



Purchase Requisition


1. From **My Favorites**, click on **Requisition**.

2. On Create Requisition screen, click on **Express Item Entry**.


The screenshot displays the Oracle eProcurement interface. At the top, a navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A 'Favorites' dropdown menu is open, showing a list of items including 'Requisition', which is highlighted with a red arrow and the number '1'. Below this, the breadcrumb trail reads 'eProcurement > Requisition'. The main content area is titled 'Create Requisition' and features a search bar and a 'Request Options' dropdown. A grid of options is visible, including 'Express Item Entry' (Create an Express Requisition), 'Special Requests' (Create a non-catalog request), 'Templates' (Browse Company and Personal Templates), and 'ePro Services' (Request Services, Fixed Cost Service, Variable Cost Service, Time and Materials). A red arrow and the number '2' point to the 'Express Item Entry' option.



- For non-store items, fill out **Description, Quantity, UOM, Price and Category**. Please see list of category codes to be provided on traini   to add/delete lines as needed.
- Click **Add to Cart**. Item on cart will indicate number of lines.
- Click on Checkout.











**For Stores
Use Only**

Home My Preferences Requisition Settings |  0 Lines **Checkout** **5**

Search All **Search** Advanced Search

Express Item Entry 

Line **3** Personalize Find View All   First 1-2 of 2 Last

Item ID	Supplier Item ID	Description	Quantity	UOM	Category	Price	Merchandise Amount	Supplier Name
1	<input type="text"/>	Posters 	10.0000	EA 	10000000 	22.0000	220.00	 
2	<input type="text"/>	Maps 	12.0000	EA 	10000000 	130.0000	1560.00	 

Add to Cart **4**

6. Enter **Requisition Name** and choose **Priority**.
7. If you are using the same chartstring for multiple lines, click on **Select All/Deselect All**. (If not, click on line items and add chartstring individually.)
8. Click on **Mass Change** link.

Links - SDCOE Customer R... Requisition

https://sdf92.erp.sdcoe.net/psp/sdf92/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCLURE_REQ.GBL?BUSINESS_UNIT=05100&REQ_ID=NEXT&PAGE=PV_ALL_RQST_OPTION&Fol

Oracle

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 05100 Vista Unified
 Requisition Name: 140 Academic Superstore
 Requester: 518490 Socorro Ugarte
 Priority: Medium
 *Currency: USD

Cart Summary: Total Amount 1,780.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	POSTERS			10.0000	Each	22.0000	220.00		Add	
2	MAPS			12.0000	Each	130.0000	1560.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 1,780.00 USD

Shipping Summary

Edit for All Lines

Requisition Comments

Enter requisition comments

9. Enter **Supplier ID, Ship To Location, Due Date and Attention**. No need to fill **Buyer, Supplier Location and Category**.
10. Enter **Location, Percent** and **Chartstring**. If using more than one (1) chartstring, indicate % to be charged to each account.
- Click on **+** **-** to add or delete lines as needed.
11. Click **OK**.

Matching Distribution Lines

Apply changes to each existing distribution line by matching the distribution line numbers.

Will appear. Click **OK**.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Supplier ID: 110146 Supplier Location: MAIN
 Buyer: Category:

Shipping Information

Ship To Location: 0000000730
 Address: Add One Time Address
 Due Date: 09/26/2015
 Attention: Library/Mr. Smith

Accounting Lines

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1

Location	Percent	Fund	Resource	Goal	Function	Object	Site
1 0000000140	100.0000	0100	6300000	1110	1000	4300000	140

Load Values From Defaults

OK Cancel

12. Enter [Requisition Comments](#) and [Approval Justification](#). Click [Save and Submit](#).
13. On [Confirmation Page](#): System assigns [Requisition ID](#). [Budget Status](#): **Not checked**. Screen shows workflow.
14. Click on [Check Budget](#).

Requisition Comments

Enter requisition comments

This is to submit purchase requisitions (non-store items) using lottery account.

Contract # 1516XXXX

Send to Supplier

Show at Receipt

Shown at Voucher

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Approval Justification

Enter approval justification for this requisition

Type justification here

Check Budget

Pre-Check Budget

Save & submit

Save for Later

Add More Items

Preview Approvals

Confirmation

Your requisition has been submitted.

Requested For Socorro Ugarte
 Requisition Name 140 Academic Superstore
 Requisition ID 0000000127
 Business Unit 05100
 Status Pending
 Priority Medium
 Budget Status Not Checked

Number of Lines 2
 Total Amount 1,780.00 USD

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14

View printable version

Edit This Requisition

Check Budget

Pre-Check Budget

Resource Approval

140 Academic Superstore: Pending

Resource Approval

Pending

Alice Asias
 Requisition Approval Resource

Apply Approval Changes

Create New Requisition

Manage Requisitions

15. If document fails budget check: Click **OK**. Go to the bottom of the screen that shows **Budget Checking Status: Error**. Click on **Error**.

The screenshot displays the Oracle Procurement Requisition interface. At the top, the browser address bar shows the URL: https://sdfx92.erp.sdcoc.net/psp/sdfx92_3/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCURE_REQ.GBL?Page=PV_REQ_CHECKOUT&Action=U. The breadcrumb navigation indicates the path: Main Menu > eProcurement > Manage Requisitions > Requisition. The page title is "Edit Requisition - Review and Submit".

The "Requisition Summary" section shows the following details:

- Business Unit: 05100
- Requester: 518490
- *Currency: USD
- Vista Unified
- Socorro Ugarte
- Requisition Name: 140 Academic Superstore
- Requisition ID: 0000000127
- Priority: Medium

The "Cart Summary" indicates a Total Amount of 1,780.00 USD. A message box is displayed in the center, stating: "Current document has failed budget check. (10222,23)". An "OK" button is visible in the message box. A red number "15" is placed to the right of the message box, with a blue arrow pointing from it to the "OK" button and another blue arrow pointing from it to the "Error" text in the "Budget Checking Status" field at the bottom.

The "Requisition Lines" table is partially visible:

Line	Description	Item ID	Supplier	Total	Details	Comments	Delete
1	POSTERS		ACADEMIC SUPERSTORE	220.00		Add	
2	MAPS	12.0000	ACADEMIC SUPERSTORE	1560.00		Add	

At the bottom of the screen, the "Budget Checking Status" is displayed as **Error**. Below this, there are several buttons: "Check Budget", "Pre-Check Budget", "Save & submit", "Save for Later", "Add More Items", and "Preview Approvals".

16. Line Exceptions tab shows reason for exception.

17. E-mail Fiscal Services to add account with zero budget. When added, you may go back to the requisition. Click [Check Budget](#), then click [Save and Submit](#).

Requisition Exceptions | **Line Exceptions** 16

Business Unit 05100 Requisition ID 0000000127

*Exception Type Error
Maximum Rows 100

Override Transaction More Budgets Exist
Advanced Budget Criteria

Search

Budgets with Exceptions Personalize | Find | View All | First 1-2 of 2 Last

Budget Override		Budget Chartfields					
	Details	Business Unit	Ledger Group	Exception	More Detail	Override Budget	Transfer
1		05100	KK_DETAIL	No Budget Exists	More Detail	<input type="checkbox"/>	Go To ...
2		05100	KK_DETAIL	No Budget Exists	More Detail	<input type="checkbox"/>	Go To ...

Save Return to Search Notify

Manage Requisition

1. From [My Favorites](#), click on [Manage Requisition](#).
2. Click on [Req 0000000127](#). On Select Action, click [Edit](#). Message “Requisition is pending approval. ..”Click [OK](#).

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text" value="05100"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text"/>	Request State	All but Complete
Date From	<input type="text" value="08/29/2015"/>	Date To	<input type="text" value="09/05/2015"/>
Requester	<input type="text" value="518490"/>	Entered By	<input type="text"/>
		Budget Status	
		PO ID	<input type="text"/>

[Show Advanced Search](#)

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.



Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000000127	140 Academic Superstore	05100	09/05/2015	Pending	Error	1,780.00 USD	<input type="text" value="Edit"/> <input type="button" value="Go"/>
▶ 0000000126	140 Stores	05100	09/05/2015	Pending	Valid	360.50 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000125	140 Stores	05100	09/05/2015	Pending	Valid	360.50 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000124	0000000124	05100	09/04/2015	Pending	Valid	5.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000122	140 Donations/Interven/...	05100	09/03/2015	Pending	Valid	5,001.40 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000121	140 A & D	05100	09/03/2015	Pending	Valid	50.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000120	0000000120	05100	09/03/2015	Pending	Valid	100.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000119	0000000119	05100	09/02/2015	Approved	Valid	1,000.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000066	ORDER 8/31/15	05100	08/31/2015	Received	Valid	4,000.00 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>
▶ 0000000065	STORES OFFICE SUPPLIES	05100	08/31/2015	Approved	Valid	14.33 USD	<input type="text" value="<Select Action>"/> <input type="button" value="Go"/>

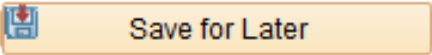
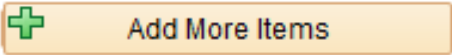
[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

2

- Edit Requisition screen opens up. In the bottom of the screen, click on [Check Budget](#). Message: This action will restart the approval process. Click [OK](#). Budget checking warning may exist if you have not done budget transfer. Click [OK](#).
- The Confirmation screen will show Budget Status: [Valid](#).
- Pre-encumbrance Balance shows under Total Amount.

Click Here

 [Check Budget](#) ³
 [Pre-Check Budget](#)
Budget Checking Status: **Error**

 [Save & submit](#)
 [Save for Later](#)
 [Add More Items](#)
 [Preview Approvals](#)

Confirmation

Your requisition has been submitted.

Requested For	Socorro Ugarte	Number of Lines	2
Requisition Name	140 Academic Superstore	Total Amount	1,780.00 USD
Requisition ID	000000127	5 Pre-Encumbrance Balance	1780.00 USD
Business Unit	05100		
Status	Pending		
Priority	Medium		
4 Budget Status	Valid		



 [View printable version](#)
 [Edit This Requisition](#)
 [Check Budget](#)
 [Pre-Check Budget](#)

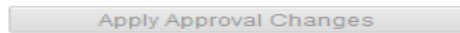
Resource Approval



140 Academic Superstore: Pending

Resource Approval

Pending

 Alice Asias
Requisition Approval Resource

 [Apply Approval Changes](#)

 [Create New Requisition](#)
 [Manage Requisitions](#)