

CREATING PURCHASE REQUEST

1. Purpose

1.1. To have a standard navigational instruction to Purchasing users of Oracle in **creating a Purchase Request**.

2. Scope

2.1. Purchasing Users of Oracle nationwide.

3. Implementing Guidelines

3.1. Refer Finance and Accounting SOP No. 06-014 version 03 for detailed policy in creating Purchase request.

4. Navigation Procedures

4.1. Navigate to **RPI PR-Department > Requisitions > Requisition**

Home

The screenshot shows the Oracle Navigator on the left and the Worklist on the right. In the Navigator, the path 'RPI PR-OPERATIONS' (01) is expanded, showing 'Supplier Item Catalog', 'Purchase Requisition' (02), 'Requisition Summary', and 'Requisitions' (03). The 'Requisitions' link is highlighted with a red box. The Worklist on the right shows a table with columns: From, Type, Subject, Sent, and Due. A single entry is visible: From: NOTORIO, MERCY; Type: Requisition; Subject: Purchase Requisition 15166 has been rejected; Sent: 29-Apr-2022. A 'Full List (1)' button is in the top right of the Worklist. Below the table, there is a link for 'TIP Vacation Rules - Redirect or auto-respond to notifications.'

4.2. Fill in required fields in Requisition Header

4.2.1. "Type" – Purchase Requisition

4.2.2. "Purpose"

4.2.3. "DFF" – Request Type, Expenditure Type, Budget Code

The screenshot shows the Oracle Requisition Header form. The 'Operating Unit' is 'Rose Pharmacy, Inc.'. The 'Type' is 'Purchase Requisition' (4.2.1). The 'Purpose' is 'May-22 CEB-Ayala' (4.2.2). The 'Status' is 'Incomplete'. The 'Prepared By' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Total' is 'PHP 0.00'. The 'DFF' section (4.2.3) is expanded, showing 'Request Type', 'Expenditure Type', and 'Budget Code'. The 'Request Type' is 'DFF'. The 'Expenditure Type' is 'DFF'. The 'Budget Code' is 'DFF'. The 'Destination Type' is 'Requester'. The 'Requester' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Organization' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Location' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Subinventory' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Source' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Supplier' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Site' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Contact' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Phone' is 'OREJAS, Ms. MERRY ANN ESPZ'. The 'Submit for Approval' button is highlighted.

4.3. Fill in "Type" in requisition line – Goods, RPI Services, Fixed Asset, etc.

The screenshot shows the 'Requisitions - [New]' window. The 'Operating Unit' is 'Rose Pharmacy, Inc.', 'Type' is 'Purchase Reqt', 'Preparer' is 'OREJAS, Ms. MERRY ANN ESPJ', 'Purpose' is 'May-22 CEB-Ayala', 'Status' is 'Incomplete', and 'Total' is 'PIIP 0.00'. The 'Lines' tab is active, showing a table with columns: Num, Type, Item, Rev, Category, Description, UOM, and C. The first line (Num 1) has 'Type' set to 'Goods'. A 'Line Types' dialog box is open, showing a list of line types with 'Goods' selected. The dialog box has a search field and a table with columns: Line Type, Value Basis, Purchase Basis, and Description. The table lists: CIP (Quantity, Goods, Construction), Fixed Asset (Quantity, Goods, Fixed Asset), Goods (Quantity, Goods, All goods that), Non Vat Items (Quantity, Goods, Non Vat Items), and RPI Services (Quantity, Goods, RPI Services).

4.4. Select **Catalog** button ➤ Find the Supplier ➤ Select **Options** button ➤ Add the following:

4.4.1. Need-By

4.4.2. Organization

4.4.3. Location

4.4.4. Expense Charge account

The screenshot shows the 'Requisitions - [New]' window. The 'Operating Unit' is 'Rose Pharmacy, Inc.', 'Type' is 'Purchase Reqt', 'Preparer' is 'OREJAS, Ms. MERRY ANN ESPJ', 'Purpose' is 'May-22 CEB-Ayala', 'Status' is 'Incomplete', and 'Total' is 'PHP 0.00'. The 'Lines' tab is active, showing a table with columns: Num, Type, Item, Rev, Category, Description, UOM, and C. The first line (Num 1) has 'Type' set to 'Goods'. Below the table, the 'Destination Type' is 'Expense', 'Requester' is 'OREJAS, Ms. MERRY ANN ESPJ', 'Organization' is empty, 'Location' is empty, and 'Subinventory' is empty. The 'Source' is 'Supplier', 'Supplier' is empty, 'Site' is empty, 'Contact' is empty, and 'Phone' is empty. The 'Catalog...' button is highlighted with a red box. The 'Distributions' and 'Submit for Approval' buttons are also visible.

Next ➡

Search Supplier Item Catalog

Operating Unit: **Rose Pharmacy, Inc.**

Commodity:

Requisition Template:

Item

Category Set:

Category:

Item, Rev:

Description:

Job:

Line description contains the words in sequence only:

Supplier: **PRINCE WAREHOUSE** 4.4.A

☐ Sourced Suppliers Only

Site:

Supplier Item:

Due Date:

Deliver-To Organization:

Line Type: **Goods**

☐ Shgw External Locations

UOM:

Deliver-To Location:

Currency:

4.4.B

Next ➡

Supplier Item Catalog

Negotiated Sources

Supplier: **PRINCE WAREHOUSE**

UOM: Quantity:

Order Total:

Order Pad Options

New Order Pad Lines

☐ Default From Options

☒ Default From Previous Line

Deliver-To Defaults

4.4.1 Need-By: **08-MAY-2022 00**

Destination Type: **Expense**

4.4.2 Organization: **RPO RPI Inventory Organization**

Location: **Mandaue City**

4.4.3 Requestor: **OREJAS, Ms. MERRY ANN ESP**

Subinventory:

4.4.4 Expense Charge Account: **88.710201.35353505.1100.00.00**

Unit of Measure: **REM**

UNT

UNT

PCK

Deliver-To

Org: Loc:

4.5.

- <4.5.A> **Highlight** the item code you want to Purchase ➤
- <4.5.B> Select **ADD** button ➤ **Indicate** the number of QUANTITY ➤
- <4.5.C>. If all items are selected then click the **SELECT** button.

Supplier Item Catalog (Rose Pharmacy, Inc.)

Select Price Only

Negotiated Sources Prior Purchases Sourcing Rules Requisition Templates

Supplier	Item	Commodity	Description	Supplier Item	Unit of Measure
PRINCE WAREHO	NTOS20220000	OpEx.Office St	Bondpaper Short		REM
PRINCE WAREHO	NTFA00000034	CapEx.New St	CONSTRUCTION NEW		UNT
PRINCE WAREHO	NTOS20220000	OpEx.Office St	Calculator Casio		UNT
PRINCE WAREHO	NTOS20220000	OpEx.Office St	Sticky Notes Post-it		PCK

4.5.A

4.5.B

Add Remove Order Pad

Currency

Deliver-To

UOM	Quantity	Item Description	Supplier	Price	Amount	Need-By	Org	Loc
REM	1	Bondpaper Short	PRINCE WAREH	PHP 250		08-MAY-2022 00:	RPO	Mar
UNT	1	Calculator Casio	PRINCE WAREH	PHP 100		08-MAY-2022 00:	RPO	Mar

Order Total Options... Close Catalog Select

4.5.C

- #### 4.6. Save the form ➤ **Highlight** one of the fields in the requisition header ➤ select **Attachment** icon.

Requisitions - 15176

Rose Pharmacy, Inc.

Operating Unit

Number 15176

Type Purchase Requi

Preparer OREJAS, Ms. MERRY ANN ESP

Purpose May-22 CEB-Ayal

Status Incomplete

Total PHP 600.00

[NE]

Lines Source Details Details Currency

Num	Description	UOM	Quantity	Price	Need-By
1	LT Bondpaper Short	REM	1	250	08-MAY-2022 00:00
2	LT Calculator Casio	UNT	1	100	08-MAY-2022 00:00
3	LT Sticky Notes Post It	PCK	5	50	08-MAY-2022 00:00

Destination Type Expense

Requester OREJAS, Ms. MERRY ANN ESP

Supplier PRINCE WAREHOUSE CLUI

Organization RPI Inventory Organization

Site Head Office

Location Mandaue City

Subinventory

Catalog... Distributions Submit for Approval

4.7. Fill-in value in the required fields (you may add info on other fields) – Category, Data type
 ➤ Go to the **BROWSER** and upload the file ➤ Click **SUBMIT** button ➤ **CLOSE** the Browser ➤ Go back to the **ATTACHMENT** form ➤ Select the **YES** button.

Seq	Category	Title	Description	Data Type	May Be Changed
10	To Approver	Request approved by AA		Date	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Entity Name: RLQ Header

Open Document Decision

Has the file been uploaded successfully?

Yes No

Include Ignored Documents Publish to Catalog Document Catalog...

File Upload

Upload File Browse... Customer Billing.xlsx

Submit Cancel Clear

Confirmation

1. File upload completed successfully.
2. * Please close the web browser.
3. * Return to the Attachment form and click the Yes button to indicate file upload is complete.

4.8. Select Publish to Catalog button ➤ Click OK button ➤ Close ➤ Select Submit for Approval & OK

Open

Are you sure you want to publish this document as a standard document to the catalog?

OK Cancel

Entry Name: REQ Header

Include Related Documents

Publish to Catalog Document Catalog...

Next ➡

Requisition Summary to Requisitions - 15176

Operating Unit: Rose Pharmacy, Inc.

Number: 15176 Type: Purchase Requisition Preparer: OREJAS, Ms. MERRY ANN ESPINOZA

Purpose: May-22 CEB-Ayala Status: Incomplete Total: PHP 600.00

Lines Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	Q
1	Goods	NTOS20220000001		DFLT.DFLT	Bondpaper Short	REM	1
2	Goods	NTOS20220000002		DFLT.DFLT	Calculator Casio	UNT	1
3	Goods	NTOS20220000003		DFLT.DFLT	Sticky Notes Post-it	PCK	5

Destination Type: Expense Source: Supplier

Requester: OREJAS, Ms. MERRY ANN ESPINOZA Supplier: PRINCE WAREHOUSE CLUB

Organization: RPI Inventory Organization Site: Head Office

Location: Mandaue City Contact:

Subinventory: Phone:

Catalog... Distributions Submit for Approval

Next ➡

Approve Document - 15176

Approval Details Additional Options

Encumbrance

☐ Reserve ☐ Unreserve Unreserve Date:

☐ Use GL Override ☐ Use Document GL Date to Unreserve Accounting Date:

Approval

☒ Submit for Approval Forward From:

☐ Forward Approval Path:

Note Forward To:

Change Summary

Transmission Methods

☐ Print ☐ XML

☐ Fax FAX Number:

☐ E-Mail E-Mail Address:

OK Cancel

