State of Oklahoma
COR130

Release of Statewide Contracts Manual

Office of Management & Enterprise Services

OKLAHOMA

Table of Contents

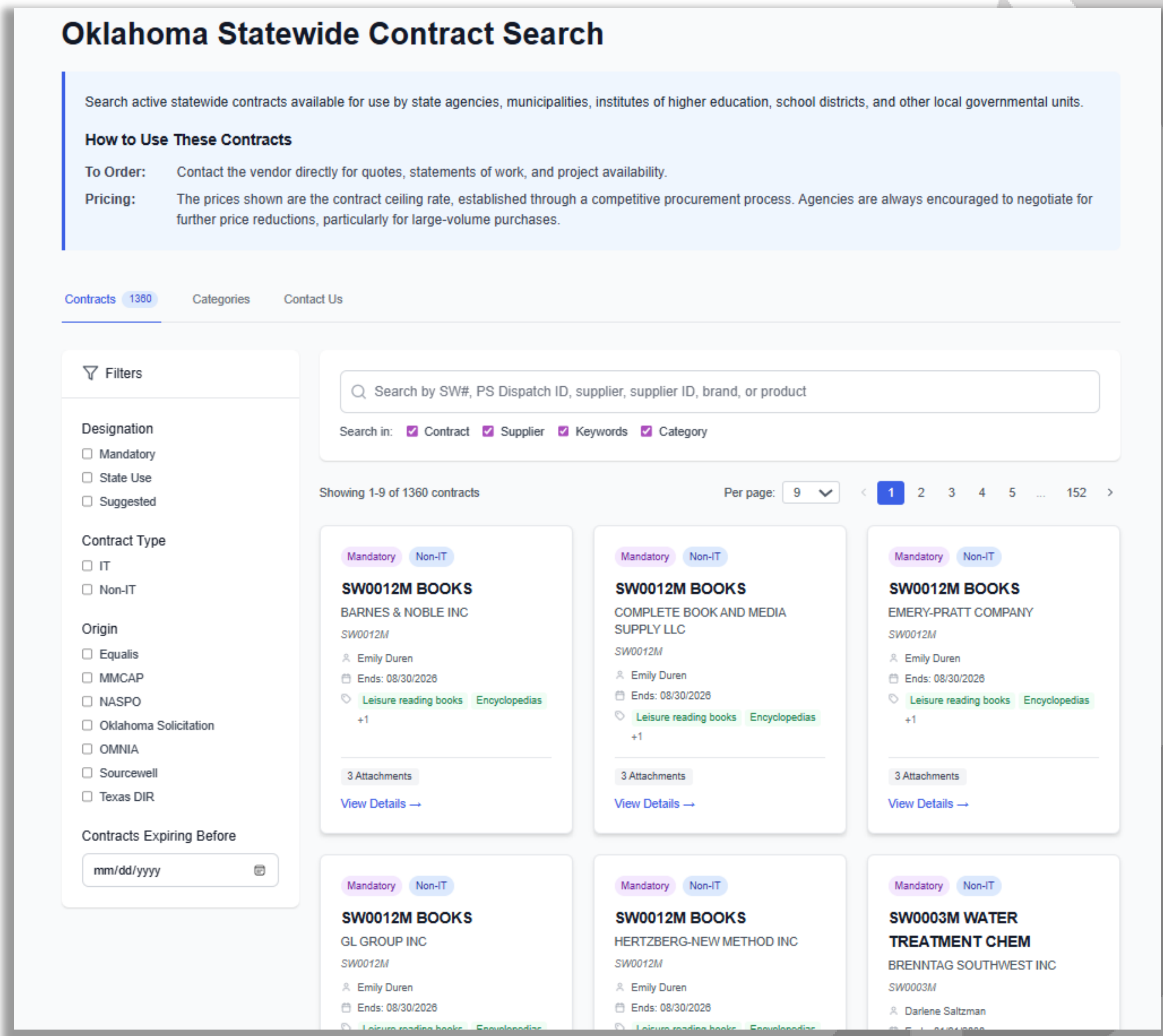
Document History

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

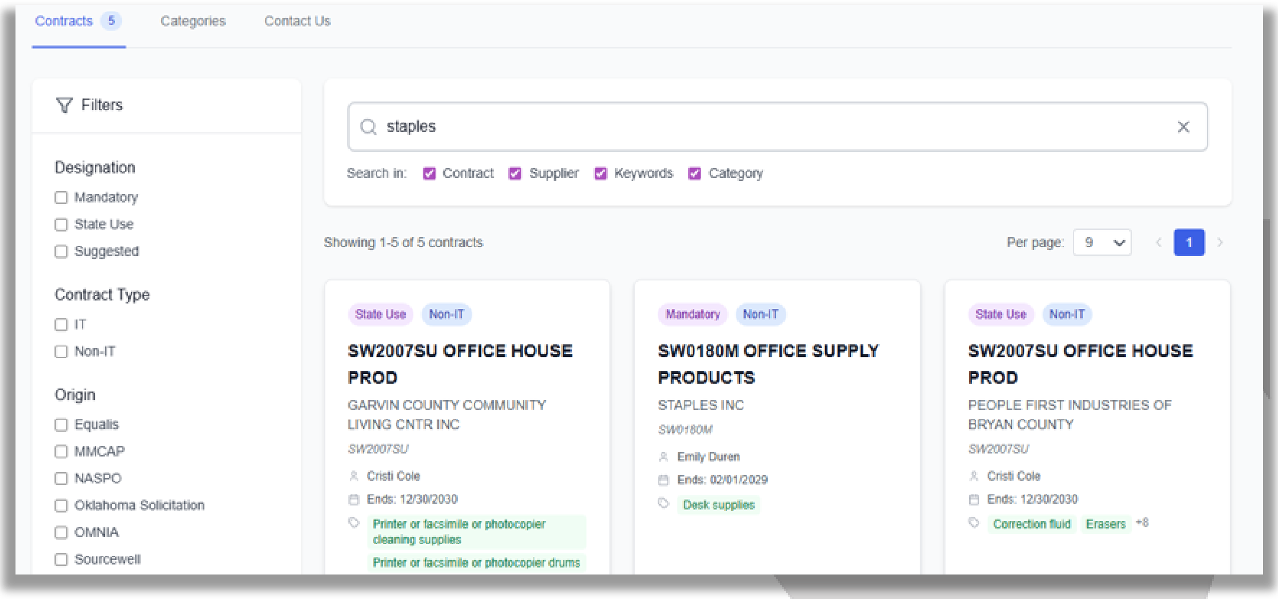
Overview

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



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…).



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

SW0180M OFFICE SUPPLY PRODUCTS

Mandatory Non-IT Sourcewell

Statewide Number: SW0180M
PeopleSoft Dispatch Contract ID: 0000000000000000000008175
Contract Supplier Type: **Direct**

Summary

Ordering Instructions:
To receive discounted pricing offered through SW0180 and for purchases to be compliant under the statewide contract, you must utilize the state's online Staples Advantage dashboard at staplesadvantage.com. To request a login, please use the link below to complete the digital request form:

https://register.staplesadvantage.com/doRegister?RegFormId=BwcEoo
For any questions or issues with items mentioned above please contact supportsa@staples.com or call 877-826-7755.

This Office Supply Products Contract establishes the terms under which the supplier will provide a wide range of office supplies necessary for daily operations. The supplier is responsible for supplying high-quality products, maintaining consistent inventory availability, and ensuring timely delivery of items such as paper goods, writing instruments, filing materials, desk accessories, printer supplies, organizational tools, and other general office essentials.

Contacts

OMES

Category Manager: **Emily Duren**
Email: emily.duren@omes.ok.gov

Supplier

Business Name: STAPLES INC

PeopleSoft Supplier ID: 0000067919

Contacts:

Olivia Malik Primary
Email: olivia.malik@staples.com
Phone: 414-216-6031

Timing

Awarded Supplier Contract Date	Statewide Contract End Date
8/19/2025	2/1/2029

Attachments (3)

- SW0180M_Staples_-MasterAgreement_20251030_v1.0.pdf
  Master Agreement
- SW0180M_Staples_PeopleSoftDispatch_20251015_v1.0.pdf
  PeopleSoft Dispatch
- SW0180M_Staples_ParticipatingAddendum_20251015_v1.0.docx
  Addendum

UNSPSC Categories

44121600 - Desk supplies

Keywords

Office Supplies

Attachment links can be **selected** to view more information.

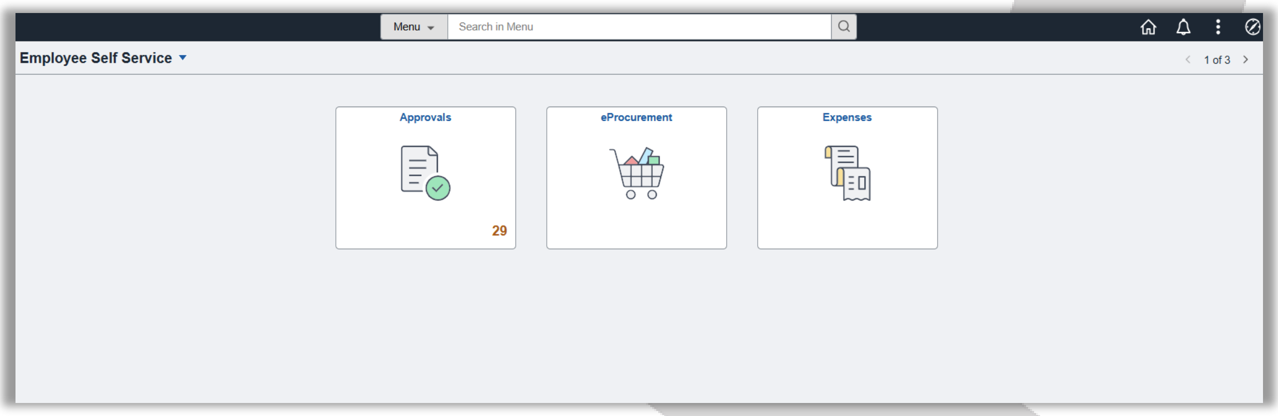
Releasing of Contracts from Requisitions

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.

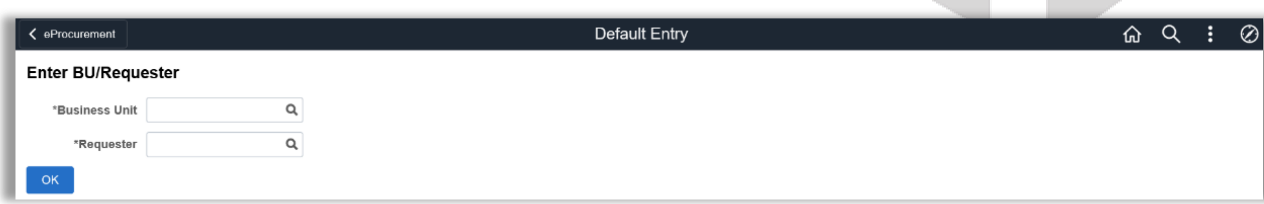
Create a Requisition

Navigation: eProcurement Tile > Create Requisition Tile

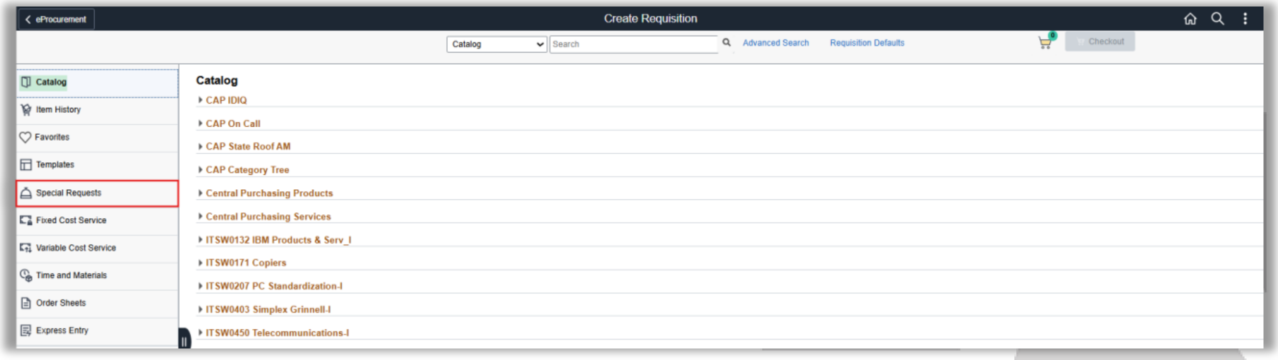


From the Home Page, **select** the eProcurement tile.

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.

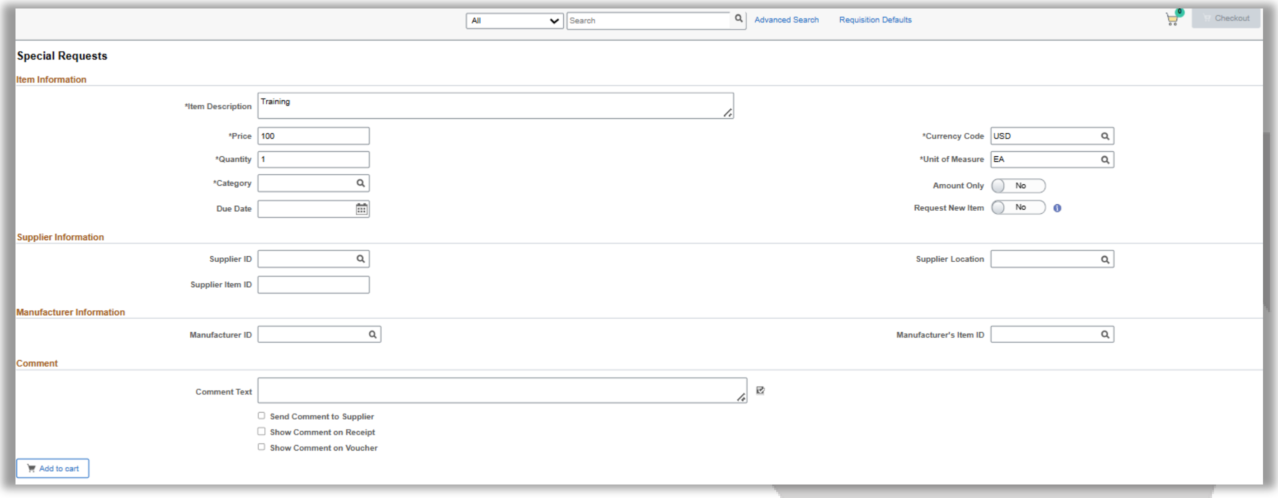


The Create Requisition page is displayed. From this page, the user can select the method of requisition creation from the tiles on the left. The most commonly used method of requisition creation for Release of Statewide Contracts is **"Special Requests."**

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**.

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**.

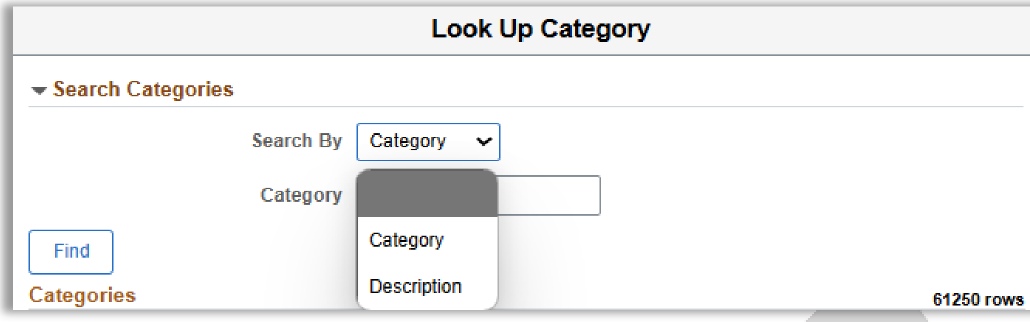
- Use the looking glass icon to select from the UOM list provided.

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 or use the looking glass to search.

Select the **looking glass icon** in the **Category** field.

Look Up Category



The Look Up Category page displays.

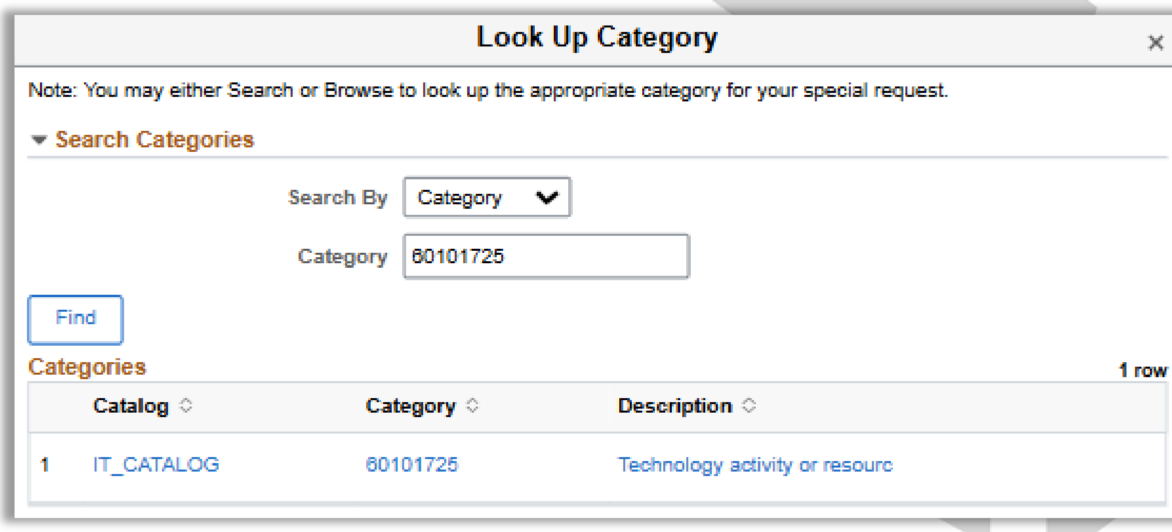
The user can search for a Category by the Category Code or by Description.

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.

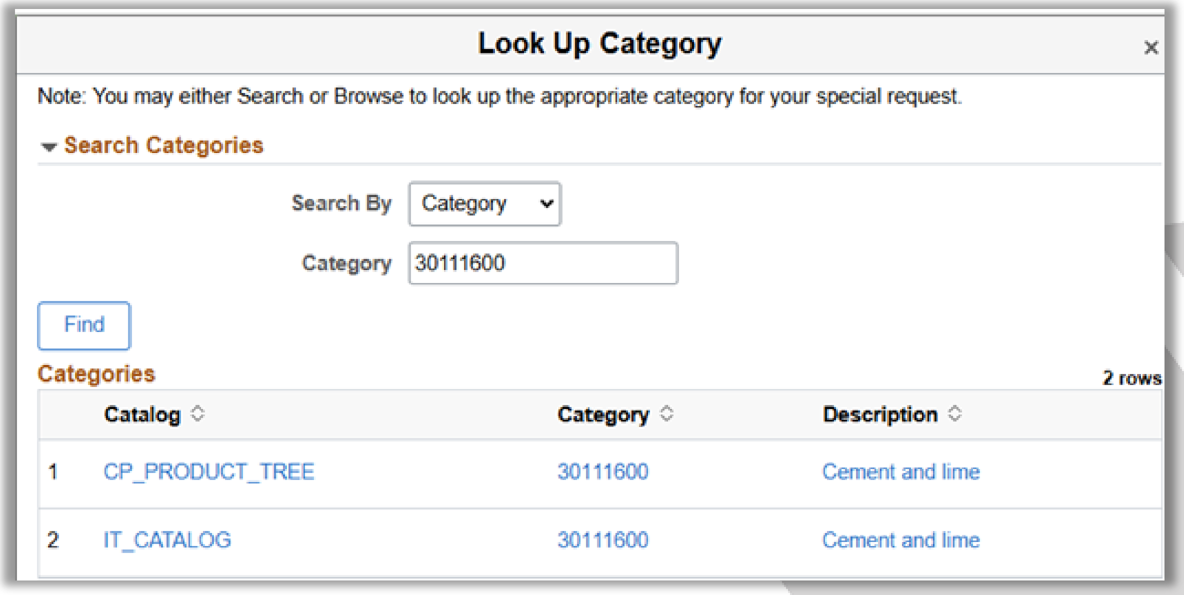
Select the **Find** button to drill down and find the 8-digit number.

- The category code is used for tracking detailed spend information. Use the entire 8-digit number when selected for the requisition.



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.

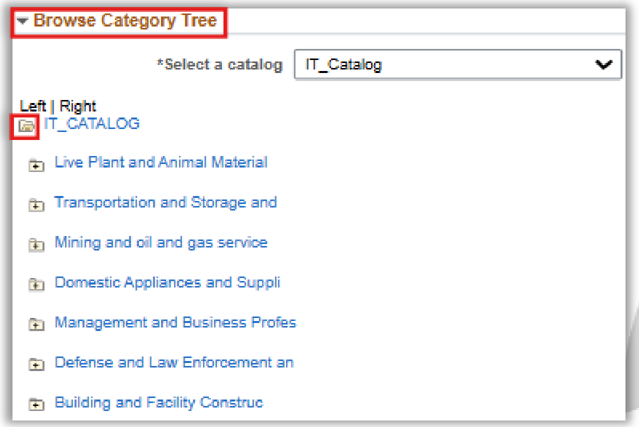


Alternatively, the user can utilize the Browse Category Tree section to drill into catalogs and find the appropriate Category.

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.

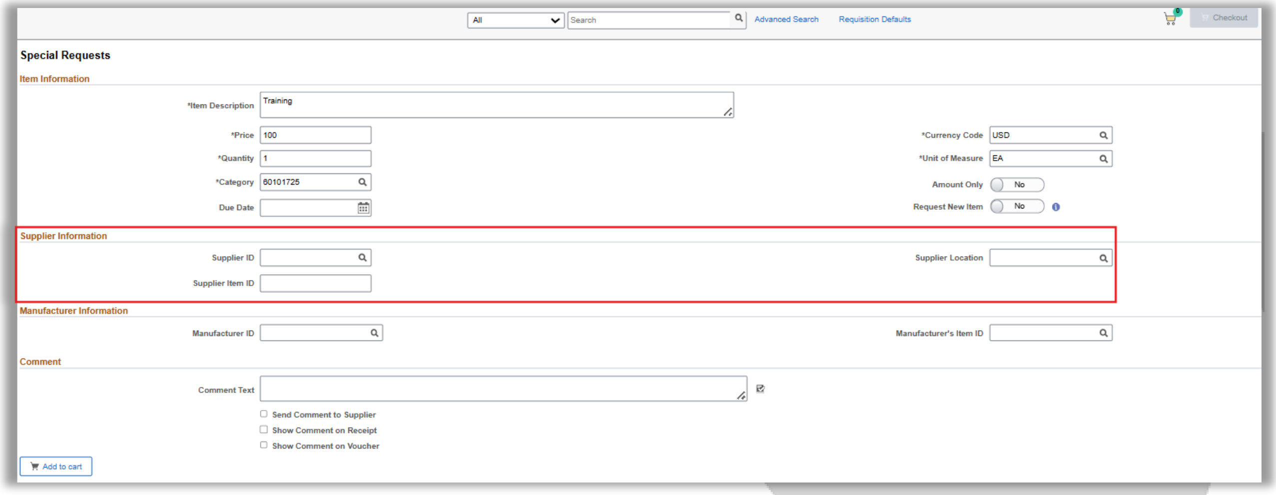
NOTE: The Browse Category Tree section appears collapsed initially. **Select** the Arrow to the left of the Header or **select** the Header itself, outlined below, to expand the section.



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.

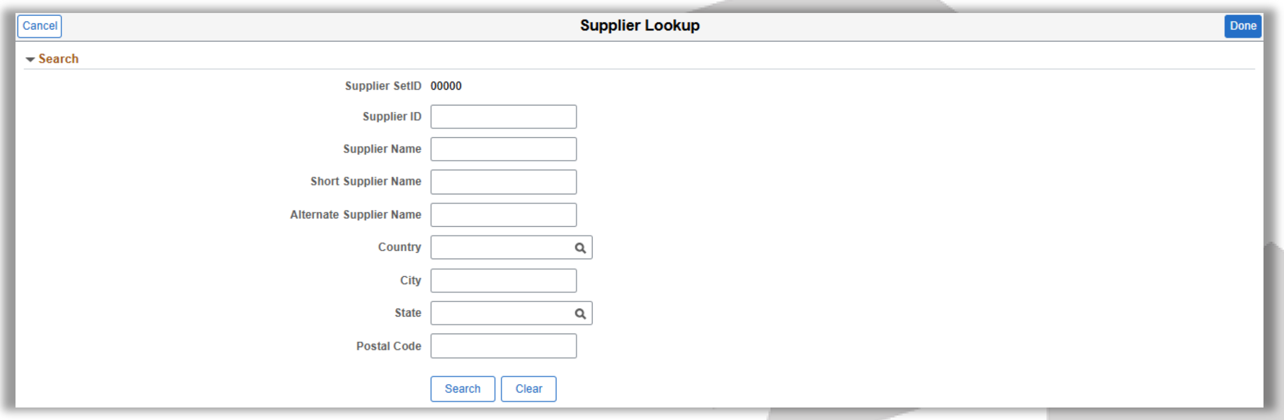
Supplier Information



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.



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

Select the **Search** button.

Search Results

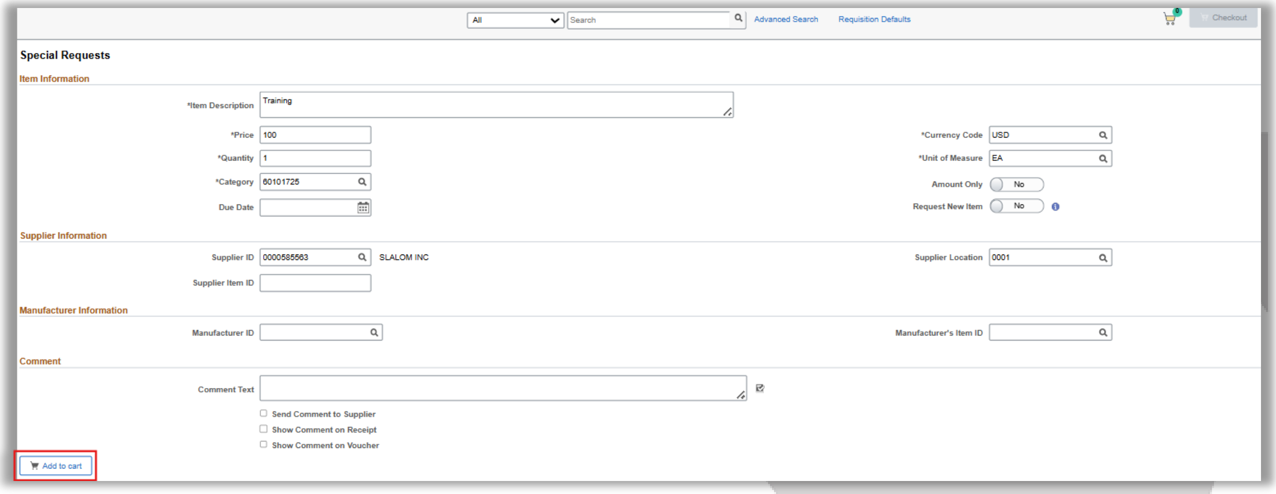
1 row

Supplier ID	Supplier Name	Short Supplier Name	Default Location	Address Line 1	City	State	Postal Code
0000585563	SLALOM INC	SLALOM INC-001	0001	PO BOX 101416	PASADENA	CA	91189-0025

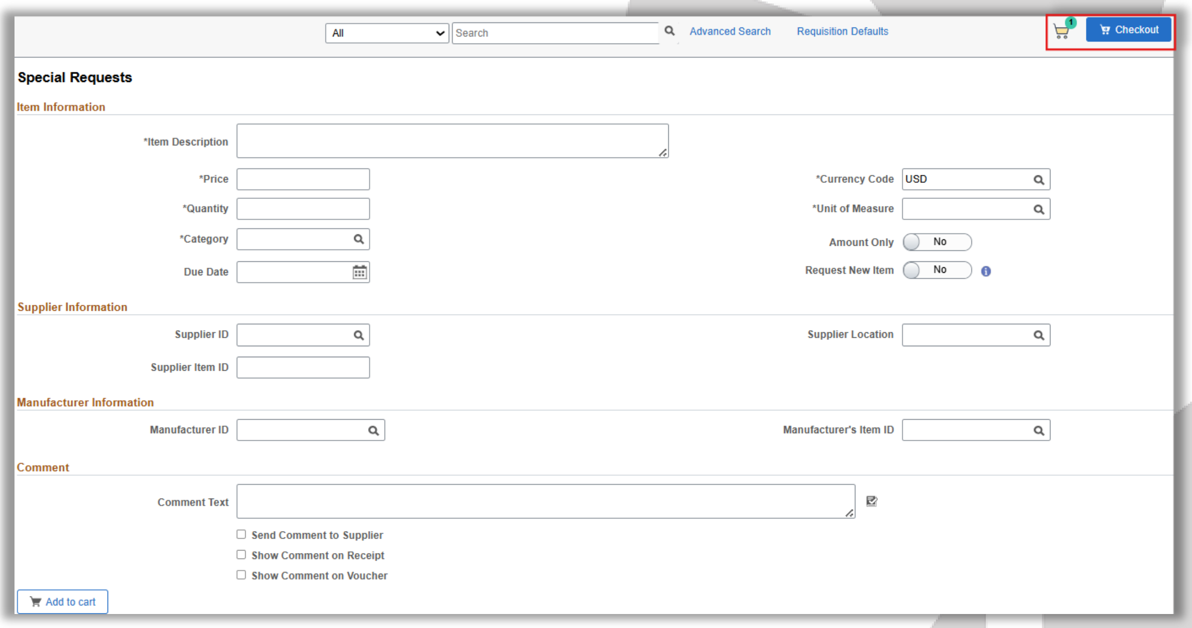
NOTE: There may be several options listed under Search Results to choose from. Look at the Default Location, Address, City or State to help determine the correct Supplier selection.

Select the appropriate supplier. The Supplier information will default onto the Special Requests page.

Add to Cart and Checkout



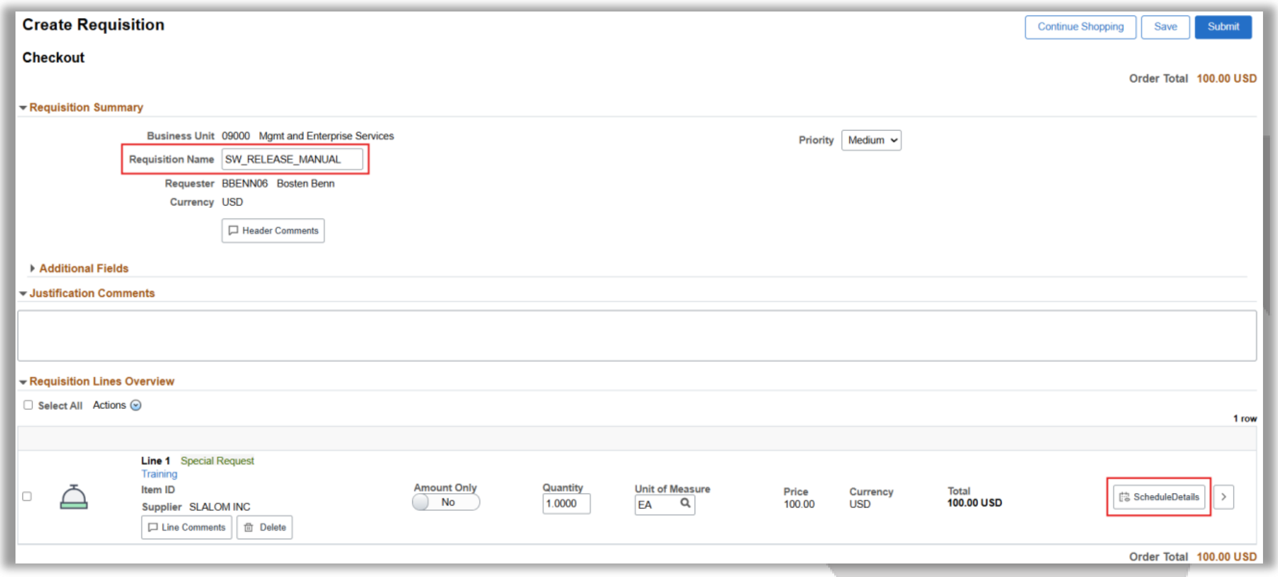
After the line is completed, select the **Add to Cart** button at bottom left of page to save the line and refresh to a blank page.



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



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.

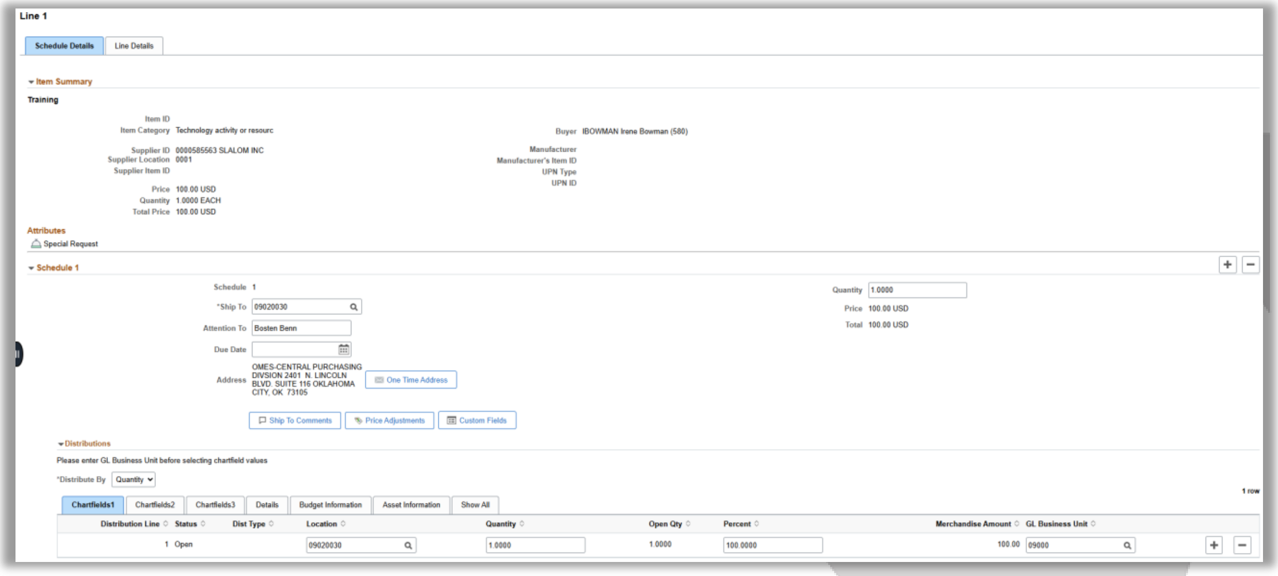
Enter a **Requisition Name**:

- **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



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.

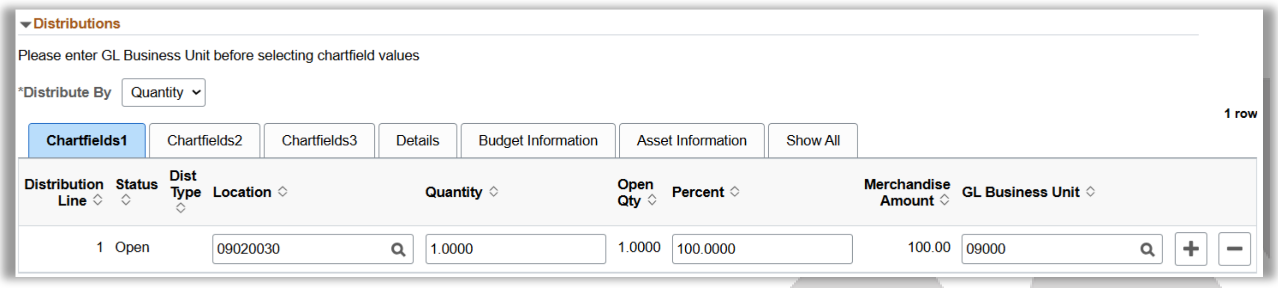
To add another distribution row, select the **Plus (+)** button on the Distribution line.

To delete a schedule/distribution row, select the **Subtract (-)** button on the appropriate line.

The **Chartfield** 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

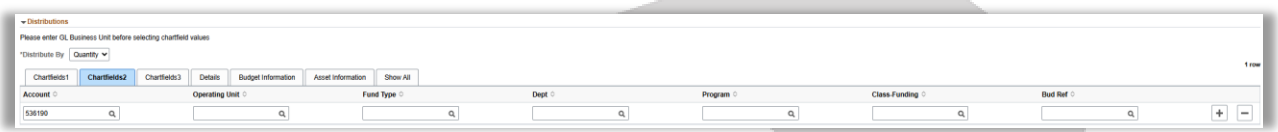


Distribute By: Default value is "Quantity." Can be changed to "Amount", meaning the sum of all distribution amounts must equal the schedule amount.

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.

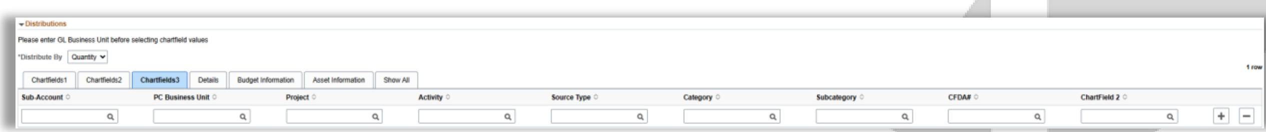
Chartfields 2 Tab



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.

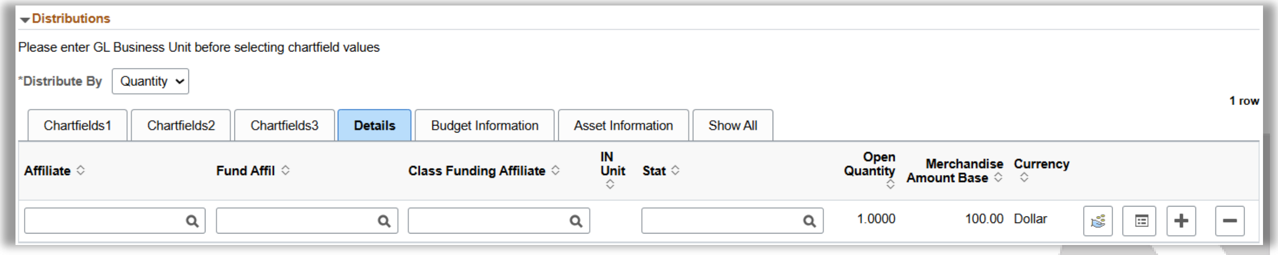
Chartfields 3 Tab



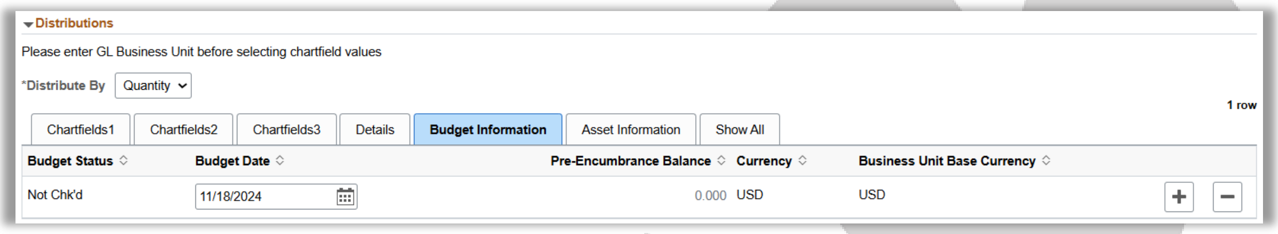
Enter additional funding information in this tab as necessary for agency requirements.

Use the **Chartfield tabs** to define a valid funding string for the Requisition.

Details Tab



Budget Information Tab

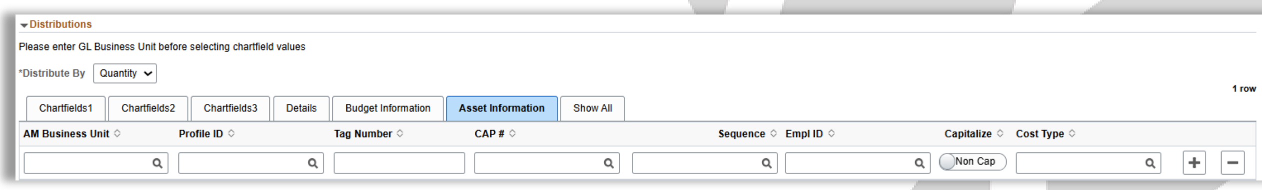


Budget Status: Values are “Valid”, “Error”, and “Not Chk’d”. Budget Values are returned when Budget Checking process is completed.

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.

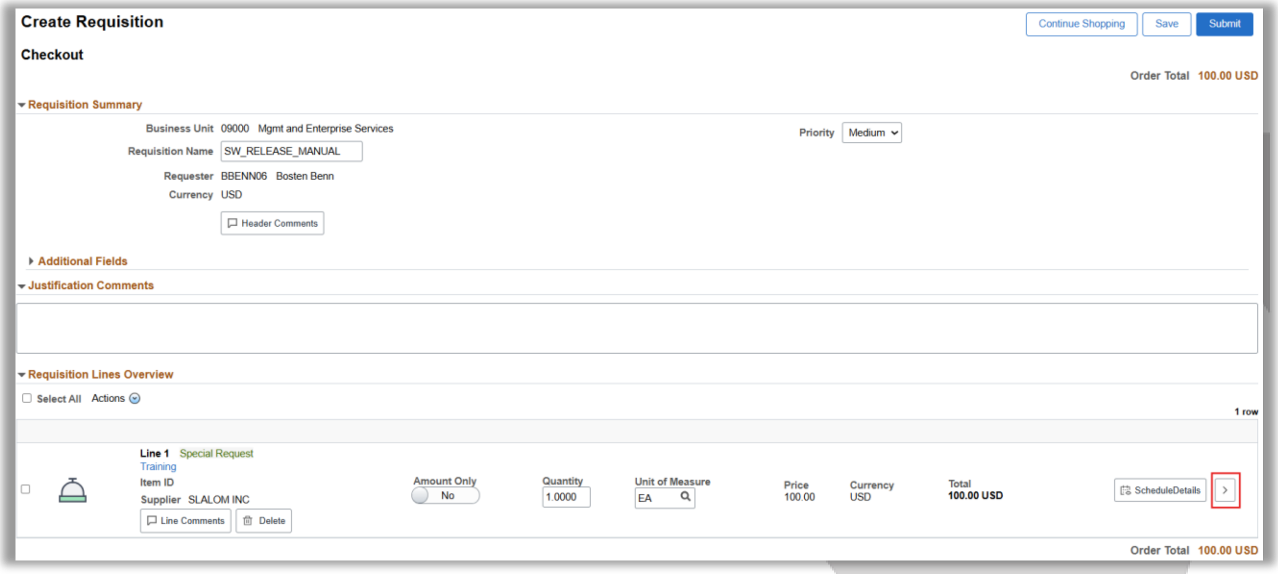
Asset Information Tab

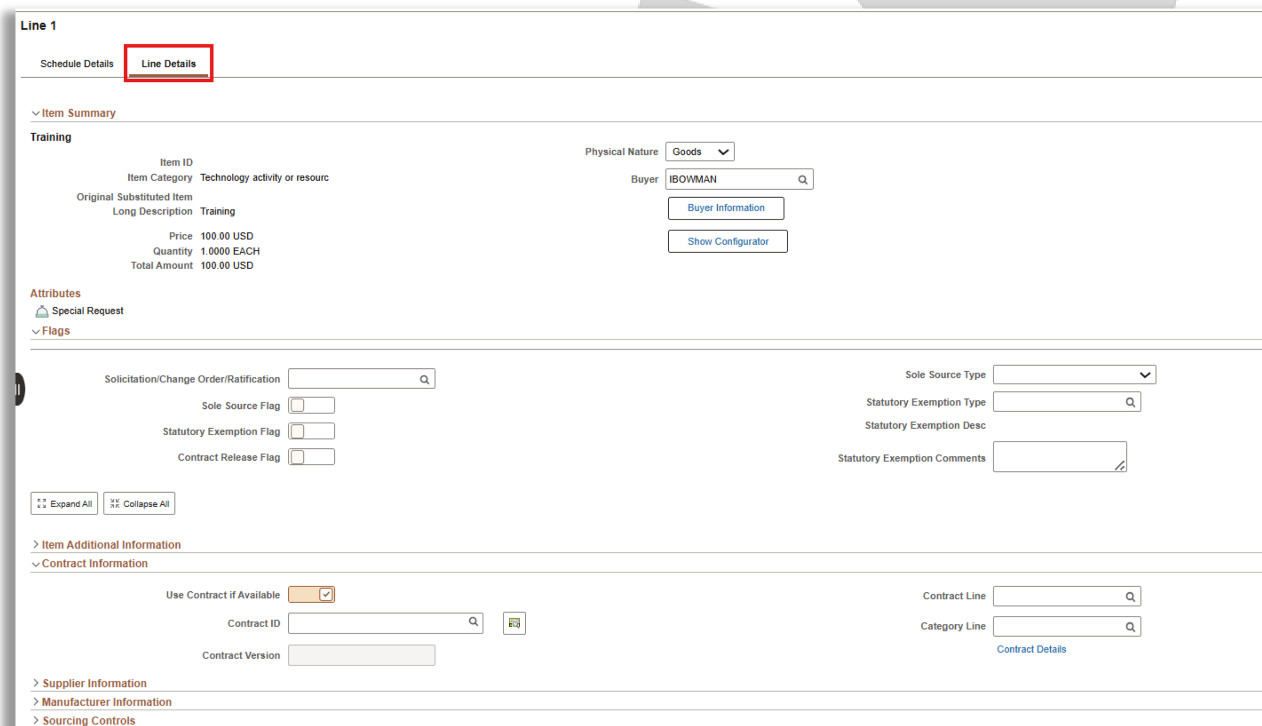


Enter asset information as necessary.

Select the **Done** button to return to the Checkout page.

Line Details Page

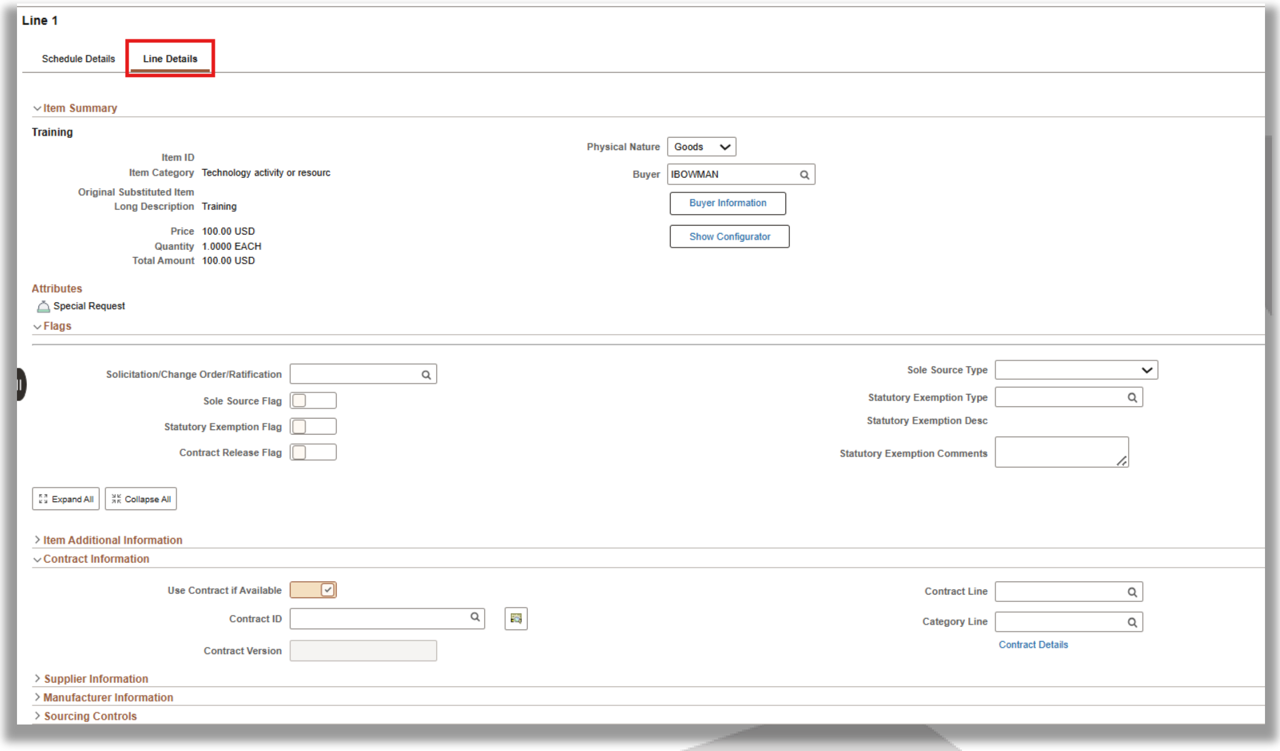




The Line Details page can be accessed in two ways:

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



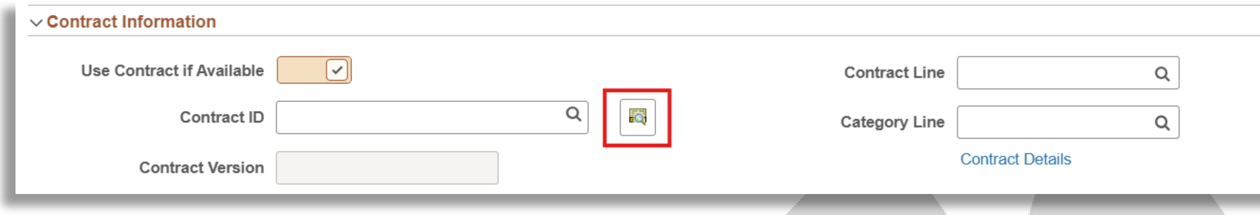
<u>Item Summary:</u>

Physical Nature: Select to indicate whether the object is a physical good or service.

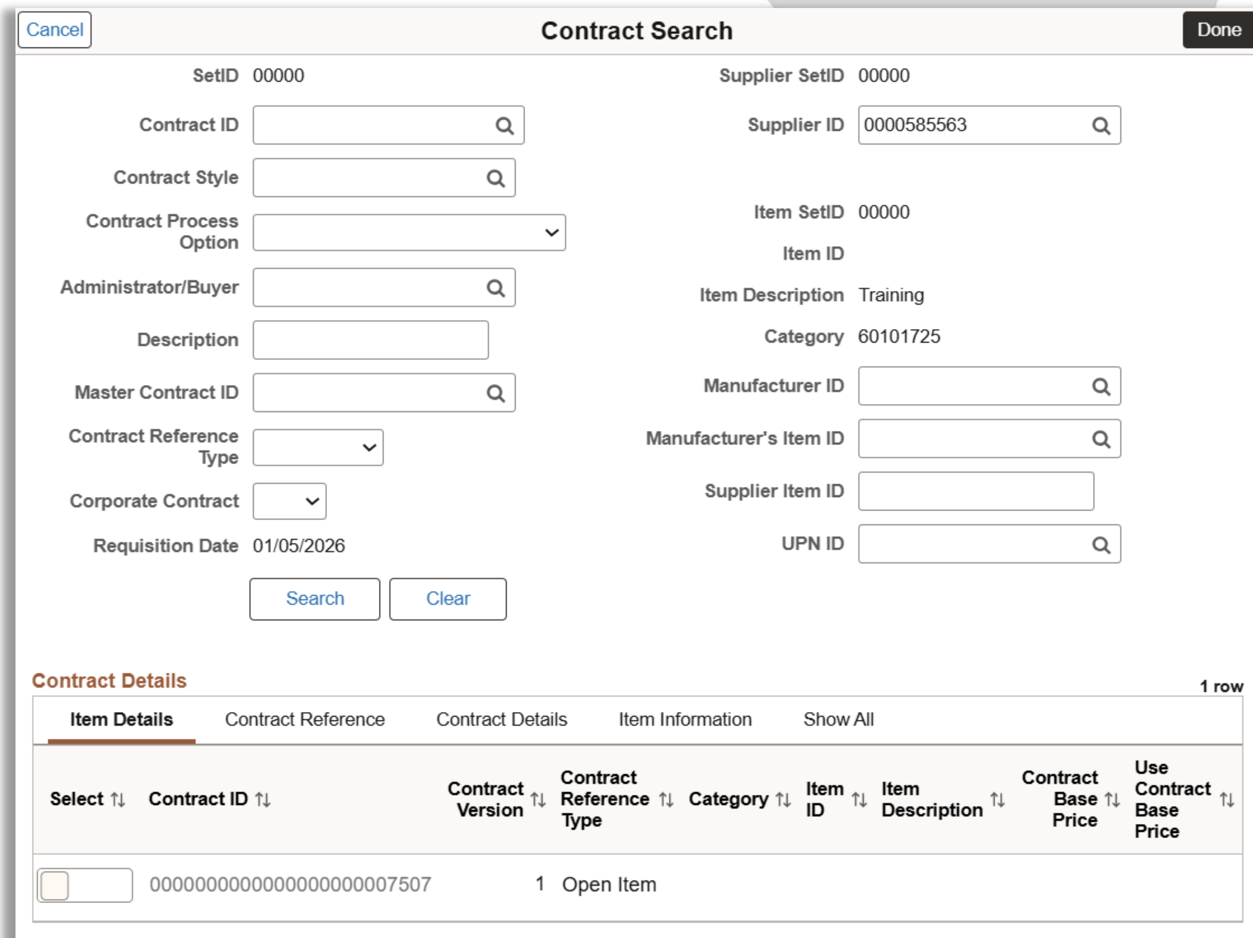
Buyer: Select a buyer for the requisition line. If you select a new value on the requisition that is tied to a different default buyer (item, supplier, or category, for example), the value in this field is overridden with the new default buyer value. The buyer's name appears in the Name field after you select the buyer.

Define Contract Information

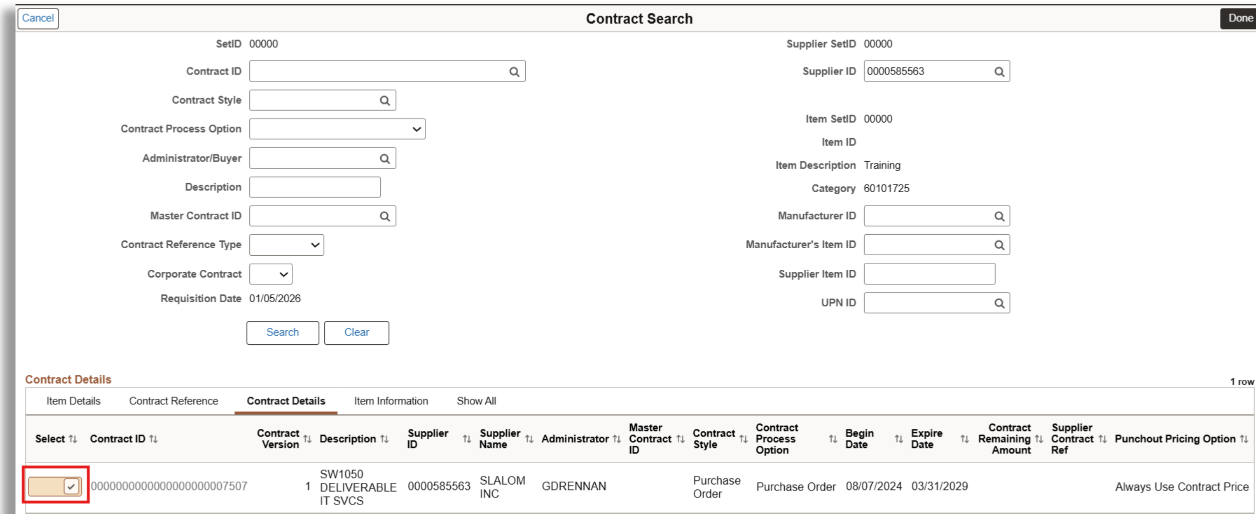
The **Line Details** page allows the user to define additional line details for the Requisition. When releasing a Statewide Contract, the **Contract Information** section must be populated.



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

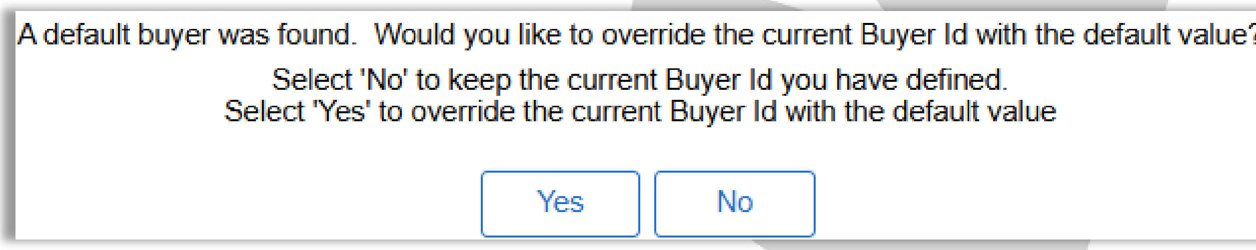


If the Supplier Information was entered when adding the line, the contract will be shown on this page. If not, the user can search for the Contract using the **Contract ID or Description** field.

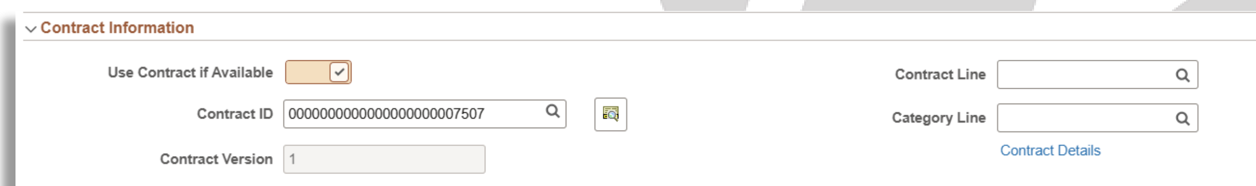


Select the **Select** button in the Contract Details section, outlined above, to attach the contract to the Requisition.

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

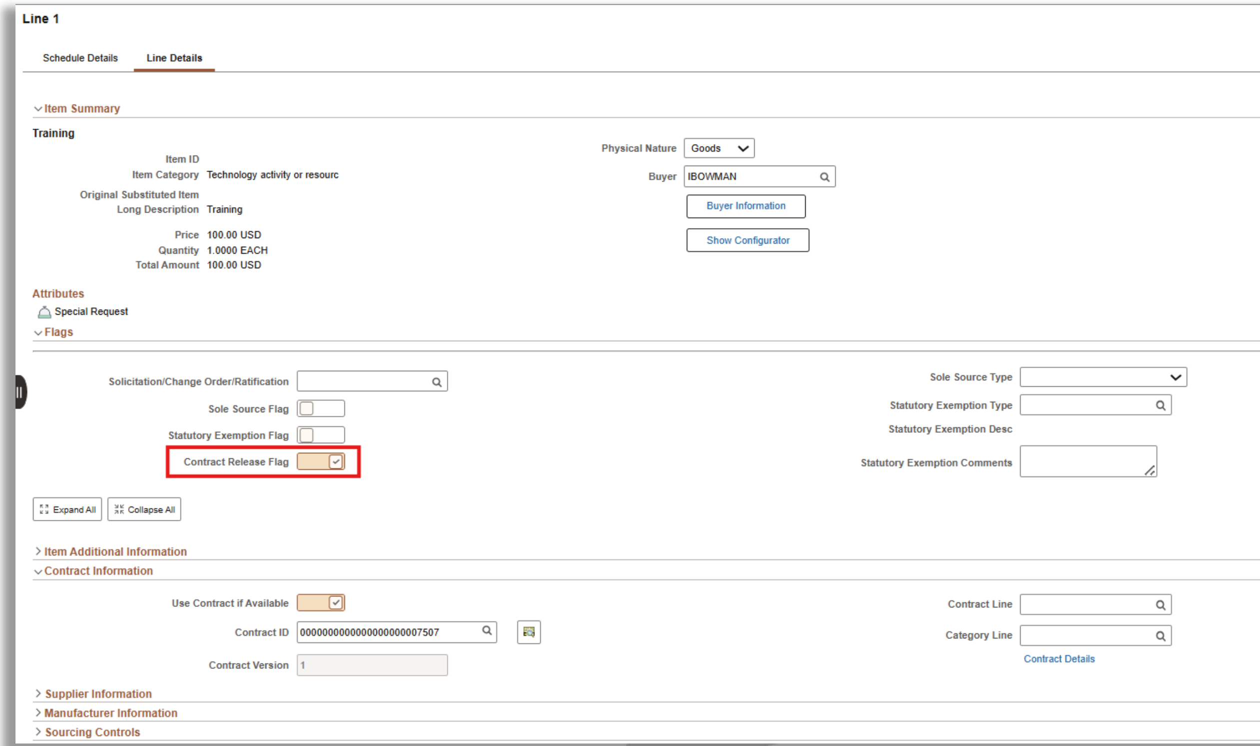


The system may prompt the user to select between the Default Buyer for the Contract or to keep the Buyer entered on the requisition. **Select** the **Yes** button if the user desires to use the Default Buyer.

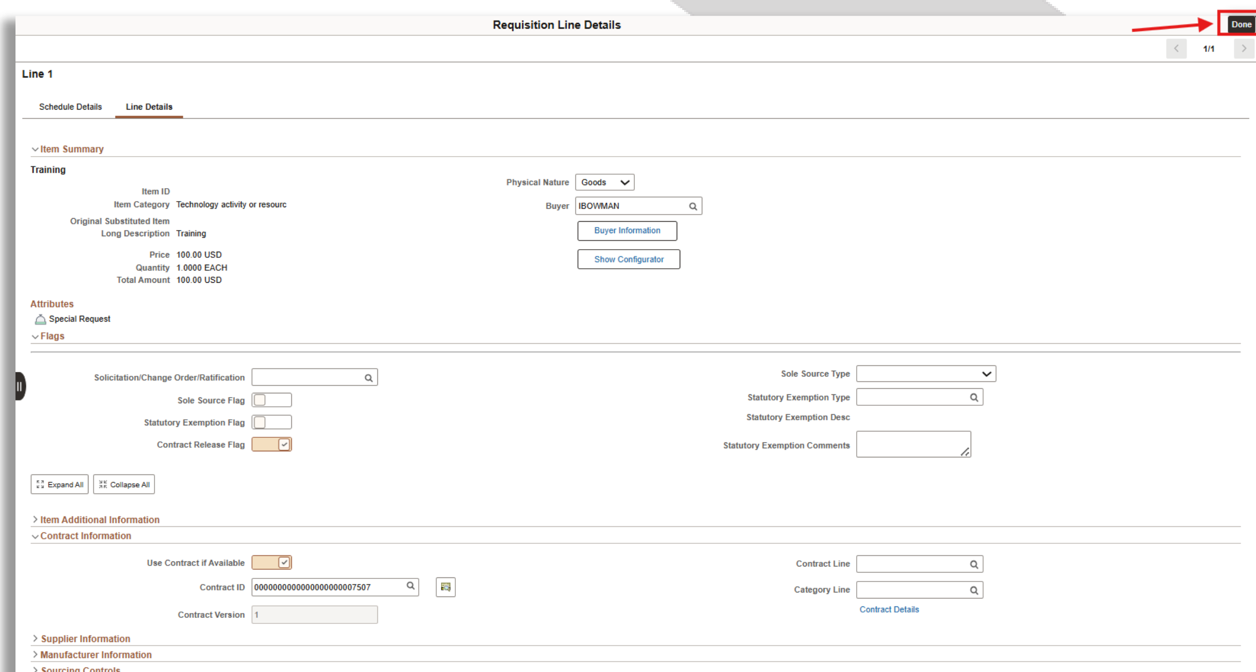


The **Contract Information** section updates with the Contract ID.

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

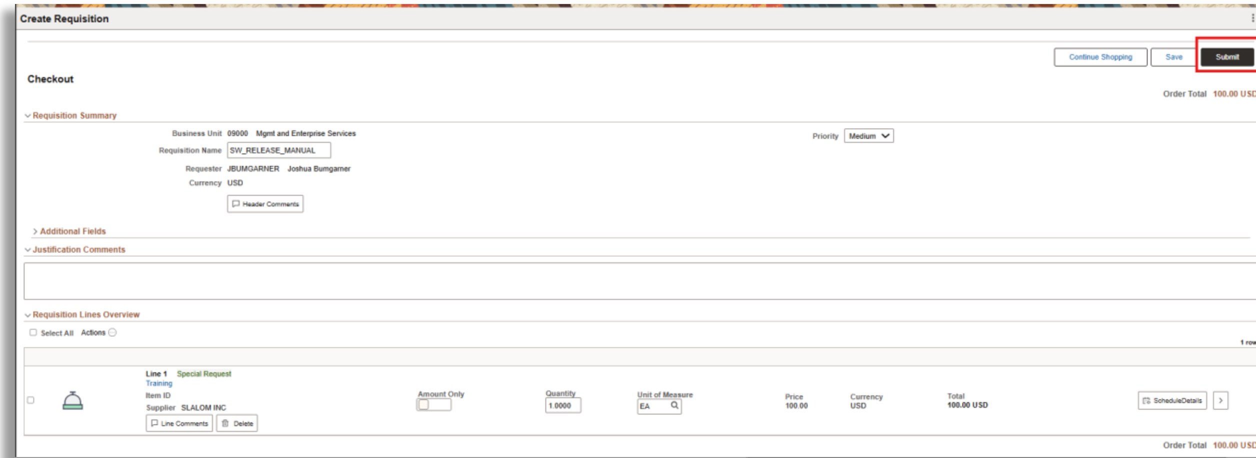


After adding the Contract to the Requisition, the user must selectt the **Contract Release Flag**.

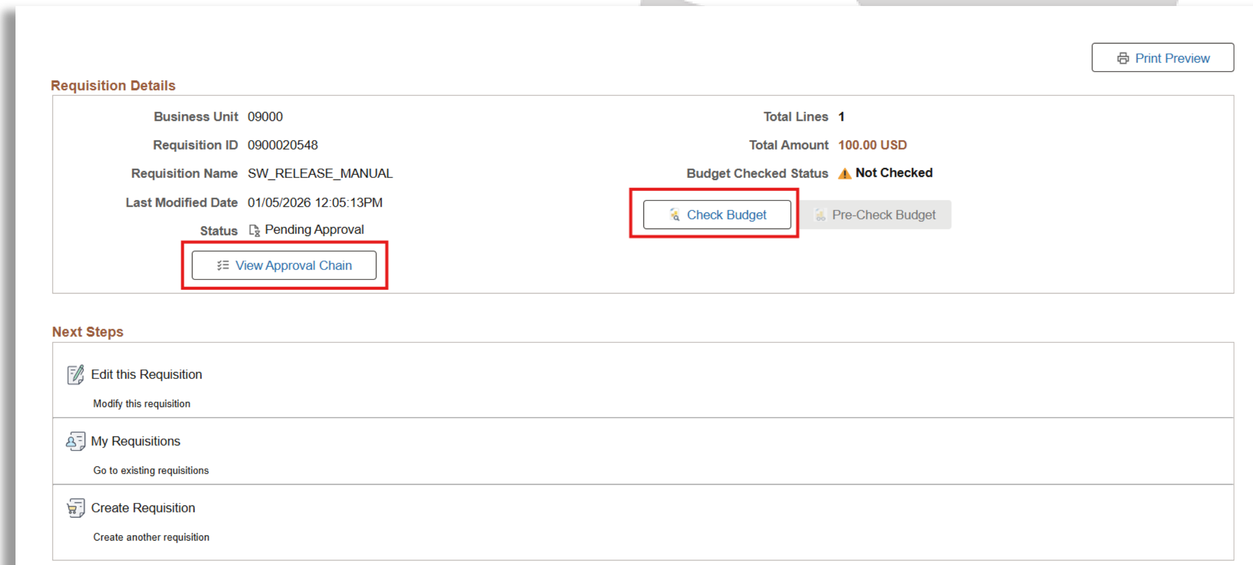


After completing the Schedule/Distribution and Line details for the Requisition, select the **<u>Done</u>** button in the top right of the page.

Submit the Requisition



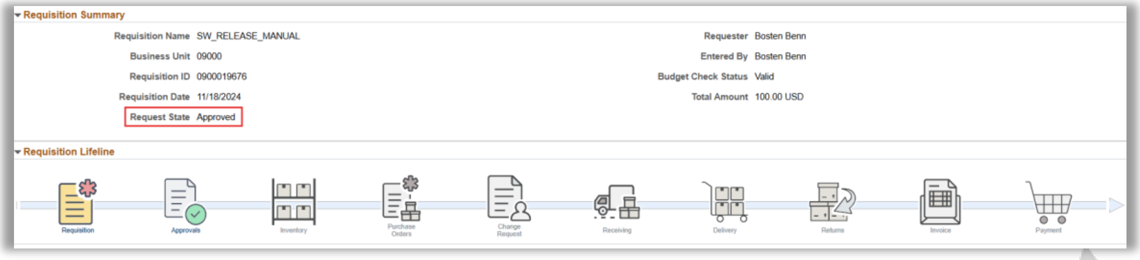
After reviewing the Requisition details, select the **Submit** button in the top right of the page.



Select the **<u>Check Budget</u>** button to initiate the Budget Checking process for the Requisition.

The **<u>View Approval Chain</u>** 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

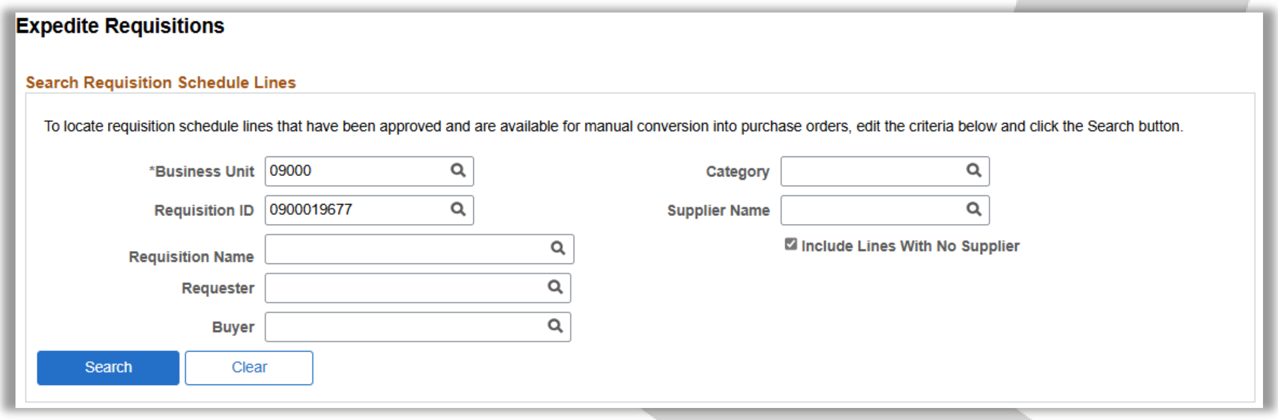
Option 1: Expedite Requisition to Purchase Order

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

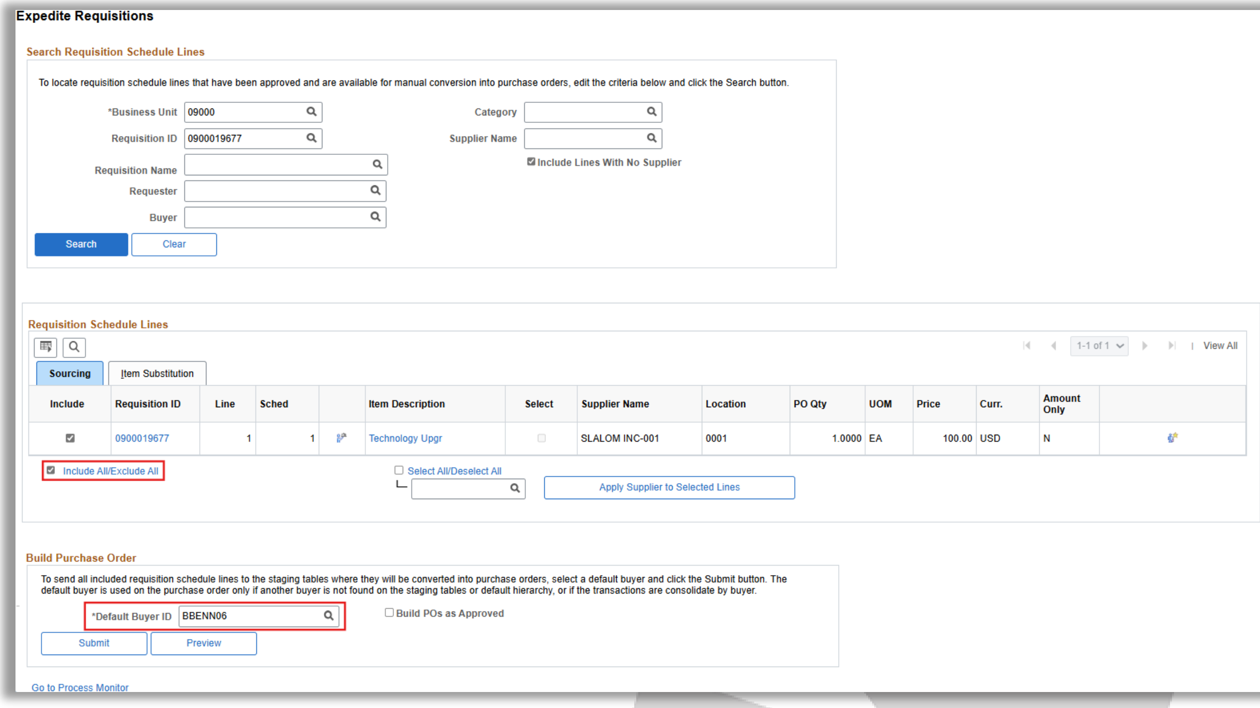
Navigate to the Expedite Requisitions Page using the Compass icon at the top right of the page.

Navigation: Menu > eProcurement > Buyer Center > Expedite Requisitions



Enter the Business Unit and Requisition ID you wish to expedite to a Purchase Order.

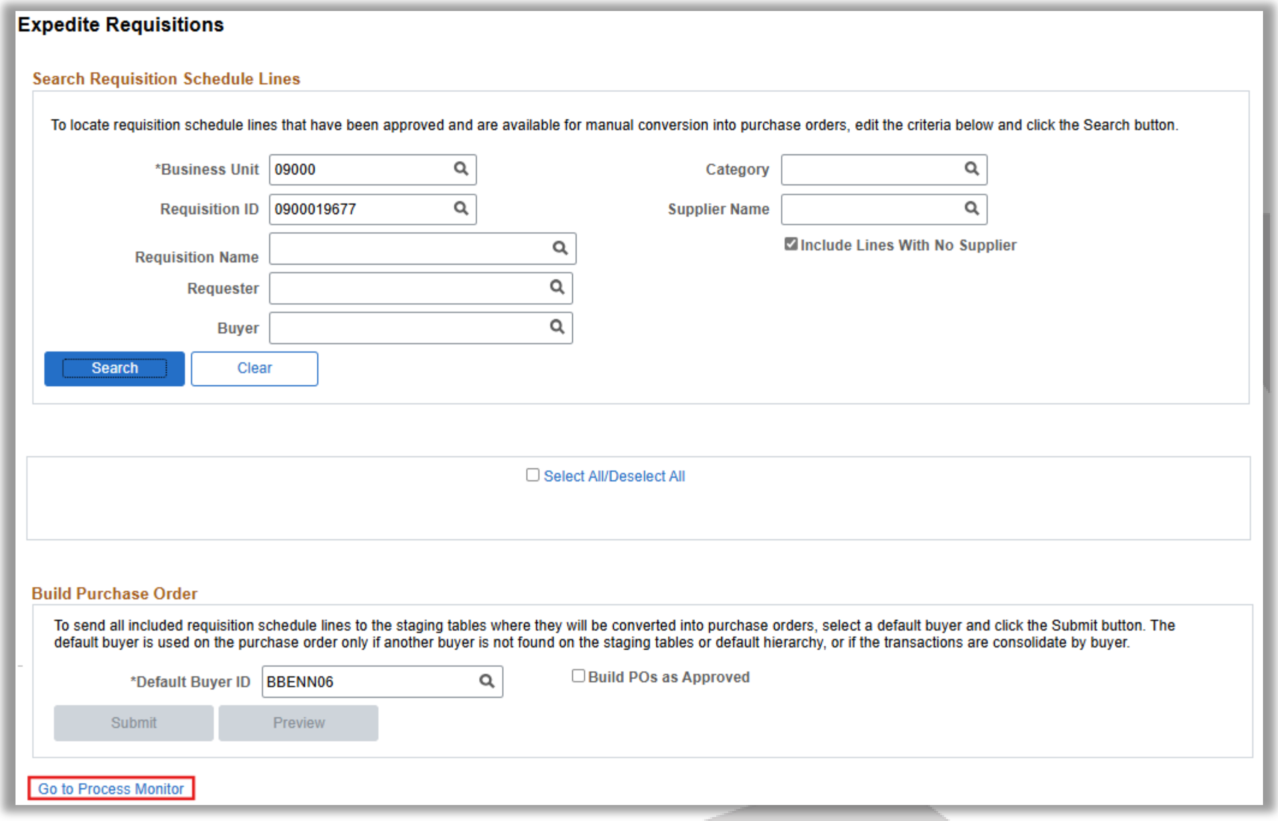
Select the **Search** button.



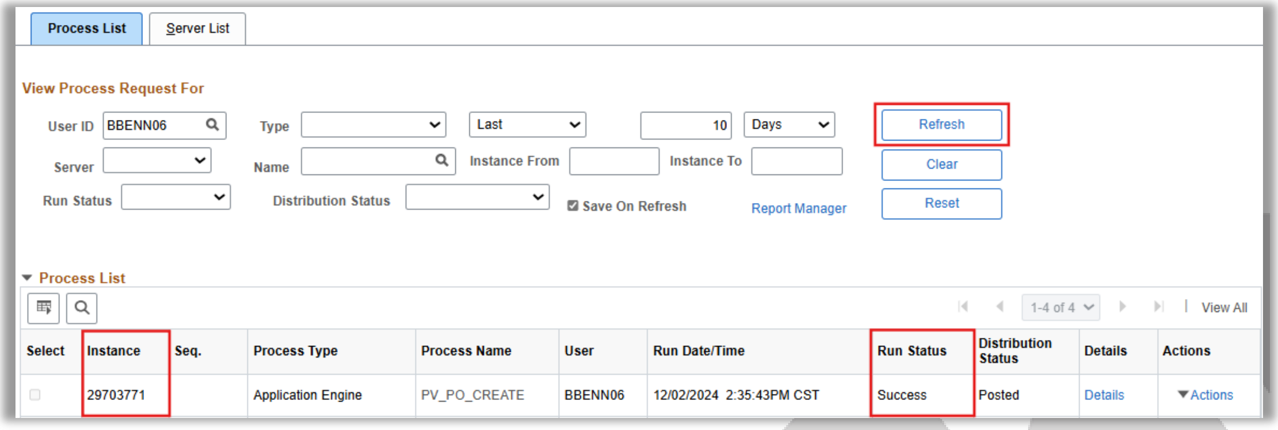
Once the requisition is located, enter the **Buyer** and select the **Include All/Exclude All** checkbox to select all line items (if more than one).

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.



Select the **Go to Process Monitor** hyperlink located under the Build Purchase Order section at the bottom of the page.



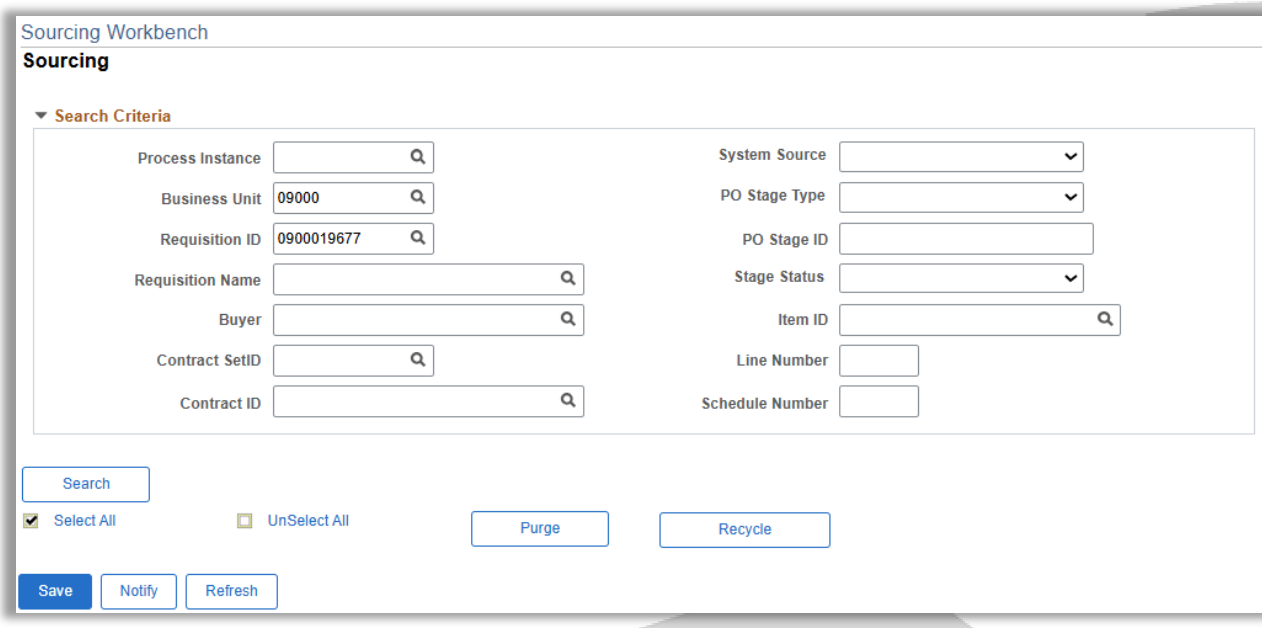
Select the **Refresh** button until the **Run Status** displays as “Success.”

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

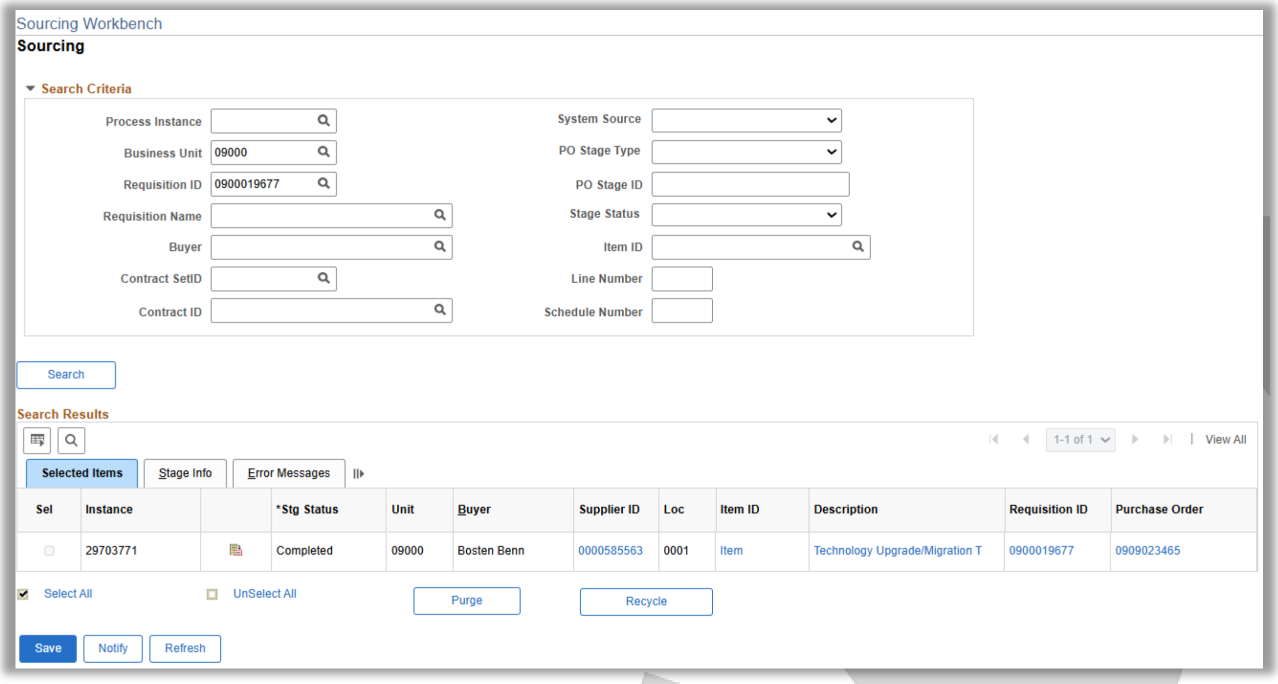


Enter the **Business Unit** and **Requisition ID**

<u>or</u>

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

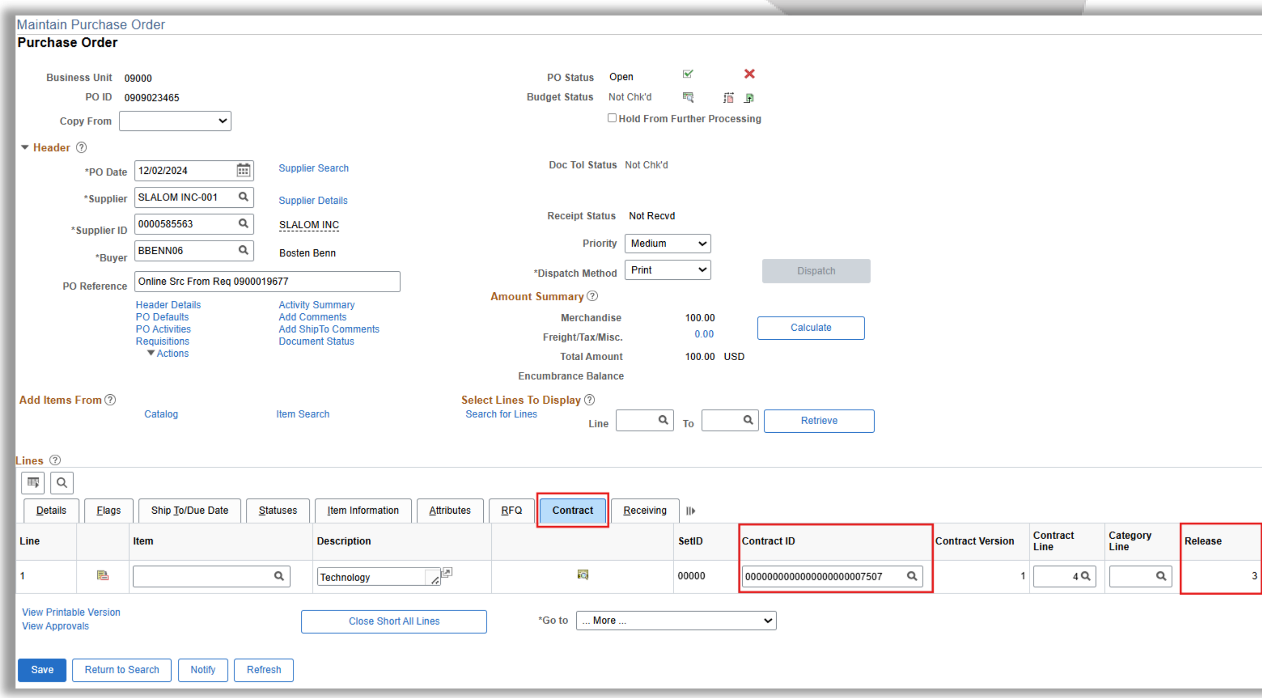
Select the <u>**Search**</u> button.



In the Search Results section, the **Requisition ID** displays along with the **Purchase Order** number.

Make note of the Purchase Order number to edit the PO before dispatching.

Select the **Purchase Order** number hyperlink to view the Purchase Order in a new window.



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.

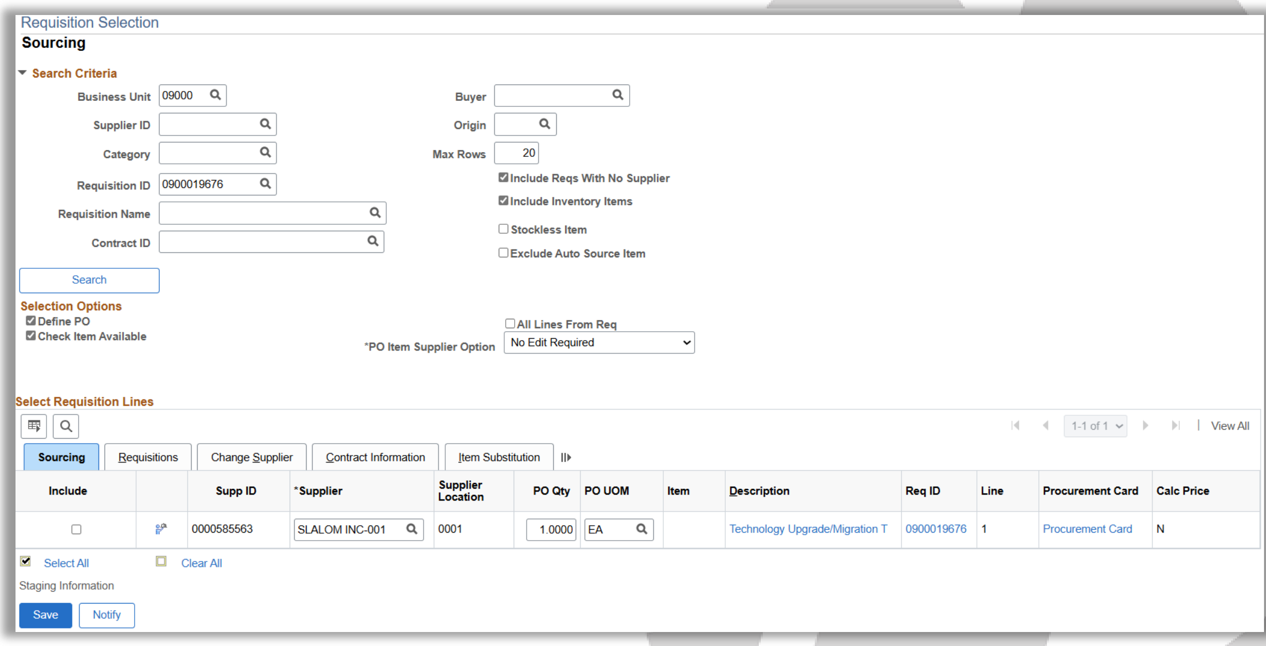
The user will need to Pre Approve, Budget Check, Approve, and Dispatch the Purchase Order in order to use it.

Option 2: Sourcing the Requisition into a Purchase Order

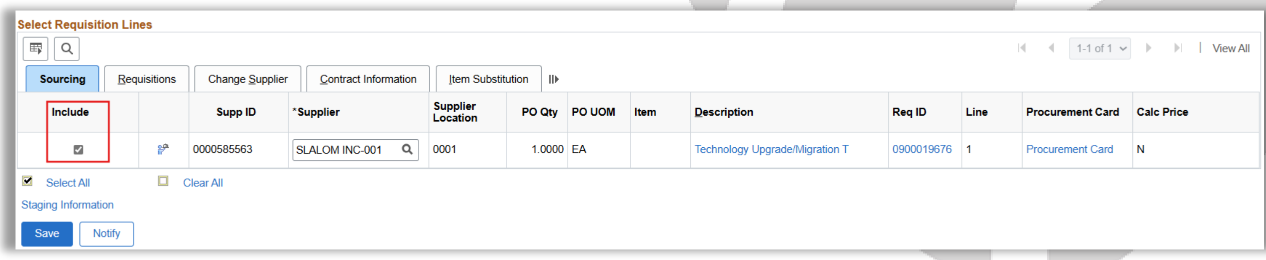
Requisition Selection

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

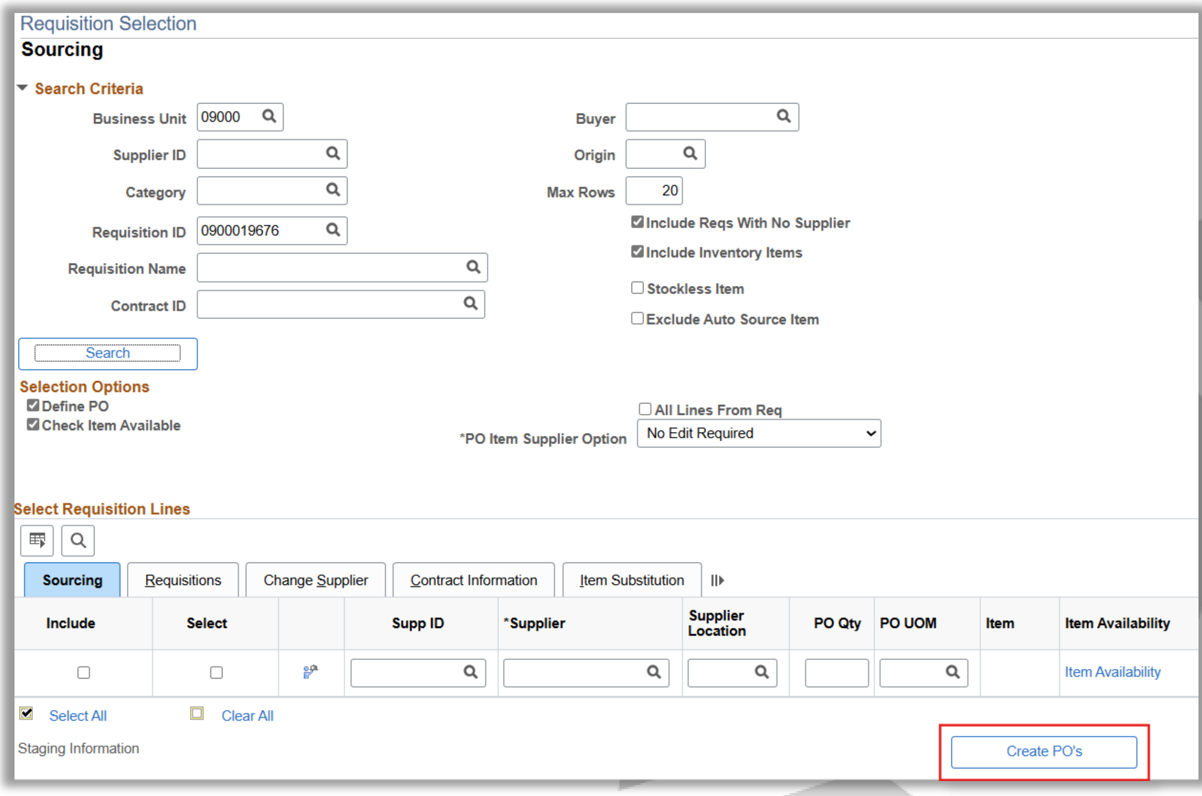


Enter the **Requisition ID** and select the **Search** button to retrieve the Requisition.

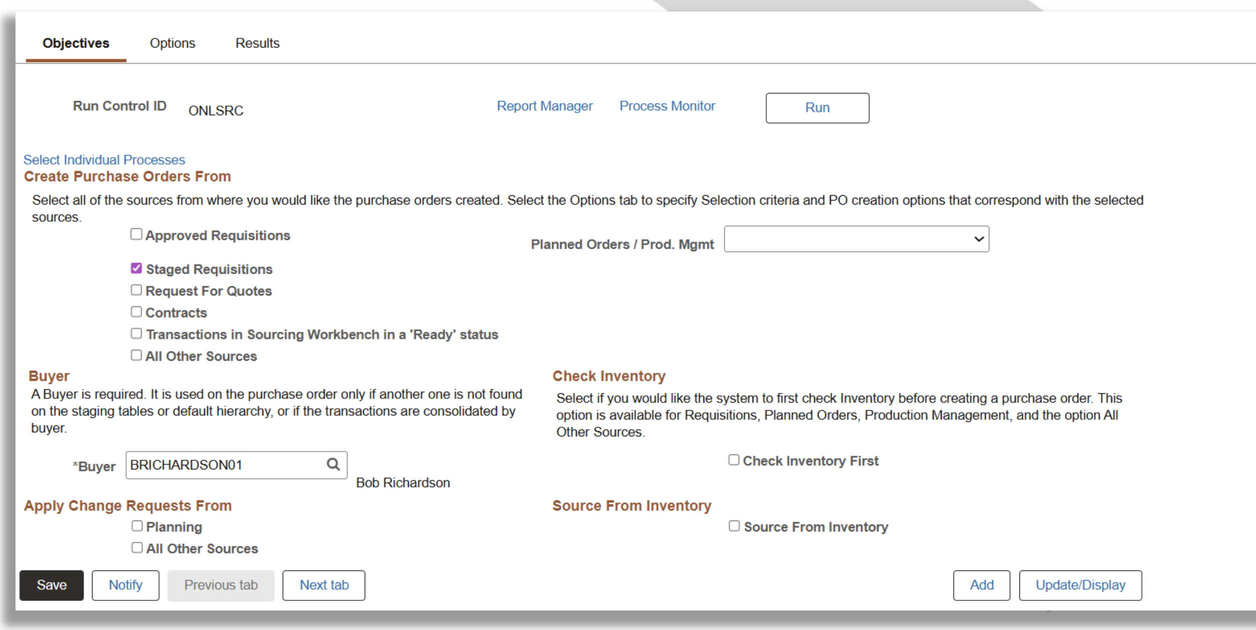


Select the **Include** radio box, outlined above, to select the Requisition for sourcing.

Select the **Save** button.



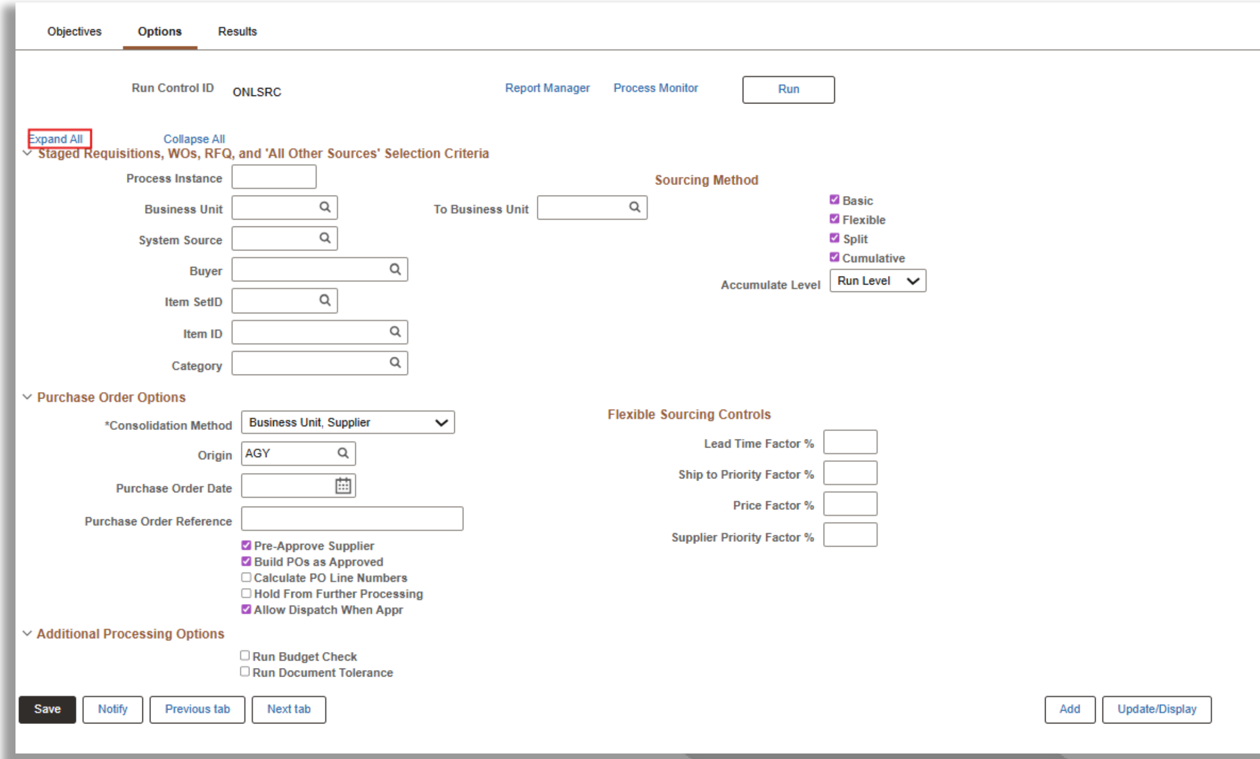
After selecting the **Save** button, select the **Create PO's** button.



Select the "**Staged Requisitions**" checkbox to select all Requisitions that have been staged on the previous page.

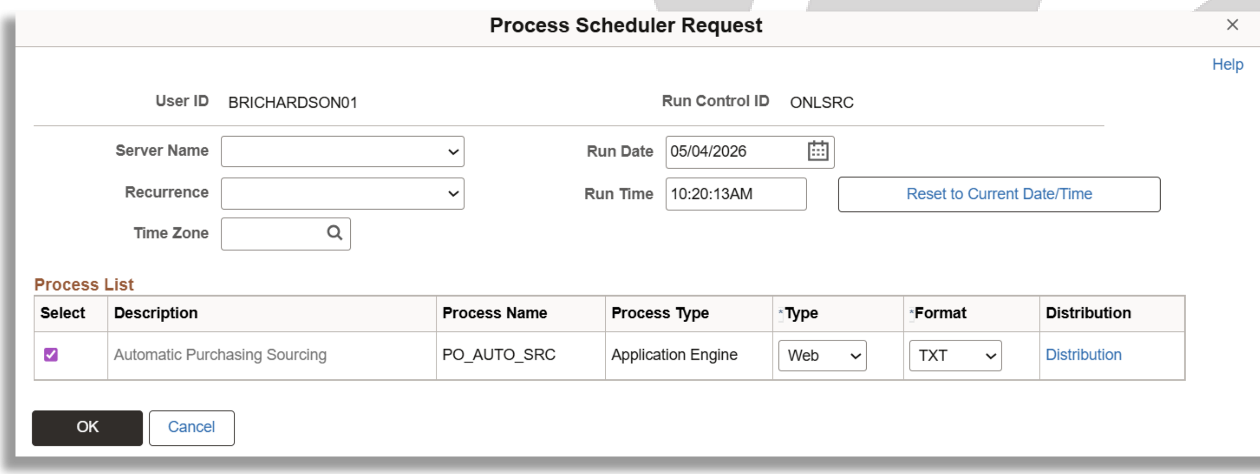
Buyer – Select a buyer to be defined on the purchase order. The system uses this buyer when one is not found through staging tables.

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



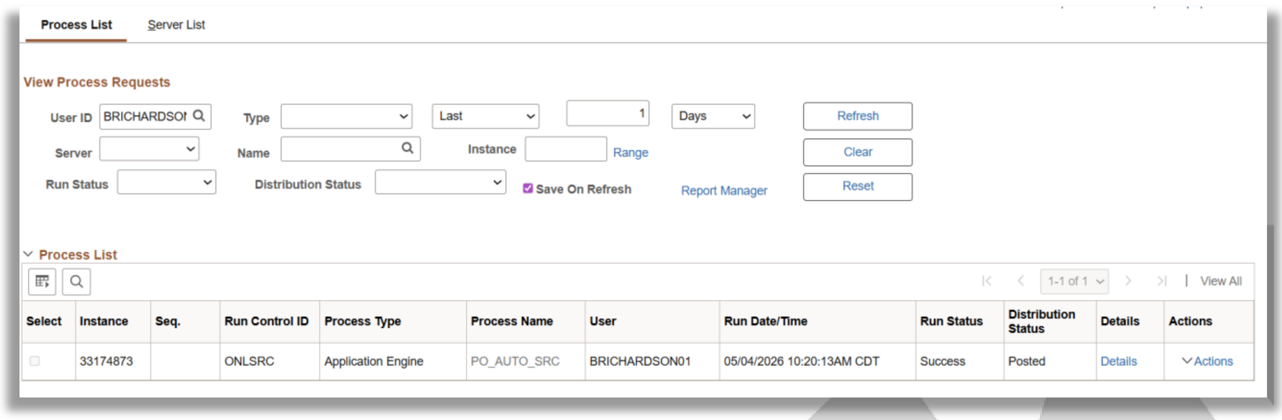
Select the **Expand All** hyperlink to specify selection criteria and purchase order creation options that correspond with the selected sources, if necessary.

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



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

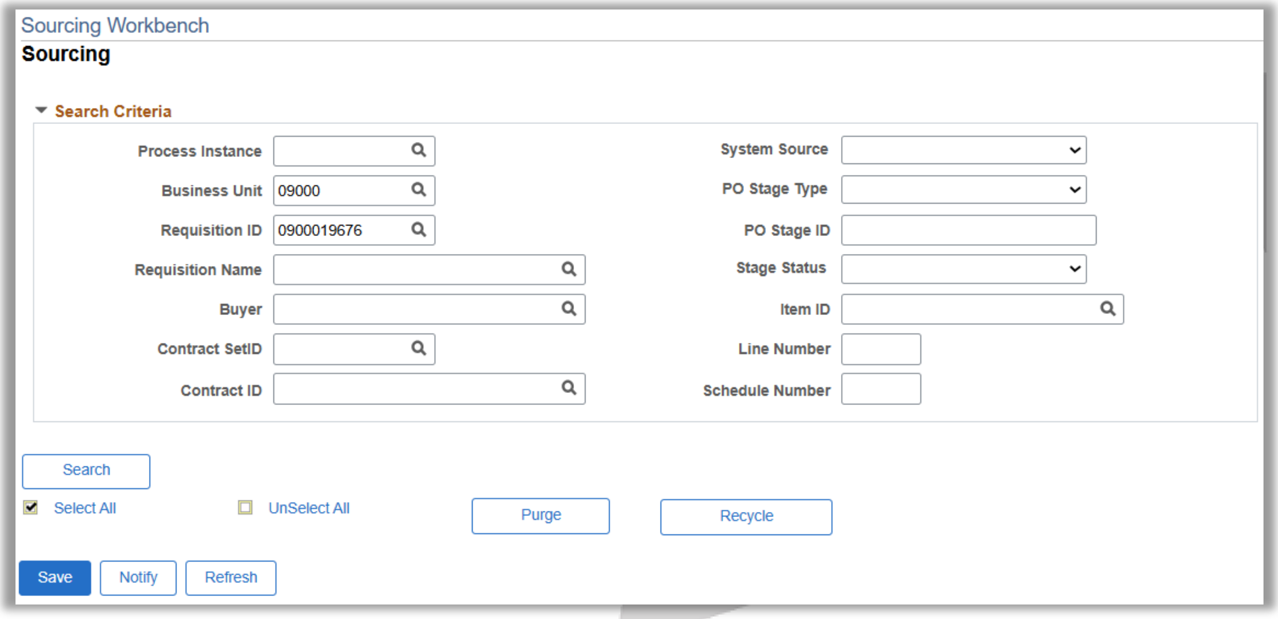
Select the **Process Monitor** hyperlink to view the status.



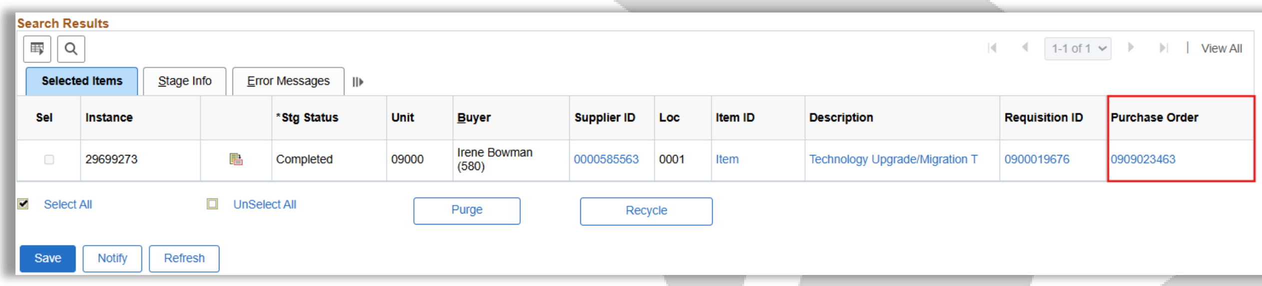
Use the **Refresh** button to update the page until it displays a Run Status of Success.

Sourcing Workbench

Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench

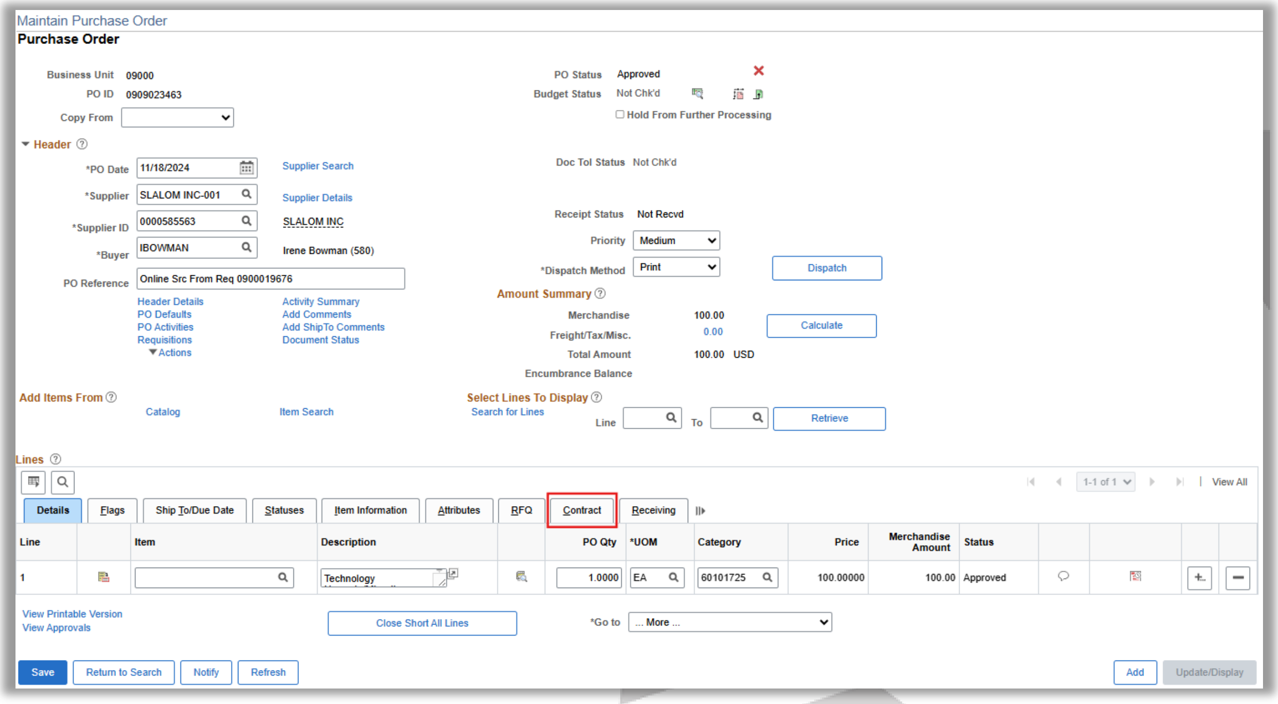


Input the **Business Unit** and **Requisition ID** and select the **Search** button.

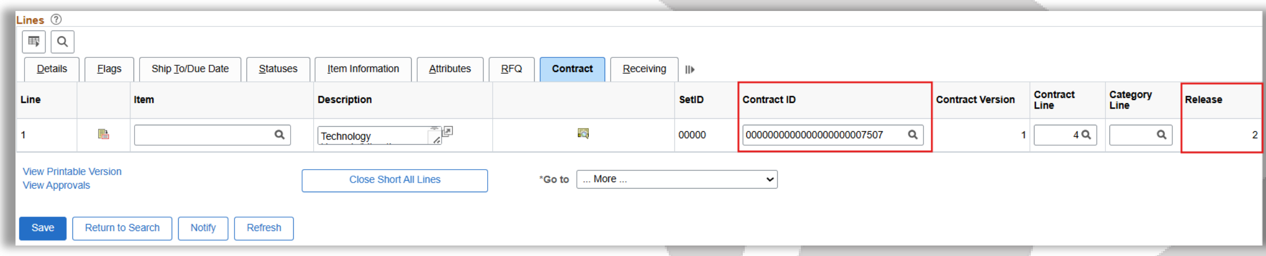


When the process is completed, you can review and complete the PO by **selecting** the **Purchase Order** hyperlink.

Purchase Order



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



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.