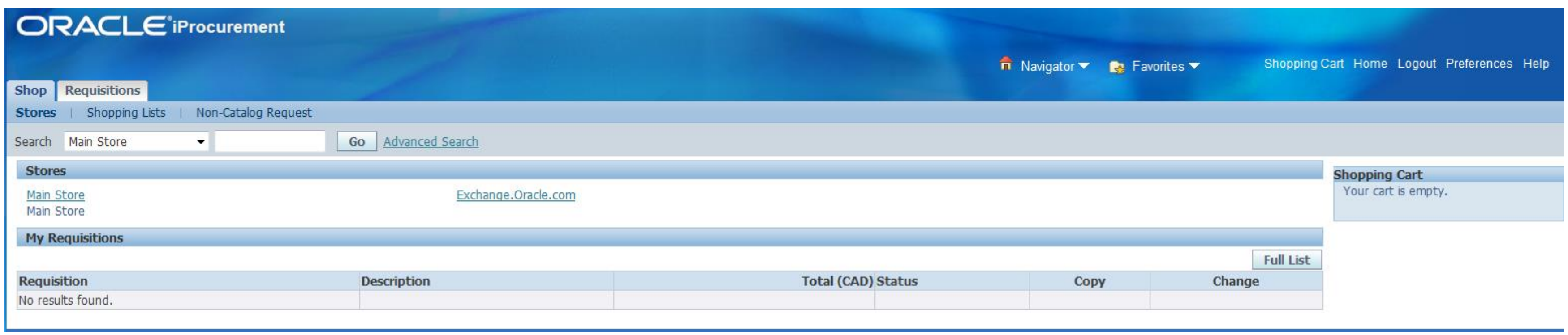
Reference Manual

How to enter a Requisition in Oracle iProcurement

Contents

1. Log into the system:

Using the iProcurement user ID and password.

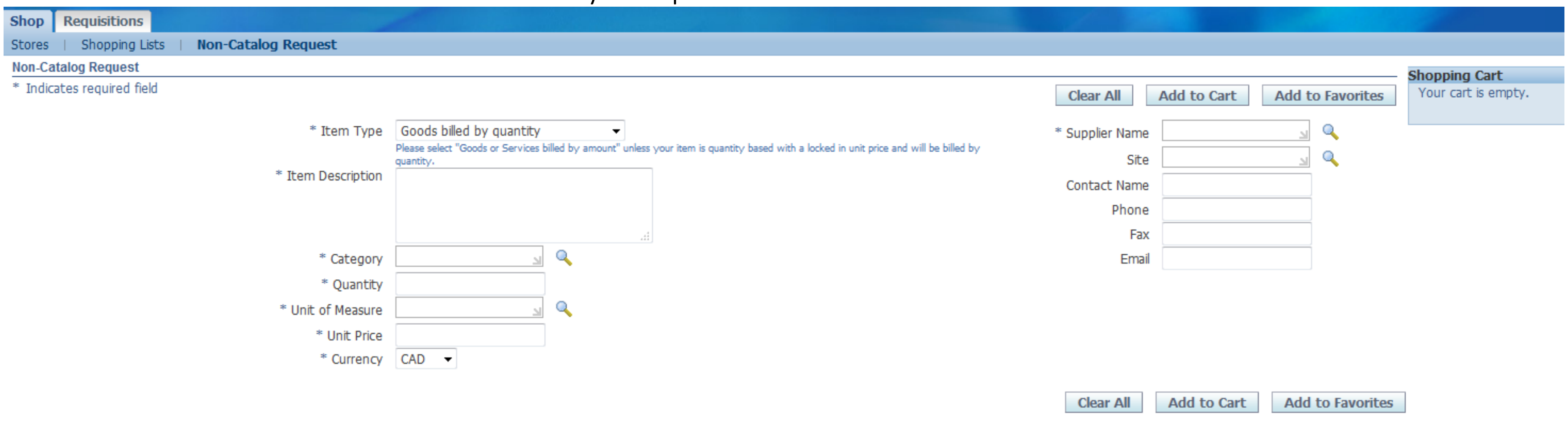


This first screen after login is your home screen, it shows:

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

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.



* 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.

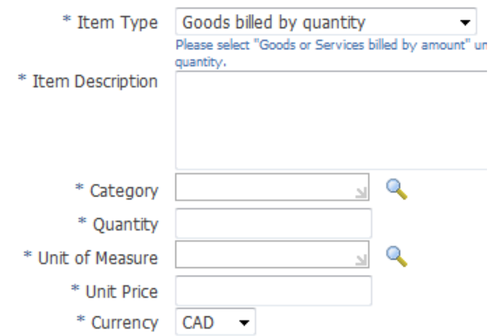
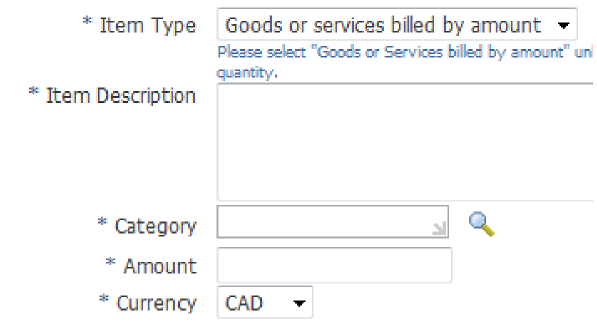
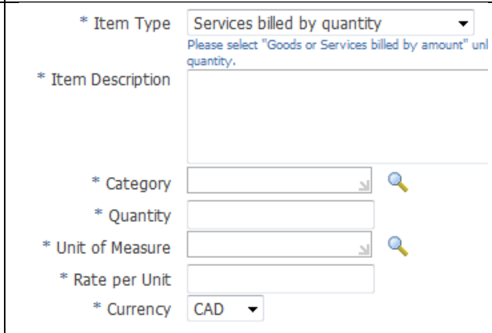
2.1 Item Type:

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:
		

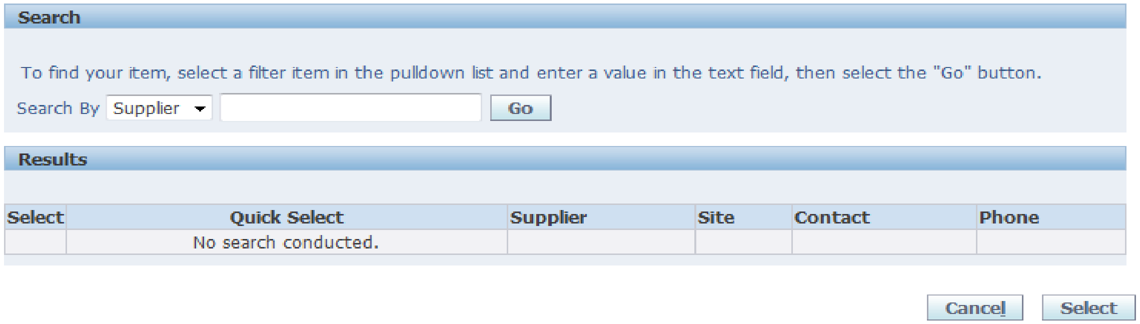
Note: if you use **Goods billed by quantity**, invoice amounts must match your quantity and pricing exactly or there will be issues with invoice payment processing.

For example:

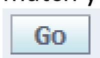
- If your order item type is "Goods billed by quantity", the Quantity is 1, price $6000, the first invoice comes in at quantity 1, amount $2,553.25. Payment services will not be able to match as there will be a price variance.
- If your order item type is "Goods or Services billed as an amount", the 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:

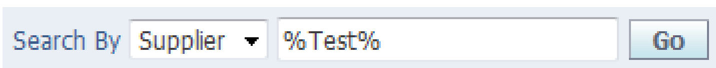
The next field which should be entered is the Supplier information. This is a mandatory field and has a list of values to choose from. To access the list click on the to open the search screen:



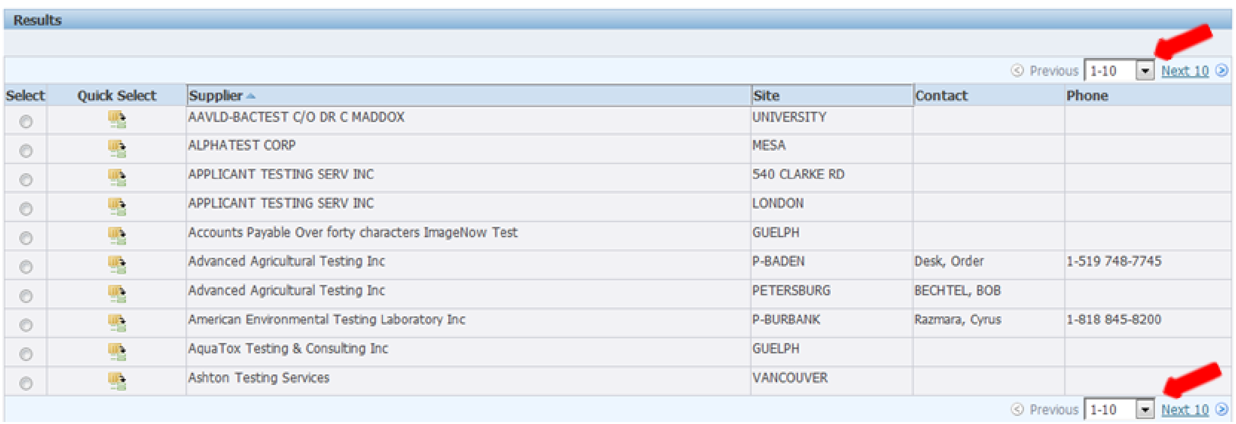
In the search field you can enter a partial value of the supplier name with % before and after and the system will provide a listing of values that match your criteria. For example if your supplier is Test Equipment 1 on Zero Street, you can enter %Test% into the field and then click on the



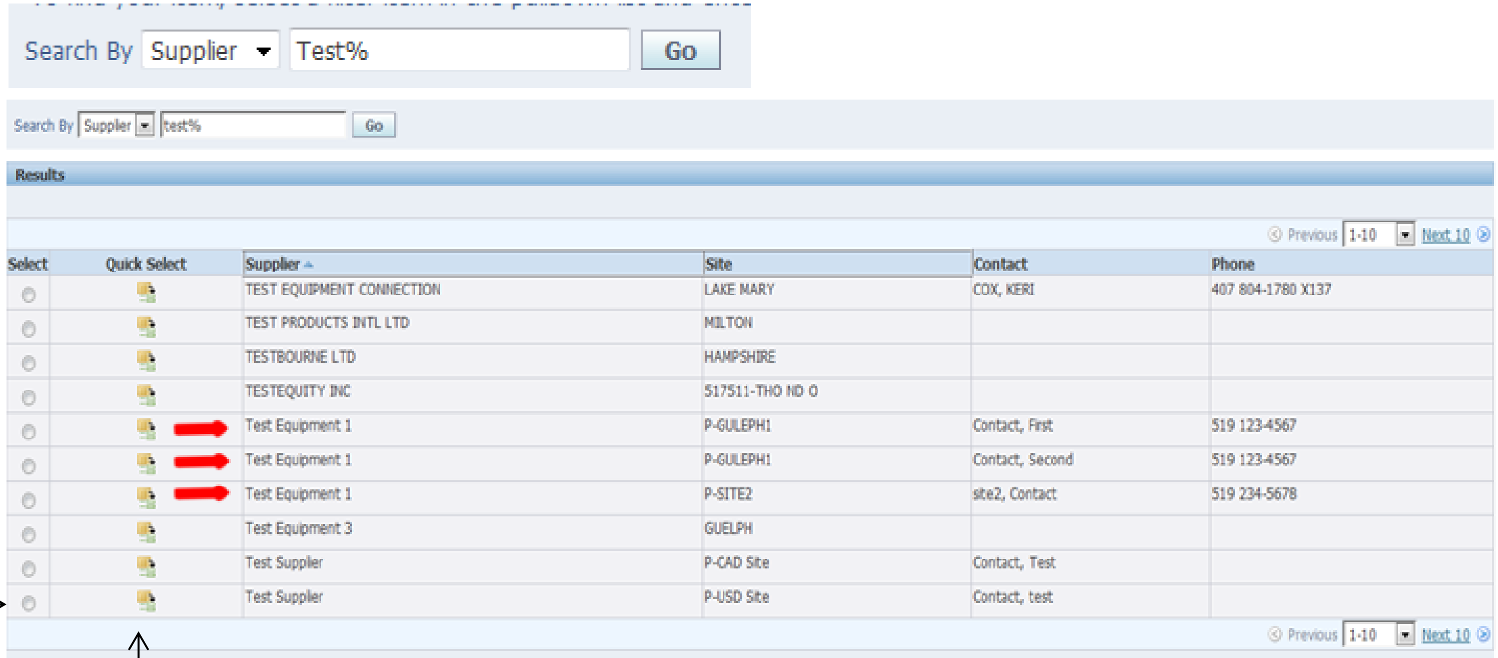
button.



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



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:



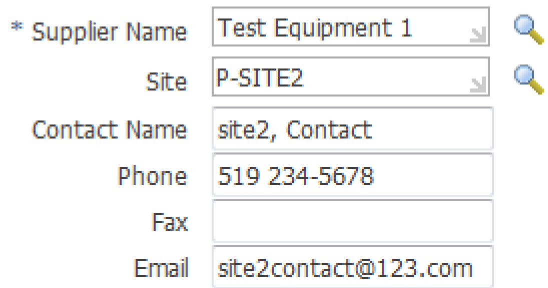
Select	Quick Select	Supplier	Site	Contact	Phone
		TEST EQUIPMENT CONNECTION	LAKE MARY	COX, KERI	407 804-1780 X137
		TEST PRODUCTS INTL LTD	MILTON		
		TESTBOURNE LTD	HAMPSHIRE		
		TESTEQUITY INC	517511-THO ND O		
		Test Equipment 1	P-GULEPH1	Contact, First	519 123-4567
		Test Equipment 1	P-GULEPH1	Contact, Second	519 123-4567
		Test Equipment 1	P-SITE2	site2, Contact	519 234-5678
		Test Equipment 3	GUELPH		
		Test Supplier	P-CAD Site	Contact, Test	
		Test Supplier	P-USD Site	Contact, test	

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 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.

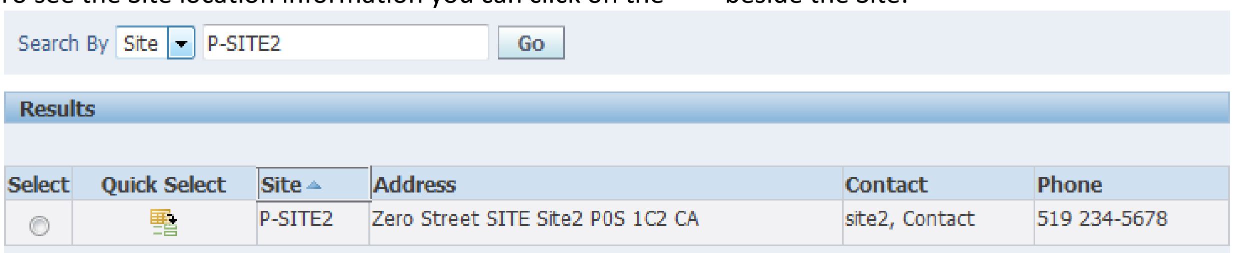
If you do not see the information you require, or there is no "P-"site available, please email purchasing.helpdesk@uoguelph.ca with the required information to have your supplier set up. In your email subject line please use *supplier setup*.

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

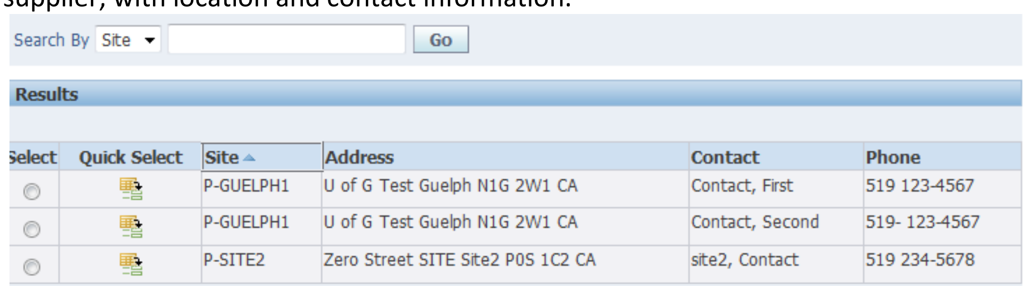
Once you select your supplier from the list the system will populate the Supplier fields:



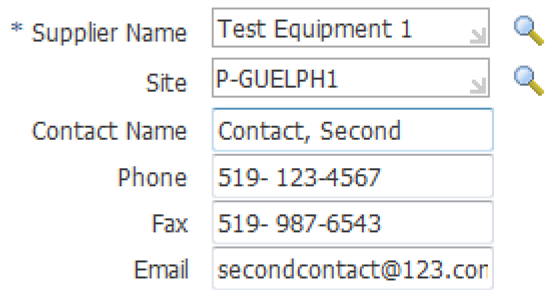
To see the Site location information you can click on the beside the Site:



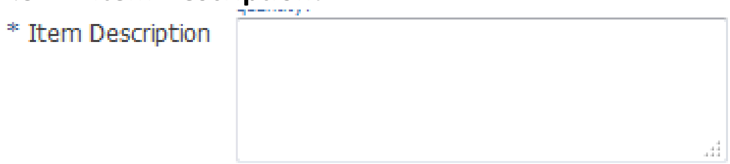
If you wish to see all the sites (or change the site) you can remove Search By information and click the Go. This will display all the sites for the supplier, with location and contact information.



You can select/change your information.

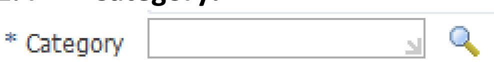


2.3 Item Description:

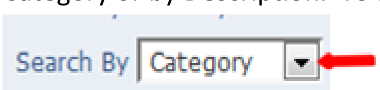


Enter your item description, please include what the item is including related information such as part number, make, model, etc.

2.4 Category:



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.



Then you can enter a partial value with a % to limit the list of return values: Search By Description Train% Go

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).

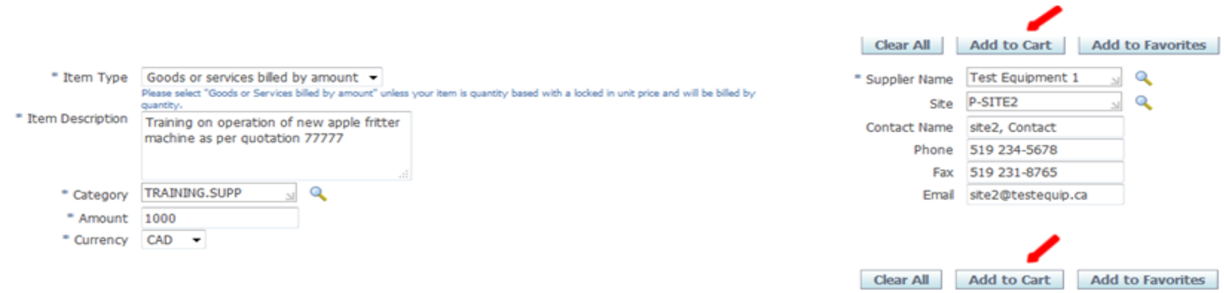
2.6 Currency:

* Currency CAD

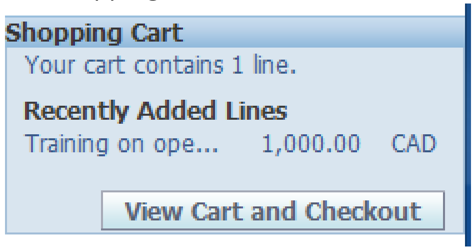
The Currency defaulted here is CAD. Please verify and make sure your currency is what your quote is in.
Update if applicable to one of the following system choices: USD; EUR; GBP; CAD.
If your currency is not available in the system, please select CAD and make a note to the buyer advising what currency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

Add item(s) to Shopping Cart:

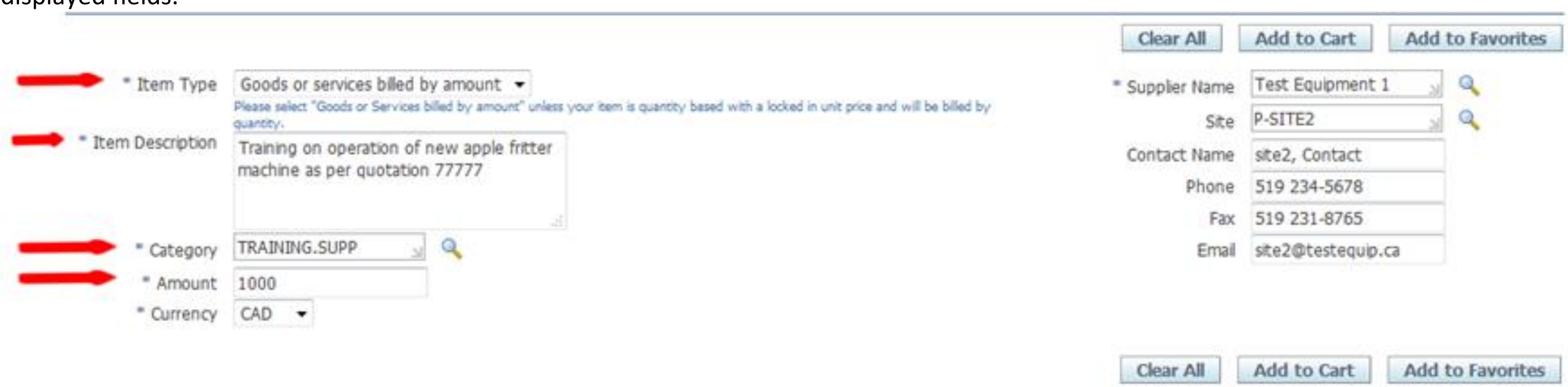
Once you have completed the fields you can add the item to your Shopping Cart by clicking on the Add to Cart button.



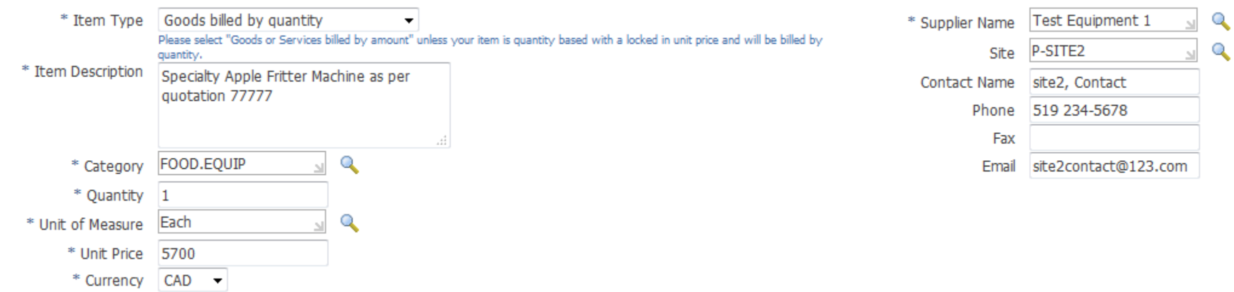
Your Shopping Cart will now show an item:



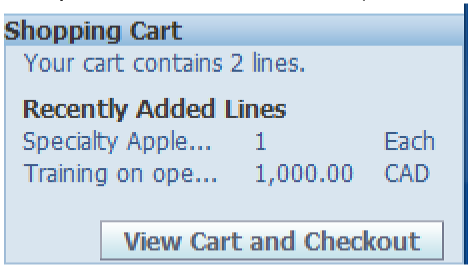
If you have more items to enter from the same supplier, start with the Item Type field again and add/update the fields as required to add a second (or more) items as needed. For example we are going to add a Good billed by Quantity. Therefore we will need to update some of the currently displayed fields:



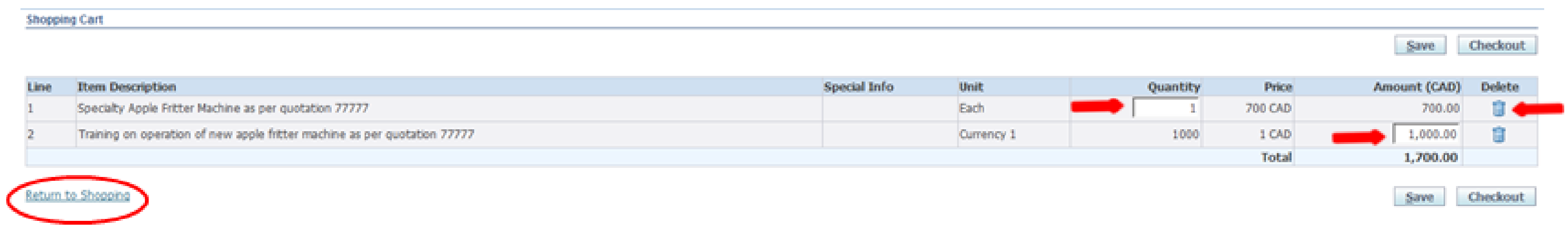
The supplier information will remain the same. Note one requisition should have only one supplier. If you change the Item Type the form will reset as the fields will change. Please make sure to update the information as required.



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

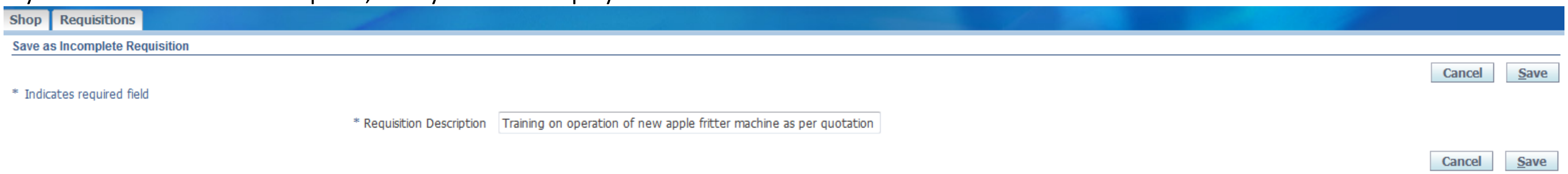


When you have all your items added to the cart for this supplier's purchases you can View Cart and Checkout View Cart and Checkout. This will move you to a screen to view your current items and you can make changes if required:

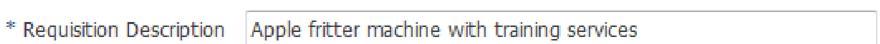


Such as delete an item from the current requisition Delete; Change Amount or Quantity being purchased; return to shopping Return to Shopping to add more items; save the requisition to complete at a later time Save or proceed to checkout Checkout.

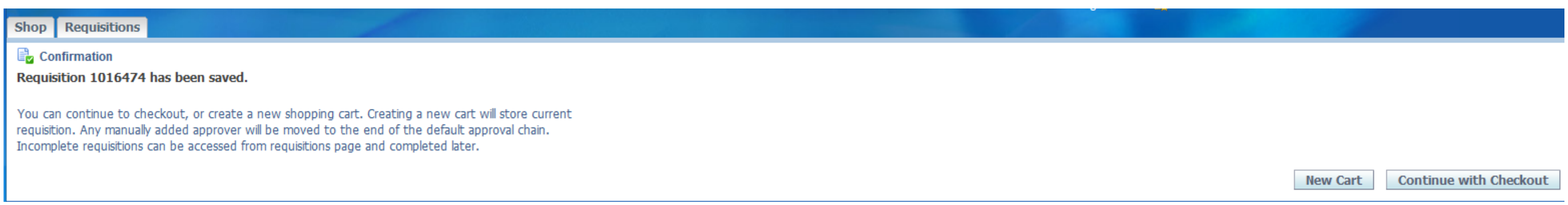
If you save Save at this point, the system will display as follows:



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.

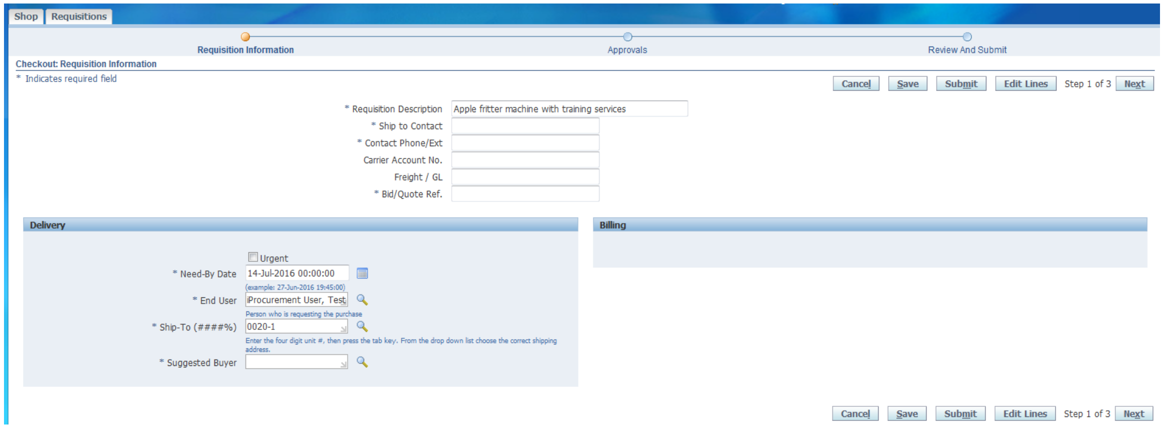


After updating the description click on the save button, this will save the change and you will receive a confirmation:



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

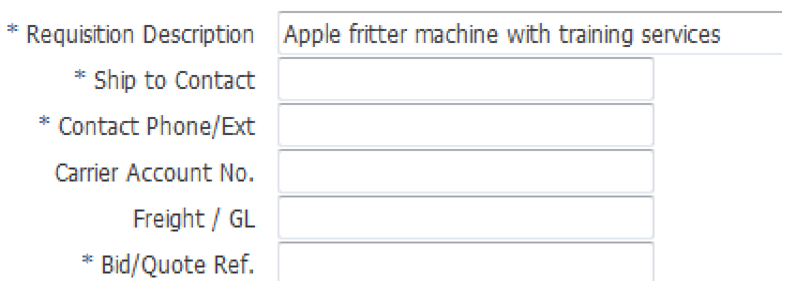
Continue with checkout:



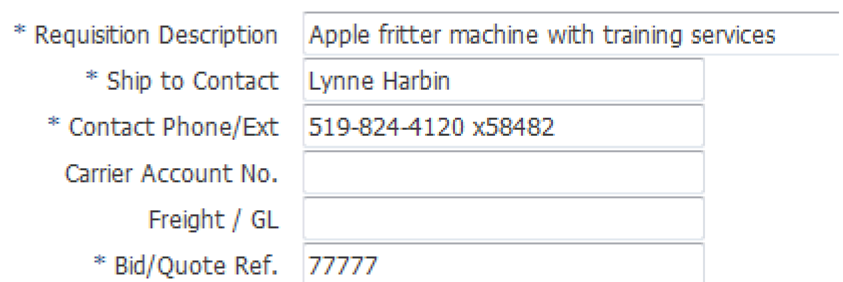
The upper portion of this form is the header section of the requisition. The lower half of this screen will contain the information that will default into the items of the requisition.

3. Requisition Information

Before:



After information entered:



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

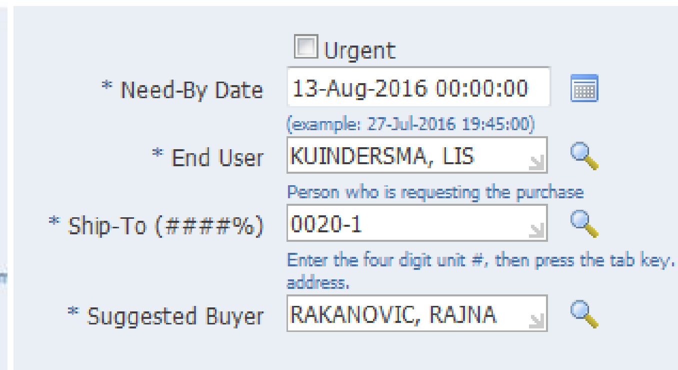
3.5 Freight/GL: If you have the GL coding to be used for Freight charges please enter here, otherwise leave blank

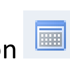
3.6 Bid/Quote Ref.: enter the supplier quote number

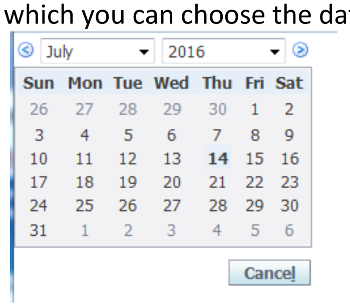
Requisition item defaults:

Before:

After information entered:



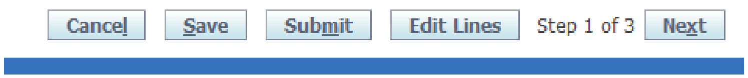
3.7 Need-By Date: enter the date the goods/services are needed for, note that you can click on the icon  to have a calendar display which you can choose the date from



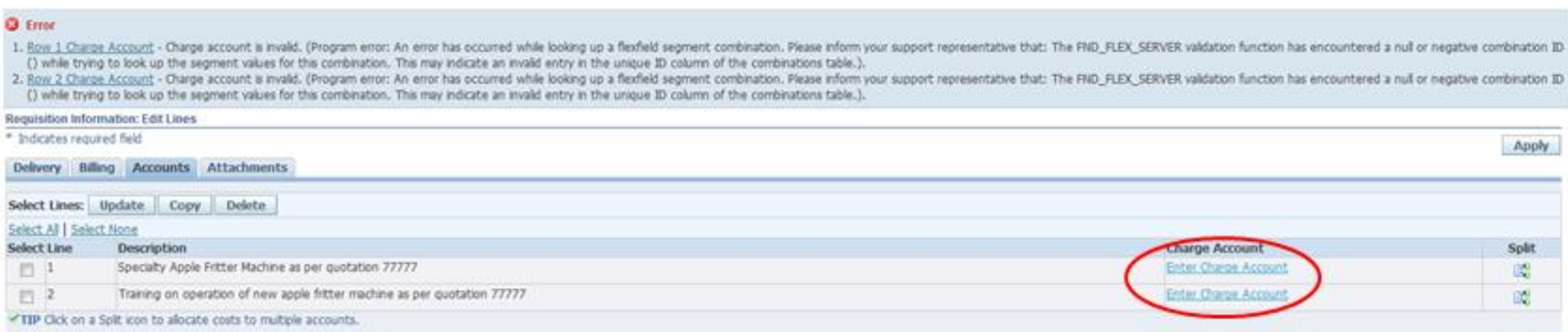
3.8 End User: enter/choose from the list the person who is requesting the purchase. Please update this if you are not the person requesting the purchase.

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)

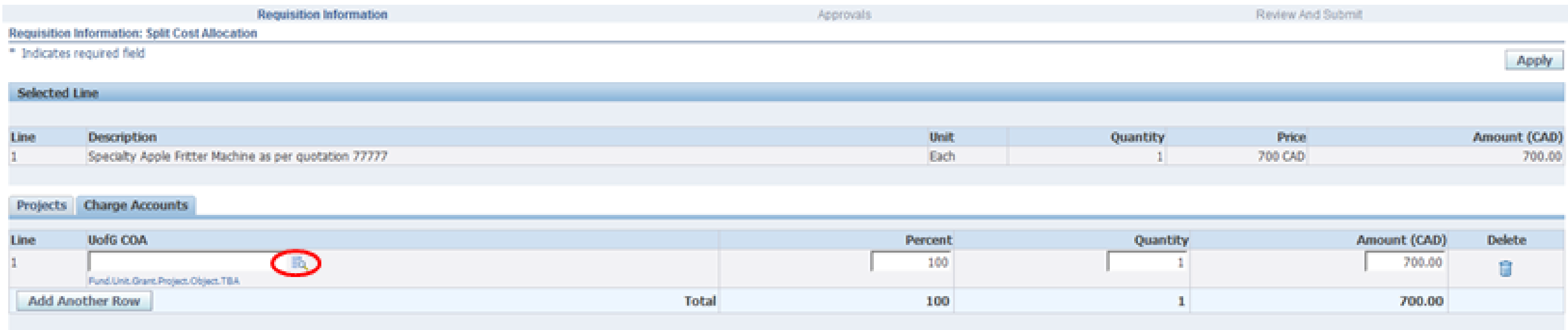


Once the information is completed you can use the Next button to move forward. An Error message will be displayed cautioning you that the charge account information is invalid. Click on the Enter Charge Account link to correct this:

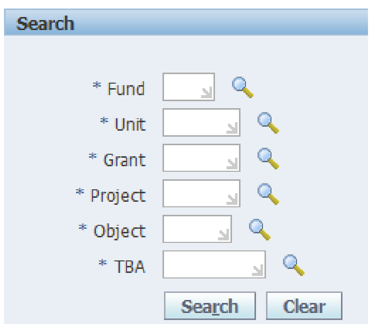


3.11 General Ledger Account:

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

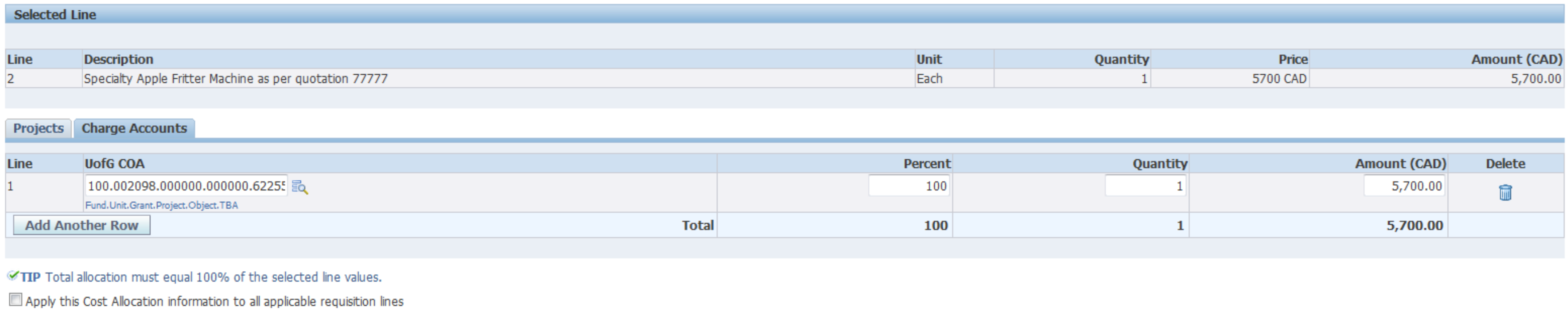


There is a list available, by clicking on the icon beside the field, it will open a search and select window.



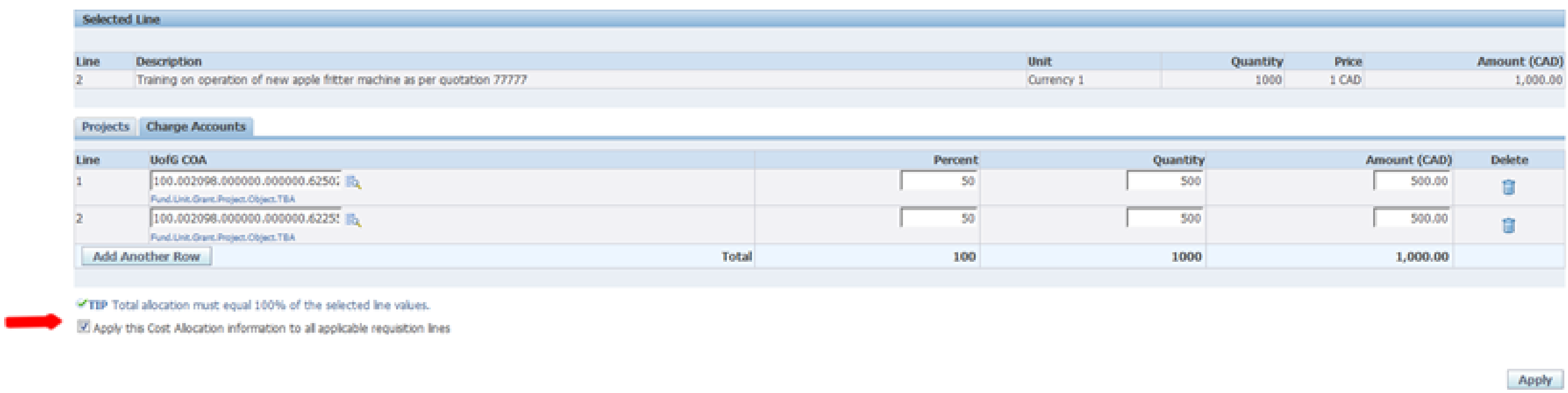
You can enter the segments here, or use the to search on individual segments.

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



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



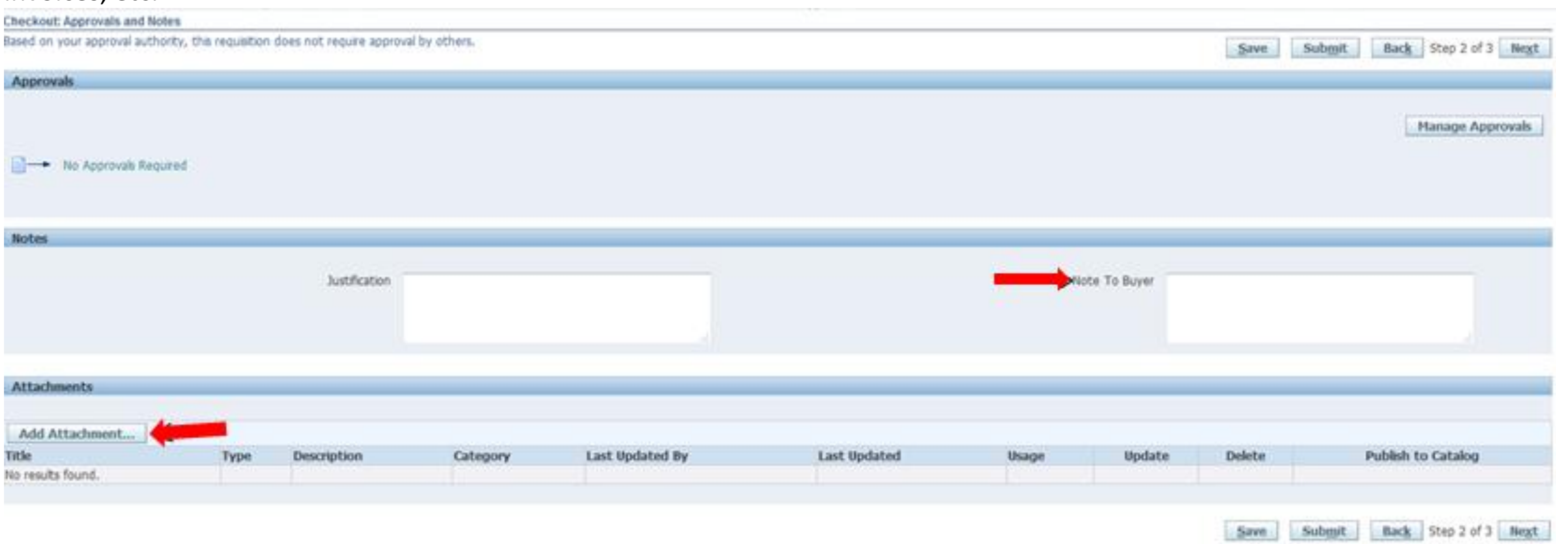
NOTE: If you have multiple charge accounts against one line item all invoices for that line will be split this way. For example the above coding will result in every invoice being slit and paid 50% to each account for this line item 1. If you receive an invoice where you wish the full amount to be paid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

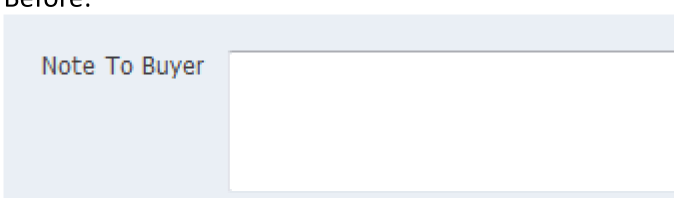
3.12 Attachments:

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.

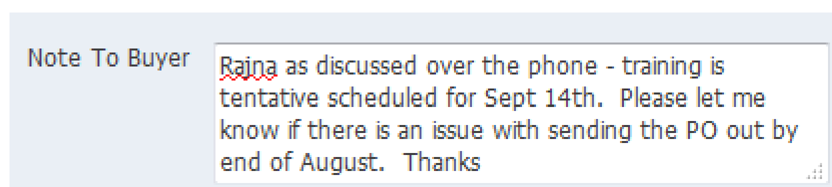


There are two areas for this. If you wish to give the buyer a quick note that remains only on the requisition you can use the Note to Buyer:

Before:

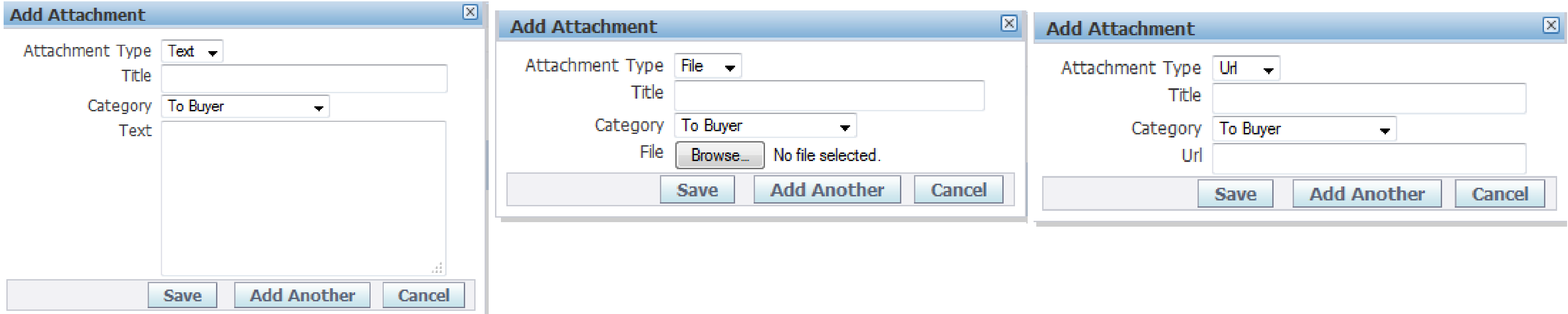


After information entered:



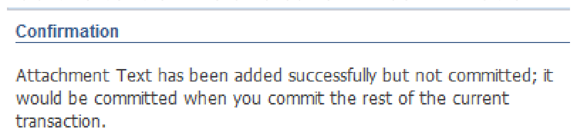
Add Attachment… 

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:



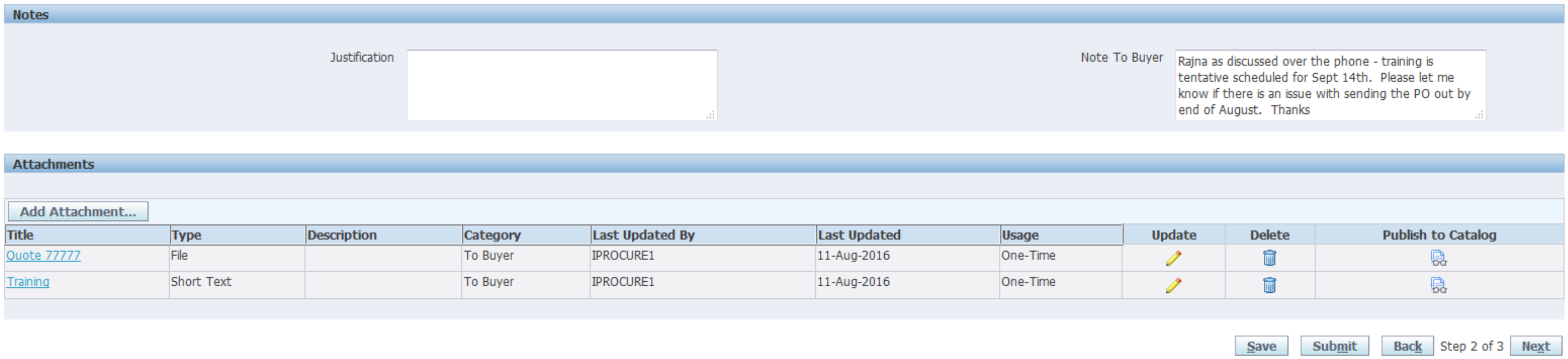
Text type: allows typing a note into the text box
File type: allows additing files
Url Type: allow adding a Url address (this is not used at present)

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:



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

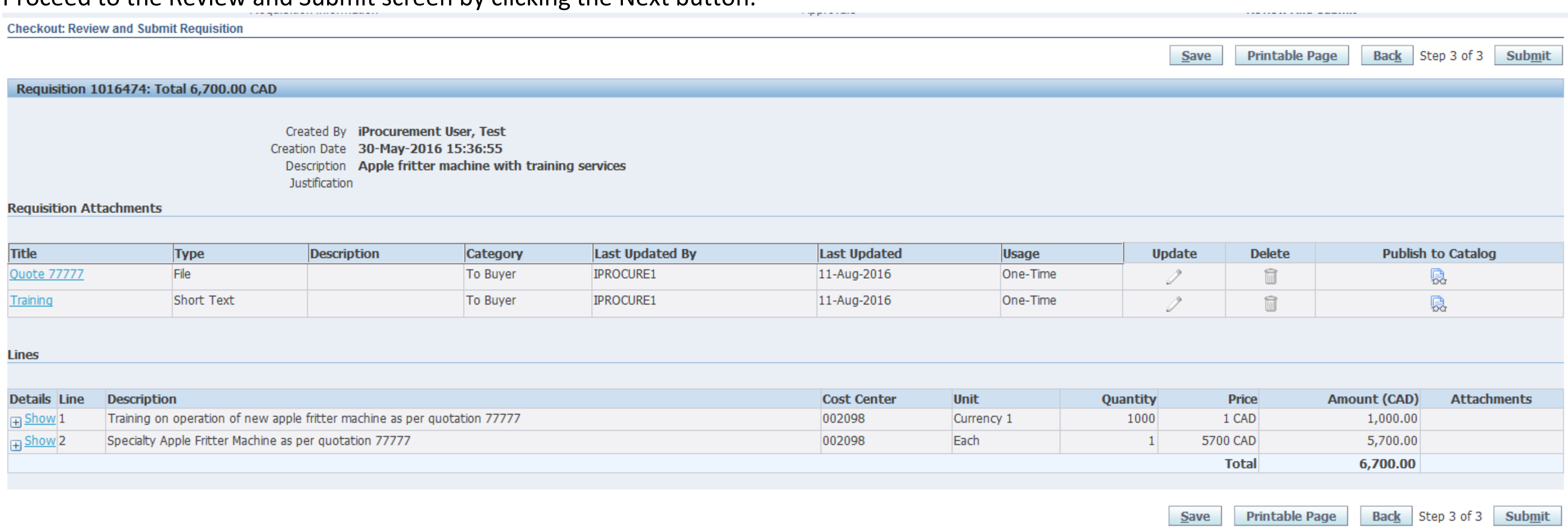
Add Attachment...

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
Show	1	Training on operation of new apple fritter machine as per quotation 77777	002098	Currency 1	1000	1 CAD	1,000.00	
Show	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
○	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
○	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, P0S 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:L5
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		
Show	2	Miscellaneous			Training on operation of new apple fritter machine as per quotation 77777	Currency 1	1000	1	1,000.00	Open		