

State of Oklahoma

COR452

eProcurement Requisition Manual
Security Provisioning
Office of Management & Enterprise Services



OKLAHOMA

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Document History

Document Revision	Date	Description
1.0	03/19/2012	Initial Document
1.1	04/16/2012	Revised to add Line Details info.
1.2	02/08/2013	Revised for Statewide application
1.3	10/15/2014	Upgrade Update
2.0	11/15/2024	Upgrade Update
2.1	04/20/2026	Images Update



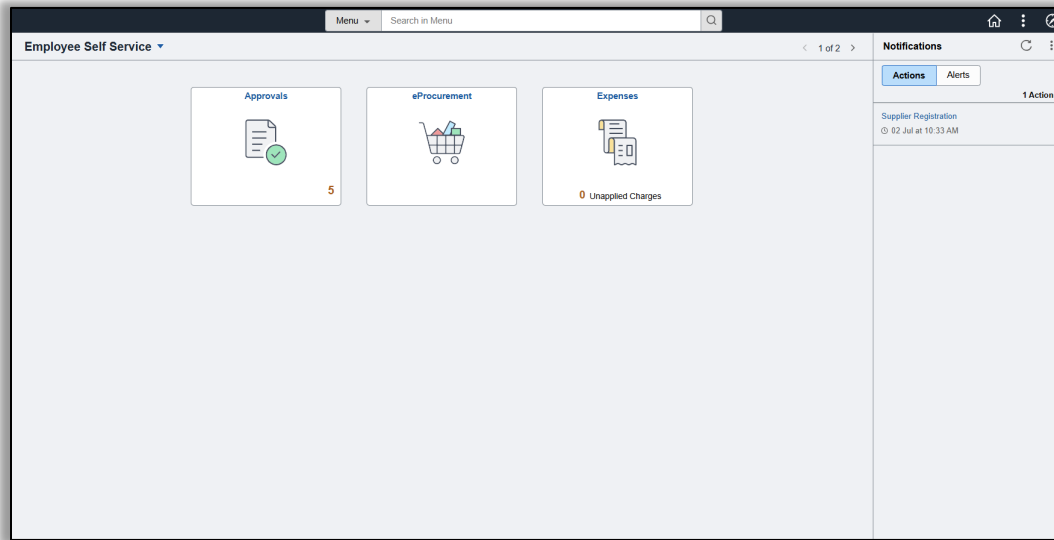
Learner Outcomes

- Initiate and create an eProcurement (ePro) requisition.
- Recognize how to expedite the requisition to a purchase order.
- Define how to achieve security provisioning.
- Understand the system described in this training is PeopleSoft.
- Describe system routes to approvers after requisition is created.
- Recognize system routes requisition approval to approvers to view requisition and act.
- Define approval process as approving or denying requisition through the organization (workflow) until accomplished or stopped.
- Define how to achieve security provisioning.

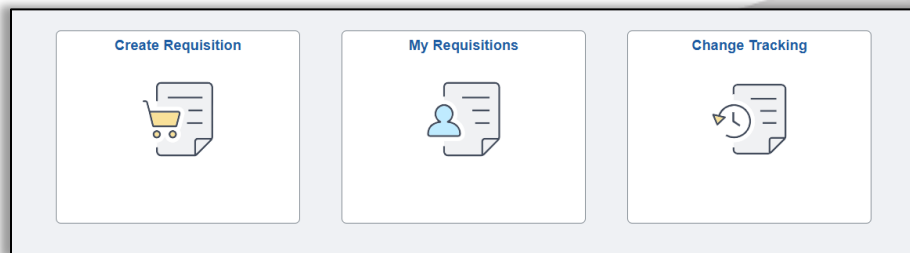


Part 1 - Creating the ePro Requisition

Step 1 – Define Requisition

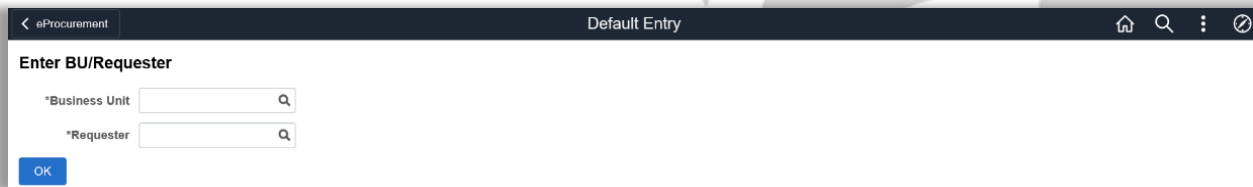


From the Home Page, **select the eProcurement tile.**

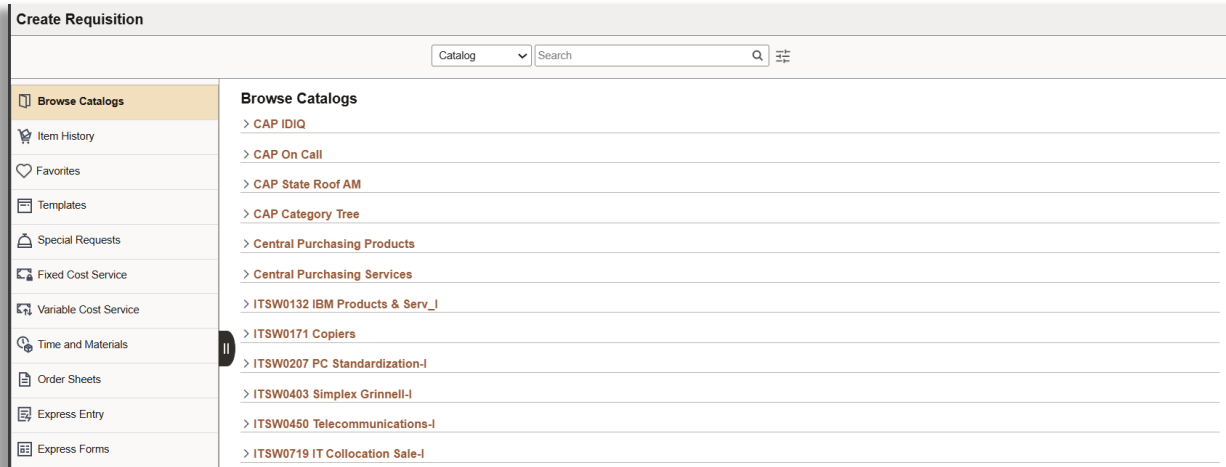


The eProcurement Menu opens.

Select Create Requisition.

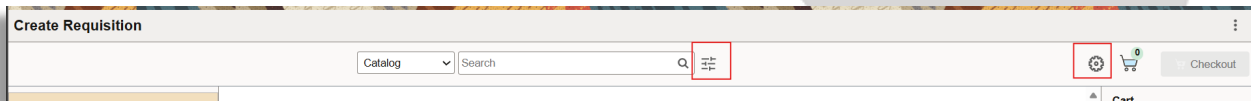


The user may need to enter their Business Unit and **select OK** to access the Create Requisition page.



Create Requisition page opens.

Select the **gear icon** in the upper right corner.



Links in top menu are:

- **Advanced Search** – Allows user to find items for a new or existing requisition. Access by hovering next to the Search field and selecting the Advanced Catalog Search icon.
- **Requisition Defaults** – Allows user to set defaults that apply to new requisitions. Access via the Tools icon next to the shopping cart, then **select Defaults**.

The tiles in left menu include different options to create a requisition:

- **Catalog.**
 - Item History.
 - Favorites.
 - Templates.
 - **Special Requests.**
 - Fixed Cost Service.
 - Variable Cost Service.
 - Time and Materials.
 - Order Sheets.
 - Express Entry.
- **Select Requisition Defaults.**



Requisition Defaults Page

Requisition Defaults shows field values that can be defaulted to create requisitions. This information saves user keystrokes by populating the requisition automatically as the requisition is created online.

Cancel
Requisition Defaults
Done

▼ Header Defaults

Business Unit Requisition Name

Requester
Bosten Benn

Priority ▼

Currency

▼ Line Defaults

Supplier ID Category

Supplier Location Unit of Measure

Buyer

▼ Shipping Defaults

Ship To Attention

Due Date

▼ Distribution Defaults

1 row

Chartfields1
Chartfields2
Chartfields3
Details
Asset Information
Show All

Distribution Line	Percent	Location	GL Unit	Account	
1	0.0000	09020030 <input type="button" value="Q"/>	09000 <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	-

Line Defaults, Shipping Defaults, and Distribution Defaults – The values that you enter on this page can be applied to the entire requisition at the line, shipment, or distribution levels.

NOTE: The fields that you enter on this page apply to the entire requisition. You can override these values on the requisition line or at the shipment or distribution level. Default values that appear in these fields come from the item definition—according to the item default hierarchy in PeopleSoft eProcurement and Purchasing. When no predefined values exist, the data you enter in the line defaults section replaces blank fields as defaults.



Field Definitions

Business Unit: Enter the Business Unit (Agency) requesting these materials or services.

Requester: Enter the name of the person requesting these materials or services. This can be the name that defaults, or you can purchase on behalf of another person. To purchase on behalf of another user, these requesters must be defined on the User Preferences page.

Priority: Default is Medium. Choices are High, Medium, and Low.

Requisition Name: (Optional) Enter a description of the request to help you identify this requisition as it flows through the system. The request can also be tracked using the requisition ID assigned when it is saved. If no name is entered, the requisition number will default into this field.

Supplier ID: If supplier ID is known, enter. If not, it can be populated when creating the Purchase Order.

Supplier Location: (Optional) View the location of the supplier. The default is based on the value that is defined for the supplier.

Buyer: **Select** a buyer for this requisition. At the requisition line level, the system uses the buyer from the item definition or item supplier.

Category: Define a default category for this requisition.

Unit of Measure: Define the unit of measure for use on this requisition.

Ship To: The standard address to which most of the requisition is delivered.

Add One Time Address tile: **Select** to access the Shipping Address page, where you can enter a shipping address that is not in the standard ship to location codes.

Due Date: The standard date you wish to receive the items on this requisition.

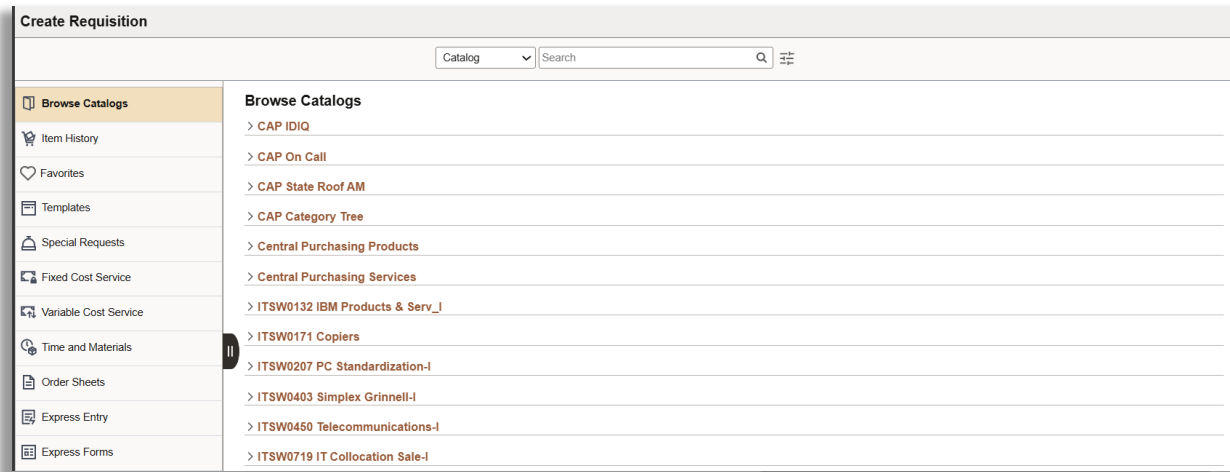
Attention: Enter the person from whom you want to receive notification about this shipment. The system includes this field value on outbound purchase orders to the Marketplace.

Distribution Defaults: Enter ChartField and asset management information as necessary.

Select the **Done** button.



Step 2 – Add Items and Services (Special Requests)



There are different methods to create a requisition, shown in the left tile menu.

- Browse Catalog, Special Requests, Express Item Entry, etc.

Special Requests is the most common method of creating a requisition.

Select the **Special Requests** section from the left windowpane.



Special Requests Page

Item Information

Special Requests

Item Information

*Item Description

*Price

*Quantity

*Category

Due Date

*Currency Code

*Unit of Measure

Amount Only No

Request New Item No

Supplier Information

Supplier ID

Supplier Location

Supplier Item ID

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

Comment

Comment Text

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

All fields with ‘*’ are required.

Under Item Information, complete **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 to enter **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**.



Look Up Category

Search Categories

×
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 ▼

Category 44121600

Find

Categories 1 row

Catalog	Category	Description
1 CP_PRODUCT_TREE	44121600	Desk supplies

The Look Up Category page opens.

The Category field is populated with the category code entered.

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 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.



Browse Category Tree

In addition, search for the category code by using the **Browse Category Tree** and selecting a catalog from the dropdown menu.

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 ▼

Category 44121600

Find

Categories 1 row

Catalog	Category	Description
1	CP_PRODUCT_TREE	44121600 Desk supplies

▶ **Browse Category Tree**

Select the Browse Category Tree line.

▼ **Browse Category Tree**

*Select a catalog CAP IDIQ ▼

Left | Right
CAP_IDIQ

CAP Category Tree

CAP IDIQ

CAP On Call

CAP State Roof AM

Central Purchasing Products

Central Purchasing Services

IT Telecommunication

ITSW0132 IBM Products & Serv_I

ITSW0171 Copiers

ITSW0206 WSCA Computer, LAN

ITSW0207 PC Standardization-I

ITSW0403 Simplex Grinnell-I

ITSW0450 Telecommunications-I

ITSW0718 Desktop Laser Mtnce-I

ITSW0719 IT Collocation Sale-I

ITSW0782 Imaging Contract-B

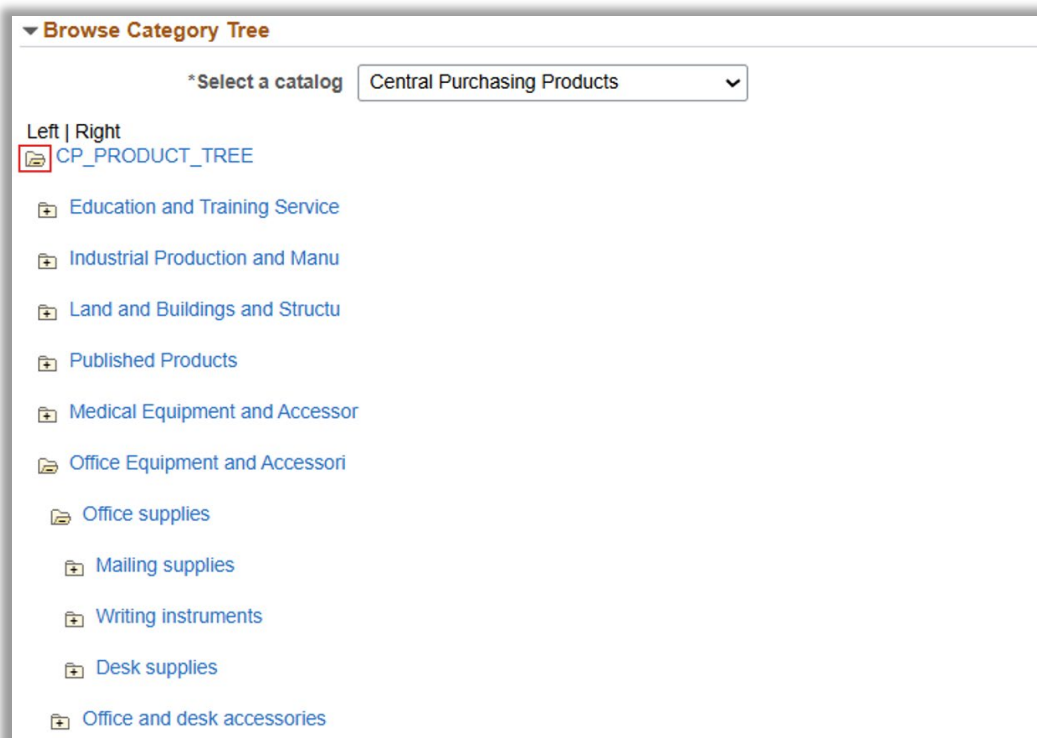
ITSW0794 Electronic Media De-I

ITSW0804A Online Legl-WGroup-I

ITSW0804B Online Legal-Lexis-I

ITSW0855 Grants Management-I

Select the dropdown menu, then **select** the appropriate catalog option.



Select the **folder icon** to drill down to the appropriate category.

To use the **Catalog** for a statewide release:

- **Select** the folder icon for the catalog.
- **Select** the appropriate category and continue.



Supplier Information

Under **Supplier Information**, enter the Supplier ID if known.

- Suppliers are **not** required on requisitions; in the event there is not one (e.g., a solicitation request).

Special Requests

Item Information

*Item Description: OFFICE SUPPLIES: General desk/office supplies

*Price: 50

*Quantity: 1

*Category: 44121600

Due Date: [Calendar icon]

*Currency Code: USD

*Unit of Measure: EA

Amount Only: No

Request New Item: No

Supplier Information

Supplier ID: [Search icon]

Supplier Location: [Search icon]

Supplier Item ID: [Search icon]

Manufacturer Information

Manufacturer ID: [Search icon]

Manufacturer's Item ID: [Search icon]

Comment

Comment Text: [Text area]

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

NOTE: Supplier Information is optional when creating a requisition and can be added later during PO creation.

Select the looking glass icon to search.

Supplier Lookup

Supplier SetID: 00000

Supplier ID: [Text box]

Supplier Name: [Text box]

Short Supplier Name: [Text box]

Alternate Supplier Name: [Text box]

Country: [Text box] [Search icon]

City: [Text box]

State: [Text box] [Search icon]

Postal Code: [Text box]

Search Results: [Empty list area]

Enter any information known about the supplier. For this example, the Supplier Name STAPLES was used to produce the following results.

Select the **Search** button.



Cancel
Supplier Lookup
Done

▼ Search

Supplier SetID 00000

Supplier ID

Supplier Name

Short Supplier Name

Alternate Supplier Name

Country

City

State

Postal Code

▼ Search Results 19 rows

Supplier ID	Supplier Name	Short Supplier Name	Default Location	Address Line 1	City	State	Postal Code
0000067919	STAPLES INC	STAPLES IN-001	0001	500 STAPLES DR	FRAMINGHAM	MA	01702-4478
0000067919	STAPLES INC	STAPLES IN-001	0030	STAPLES CONTRACT & COMMERCIAL LLC	DALLAS	TX	75266-0407
0000067919	STAPLES INC	STAPLES IN-001	0031	STAPLES BUSINESS ADVANTAGE	DALLAS	TX	75266-0407
0000067919	STAPLES INC	STAPLES IN-001	0032	STAPLES ADVANTAGE	DALLAS	TX	75266-0409
0000067919	STAPLES INC	STAPLES IN-001	0033	STAPLES ADVANTAGE	CHICAGO	IL	60696-3689
0000067919	STAPLES INC	STAPLES IN-001	0036	PO BOX 660409	DALLAS	TX	75266-0409
0000067919	STAPLES INC	STAPLES IN-001	0037	STAPLES BUSINESS CREDIT	ATLANTA	GA	30348-5638

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

Select the appropriate supplier.

Special Requests

Item Information

*Item Description

*Price *Currency Code

*Quantity *Unit of Measure

*Category Amount Only No

Due Date Request New Item No

Supplier Information

Supplier ID STAPLES INC Supplier Location

Supplier Item ID

Manufacturer Information

Manufacturer ID Manufacturer's Item ID

Comment

Comment Text

Send Comment to Supplier
 Show Comment on Receipt
 Show Comment on Voucher

Notice the Supplier Information has been updated.

Step 3 - Add to Cart and Checkout

Special Requests

Item Information

*Item Description: OFFICE SUPPLIES: General desk/office supplies

*Price: 50

*Quantity: 1

*Category: 44121600

Due Date: [Calendar Icon]

*Currency Code: USD

*Unit of Measure: EA

Amount Only: No

Request New Item: No

Supplier Information

Supplier ID: 0000067919 (STAPLES INC)

Supplier Location: 0030

Supplier Item ID: [Empty]

Manufacturer Information

Manufacturer ID: [Empty]

Manufacturer's Item ID: [Empty]

Comment

Comment Text: [Text Area]

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

[Add to cart](#)

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.

Special Requests

Item Information

*Item Description: [Empty]

*Price: [Empty]

*Quantity: [Empty]

*Category: [Empty]

Due Date: [Calendar Icon]

*Currency Code: USD

*Unit of Measure: [Empty]

Amount Only: No

Request New Item: No

Supplier Information

Supplier ID: [Empty]

Supplier Location: [Empty]

Supplier Item ID: [Empty]

Manufacturer Information

Manufacturer ID: [Empty]

Manufacturer's Item ID: [Empty]

Comment

Comment Text: [Text Area]

Send Comment to Supplier

Show Comment on Receipt

Show Comment on Voucher

[Add to cart](#)

[Checkout](#)

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.

Step 4 - Review and Submit

Select **Checkout** to review lines added to cart.

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.

Naming the Requisition

- **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.
- Use CO for change orders; PO for purchase orders for changes to an existing purchase order (e.g., CO FY26 PO18445).
- 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.

Creating Requisition Schedules/Distributions

Create Requisition Continue Shopping Save Submit

Checkout Order Total 50.00 USD

Requisition Summary

Business Unit: 09000 Mgmt and Enterprise Services Priority: Medium

Requisition Name: Office Supplies: General_TST

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
Line 1	Special Request OFFICE SUPPLIES: General desk/office supplies	<input type="radio"/> No	1.0000	EA	50.00	USD	60.00 USD	<input type="checkbox"/> <input type="button" value="ScheduleDetails"/> >

Line Comments

Order Total 50.00 USD

After reviewing the Requisition Summary information, **enter** Schedule Details for the line.

Select the **Schedule Details** button on the right side of the line.



Schedule Details Page

The Schedule Details page allows users to specify multiple shipping schedules for each line and to define multiple distributions for each schedule. The Schedule page defaults to allocate the total by Quantity, but it can also allocate by Dollar amount.

The screenshot displays the 'Schedule Details' page for an item. Key sections include:

- Item Summary:** OFFICE SUPPLIES: General desk/office supplies. Item ID, Category (Desk supplies), Supplier (000007619 STAPLES INC), Price (50.00 USD), Quantity (1,0000 EACH), Total Price (50.00 USD).
- Attributes:** Special Request.
- Schedule 1:** Ship To (00000), Attention To, Due Date, and a 'One Time Address' button. Summary: Quantity 1,0000, Price 50.00 USD, Total 50.00 USD.
- Distributions:** A table with columns: Distribution Line, Status, Dist Type, Location, Quantity, Open Qty, Percent, Merchandise Amount, GL Business Unit. Row 1: 1 Open, 00000, 1,0000, 1,0000, 100.0000, 50.00, 00000.

1. To add another schedule row, **select the Plus (+) button** on the Schedule line.
2. 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.

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.

Chartfields Tabs – Budget/Funding Information

▼ Distributions
Please enter GL Business Unit before selecting chartfield 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		09000	1.0000	1.0000	100.0000	50.00	09000

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

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.

▼ Distributions
Please enter GL Business Unit before selecting chartfield values

*Distribute By: Quantity

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

Account	Operating Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref
538130						

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.

▼ Distributions
Please enter GL Business Unit before selecting chartfield values

*Distribute By: Quantity

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

Sub-Account	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	CFDA#

Enter valid funding information into Chartfields Tabs.

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

Create Requisition Continue Shopping Save **Submit**

Checkout Order Total **50.00 USD**

Requisition Summary

Business Unit: 09000 Mgmt and Enterprise Services Priority: Medium

Requisition Name: Office Supplies: General_TST

Requester: BBENN06 Bosten Benn
Currency: USD

[Header Comments](#)

Additional Fields

Justification Comments

Requisition Lines Overview

Select All [Actions](#) 1 row

	Line 1	Special Request	OFFICE SUPPLIES: General desk/office supplies	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	
<input type="checkbox"/>				No	10000	EA	50.00	USD	50.00 USD	ScheduleDetails >

[Line Comments](#) [Delete](#) Order Total **50.00 USD**

Schedule Details **Line Details**

Item Summary

DESK SUPPLIES- TESTING ENVIROMENT

Item ID:
Item Category: Paper materials Physical Nature: Goods

Original Substituted Item:
Long Description: DESK SUPPLIES- TESTING ENVIROMENT Buyer: IBOWMAN

Price: 50.00 USD
Quantity: 1,0000 EACH
Total Amount: 50.00 USD [Buyer Information](#)

[Show Configurator](#)

Attributes

Special Request

Flags

Solicitation/Change Order/Ratification:

Sole Source Flag: Sole Source Type:

Statutory Exemption Flag: Statutory Exemption Type:

Contract Release Flag: Statutory Exemption Desc:

Statutory Exemption Comments:

[Expand All](#) [Collapse All](#)

Item Additional Information

Contract Information

Use Contract if Available: Contract Line:

Contract ID: Category Line:

Contract Version: [Contract Details](#)

[Supplier Information](#)

[Manufacturer Information](#)

[Sourcing Controls](#)

The Line Details page can be accessed in two ways:

- Select the **Right Arrow** icon, found in the Requisition Line Overview of the **Checkout** page.
- Select the Line Details tab, found at the top of the **Schedule Details** page .

Schedule Details
Line Details

Item Summary

DESK SUPPLIES- TESTING ENVIROMENT

Item ID	Physical Nature Goods
Item Category Paper materials	Buyer IBOWMAN
Original Substituted Item	<input type="button" value="Buyer Information"/>
Long Description DESK SUPPLIES- TESTING ENVIROMENT	<input type="button" value="Show Configurator"/>
Price 50.00 USD	
Quantity 1.0000 EACH	
Total Amount 50.00 USD	

Attributes

Special Request

Flags

Solicitation/Change Order/Ratification <input style="width: 80%;" type="text"/>	Sole Source Type <input style="width: 80%;" type="text"/>
Sole Source Flag <input type="checkbox"/>	Statutory Exemption Type <input style="width: 80%;" type="text"/>
Statutory Exemption Flag <input type="checkbox"/>	Statutory Exemption Desc
Contract Release Flag <input type="checkbox"/>	Statutory Exemption Comments <input style="width: 80%;" type="text"/>

Item Additional Information

Contract Information

Use Contract if Available <input checked="" type="checkbox"/>	Contract Line <input style="width: 80%;" type="text"/>
Contract ID <input style="width: 80%;" type="text"/>	Category Line <input style="width: 80%;" type="text"/>
Contract Version <input style="width: 80%;" type="text"/>	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.



Attributes

The screenshot shows a requisition form with the following sections and fields:

- Flags:** Solicitation/Change Order/Ratification (text field), Sole Source Flag (checkbox), Statutory Exemption Flag (checkbox), Contract Release Flag (checkbox), Sole Source Type (dropdown), Statutory Exemption Type (text field), Statutory Exemption Desc (text field), Statutory Exemption Comments (text area).
- Item Additional Information:** Device Tracking (checkbox), Stockless Item (checkbox), RFQ Required (checkbox), Inspection Required (checkbox), Amount Only (checkbox), Zero Price Indicator (checkbox).
- Contract Information:** Use Contract if Available (checkbox), Contract ID (text field), Contract Version (text field), Contract Line (text field), Category Line (text field), [Contract Details](#) (link).
- Supplier Information:** Supplier ID (text field), Supplier Location (text field), Supplier Item ID (text field), Supplier Name (text field), Supplier's Catalog Number (text field), Item Supplier Priority (text field).
- Manufacturer Information:** Manufacturer ID (text field), Manufacturer's Item ID (text field), UPN Type (text field), UPN ID (text field), Manufacturer (text field).
- Sourcing Controls:** Consolidate with other Reqs (checkbox), Calculate Price (checkbox), Override Suggested Supplier (checkbox), Inventory Source Flag (checkbox).

Red arrows in the image point to the **Expand All** button in the Flags section and the **Amount Only** checkbox in the Item Additional Information section.

Select the **Expand All** button to view all additional information fields.

Enter and **Select** options as necessary for the Requisition.

Amount Only Option - **Select** Yes if the line is an amount only line. If selected, the quantity is set to 1.

Use Contract if Available - **Select** this check box to:

- Have the system use the contract ID that you have entered here in the Contract ID field.
- Have the sourcing process find the best contract for this requisition line when you have left the Contract ID field blank.
- Deselect this check box to not use contract pricing for the requisition line.

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



Step 5 – Submit Requisition

Create Requisition

Continue Shopping Save **Submit**

Order Total 50.00 USD

Checkout

Requisition Summary

Business Unit 09000 Mgmt and Enterprise Services Priority Medium

Requisition Name Office Supplies: General_TST

Requester JBUMGARNER Joshua Bumgarner

Currency USD

Header Comments

Additional Fields

Justification Comments

Requisition Lines Overview

Select All Actions

Line	Item	Amount Only	Quantity	Unit of Measure	Price	Currency	Total
Line 1	Special Request DESK SUPPLIES- TESTING ENVIRONMENT		1.0000	EA	50.00	USD	50.00 USD

Schedule/Details

After reviewing Line information and creating Schedule/Distribution information, the Requisition can be submitted for approval.

Select the Radio Box on the left side of the appropriate line or **select** the Radio Box next to “Select All” to select all lines.

Select the **Save** button to save the requisition for submittal later.

Select the **Submit** button to submit the selected lines for approval.

Checkout Confirmation

Requisition Details

Business Unit 09000 Total Lines 1

Requisition ID 0900019341 Total Amount 50.00 USD

Requisition Name Office Supplies: General_TST Budget Checked Status **Not Checked**

Last Modified Date 07/18/2024 4:23:41PM

Status Pending Approval

Check Budget Pre-Check Budget

View Approval Chain

Next Steps

Edit this Requisition
Modify this requisition

My Requisitions
Go to existing requisitions

Create Requisition
Create another requisition

Select the **View Approval Chain** button to view approval routing information.



Creating the Requisition (Item ID)

Complete Step 1 illustrated above (Pages 6-9).

Step 2: Add Items and Services

Advanced Search Link

The screenshot shows the 'Create Requisition' window. At the top, there is a 'Catalog' dropdown menu and a search field. The 'Catalog' menu is open, displaying a list of catalogs including 'CAP IDIQ', 'CAP On Call', 'CAP State Roof AM', 'CAP Category Tree', 'Central Purchasing Products', 'Central Purchasing Services', 'ITSW0132 IBM Products & Serv_I', 'ITSW0171 Copiers', 'ITSW0207 PC Standardization-I', 'ITSW0403 Simplex Grinnell-I', 'ITSW0450 Telecommunications-I', and 'ITSW0719 IT Collocation Sale-I'. A red arrow points to the 'Advanced Search' catalog option.

Select the [Advanced Search](#) catalog to the left of the Search field at the top of the page. The Advanced Search Catalog screen will display.

The screenshot shows the 'Advanced Catalog Search' window. It features a 'Saved Searches' dropdown, a 'Search Tips' link, and a 'Search Contains' dropdown set to 'All of the fields entered'. Below this, there are several search criteria fields: Description, Manufacturer, Manufacturer ID, Supplier, Supplier ID, Item ID (populated with '1000013634'), Model, UPN ID, Category ID, Supplier Item ID, Manufacturer Item ID, and Category. At the bottom, there is a 'Price Range' section and three buttons: 'Search', 'Clear', and 'Save Search'.

Enter any information known about the Item to narrow the search results.

Select Search button.



Step 3 - Add to Cart and Checkout

Search Results

ePro Home

Items 1 through 5 of 5

Items

Sort By Description

1000013634	OFFICE SUPPLIES: General desk/office supplies	\$ 0,0100 YEAR	Supplier: FRANK G LOVE ENVELOPES INC	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days: 21
1000013634	OFFICE SUPPLIES: General desk/office supplies	\$ 0,0100 YEAR	Supplier: SUPPLYONE OKLAHOMA CITY INC	Supplier ID: 0000073822 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:
1000013634	OFFICE SUPPLIES: General desk/office supplies	\$ 1,0000 YEAR	Supplier: STAPLES INC	Supplier ID: 0000087919 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:
1000013634	OFFICE SUPPLIES: General desk/office supplies	\$ 0,0100 YEAR	Supplier: MCLAIN-CHITWOOD OFFICE PRODUCTS INC	Supplier ID: 0000073852 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:
1000013634	OFFICE SUPPLIES: General desk/office supplies	\$ 0,0100 YEAR	Supplier: FOCUS OFFICE FURNITURE LLC	Supplier ID: 0000473215 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:

To view the item details, **select** the appropriate line.

Select the **Add to Cart** button for the appropriate Item.

The cart icon will show how many lines are included in the requisition. When finished entering lines, **select** the **Checkout** button.

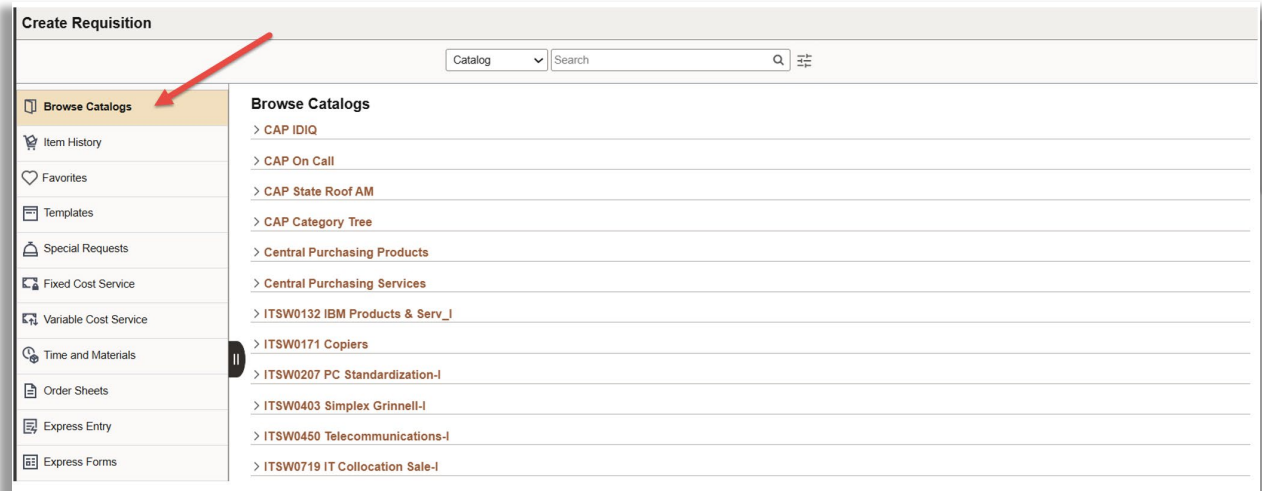
Complete Steps 4 and 5 shown above to submit the Requisition. (pages 18-26).



Creating the Requisition (Catalog)

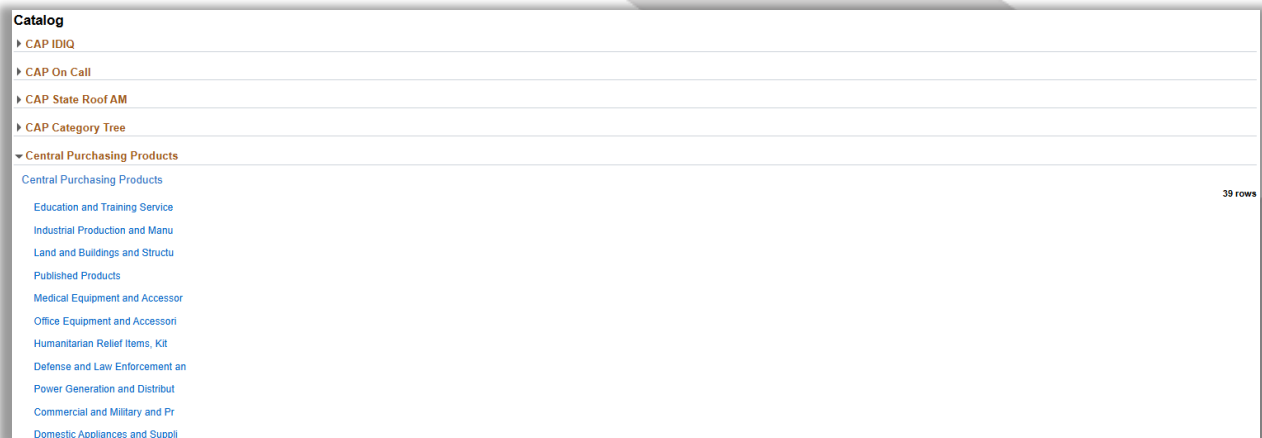
Complete Step 1 illustrated above (Pages 6-9).

Step 2: Add Items and Services



From the Create Requisitions page, select the **Browse Catalogs** link in the left menu.

Select the appropriate Catalog to drill down to find the ItemID.



For this example, Central Purchasing Products was expanded to select Office Equipment and Accessories.



Step 3 - Add to Cart and Checkout

Catalog

ePro Home

00000/CP_PRODUCT_TREE/Central Purchasing Products/Office Equipment and Accesson

Items 1 through 70 of 7

Sort By Description

1000006948	ENVELOPE #10 Box Regular, 2500/ctn, 24 lb. manufactured from recycled fibers (minimum 20% post consumer waste) , full cartons only. Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 12.4100 Box	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:	+W Add to Cart
1000007426	ENVELOPE #10 Box w/windows in std place 2500/ctn, 24 lb. manufactured from recycled fibers (minimum 20% post consumer waste) , full cartons only Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 14.6900 Box	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:	+W Add to Cart
1000011261	ENVELOPE 9X 12, Brown Open End, 2500, 500/CNT 28lb Kraft, plain unglazed, Catlog, gummed flap Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 49.1200 Thousand	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:	+W Add to Cart
1000007000	ENVELOPE Self seal flap-Envelopes, with self-seal flap-ENVELOPES WITH SELF-SEAL FLAPS Supplier: FRANK G LOVE ENVELOPES INC	\$ 38.0500 Box	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:	+W Add to Cart
1000027510	ENVELOPE Special #10 Double Window With Transparent Covering On Window 24# Whitewove No Printing Top Window Size: 1 1/8 Wide, 3 1/2 Length Top Window Location: 3/4 From Left, 2 3/8 From Bottom, 5/8 From Top Bottom Window Size 1 3/8 widem 4 1/4 Length Bo Supplier: FRANK G LOVE ENVELOPES INC Preferred Supplier	\$ 35.9000 Case	Supplier ID: 0000077430 Supplier Item ID: Manufacturer ID: Mfg Item ID: UPN Type: UPN ID: Lead Time Days:	+W Add to Cart

The **Sort By** dropdown menu can be used to sort items by:

- Description
- Price – High to Low
- Price – Low to High

Select the **Add to Cart** button on the appropriate Item line to add the item to the cart.

The cart icon will show how many lines are included in the requisition. When finished entering lines, select the **Checkout** button.

Complete Steps 4 and 5 shown above to submit the Requisition. (pages 18-26).

Part 2: Approving the Requisition

Workflow

- Workflow consists of taking a transaction through organization requisition approval process until accomplished or stopped.
- After requisition is created, system routes to approvers and into worklist.
- Pending approval action, approval workflow engine maintains overall state of transactions approval status, invokes routings and interacts with application.
- The system notifies approvers and reviewers of pending transactions that need attention.
- Approvers and reviewers access transaction details, provide comments, and act (approve, deny, hold or push back) for transaction.
- The system checks for additional routings in same routing path.
- If all steps have been completed for stage, then next step is started in next stage.

Approval Notifications

Email

Email approvals are designed to route approvals to Approver's email address when action is required. Approver must first log into system.

Worklist

Requisitions are routed to approver to act.

Requisition Approval – 5 Steps

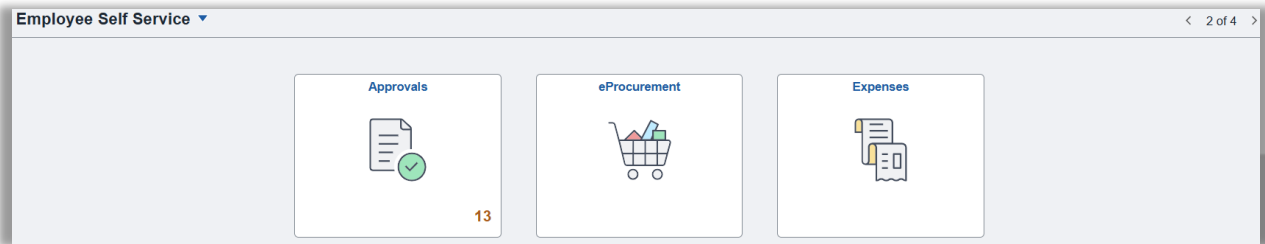
Five major steps in approving an eProcurement requisition:

- Log into PeopleSoft.
- **Select** requisition to approve.
- Review requisition.
- Edit requisition if necessary.
- Approve/deny requisition.

NOTE: Requisition can also be put on hold or pushed back if needed.



Approvals Tile



From the **Home Page**, select the “Approvals Tile”




View By	Type	All			
All	12				
Purchase Order	8				
Requisition	4				
12 rows					
Purchase Order	59,446.62 USD	7200 NTT Ratification - 45200 / 4529069637 / Diamond Herring	⚠ Medium Priority	Routed	10/27/2025
Purchase Order	390,100.00 USD	FLEET MMS - 80500 / 8059022149 / Rowena Alford	⚠ Medium Priority	Routed	11/06/2025
Requisition	2,317,027.20 USD	Grand Lake 22570 - 45200 / 4520014017 LaToya C Mitchell	⚠ Medium Priority	Routed	11/10/2025
Purchase Order	52,000.00 USD	80700 / 8079004573 / Carol Williams-Downing (807)	⚠ High Priority	Routed	11/12/2025
Purchase Order	50,000.00 USD	FY26 Financial Analysis - 84000 / 8409000032 / Samantha Castro (ABS)	⚠ Medium Priority	Routed	11/12/2025
Requisition	167,023.00 USD	Lawton DOC Machine Order - 80500 / 8050016258 Emilie N Stufflebeam	⚠ High Priority	Routed	11/13/2025
Purchase Order	391,159.00 USD	34500 / 3459085979 / Isela Mendoza	⚠ Medium Priority	Routed	11/14/2025
Requisition	288,000.00 USD	Forensic Psychological 22359 - 45200 / 4520014036 LaToya C Mitchell	⚠ Medium Priority	Routed	11/14/2025
Requisition	190,352.20 USD	FY26 RAT LAW / NOR INSYNC - 65000 / 6500002467 CINDY CRAWFORD	⚠ Medium Priority	Routed	11/14/2025

The Pending Approvals page is displayed. Use this page to view the Pending Approvals available for user’s workflow role.



View By Dropdown

Use the **View By** dropdown to sort Approvals by:





- Type – View Approvals by Type.

View By		Type	
	All		12
	Purchase Order		8
	Requisition		4

- Date Routed – View Approvals by Date.




View By		Date Routed	
	All		12
	Older		12

- From – View Approvals by user in previous approval level.





View By		From	
	All		12
	Amy Elizabeth Kimzey		1
	Ann Worden		1
	Bryan Wiewel		2






- Priority – View Approvals by Priority Level.

View By		Priority	▼
	All	12	
	High Priority	2	
	Medium Priority	10	

- Requester – View Approvals by Requester.

View By		Requester	▼
	All	12	
	Ann Worden	1	
	CINDY CRAWFORD	1	
	Carol Williams-Downing (807)	1	

Select Type from the View By dropdown.

View By		Type	▼
	All	12	
	Purchase Order	8	
	Requisition	4	

Select Requisition.



Requisition Approvals Page

Requisition

Approve Deny More

4 rows

<input type="checkbox"/>	Requisition 2,317,027.20 USD	Grand Lake 22570 - 45200 / 4520014017 LaToya C Mitchell ⚠ Medium Priority	Routed 11/10/2025	>
<input type="checkbox"/>	Requisition 167,023.00 USD	Lawton DOC Machine Order - 80500 / 8050016258 Emilie N Stufflebeam ⚠ High Priority	Routed 11/13/2025	>
<input type="checkbox"/>	Requisition 288,000.00 USD	Forensic Psychological 22359 - 45200 / 4520014036 LaToya C Mitchell ⚠ Medium Priority	Routed 11/14/2025	>
<input type="checkbox"/>	Requisition 190,352.20 USD	FY26 RAT LAW / NOR INSYNC - 65000 / 6500002467 CINDY CRAWFORD ⚠ Medium Priority	Routed 11/14/2025	>

Approver Comments

The page displays Requisitions that have been routed to user for approval.

Select the **Right Arrow** icon on the right-hand side of the Requisition line, or anywhere on the line, to review for approval.

Request for Forensic Psychological 22359
288,000.00 USD

Approve Deny More

Header is pending your approval

Summary

Business Unit 45200 Requisition ID 4520014036
 Routed Date November 12, 2025 Requisition Date November 12, 2025
 Requester LaToya C Mitchell Entered by LaToya C Mitchell
 Approval Justification Per Dedra Hansbro, initiate Oct 1, 2025-June 30, 2026 competency evaluation contract. Budget Header Status Valid
[Edit Requisition](#)

More Information

View Printable Version >

Lines

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	Justice Services - Forensic Competency - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803]; Exempt from Comp bid Exempt Professional Services	>

2 rows

This page displays the Requisition for approval.

The **Pending Approvals** button will navigate back to the available approvals.

Select the **Right Arrow** icon on the right-hand side of the line, or anywhere on the line, to view the Approval Line Details page.

Justice Services - Forensic Competency - State (Oct-June)
144,000.00 USD

Line Details

Business Unit 45200 Requisition ID 4520014036
 Line 1 Item ID
 Supplier FORENSIC P-005 Quantity 1 EA
 Price 144,000.00 USD Ship To 45201
 Category 85101500

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	45201	1 EA	144,000.00 USD	144,000.00 USD	LaToya C Mitchell	>

Select on the Schedule Line to view the Fluid Approval Distribution page.

Justice Services - Forensic Competency - State (Oct-June)
144,000.00 USD

Line Details

Business Unit 45200 Requisition ID 4520014036
 Line 1 Item ID
 Supplier FORENSIC P-005 Quantity 1 EA
 Price 144,000.00 USD Ship To 45201
 Category 85101500

Shipping Information

Schedule	Ship To	Quantity	Price	Amount	Attention	Due Date
1	45201	1 EA	144,000.00 USD	144,000.00 USD	LaToya C Mitchell	>

After reviewing the Distribution and Schedule details, select the [Back to Header](#) link on the Approval Line Details page.

Request for Forensic Psychological 22359
288,000.00 USD

Header is pending your approval Approve Deny More

Summary

Business Unit 45200 Requisition ID 4520014036
 Routed Date November 12, 2025 Requisition Date November 12, 2025
 Requester LaToya C Mitchell Entered by LaToya C Mitchell
 Approval Justification Per Dedra Hansbro, initiate Oct 1, 2025-June 30, 2026 competency evaluation contract. Budget Header Status Valid [Edit Requisition](#)

> More Information

▼ Lines 2 rows

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	Justice Services - Forensic Competency - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>
2	Justice Services - Competency Evaluations - Non - CCBHC Contractors - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>

Approver Comments

Approval Chain >

Select the **Approve** button to approve the Requisition. This will route the Requisition to the next user(s) in the approval chain.

Requisitions can also be denied using the **Deny** button. If you select Deny, you must enter a reason in **Approver Comments** field.

The **More** button allows for the Requisition to be put on hold or pushed back.

Edit Requisition in Approvals

Request for Forensic Psychological 22359
288,000.00 USD

[Approve](#) [Deny](#) [More](#)

Header is pending your approval

Summary

Business Unit 45200	Requisition ID 4520014036
Routed Date November 12, 2025	Requisition Date November 12, 2025
Requester LaToya C Mitchell	Entered by LaToya C Mitchell
Approval Justification Per Dedra Hansbro, initiate Oct 1, 2025-June 30, 2026 competency evaluation contract.	Budget Header Status Valid

[Edit Requisition](#)

> More Information

∨ Lines 2 rows

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	Justice Services - Forensic Competency - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>
2	Justice Services - Competency Evaluations - Non - CCBHC Contractors - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>

Approver Comments

Approval Chain

From the Requisition Approval page, Select the [Edit Requisition](#) link.

Edit Shopping Cart for Requisition ID 4520014036
2 item(s) to buy now.

∨ Requisition Summary

Business Unit 45200

Requisition Name Forensic Psychological 22359

Requester LMITCHELL01

Currency USD

2 rows

Item Description ¹	Status ¹	Price ¹	Currency ¹	Quantity ¹
Justice Services - Forensic Competency - State (Oct-June)	Pending	144,000.00	USD	1.0000 Delete

Select the [Item Description](#) hyperlink.

Special Requests

Item Information

*Item Description 197 characters remaining

*Price

*Quantity

*Category

Due Date

*Currency Code

*Unit of Measure

Amount Only

Request New Item

Supplier Information

Supplier ID FORENSIC PSYCHOLOGICAL SERVICES LLC

Supplier Location

Supplier Item ID

Manufacturer Information

Manufacturer ID

Manufacturer's Item ID

Comment

Comment Text

Send Comment to Supplier

Show Comment on Receipt

The Requisition page is displayed. From this page, the user can edit the requisition as necessary before approval.

Edit Requisition – Funding Profile

To edit the funding profile, select the **Checkout** button.

Edit Requisition page is displayed. Select the **Schedule Details** button to edit the Schedule information.

Schedule Details Page

Item Summary

Justice Services - Forensic Competency - State (Oct-June)

Item ID
Item Category Healthcare centers

Supplier ID 0000617806 FORENSIC PSYCHOLOGICAL SERVICES LLC
Supplier Location 0001

Supplier Item ID
Price 144,000.00 USD
Quantity 1.0000 EACH
Total Amount 144,000.00 USD

Buyer BOWMAN Irene Bowman (580)
Manufacturer
Manufacturer's Item ID
UPN Type
UPN ID

Attributes
Special Request

Schedule 1

Schedule 1
Quantity 1.0000
*Ship To 45201
Price 144,000.00 USD
Attention To LaToya C Mitchell
Total 144,000.00 USD
Due Date
Address OKLA DEPT OF MENTAL HEALTH & SAS 2000 N CLASSEN BLVD E600 OKLAHOMA CITY, OK 73106
One Time Address
Ship To Comments Price Adjustments Custom Fields

Distributions
Please enter GL Business Unit before selecting chartfield values
Distribute By Amount

Chartfields Details Budget Information Asset Information Show All

Distribution Line	Status	Dist Type	Location	Percent	Merchandise Amount	GL Business Unit	Open Amount	Account	Operating Unit
1	Open		45201	100.0000	144000.00	45200	144000.00	515710	54117

Select **Chartfields 2** Tab to edit:

- Account.
- Operating Unit.
- Fund Type.
- Department.
- Class Funding.
- Budget Reference.
- PC BU.
- Project.
- Activity.
- Category

Select the **Plus (+)** icon or **Minus (-)** icon to add or delete a distribution line.

Select the Asset Information Tab.



Edit Requisition – Asset Information

▼ Distributions

Please enter GL Business Unit before selecting chartfield values

Distribute By Amount

Chartfields Details Budget Information **Asset Information** Show All

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

AM Business Unit – The Business Unit responsible for Asset.

Profile ID – Selected from a list.

Select the **Profile ID** looking glass for a list to choose from.

After updating funding and asset information as necessary, select the **Done** button.

Edit Requisition

Checkout for Requisition ID 0900019341

Continue Shopping Save **Submit**

Order Total 50.00 USD
Pre-Encumbrance Balance Not Available USD

▼ Requisition Summary

Business Unit 09000 Mgmt and Enterprise Services
Requisition Name Office Supplies: General_TST
Requester BBENN06 Bosten Benn
Currency USD

Priority Medium
Budget Check Status Valid Budget Details

Check Budget Pre-Check Budget

Header Comments
Preview Approvals

► Additional Fields

▼ Justification Comments

▼ Requisition Lines Overview

Select All Actions

Line	Item ID	Supplier	Status	Amount Only	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request OFFICE SUPPLIES: General desk/office supplies	STAPLES INC	Pending	No	1.0000	EA	50.00	USD	50.00 USD	ScheduleDetails

Line Comments Delete

Order Total 50.00 USD
Pre-Encumbrance Balance Not Available

Select the **Save** button to save changes and return to submit later.

Select the **Submit** button to submit changes made to Requisition.

Requisition Details

Business Unit 45200	Total Lines 2
Requisition ID 4520014036	Total Amount 288,000.00 USD
Requisition Name Forensic Psychological 22359	Budget Checked Status Valid Budget Details
Last Modified Date 03/03/2026 11:58:48AM	Pre-Encumbrance Balance Not Available
Track Batch 1	Currency Code USD
Status Pending Approval	Check Budget Pre-Check Budget
View Approval Chain	

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 check budget following the changes made to Requisition.

Workflow Ad Hoc Feature

Requisition
Request for Forensic Psychological 22359
288,000.00 USD

Header is pending your approval

Summary

Business Unit 45200	Requisition ID 4520014036
Routed Date November 12, 2025	Requisition Date November 12, 2025
Requester LaToya C Mitchell	Entered by LaToya C Mitchell
Approval Justification Per Dedra Hansbro, initiate Oct 1, 2025-June 30, 2026 competency evaluation contract.	Budget Header Status Valid

[Edit Requisition](#)


> More Information

▼ Lines

Line Number	Item Description	Merchandise Amount	Sole Source Details	Statutory Exemption Details	Contract Details
1	Justice Services - Forensic Competency - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>
2	Justice Services - Competency Evaluations - Non - CCBHC Contractors - State (Oct-June)	144,000.00 USD	N	Y 01 - ALL - 74 O.S. § 85.7(A)(6)(a) Defined Professional Services [18 O.S. §803], Exempt from Comp bid Exempt Professional Services	>

Approver Comments

Approval Chain >



From the Requisition approval page, select the **Approval Chain** button to view the Approval Chain.

Approval Chain

Agency Approval Steps

▼ Forensic Psychological 22359 **Approved**

MHSAS BU452

- Approved
LaToya C Mitchell
Agency Buyer/CPO
11/12/25 2:01 PM >
- Approved
Bryan Wiewel
Senior Buyer
11/12/25 2:02 PM >

Approve Requisitions

▼ Forensic Psychological 22359 **Pending**

[Start New Path](#)

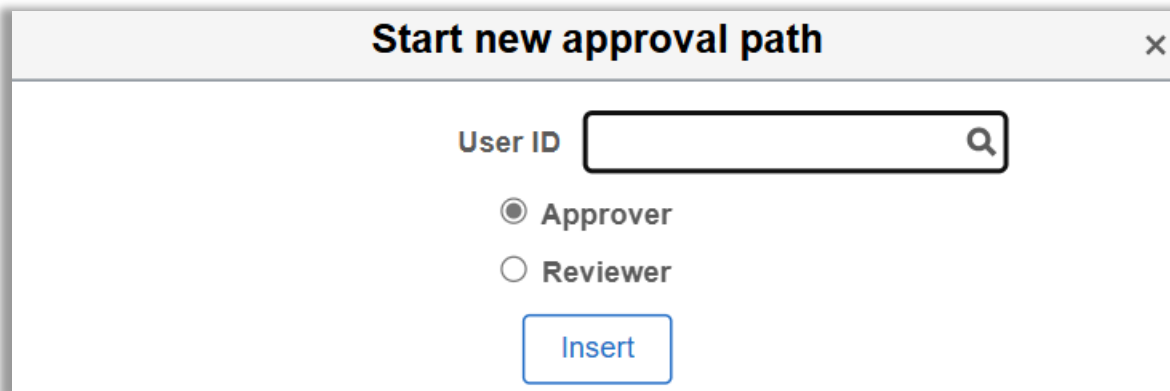
Requires Central Purc Approval

- Approved
LaToya C Mitchell
Agency Buyer/CPO
11/14/25 12:05 PM >
- Pending +
Multiple Approvers
Buyer Assignment (OK) >

Select the **Start New Path** button to add an additional approver or reviewer.

The **Add** icon will insert a new approver or reviewer on the selected approval level.

Approvers and reviewers must be added prior to approving or denying requisition.

A screenshot of a web application dialog box titled "Start new approval path" with a close button (X) in the top right corner. The dialog contains a "User ID" label followed by a search input field with a magnifying glass icon. Below the input field are two radio button options: "Approver" (which is selected) and "Reviewer". At the bottom of the dialog is a blue "Insert" button.

Enter the PeopleSoft User ID of the user you wish to add as Approver or Reviewer.

Select option to indicate either Approver or Reviewer.

Select the **Insert** button.

FAQ's

Question: What triggers the approval path workflow?

Answer: Selecting Save and Submit for workflow to start. Category code and Department ID (5-digit agency ID) determine workflow path and approvers it routes to.

NOTE: All changes for ePro requisitions must be completed in eProcurement and not in Purchasing.

Question: What would stall the requisition from moving through the approval path workflow?

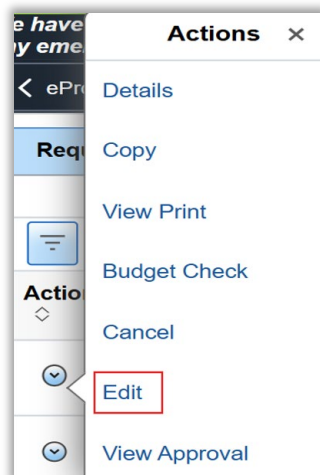
Answer: Nothing will stall approval path.

- Will always generate.
- Will either route to correct people or not.
- If not routing to correct people, information on requisition is incorrect, i.e., category code or department ID.
- If path delayed:
- Approvers in path are not approving it or requestor hasn't provided documentation.

Question: How does the user edit a requisition after starting workflow?

Answer: If requisition has not been sourced to a PO, navigate to **eProcurement Tile > My Requisitions**, then select **Filter** button to **enter** filter criteria.

Select edit from the left side "Action" drop-down



Question: Can the user add attachments without starting requisition over?

Answer: Yes

Question: Why is it important to use the correct category code?

Answer: The user cannot save a requisition without a Business Unit or category code. Selecting correct category code ensures requisition routes to appropriate approver.

Question: What changes would start requisition over if the user saved changes after starting workflow?

Answer: A dollar or quantity change to requisition.

Question: How can a requisition be restarted after starting in workflow?

Answer: Change requisition amount by a penny; save and submit change.

Question: How does the user ensure they are using the correct statewide contract?

Answer: The user will not be able to add/attach contract to the requisition if not using correct supplier, category code or UOM.

NOTE: If the PeopleSoft contract number is not known, it can be looked up in PeopleSoft or on OMES website.

Security Provisioning

Provisioning is now done through [Service Now](#).

The screenshot shows the Service Now Security Provisioning portal. On the left is a navigation sidebar with the following items: Central Purchasing (CP), Finance, Grants Management Office, Human Capital Management, Information Services (IS), **Access & Accounts** (highlighted), Asset Management, Business Continuity and Disas..., Computers and Accessories, CyberSecurity, Network/Server, Project and IT Approval Requ..., Software & Applications, Storage & Data, Tech Support, Mainframe, Outreach, and Risk, Assessment & Compliance. The main content area contains a grid of request cards:

- Employee Offboarding**: Disconnect employee access to technology applications and devices. [View Details](#)
- Employee Onboarding**: Provide access to technology applications and devices to get started as a new employee. [View Details](#)
- File or Folder Access**: Request access or report an access problem to a file or folder. [View Details](#)
- Google Cloud Platform Acc...**: Request the creation of a Google Cloud Platform account. [View Details](#)
- Group Deactivation**: Request for decommissioning groups thus rendering them inoperable. [View Details](#)
- Internal (Intra-Agency) Dep...**: Provide access to technology applications and devices to get started as a new employee. [View Details](#)
- Mailbox or OneDrive Acces...**: Request access to OneDrive or request access to mailbox. [View Details](#)
- Name Change Request**: Requesting name change to current user account. [View Details](#)
- PeopleSoft Financials Acce...**: PeopleSoft Access Request. [View Details](#)

A red arrow points to the 'PeopleSoft Financials Access Request' card.

Conclusion – PeopleSoft Training

- For in-depth PeopleSoft training, [access the PeopleSoft Financials 9.2 User Guide](#).

