

Reference Manual

How to enter a Requisition in Oracle iProcurement

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ORACLE®





*User Name

(example: michael.james.smith)

*Password

(example: 4u99v23)

Login Assistance

Accessibility

None

1. Log into the system:

Using the iProcurement user ID and password.

ORACLE® iProcurement

Shop

Requisitions

Stores

Shopping Lists

Non-Catalog Request

Search

Main Store

Go

Advanced Search

Stores

Main Store

Main Store

Exchange Oracle.com

My Requisitions

Full List

Requisition	Description	Total (CAD)	Status	Copy	Change
No results found.					

Shopping Cart

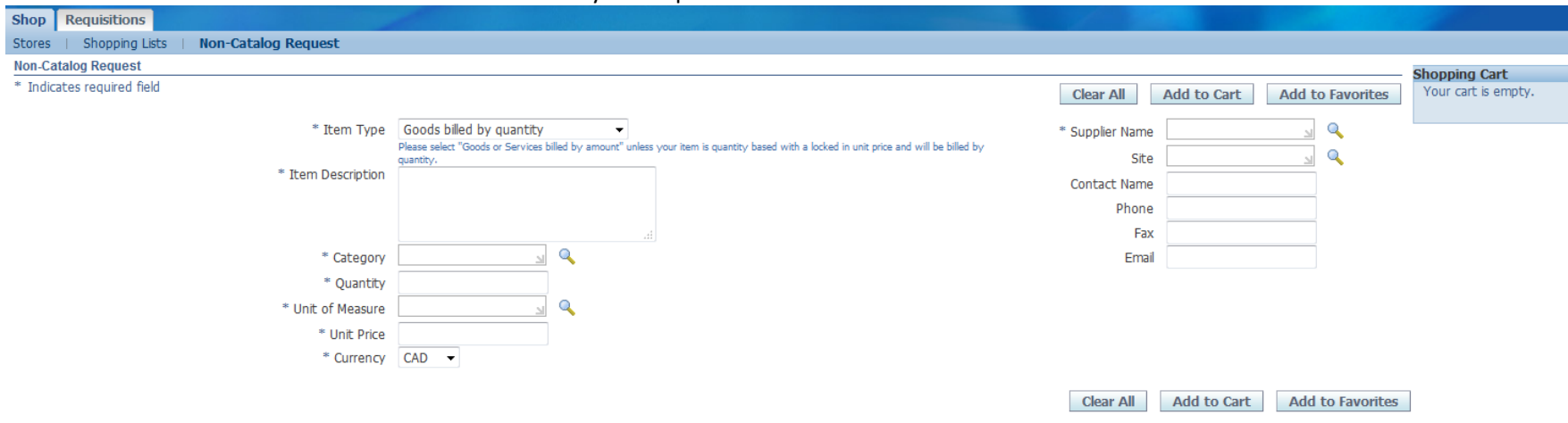
Your cart is empty.

This first screen after login is your home screen, it shows:

- a list of the requisitions you have initiated
- if you have any items in your shopping cart
- a header section at the top

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.

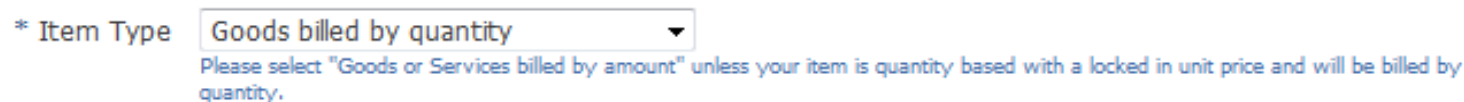


The screenshot shows the 'Non-Catalog Request' form in the iProcurement system. The header includes 'Shop Requisitions' and 'Non-Catalog Request' tabs. A note states '* Indicates required field'. The form contains several mandatory fields marked with an asterisk: Item Type (dropdown menu), Item Description (text area), Category (dropdown menu), Quantity (text input), Unit of Measure (dropdown menu), Unit Price (text input), and Currency (dropdown menu). A supplier information section on the right includes fields for Supplier Name, Site, Contact Name, Phone, Fax, and Email. At the bottom right, there are buttons for 'Clear All', 'Add to Cart', and 'Add to Favorites'. A 'Shopping Cart' box on the far right indicates 'Your cart is empty.'.

* 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:



This close-up shows the '* Item Type' dropdown menu. The selected option is 'Goods billed by quantity'. Below the dropdown, a blue text hint reads: 'Please select "Goods or Services billed by amount" unless your item is quantity based with a locked in unit price and will be billed by quantity.'

There are three choices for this field:

- Goods billed by quantity -> Goods being billed by quantity shipped i.e. Quantity 5 electric drills at \$800 each.
- Goods or services billed as an amount -> \$6000 amount billed over several invoices
- Service billed by quantity -> Services billed by quantity, i.e. Quantity 600 hours at \$100/hour

The system default is "Goods billed by quantity". Please update this field as **your first action** if your purchase is something other than the default as the screen will update. For example, a purchase requirement for \$6000 worth of professional services and that will be receiving multiple invoices, select the Goods or services billed as an amount as the Item Type.

The screens for the different Item Types:

Goods billed by quantity:	Goods or services billed as an amount:	Services billed by quantity:
<div> <div>* Item Type</div> <div> <div>Goods billed by quantity</div> <div>Please select "Goods or Services billed by amount" un quantity.</div> </div> </div> <div> <div>* Item Description</div> <div></div> </div> <div> <div>* Category</div> <div></div> <div></div> </div> <div> <div>* Quantity</div> <div></div> </div> <div> <div>* Unit of Measure</div> <div></div> <div></div> </div> <div> <div>* Unit Price</div> <div></div> </div> <div> <div>* Currency</div> <div>CAD</div> </div>	<div> <div>* Item Type</div> <div> <div>Goods or services billed by amount</div> <div>Please select "Goods or Services billed by amount" un quantity.</div> </div> </div> <div> <div>* Item Description</div> <div></div> </div> <div> <div>* Category</div> <div></div> <div></div> </div> <div> <div>* Amount</div> <div></div> </div> <div> <div>* Currency</div> <div>CAD</div> </div>	<div> <div>* Item Type</div> <div> <div>Services billed by quantity</div> <div>Please select "Goods or Services billed by amount" un quantity.</div> </div> </div> <div> <div>* Item Description</div> <div></div> </div> <div> <div>* Category</div> <div></div> <div></div> </div> <div> <div>* Quantity</div> <div></div> </div> <div> <div>* Unit of Measure</div> <div></div> <div></div> </div> <div> <div>* Rate per Unit</div> <div></div> </div> <div> <div>* Currency</div> <div>CAD</div> </div>


Note: if you use **Goods billed by quantity**, invoice amounts must match your quantity and pricing exactly or there will be issues with invoice payment processing.

For example:

- If your order item type is “Goods billed by quantity”, the Quantity is 1, price \$6000, the first invoice comes in at quantity 1, amount \$2,553.25. Payment services will not be able to match as there will be a price variance.
- If your order item type is “Goods or Services billed as an amount”, the Amount is 6000, the first invoice comes in at \$2,553.25. Payment services can match the invoice 2,553.25 to the Amount 6000 leaving the correct amount of 3446.75 available for future invoicing.

2.2 Supplier Name:

* 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:

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

Results

Select	Quick Select	Supplier	Site	Contact	Phone
		No search conducted.			


In the search field you can enter a partial value of the supplier name with % before and after and the system will provide a listing of values that match your criteria. For example if your supplier is Test Equipment 1 on Zero Street, you can enter %Test% into the field and then click on the button.

Search By Supplier

Note all values containing "Test" in the name will be shown:

Results

1-10

Select	Quick Select	Supplier	Site	Contact	Phone
<input type="radio"/>		AAVLD-BACTEST C/O DR C MADDOX	UNIVERSITY		
<input type="radio"/>		ALPHATEST CORP	MESA		
<input type="radio"/>		APPLICANT TESTING SERV INC	540 CLARKE RD		
<input type="radio"/>		APPLICANT TESTING SERV INC	LONDON		
<input type="radio"/>		Accounts Payable Over forty characters ImageNow Test	GUELPH		
<input type="radio"/>		Advanced Agricultural Testing Inc	P-BADEN	Desk, Order	1-519 748-7745
<input type="radio"/>		Advanced Agricultural Testing Inc	PETERSBURG	BECHTEL, BOB	
<input type="radio"/>		American Environmental Testing Laboratory Inc	P-BURBANK	Razmara, Cyrus	1-818 845-8200
<input type="radio"/>		AquaTox Testing & Consulting Inc	GUELPH		
<input type="radio"/>		Ashton Testing Services	VANCOUVER		

1-10

If you do not see the correct supplier or site, click on the "Next 10" to see more sites for this supplier. Or you can narrow your search parameter by only using the % (wild card character) at the end of the value:

Search By

Search By

Results

Select	Quick Select	Supplier	Site	Contact	Phone
<input type="radio"/>		TEST EQUIPMENT CONNECTION	LAKE MARY	COX, KERI	407 804-1780 X137
<input type="radio"/>		TEST PRODUCTS INTL LTD	MILTON		
<input type="radio"/>		TESTBOURNE LTD	HAMPSHIRE		
<input type="radio"/>		TESTEQUITY INC	S17511-THO ND O		
<input type="radio"/>		Test Equipment 1	P-GULEPH1	Contact, First	519 123-4567
<input type="radio"/>		Test Equipment 1	P-GULEPH1	Contact, Second	519 123-4567
<input type="radio"/>		Test Equipment 1	P-SITE2	site2, Contact	519 234-5678
<input type="radio"/>		Test Equipment 3	GUELPH		
<input type="radio"/>		Test Supplier	P-CAD Site	Contact, Test	
<input type="radio"/>		Test Supplier	P-USD Site	Contact, test	

Previous 1-10 Next 10

Previous 1-10 Next 10

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

radio button and then . If there is more than one contact or site set up for the supplier, you will see the supplier listed several time 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.

If you do not see the information you require, or there is no "P-" site available, please email purchasing.helpdesk@uoguelph.ca with the required information 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:

* Supplier Name

Test Equipment 1

Site

P-SITE2

Contact Name

site2, Contact


Phone

519 234-5678

Fax

Email

site2contact@123.com

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


Search By


Site

P-SITE2

Go

Results

Select	Quick Select	Site	Address	Contact	Phone
<input type="radio"/>		P-SITE2	Zero Street SITE Site2 P0S 1C2 CA	site2, Contact	519 234-5678




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

Search By



Site

Go

Results

Select	Quick Select	Site	Address	Contact	Phone
<input type="radio"/>		P-GUELPH1	U of G Test Guelph N1G 2W1 CA	Contact, First	519 123-4567
<input type="radio"/>		P-GUELPH1	U of G Test Guelph N1G 2W1 CA	Contact, Second	519- 123-4567
<input type="radio"/>		P-SITE2	Zero Street SITE Site2 P0S 1C2 CA	site2, Contact	519 234-5678

You can select/change your information.

* Supplier Name	Test Equipment 1	
Site	P-GUELPH1	
Contact Name	Contact, Second	
Phone	519- 123-4567	
Fax	519- 987-6543	
Email	secondcontact@123.cor	

2.3 Item Description:


* Item Description

Enter your item description, please include what the item is including 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 with a % to limit the list of return values:

Search By

Results			
Select	Quick Select	Category ▲	Description
		TRAINING.SUPP	Training, Course, Seminar

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

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 button.

* Item Type: Goods or services billed by amount
Please select "Goods or Services billed by amount" unless your item is quantity based with a locked in unit price and will be billed by quantity.

* Item Description: Training on operation of new apple fritter machine as per quotation 77777

* Category: TRAINING.SUPP

* Amount: 1000

* Currency: CAD

Clear All Add to Cart Add to Favorites

* Supplier Name: Test Equipment 1

Site: P-SITE2

Contact Name: site2, Contact

Phone: 519 234-5678

Fax: 519 231-8765

Email: site2@testequip.ca

Clear All Add to Cart Add to Favorites

Your Shopping Cart will now show an item:

Shopping Cart
Your cart contains 1 line.

Recently Added Lines
Training on ope... 1,000.00 CAD

[View Cart and Checkout](#)

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 billed by Quantity. Therefore we will need to update some of the currently displayed fields:

Clear All Add to Cart Add to Favorites

* Item Type: Goods or services billed by amount
Please select "Goods or Services billed by amount" unless your item is quantity based with a locked in unit price and will be billed by quantity.

* Item Description: Training on operation of new apple fritter machine as per quotation 77777

* Category: TRAINING.SUPP

* Amount: 1000

* Currency: CAD

* Supplier Name: Test Equipment 1

Site: P-SITE2

Contact Name: site2, Contact

Phone: 519 234-5678

Fax: 519 231-8765

Email: site2@testequip.ca

Clear All Add to Cart Add to Favorites

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.

* Item Type

Goods billed by quantity

Please select "Goods or Services billed by amount" unless your item is quantity based with a locked in unit price and will be billed by quantity.

* Item Description

Specialty Apple Fritter Machine as per quotation 77777

* Category

FOOD.EQUIP

* Quantity

1

* Unit of Measure

Each

* Unit Price

5700

* Currency

CAD

* Supplier Name

Test Equipment 1

Site

P-SITE2

Contact Name

site2, Contact

Phone

519 234-5678

Fax

Email

site2contact@123.com

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

Specialty Apple...

1

Each

Training on ope...

1,000.00

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. This will move you to a screen to view your current items and you can make changes if required:

View Cart and Checkout

Shopping Cart

Save

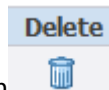
Checkout

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (CAD)	Delete
1	Specialty Apple Fritter Machine as per quotation 77777		Each	1	700 CAD	700.00	
2	Training on operation of new apple fritter machine as per quotation 77777		Currency 1	1000	1 CAD	1,000.00	
Total						1,700.00	

Return to Shopping

Save

Checkout



Such as delete an item from the current requisition

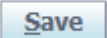
; Change Amount or Quantity being purchased; return to shopping

to add more items; save the requisition to complete at a later time

Save

or proceed to checkout

Checkout

If you save  at this point, the system will display as follows:

Shop
Requisitions

Save as Incomplete Requisition

* Indicates required field

* Requisition Description

Training on operation of new apple fritter machine as per quotation

Cancel

Save

Cancel


Save

Please note that the **Requisition Description field:** ^{* Requisition Description} should be updated to describe the purchase requirement as the system defaults in the first item line description. If the purchase is for a period of time, that time period should also be included in the field information.

* Requisition Description

After updating the description click on the save button, this will save the change and you will receive a confirmation:

Shop
Requisitions

 Confirmation
Requisition 1016474 has been saved.

You can continue to checkout, or create a new shopping cart. Creating a new cart will store current requisition. Any manually added approver will be moved to the end of the default approval chain. Incomplete requisitions can be accessed from requisitions page and completed later.

New Cart

Continue with Checkout

As per the displayed message, you can leave this requisition to complete later, start a new requisition or continue to the checkout.

Continue with checkout:

Shop

Requisitions

Requisition Information

Approvals

Review And Submit

Checkout: Requisition Information

* Indicates required field

* Requisition Description

Apple fritter machine with training services

* Ship to Contact

* Contact Phone/Ext

Carrier Account No.

Freight / GL

* Bid/Quote Ref.

Delivery

☐ Urgent

14-Jul-2016 00:00:00

* Need-By Date

example: 27-Jun-2016 19:45:00

* End User

Procurement User, Test

Person info is requesting the purchase

* Ship-To (####)

0020-1

Enter the four digit unit #, then press the tab key. From the drop down list choose the correct shipping address.

* Suggested Buyer

Billing

Cancel

Save

Submit

Edit Lines

Step 1 of 3

Next

Cancel

Save

Submit

Edit Lines

Step 1 of 3

Next

The upper portion of this form is the header section of the requisition. The lower half of this screen will contain the information that will default into the items of the requisition.

3. Requisition Information

Before:

* Requisition Description

Apple fritter machine with training services

* Ship to Contact

* Contact Phone/Ext

Carrier Account No.

Freight / GL

* Bid/Quote Ref.

After information entered:

* Requisition Description

Apple fritter machine with training services

* Ship to Contact

Lynne Harbin

* Contact Phone/Ext

519-824-4120 x58482

Carrier Account No.

Freight / GL

* Bid/Quote Ref.

77777


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 Ship to Contact:** enter the contact person that will receive the goods/services
- 3.3 Contact Phone/Ext:** enter the contact person phone and extension
- 3.4 Carrier Account No.:** if you have the carrier account number that will be used please enter the information here, otherwise leave blank
- 3.5 Freight/GL:** If you have the GL coding to be used for Freight charges please enter here, otherwise leave blank
- 3.6 Bid/Quote Ref.:** enter the supplier quote number


Requisition item defaults:


Before:

☐ Urgent

* Need-By Date 14-Jul-2016 00:00:00 
(example: 27-Jun-2016 19:45:00)


* End User iProcurement User, Test 
Person who is requesting the purchase


* Ship-To (####%) 0020-1 
Enter the four digit unit #, then press the tab key. From address.


* Suggested Buyer 


After information entered:


☐ Urgent


* Need-By Date 13-Aug-2016 00:00:00 
(example: 27-Jul-2016 19:45:00)

* End User KUINDERSMA, LIS 
Person who is requesting the purchase

* Ship-To (####%) 0020-1 
Enter the four digit unit #, then press the tab key. From address.

* Suggested Buyer RAKANOVIC, RAJNA 

- 3.7 Need-By Date:** 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

July 2016 

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Cancel

3.8 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.

3.9 Ship-To (####%): enter the location number code for where goods/services should be shipped. If the number code is not known enter the four digit unit #, then press the tab key. From the drop down list choose the correct shipping address.

3.10 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>)

Cancel Save Submit Edit Lines Step 1 of 3 Next

Once the information is completed you can use the Next button to move forward. An Error message will be displayed cautioning you that the charge account information is invalid. Click on the Enter Charge Account link to correct this:

Error

- Row 1 Charge Account - Charge account is invalid. (Program error: An error has occurred while looking up a flexfield segment combination. Please inform your support representative that: The FND_FLEX_SERVER validation function has encountered a null or negative combination ID () while trying to look up the segment values for this combination. This may indicate an invalid entry in the unique ID column of the combinations table.).
- Row 2 Charge Account - Charge account is invalid. (Program error: An error has occurred while looking up a flexfield segment combination. Please inform your support representative that: The FND_FLEX_SERVER validation function has encountered a null or negative combination ID () while trying to look up the segment values for this combination. This may indicate an invalid entry in the unique ID column of the combinations table.).



Requisition Information: Edit Lines

* Indicates required field

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select All Select None

Select Line	Description	Charge Account	Split
<input type="checkbox"/> 1	Specialty Apple Fritter Machine as per quotation 77777	Enter Charge Account	
<input type="checkbox"/> 2	Training on operation of new apple fritter machine as per quotation 77777	Enter Charge Account	

TIP Click on a Split icon to allocate costs to multiple accounts.

3.11 General Ledger Account:

From the following screen you will be able to enter the general ledger coding:

Requisition Information: Split Cost Allocation Approvals Review And Submit



* Indicates required field

Apply

Selected Line


Line	Description	Unit	Quantity	Price	Amount (CAD)
1	Specialty Apple Fritter Machine as per quotation 77777	Each	1	700 CAD	700.00


Projects Charge Accounts


Line	UofG COA	Percent	Quantity	Amount (CAD)	Delete
1	<input type="text" value="UofG COA"/> 	<input type="text" value="100"/>	<input type="text" value="1"/>	<input type="text" value="700.00"/>	
Fund, Unit, Grant, Project, Object, TBA					
Add Another Row		Total	100	1	700.00


There is a 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.

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

Selected Line					
Line	Description	Unit	Quantity	Price	Amount (CAD)
2	Specialty Apple Fritter Machine as per quotation 77777	Each	1	5700 CAD	5,700.00

Projects Charge Accounts					
Line	UofG COA	Percent	Quantity	Amount (CAD)	Delete
1	100.002098.000000.000000.62255 	100	1	5,700.00	
Fund,Unit,Grant,Project,Object,TBA					
Add Another Row		Total	100	1	5,700.00

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

☐ Apply this Cost Allocation information to all applicable requisition lines





3.11.1 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 for a different coding. Also you can apply the coding allocation to all applicable requisition lines by check off the box at the bottom left of the form. Once the

information is enter click on

Apply

Selected Line					
Line	Description	Unit	Quantity	Price	Amount (CAD)
2	Training on operation of new apple fritter machine as per quotation 77777	Currency 1	1000	1 CAD	1,000.00

Projects Charge Accounts					
Line	UofG COA	Percent	Quantity	Amount (CAD)	Delete
1	100.002098.000000.000000.62505 	50	500	500.00	
Fund,Unit,Grant,Project,Object,TBA					
2	100.002098.000000.000000.62255 	50	500	500.00	
Fund,Unit,Grant,Project,Object,TBA					
Add Another Row		Total	100	1000	1,000.00

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

☒ Apply this Cost Allocation information to all applicable requisition lines

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.

Therefore in the above example:

- Line item 1 invoices for the Training will be split 50/50 between the accounts 100.002098.000000.000000.62255 and 100.002098.000000.000000.62502
- Line item 2 invoices for the apple fritter machine will be applied fully to the one account 100.002098.000000.000000.62255

3.12 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.

Checkout: Approvals and Notes
Based on your approval authority, this requisition does not require approval by others.

Save Submit Back Step 2 of 3 Next

Approvals

Manage Approvals

No Approvals Required

Notes

Justification

Note To Buyer

Attachments

Add Attachment...

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

Save Submit Back Step 2 of 3 Next

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:

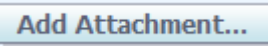
Before:

Note To Buyer

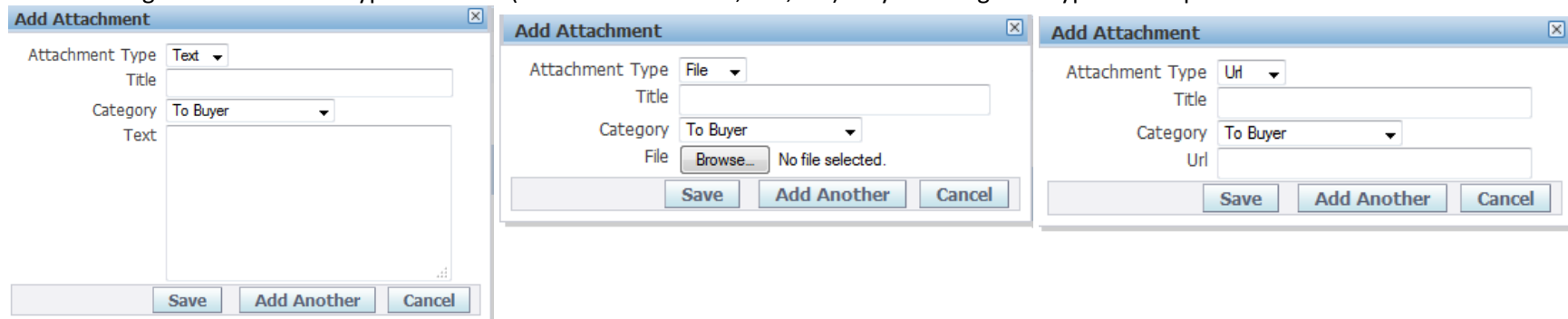
After information entered:

Note To Buyer

Raina as discussed over the phone - training is tentative scheduled for Sept 14th. Please let me know if there is an issue with sending the PO out by end of August. Thanks

Add Attachment... 

To add a quick attachment that will transfer over to the purchase order you can hover over the Add Attachment button or click it to allow adding notes. Change the attachment type if needed (choices include Text; File; Url). If you change the type it will update the screen:



The image shows three sequential screenshots of the 'Add Attachment' dialog box. Each window has a title bar with a close button (X). The first window shows 'Attachment Type' set to 'Text', with a 'Title' text field, a 'Category' dropdown menu set to 'To Buyer', and a large 'Text' text area. The second window shows 'Attachment Type' set to 'File', with a 'Title' text field, a 'Category' dropdown menu set to 'To Buyer', and a 'File' section with a 'Browse...' button and the text 'No file selected.'. The third window shows 'Attachment Type' set to 'Url', with a 'Title' text field, a 'Category' dropdown menu set to 'To Buyer', and a 'Url' text field. All three windows have 'Save', 'Add Another', and 'Cancel' buttons at the bottom.

Text type: allows typing a note into the text box

File type: allows adding files

Url Type: allow adding a Url address (this is not used at present)

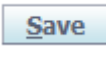
Add a Title for you note (especially if you have several)

Choose the Category: To Buyer (default)

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

Confirmation

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

After adding your attachments make sure you save .

Notes

Justification

Note To Buyer

Rajna as discussed over the phone - training is tentative scheduled for Sept 14th. Please let me know if there is an issue with sending the PO out by end of August. Thanks

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Quote 77777	File		To Buyer	IPROCURE1	11-Aug-2016	One-Time			
Training	Short Text		To Buyer	IPROCURE1	11-Aug-2016	One-Time			

Save

Submit

Back

Step 2 of 3

Next

4. Review and Submit:

Proceed to the Review and Submit screen by clicking the Next button:

Checkout: Review and Submit Requisition

Save

Printable Page

Back

Step 3 of 3

Submit

Requisition 1016474: Total 6,700.00 CAD

Created By

iProcurement User, Test

Creation Date

30-May-2016 15:36:55

Description

Apple fritter machine with training services

Justification

Requisition Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Quote 77777	File		To Buyer	IPROCURE1	11-Aug-2016	One-Time			
Training	Short Text		To Buyer	IPROCURE1	11-Aug-2016	One-Time			

Lines

Details	Line	Description	Cost Center	Unit	Quantity	Price	Amount (CAD)	Attachments
	1	Training on operation of new apple fritter machine as per quotation 77777	002098	Currency 1	1000	1 CAD	1,000.00	
	2	Specialty Apple Fritter Machine as per quotation 77777	002098	Each	1	5700 CAD	5,700.00	
Total							6,700.00	

Save

Printable Page

Back

Step 3 of 3

Submit

From here you can submit the requisition to the procurement system for processing. You will receive a confirmation:

Confirmation

Requisition 1016474 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:

View

All My Requisitions

Go

Indicates requisition with a pending change request.

Select requisition:

Copy To Cart

Cancel Requisition

Change

Complete

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

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

Select	Requisition	Description	Total (CAD)	Creation Date	Status	Order
<input type="radio"/>	1016474	Apple fritter machine with training services	6,700.00	30-May-2016 15:36:55	Approved	201602476

Standard Purchase Order: 201602476, 0 (Total CAD 6,700.00)
Currency=CAD

Actions View Receipts Go Ok

Order Information

General

Total **6,700.00**
Supplier **Test Equipment 1**
Supplier Site **P-SITE2**
Address **Zero Street SITE**
Site2, POS 1C2
Buyer **KUINDERSMA, LIS**
Order Date **11-Aug-2016 12:15:22**
Description
Status **Approved**
Note to Supplier
Operating Unit **UofG Main Operating Unit**
Supplier Order Number
Attachments **None**

Terms and Conditions

Payment Terms **IMMEDIATE**
Carrier
FOB **FOB Destination**
Freight Terms **See FOB Table below**
Shipping Control

Ship-To Address

Address **Finance - Purchasing Services**
Financial Services , UC#158:15
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	6,700.00
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
Show	1	Goods			Specialty Apple Fritter Machine as per quotation 77777	Each	1	5700	5,700.00	Open	UofG	
Show	2	Miscellaneous			Training on operation of new apple fritter machine as per quotation 77777	Currency 1	1000	1	1,000.00	Open	UofG	