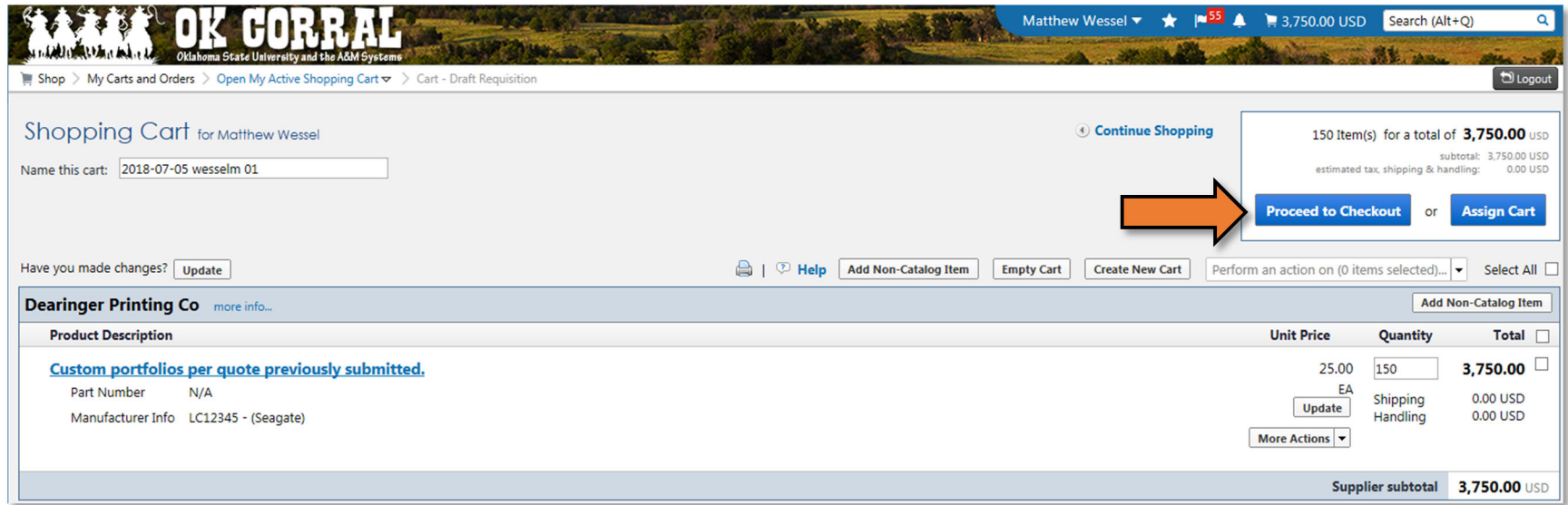


Completing Proceed to Check-out Process

1. When finished adding item to your cart, click “Proceed to Check-out”



Shopping Cart for Matthew Wessel

Name this cart:

[Continue Shopping](#)

150 Item(s) for a total of **3,750.00** USD
subtotal: 3,750.00 USD
estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart](#)

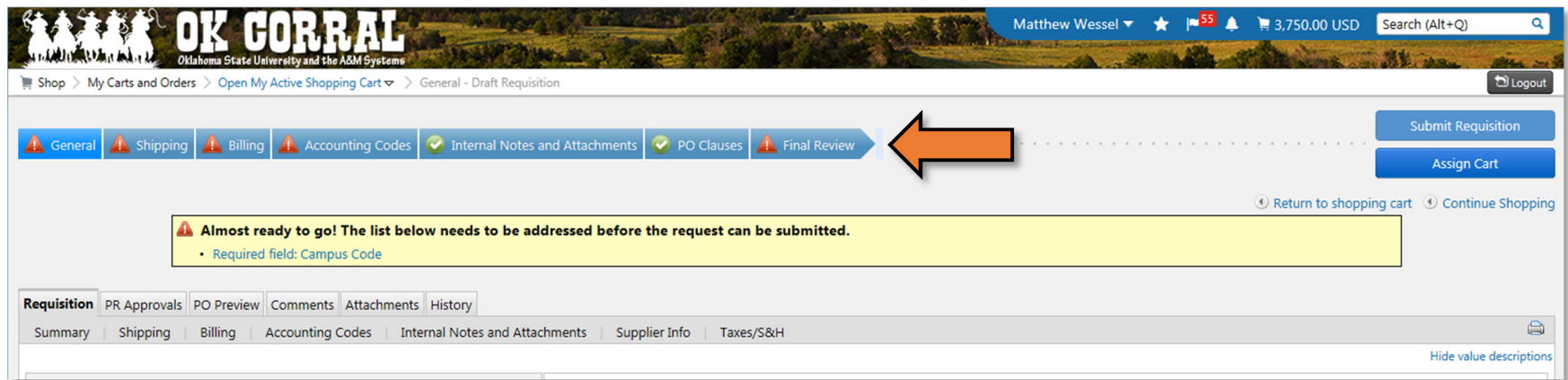
Have you made changes? [Update](#)

[Help](#) [Add Non-Catalog Item](#) [Empty Cart](#) [Create New Cart](#) Perform an action on (0 items selected)... [Select All](#)

Dearinger Printing Co [more info...](#) [Add Non-Catalog Item](#)

| Product Description | Unit Price | Quantity | Total |
|---|------------------------------|----------|---------------------|
| Custom portfolios per quote previously submitted. | 25.00 | 150 | 3,750.00 |
| Part Number N/A | EA | | |
| Manufacturer Info LC12345 - (Seagate) | Update | Shipping | 0.00 USD |
| | More Actions | Handling | 0.00 USD |
| Supplier subtotal | | | 3,750.00 USD |

2. While completing your requisition, the “Progression Bar” at the top of the screen will tell you which information is still needed before you can submit your requisition.



Matthew Wessel [55](#) [3,750.00 USD](#) [Search \(Alt+Q\)](#) [Logout](#)

[Shop](#) > [My Carts and Orders](#) > [Open My Active Shopping Cart](#) > [General - Draft Requisition](#)

[General](#) [Shipping](#) [Billing](#) [Accounting Codes](#) [Internal Notes and Attachments](#) [PO Clauses](#) [Final Review](#) [Submit Requisition](#) [Assign Cart](#)

[Return to shopping cart](#) [Continue Shopping](#)

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Campus Code

[Requisition](#) [PR Approvals](#) [PO Preview](#) [Comments](#) [Attachments](#) [History](#)

[Summary](#) [Shipping](#) [Billing](#) [Accounting Codes](#) [Internal Notes and Attachments](#) [Supplier Info](#) [Taxes/S&H](#) [Hide value descriptions](#)

3. In the “General” section, click edit.

GeneralShippingBillingAccounting CodesInternal Notes and AttachmentsPO ClausesFinal Review

Submit RequisitionAssign Cart

Return to shopping cartContinue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Campus Code

RequisitionPR ApprovalsPO PreviewCommentsAttachmentsHistory

SummaryShippingBillingAccounting CodesInternal Notes and AttachmentsSupplier InfoTaxes/S&H

Hide value descriptions

General?

These values apply to all lines unless specified by line item

| | | |
|---------------------------------|-----------------------|------|
| Cart Name | 2018-07-05 wesselm 01 | edit |
| Description | no value | |
| Requestor | Matthew Wessel | |
| Priority | Normal | |
| Shopper | Matthew Wessel | |
| Employee Family Owned Business | x | |
| Certificate of Completion | x | |
| Non Tax-Exempt | x | |
| Purchasing Contact | no value | |
| Contract # | no value | |
| Bid Code | no value | |
| Campus Code | no value | |
| Board Approval | no value | |
| Contract For Signature Attached | x | |
| Cost Match Invoices Only? | x | |
| PO Distribution Bypass | x | |

4. Click “Select from all values...” in the “Campus Code” section.

- a. If you are not able to click “select from all values”, you may not have the requester role and once you have completed the rest of the information you fill out in the requisition you will need to assign the cart to your department’s designated requester.

The screenshot shows a requisition form with a progress bar at the top containing tabs: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, PO Clauses, and Final Review. The 'General' tab is active. A yellow warning box states: "Almost ready to go! The list below needs to be addressed before the request can be submitted. • Required field: Campus Code". Below this, a modal window titled "General" is open, displaying various fields. The "Campus Code" field is highlighted with a yellow background and a red error icon, with a red arrow pointing to it. The field contains the text "Select from all values..." and "Required field". Other fields in the modal include "Cart Name" (2018-07-05 wesselm 01), "Description", "Requestor" (Matthew Wessel), "Priority" (Normal), "Shopper" (Matthew Wessel), "Employee Family Owned Business", "Certificate of Completion", "Non Tax-Exempt", "Purchasing Contact", "Contract #", "Bid Code", "Board Approval", "Contract For Signature Attached", "Cost Match Invoices Only?", and "PO Distribution Bypass". The modal has "Save" and "Cancel" buttons at the bottom. The background form has buttons for "Submit Requisition", "Assign Cart", "Return to shopping cart", and "Continue Shopping".

5. Select you campus code from the drop down menu.

General Shipping Billing Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Campus Code

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Internal Notes and Attachments Supplier Info Taxes/S&H

General ? X

Cart Name 2018-07-05 wesselm 01

Description

Requestor Matthew Wessel

Priority Normal

Shopper Matthew Wessel
[Select a different user...](#)

Employee Family Owned Business ☐

Certificate of Completion ☐

Non Tax-Exempt ☐

Purchasing Contact

Contract #

Bid Code

Campus Code

Board Approval

Contract For Signature Attached

Cost Match Invoices Only?

PO Distribution Bypass

1 - General University
2 - Agricultural Experiment
3 - Agricultural Extension
4 - Institute of Technology
5 - Veterinary Medicine
6 - Oklahoma City
7 - Center for Health Sciences
8 - Tulsa
9 - CIED
C - Connors State College
L - Langston University
M - Medical Authority
N - NEO
P - Panhandle State

For selected line items Add to Favorites Go

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6. Once you have selected your campus code, click “Save”.

The screenshot shows a requisition form with a 'General' modal open. The modal contains the following fields and values:

- Cart Name: 2018-07-05 wesselm 01
- Description: (empty)
- Requestor: Matthew Wessel
- Priority: Normal
- Shopper: Matthew Wessel
- Employee Family Owned Business: ☐
- Certificate of Completion: ☐
- Non Tax-Exempt: ☐
- Purchasing Contact: (empty)
- Contract #: (empty)
- Bid Code: (empty)
- Campus Code: 1 (highlighted with a yellow background and a red error message 'Required field')
- Board Approval: (empty)
- Contract For Signature Attached: ☐
- Cost Match Invoices Only?: ☐
- PO Distribution Bypass: ☐

An orange arrow points to the 'Save' button at the bottom of the modal. The background form shows a progress bar with steps: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, PO Clauses, and Final Review. A warning message at the top states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted. Required field: Campus Code'.

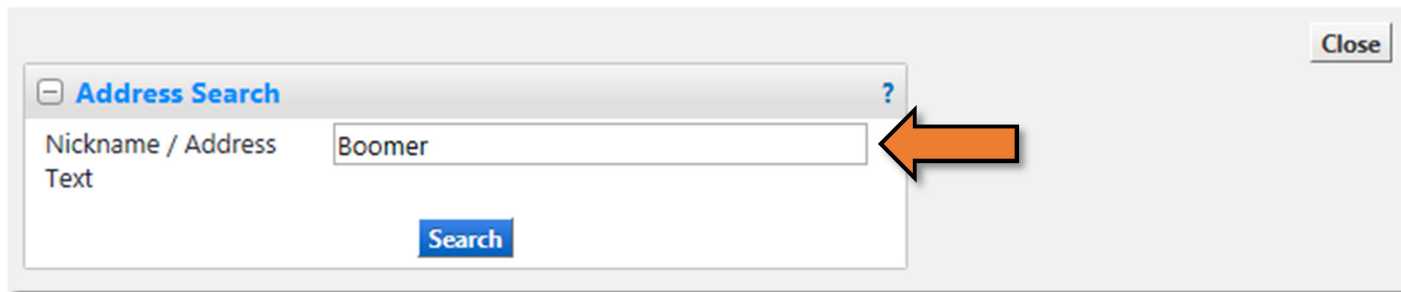
7. In the shipping section click “edit”.

The screenshot shows a requisition form with a top navigation bar containing tabs: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, PO Clauses, and Final Review. The 'Shipping' tab is active. Below the navigation bar, there are buttons for 'Submit Requisition' and 'Assign Cart'. A yellow warning box states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted. • Required field: Shipping address'. Below this, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. The 'Shipping' tab is selected. Below these tabs, there are more tabs: 'Summary', 'Shipping', 'Billing', 'Accounting Codes', 'Internal Notes and Attachments', 'Supplier Info', and 'Taxes/S&H'. The 'Shipping' tab is selected. The main content area shows the 'Shipping' section with a sub-header 'Ship To' and a description 'These values apply to all lines unless specified by line item'. Below this, there is a 'Shipping address' field with a yellow warning box: 'no address Required field'. An orange arrow points to the 'edit' button next to the 'Shipping address' field. Below the 'Shipping address' field, there is a 'Delivery Options' section with a sub-header 'Expedite' and a description 'These values apply to all lines unless specified by line item'. Below this, there is a 'Ship Via' field with a value 'Best Carrier-Best Way' and a 'Requested Delivery Date' field with a value 'no value'. An orange arrow points to the 'edit' button next to the 'Ship Via' field.

8. Click “select from org addresses”.

The screenshot shows the same requisition form as in the previous image, but with a modal dialog box open. The dialog box has a title 'Ship To' and a sub-header 'No User Addresses'. Below this, there is a description: 'Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.' Below the description, there is a 'Shipping address' field with a value 'select from org addresses'. An orange arrow points to the 'select from org addresses' text. Below the 'Shipping address' field, there is a 'Cancel' button.

9. Search for your address by entering all or part of your address in the search box.



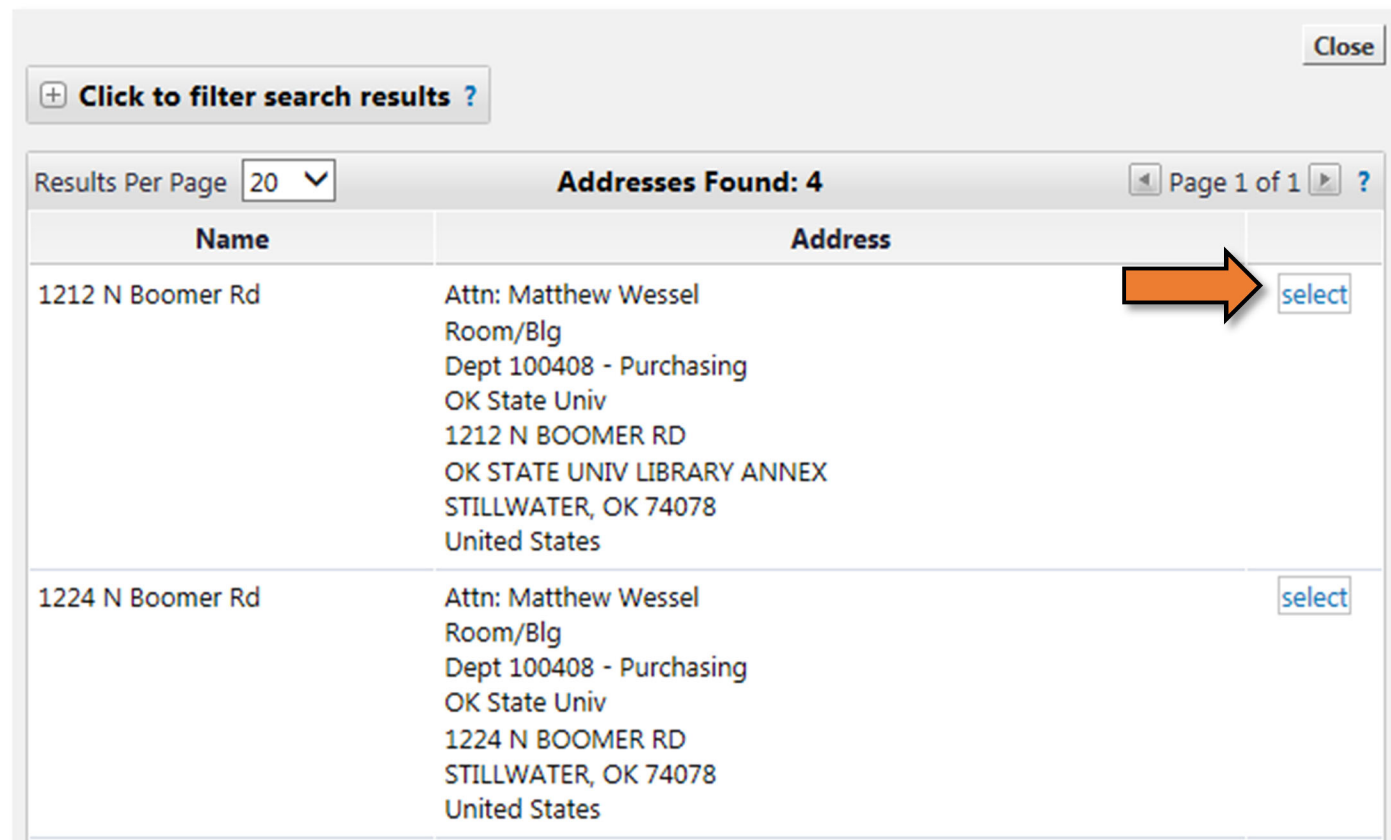
Close

Address Search ?

Nickname / Address Text

[Search](#)

10. Select your address from the search results.



Close

Click to filter search results ?

Results Per Page **Addresses Found: 4** Page 1 of 1 ?

| Name | Address | |
|------------------|---|------------------------|
| 1212 N Boomer Rd | Attn: Matthew Wessel Room/Blg Dept 100408 - Purchasing OK State Univ 1212 N BOOMER RD OK STATE UNIV LIBRARY ANNEX STILLWATER, OK 74078 United States | select |
| 1224 N Boomer Rd | Attn: Matthew Wessel Room/Blg Dept 100408 - Purchasing OK State Univ 1224 N BOOMER RD STILLWATER, OK 74078 United States | select |

11. Enter your room number or name in the "Room/Blg" field.

Ship To ? X

No User Addresses

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address [select from org addresses](#)

Address Details

| | |
|----------------|---------------------|
| Attn: | Matthew Wessel |
| Room/Blg | Matt's Office |
| Dept | 100408 - Purchasing |
| Address Line 1 | OK State Univ |
| Address Line 2 | 1224 N BOOMER RD |
| City | STILLWATER |
| State | OK |
| Zip Code | 74078 |
| Country | United States |

☐ Save this address for future use

Save Cancel

12. In the “Billing” Section click “edit” next to the “Bill To” field.

GeneralShippingBillingAccounting CodesInternal Notes and AttachmentsPO ClausesFinal Review

Submit RequisitionAssign Cart

Return to shopping cartContinue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

RequisitionPR ApprovalsPO PreviewCommentsAttachmentsHistory

SummaryShippingBillingAccounting CodesInternal Notes and AttachmentsSupplier InfoTaxes/S&H

Hide value descriptions

Bill To

These values apply to all lines unless specified by line item.

Bill To

Billing address

Oklahoma State University
University Accounting
405-744-5865
304 Whitehurst
Stillwater, OK 74078
United States

edit

Credit Card Info

No credit card has been assigned.

Billing Options

Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

no valueRequired field

Received Purchasing approval prior to submitting requisition for next fiscal period.

edit

13. Select your billing address from the drop down.

General Shipping **Billing** Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition
Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping **Billing** Accounting Codes Internal Notes and Attachments Supplier Info Taxes/S&H

Hide value descriptions

Billing

These values apply to all lines unless specified by line item.

Bill To

Complete the fields below to enter your billing address for this order. If you need to make a change, select a different address from the available options.

Billing address select from your addresses

select from org addresses

Address Details

Contact Line 1 Connors Warner

Contact Line 2 Langston

Contact Line 3 NEO Miami

Address Line 1 OK Panhandle State Univ

City OSU Oklahoma City

State OSU Stillwater


Zip Code OSU Tulsa

Country Okmulgee IT

74078

United States

Save Cancel



14. Enter the email address of the person in your department the invoices need to be sent to in the “Email” field, then click “Save”.
- a. Please note: This step is only available to the OSU Stillwater campus.

Bill To ? X


Complete the fields below to enter your billing address for this order. If you need to make a change, select a different address from the available options.

Billing address select from your addresses
OSU Stillwater ▼

To choose a different address, [click here](#)

Address Details

| | |
|----------------|--|
| Contact Line 1 | Oklahoma State University |
| Contact Line 2 | University Accounting |
| Contact Line 3 | 405-744-5865 |
| Email: | <input type="text" value="matt.wessel@okstate.edu"/> |
| Address Line 1 | 304 Whitehurst |
| City | Stillwater |
| State | OK |
| Zip Code | 74078 |
| Country | United States |



15. Click “edit” next to the “Billing Options” section.

General Shipping **Billing** Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition
Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.
• Required field: Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping **Billing** Accounting Codes Internal Notes and Attachments Supplier Info Taxes/S&H

Hide value descriptions

Billing

These values apply to all lines unless specified by line item

Bill To
Billing address Oklahoma State University
University Accounting
405-744-5865
304 Whitehurst
Stillwater, OK 74078
United States

Credit Card Info
No credit card has been assigned.

Billing Options
Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)
Received Purchasing approval prior to submitting requisition for next fiscal period.

Required field

edit

16. Click “Select from all values...”

Billing Options

Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

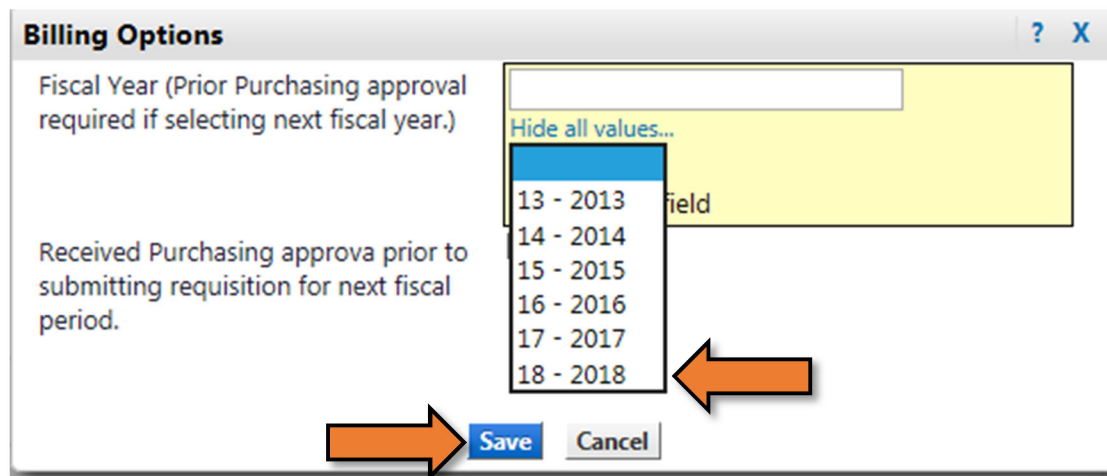
Received Purchasing approval prior to submitting requisition for next fiscal period.

Required field

Select from all values...

Save Cancel

17. Select the correct fiscal year from the drop down and click “Save”.



Billing Options ? X

Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)

Received Purchasing approval prior to submitting requisition for next fiscal period.

Hide all values...

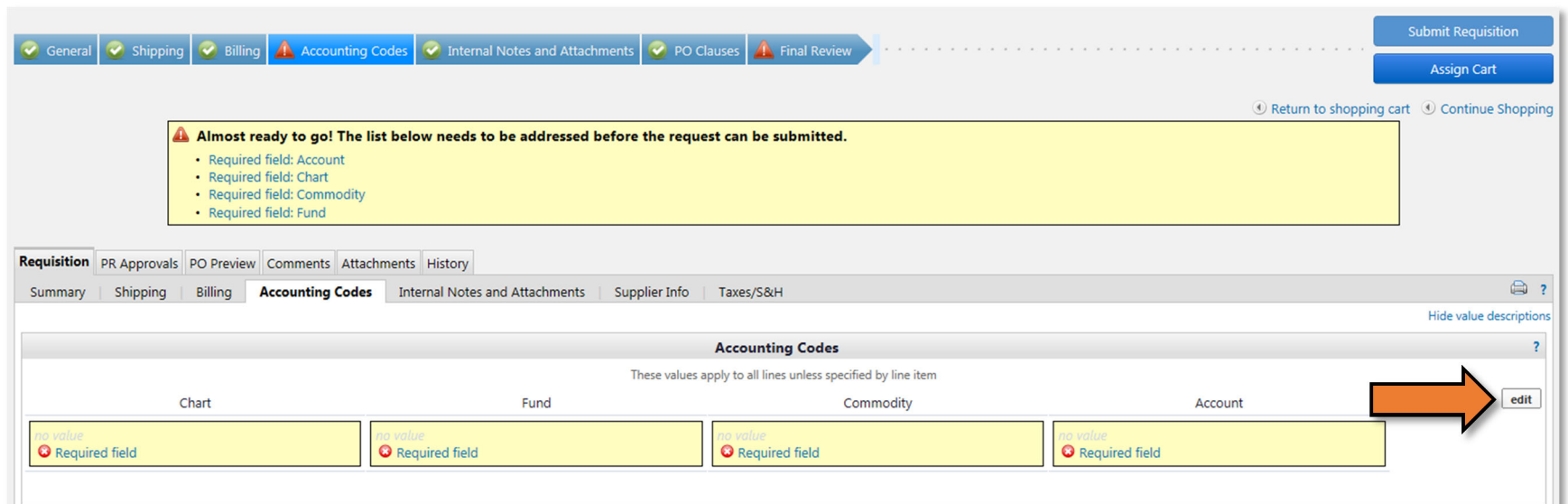
- 13 - 2013
- 14 - 2014
- 15 - 2015
- 16 - 2016
- 17 - 2017
- 18 - 2018

field

Save Cancel

An orange arrow points to the 'Save' button. Another orange arrow points to the '18 - 2018' option in the fiscal year dropdown menu.

18. From the accounting section, click “edit”.



General Shipping Billing Accounting Codes Internal Notes and Attachments PO Clauses Final Review Submit Requisition Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account
- Required field: Chart
- Required field: Commodity
- Required field: Fund

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Internal Notes and Attachments Supplier Info Taxes/S&H

Hide value descriptions

Accounting Codes ?

These values apply to all lines unless specified by line item

| Chart | Fund | Commodity | Account |
|----------------------------|----------------------------|----------------------------|----------------------------|
| no value Required field | no value Required field | no value Required field | no value Required field |

edit

An orange arrow points to the 'edit' button.

19. Click "Select from all values..." in the "Chart" section.

The screenshot shows the 'Accounting Codes' form with four input fields: Chart, Fund, Commodity, and Account. Each field has a 'no value' status and a 'Required field' error message. A red arrow points to the 'Select from all values...' link in the Chart field. The 'Account' field also has an 'add split' link. At the bottom right, there is a 'recalculate / validate values' link. At the bottom center, there are 'Save' and 'Cancel' buttons.

20. Select your chart from the drop down.

The screenshot shows the 'Accounting Codes' form with the Chart dropdown menu open. The menu lists various institutions, including '1 - Oklahoma State - General Un...', '2 - Agricultural Experiment Sta...', '3 - OSU Cooperative Extension', '4 - OSU Institute of Technology', '5 - Ctr for Veterinary Health S...', '6 - OSU - Oklahoma City', '7 - Center for Health Sciences', '8 - OSU - Tulsa', '9 - OSU-Research Foundation', 'C - Connors State College', 'L - Langston University', 'M - OSU Medical Authority', 'N - NEO A & M', and 'P - Oklahoma Panhandle State Un...'. A red arrow points to the dropdown menu. The 'Account' field has an 'add split' link. At the bottom right, there is a 'recalculate / validate values' link. At the bottom center, there are 'Save' and 'Cancel' buttons.

21. Click "Select from all values..." in the "Fund" section.

The screenshot shows the 'Accounting Codes' form with four input fields: Chart, Fund, Commodity, and Account. Each field has a 'no value' status and a 'Required field' error message. A red arrow points to the 'Select from all values...' link in the Fund field. The 'Account' field also has an 'add split' link. At the bottom right, there is a 'recalculate / validate values' link. At the bottom center, there are 'Save' and 'Cancel' buttons.

22. Search for your fund by either entering the fund number in the “Value” field or fund name in the “Description” field, then click “Search”.



Close

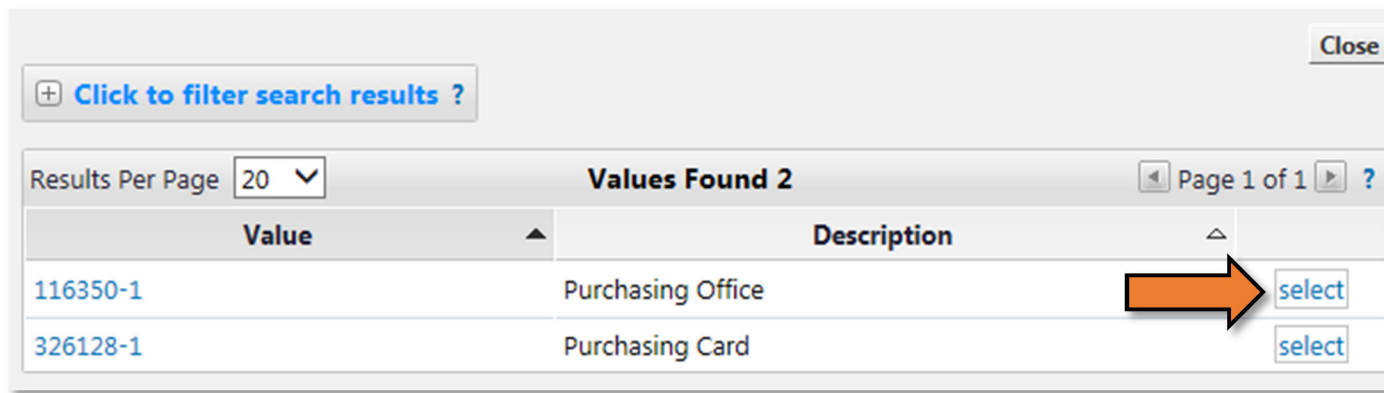
Custom Field Search ?

Value

Description

Search

23. Select your fund from the search results.



Close

+ Click to filter search results ?

Results Per Page 20 Values Found 2 Page 1 of 1 ?

| Value | Description | |
|----------|-------------------|------------------------|
| 116350-1 | Purchasing Office | select |
| 326128-1 | Purchasing Card | select |

24. Click “Select from all values...” in the “Commodity” section.



Accounting Codes ? X

Chart Fund Commodity Account add split

1
no value
Select from all values...
Required field

116350-1
no value
Select from all values...
Required field

no value
Select from all values...
Required field

no value
Select from all values...
Required field

recalculate / validate values

Save Cancel

25. Select your commodity code from the drop down.

The screenshot shows the 'Accounting Codes' form with the 'Commodity' dropdown menu open. The menu lists various commodity codes such as 'Bldgs Constructn/Renov/Rental - Construction, Renovations, ...', 'Communications and Utilities - Telephone, Shipping Service...', 'Computer Hardware - Computer Hardware', 'Computer Software and Services - includes Software under \$500', 'Equipment Rental - Machine and Equipment Renta...', 'Equipment, Construction - Equipment, Construction', 'Equipment, Internal Use - Motor Vehicles, Agriculture...', 'Insurance - Building Property/Equipment...', 'Lab and Research Testing, Doctors, Lawyers, Consulting, Computer Service Agreements - Lab and Research Testing, D...', 'Lab/Med/Instructional Equipmt - Lab/Med/Instructional Equipmt', 'Lab/Med/Instructional Supplies - Books/Periodicals and Lives...', 'Lodging/Catering Direct Paymt - Conference Services, Cateri...', 'Office Supplies - Office Supplies, Data Proce...', 'Services, Contractual - Subscriptions, Memberships, ...', 'Services, Other - Financial Charges, Incentiv...', 'Services, Printing and Binding - Services, Printing and Binding', 'Services, Professional - Lab and Research Testing, D...', 'Services, Repairs & Maint - Repairs and Maintenance inc...', 'Subcontracts/Subawards - Subcontracts/Subawards', 'Supplies, Misc - Food, Misc, Photographic, R...', 'Supplies/Repairs, Internal Use - Janitorial Supplies, Mainte...', 'Telecomm/AV Equipment - Telecomm/AV Equipment', and 'Z_CommodityZ3_TEST - TheCommodityZ3_TEST'. An orange arrow points to the dropdown menu.

| Chart | Fund | Commodity | Account |
|--|---|-----------|----------------------------|
| 1 Select from all values... Required field | 116350-1 Select from all values... Required field | | no value Required field |

Accounting Codes (same as header)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The

total 3,750.00
0.00
total 3,750.00 USD

edit

recalculate / validate values

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26. Click "Select from all values..." in the "Account" section.

The screenshot shows the 'Accounting Codes' form with the 'Account' dropdown menu open. The menu lists various account codes such as '703010 - Off Supp-Printing', '703020 - Off Supp-Non-Exp', '703030 - Off Supp-Expendable', '703100 - Cmptr Sup D/Process', and '709268 - Part Misc-Off Supp'. An orange arrow points to the dropdown menu.

| Chart | Fund | Commodity | Account |
|--------------------------------|---------------------------------------|--|---|
| 1 Select from all values... | 116350-1 Select from all values... | Office Supplies Select from all values... | no value Select from all values... Required field |

Save Cancel

recalculate / validate values

27. Select your account from the drop down.

The screenshot shows the 'Accounting Codes' form with the 'Account' dropdown menu open. The menu lists various account codes such as '703010 - Off Supp-Printing', '703020 - Off Supp-Non-Exp', '703030 - Off Supp-Expendable', '703100 - Cmptr Sup D/Process', and '709268 - Part Misc-Off Supp'. An orange arrow points to the dropdown menu.

| Chart | Fund | Commodity | Account |
|--|---|--|--------------------------------|
| 1 Select from all values... Required field | 116350-1 Select from all values... Required field | Office Supplies Select from all values... Required field | no value Hide all values... |

Save Cancel

a. If you have questions regarding the “Account Codes”, please contact University Accounting.

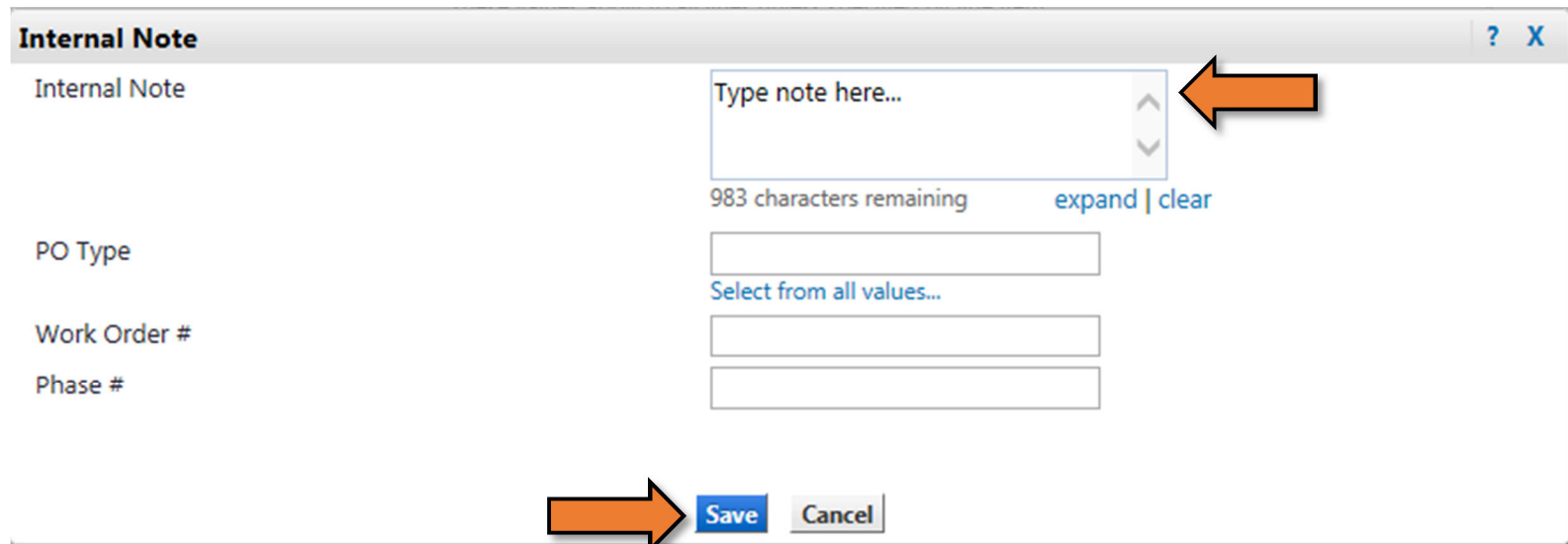
28. Once you have selected your chart, fund, commodity and account click “Save”.

The screenshot shows the 'Accounting Codes' form. It has four main columns: Chart, Fund, Commodity, and Account. The Chart column contains '1' with a link 'Select from all values...'. The Fund column contains '116350-1' with a link 'Select from all values...'. The Commodity column contains 'Office Supplies' with a link 'Select from all values...'. The Account column contains '703030' with a link 'Select from all values...' and a red error icon with the text 'Required field'. Below the Account column is a link 'recalculate / validate values'. At the bottom right, there are 'Save' and 'Cancel' buttons. A large orange arrow points from the bottom center towards the 'Save' button.

29. If an internal note is necessary, click “edit” in the “Internal Notes and Attachments” section.

The screenshot shows the 'Requisition' form. At the top, there is a progress bar with steps: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments (current step), PO Clauses, and Final Review. To the right of the progress bar are buttons for 'Submit Requisition' and 'Assign Cart'. Below the progress bar is a yellow box with a green checkmark and the text: 'You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: PO Clauses. Go straight to the end: Final Review.' Below this is a tabbed interface with tabs: Requisition, PR Approvals, PO Preview, Comments, Attachments, History, Summary, Shipping, Billing, Accounting Codes, Internal Notes and Attachments (selected), Supplier Info, and Taxes/S&H. The 'Internal Notes and Attachments' tab is active, showing a section titled 'Internal Notes and Attachments' with a sub-header 'These values apply to all lines unless specified by line item'. Below this, there is a table with columns 'Internal Note', 'Internal Attachments', 'Size', and 'Attached on'. The 'Internal Note' column contains 'no note'. The 'Internal Attachments' column contains 'no value'. The 'Size' column contains 'no value'. The 'Attached on' column contains 'no value'. There is an 'Add Attachments' button. An 'edit' button is located to the right of the 'Internal Note' field. A large orange arrow points from the right side towards the 'edit' button.

30. Type your note in the “Internal Note” text field and click “Save”.



The screenshot shows a dialog box titled "Internal Note" with a standard window header containing a question mark and a close button (X). The dialog contains several input fields: a large text area for the "Internal Note" (placeholder: "Type note here..."), a "PO Type" dropdown menu (placeholder: "Select from all values..."), a "Work Order #" text field, and a "Phase #" text field. Below these fields are two buttons: "Save" and "Cancel". Two orange arrows are overlaid on the image: one points to the "Internal Note" text field, and the other points to the "Save" button. Below the text field, the text "983 characters remaining" and the links "expand | clear" are visible.

Internal Note ? X

Internal Note

Type note here...

983 characters remaining expand | clear

PO Type

Select from all values...

Work Order #

Phase #

Save Cancel

31. If you need to attach a document (quote from supplier, etc.) click “Add Attachments” in the “Internal Notes and Attachments” section.

General Shipping Billing Accounting Codes **Internal Notes and Attachments** PO Clauses Final Review

Submit Requisition
Assign Cart

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: [PO Clauses](#). Go straight to the end: [Final Review](#).

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes **Internal Notes and Attachments** Supplier Info Taxes/S&H

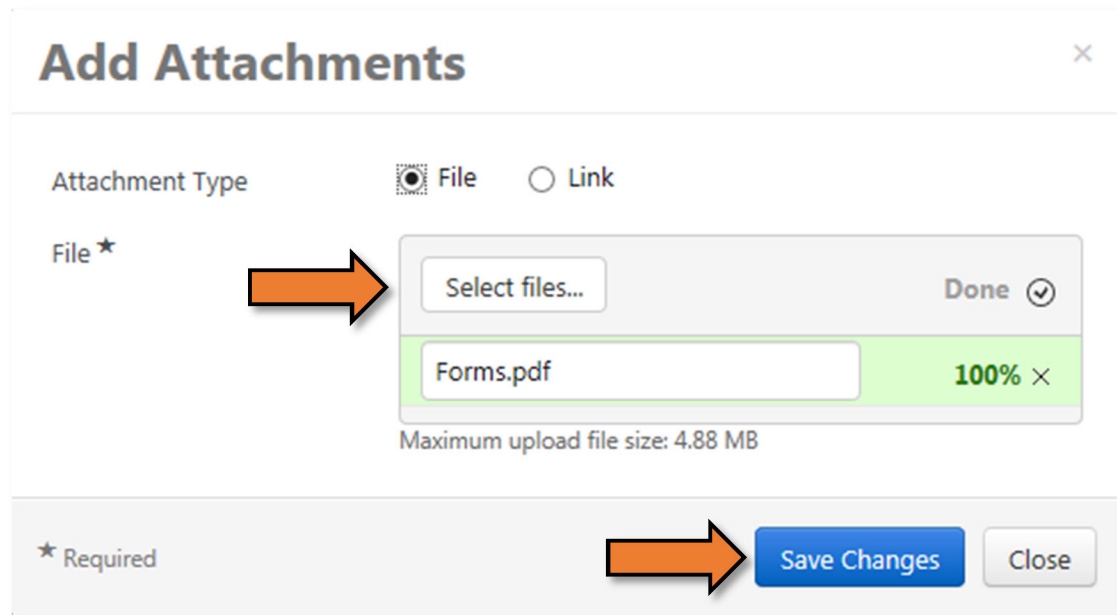
Hide value descriptions

Internal Notes and Attachments ?

These values apply to all lines unless specified by line item

| | | |
|----------------------|----------|------|
| Internal Note | no note | edit |
| Internal Attachments | | |
| Add Attachments | | |
| PO Type | no value | |
| Work Order # | no value | |
| Phase # | no value | |

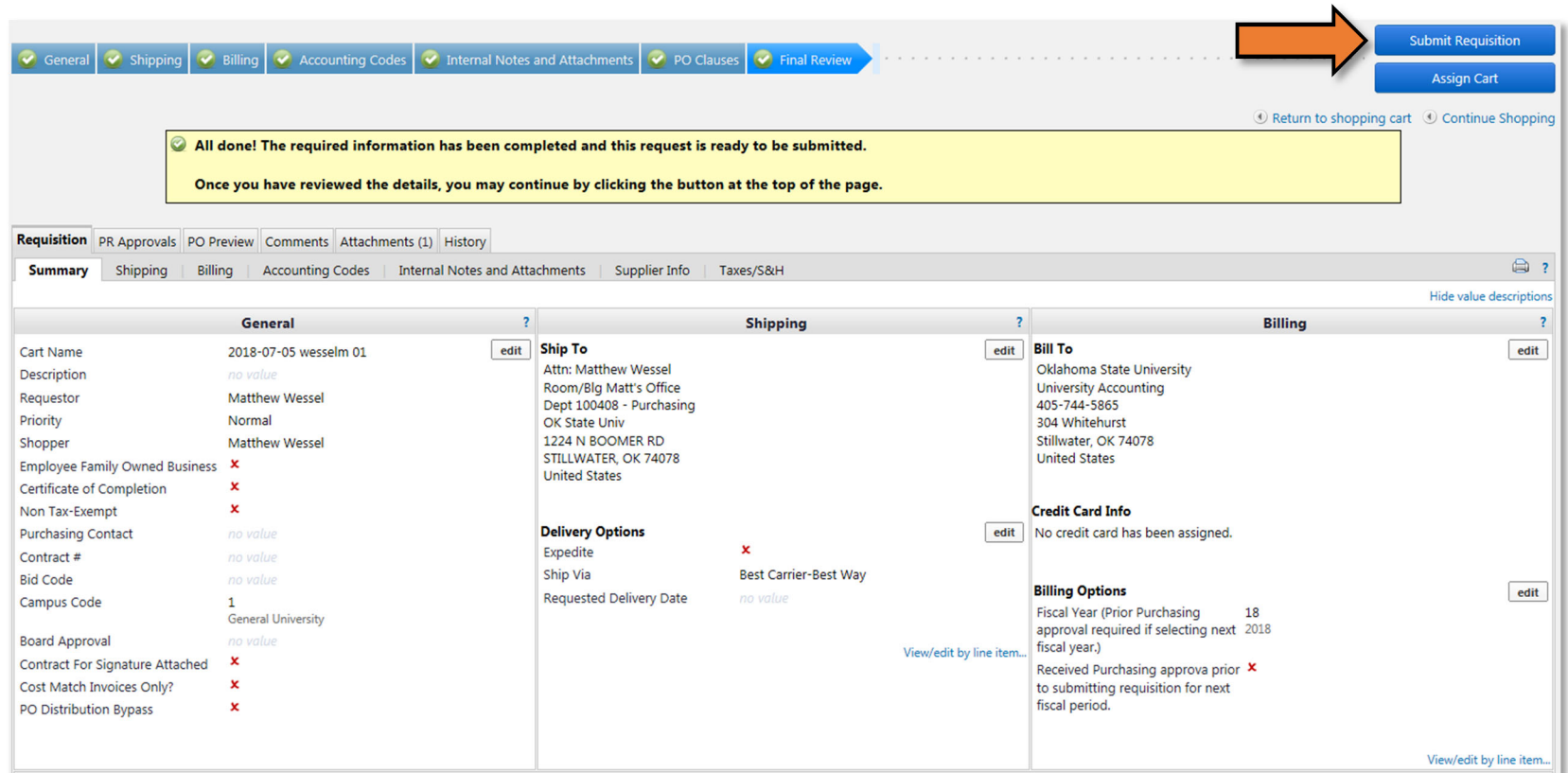
32. Select your attachment(s) by either clicking “Select files...” and browsing for your file or clicking and dragging your file into the gray box.
- a. Once you have selected all your attachments, click “Save Changes”.



The screenshot shows a dialog box titled "Add Attachments" with a close button (X) in the top right corner. Below the title, there is a section for "Attachment Type" with two radio buttons: "File" (selected) and "Link". Under the "File" section, there is a "File" label with a star icon. To the right of this label is a large gray box containing a "Select files..." button and a "Done" button with a checkmark icon. Below the gray box, a file named "Forms.pdf" is listed with a green progress bar indicating "100%" completion. Below the file list, it states "Maximum upload file size: 4.88 MB". At the bottom of the dialog, there is a "★ Required" label and two buttons: "Save Changes" (highlighted with an orange arrow) and "Close".

33. Once you have all your information entered (all fields in the “Progression Bar” will be green), click final review in the “Progression Bar”.

a. Review all information to insure it is correct, then click “Submit Requisition”.



Progression Bar: General (✓) Shipping (✓) Billing (✓) Accounting Codes (✓) Internal Notes and Attachments (✓) PO Clauses (✓) Final Review (✓)

Buttons: Submit Requisition, Assign Cart

Message: All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Navigation: Return to shopping cart, Continue Shopping

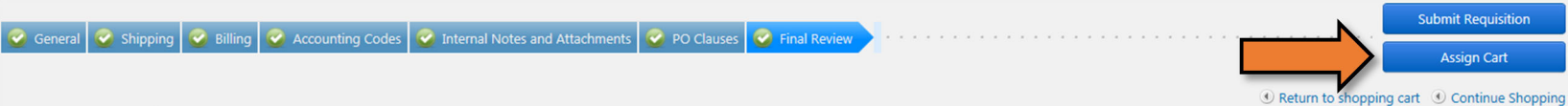
Requisition Summary: PR Approvals, PO Preview, Comments, Attachments (1), History

Summary: Shipping, Billing, Accounting Codes, Internal Notes and Attachments, Supplier Info, Taxes/S&H

| General | Shipping | Billing |
|---|--|---|
| Cart Name 2018-07-05 wesselm 01 edit | Ship To Attn: Matthew Wessel Room/Blg Matt's Office Dept 100408 - Purchasing OK State Univ 1224 N BOOMER RD STILLWATER, OK 74078 United States edit | Bill To Oklahoma State University University Accounting 405-744-5865 304 Whitehurst Stillwater, OK 74078 United States edit |
| Description no value | Delivery Options Expedite Ship Via Best Carrier-Best Way Requested Delivery Date no value View/edit by line item... | Credit Card Info No credit card has been assigned. |
| Requestor Matthew Wessel | | Billing Options Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.) Received Purchasing approval prior to submitting requisition for next fiscal period. edit |
| Priority Normal | | |
| Shopper Matthew Wessel | | |
| Employee Family Owned Business ✗ | | |
| Certificate of Completion ✗ | | |
| Non Tax-Exempt ✗ | | |
| Purchasing Contact no value | | |
| Contract # no value | | |
| Bid Code no value | | |
| Campus Code 1 General University | | |
| Board Approval no value | | |
| Contract For Signature Attached ✗ | | |
| Cost Match Invoices Only? ✗ | | |
| PO Distribution Bypass ✗ | | |

b. If you need to assign your cart to your department’s designated requester proceed to step 33.

34. To assign your cart to a requester, click “Assign Cart”



General Shipping Billing Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition
Assign Cart

Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments (1) History

Summary Shipping Billing Accounting Codes Internal Notes and Attachments Supplier Info Taxes/S&H

| General | | Shipping | | Billing | |
|---------------------------------|-----------------------|--------------------------|-----------------------|-------------------------------------|------|
| Cart Name | 2018-07-05 wesselm 01 | Ship To | | Bill To | |
| Description | no value | Attn: Matthew Wessel | | Oklahoma State University | |
| Requestor | Matthew Wessel | Room/Blg Matt's Office | | University Accounting | |
| Priority | Normal | Dept 100408 - Purchasing | | 405-744-5865 | |
| Shopper | Matthew Wessel | OK State Univ | | 304 Whitehurst | |
| Employee Family Owned Business | x | 1224 N BOOMER RD | | Stillwater, OK 74078 | |
| Certificate of Completion | x | STILLWATER, OK 74078 | | United States | |
| Non Tax-Exempt | x | United States | | | |
| Purchasing Contact | no value | Delivery Options | | Credit Card Info | |
| Contract # | no value | Expedite | x | No credit card has been assigned. | |
| Bid Code | no value | Ship Via | Best Carrier-Best Way | | |
| Campus Code | 1 | Requested Delivery Date | no value | Billing Options | |
| Board Approval | General University | | | Fiscal Year (Prior Purchasing | 18 |
| Contract For Signature Attached | x | | | approval required if selecting next | 2018 |
| Cost Match Invoices Only? | x | | | fiscal year.) | |
| PO Distribution Bypass | x | | | Received Purchasing approval prior | x |
| | | | | to submitting requisition for next | |
| | | | | fiscal period. | |

35. Click “Search for assignee”.

Assign Cart

Selected Assignee: -

Assign Cart To: [Search for an assignee](#)

Note To Assignee:

Assign **Close**

36. Search for your requester by entering information in the search criteria fields provided and clicking “Search”.

User Search [?](#)

Last Name [?](#)

First Name [?](#)



User Name [?](#)

Email [?](#)

Department [?](#)

Role [?](#)


Results Per Page



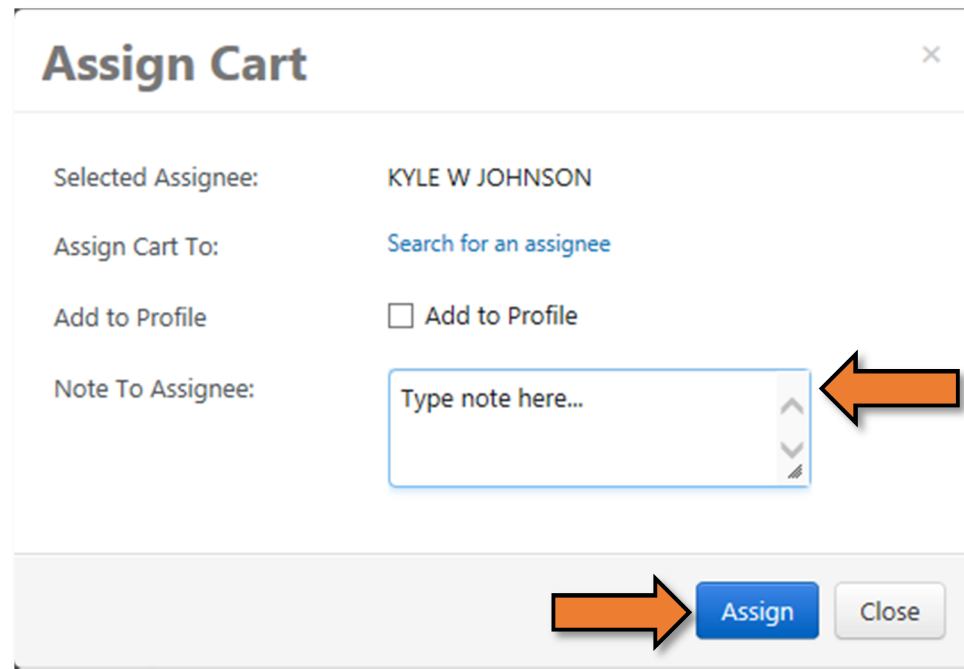
37. Click “[select]” next to your requester’s information.

[New Search](#)

| Name ^ | User Name ^ | Email ^ | Phone | Action |
|-----------------------|---------------|--------------------------|-----------------|--------------------------|
| JOHNSON, KYLE W | kwjohns_local | kyle.johnson@okstate.edu | +1 405-744-5977 | [select] |
| JOHNSON, KYLE WILLIAM | kyj | kyj@okstate.edu | +1 918-810-5576 | [select] |
| Johnson, Kyle | kwjohns | kyle.johnson@okstate.edu | +1 405-744-5977 | [select] |



38. You can add a note to the assignee by entering it in the “Note to Assignee” text field, then click “Assign”.



The image shows a dialog box titled "Assign Cart" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Selected Assignee:** KYLE W JOHNSON
- Assign Cart To:** [Search for an assignee](#)
- Add to Profile:** ☐ Add to Profile
- Note To Assignee:** A text input field with the placeholder text "Type note here...". An orange arrow points to this field from the right.

At the bottom of the dialog, there are two buttons: "Assign" (highlighted in blue) and "Close". An orange arrow points to the "Assign" button from the left.

39. You have completed your requisition.