Reference Manual

How to enter a Requisition in Oracle iProcurement

Contents

1.   Log into the system:

Using the iProcurement user ID and password.

You will be taken to your home screen which will show your menu/navigator access. To enter requisitions, click on the iProcuement home page link on the left side:

UNIVERSITY of GUELPH — iProcurement Tutorial
How to Make Online Purchase Requisitions

Enterprise Search	Contract Documents ∨		Go	Search Results

Home

Navigator

[Personalize]

▶ 📁 UofG Field Users

◢ 📁 UofG Internet Procurement

   📄 iProcurement Home Page

Worklist

[Full List]

From	Type	Subject	Sent	Due
There are no notifications in this view.				

☑ TIP Vacation Rules - Redirect or auto-respond to notifications.

Your home screen shows:
a) a list of the requisitions you have initiated
b) if you have any items in your shopping cart
c) a header section at the top

Shop | Requisitions

Home | Shopping Lists | Non-Catalog Request

Search [Main Store ∨] [   ] [Go] Advanced Search

Stores

Main Store   Exchange.Oracle.com
Main Store

Shopping Cart

Your cart is empty.

My Requisitions

[Full List]

Requisition	Description	Total (CAD)	Status	Copy	Change
1026348	Computer and server with new tax code HST-15% PRV/FED	200,000.00	Approved	🗎	

2.   Start a New Requisition:

When the shopping card is empty, click on   **Non-Catalog Request**   tab at the header to start a new requisition.   The screen will bring up a blank form to enter information of an item. This is the first line on your requisition.

Shop	Requisitions

Home | Shopping Lists | **Non-Catalog Request**

Non-Catalog Request   [Clear All] [Add to Cart] [Add to Favorites]   **Shopping Cart**
Your cart is empty.

* Indicates required field

* Item Type [dropdown]   ☐ New Supplier
  Please select "Goods or Services" unless your item(s) are quantity based with a   Supplier Name [   ]
  locked in unit price and will be billed by quantity   Site [   ]
* Item Description [   ]   Contact Name [   ]
                                                                                     Phone [   ]
* Category [   ]   Email [   ]
* Quantity [   ]
* Unit of Measure [   ]
* Unit Price [   ]
* Currency [CAD ▾]

* Any fields identified with the asterisk sign in front are mandatory entry fields.
Helpful hints and tips are shown in **blue text** to help you understand the field requirements.

2.1   Item Type:

* Item Type
 Goods or Services.I can provide description and Total Amount
  Goods.I can provide description, item price and quantity
  Services.I can provide description, rate and quantity

Depending on which Item Type you choose, the screen will update the information required:

The screens for the different Item Types:

Goods or Services:	Goods:	Services:

Note: if you use either **Goods** or **Services** item type, invoice amounts must match your quantity and pricing exactly or there will be issues with invoice payment processing. Total value entered should be before tax.

For example:

- If your order item type is "Goods or Services", the Amount is 6000, the first invoice comes in at $2,553.25 <u>before tax</u>. Payment services can match the invoice 2,553.25 to the Amount 6000 leaving the correct amount of 3446.75 available for future invoicing.
- If your order item type is "Goods", the Quantity is 1, price $6000, the first invoice comes in at quantity 1, amount $2,553.25 before tax. Payment services will not be able to match as there will be a price variance.

2.2 Supplier Name:

The next field which should be entered is the Supplier information. This is a mandatory field and has a list of values to choose from. To access the

list click on the to open the search screen:

iProcurement Tutorial
How to Make Online Purchase Requisitions

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Supplier [▼] [   ] [Go]

Results

	Quick Select	Supplier	Site	D-U-N-S Num	Tax Reg Num	TIN	Contact	Phone
	No search conducted.							

In the search field you can enter a partial value of the supplier name with % before and/or after and the system will provide a listing of values that match your criteria. For example, if your supplier is Test Supplier, you can enter Test% into the field and then click on the [Go] button.
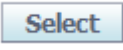
Search By Supplier [▼] [Test%] [Go]

Note all values containing "Test" at the beginning of the name will be shown:

Results

								Rows 1 to 27
	Quick Select	Supplier ▲	Site △	D-U-N-S Num △	Tax Reg Num △	TIN △	Contact	Phone
○	🗐	TEST	SCOTLAND					
○	🗐	TEST EQUIPMENT CONNECTION	LAKE MARY				COX, KERI	407 804-1780 X137
○	🗐	TEST PRODUCTS INTL LTD	MILTON					
○	🗐	TESTBOURNE LTD	HAMPSHIRE					
○	🗐	TESTEK INSTRUMENTS	H51786					
○	🗐	Test Supplier	P-CAD				Customer Servic	866 000-0000
○	🗐	Test Supplier	P-GBP				Customer Servic	866 000-0000
○	🗐	Test Supplier	P-USD				Customer Servic	866 000-0000
○	🗐	Test Veritas SRL	WIRE					
○	🗐	TestAmerica Laboratories Inc	DALLAS					
○	🗐	TestAmerica Laboratories Inc	IRVINE				Wilson, Bobby	1 949 261 1022

This will show you the Supplier, Site information as well as contact information. You can select by using the [Quick Select] or by clicking in the select

radio button [Select ⦿] and then [Select]. If there is more than one contact or site set up for the supplier, you will see the supplier listed several times with the information. The site you wish to use needs to have a "P-" in the front of the site name to ensure the purchase order will be routed to the supplier when created.

Search and Select: Supplier Name   Cancel   Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Supplier ▾   Test%   Go

Results

									Rows 1 to 27
Quick Select		Supplier ▲	Site △	D-U-N-S Num △	Tax Reg Num △	TIN △	Contact	Phone	
○	📇	TEST	SCOTLAND						
○	📇	TEST EQUIPMENT CONNECTION	LAKE MARY				COX, KERI	407 804-1780 X137	
○	📇	TEST PRODUCTS INTL LTD	MILTON						
○	📇	TESTBOURNE LTD	HAMPSHIRE						
○	📇	TESTEK INSTRUMENTS	H51786						
○	📇	Test Supplier	P-CAD				Customer Servic	866 000-0000	
○	📇	Test Supplier	P-GBP				Customer Servic	866 000-0000	
○	📇	Test Supplier	P-USD				Customer Servic	866 000-0000	
	📇	Test Vendor CDI	WIRE						

If you do not see the information you require, or there is no "P-"site available, please Note the supplier will need to be updated in the system before proceeding. Please see the iProcurement website (https://www.uoguelph.ca/finance/departments-services/procurement-and-payables/iprocurement-online-requisition-hvpo) for details on what required information is needed in your emailed request to purchasing.helpdesk@uoguelph.ca to have your supplier set up. In your email subject line please use *supplier setup*.

Note: The information will need to be set up in the system BEFORE proceeding further.

Once you select your supplier from the list the system will populate the Supplier fields:

To see the Site location information, you can click on the 🔍 beside the Site:

Search By Site ▾ P-CAD [Go]

Results

	Quick Select	Site ▲	Address	Contact	Phone
○	📋	P-CAD	address line 1 CAD P0S 0C0 CA	Customer Servic	866 000-0000

If you wish to see all the sites (or change the site) you can remove Search By information and click the [Go]. This will display all the sites for the supplier, with location and contact information.

Search By Site ∨ [   ] Go

Results

Quick Select		Site ▲	Address	Contact	Phone
○	📇	P-CAD	address line 1 CAD P0S 0C0 CA	Customer Servic	866 000-0000
○	📇	P-GBP	Address line 1 - GBP GBP P0S 0O0 GB	Customer Servic	866 000-0000
○	📇	P-USD	address Line 1 USA USA AK 000000 US	Customer Servic	866 000-0000

You can select/change your information by selecting the radio button or the Quick Select button.

2.3   Item Description:

* Item Description [   ]

Enter your item description, please include related information such as part number, make, model, etc.

2.4   Category:

* Category [   ] 🔍

This is a mandatory field and has a list of values to choose from. To access the list, click on the 🔍 to open the search screen. You can Search by Category or by Description. To search by description, initiate the dropdown list from the right arrow and select description.

Search By Category ▼ ⬅

Then you can enter a partial value to limit the list of return values:

Search By Category [▼] comp   [Go]

Results

	Quick Select	Category ▲	Description △
○	[icon]	COMP1.SUPP	Computer - Hardware, Accessories & Peripherals
○	[icon]	COMP2.MAIN	Computer - software apps & websites - Repair Services, Preventative Maintenance, Support
○	[icon]	COMP2.SUPP	Software applications both locally hosted or cloud (SaaS)

2.5   Quantity/Unit of Measure/Unit Price/Amount:

* Quantity [   ]   * Unit of Measure [   ] 🔍   * Unit Price [   ]

* Amount [   ]

Enter the applicable information in the displayed fields. Note the fields displayed will be determined by your item type (section 2.1).

2.6   Currency:

* Currency [CAD ▼]

The Currency defaulted here is CAD. Please verify and make sure your currency is what your quote is in.
Update if applicable to one of the following system choices: USD; EUR; GBP; CAD.
If your currency is not available in the system, please select CAD and make a note to the buyer advising what currency the payment will need to be in.

Add item(s) to Shopping Cart:

Once you have completed the fields you can add the item to your Shopping Cart by clicking on the [**Add to Cart**] button.

Non-Catalog Request

Clear All | Add to Cart | Add to Favorites

* Indicates required field

* Item Type	Goods.I can provide description, item price and quantity ▾	
	Please select "Goods or Services" unless your item(s) are quantity based with a locked in unit price and will be billed by quantity	
* Item Description	Computer server, product code 2345698	
* Category	COMP1.SUPP	
* Quantity	2	
* Unit of Measure	Each	
* Unit Price	50000	
* Currency	CAD ▾	

☐ New Supplier
Supplier Name   Test Supplier
Site   P-CAD
Contact Name   Customer Servic
Phone   866 000-0000
Email   purchase@uoguelph.ca

If you have more items to enter from the same supplier, start with the Item Type field again and add/update the fields as required to add a second (or more) items as needed. For example, we are going to add a Good or Services. Therefore, we will need to update some of the currently displayed fields. The supplier information will remain the same. Note one requisition should have only one supplier. If you change the Item Type the form will reset as the fields will change. Please make sure to update the information as required.

Once you add the second item (or others) to your cart, you will see the information on the right under Shopping Cart:

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

Computer server...	2	Each
Testing for new...	100,000.00	CAD

View Cart and Checkout

When you have all your items added to the cart for this supplier's purchases you can View Cart and Checkout [View Cart and Checkout].
This will move you to a screen to view your current items and add additional information:

Shopping Cart

* Requisition Description   Computer with new tax code HST-15% PRV/FED

* When do you need these items?   12-Feb-2020 00:00:00

* Where do they need to be delivered?   Bio Sci - Sci Complex

Additional Header Information

* Ship to Contact

* Contact Phone/Ext

Carrier Account No.

Freight / GL

* Bid/Quote Ref.
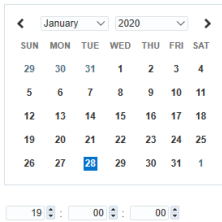
▶ Show Delivery and Billing

Line		Item Description	Unit	Quantity	Price	Amount (CAD)	Delete
1	☒	Computer with new tax code HST-	Currency 1	100000	1 CAD	100,000.00	🗑
2	☒	Computer server, product code	Each	2	50000 CAD	100,000.00	🗑
					Total	200,000.00	

Continue Shopping   Edit   Save   Submit

3.   Requisition Information

3.1   Requisition Description: should be updated to describe the purchase requirement and if the purchase is for a period of time, that time period should also be included in the field information.

3.2   When do you need these items? enter the date the goods/services are needed for, note that you can click on the icon 📅 to have a calendar display which you can choose the date from

3.3 **Where do they need to be delivered**: enter the location number code (format ####-#..) for where goods/services should be shipped.   If the number code is not known enter the four 0digit unit #, then press the tab key. From the drop down list choose the correct shipping address.

4.   Additional Header Information:

4.1   **Ship to Contact**: enter the contact person that will receive the goods/services

4.2   **Contact Phone/Ext**: enter the contact person phone and extension

4.3   **Carrier Account No.:** if you have the carrier account number that will be used please enter the information here, otherwise leave blank

4.4   **Freight/GL**: If you have the GL coding to be used for Freight charges please enter here, otherwise leave blank

4.5   **Bid/Quote Ref**.: enter the supplier quote number

5.   Delivery and Billing:

Click on the Show Delivery and Billing to open and populate the following fields:

5.1   **End User**: enter/choose from the list the person who is requesting the purchase. Please update this if you are not the person requesting the purchase.

5.2 **Suggested Buyer**: enter the buyer for the commodity you are purchasing. If you are unsure of whom to enter, please to go the iProcurement website and access the Commodity Codes by buyer list. (https://www.uoguelph.ca/finance/departments-services/procurement-and-payables/iprocurement-online-requisition) or (https://www.uoguelph.ca/finance/node/1353)

View your current items and make changes if required:

If you need to add further items, use the continue shopping button to take you back to the "shop" tab. See section 2.

6.   Edit and Submit Requisition

If your information is correct, click the edit button [Edit] to add the general ledger charge account information. You will notice that a requisition number is now shown at the top of the screen:

Edit and Submit Requisition 1026348

Refresh | Save | Printable Page | Submit

* Indicates required field

Total   200,000.00 CAD
* Description   Computer and server with new tax code HST-15% PRV/FED

Select Lines: Update | Copy | Delete |

	Details	Description	Quantity	Unit	Price	Amount (CAD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
☐	▶	Computer with new tax code HST-	100000	Currency 1	1 CAD	100,000.00	12-Feb-2020 00:00:00	Purchasing Services Q Enter one-time address	+	✎	🗑
☐	▶	Computer server, product code	2	Each	50000 CAD	100,000.00	12-Feb-2020 00:00:00	Purchasing Services Q Enter one-time address	+	✎	🗑
					Total	200,000.00					

Based on your approval authority, this requisition does not require approval by others.

Approvals

Manage Approvals

📄→ No Approvals Required

Notes And Attachments

Notes

Note To Buyer [   ]

Requisition Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Return to Shopping

From the above screen you will need to select the first line and click the update button to move to the area where GL coding can be entered:

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	Details	Description	Quantity	Unit	Price
☑	▶	Computer with new tax code HST-	100000	Currency 1	1 CAD
☐	▶	Computer server, product code	2	Each	50000 CAD

Select Lines: **Update** Copy Delete

6.1 General Ledger Account:

Billing

Line	UofG COA	Project	Task	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent	Quantity	Amount (CAD)	Delete
1	Fund.Unit.Grant.Project.Object.TBA						100	300	9,000.00	🗑
						Total	100	300	9,000.00	

✔ **TIP** Total allocation must equal 100% of the selected line values.

☐ Apply this Cost Allocation information to all applicable requisition lines

You can directly type in your GL code with periods between the segments. Note all segments must be completed.

1	100.002098.000000.000000.622 ×
	Fund.Unit.Grant.Project.Object.TBA

or there is a search list available, by clicking on the icon beside the field, it will open a search and select window.

Search

* Fund
* Unit
* Grant
* Project
* Object
* TBA

Search   Clear

You can enter the segments here or use the 🔍 to search on individual segments. If using this search function, you will need to click on the search button once you have entered some of the values and the Results will show code combinations for your to choose from:

Search

* Fund 100
General Operating

* Unit 002098
PURCHASING SERVICES-PURCHASING

* Grant

* Project

* Object

* TBA

Search   Clear

Results

Create

Code Combination
○ 100.002098.000000.000000.50914.000000000
○ 100.002098.000000.000000.50933.000000000
○ 100.002098.000000.000000.51404.000000000

Once the coding information has been enter you can allocate how much of the funds are committed to the coding. Click on the radio button to the left of the coding you wish to use and then the select button **Select** located at the top right of the window. The system will default is 100% of the line value to this coding.

Once the coding information has been enter you can allocate how much of the funds are committed to the coding. The default is 100%.

6.2   Multiple Charge Accounts:

If you need to split the charges you can update one of the fields to the right (percent, quantity, amount) and then add another row ![add row icon] for a different coding. You can apply the coding allocation to all applicable requisition lines by check off the box at the bottom left of the form.

Line	UofG COA	Project	Task	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent	Quantity	Amount (CAD)	Delete
1	100.002098.000000.000000.62552 Fund.Unit.Grant.Project.Object.TBA						50	150	4,500.00	🗑
2	8.000000.000000.62502.00000000 Fund.Unit.Grant.Project.Object.TBA						50	150	4,500.00	🗑
						Total	100	300	9,000.00	

☑ TIP Total allocation must equal 100% of the selected line values.

☐ Apply this Cost Allocation information to all applicable requisition lines

Once the information is entered click on **Apply**

NOTE: If you have multiple charge accounts against one line item all invoices for that line will be split this way. For example the above coding will result in every invoice being slit and paid 50% to each account for this line item 1. If you receive an invoice where you wish the full amount to be paid by only one of the GL codes you will need to do a separate line item on the requisition.

If you have several items and did not use the ☐ Apply this Cost Allocation information to all applicable requisition lines function, you will need to select and update those items with GL coding.

6.3   Attachments:

The final step is to add your attachments and notes. This is the backup information for your purchase, such as the quote, agreement, any proforma invoices, etc.

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

There are two areas for this. If you wish to give the buyer a quick note that remains only on the requisition you can use the Note to Buyer:

Before: After information entered:

Note To Buyer   Note To Buyer   As discussed over the phone, supplier is waiting for a purchase order to be able to process this order.

As discuss

Add Attachment…   Add Attachment...

To add an attachment click on the Add Attachment button. Change the attachment type if needed (choices include Text; File; Url <- do not use). If you change the type it will update the screen:

Add Attachment ×

Attachment Type	Short Text ▾
Title	
Description	
Category	To Buyer ▾
*Short Text	

Cancel Add Another Apply

Add Attachment ×

Attachment Type	File ▾
Title	
Description	
Category	To Buyer ▾
*File	Browse...

Cancel Add Another Apply

Short Text type: allows typing a note into the text box
Long Test type: allows typin a note into the text box
File type: allows additing files
Other Type: (not used at present)

Add a Title for you note (especially if you have several)
Choose the Category: To Buyer (please update from default if needed)

Add the text or file and Apply.   A confirmation window will appear:

Confirmation ×

Attachment ShortText has been added successfully but not committed; it would be committed when you commit the rest of the current transaction.

Ok

Notes And Attachments

Notes

Note To Buyer
```
As discussed over the phone, supplier is
waiting for a purchase order to be able to
process this order
```

Requisition Attachments

Add Attachment...

Title △	Type △	Description △	Category △	Last Updated By ▲	Last Updated △	Usage △	Update	Delete
Undefined	Short Text		To Buyer	NTERI	10-Feb-2020	One-Time	✏️	🗑️

6.4   Review and Submit:

Finally, you can review the requisition, print the page if you choose and Submit the requisition by clicking the applicable button:

Edit and Submit Requisition 1026348 [Refresh] [Save] [Printable Page] [Submit]

* Indicates required field

Total 200,000.00 CAD
* **Description** [Computer and server with new tax code HST-15% PRV/FED]

Select Lines: [Update] [Copy] [Delete] |

	Details	Description	Quantity	Unit	Price	Amount (CAD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
☐	▶	Computer with new tax code HST-	100000	Currency 1	1 CAD	100,000.00	12-Feb-2020 00:00:00	Purchasing Services 🔍 Enter one-time address	➕	🖊	🗑
☐	▶	Computer server, product code	2	Each	50000 CAD	100,000.00	12-Feb-2020 00:00:00	Purchasing Services 🔍 Enter one-time address	➕	🖊	🗑
					Total	200,000.00					

Based on your approval authority, this requisition does not require approval by others.

Approvals

[Manage Approvals]

📄➡ No Approvals Required

Notes And Attachments

Notes

Note To Buyer [As discussed over the phone, supplier is waiting for a purchase order to be able to process this order]

Requisition Attachments

[Add Attachment...]

Title △	Type △	Description △	Category △	Last Updated By ▲	Last Updated △	Usage △	Update	Delete	Publish to Catalog
Undefined	Short Text		To Buyer	NTERI	10-Feb-2020	One-Time	🖊	🗑	📇

Return to Shopping [Refresh] [Save] [Printable Page] [Submit]

Once you submit the requisition to the procurement system for processing, you will receive a confirmation:

Confirmation

Requisition 1026348 has been submitted.

To check on this requisition's status, click on the **Requisitions** tab or look in **My Requisitions** on the Shop page.

From your Requisitions tab you can see all requisitions you have processed and the status of them. If the requisition has an associated purchase order it will be shown under the Order field. You can click on the Order number to view details:

Shop | **Requisitions**

Requisitions | Notifications | Approvals

Requisitions

Search

Views

View [All My Requisitions ▾] [Go]

🔵 Indicates requisition with a pending change request.

Select requisition: [Copy To Cart] [Cancel Requisition] [Change] [Complete] [Delete] | 🔲 🔁 🗔 ⚙ ▾ 🎞   Rows 1 to 30

Select	Requisition	Description	Total	Quantity	Qty Delivered	Qty Cancelled	Open Quantity	Creation Date ▼	Status △	Order
○	1026348	Computer and server with new tax code HST-15% PRV/FED	200,000.00 CAD	2	0	0	0	10-Feb-2020 11:43:21	Approved	202001436 ⌃

Note if the Order number is NOT underlined it is in process. If the Order number is underlined you can click on it to see details.

Select	Requisition	Description	Total (CAD)	Creation Date ▼	Status	Order
◎	1016474	Apple fritter machine with training services	6,700.00	30-May-2016 15:36:55	Approved	201602476

Standard Purchase Order: 202001436, 0 (Total CAD 200,000.00)

Actions View Receipts [▼] Go Ok

Currency= CAD

Order Information

General

Total	200,000.00
Supplier	Test Supplier
Supplier Site	P-CAD
Supplier Contact	Customer Servic,
Address	address line 1
	CAD, P0S 0C0
Buyer	KUINDERSMA, LIS
Order Date	10-Feb-2020 14:11:43
Description	Computer and server with new tax code HST-15% PRV/FED Line 1 and TESTz tax line 2
Status	Approved
Note to Supplier	
Operating Unit	UofG Main Operating Unit
Supplier Order Number	

Terms and Conditions

Payment Terms	NET 30
Carrier	
FOB	FOB Destination
Freight Terms	See FOB Table below
Shipping Control	

Ship-To Address

Address	Purchasing Services
	University Centre - Level 5
	50 Stone Road East
	Guelph, N1G 2W1

Bill-To Address

Address	Accounts Payable
	University Centre - Level 5
	50 Stone Road East
	Guelph, N1G 2W1

Summary

Total	200,000.00
Received	0.00
Invoiced	0.00
Payment Status	Not Paid

PO Details

Show All Details | Hide All Details

Details	Line ▲	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
▶	1	Miscellaneous			Computer with new tax code HST-15% PRV/FED	Currency 1	100000	1	100,000.00	Open	🖉1	
▶	2	Goods			Computer server, product code 2345698 with TESTz tax	Each	2	50000	100,000.00	Open	🖉1	