OKLAHOMA
Office of Management
& Enterprise Services

OMES Statewide Learning Services

User Guide

PeopleSoft Fluid Requisition Functions and Purchase Order Processing Guide

Using the New Exemption Flag, Sole Source and Contracts

Document Revision History

Date	Description	Document Version
1/20/2024	Initial Document Creation – Statewide Learning Services	V2
1/29/2024	Updated Section 9 to include additional step.	V2.1

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User Guide

Using the new Fluid User Interface
Exemption, Sole Source and Contract Release Flags

Overview

PeopleSoft Fluid View Upgrade

OMES has selectively adopted and rolled out Phase I of the upgrade to Oracle PeopleSoft (PS) Fluid user interface (UI). This upgrade, along with annual PS updates (PUMs), ensures the best and most current technologies are in place to run the PS system. The **Fluid** upgrade also enhances the use of devices such as tablets and mobile phones to streamline system access and quick approvals.

Some PeopleSoft purchasing functions which will now be accessed in the Fluid view and include:

New Fluid View	• Requisition creation, editing and review. • Requisition submission. • Budget checking. • Approver Role – Requisition/purchase order approval.
Current Classic Plus View	• Expedite requisition to purchase order. • Requester – submit approval and budget check PO. • Purchase order inquiry. • Dispatch purchase order. • Purchase order add/update.

Classic Plus vs. Fluid Views

- In this guide, look for illustrations of the Classic Plus view vs. the new Fluid view.

PeopleSoft Modifications – New Flags

Modifications have been implemented to fulfill the recommendations of the Legislative Office of Fiscal Transparency (LOFT), the Governor's Office via Executive Order 2023-04 and the Oklahoma Attorney General's Office via 2023 OK AG 4.

Modifications include the addition of flags and mandatory data fields to capture significant information regarding statutory exemptions (including agency specific contracts), sole source acquisitions and statewide contract releases.

Phase II - PO Workflow Redesign | Elimination of Origin

Phase II of the upgrade will incorporate the elimination of “origin” as the criteria which controls the current approval routing of POs. OMES will migrate to dollar amount, quantity and category code as the determining factors of the approval workflow in the redesign.

The redesigned workflow will mimic the way ePro requisition approvals route and is projected for a March 2024 rollout.

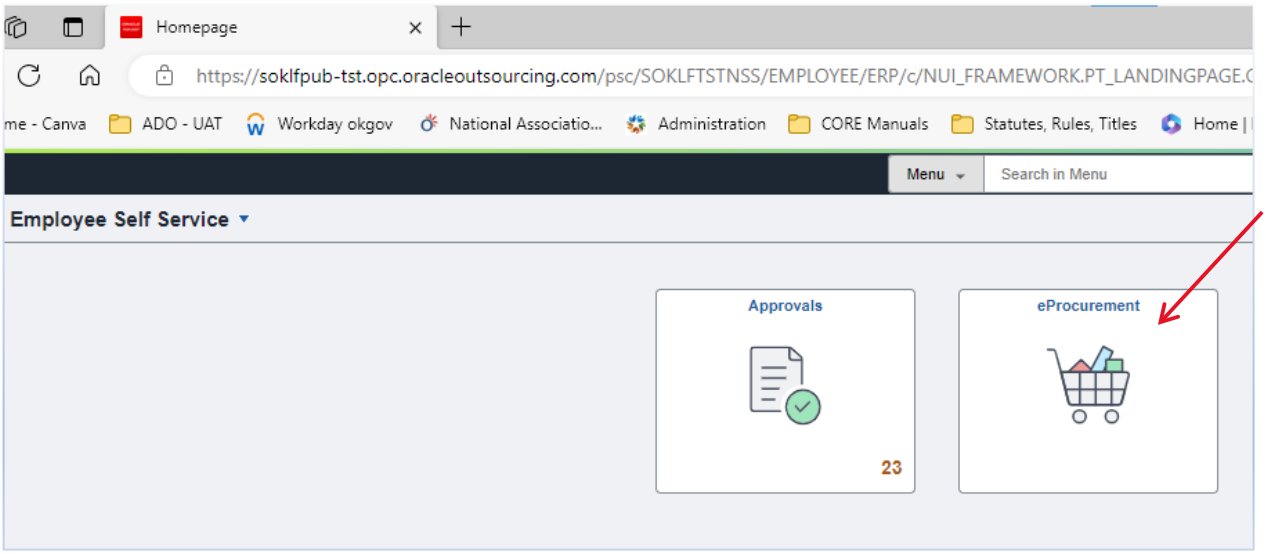
Procedure – Creating a Requisition using Fluid

Log in to Oracle: [Oracle PeopleSoft Sign-in (ok.gov)]

Once logged into PeopleSoft Financials:

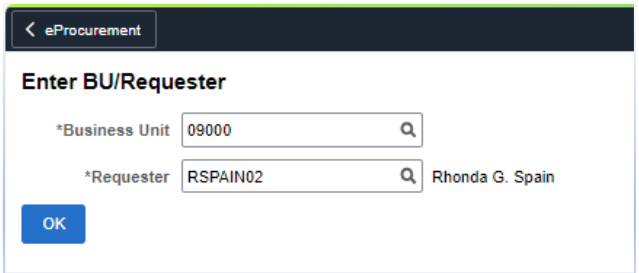
Step 1: Select the eProcurement Fluid Tile.

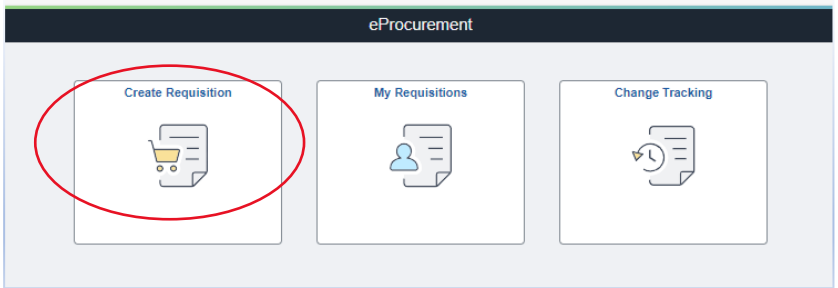
- On the default PeopleSoft Home/Fluid page, select the **eProcurement** Fluid tile.



Step 2: Select the Create Requisition Fluid Tile.

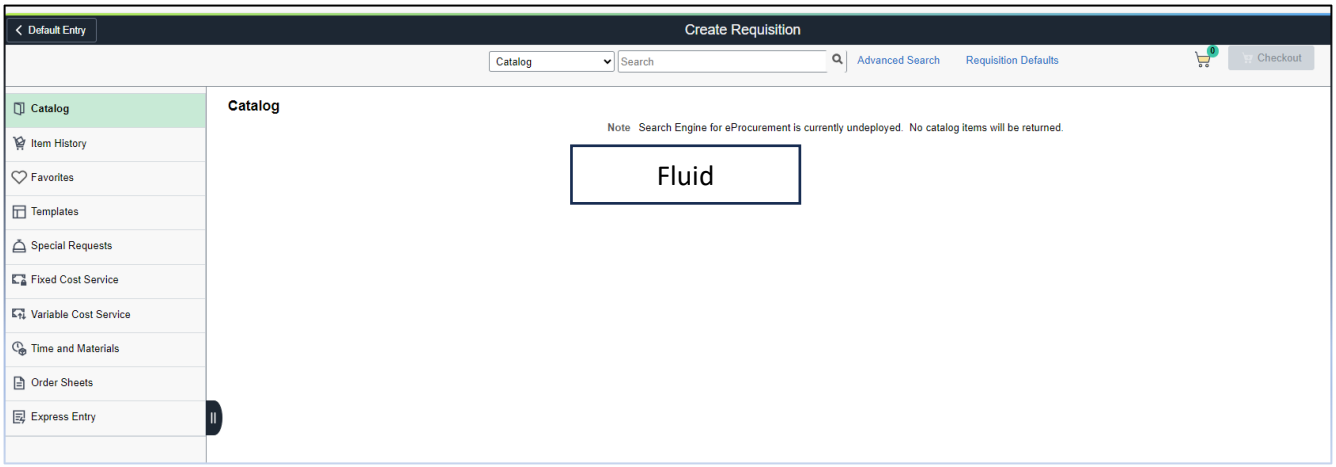
- Select the tile.
- Enter **BU (Business Unit)/Requester** and select **OK**.
- The **Create Requisition** page displays.





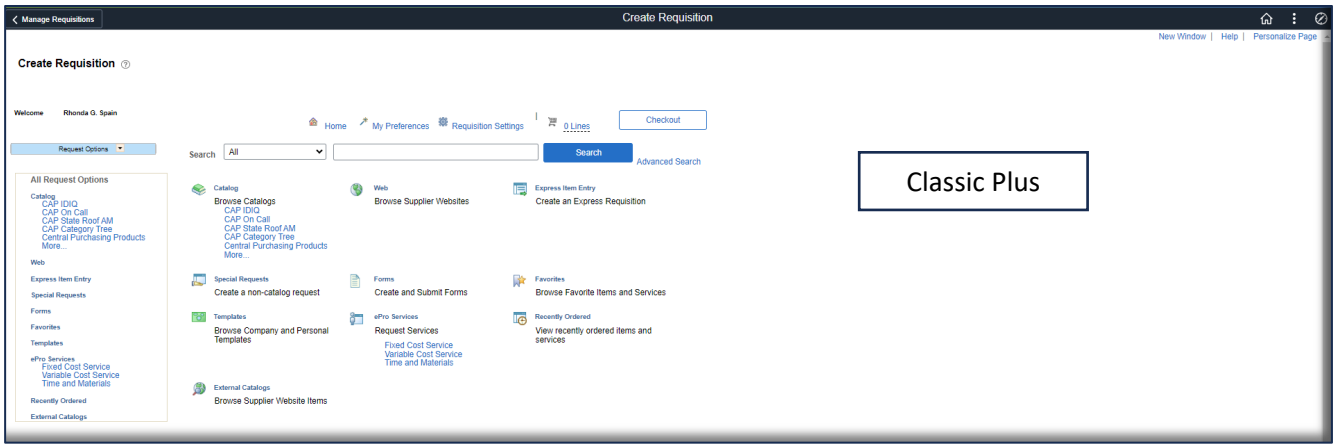
Flag Modifications

Create Requisition page (Fluid view).



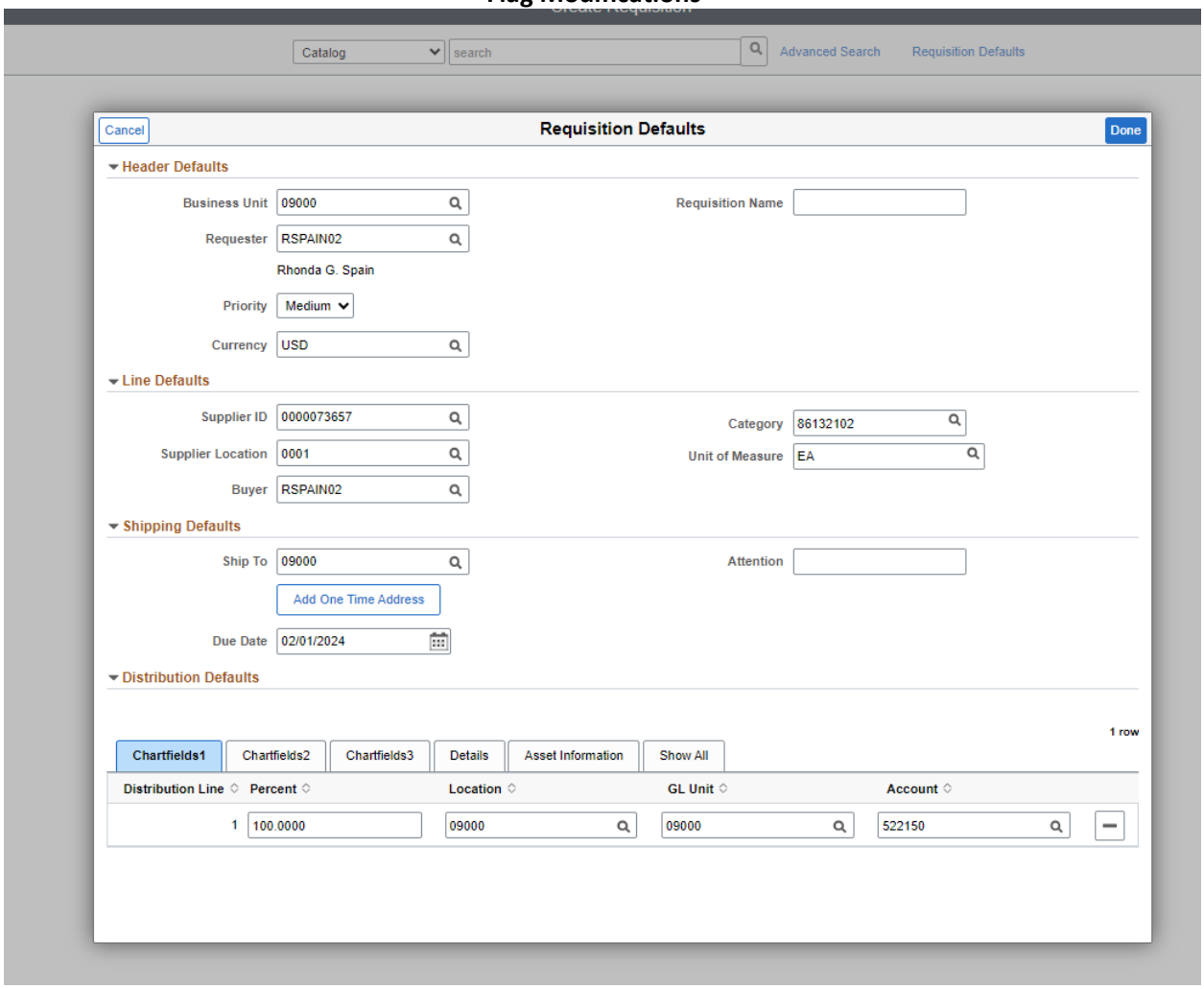
VS.

Create Requisition page (Classic Plus view).

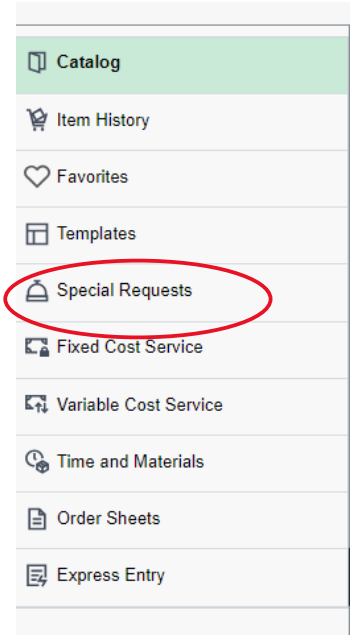


- If requisition will contain multiple lines with the same header, line, shipping defaults and distribution defaults, you may select the **Requisition Defaults** hyperlink to populate data in each available field.

Flag Modifications



Select to Return to Table of Contents

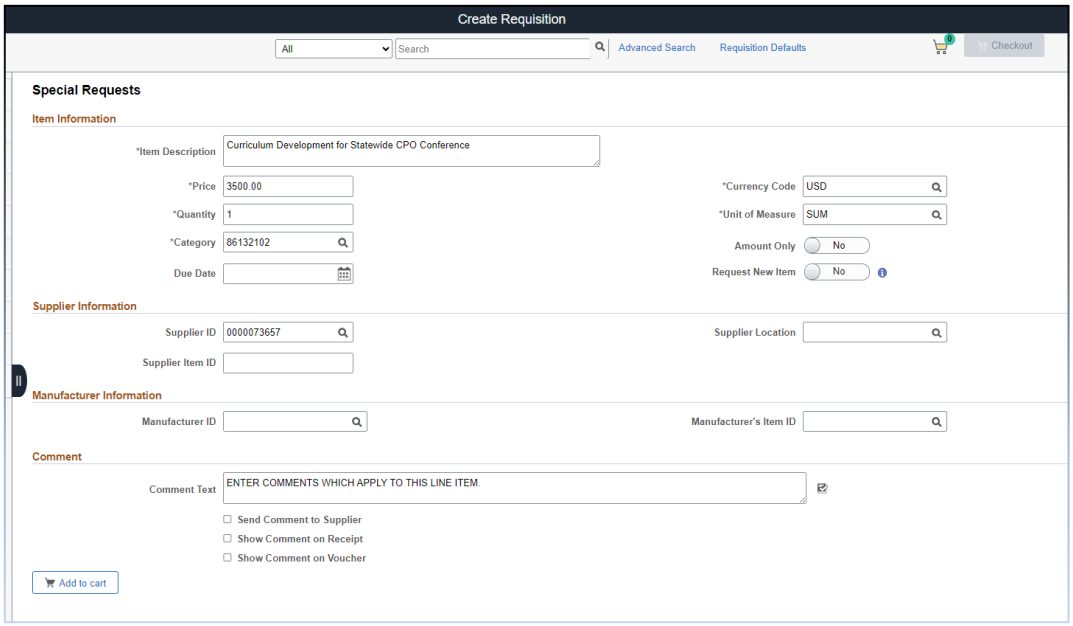


Step 3: Select Request Type and enter the request details.

There are different request types available to create a requisition from the header page of Create Requisition. In this example, **Special Requests** (non-Catalog item) will be selected.

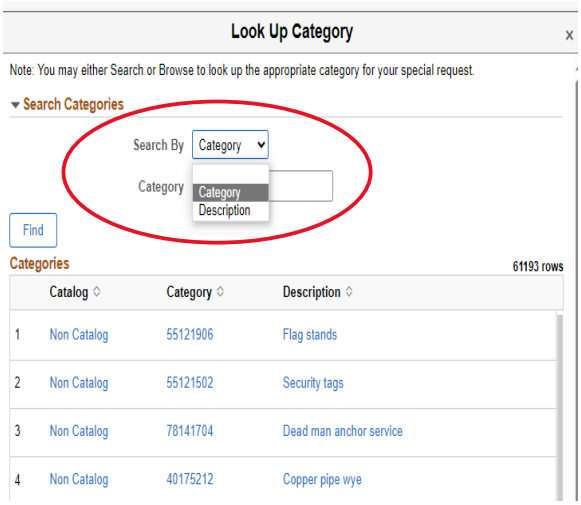
- Select **Special Requests** in the left side pane.

Notice any information which was entered in the Requisition Defaults page auto populates.



- Enter required information (denoted by *) if not entered in **Requisition Defaults** page.
  - Enter the ***Item Description** – Describes the item being acquired and populates the requisition on the line at Checkout. Provide as much detail as possible.
  - Enter ***Price**.
  - Enter ***Quantity**.
  - Supplier ID.
  - Enter ***Unit of Measure** – Use the lookup icon to select from the UOM list provided.

- Due Date.
- Enter the eight-digit ***Category code.** To search for a category code in PeopleSoft:
  - Select the **Lookup** icon to begin search.
  - The Lookup Category dialogue box opens.
  - Search by **Category** or **Description.**
- Select **Amount only** if applicable.
- Enter any additional information.
  (Enter comments that apply to the line item.)
- Select **Send to Supplier**, **Show at Receipt** and **Show at Voucher** as applicable.



SEND TO SUPPLIER – Select **yes** if you want comments to appear on POs that are dispatched to suppliers. If the comments are for internal use only, leave the check box clear.

SHOW AT RECEIPT – Select if you want comments to appear on the receipt documents.

SHOW AT VOUCHER – Select if you want comments to appear on the vouchers.

Step 4: Add Item to Cart and Checkout.

- When all information has been entered, select the **Add to cart** button at the bottom of the page to add the line item to the shopping cart.
- Continue to add line items if applicable by repeating the above steps.
- Notice there is one item in the cart now.
- Select the **Checkout** button in the top right corner of the page.

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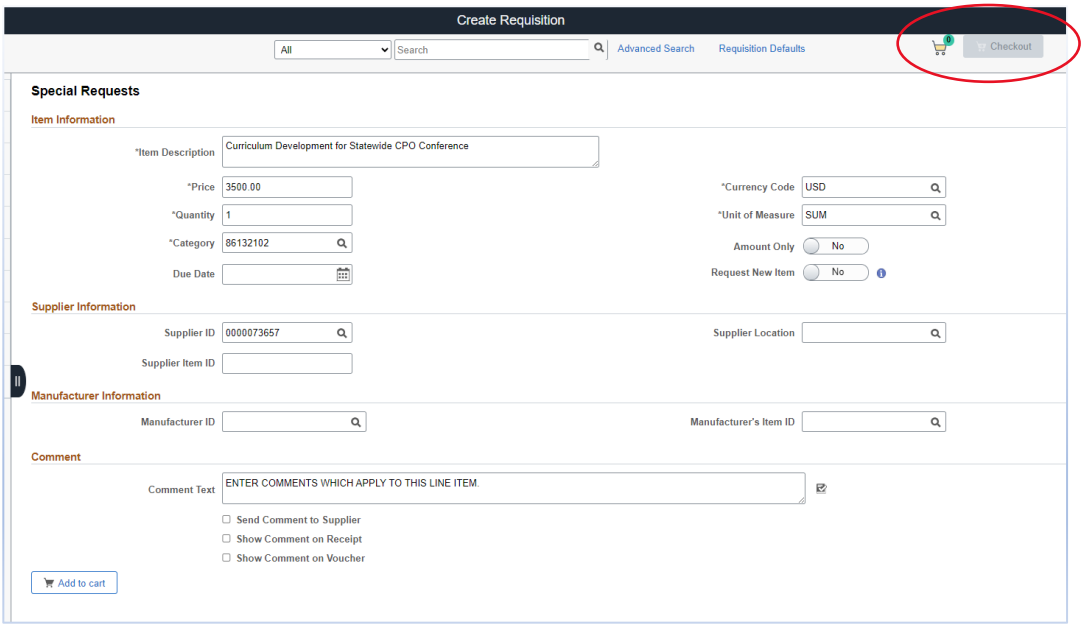

Step 5: Complete Steps in the Review Requisition Summary.

5.1 Enter Justification Comments.

- Review Requisition Summary and enter any approval comments in the Justification Comments box. (e.g., 2024 Renewal of Maintenance for XYZ software licenses.)

5.2 Upload Required Attachments.

- Under the Requisition Lines Overview section, select the **Line Comments** link under the Line Number to upload required attachments.

> To expedite requisition approvals, be sure to attach all required documents as detailed in the PIM: PeopleSoft ePro Requisition Required Attachments relating to required attachments in PeopleSoft. This PIM can also be located in the Purchasing Reference Guide.

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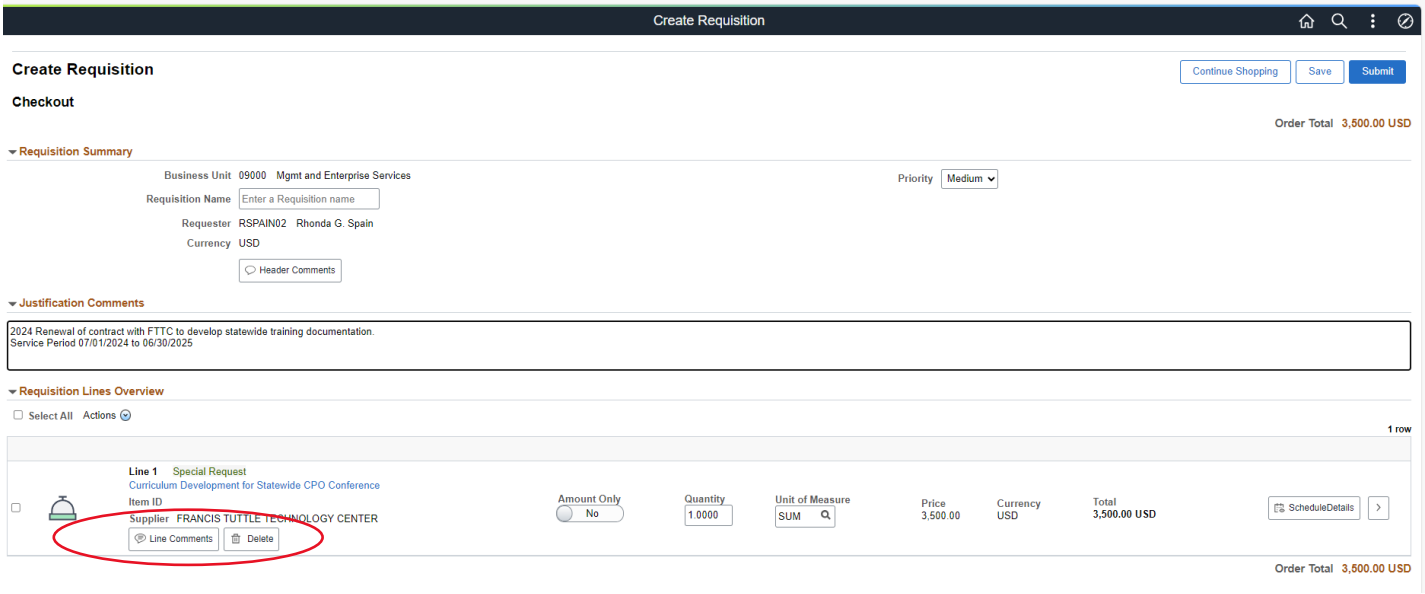
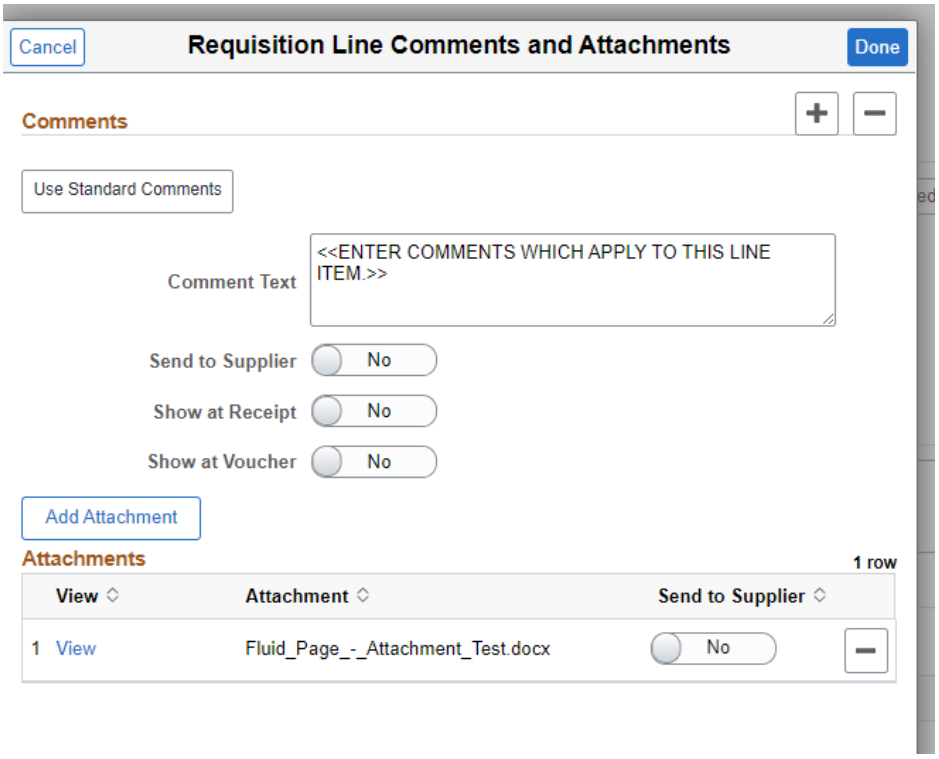
Flag Modifications





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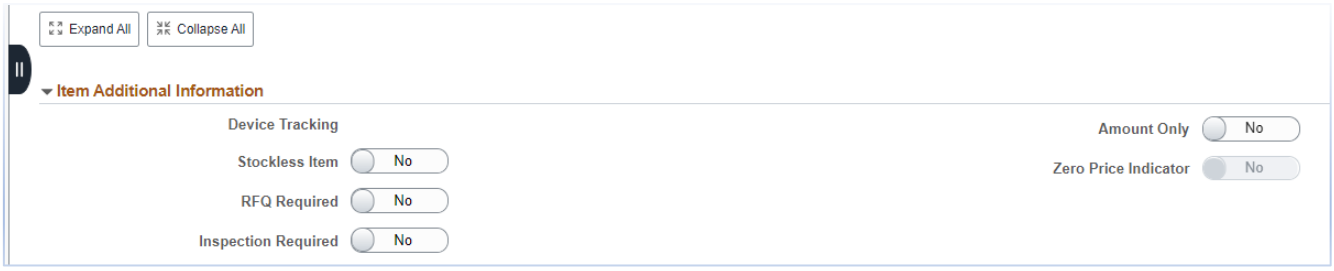
5.3 View and Verify Line and Schedule Details.

- Under the Requisition Lines Overview section, select the **right pointing arrow** shape [>] to view the Line Details and Schedule Details (next to the **Schedule Details** Button.)

5.4 Line Details Tab – Location to Select Exemption Flag (Detailed in Select Flags section below).

- Under the Line Details tab, if the acquisition is exempt, select the **Sole Source**, **Statutory Exemption Flag** or **Contract Release Flag**.
- Physical Nature – Defaults to Goods. Select **Service** if applicable.
- Change Buyer information if applicable.
- Expand the Item Additional Information section and select options as needed (e.g., Amount Only or RFQ Required.)



5.5 Schedule Details Tab – Verify Item Summary, Schedule and Distributions.

- Under the Schedule Details tab, verify Buyer, Ship To, Address, and all ChartFields information is correct.
  - Enter/Verify ChartFields 1.
    - Location.
    - Quantity.
    - Percent.
    - GL Business Unit.

  - Enter/Verify ChartFields 2 and/or ChartFields 3.
    - Account.

    Note: Account ChartField should start with 5 (e.g., 531110) when creating requisitions. An account starting with 5 denotes an expense account.

    - Oper Unit.
    - Fund: Always 1000.
    - Dept.
    - Program.
    - Class-Funding.
    - Bud Ref.

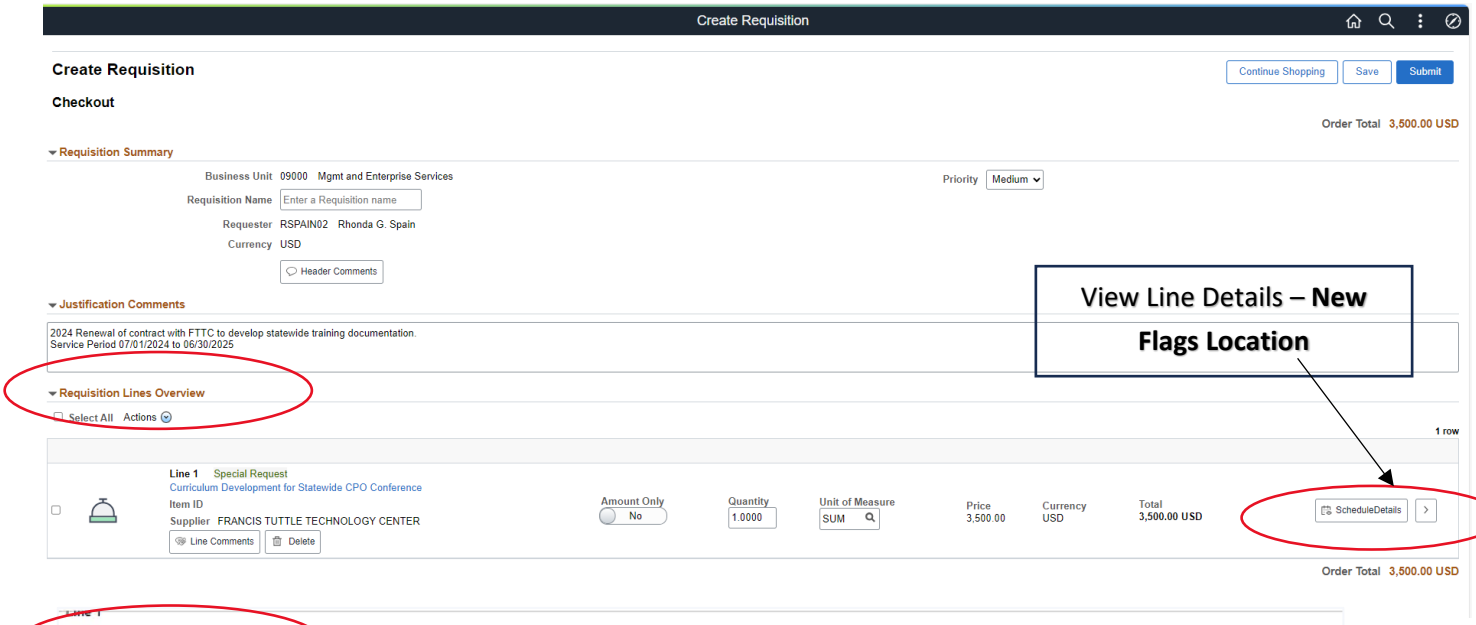
- Verify **Distribute by Amount** or **Quantity** is selected.

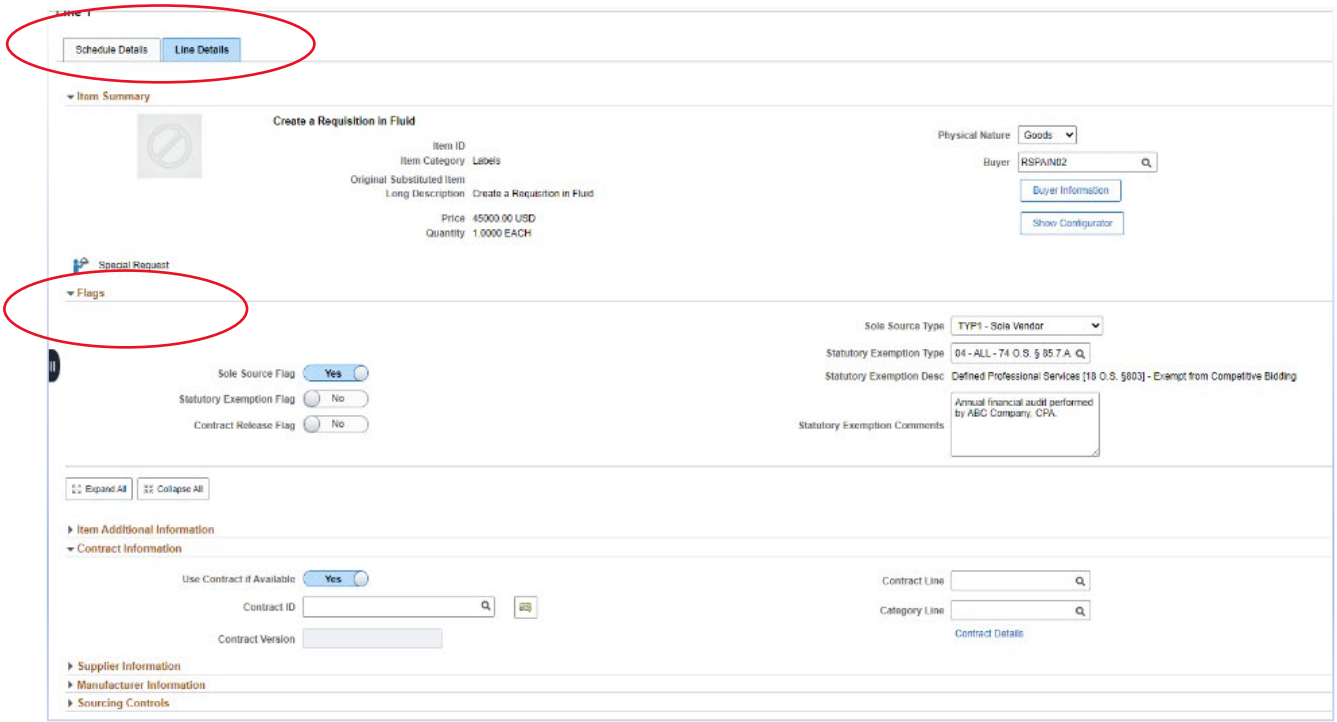
Flag Modifications

- This will determine how the funding will be allocated. Quantity will default and, if needed, will need to be changed to Amount. You cannot partially source REQ to a PO when distributing by Amount.

5.6 Select **Done**.

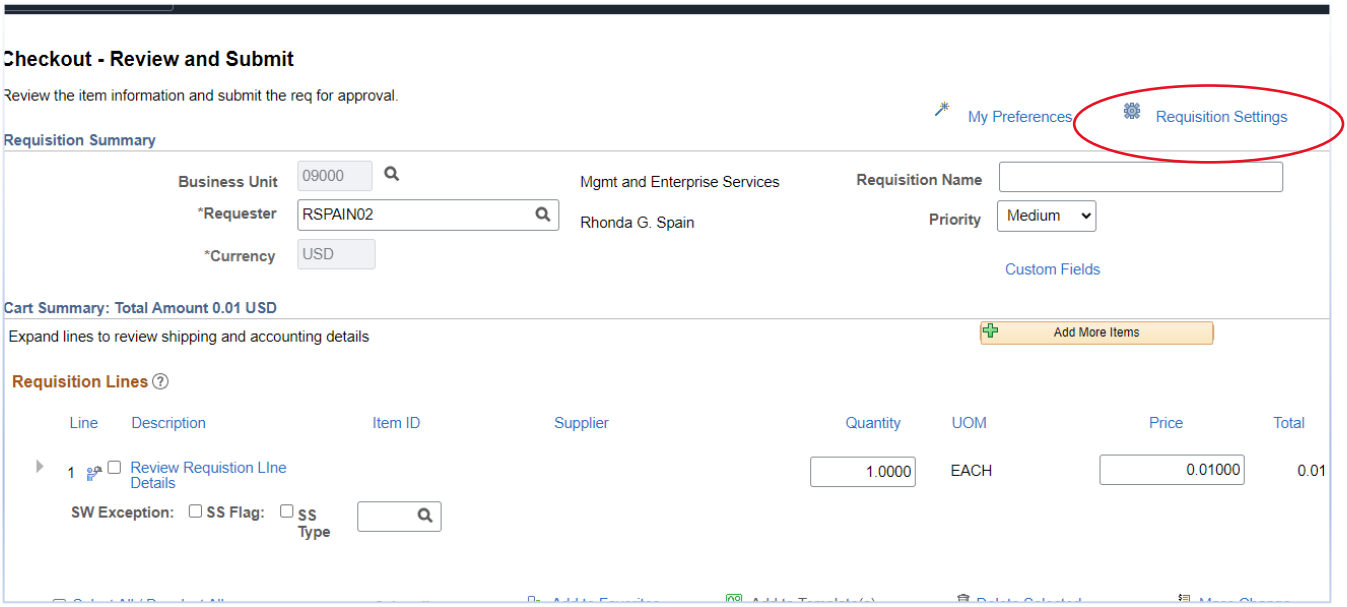
- Repeat steps above until all line items are entered/verified.
- Once completed, select the **Done** button.

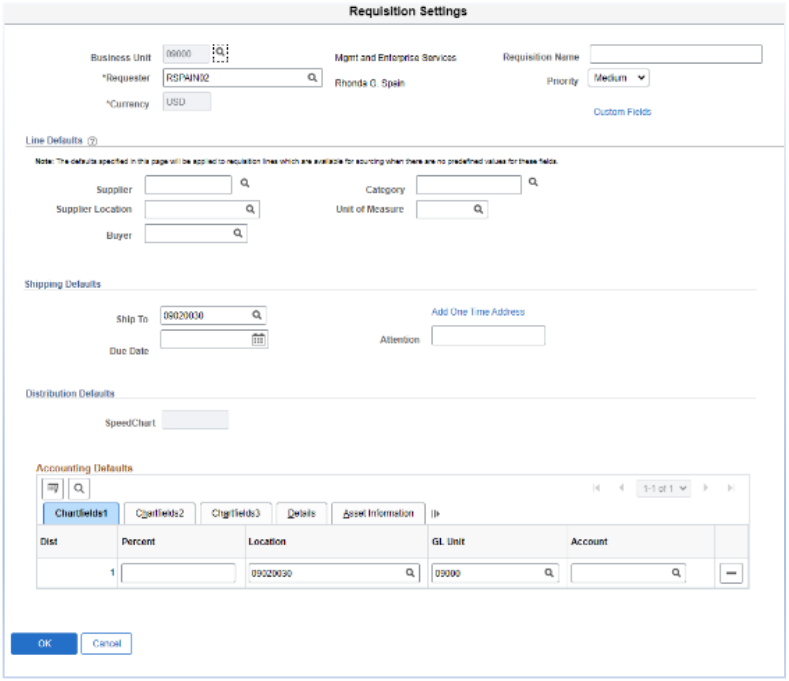




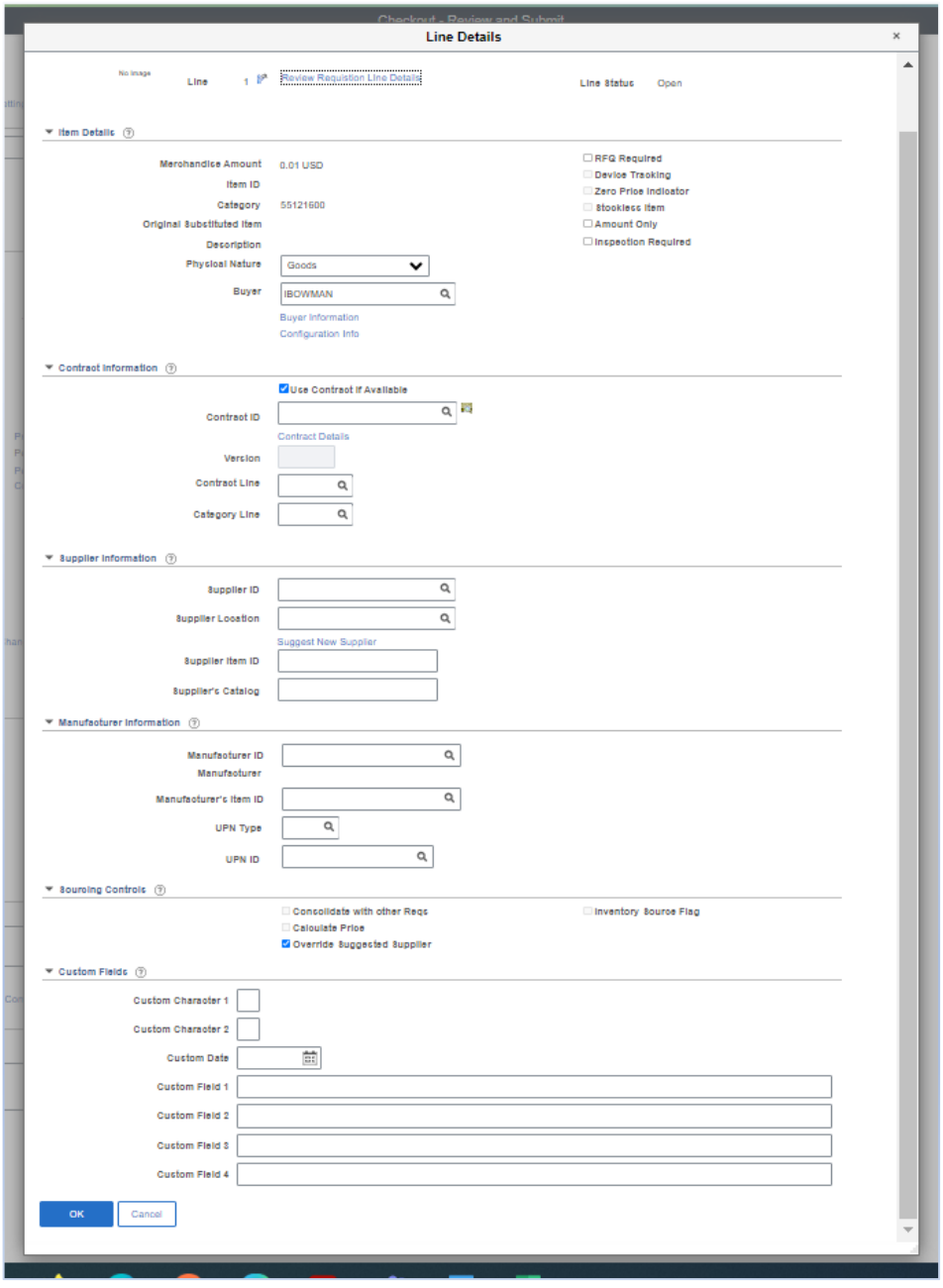
Flag Modifications

Classic Plus View
Requisition Settings





Classic Plus View
Schedule Details



Classic Plus View
Line Details

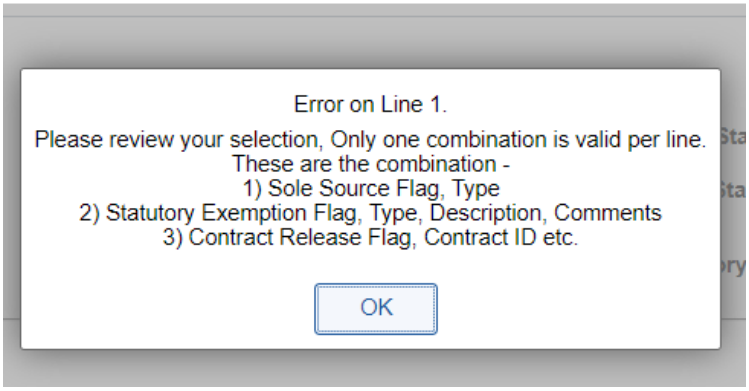
Step 6: Select Flags (if applicable).

On the Requisition Line Details page, there is a new, mandatory Flags section for requests which are exempt from the Central Purchasing Act 74 O.S. § 85.12 by either:

- Sole Source Flag.
- Statutory Exemption Flag (statute must be provided).
- Contract Release Flag (release from a statewide contract).

Flag Modifications

- Only one type of exemption can be selected.
- If information is entered incorrectly, this error message will display.



6.1 Sole Source Flag.

- For a sole source request, select the flag and it will change to **Yes**.
- Select the sole source type.
- Be sure to attach the required documents for sole source.
  - A Sole Source Certification Form (OMES-FORM-CP-002).
  - A Non-Collusion Certification (OMES-FORM-CP-004).
  - Contract terms and conditions (state's general terms for non-IT and both the general and IT terms for IT acquisitions.)
  - Certificate of Insurance.

Sole Source Acquisition Summary Information.

Sole source acquisition is a method a state agency may utilize in acquiring goods and services outlined in Section 85.44D.1 of Title 74 of the Oklahoma Statutes and OAC 260:115-5-13.

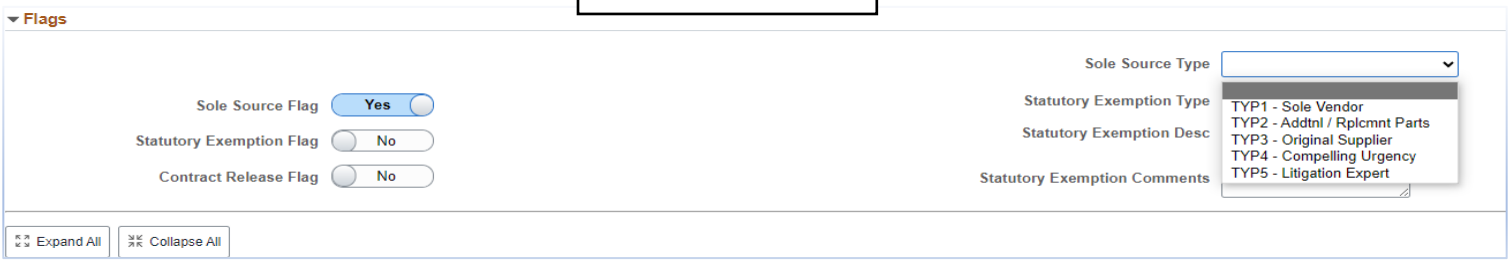
A competitive bid for goods and services is the preferred method of acquisition. The competitive bid offers the best value for the State of Oklahoma while also affirming whether a product or service is, in fact, a sole source.

The sole source types have been redefined and only include true sole source types. There are now only five types of sole source; previously there were eight.

- Eliminated types**:** Sole Make/Model/Brand and Brand Name for Resale.
- Statute Authorization and Statewide Exception now have their own flag sections.

Flag Modifications

Fluid View - New



Sole Source Acquisition Guidelines

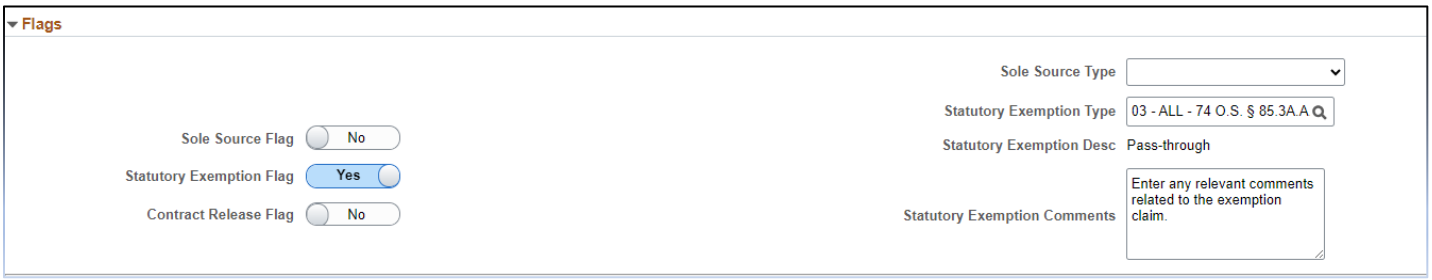
Code	Reason for Sole Source	Certification must clearly:
1	Market research clearly shows there is only one responsible supplier and it can be demonstrated that no other supplies or services will satisfy agency requirements.	State why the specified makes, models or unique services are absolutely essential to the agency's requirements and explain what market research was accomplished to clearly establish that only one supplier can provide the supplies or services, and whether it is copyrighted material.
2	Requirement is for additional units or replacement parts of specified makes and models of technical equipment and only one vendor is available.	State why the specified makes and models are absolutely essential to the agency requirements, and what market research was accomplished to clearly establish that only one supplier can provide the supplies or services.
3	Agency needs to purchase supplies or services from the original supplier in the case of a follow-on contract because award to any other supplier would result in substantial duplication of costs to the state that would not be recovered through competition, or in unacceptable delays in fulfilling agency requirements.	Provide data, estimated cost and how those costs were derived, extent of delay and impact of delay, and other rationale as to the extent and nature of the harm to the state, i.e., license fee, software maintenance support, custom software. Question: Are same supplier personnel available from the last project to work on this project?
4	Agency has an unusual and compelling urgency for supplies or services and the state would be seriously injured unless the agency is permitted to limit the number of vendors from which it solicits bid/proposals. (i.e., existing software).	Provide data, estimated cost and how those costs were derived, and other rational as to the extent and nature of the harm to the state. (Justification may be prepared and approved within a reasonable time after contract award when preparation and approval prior to award would unreasonably delay the acquisitions.)
5	Agency needs to acquire services of an expert, such as expert services to support a current or anticipated litigation or dispute, involving the state in any trial, hearing or proceeding whether or not the expert is expected to testify. Examples of such services include, but are not limited to, assisting the state in the analysis, presentation or defense of any claim or request for adjustment to contract terms and conditions, whether asserted by a supplier or the state, which is in litigation or dispute, or is anticipated to result in dispute or litigation.	Indicate why the source for expert services is absolutely essential to the state's requirements, thereby precluding consideration of other sources.

6.2 Statutory Exemption Flag.

For a request that is exempt due to a statute, select the flag and it will change to **Yes**.

In the **Statutory Exemption Type** mandatory field, select the **search** icon to display a Lookup page currently with 98 statutory exemption types.

In the mandatory **Statutory Exemption Comments** field, enter a description of the products or services being claimed for the exemption.



> Tip: The Statutory Exemption Comments box can be enlarged to show all text entered by placing your cursor in the bottom right corner of the text field until you see a diagonal double-ended arrow. Drag down to increase the size of the box.

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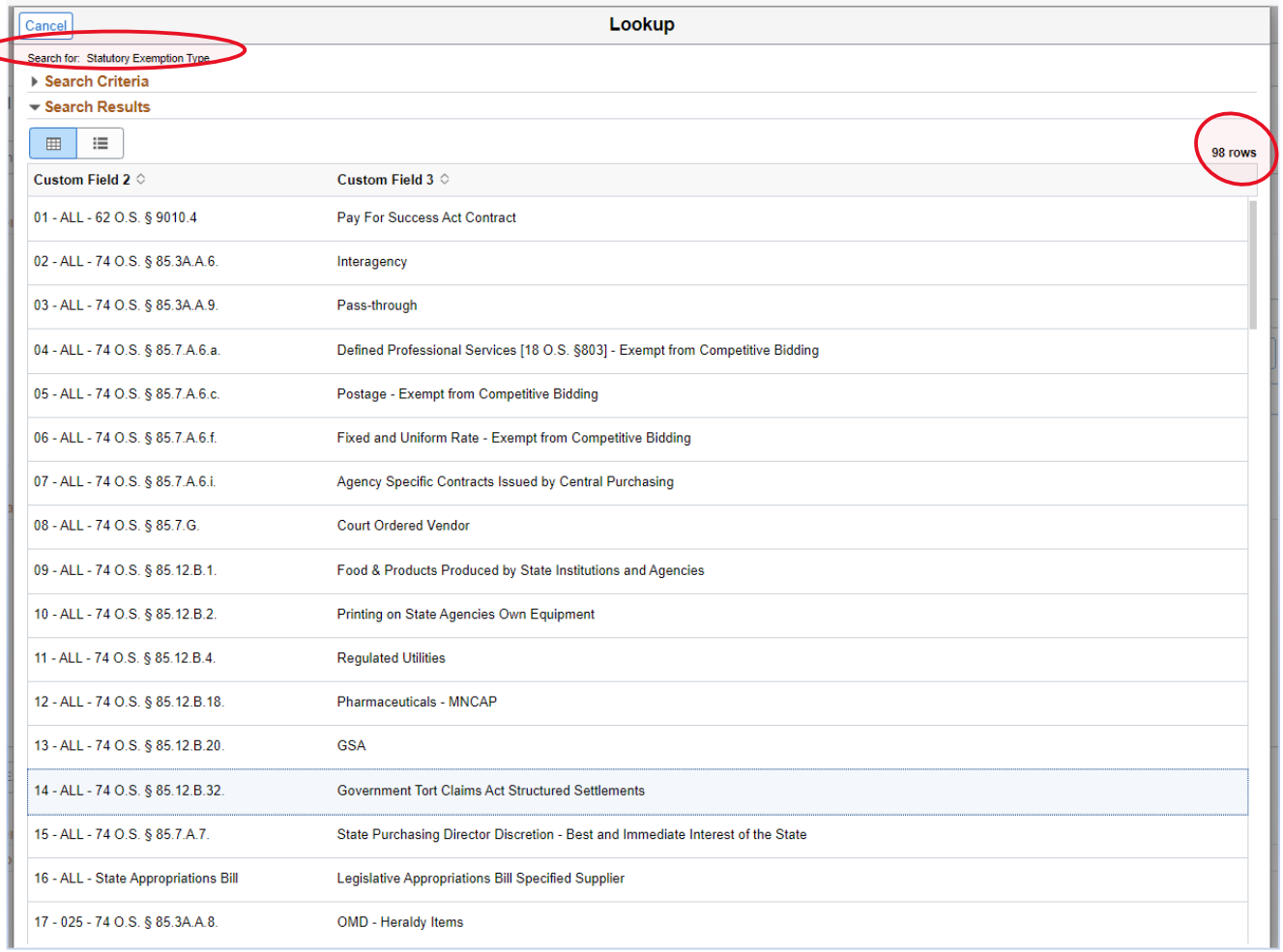
6.2.1 Statutory Exemption Types.



Example verbiage for statutory exemption mandatory comments field:

Statutory Type No. from Table	Statutory Exemption Type Selected	Statutory Exemption Description	Example Comment
02	ALL - 74 O.S. § 85.3A.A.6.	Interagency	Purchase of XYZ per written agreement with agency XYZ.

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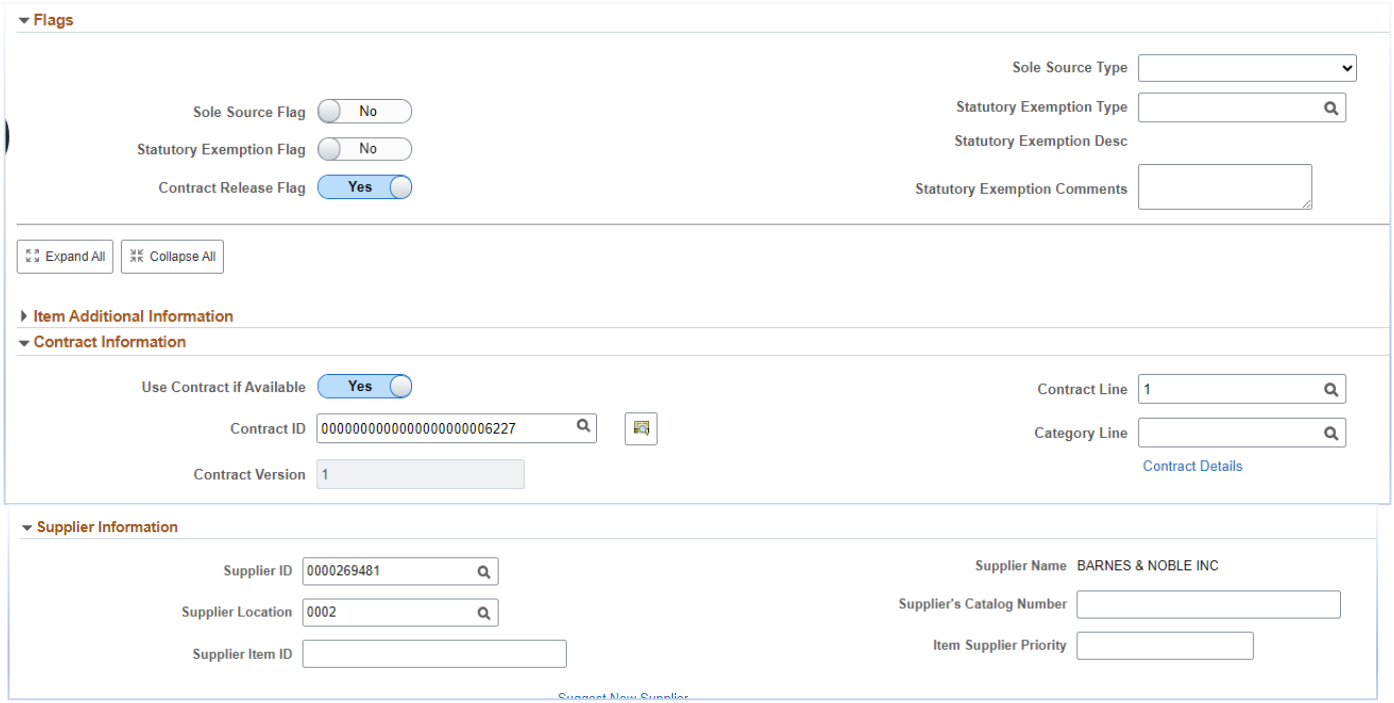
Flag Modifications

04	ALL - 74 O.S. § 85.7.A.6.a.	Defined Professional Services [18 O.S. § 803] - Exempt from Competitive Bidding	Annual financial audit performed by ABC Company, CPA.
07	ALL – 74 O.S. § 85.7.A.6.l	Agency Specific Contracts Issued by Central Purchasing	Agency contract no. XYZ resulting from solicitation no. XYZ.
11	ALL - 74 O.S. § 85.12.B.4.	Regulated Utilities	Electric service from OG&E for XYZ facility.
13	ALL - 74 O.S. § 85.12.B.20.	GSA	GSA Contract No. 47QTCH18D0039 – Required documentation provided.

6.3 Contract Release Flag.

- For an exempt request for a product or service available on a statewide contract release, select the flag and it will change to **Yes**.
- Scroll to the **Contract Information** section of the requisition, then enter or search for the **Contract ID** and **Contract Line**.

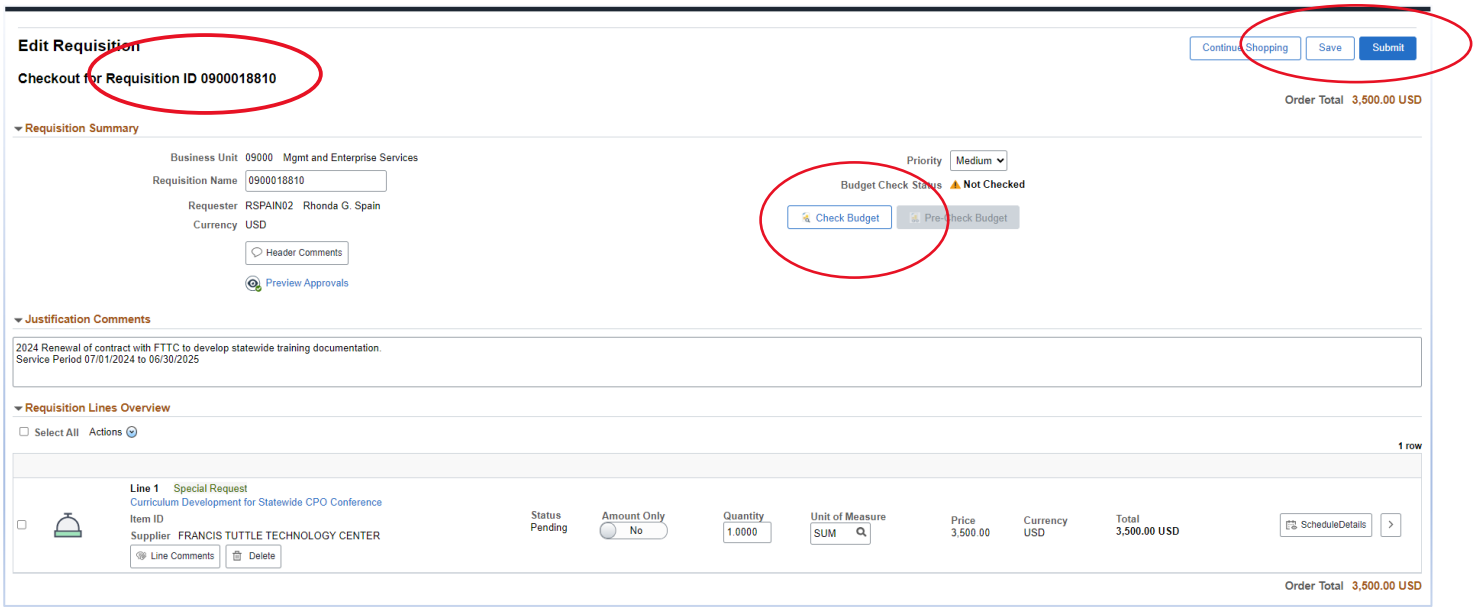


Step 7: Checkout, Save and Submit Requisition.

Once all required information has been entered, you may move to save and submit your requisition.

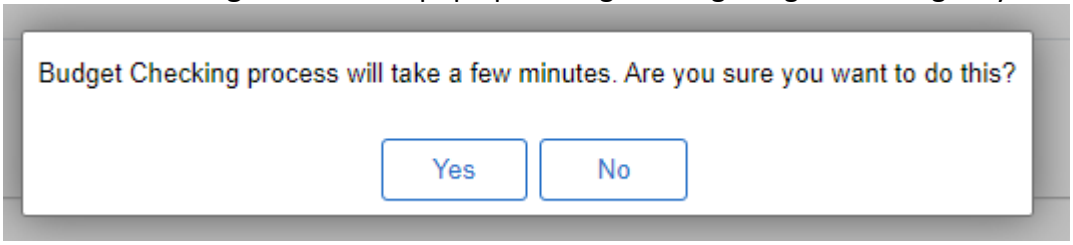
- Select **Checkout.**
- Select the **Save** button and note **Requisition ID**.
- Select the **Checkout** button again.
- Select **Submit**.

Agency Specific Contract releases are no longer entered in the Contract ID field in Line Details as was done in Classic Plus.
In Fluid, select the exemption option, **Agency Specific Contracts Issued by Central Purchasing**, in the statutory exemption type field.



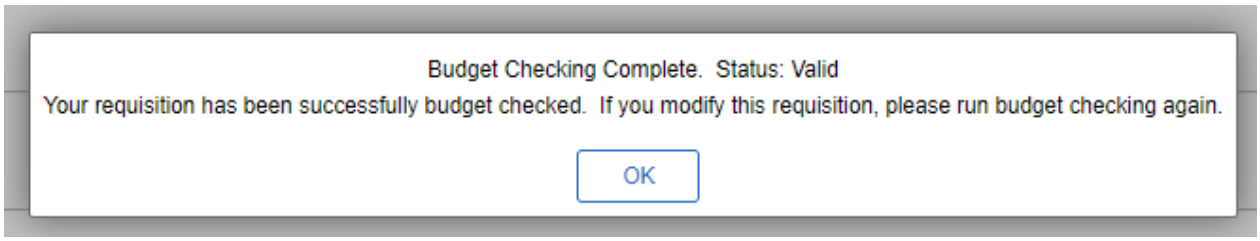
Step 8: Budget Check – Check Status in My Requisitions.

- Select **Check Budget** and **YES** in pop up message stating budget checking may take a few minutes.

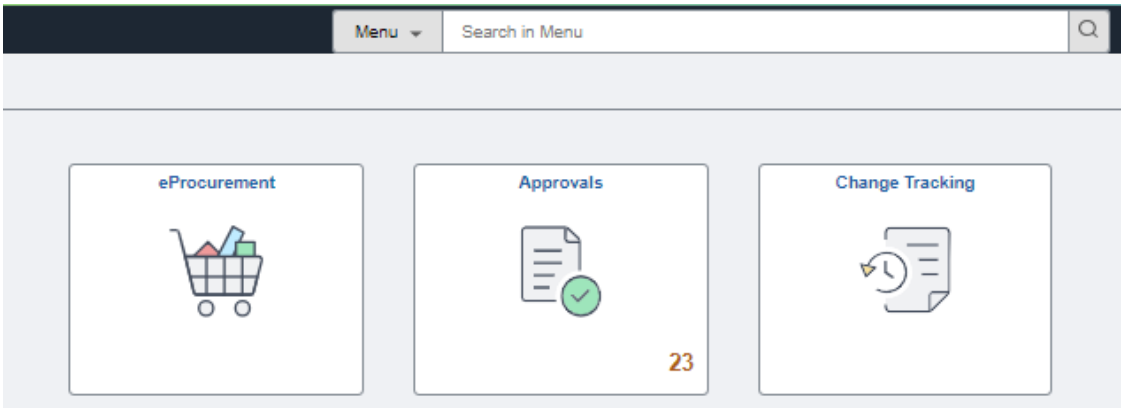


Flag Modifications

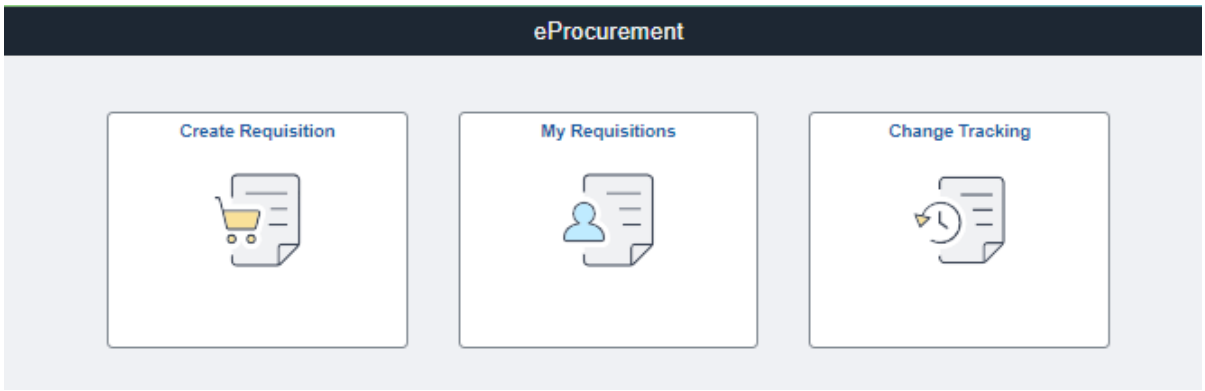
- When budget checking is complete, a dialogue box will appear with the following message:

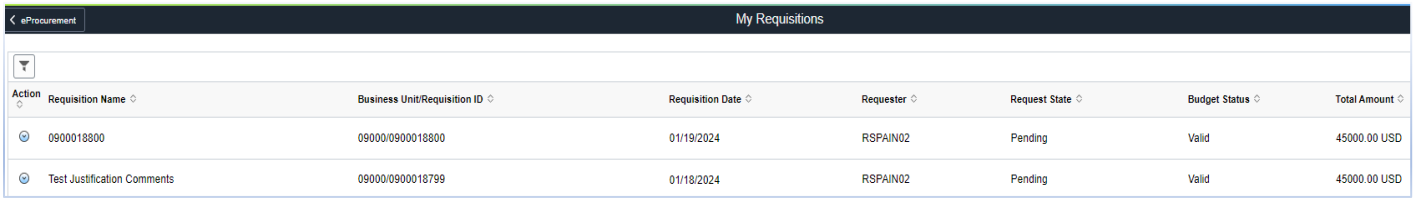


- Select **OK.**
- Select the **Home** icon in the top right of the page.
- Select the Fluid **eProcurement** tile.



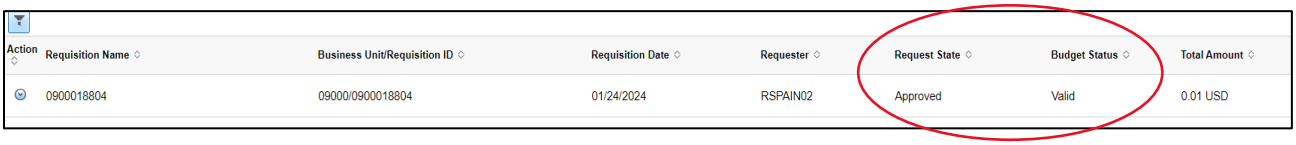
- Select the **My Requisitions** Fluid tile to see **Budget Status is Valid** and **Request State is Pending** (approval).
- Use the **Update Filters** option as shown below if necessary.





Flag Modifications

Once your requisition has completed routing through the approval path and has been fully approved, the Classic Plus view, the view of which you are accustomed, will be used to expedite the requisition to PO.

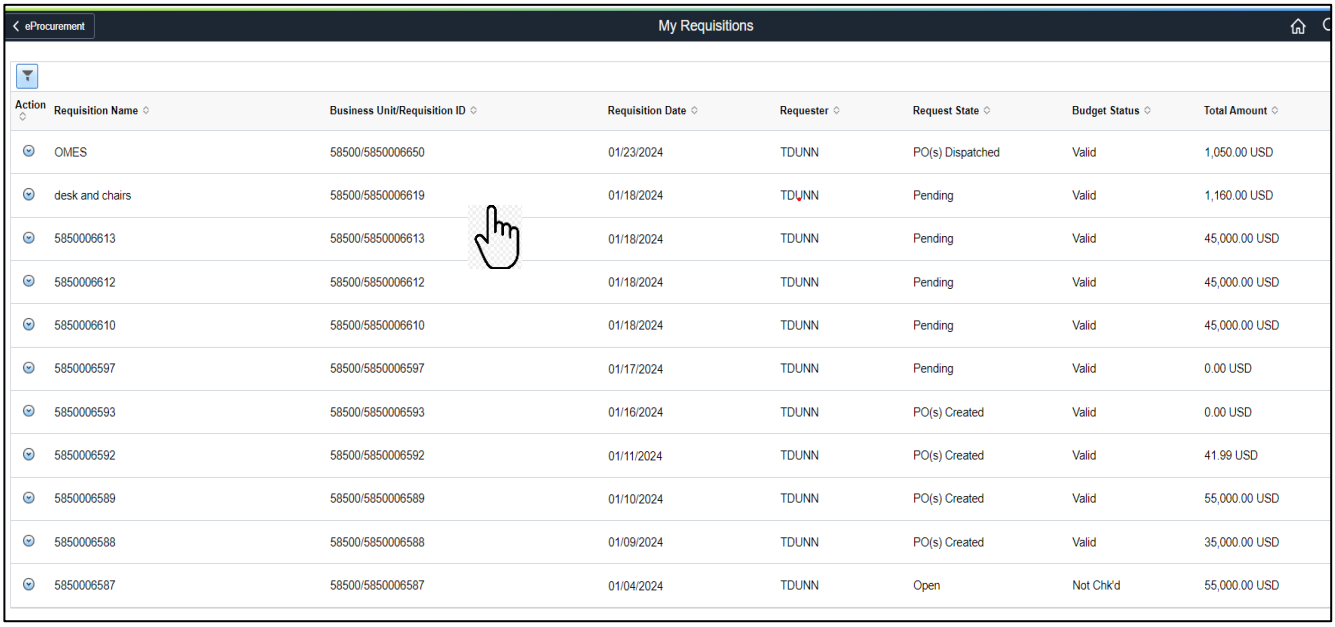


Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	0900018804	09000/0900018804	01/24/2024	RSPAIN02	Approved	Valid	0.01 USD

View My Requisitions – Requisition Lifeline (Lifecycle).

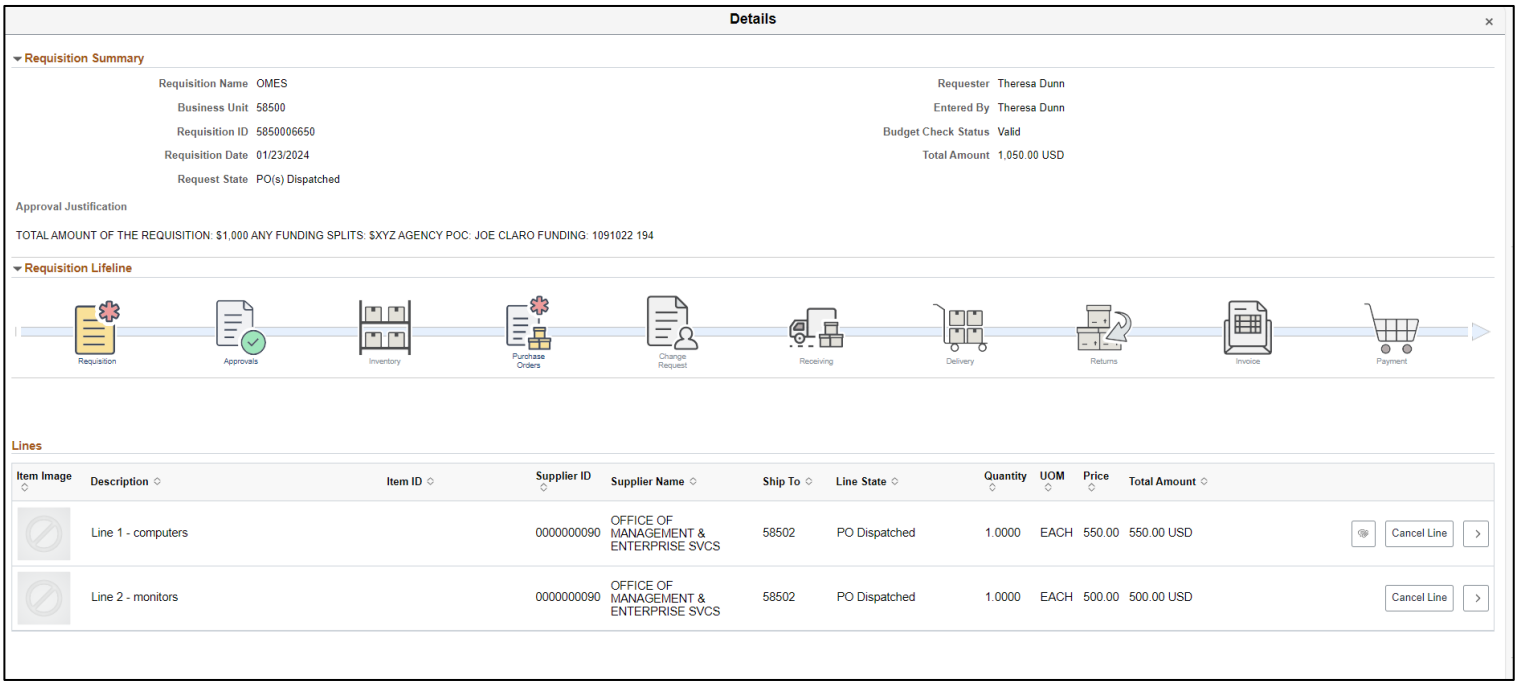
To display the requisition lifeline (lifecycle of an acquisition), navigate to:

- Fluid homepage > eProcurement tile > My Requisitions.
- Select any blank space between any space of a requisition and the **Details** page opens with the **Requisition Lifeline** section.



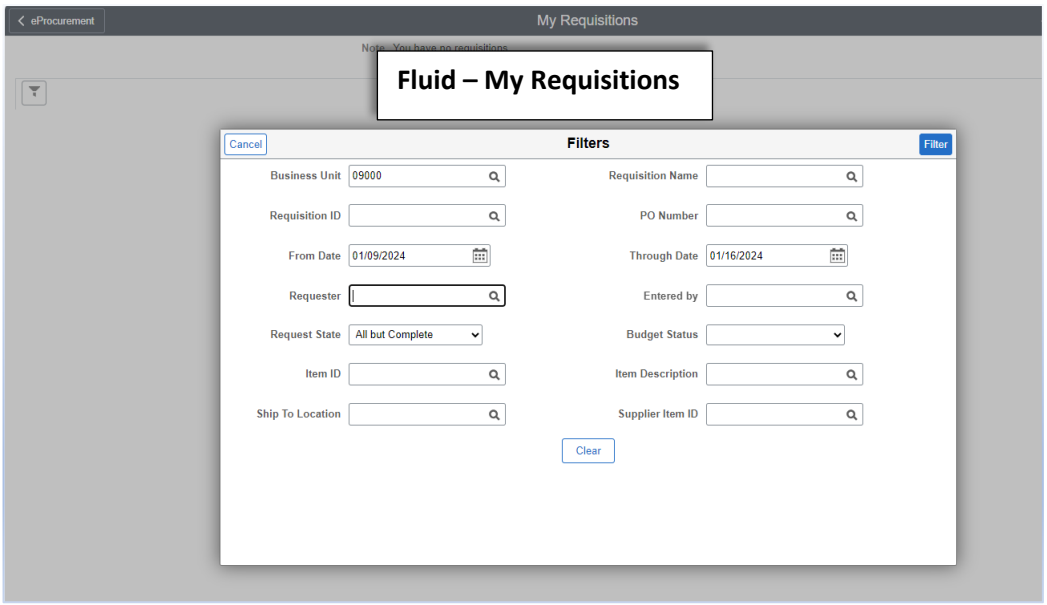
Action	Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
	OMES	58500/5850006650	01/23/2024	TDUNN	PO(s) Dispatched	Valid	1,050.00 USD
	desk and chairs	58500/5850006619	01/18/2024	TDUNN	Pending	Valid	1,160.00 USD
	5850006613	58500/5850006613	01/18/2024	TDUNN	Pending	Valid	45,000.00 USD
	5850006612	58500/5850006612	01/18/2024	TDUNN	Pending	Valid	45,000.00 USD
	5850006610	58500/5850006610	01/18/2024	TDUNN	Pending	Valid	45,000.00 USD
	5850006597	58500/5850006597	01/17/2024	TDUNN	Pending	Valid	0.00 USD
	5850006593	58500/5850006593	01/16/2024	TDUNN	PO(s) Created	Valid	0.00 USD
	5850006592	58500/5850006592	01/11/2024	TDUNN	PO(s) Created	Valid	41.99 USD
	5850006589	58500/5850006589	01/10/2024	TDUNN	PO(s) Created	Valid	55,000.00 USD
	5850006588	58500/5850006588	01/09/2024	TDUNN	PO(s) Created	Valid	35,000.00 USD
	5850006587	58500/5850006587	01/04/2024	TDUNN	Open	Not Chk'd	55,000.00 USD

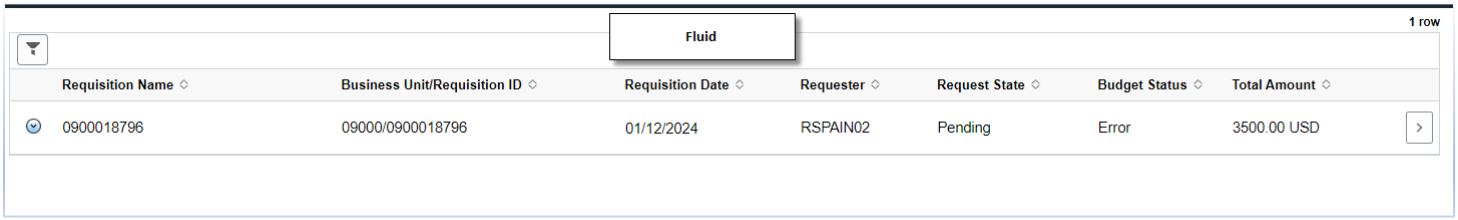
Flag Modifications

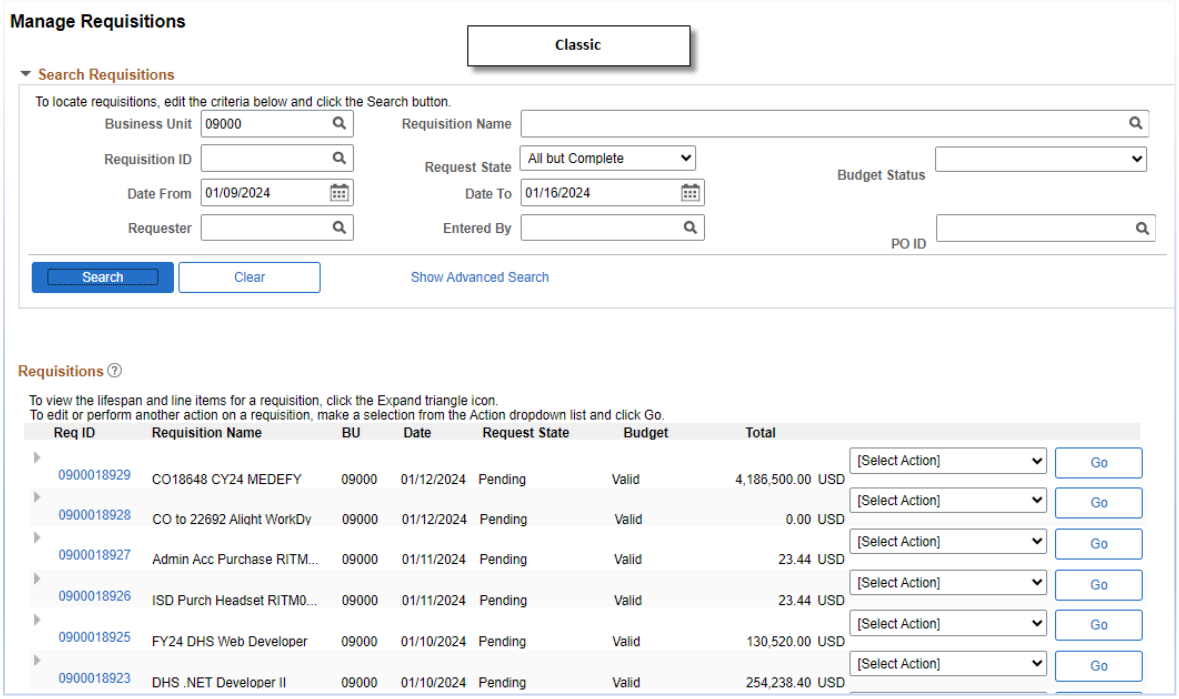


My Requisitions (Fluid) vs. Manage Requisitions (Classic Plus).

- To use the Fluid filter to find requisitions, select the **funnel** in the top left of page.







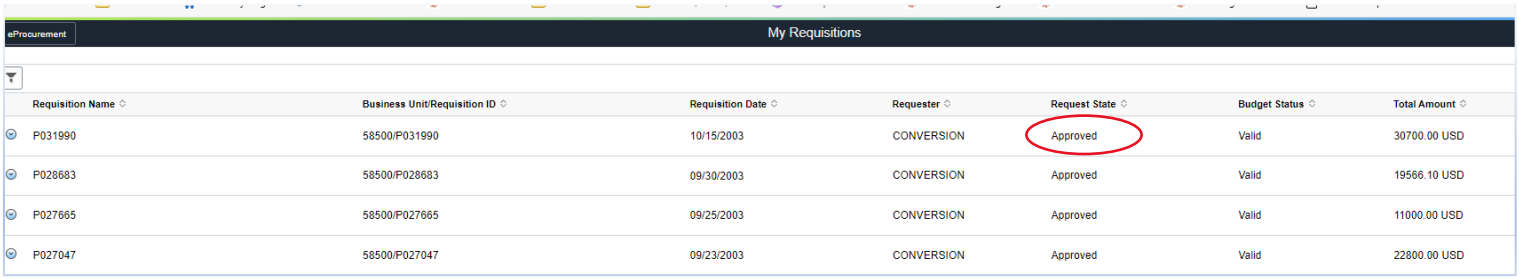
Step 9: Expedite Requisition to PO Using Classic Plus.

Recall with the upgrade to Fluid, some functions still occur in Classic Plus.

New Fluid View	• Requisition creation, editing and review. • Requisition submission. • Budget checking. • Requisition/purchase order approval. • **Approver role – Requisition/purchase order approval**
Current Classic Plus View	• **Expedite requisition to purchase order.** • **Requester – Submit approval and budget check PO.** • Purchase order inquiry. • Dispatch purchase order. • Purchase order add/update.

Flag Modifications

- The diagram below shows the Request State on My Requisitions page is approved; expedite to PO in Classic Plus view.



Step 1: Navigate to Expedite Requisitions in Classic Plus.

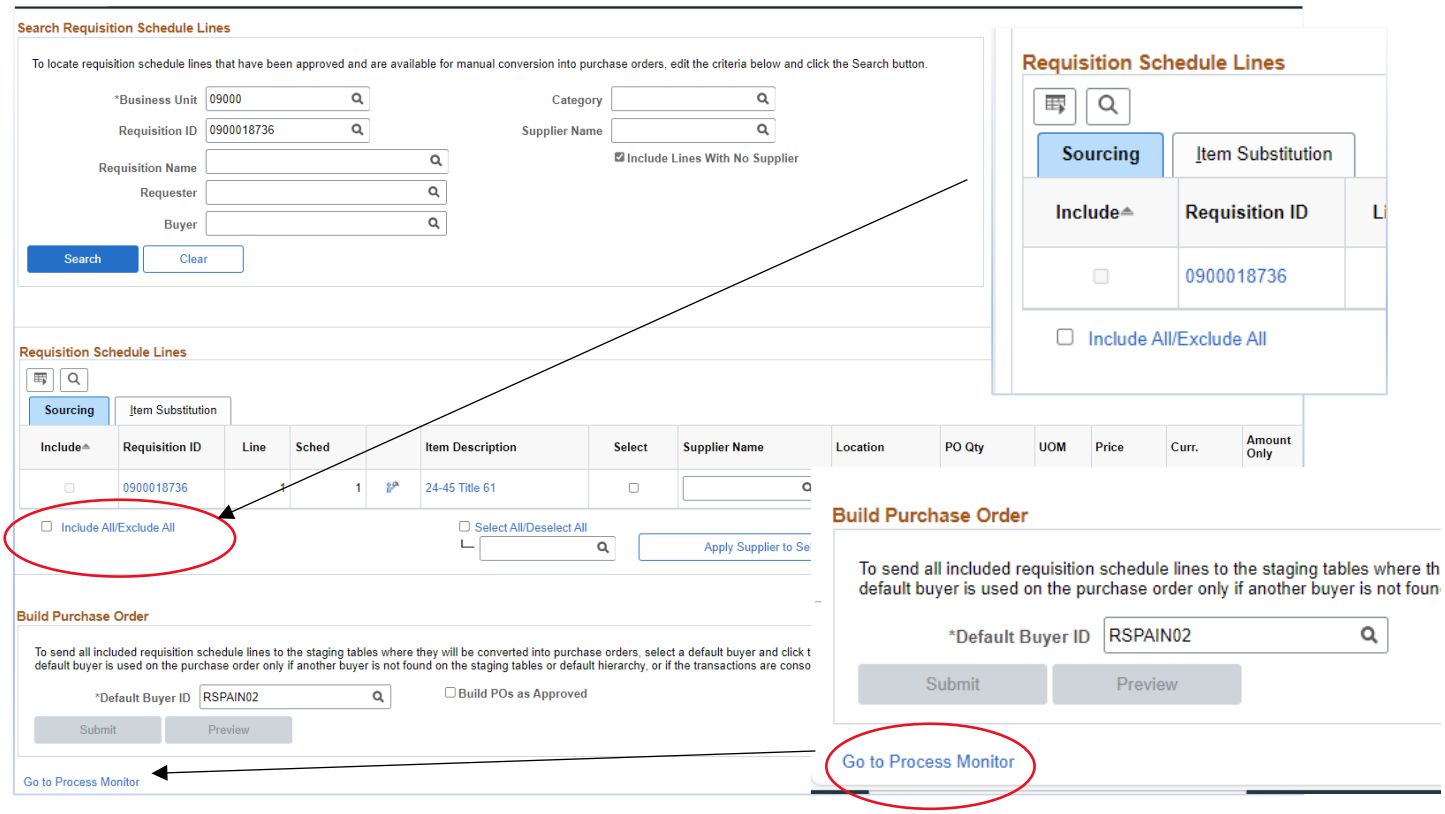
- Select the **Compass** icon at the top right of page.
- Navigation: > Menu > eProcurement > Buyer Center > Expedite Requisitions.
- Alternately, one can choose to select the **ellipsis** (three dots) icon at the top right of page to open the menu and select **New Window in Classic Plus** and navigate to **Expedite Requisitions**.

Step 2: Enter **Business Unit** and **Requisition ID**.

- Select **Search**.

Step 3: Select **Include All/Exclude All**.

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

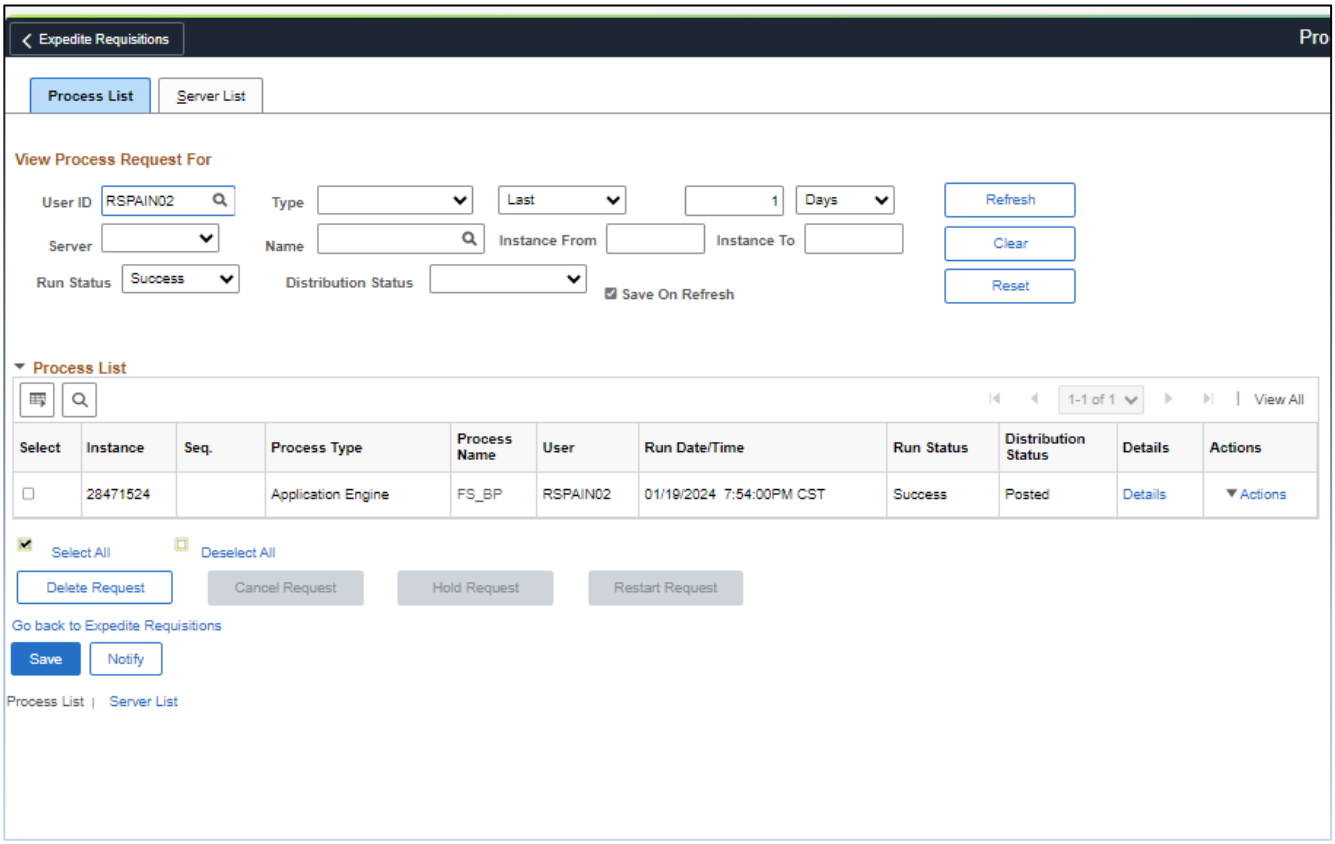


Step 4: Select **Submit.**

Step 5: Select **Go To Process Monitor.**

- The link is in the **Build Purchase Order** box at the bottom of the page.

Step 6: Select **Refresh** until Run Status is **Success**.



Step 7: Navigate to **Sourcing Workbench**.

- Enter **BU**, **Req ID#** or your **Process Instance ID#** from prior step and select **Search**.

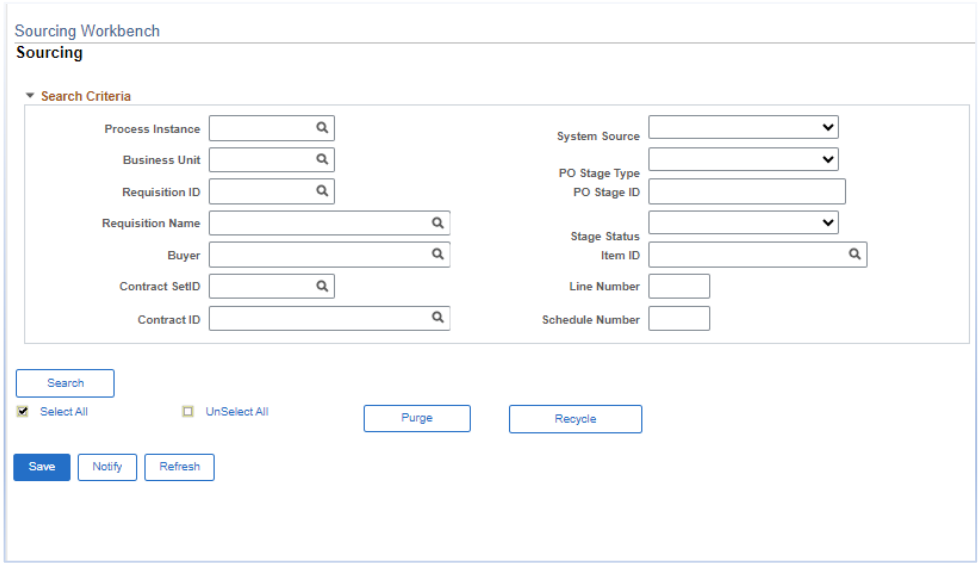
Select to Return to Table of Contents

Flag Modifications

Navigation:

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

- In Search Results, Requisition ID No. displays along with PO ID No.



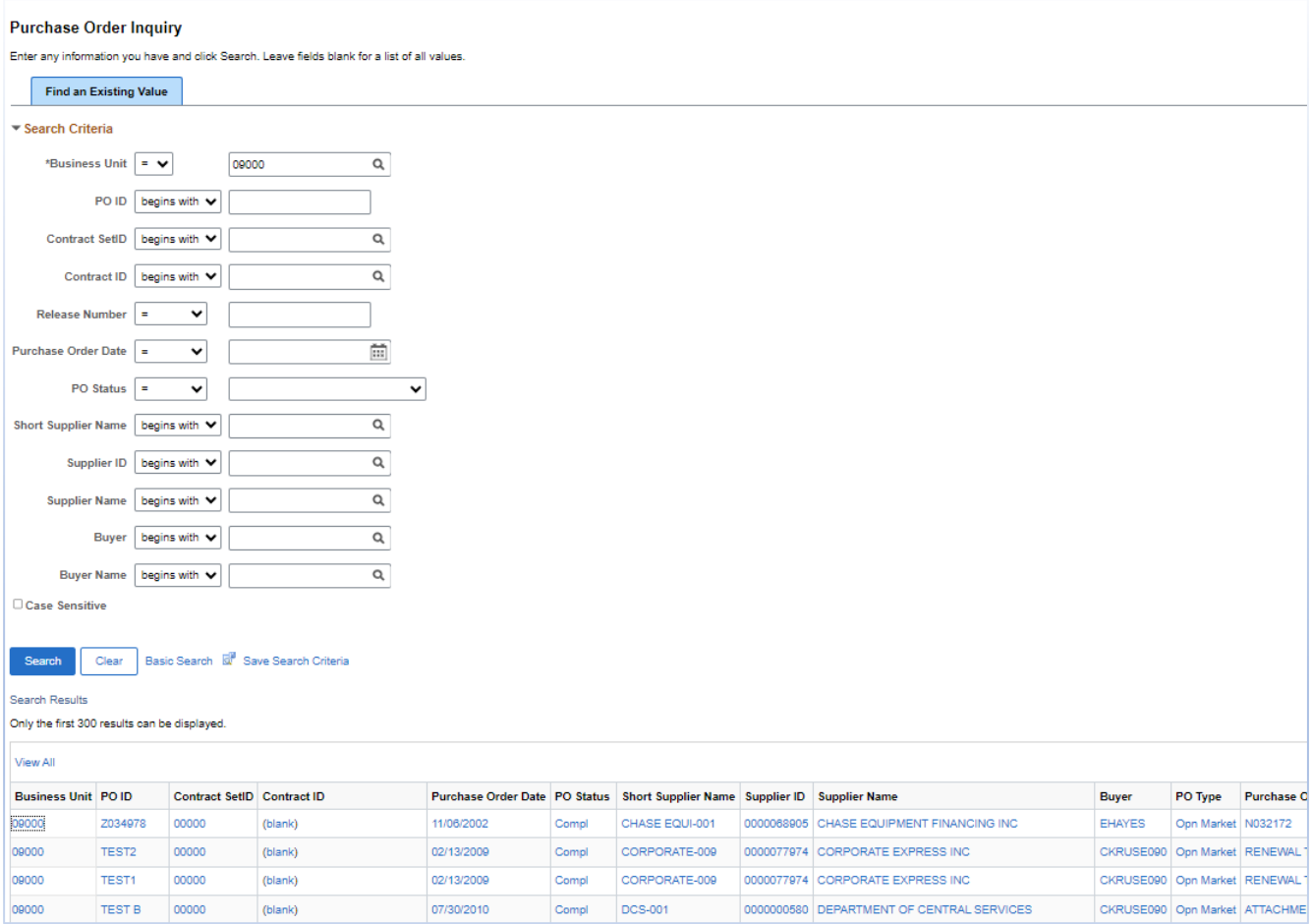
Step 8: Select the **PO ID hyperlink**.

- Make note of the **PO ID No**.

Select to Return to Table of Contents

Step 9: Purchase Order Inquiry – Review PO Information.

Optional step – Navigation: Menu >Purchasing > Purchase Orders >Review PO Information > Purchase Orders



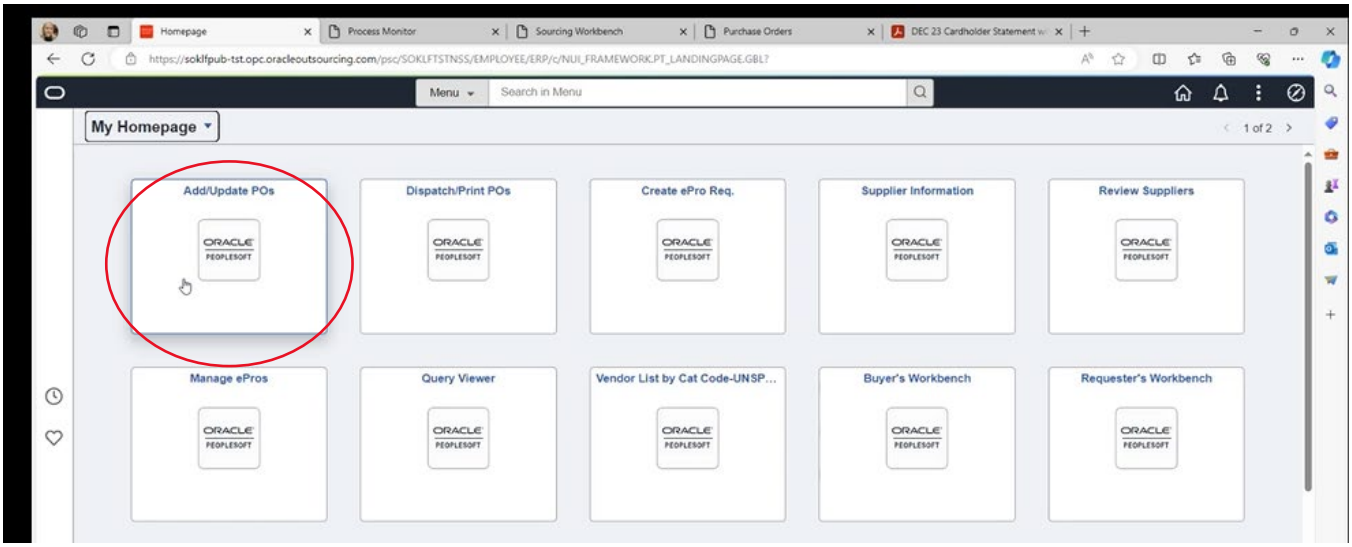
Step 10: Submit PO for Approval and Budget Check.

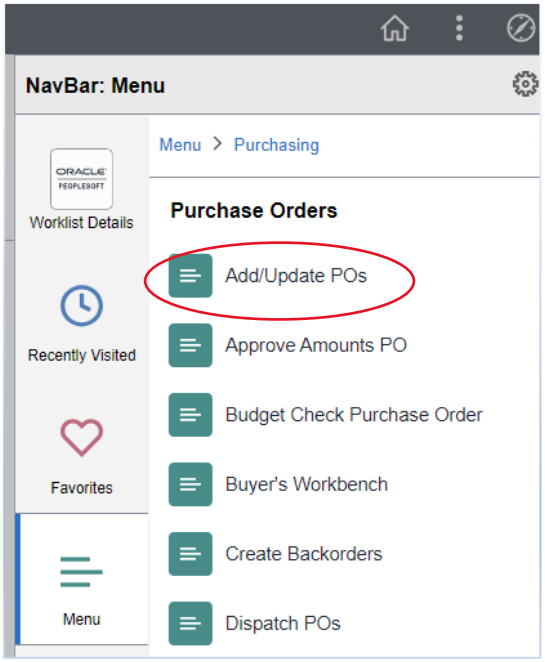
10.1 Navigate to **Add/Update PO** and locate your PO.

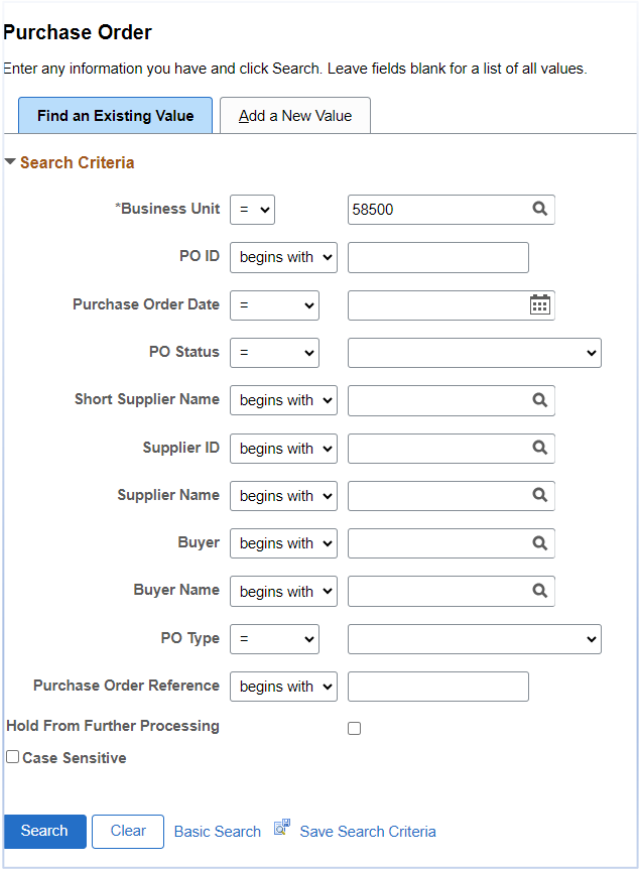
Navigation: Menu > Purchasing > Purchase Orders > Add/Update Pos.
Alternately, if you created the Add/Update tile in Classic Plus on your homepage, you can select the tile.

Select to Return to Table of Contents

Flag Modifications





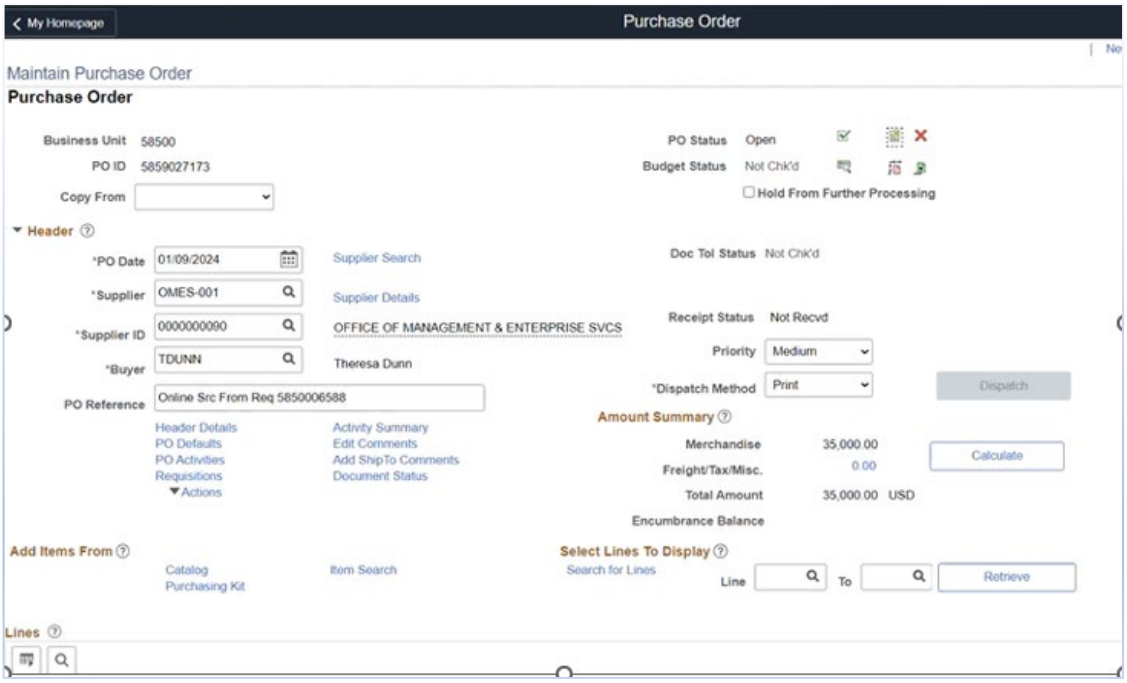


10.2 Requester Submits PO for approval.

The PO is built in an open status as shown in the illustration below.

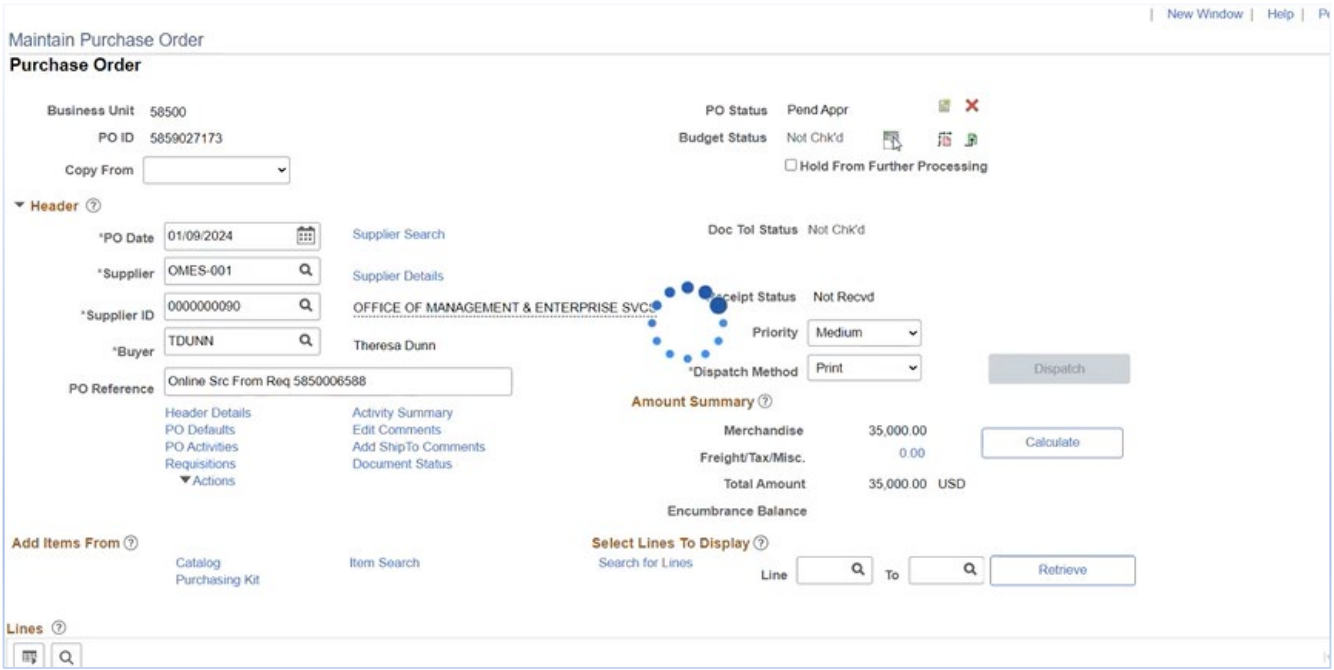
- Select the **check box** next to **PO Status** to submit for approval.

Flag Modifications



10.3 Budget Check.

- When the PO Status is Pending Approval, budget check by selecting the **box next to Budget Status**.



The budget checking is complete when the budget and document tolerance status are valid.

10.4 Purchase Order Approval in Fluid.

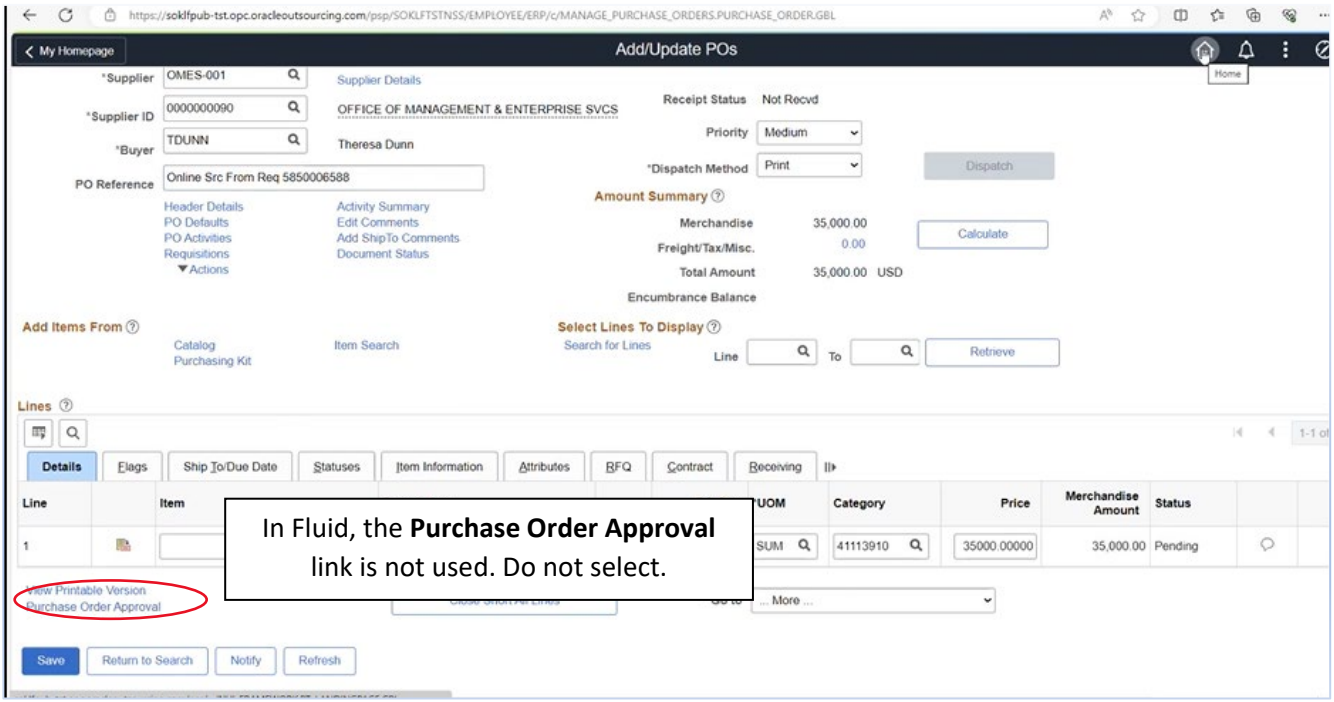
Building, editing, submitting and budget checking a PO will still be performed using the Classic Plus version of PeopleSoft.

For approving you cannot approve the way you are accustomed to doing.

All POs and requisitions approval are done through the Fluid Approvals tile.

New Fluid View	• Requisition creation, editing and review. • Requisition submission. • Budget checking. • **Requisition/purchase order approval.**
Current Classic Plus View	• Expedite requisition to purchase order. • Requester – Submit approval and budget check PO. • Purchase order inquiry. • Dispatch purchase order. • Purchase order add/update.

- Critical update: **Do not select the PURCHASE ORDER APPROVAL** hyperlink at the bottom of the Add/Update page as was the process before in Classic Plus.
- All approvals for requisitions and POs must go through the Fluid Approvals tile.
- The PO approval process is the same as the requisition approval process.
    - Refer to the Approver Role section in this user guide.
- Once the purchase order has successfully passed the budget check and the requestor has pre-approved the purchase order, the purchase order will be made available for the Purchase Order approval workflow.



In Fluid, the **Purchase Order Approval** link is not used. Do not select.

Step 10: Dispatch PO Using Classic Plus.

New Fluid View	• Requisition creation, editing and review. • Requisition submission. • Budget checking. • Approver role – Requisition/purchase order approval.
Current Classic Plus View	• Expedite requisition to purchase order. • Requester – Submit approval and budget check PO. • Purchase order inquiry. • **Dispatch purchase order.** • Purchase order add/update.

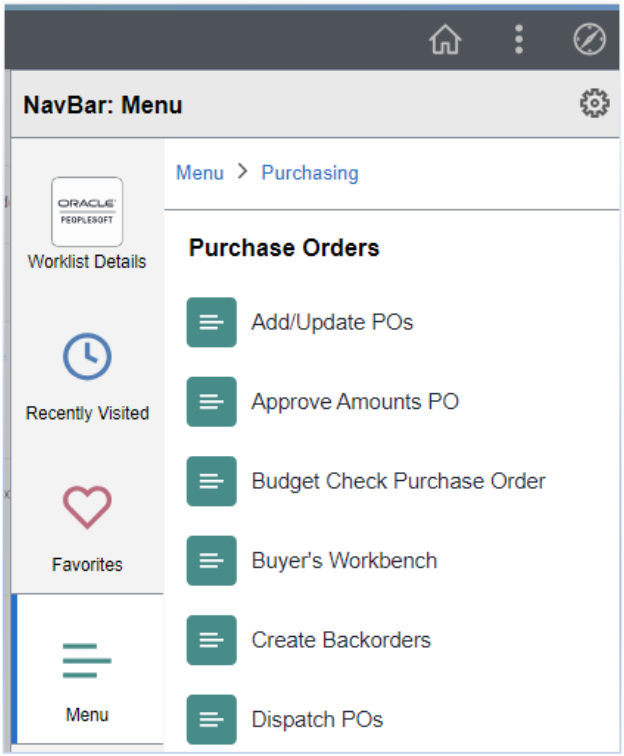
Once your PO has been fully approved by all approvers in the approval chain, you may move to dispatching the PO. Follow your agency internal purchasing procedures.

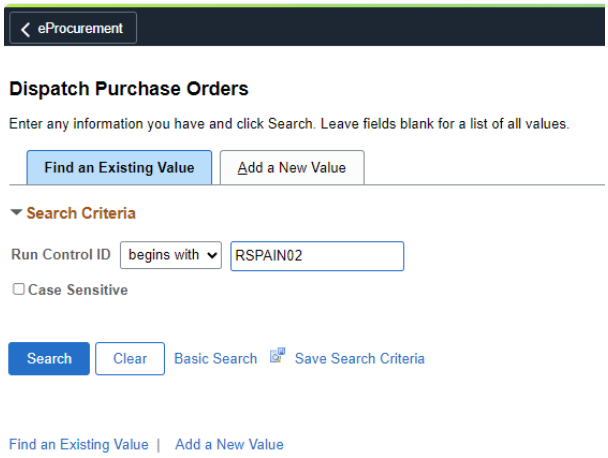
Option 1:

Navigation:

- Select the **compass** icon at the top right of the screen.
- Menu > Purchasing > Purchase Orders > Dispatch POs.
- Enter your **Run Control ID** (or add a new value if you do not have one).

Flag Modifications



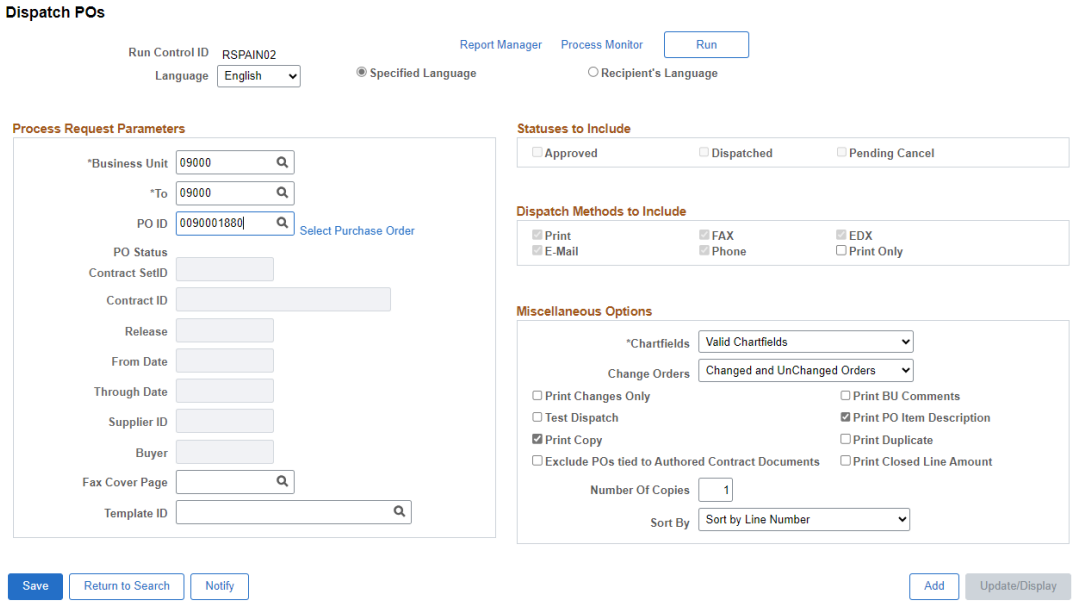


On the **Dispatch POs** page:

- Enter **Process Request Parameters**.
- Select **Report Manager**.
- Select your **PO**.
- Select **Edit PO**.
- Select **Dispatch Method – Email**.
- Confirm your email address populates in the Email ID field.
- Select **OK**.
- Select the **PO** link once the email is received.
- Save to your chosen folder.

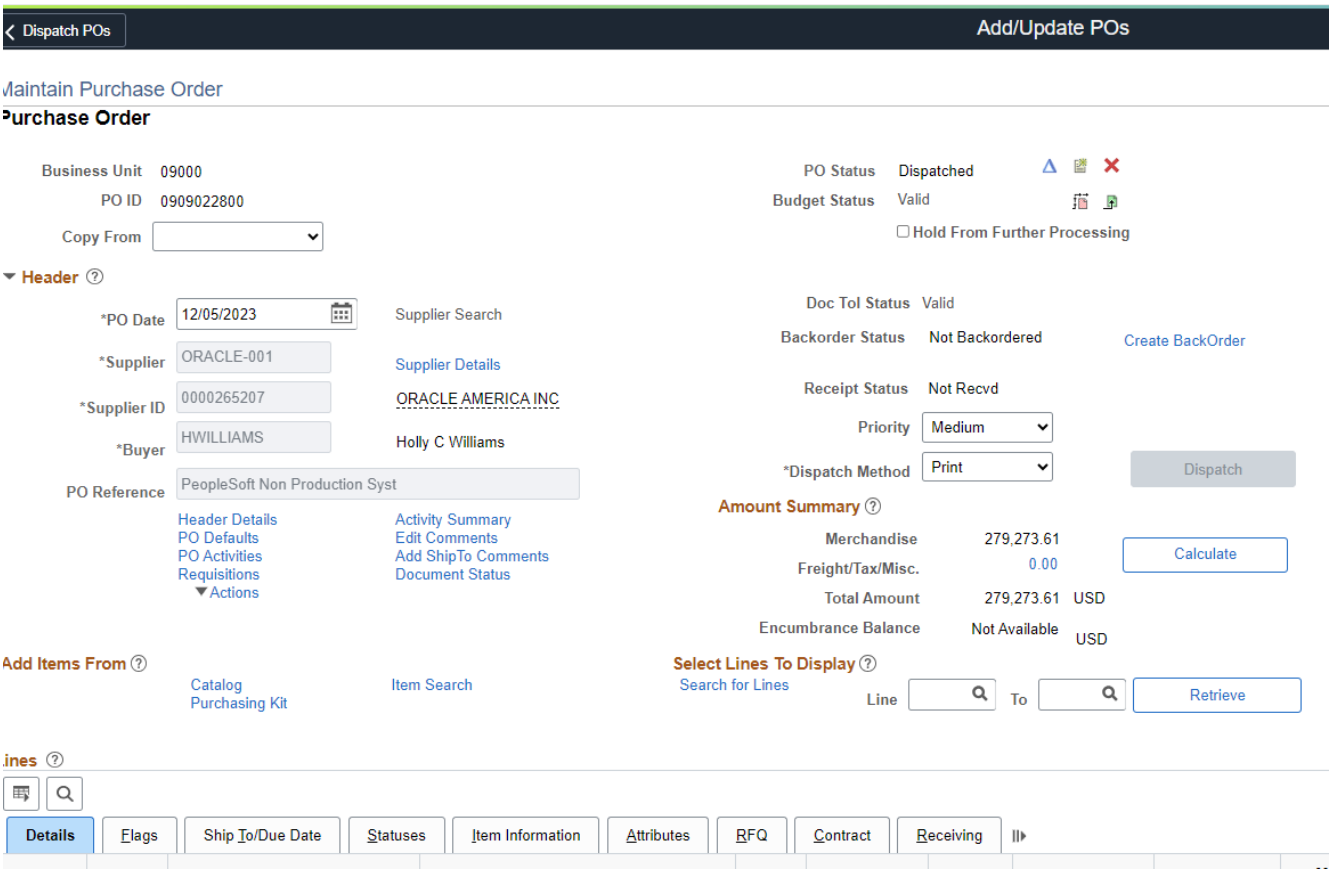
Flag Modifications

- Save a copy to the PO Header Comments.

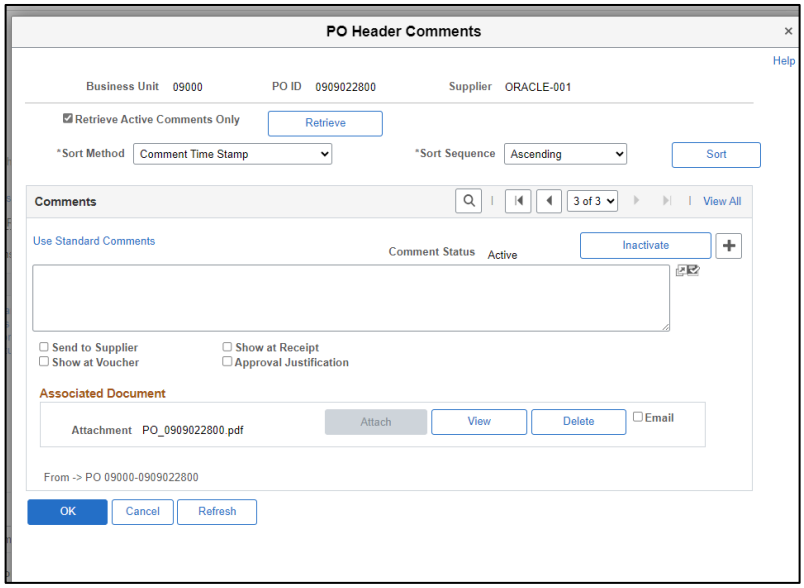


Navigation: Menu > Purchasing > Add Update Purchase Order.

- Enter **Bus Unit** and **PO ID**.
- Select **Edit Comments** under the Header section.



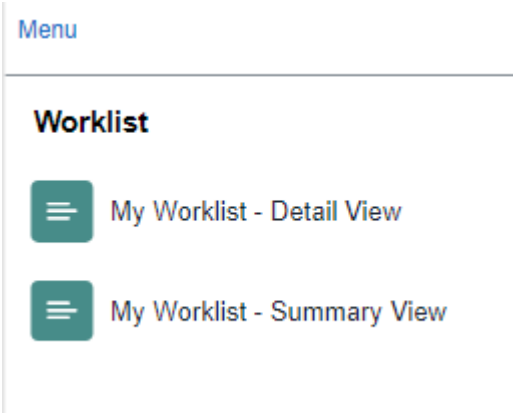
- Attach a copy of the PO.



Option 2:

Alternately, a requester may elect to navigate to the **Worklist**. Select the **PO** hyperlink and follow the same procedure in Option 1.

Navigation: Menu > Worklist.



Once your PO is dispatched, you can proceed with obtaining authorized signatures and sending the PO to your supplier.

Select to Return to Table of Contents

Approver Role/Approving Requisitions and Purchase Orders.

Recall requisitions and purchase orders are now approved in Fluid vs. the Classic Plus View we are using now and there is a new process.

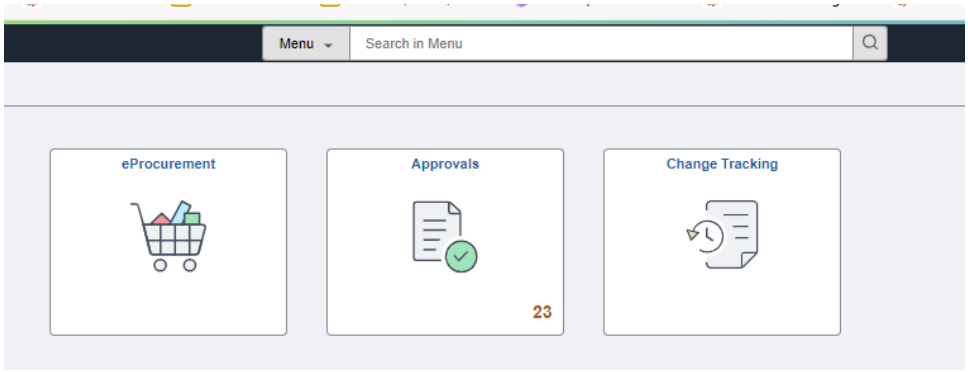
New Fluid View	• Requisition creation, editing and review. • Requisition submission. • Budget checking. • **Approver Role – Requisition/purchase order approval.**
Current Classic Plus View	• Expedite requisition to purchase order. • Requester – Submit approval and budget check PO. • Purchase order inquiry. • Dispatch purchase order. • Purchase order add/update.

Steps to approve a requisition or purchase order:

Step 1: Navigate to the Fluid homepage.

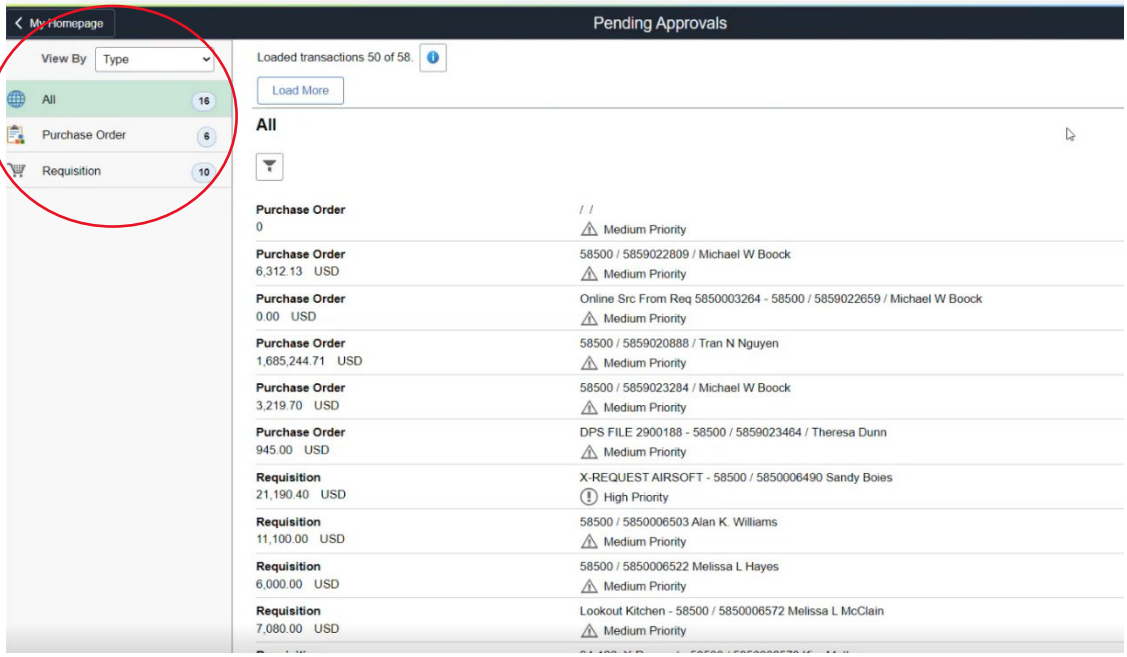
Step 2: Select the **Approvals** Fluid tile.

- The **Pending Approvals** page opens.



Flag Modifications

- Filter by type by selecting the **All**, **Purchase Order** or **Requisition hyperlinks**.



Load More Button.
This is critical for approvers who have more approvals than the default number which displays on the **Pending Approvals** page.
If an approver does not have the **Requisition** or **Purchase Order** option displayed on the left side of the page, select the **Load More** button to display ALL transactions in the approval queue (Requisitions and POs).
It is possible **Load More** may need to be selected several times.

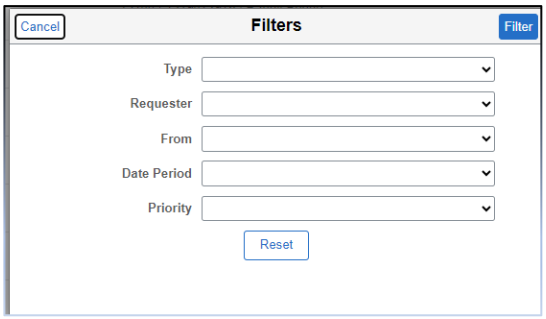
Step 3: Find Req or PO on Pending Approvals page.

- Search for and find **Requisition** or **Purchase Order** on the **Pending Approvals** page.
- In the **View By** field, you may select one of the following:

Flag Modifications

Or to search for a requisition or PO, do one of the following:

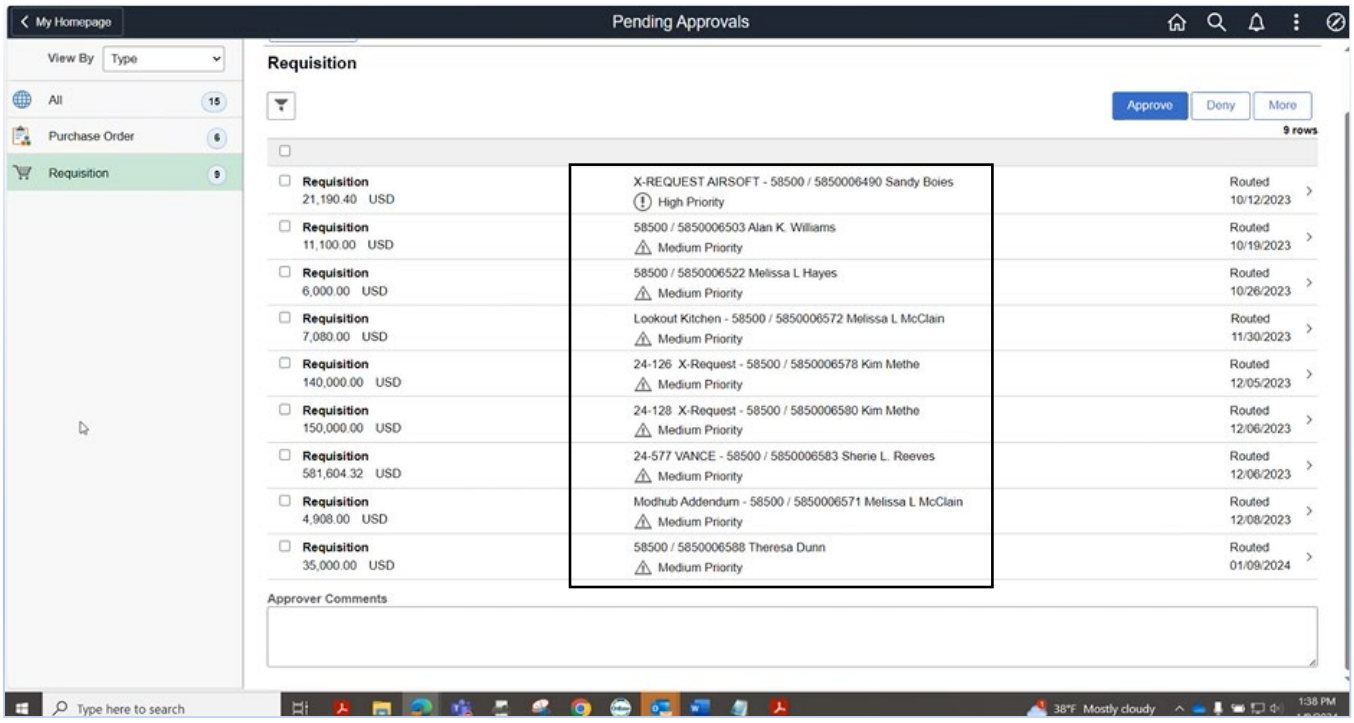
1. Use the browser search function by selecting **CTRL+F (find)** keys and enter a string of numbers of which you are searching as shown in the illustration below.
2. Use the **scroll bar** on the right side of the page.
3. Use **the filter** which results in the same options as **View By** field.



Step 4: Select the **Requisition** or **Purchase Order No**.

- Select the **requisition or PO** hyperlink in the middle column.

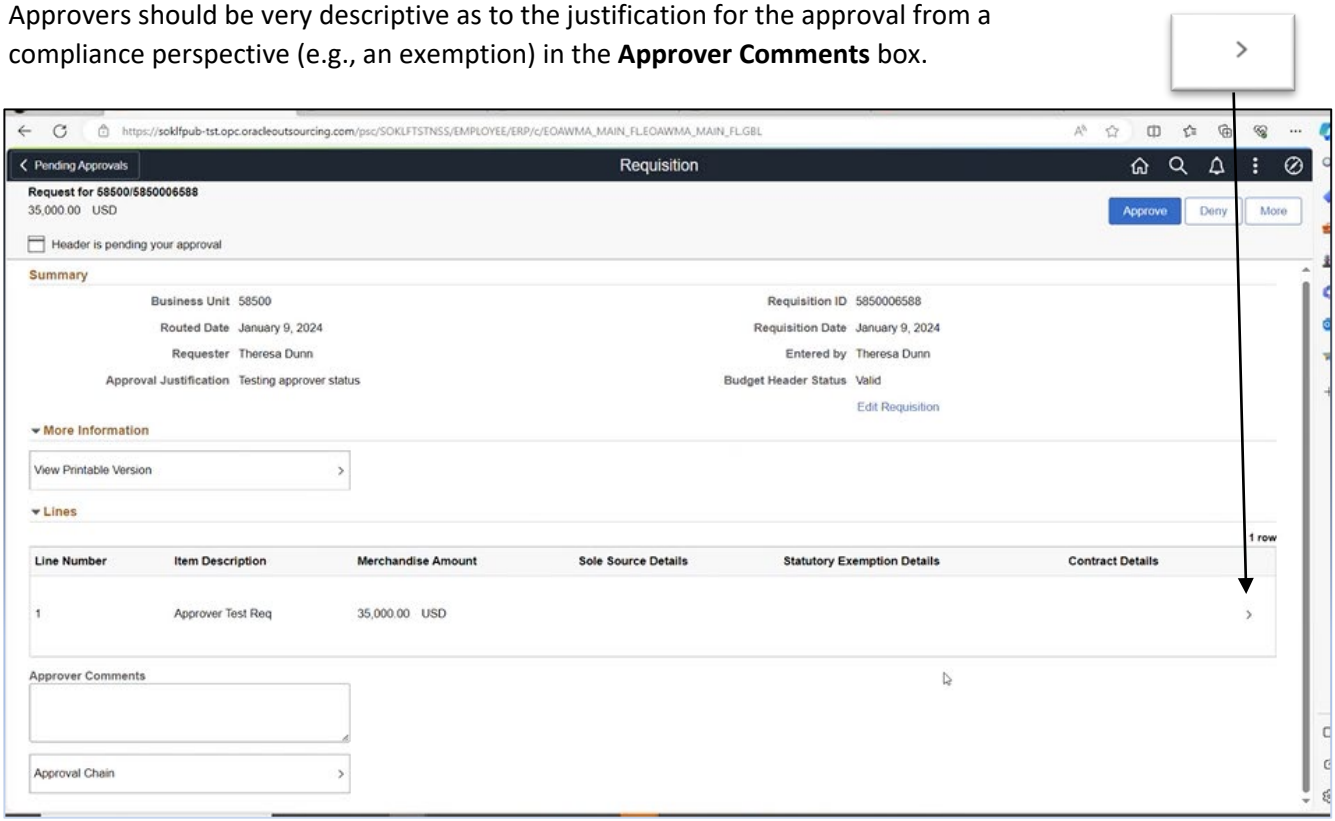
Flag Modifications

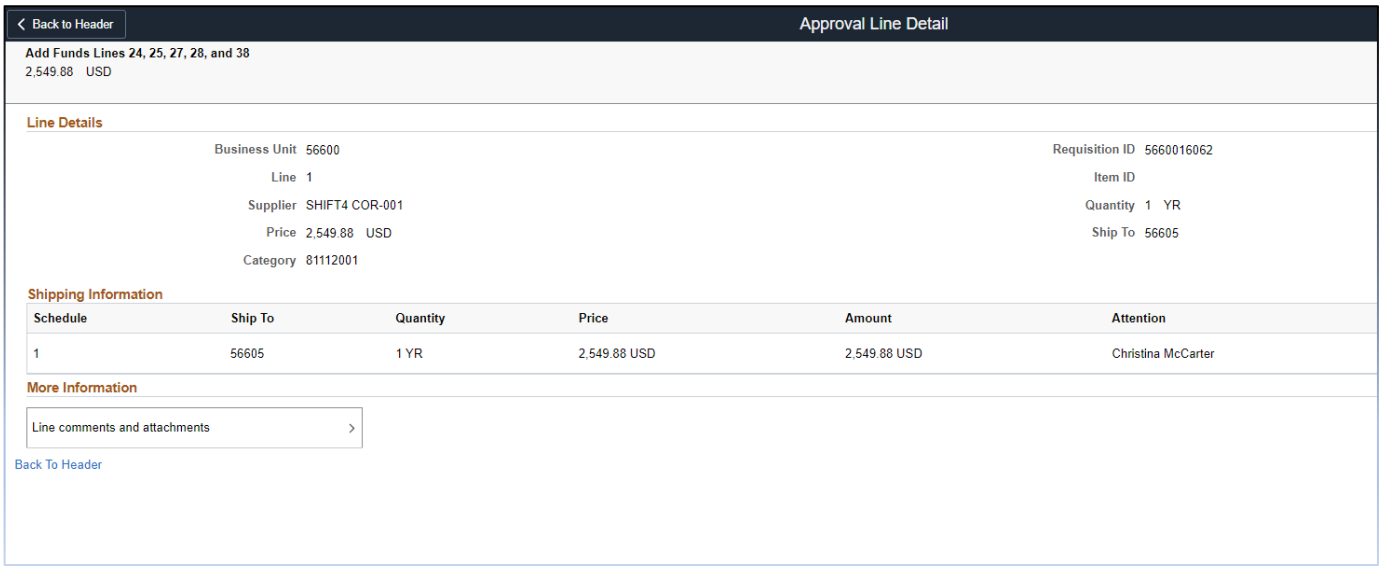


- The Requisition or PO page opens with options: **Approve**, **Deny** and **More (Pushback or Hold)**.
- Select the **right arrow** at the end of the Line No as show below to view distribution information, if desirable.
- Enter approver comments.

Flag Modifications

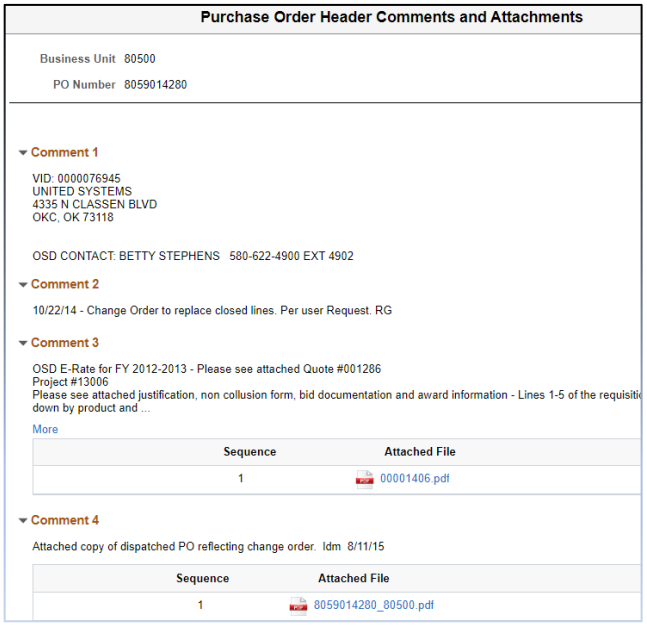
Approvers should be very descriptive as to the justification for the approval from a compliance perspective (e.g., an exemption) in the **Approver Comments** box.





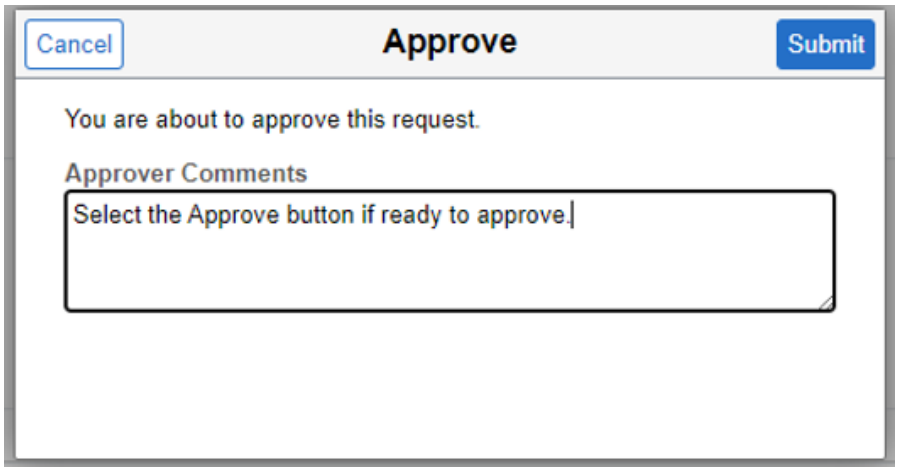
Step 5: View Comments and Attachments.

- Select the **View Comments and Attachments** link and the Requisition or PO Header Comments and **Attachments** will display.



Step 6: Approve Requisition or PO.

- Select **Approve**. **Deny, Pushback** and **Hold** under the **More** button can be executed on an individual basis per requisition.

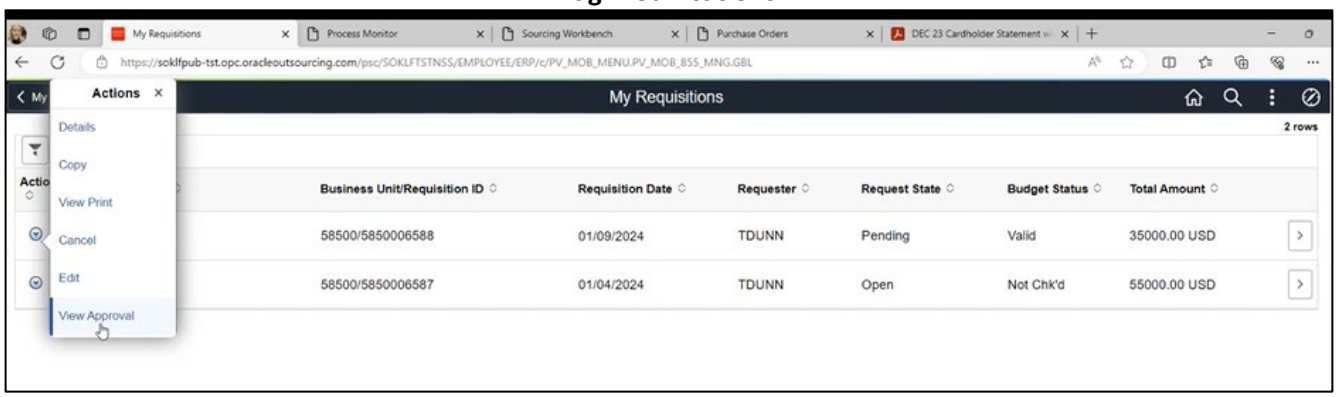


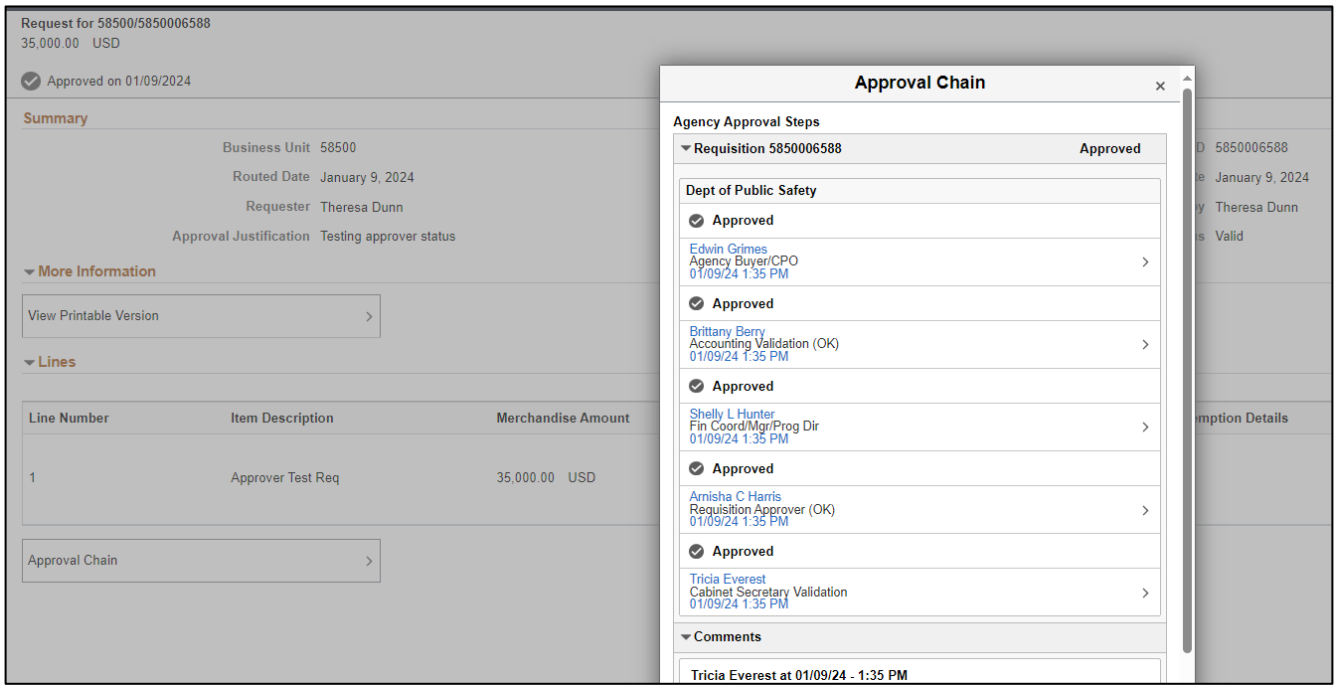
Step 7: View Requisition Approvals in Fluid.

Navigation**:** From the Homepage > eProcurement Fluid tile > My Requisitions Fluid Tile.

- Notice the requisition disappears from the **Pending Approvals** page.
- On the **My Requisitions** page, select the **arrow** to the left of the requisition.
- From the **Actions** items menu select **View Approval** to see the remaining **Approval Chain**.

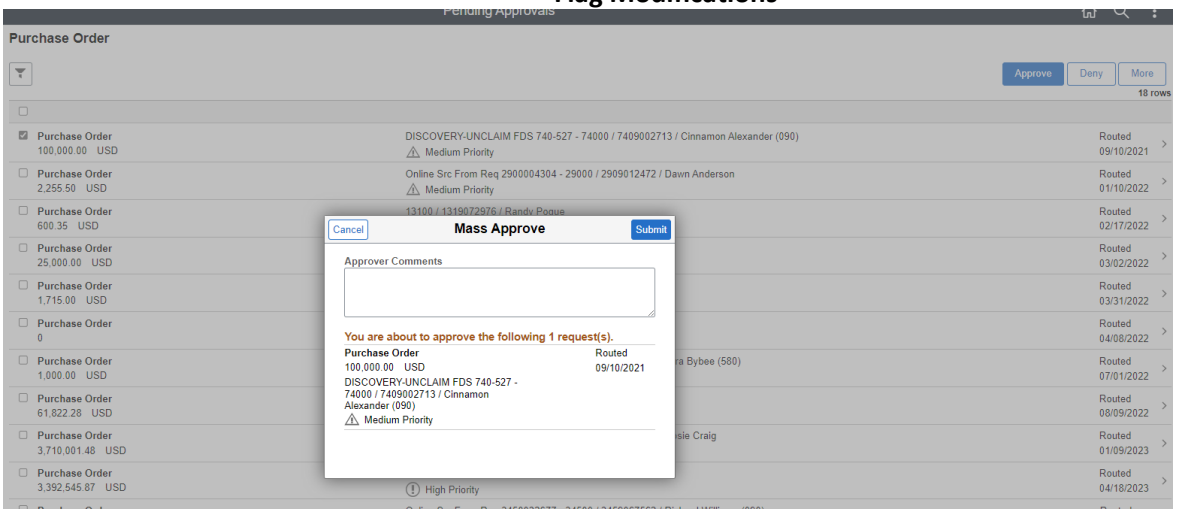
Flag Modifications





Select to Return to Table of Contents

Flag Modifications



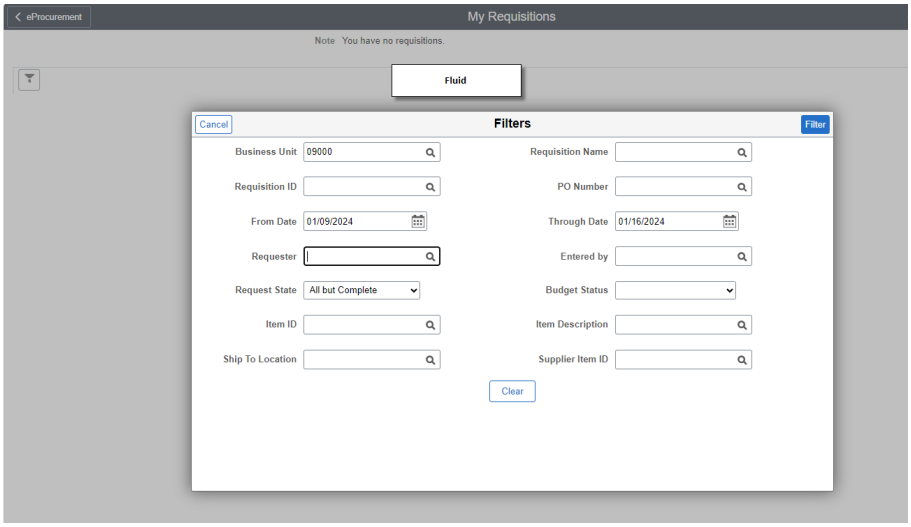
Note: Selecting the Requisition or PO Check Box in Pending Approvals and the Mass Approval box.

Currently Fluid allows a user to select one or more check boxes instead of the hyperlink in the middle column.

When this method is used, Mass Approve with Approve Comments displays.

Mass Approve functionality should only be utilized if the approver intends to approve all selected requisitions.

Manage Requisition (classic) vs. My Requisition (fluid).



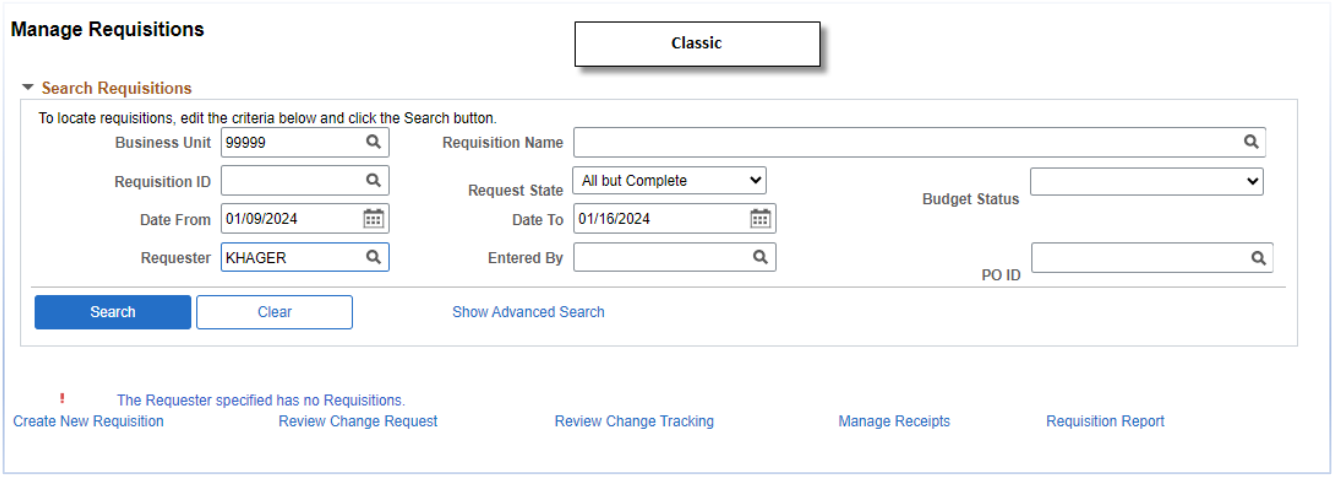
Flag Modifications

Fluid

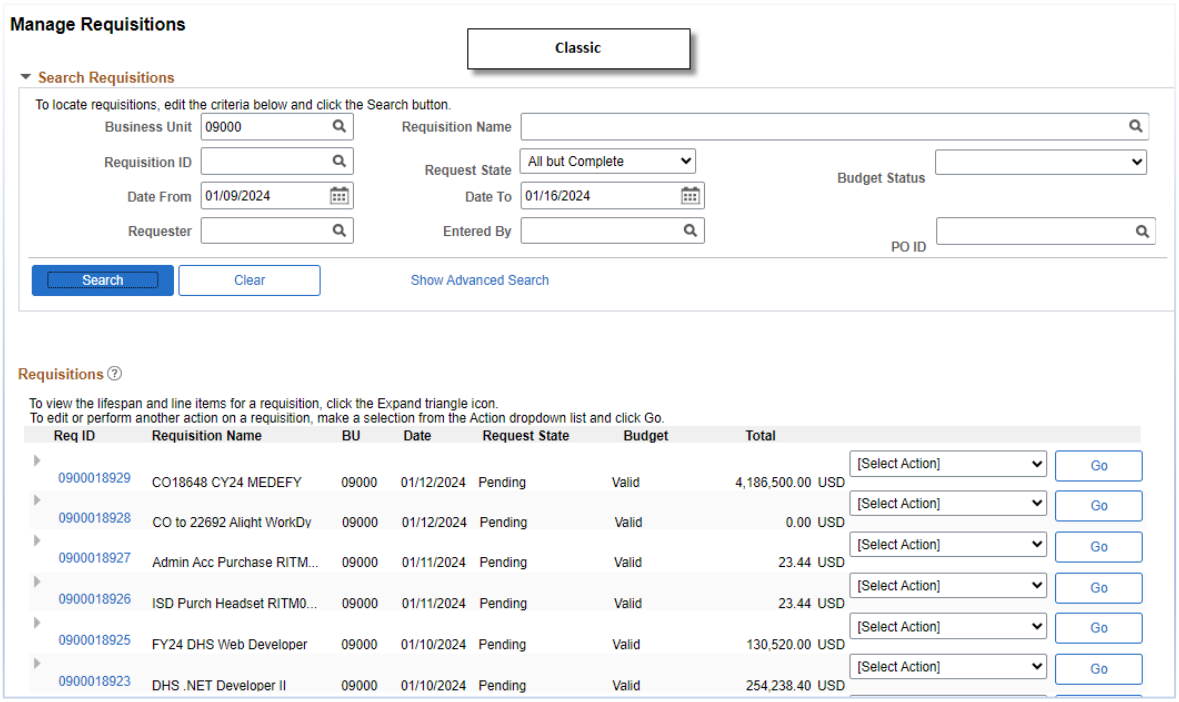
1 row

Requisition Name	Business Unit/Requisition ID	Requisition Date	Requester	Request State	Budget Status	Total Amount
0900018796	09000/0900018796	01/12/2024	RSPAIN02	Pending	Error	3500.00 USD

Classic



Classic



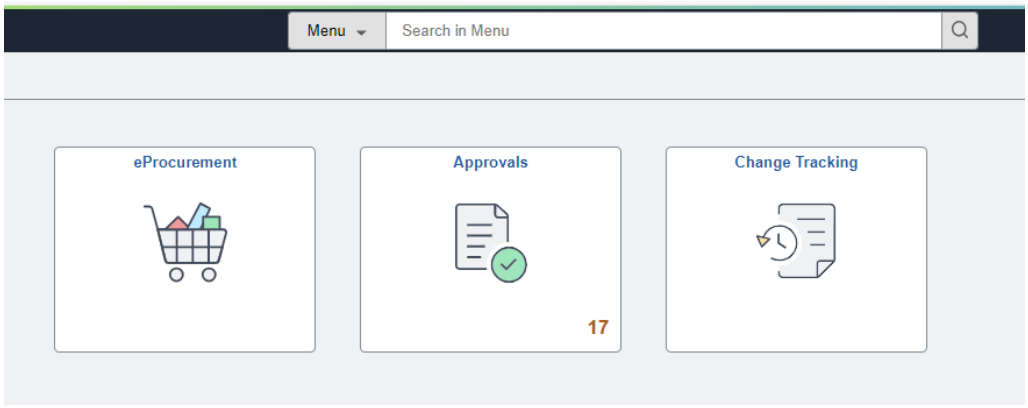
Select to Return to Table of Contents

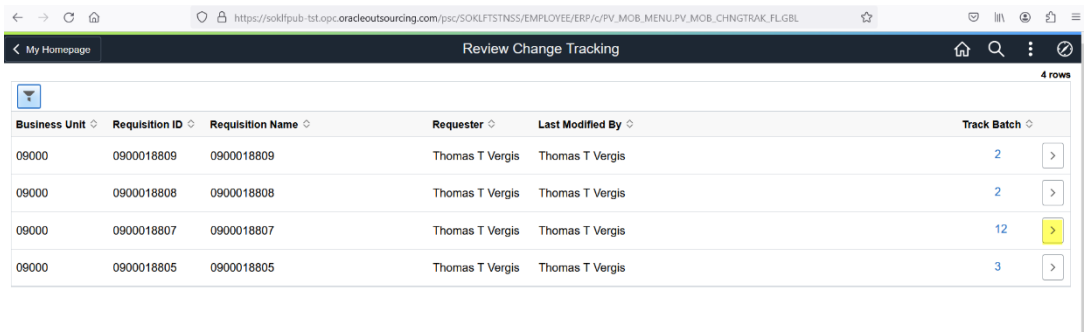
Additional Processes:

Change Tracking in Fluid.

To review any Change Orders on requisitions using the **Change Tracking** tile (Change Tracking for POs is still in Classic Plus):

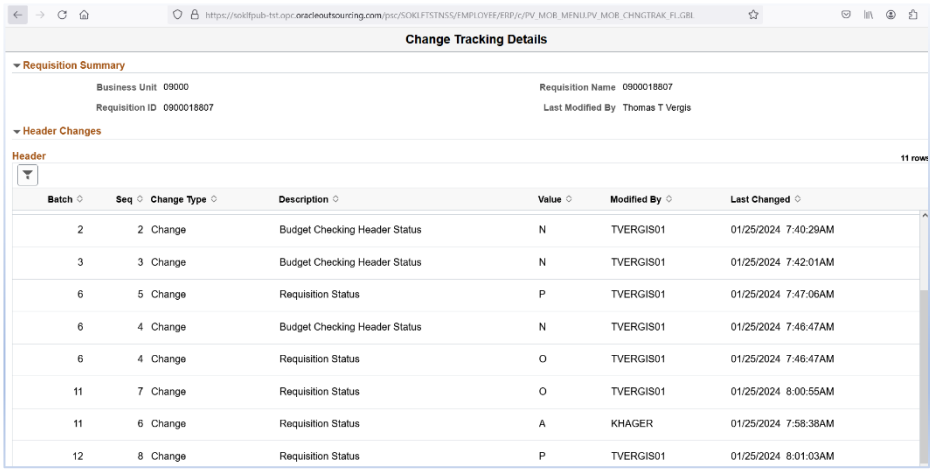
- Select **Change Tracking** tile.





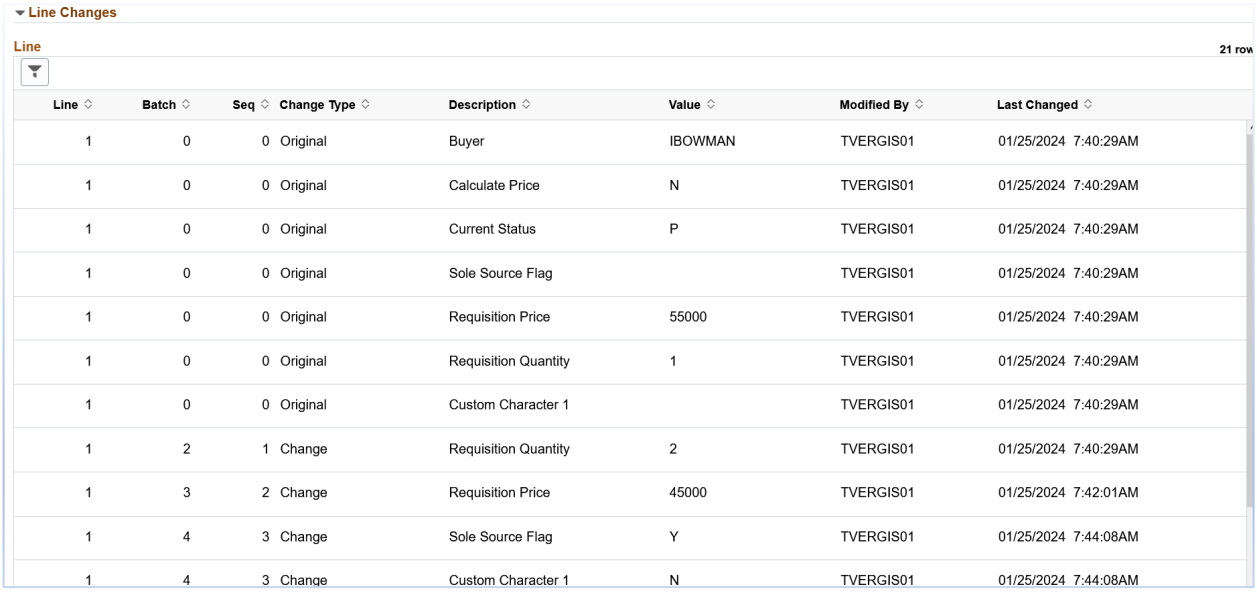
- Select the highlighted **arrow** to display **Change Tracking History** and track batch no. is displayed for associated Requisition.

Header Changes (if any) display.



Line Changes (if any) display.

Flag Modifications



Line Changes

Line

21 row

Line	Batch	Seq	Change Type	Description	Value	Modified By	Last Changed
1	0	0	Original	Buyer	IBOWMAN	TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Calculate Price	N	TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Current Status	P	TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Sole Source Flag		TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Requisition Price	55000	TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Requisition Quantity	1	TVERGIS01	01/25/2024 7:40:29AM
1	0	0	Original	Custom Character 1		TVERGIS01	01/25/2024 7:40:29AM
1	2	1	Change	Requisition Quantity	2	TVERGIS01	01/25/2024 7:40:29AM
1	3	2	Change	Requisition Price	45000	TVERGIS01	01/25/2024 7:42:01AM
1	4	3	Change	Sole Source Flag	Y	TVERGIS01	01/25/2024 7:44:08AM
1	4	3	Change	Custom Character 1	N	TVERGIS01	01/25/2024 7:44:08AM

Schedule Changes (if any) display in the same way as Header and Line.

As part of the LOFT EO System recommendation and the introduction of the new Statutory Exemption flag, drop-down option and mandatory text field, in addition to the existing Contract Release and Sole Source flag, these will all register an incremental change to assist with visibility and oversight.

We have identified with Fluid, Approval Justification comments (or edits to comments) will reinitiate Workflow and increment Change Tracking twice.

Oracle is working to resolve this issue post go live. You may experience an incorrect track batch number (Change Order #) when dealing with Approval Justification Comments until a solution is provided. (Header and Line Comments are unaffected).

Re-sourcing a Requisition from PO to Re-source Requisition Quantities.

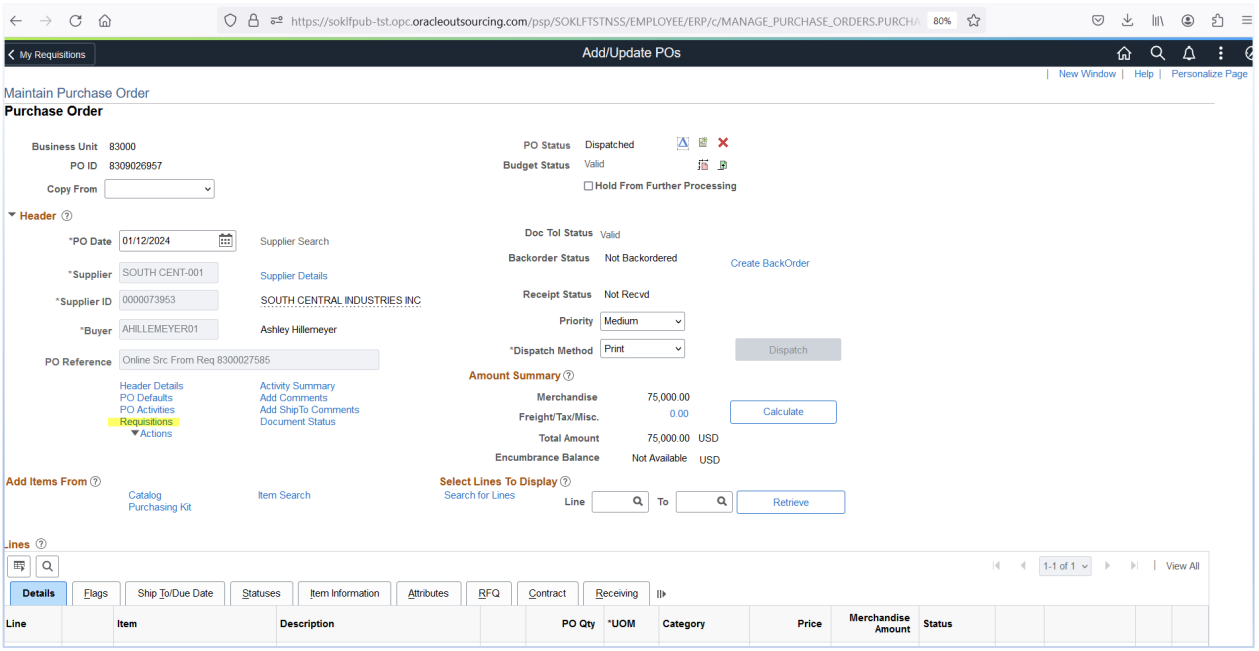
If a PO is no longer needed or copied to incorrect PO, the following steps can be taken to re-source the requisition quantities. This can be done by cancelling the entire PO or by re-sourcing a line or more on the PO.

This only applies to POs which payments have not been vouchered.

Using Classic Plus View:

- Navigate to **NavBar:** Menu > Purchasing > Purchase Orders > Add/Update POs.
- Find Existing Value: Enter BU & PO ID.

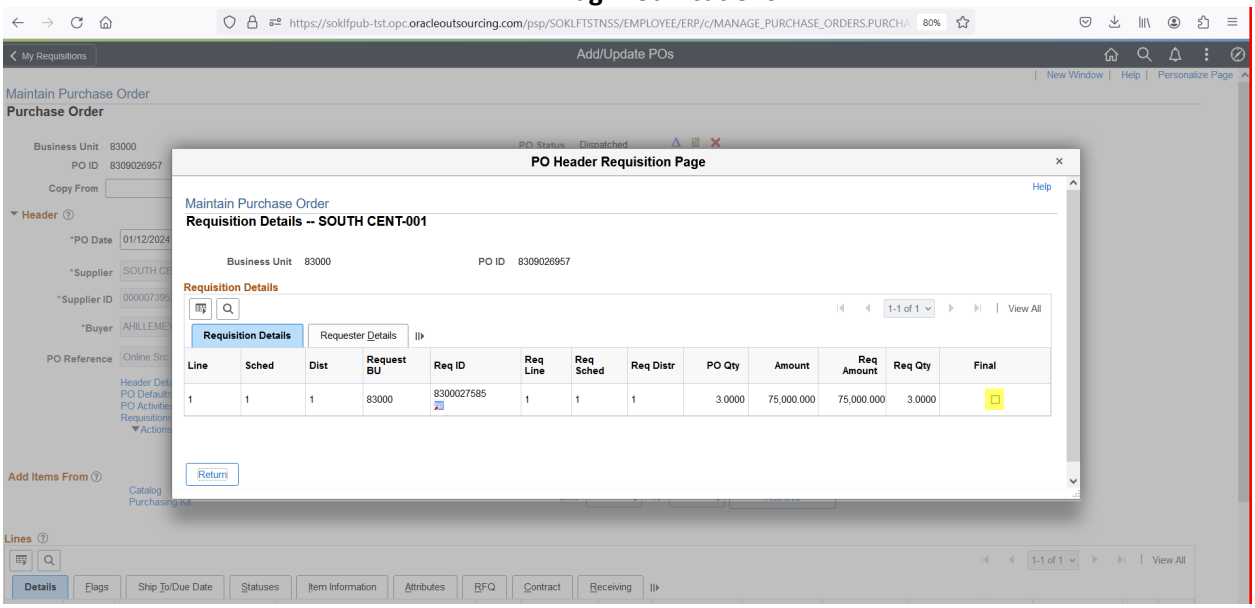
1) From the Add/Update POs page, select **Requisition** Hyperlink to validate the PO has not been finalized from the requisition.



2) Review to make sure **Final** flag is unchecked.

Select to Return to Table of Contents

Flag Modifications

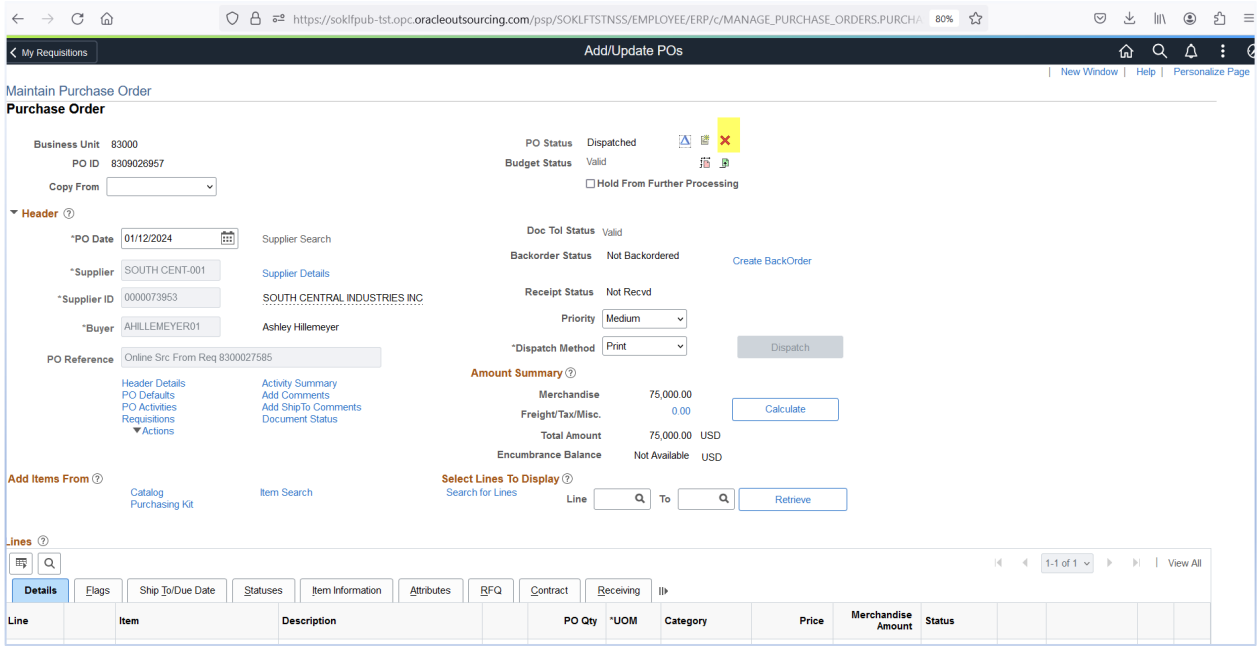


If **Final** flag is checked, then the PO will need to be **un-finalized** before proceeding to next step.

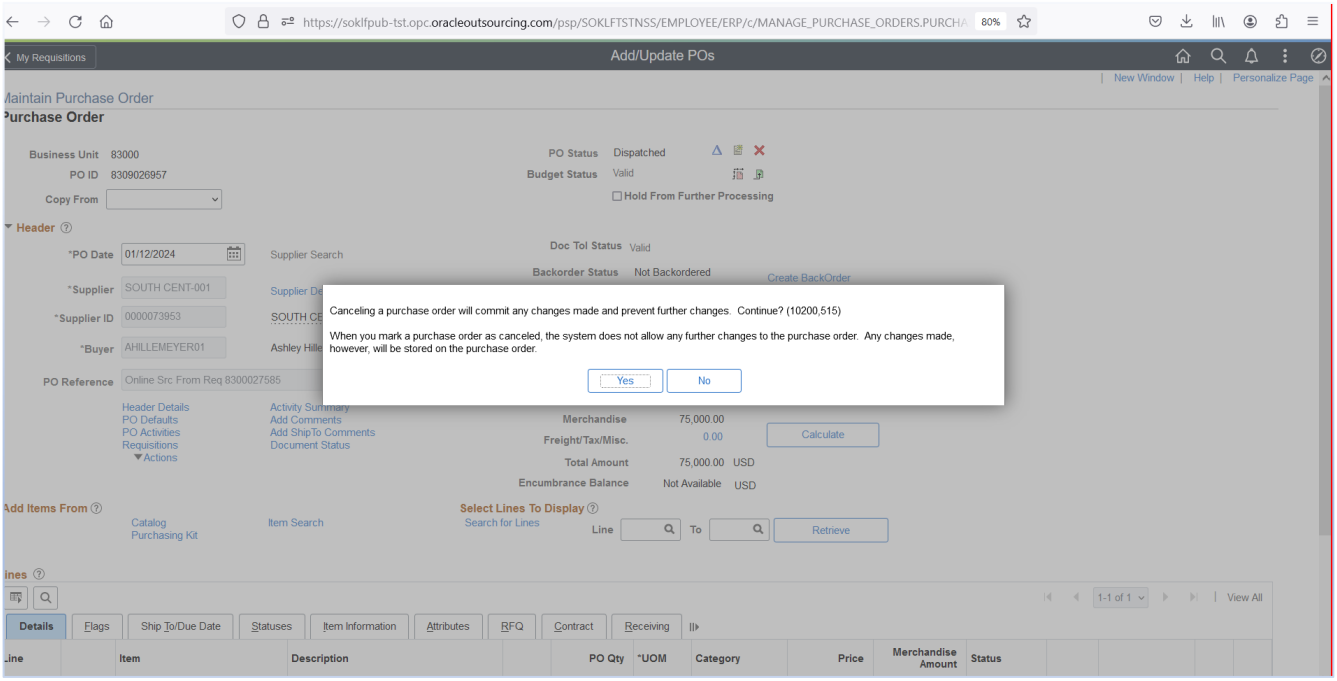
3) Select **Cancel** (red X) icon:

Dialogue box message displays:

"Canceling a purchase order will commit any changes made and prevent further changes. Continue? When you mark a purchase order as cancelled, the system does not allow any further changes to the purchase order. Any changes made, however, will be stored on the purchase order."



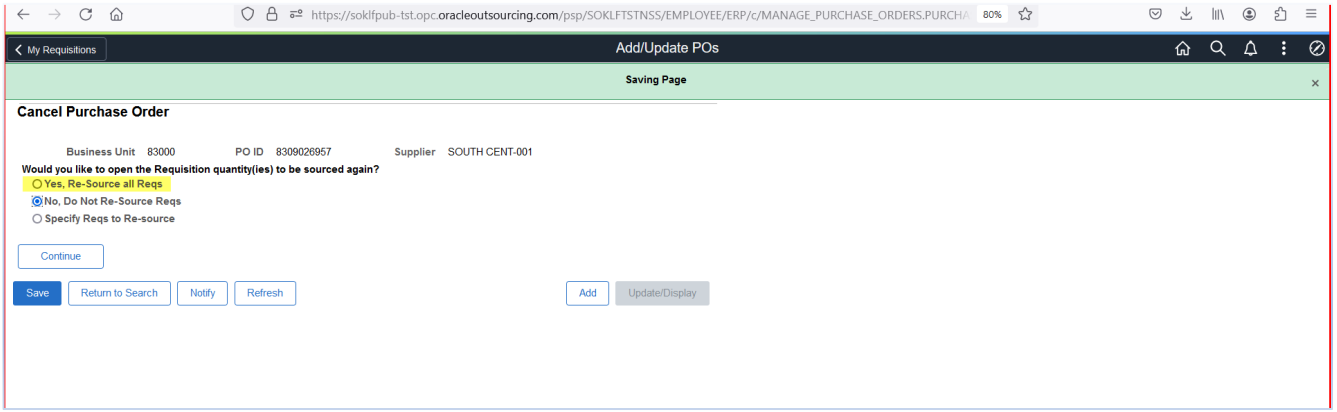
4) Select prompt **Yes** to proceed.



Dialogue box message displays:

"Would you like to open the Requisition quantity(ies) to be sourced again?"

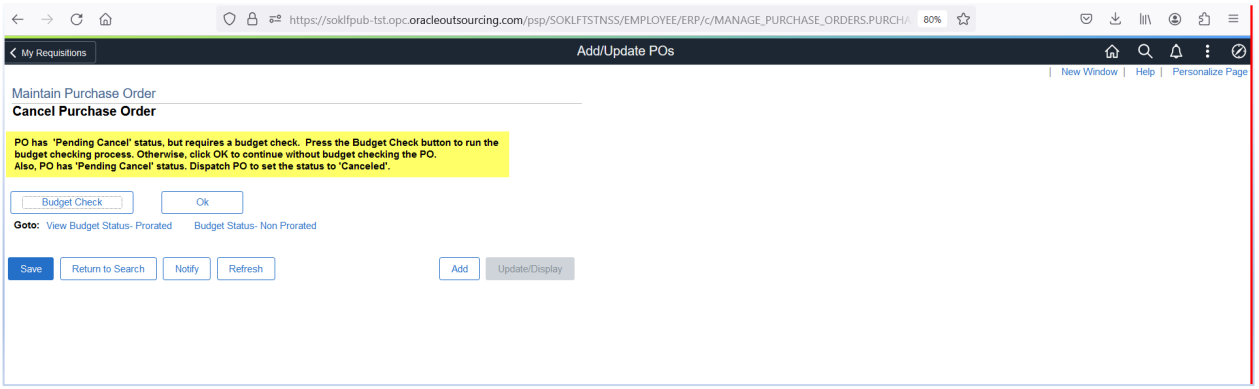
5) Select **YES** at **Yes, Re-Source All Reqs**.



6) Select **Continue**.

7) Read the verbiage on the Add/Update page as shown below:

Flag Modifications



8) Budget check and dispatch PO to set status to **Canceled**.

The PO must be budget checked and dispatched to move the PO Status to cancel and to make the Requisition available to be resourced to another PO/Line.

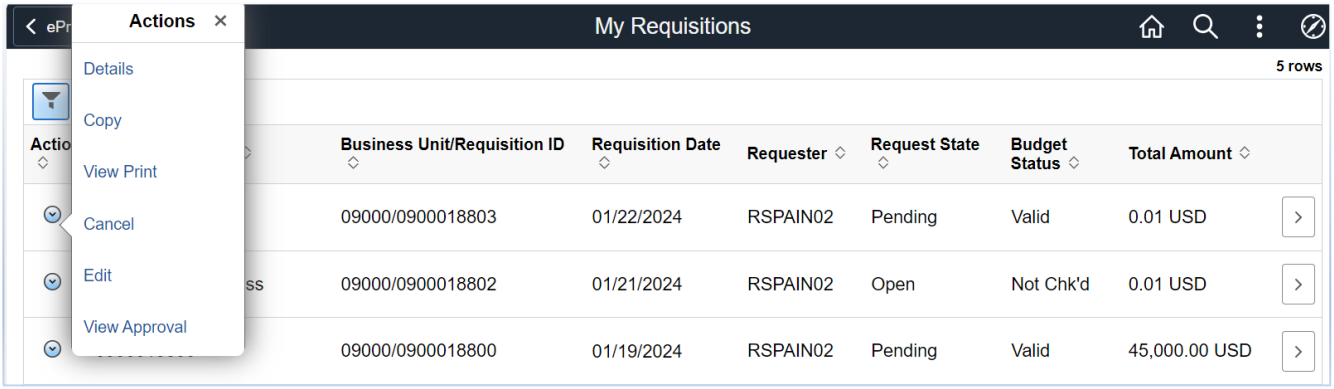
If you are canceling only a line of an existing needed PO, to resource the requisition associated with the line, select the bottom option **Specify Reqs to Re-source**.

Select to Return to Table of Contents

How to Edit a Requisition.

Navigate to **My Requisitions** on the Fluid homepage.

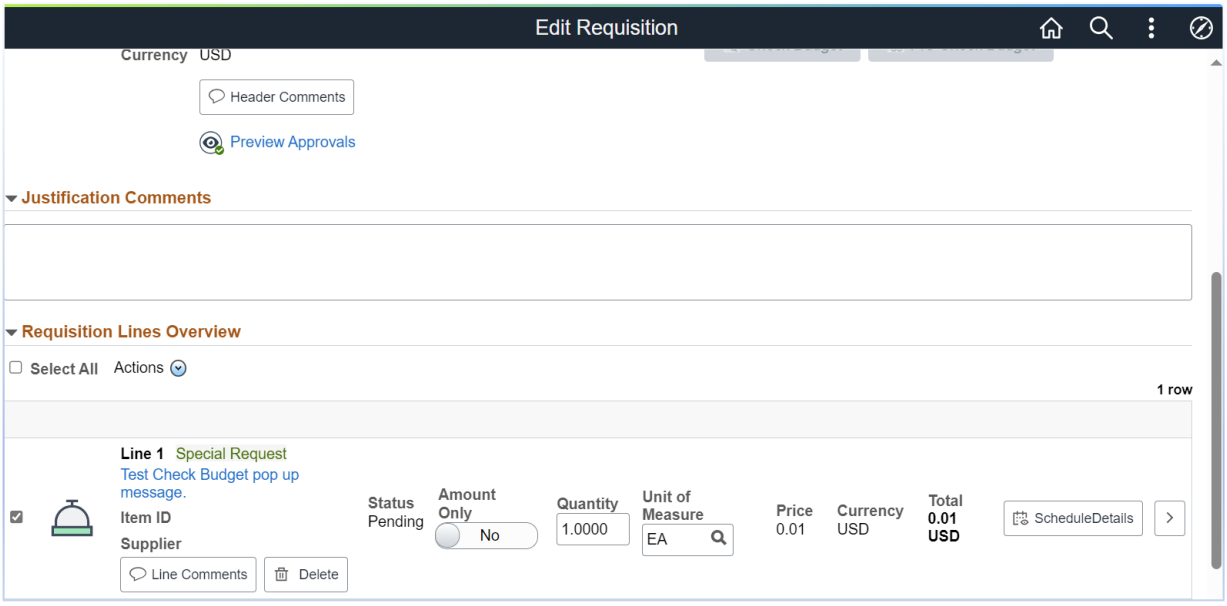
- Select the **eProcurement** Fluid tile.
- Select the **My Requisitions** Fluid tile.
- Utilize the Filter By function, if necessary (top left portion of page.) 
- Locate your requisition ID.
- Select the **Actions** menu by selecting the **arrow** next to your requisition.
    - Alternately, you can select the **requisition** hyperlink.
- Select **Edit.**



- Under the **Requisition Lines Overview** section, select the **line check** box.
    - Alternately, you may select the **requisition** hyperlink.

Select to Return to Table of Contents

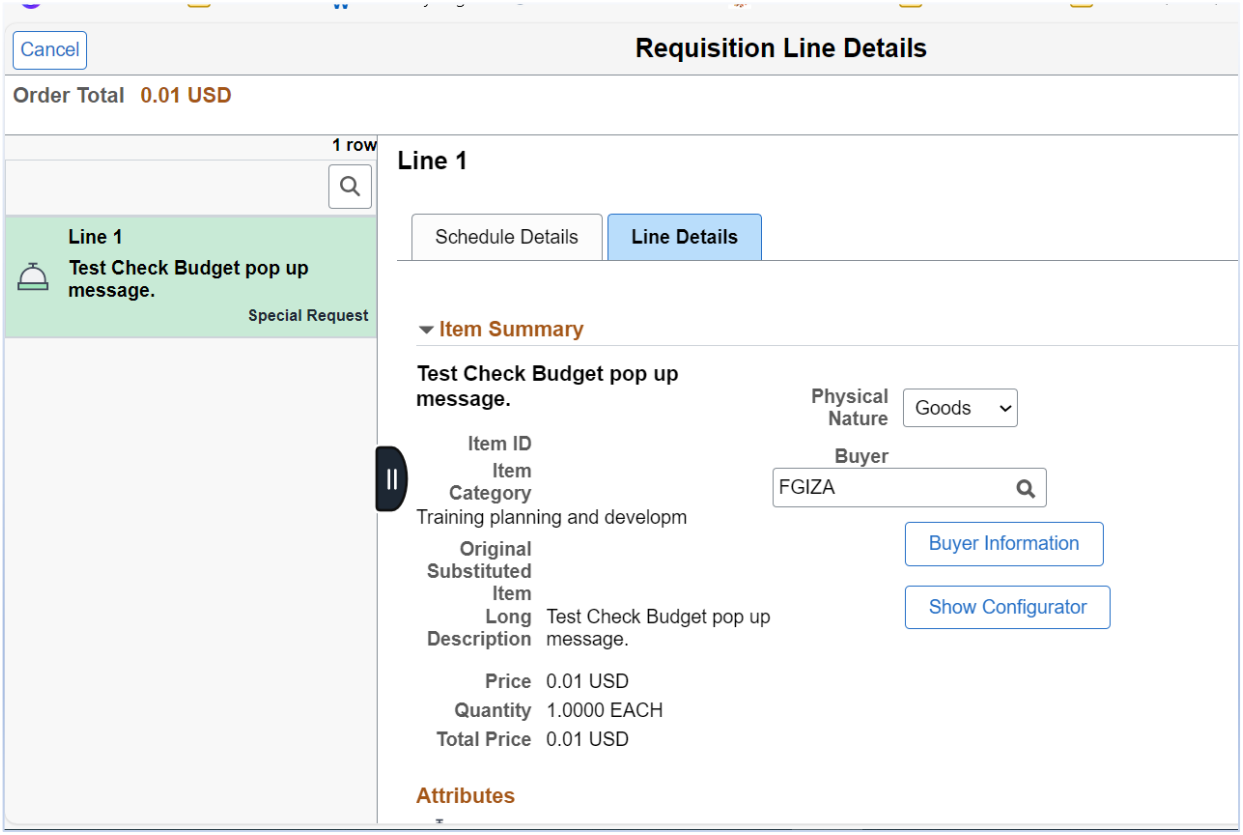
Flag Modifications



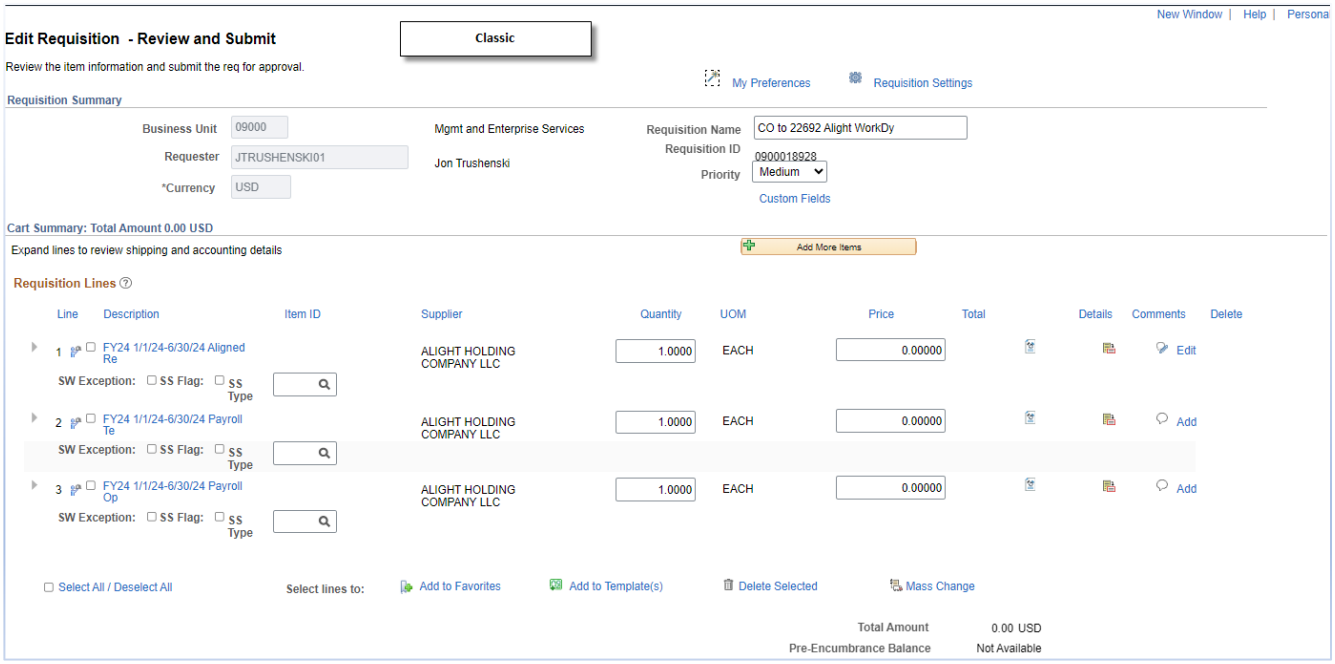
- Edit as needed in the **Schedule Details** and **Line Details** tabs.
- Select **Save**.
- Select **Checkout**.
- **Submit.**
- If quantity or value (dollar amount) are modified, you will need to **budget check**.

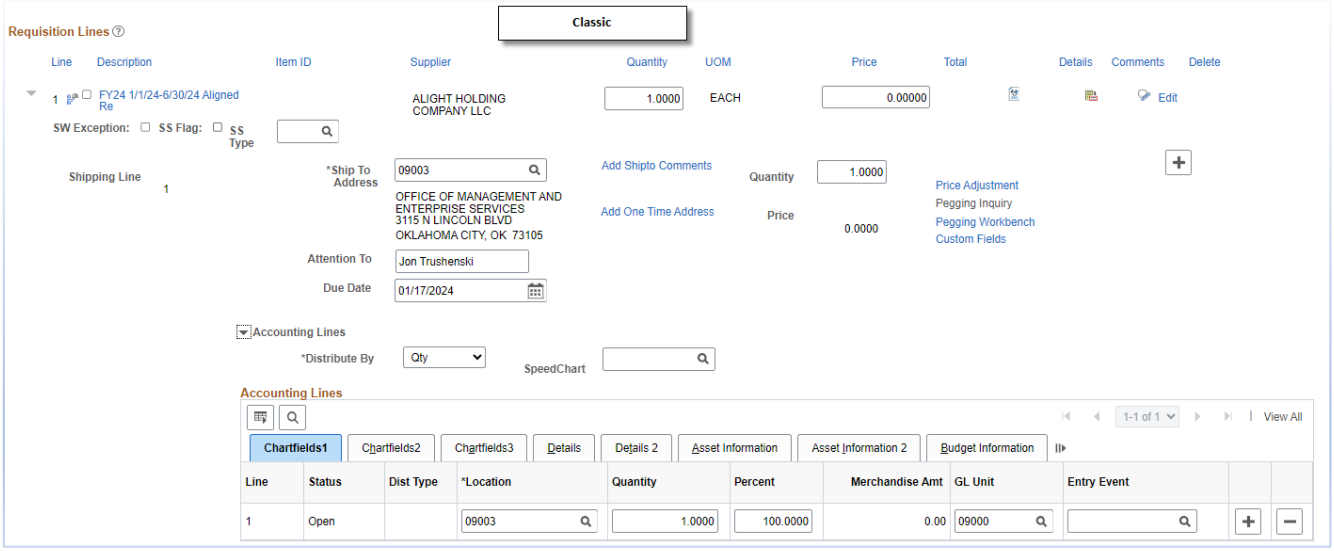
Select to Return to Table of Contents

Flag Modifications

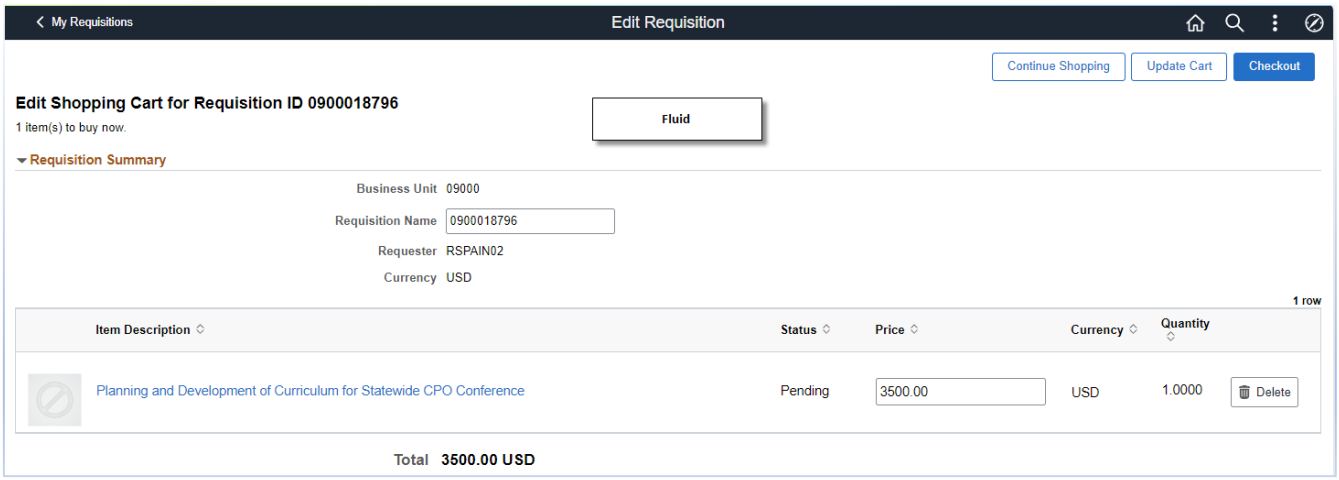


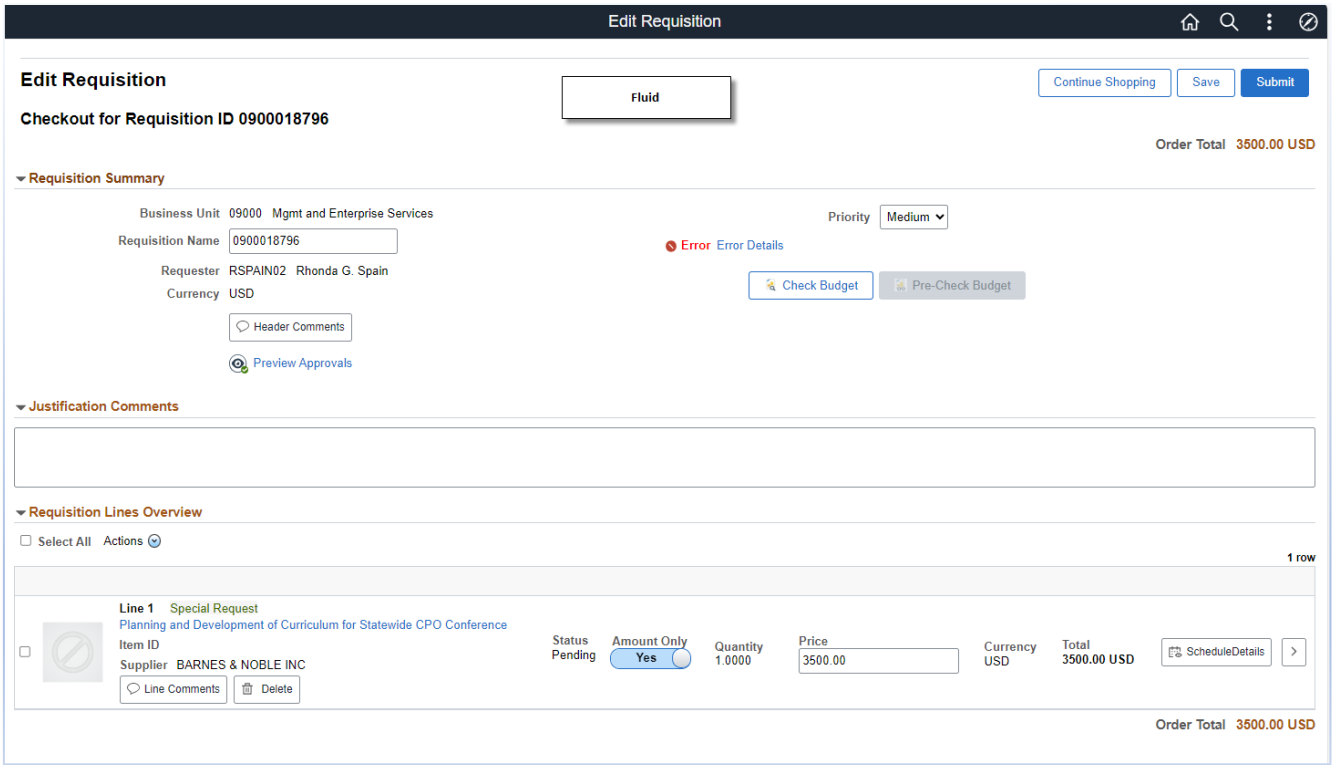
Flag Modifications
Edit Requisition (classic) vs. Edit Requisition (fluid)





Flag Modifications





Select to Return to Table of Contents

Existing/temporary Fluid Limitation.

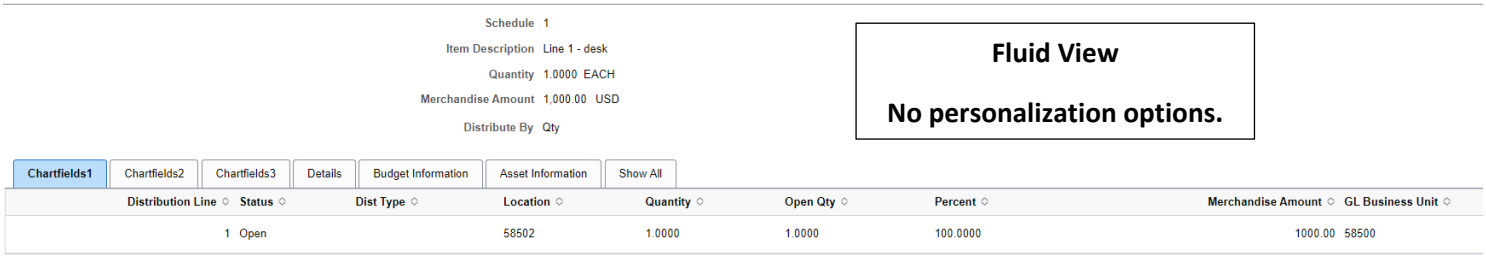
The processes below have been defined as limitations with Fluid. Every effort is being made to determine the root causes and quickly develop a fix. Notifications of resolution steps will be distributed accordingly.

Issue with Fluid Grid Customization – ChartField Data.

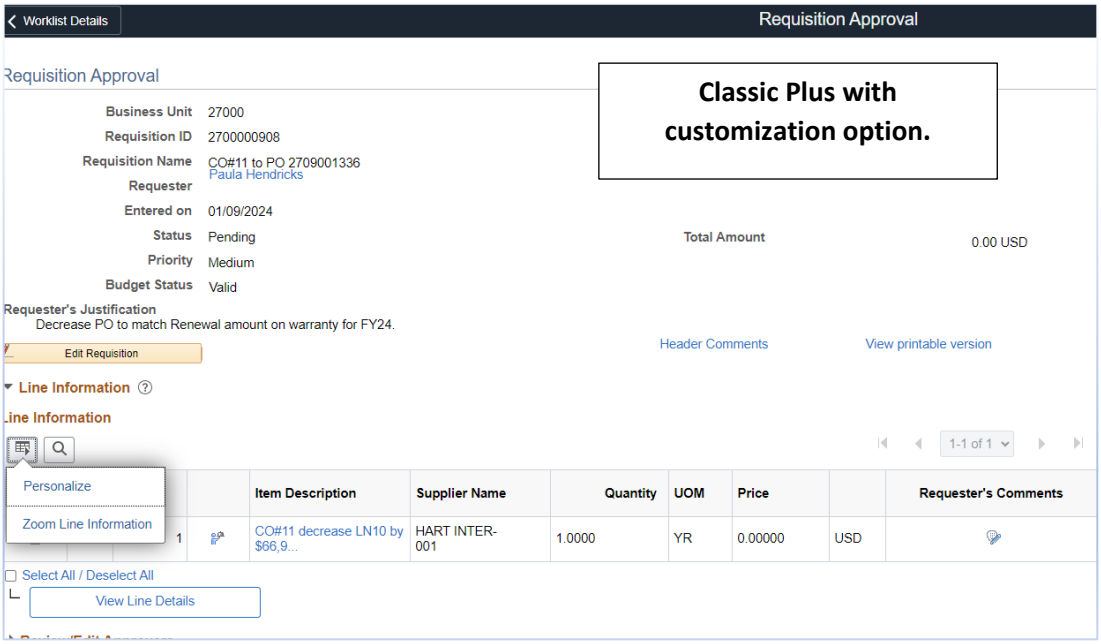
Limitation: Allow Grid Column Order Personalization.

Currently in Fluid the ability to limit the amount of irrelevant ChartFields data on screen and from view is not available.

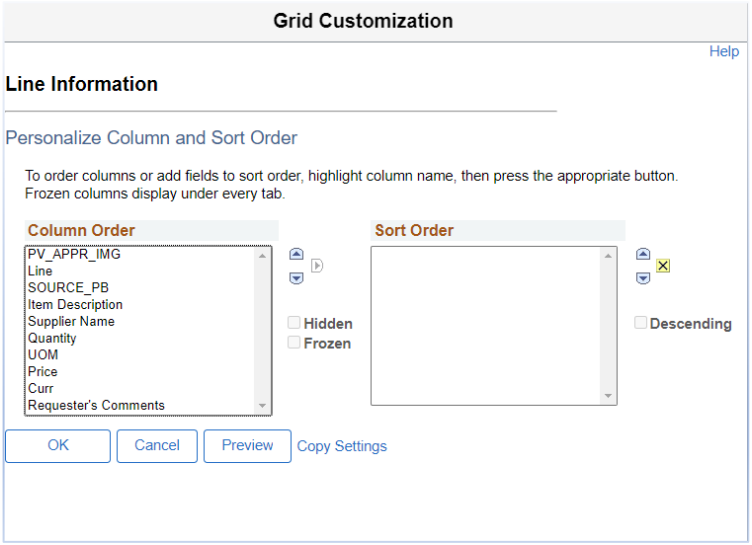
Classic Plus had the ability to hide certain ChartField data on specific tabs. Requestors were able to personalize a page/view which was not relevant to individual agency procedures and accounting processes.



Currently there is no plan to add this feature to Fluid although if Oracle receives significant upvote, the feature may be implemented in the future.

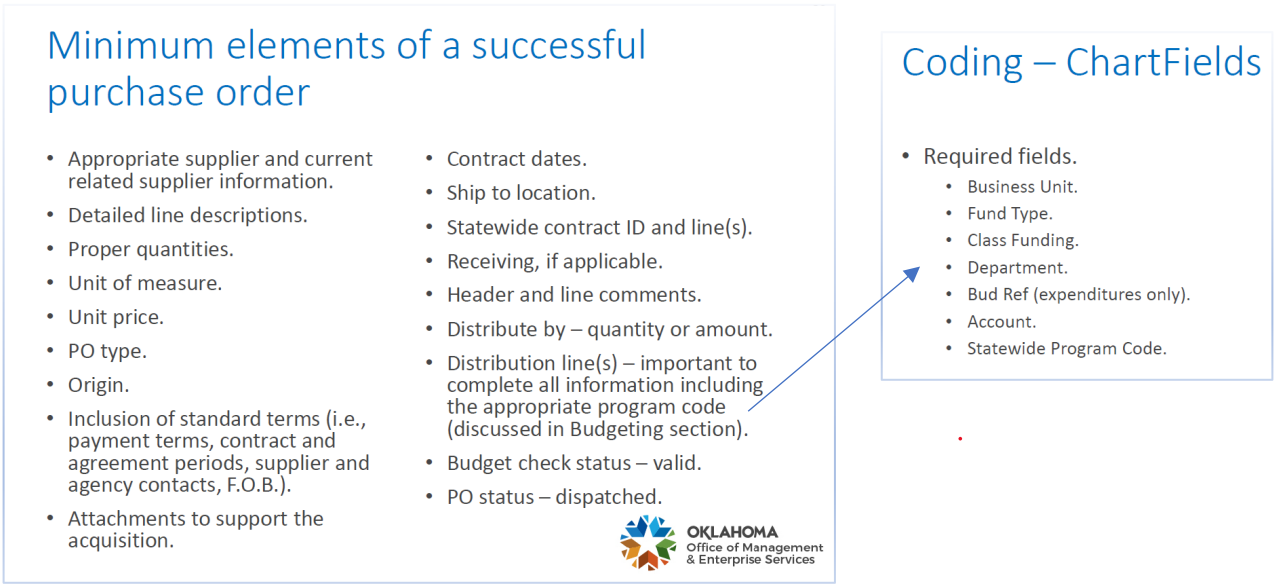


Flag Modifications



Select to Return to Table of Contents

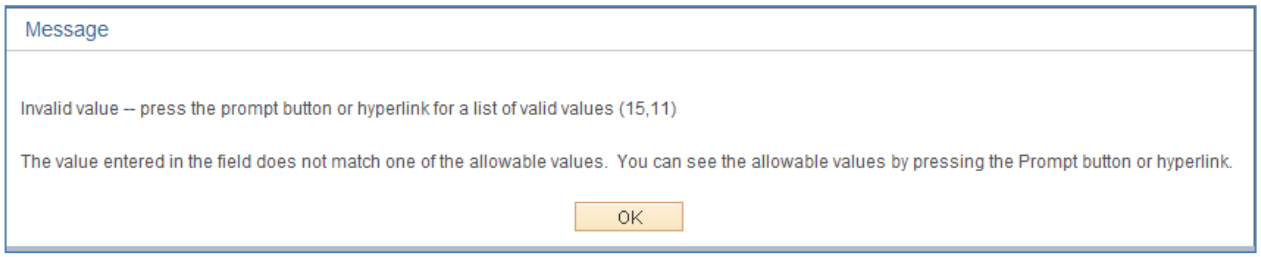
Appendix A – Elements of a Successful Purchase Order.



Appendix B – Error Messages.

There are several types of messages: **Warning, Error and Informational**. An error message is the only message that will stop you from saving the document if the issue is not fixed. Informational messages will require you to make a decision; normally these are Yes or No answers. Warnings are just warnings; normally you will either select OK or Cancel.

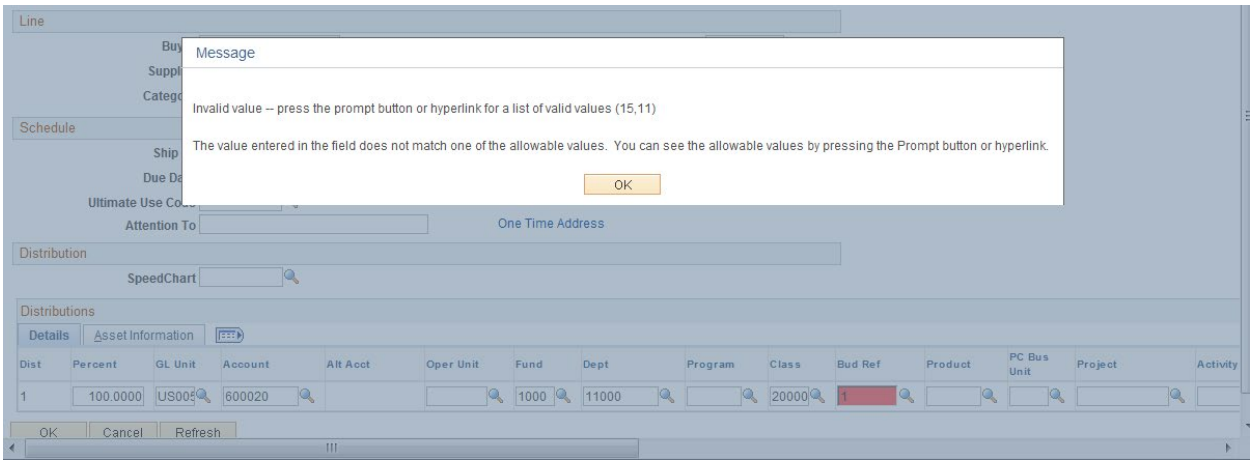
Invalid UOM.



This means the Unit of Measure selected is not in the Unit of Measure table for the Item ID. If it is a valid UOM for this Item ID, then the Office of Management and Enterprise Services (OMES) will need to add it, or you may need to select a different Item ID. The Req/PO cannot be saved.

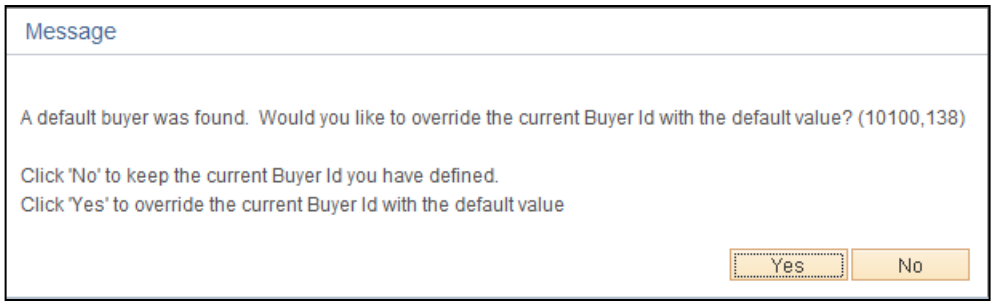
Flag Modifications

Invalid ChartField.



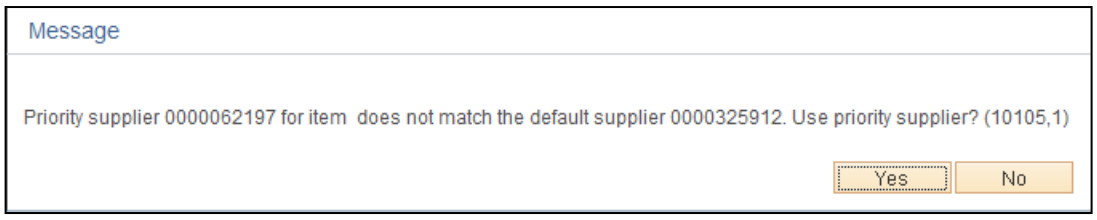
This message means the ChartField value that was input is incorrect. The REQ/PO cannot be saved.

Default Buyer Not Found.



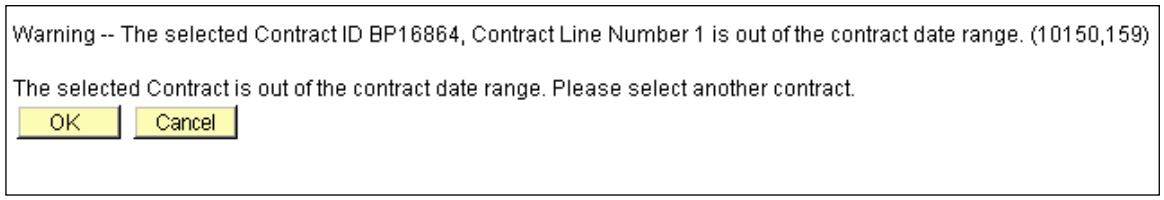
The message "A default buyer was found" is due to changing the default buyer in the Line Detail page. If you want to use the default supplier from the Item ID, then select No. If you want to use the buyer you have selected, then select Yes. You do not receive this message if you populate the Buyer in the Header Default page first.

Priority Supplier for Item Does Not Match Default Supplier.



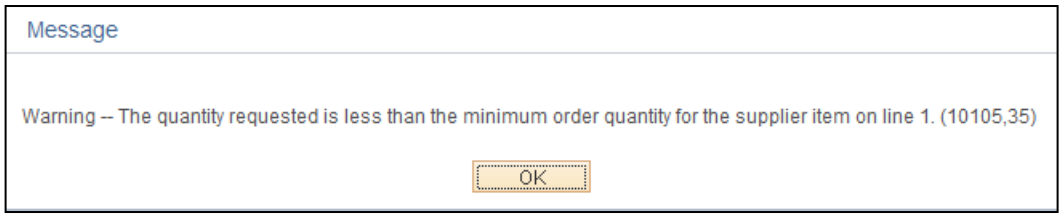
This message states that this Item ID has a priority supplier that is different than the supplier you inputted in the Header Default. Do you want to use your supplier or the priority supplier? To use your supplier, select No. To use the Item ID priority supplier, select Yes.

Contract Selected Out of Contract Data Range.



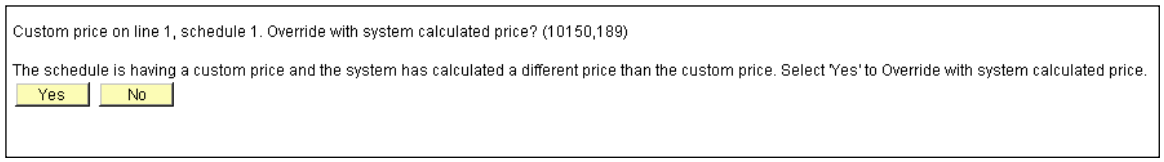
This message is received when a statewide contract is being copied into a Requisition or PO that has expired or has not begun.

Contract Below Minimum Quantity or Exceeds Maximum Quantity.



Receive this message when a quantity entered on the form page does not meet the minimum quantity on the statewide contract. To prevent this, enter the QTY on the PO Form page first.

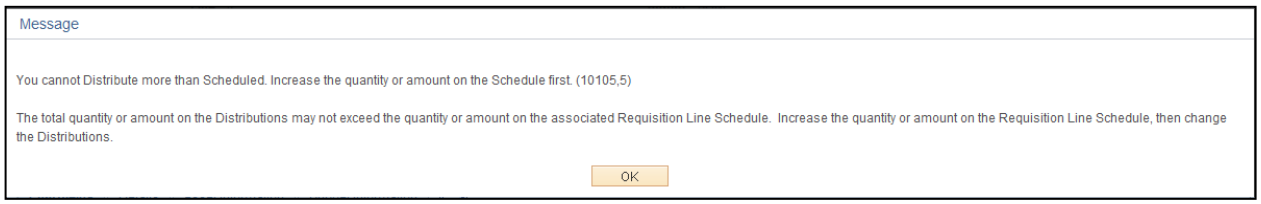
Custom Price Override.



The price inputted is the custom price (your price). The system calculates a custom price (standard) based upon Item ID, Priority Suppliers or Contracts.

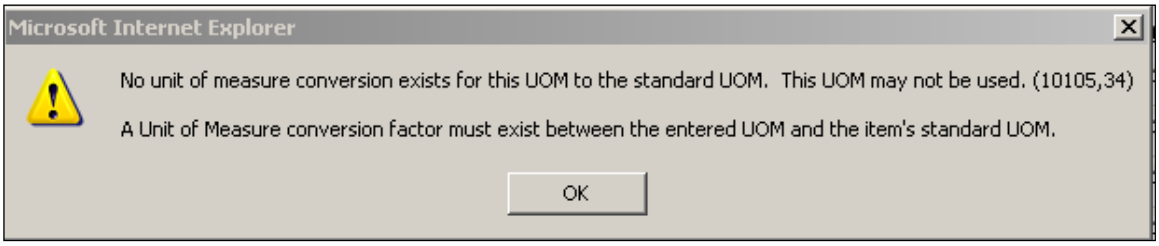
Select Yes to use your price.

Multiple Distributions in the Default Header.



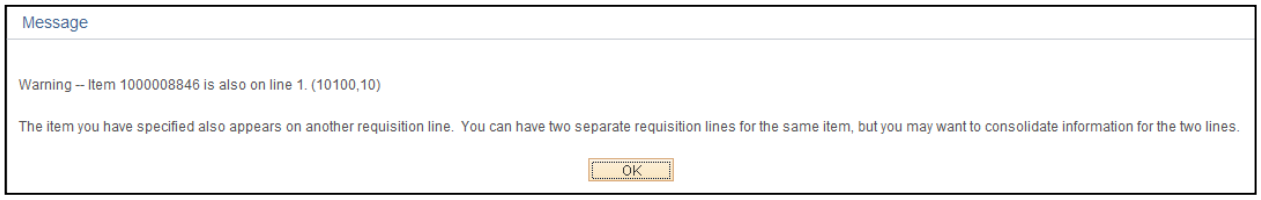
If you have multiple distributions in the default header and you use the amount only field, you receive a message when adding the next schedule and select Refresh.

UOM Error Message.



The problem is the requisition copied contains an Item ID “CPY” which is not in the UOM table. Upon changing the quantity, the message "No unit of measure conversion exists for this UOM to the standard UOM. This UOM cannot be used." was received. It does allow the user to save it, but the data will not update correctly. Tested this in QA by adding the UOM and it copied in correctly. If this is not attached to a contract, change the Item ID to a different one or have the Office of Management and Enterprise Services (OMES) add the Item ID.

Item ID Message.



This message is received when you add a second Line Item and use the same Item ID. Select OK and either accept the duplicate Item ID or combine the two lines into one.

Select to Return to Table of Contents