  
Contract Details

Supplier Information  
Manufacturer Information  
Sourcing Controls

Done

After completing the Schedule/Distribution and Line details for the Requisition, select the **Done** button in the top right of the page.

## Submit the Requisition

**Create Requisition**

Checkout Continue Shopping Save **Submit**

Order Total 100.00 USD

**Requisition Summary**

Business Unit 09000 Mgmt and Enterprise Services  
 Requisition Name SW\_RELEASE\_MANUAL  
 Requester JBUMGARNER Joshua Bumgarner  
 Currency USD  
 Priority Medium

**Additional Fields**

**Justification Comments**

**Requisition Lines Overview**

Line 1	Special Request	Amount Only	Quantity	Unit of Measure	Price	Currency	Total
1	Special Request		1.0000	EA	100.00	USD	100.00 USD

Order Total 100.00 USD

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

**Requisition Details** Print Preview

Business Unit 09000  
 Requisition ID 0900020548  
 Requisition Name SW\_RELEASE\_MANUAL  
 Last Modified Date 01/05/2026 12:05:13PM  
 Status Pending Approval  
**View Approval Chain**

Total Lines 1  
 Total Amount 100.00 USD  
 Budget Checked Status **Not Checked**  
**Check Budget** Pre-Check Budget

**Next Steps**

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

Select 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	Requester	Bosten Benn
Business Unit	09000	Entered By	Bosten Benn
Requisition ID	0900019676	Budget Check Status	Valid
Requisition Date	11/18/2024	Total Amount	100.00 USD
Request State	Approved		

**Requisition Lifeline**

Requisition → Approvals → Inventory → Purchase Orders → 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.

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

**Enter** the Business Unit and Requisition ID you wish to expedite to a Purchase Order.  
**Select** 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: 09000  
 Requisition ID: 0900019677  
 Requisition Name:  
 Requester:  
 Buyer:

Category:  
 Supplier Name:  
 Include Lines With No Supplier

---

**Requisition Schedule Lines**

1-1 of 1 | View All

Sourcing  Item Substitution

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: BBENN06  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.

**Select** 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	<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"/>		

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	<input type="text" value="BBENN06"/>	<input type="checkbox"/> Build POs as Approved
-------------------	--------------------------------------	--

[Go to Process Monitor](#)

Select 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: BBENN06 Type: Last 10 Days Refresh Clear Reset

Server: Name: Instance From: Instance To: Save On Refresh Report Manager

Run Status: Distribution Status: Run Status: Success

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

Select 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**

The screenshot displays the Sourcing Workbench interface. At the top, it says "Sourcing Workbench" and "Sourcing". Below this is a "Search Criteria" section with a dropdown arrow. The search criteria are organized into two columns:

- Left Column:** Process Instance (text input with search icon), Business Unit (text input with value "09000" and search icon), Requisition ID (text input with value "0900019677" and search icon), Requisition Name (text input with search icon), Buyer (text input with search icon), Contract SetID (text input with search icon), and Contract ID (text input with search icon).
- Right Column:** System Source (dropdown menu), PO Stage Type (dropdown menu), PO Stage ID (text input), Stage Status (dropdown menu), Item ID (text input with search icon), Line Number (text input), and Schedule Number (text input).

Below the search criteria are several action buttons: a "Search" button, a "Select All" checkbox (checked), an "UnSelect All" checkbox (unchecked), "Purge" and "Recycle" buttons, and "Save", "Notify", and "Refresh" buttons.

**Enter the Business Unit and Requisition ID**

or

**Enter the Process Instance Number** from the previous page.

**Select the Search** button.



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



## 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

All Lines From Req

**Select Requisition Lines**

**Sourcing** | Requisitions | Change Supplier | Contract Information | Item Substitution

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 select the **Search** button to retrieve the Requisition.

**Select Requisition Lines**

**Sourcing** | Requisitions | Change Supplier | Contract Information | Item Substitution

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

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

Select 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="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		Item Availability

Select All  Clear All

Staging Information

After selecting the **Save** button, select the **Create PO's** button.

Objectives Options Results

Run Control ID: ONLSRC

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: BRICHARDSON1  Bob Richardson

**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

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.

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

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

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

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

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

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

**Process List**    **Server List**

---

**View Process Requests**

User ID: BRICHARDSON Q    Type:     Last:     1    Days:     [Refresh](#)

Server:     Name:  Q    Instance:     Range:     [Clear](#)

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

---

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	33174873		ONLSRC	Application Engine	PO_AUTO_SRC	BRICHARDSON01	05/04/2026 10:20:13AM CDT	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 select the **Search** button.

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"/>	29699273	Completed	09000	Irene Bowman (580)	0000585563	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 **selecting** 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   Hold From Further Processing

**Header**

\*PO Date 11/18/2024 Supplier Search Doc Tot Status Not Chk'd  
 \*Supplier SLALOM INC-001 Supplier Details Receipt Status Not Recvd  
 \*Supplier ID 0000585563 SLALOM INC Priority Medium  
 \*Buyer IBOWMAN Irene Bowman (580) \*Dispatch Method Print   
 PO Reference Online Src From Req 0900019676

Header Details Activity Summary  
 PO Defaults Add Comments  
 PO Activities Add Ship To Comments  
 Requisitions Document Status  
 Actions

**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

**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  \*Go to ... More ...

Select 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	0000000000000000000000007507	1	4		2

View Printable Version View Approvals  \*Go to ... More ...

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.