With on-line requisitions, you can centralize your purchasing department, source your requisitions with the best suppliers, and ensure that you obtain the appropriate management approval before creating purchase orders from requisitions. You can use Master Scheduling/MRP to generate on-line requisitions automatically based on the planning requirements of your manufacturing organization

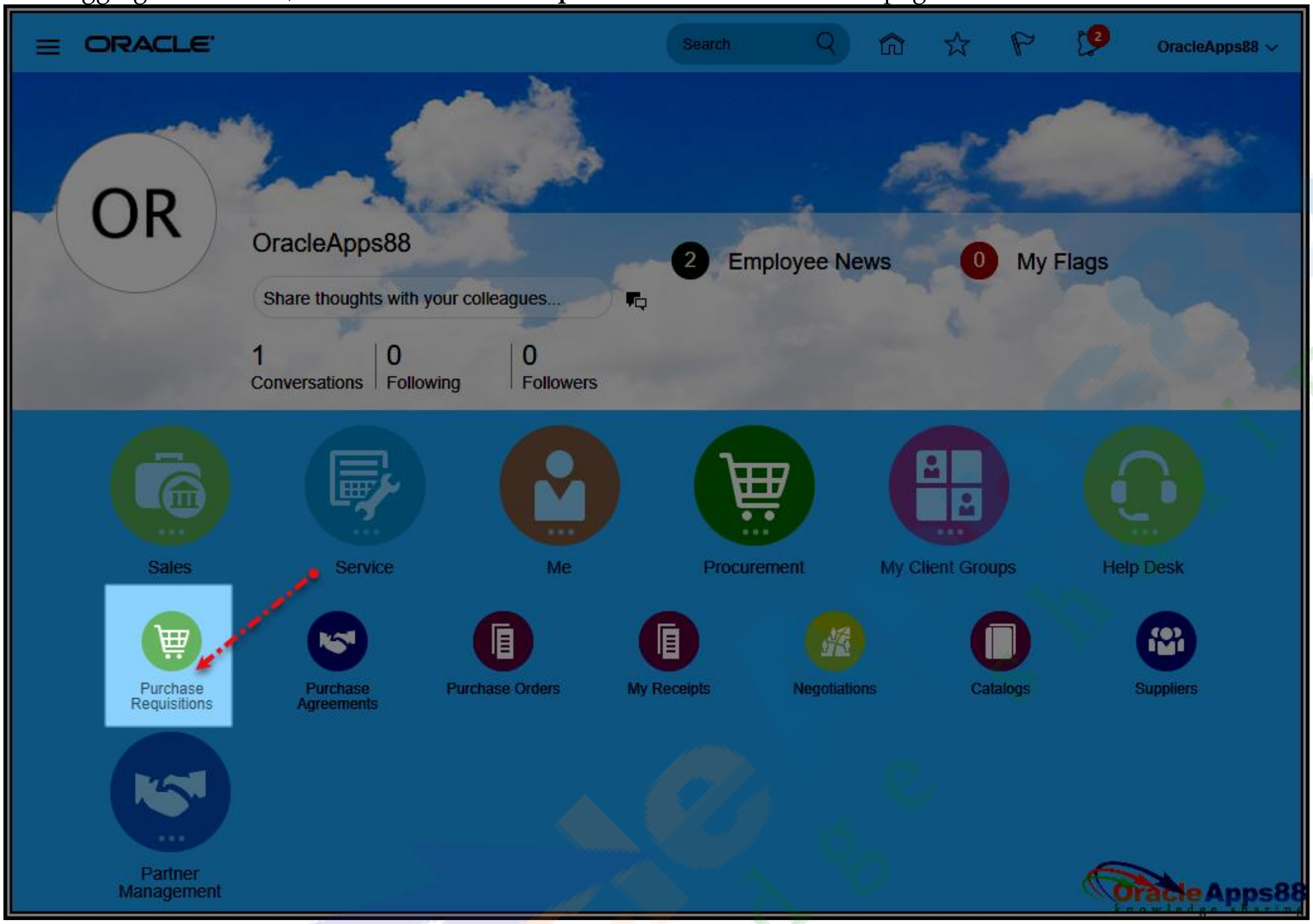
Purchasing provides you with the features you need to satisfy the following basic requisition needs.
You should be able to:

- o Create, edit, and review requisition information on-line. You should also be able to enter suggested supplier information, delivery instructions, multiple accounting distributions, and notes to buyers, approvers, and receivers.
- o Review the current status and action history of your requisitions. You should always know who approves requisitions and whether they are in the approval, purchasing, receiving, or delivery stage.
- o Route requisitions according to your approval structure. You should also be able to set authorization limits by amount, charge account, item category, and location.
- o Review and approve requisitions that need your approval. You should also be able to see the full requisition detail and review the action history before you approve a requisition.
- o Print requisitions (with status Approved, Cancelled, Rejected, In Process, Pre-Approved, and Returned) for off-line review and approval. You should always be able to track the status of requisitions through the approval process.
- o Import requisitions from other systems such as material or distributions requirement planning applications
- o Perform on-line funds checking before creating requisitions. You should always know how your planned expenses compare to your budget.
- o Automatically source requisitions from outstanding blanket purchase agreements or quotations you have received from suppliers
- o Create requisitions quickly and easily for commonly purchased items
- o Provide attachments as notes on requisition headers and lines
- o Assign requisition lines to buyers and review buyer assignments for requisition lines
- o Forward all requisitions awaiting approval from one approver to an alternate approver. Within your security and approval constraints, you should be able to reroute requisitions from one approver to another whenever you want.
- o Record suggested foreign currency information for each requisition line

Table of Contents

Requisitions Overview

1. Logging in to Oracle, click the **Purchase Requisitions** icon on the Homepage.



2. This will open the *Requisitions* page. The sections of the page include:

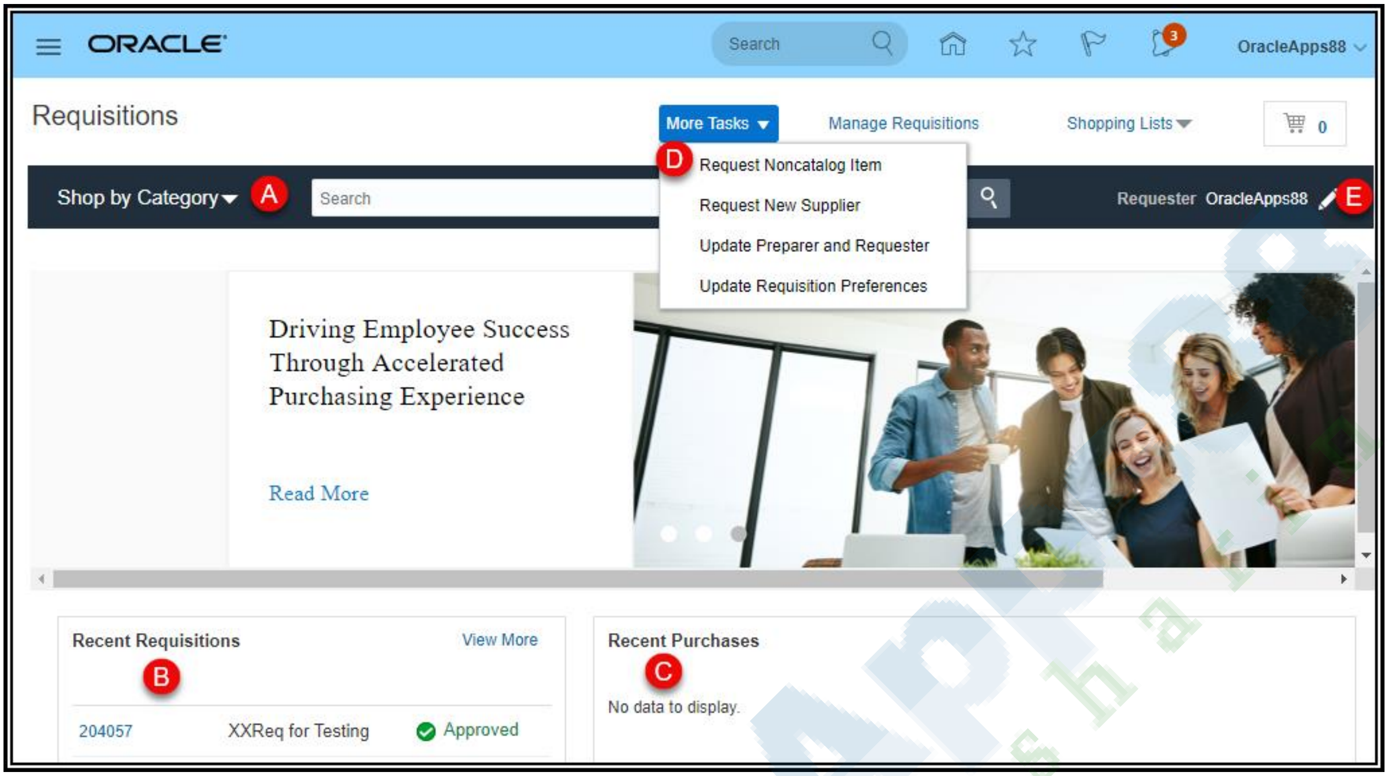
A – Shop by Category (also referred to as Punchouts or Catalogs):
- Provides links to external Supplier/Vendor sites to order items to add to Requisitions

B – Recent Requisitions:
- Displays links to the most recent Requisitions for the logged in user. The list includes the current approval status.

C – Recent Purchases:
- Displays items recently added to a Requisition from a punchout.

D – More Tasks (dropdown) (display will differ depending upon a user's system role/access):
- Provides access to the *Request Noncatalog Item* task (to enter a Requisition for Goods or Services)
  - Note: The following Tasks are not being used:
    - Enter Requisition Line (Task is only displayed for certain users)
    - Request New Supplier (Task is only displayed for certain users)
    - Update Preparer and Requester

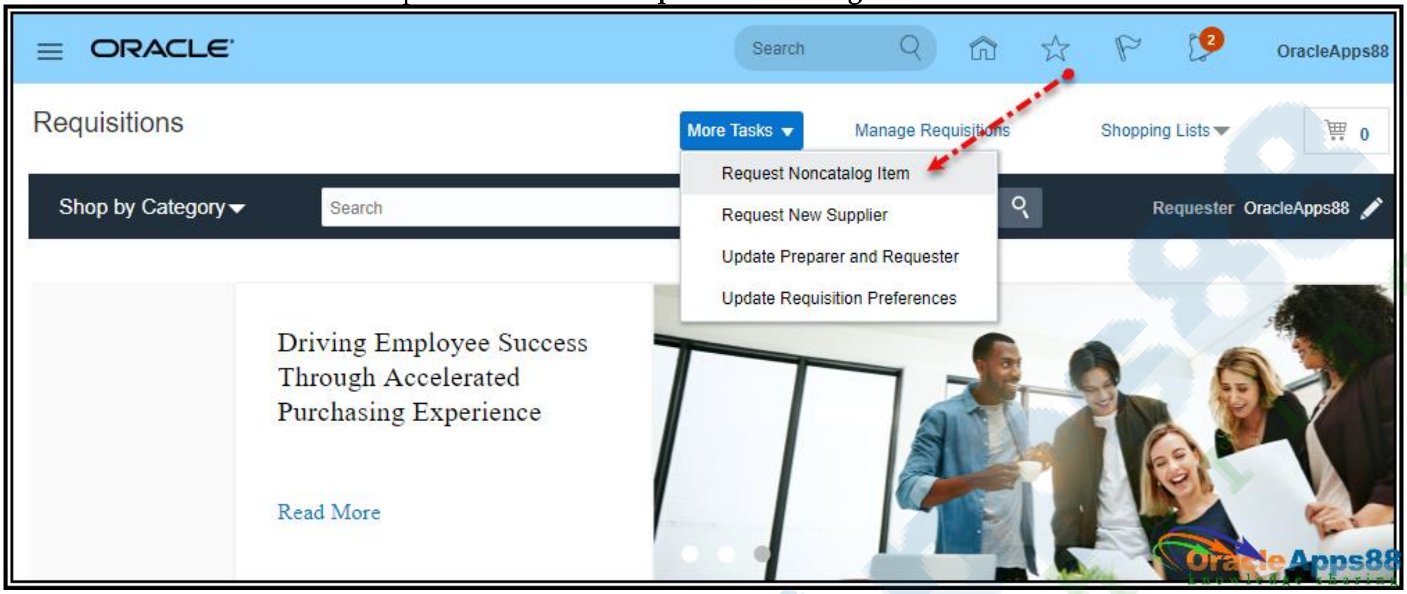
E – Pencil icon to access **Requisition Preferences** to change the Requisitioning BU (Business Unit) for which the Requisition is being entered. (This is only displayed for certain users)
  - Note: The user will only see the pencil icon if he/she has access to multiple Procurement Business Units


ORACLE
Search
OracleApps88
Requisitions
More Tasks
Manage Requisitions
Shopping Lists
0
Shop by Category
A
Search
D
Request Noncatalog Item
Request New Supplier
Update Preparer and Requester
Update Requisition Preferences
Requester OracleApps88
E
Driving Employee Success Through Accelerated Purchasing Experience
Read More
Recent Requisitions
View More
B
204057
XXReq for Testing
Approved
Recent Purchases
C
No data to display.

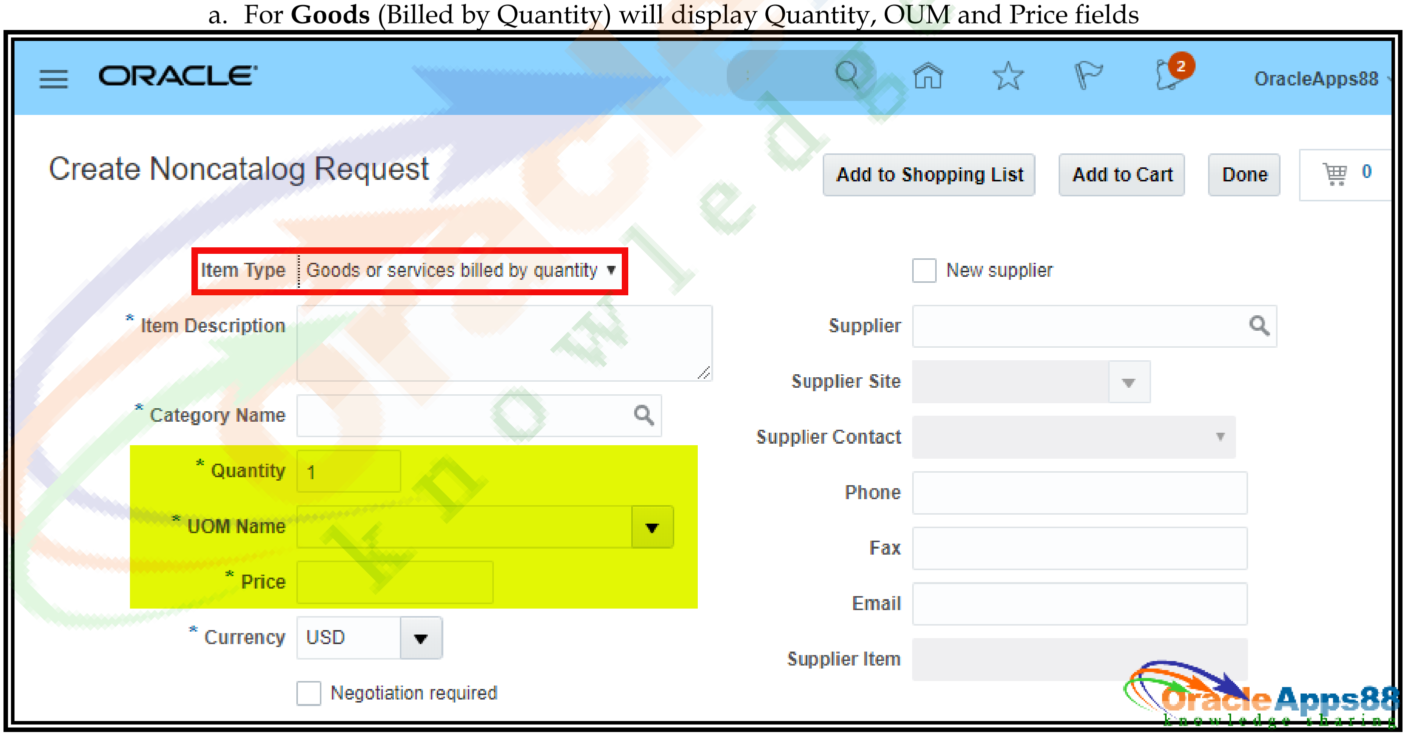
Creating Requisitions

Creating a Noncatalog Request for Goods or Services

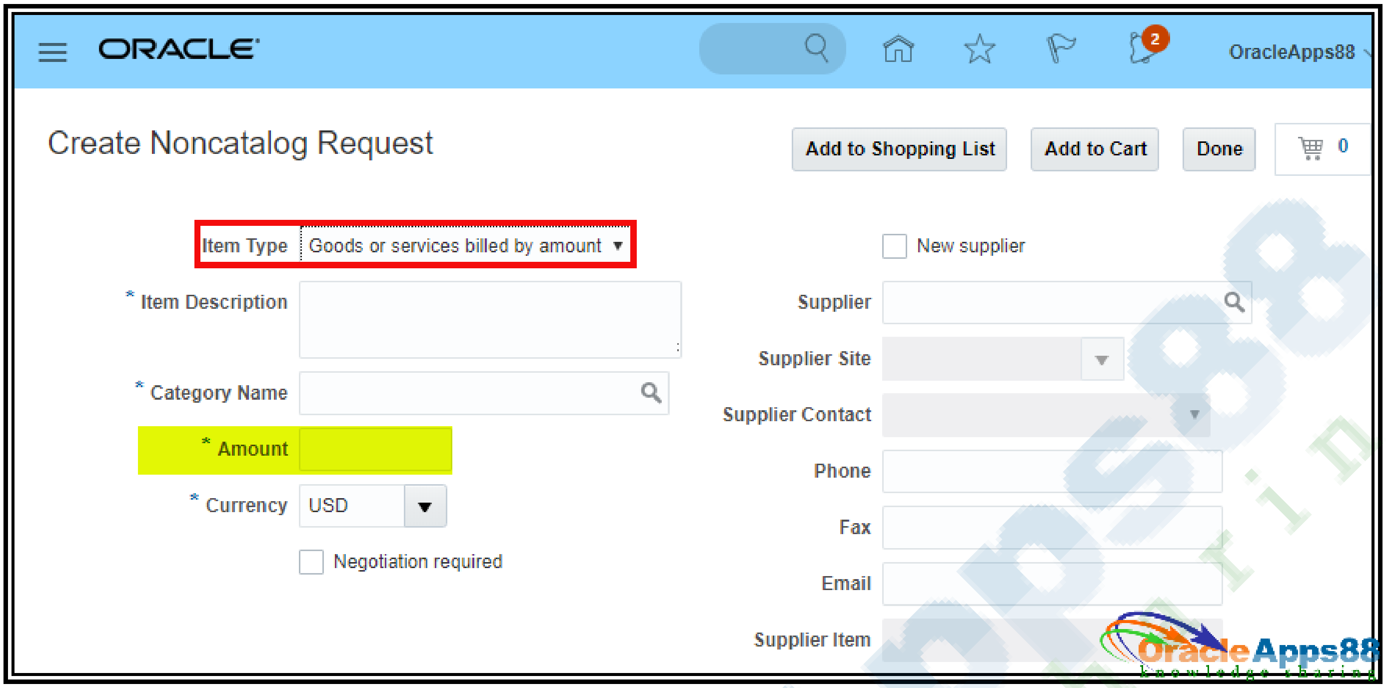
1. Click the **More Tasks** dropdown and select **Request Noncatalog Item**.



2. The *Create Noncatalog Request* page is displayed.
   i. Note: Fields with an asterisk* next to them are required fields and must be populated to continue.
3. Begin by selecting the **Item Type = Goods or Services**
   i. Note: Depending upon the Item Type selected, the fields displayed will vary:
      a. For **Goods** (Billed by Quantity) will display Quantity, OUM and Price fields

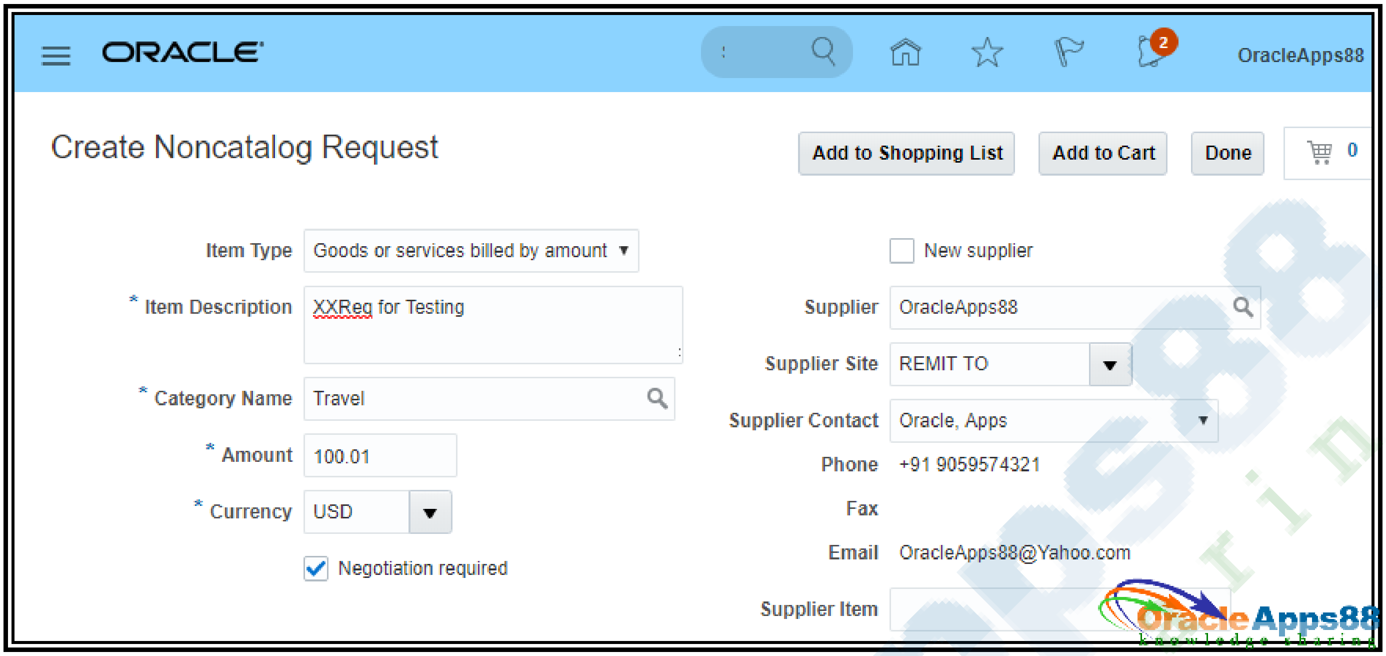


      b. For **Services** (Billed by Amount) will display the Amount field

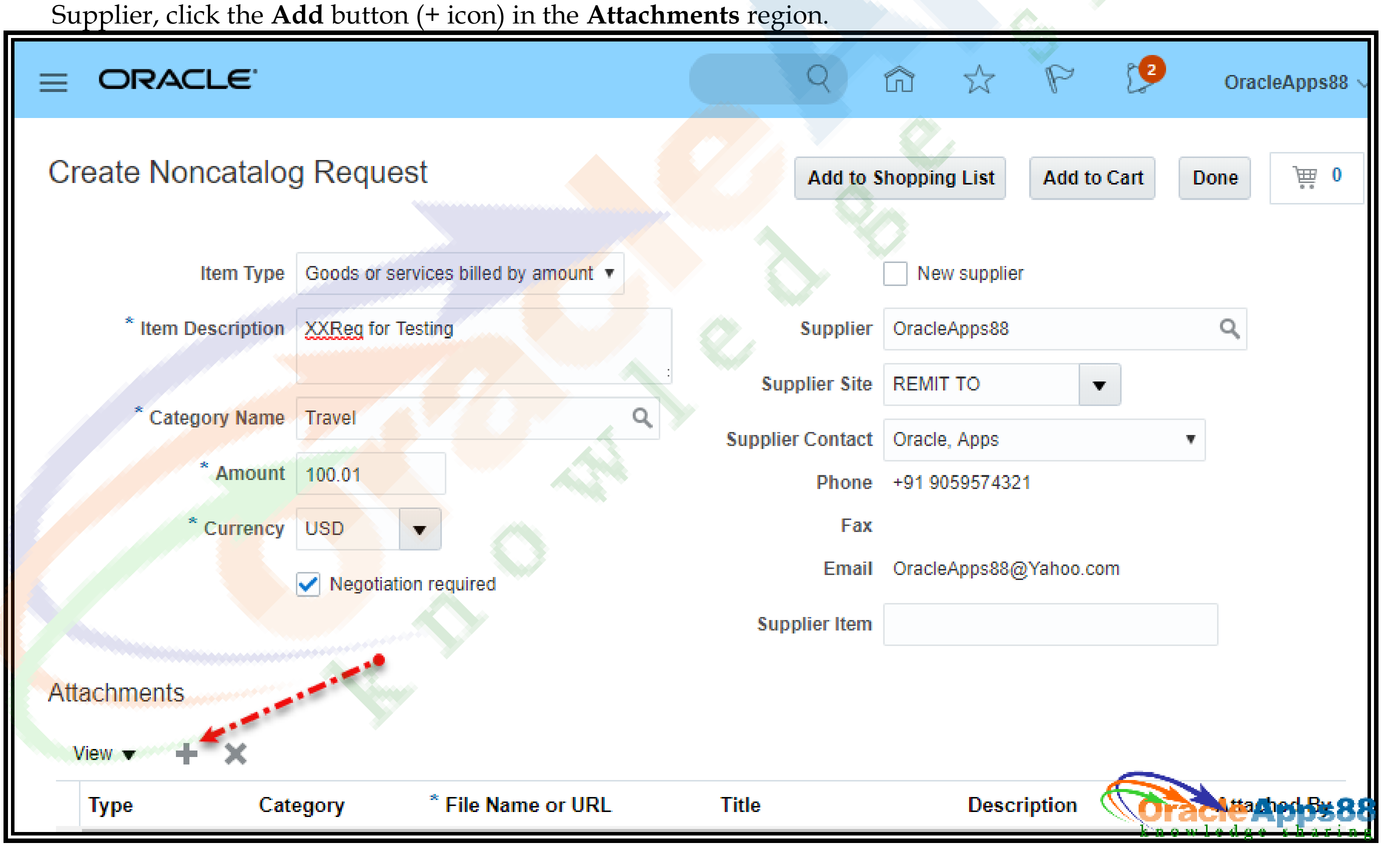


4. Enter an **Item Description** (A).
5. Enter the **Category Name** – examples Consulting Fees/Lab Supplies/Office Supplies/etc.
   i. Enter a partial value of the Category in the Category Name field (B) and the Category should begin to populate; select the appropriate value (C) from the list as shown.
6. For **Goods**, enter the Quantity, Unit of Measure, Price, and confirm or update the Currency (as applicable).
7. For **Services**, enter the Amount of the Service and confirm or update the Currency (as applicable).

8. Select the **Supplier**.
9. If there is only one Site available, it will default. Otherwise choose the **Supplier Site**.
10. If there is a **Supplier Contact** setup in Oracle, it will be available to select.
11. Enter an optional **Phone** Number, **Fax** and **Email**, if desired.
12. Optionally, enter the **Supplier Item**, if applicable. (Example: A specific supplier part number)
    i. Note: This field becomes editable/available to be populated only once the Supplier is selected.

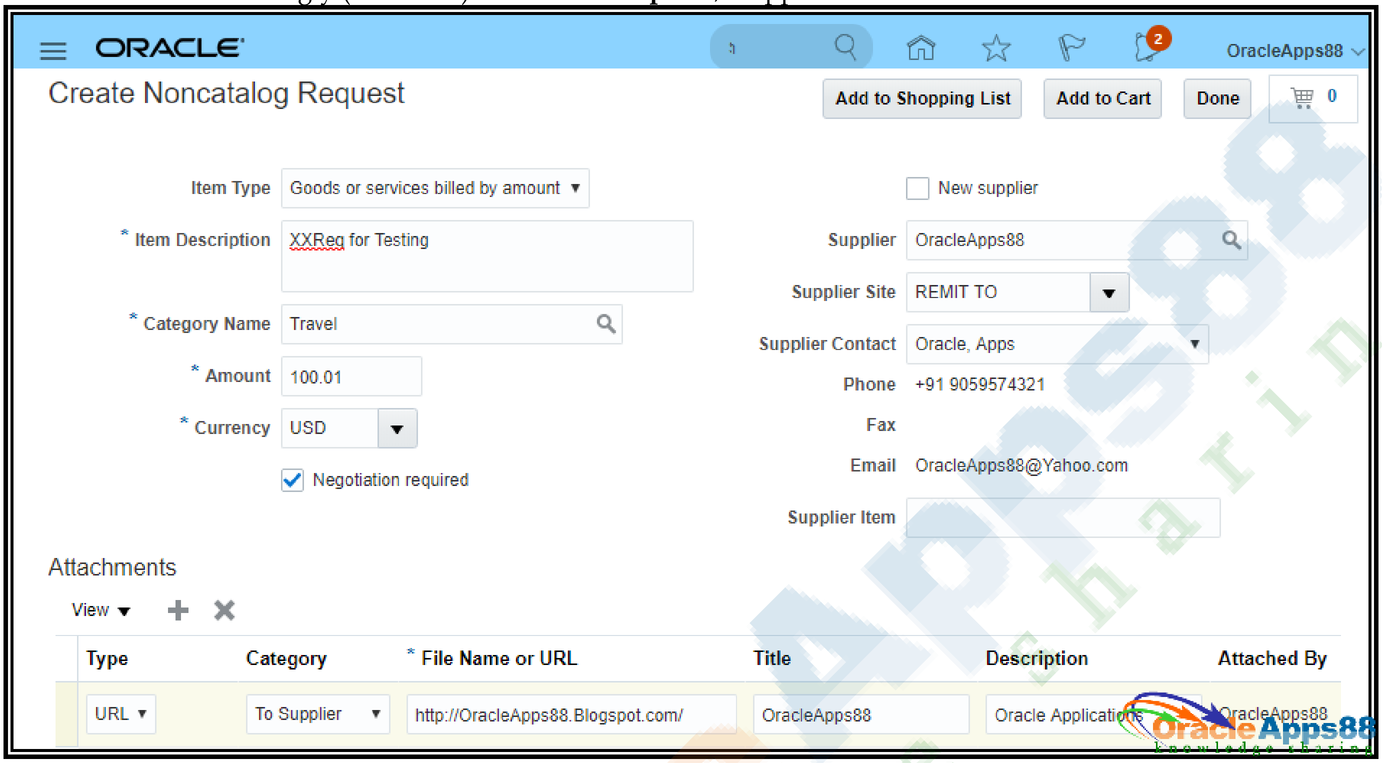


13. To add an attachment such as a copy of a Contract, Master Services Agreement, Quote, etc., or a note to the Buyer or Supplier, click the **Add** button (+ icon) in the **Attachments** region.

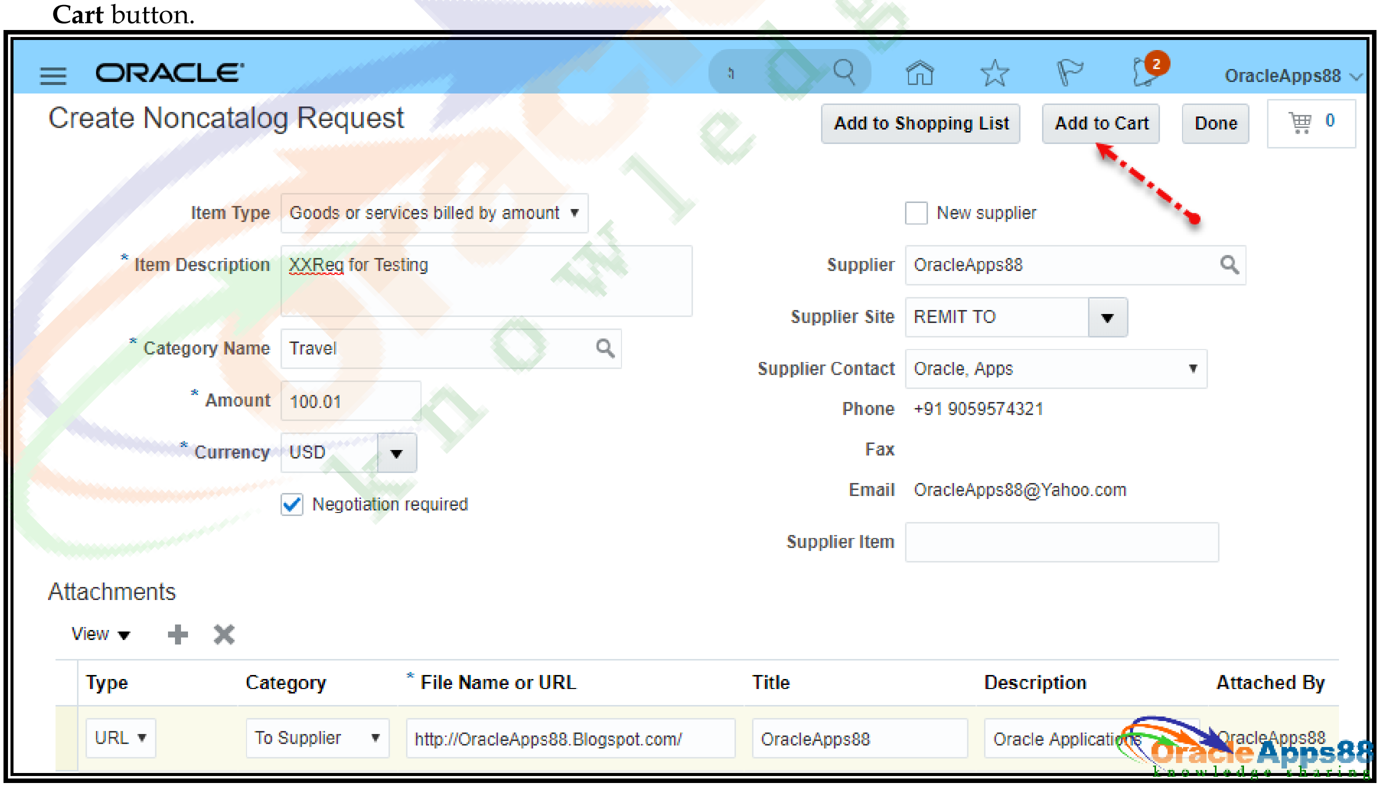


14. In the new line, select the **Type** (File, Text or URL) and **Category** (Internal to Requisition, Miscellaneous, To Approver, To Buyer, To Receiver or To Supplier).
    i. Note: If the Attachment needs to go to more than one person, it must be attached multiple times and the applicable **Category** needs to be selected for each.

15. If the Type is File, click the **Browse** button and find/attach the document.
    i. Wait a few seconds and the Title field will be populated with the file name. Update the **Title** accordingly (if desired). Add a **Description**, if applicable.

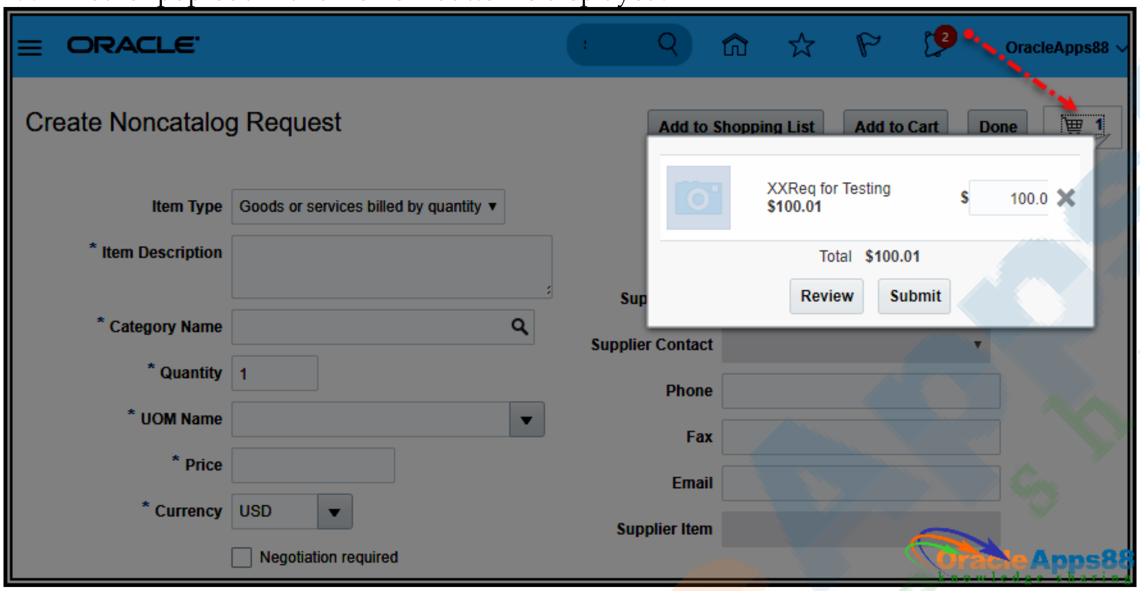


16. Once all fields in the *Create Noncatalog Request* page are completed and the attachment(s) added, click the **Add to Cart** button.

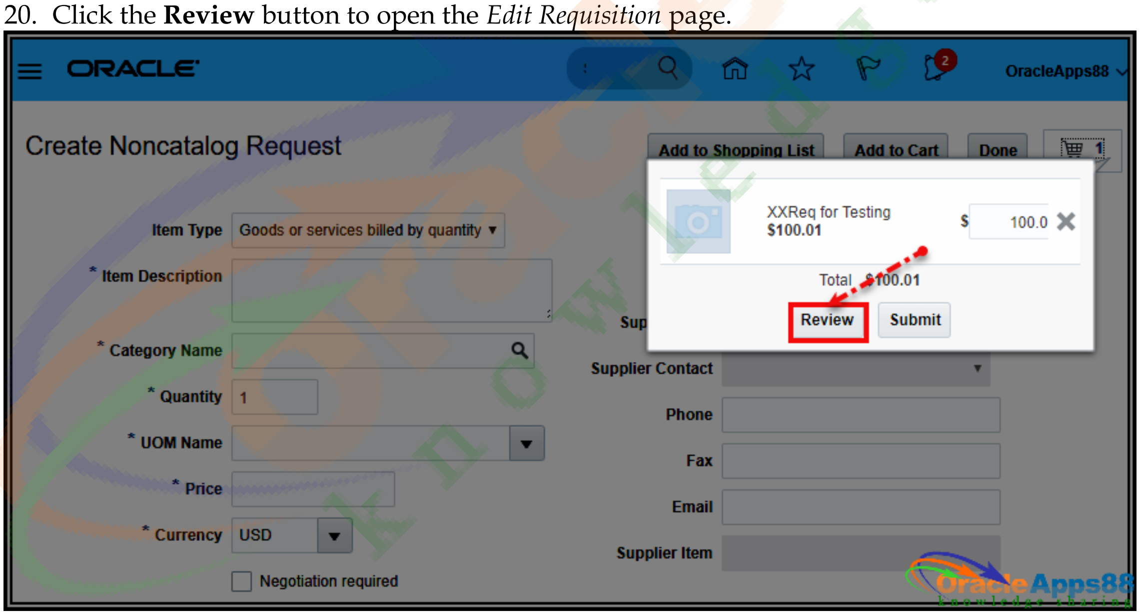


17. The line has been added to the Requisition per the pop-out note and the number reflected next to the Shopping Cart icon in the upper right corner of the page.
    i. Note: The previously populated fields in the *Create Noncatalog Request* page are now empty. Fill out the fields and click the **Add to Cart** button again to add another line to the Requisition.

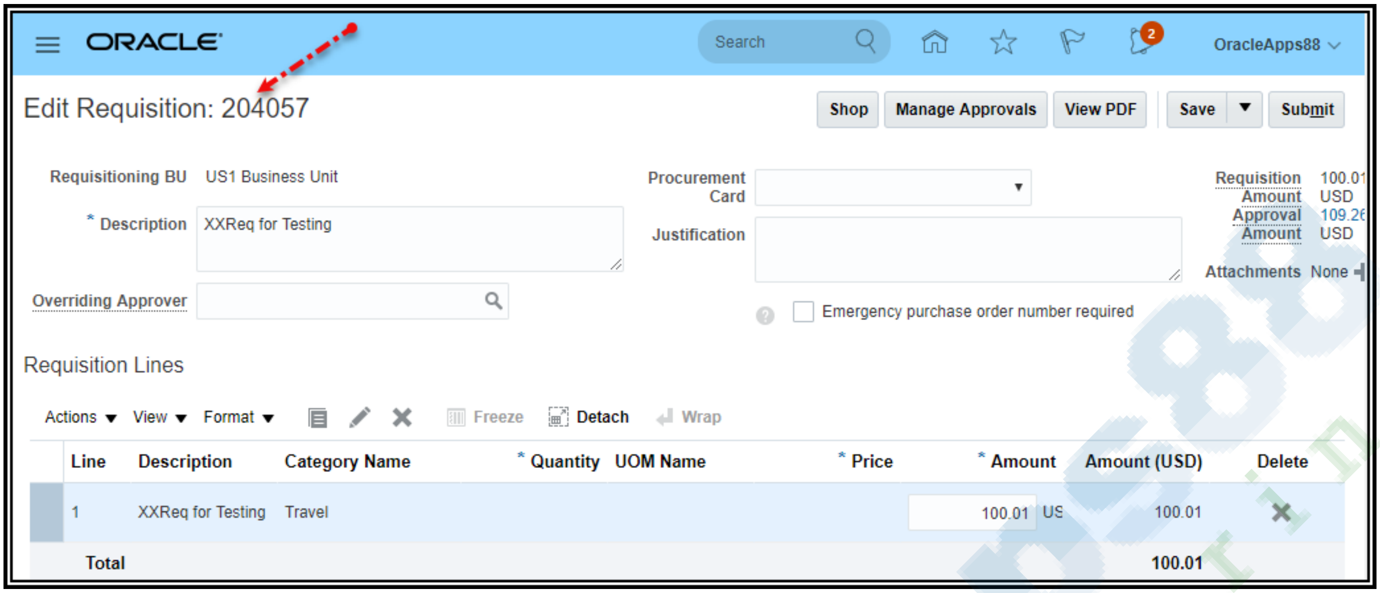
18. To proceed without adding another line at this point, click the number next to the Cart
19. Another pop-out with a Review button is displayed.



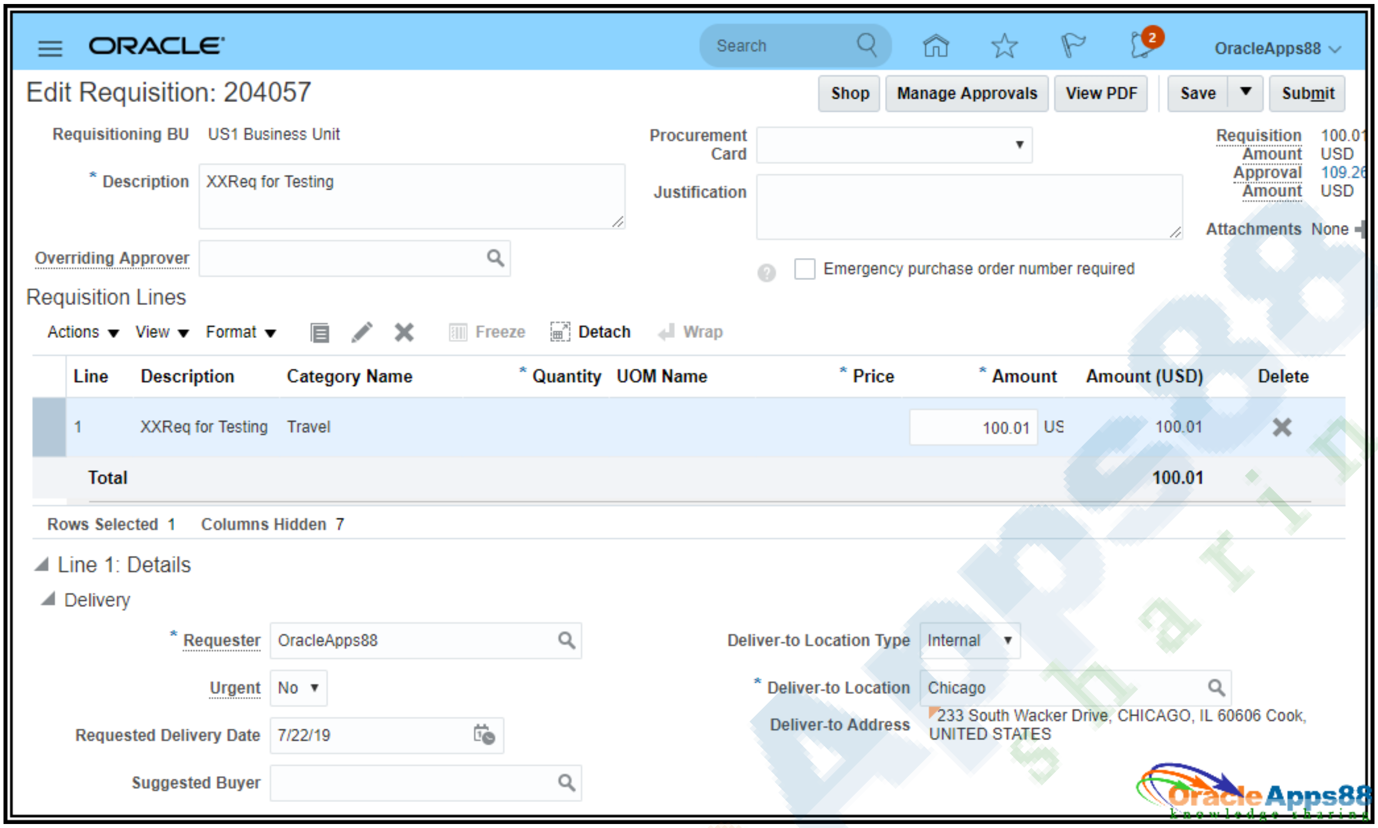
20. Click the **Review** button to open the *Edit Requisition* page.



21. On the *Edit Requisition* page, note that the Requisition Number has been auto-created.



22. Under the **Line Details > Delivery** section, the Requester field is displayed. In Oracle, there are 2 roles available to create Requisitions, one as the **Requester** and one as the **Preparer**.
    i. The **Requester** role only allows the user to create Requisitions for themselves.
    ii. The **Preparer** role allows the user to create Requisitions for themselves and on behalf of another requester.
        a. If a Requester is also a Preparer, a magnifying glass will be displayed in the Requester field. If the Requisition is being entered on behalf of someone else, clear out the current name and enter the name of the Requester (or click the magnifying glass and search for the person).
23. The **Requested Delivery Date** defaults to a week from today's date but can be changed.
24. The **Deliver-to Location** and **Deliver-to Address** are defaulted based on the Requisitioning BU associated with the **Requester**.
    i. To change the Deliver-to Location for this Requisition, click the magnifying glass and search for/select the applicable value, which will update the Deliver-to Address.


ORACLE
Search
OracleApps88
Edit Requisition: 204057
Shop
Manage Approvals
View PDF
Save
Submit
Requisitioning BU US1 Business Unit
* Description XXReq for Testing
Overriding Approver
Procurement Card
Justification
Emergency purchase order number required
Requisition Amount 100.01 USD
Approval Amount 109.26 USD
Attachments None
Requisition Lines
Actions View Format Freeze Detach Wrap
Line Description Category Name * Quantity UOM Name * Price * Amount Amount (USD) Delete
1 XXReq for Testing Travel 100.01 US 100.01
Total 100.01
Rows Selected 1 Columns Hidden 7
Line 1: Details
Delivery
* Requester OracleApps88
Urgent No
Requested Delivery Date 7/22/19
Suggested Buyer
Deliver-to Location Type Internal
* Deliver-to Location Chicago
Deliver-to Address 233 South Wacker Drive, CHICAGO, IL 60606 Cook, UNITED STATES

Adding Project Costing Details to a Requisition Line

1. In the **Line Details > Billing** section, the Charge Account generated is displayed. Oracle builds the Charge Account based on values defaulted or selected as a user creates or modifies a Requisition.
   i. Cost Center is based on the Requester's default Cost Center
   ii. Account is based on the Category selected

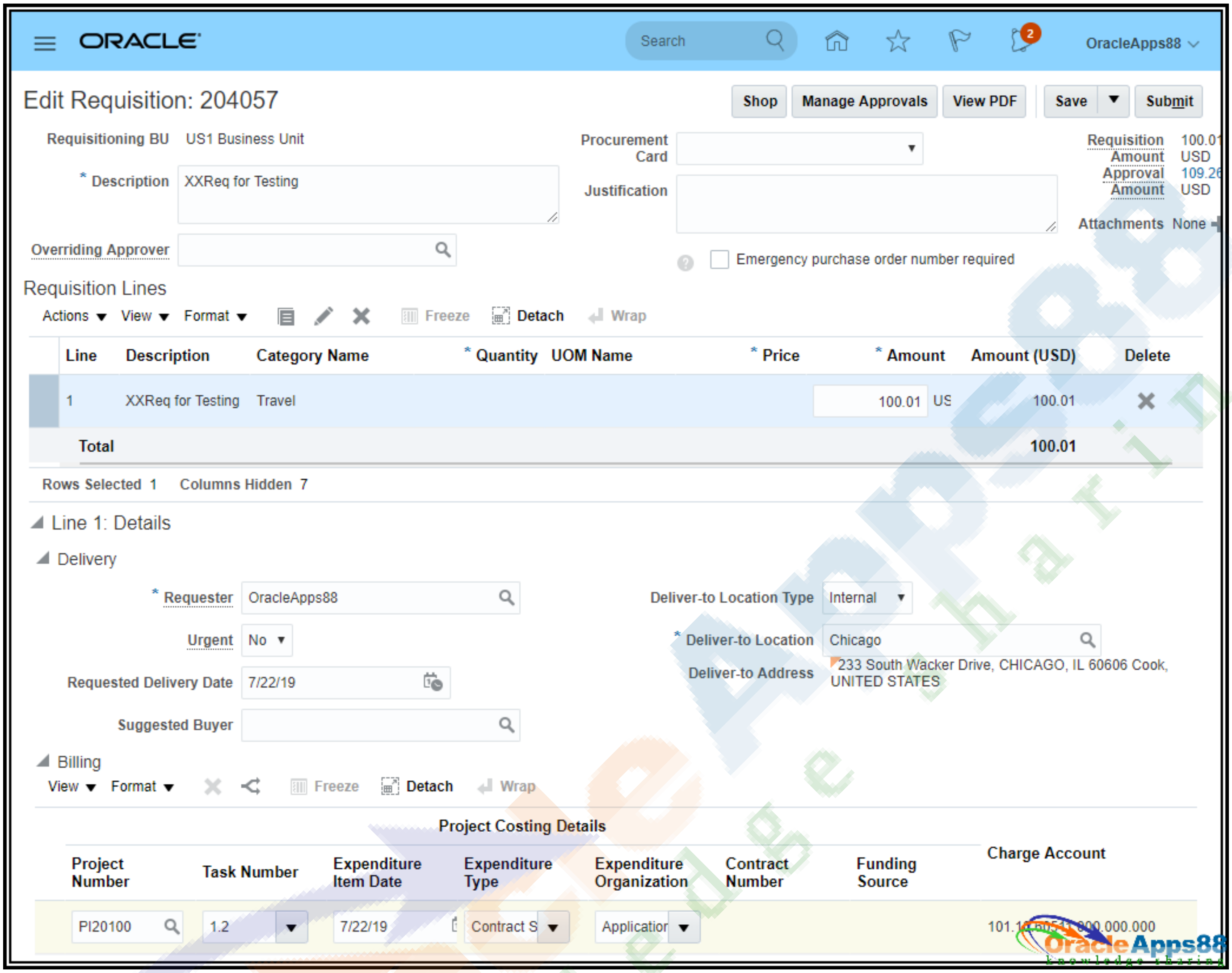
2. The **Line Details > Billing** section also includes the Project Costing Details section.
   i. Note: A Project, Task, Expenditure Item (that matches the Category) and Expenditure Org will be required to be entered for each line when entering a requisition for Project-related goods/services. Liaise with FP&A contact for assistance on which Project to use.
3. Click the magnifying glass in the **Project Number** field to search for the Project Number (alternatively, type the Project Number into the field, then hit the Tab key on the keyboard).

4. In the *Search* pop-up window, fields with a double asterisk** denote that at least one of the fields must include search criteria in order for a search to be conducted. Click the **Advanced** button.

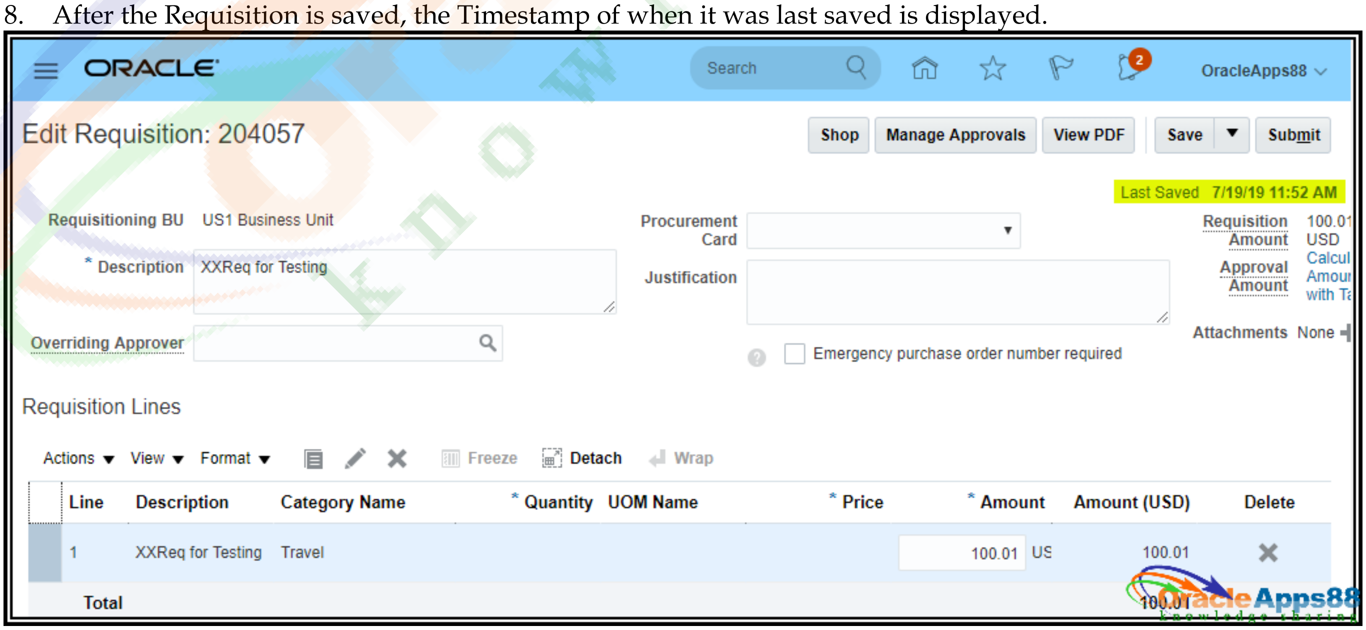
5. In the [Advanced] Search window:
   A. Select the **Description** operator of **Does <u>not</u> contain**
   B. Type any random text
   C. Click the **Search** button (All of the available values will be displayed
   D. Select the applicable value from the list by clicking the line
   E. Click the **OK** button.

6. Once the **Project Number** is populated, the other **Project Costing Details** fields become required.

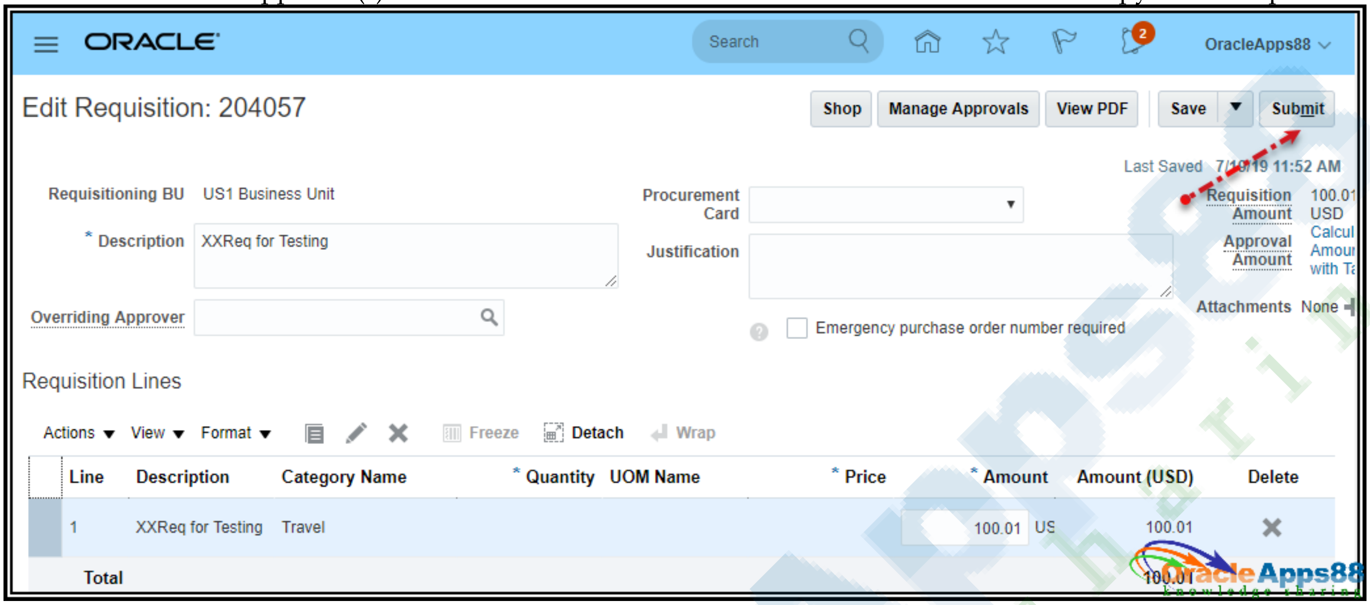
7. Populate/select the **Task Number**, **Expenditure Item Date**, **Expenditure Type** (must match the **Category**) and the **Expenditure Organization** (the Organization that will carry the cost).
   i. Note: Type the value within the applicable field or click the dropdown to view the list of values available.
   ii. After each of the **Project Costing Details** fields are populated, click the **Save** button in the top right of the page.



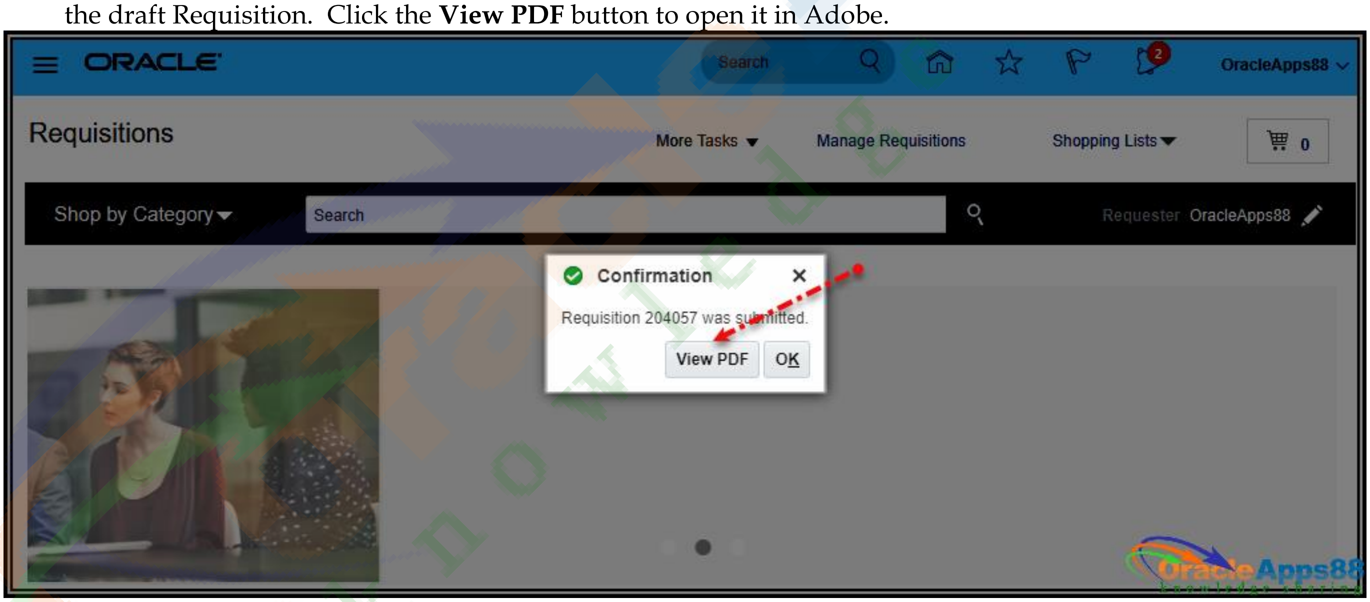
8. After the Requisition is saved, the Timestamp of when it was last saved is displayed.



9. If the Requisition is ready, click the **Submit** button. It will be sent for approval based on the budget and HR hierarchy of the Requisition Requester.
   i. The approver(s) will receive an email and an Oracle notification with a PDF copy of the Requisition.



10. Once the Requisition has been submitted, a *Confirmation* pop-up is displayed with the option to view the PDF of the draft Requisition. Click the **View PDF** button to open it in Adobe.



11. Select (A) **Open with** (Adobe…) and (B) click the **OK** button to view the PDF.

12. The draft PDF of the Requisition is displayed. Close the PDF and return to Oracle.

ORACLE

Requisition 204057 (100.01 USD)

Report Date 7/19/19 12:43 PM GMT+00:00
Page 1 of 1

Requisitioning BU	US1 Business Unit	**Requisition Amount**	100.01 USD
Entered By	OracleApps88	**Approval Amount**	109.26 USD
Status	Approved	**Procurement Card**	
Description	XXReq for Testing	**Justification**	

Lines

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status
1		XXReq for Testing	Travel			USD	100.01	Approved

Requester	OracleApps88	**Supplier**	OracleApps88
Urgent	No	**New Supplier**	No
Requested Delivery Date	7/22/19	**Supplier Site**	REMIT TO
Deliver-to Location Type	Internal	**Supplier Contact**	Apps Oracle
Deliver-to Location	Chicago	**Contact Phone**	+91 9059574321
Deliver-to Address	233 South Wacker Drive, Chicago, IL 60606, Cook, United States	**Supplier Item**	
Destination Type	Expense	**Note to Supplier**	
Subinventory		**Note to Receiver**	
Note to Buyer			

Attachments

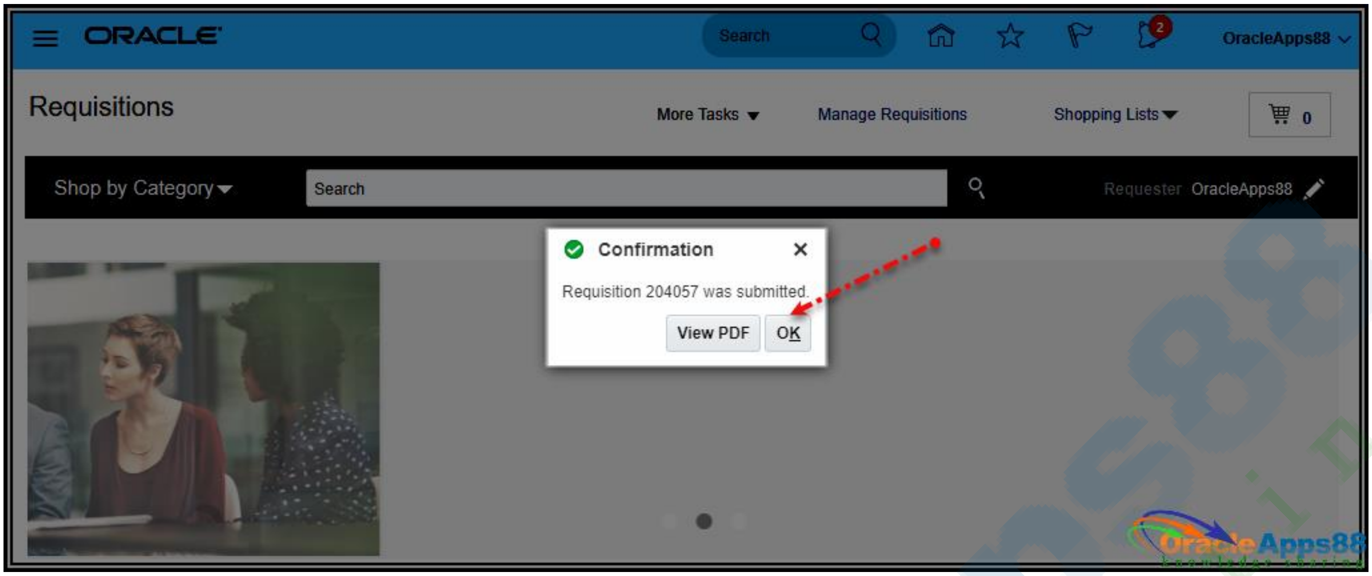
Title	File Name or URL	Description
OracleApps88	http://OracleApps88.Blogspot.com/	Oracle Applications

Distributions

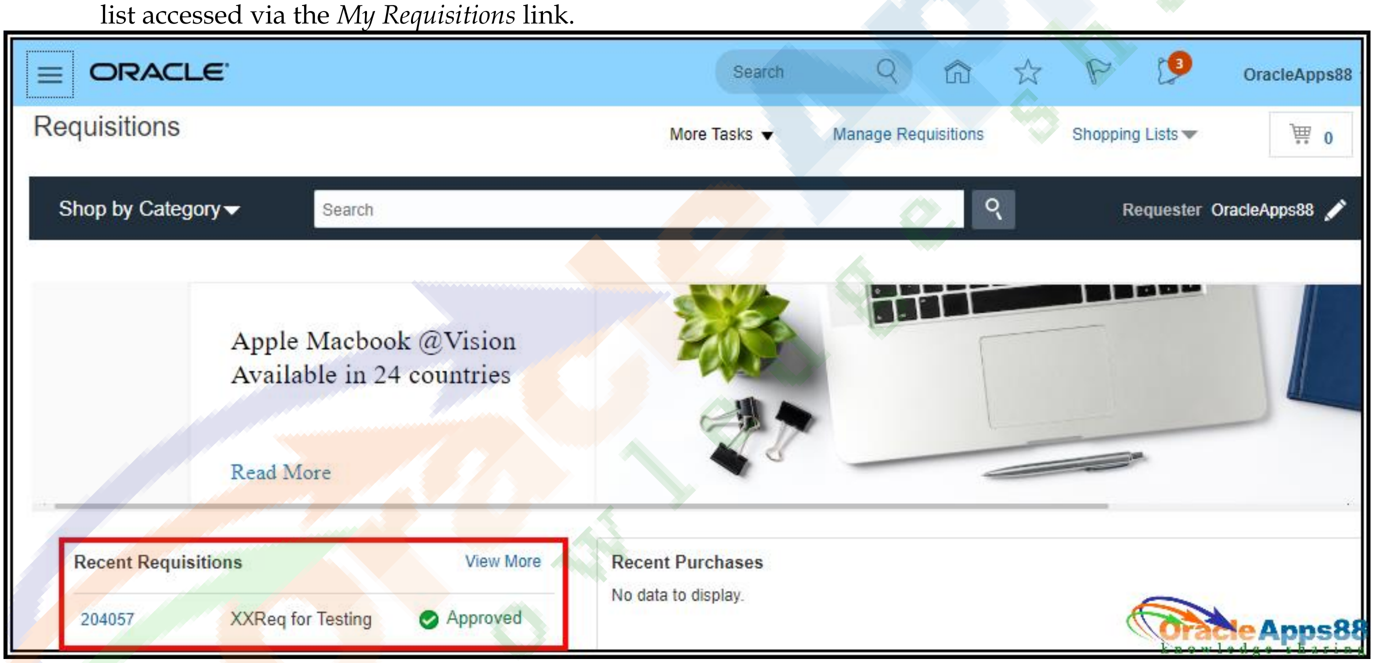
Distribution	Charge Account	Percentage	Quantity	Amount (USD)
1	101.10.60511.000.000.00 0	100	0	100.01

End of Report

13. Back in Oracle, click the **OK** button to close the *Confirmation* pop-up.



14. The Requisition will be displayed under both the **Recent Requisitions** list and on the expanded Requisitions list accessed via the *My Requisitions* link.



15. Under the **Recent Requisitions**, click the hyperlink for the Requisition to open it to view where the Requisition is in the approval process.

16. On the *Requisition* page, click the [Pending Approval] hyperlink next to **Status**.

17. The Approvals **Action Detail** page is displayed for the Requisition.
    i. This page displays where a Requisition is in the approval process.
        a. If the Requisition has been approved, there is a check mark to the left of the person icon and the user's name (in this example, there are check marks to the left of the people icon and Applications Developer).
        b. The next approver has an empty blue box to the left of the person icon and his / her name.

ii. Notes:

a. Due to the dollar value (under $1,000) this Requisition does not require Budget/Cost Center or HR Hierarchy approval, therefore it has been auto-approved by the system (Applications Developer) to this point.

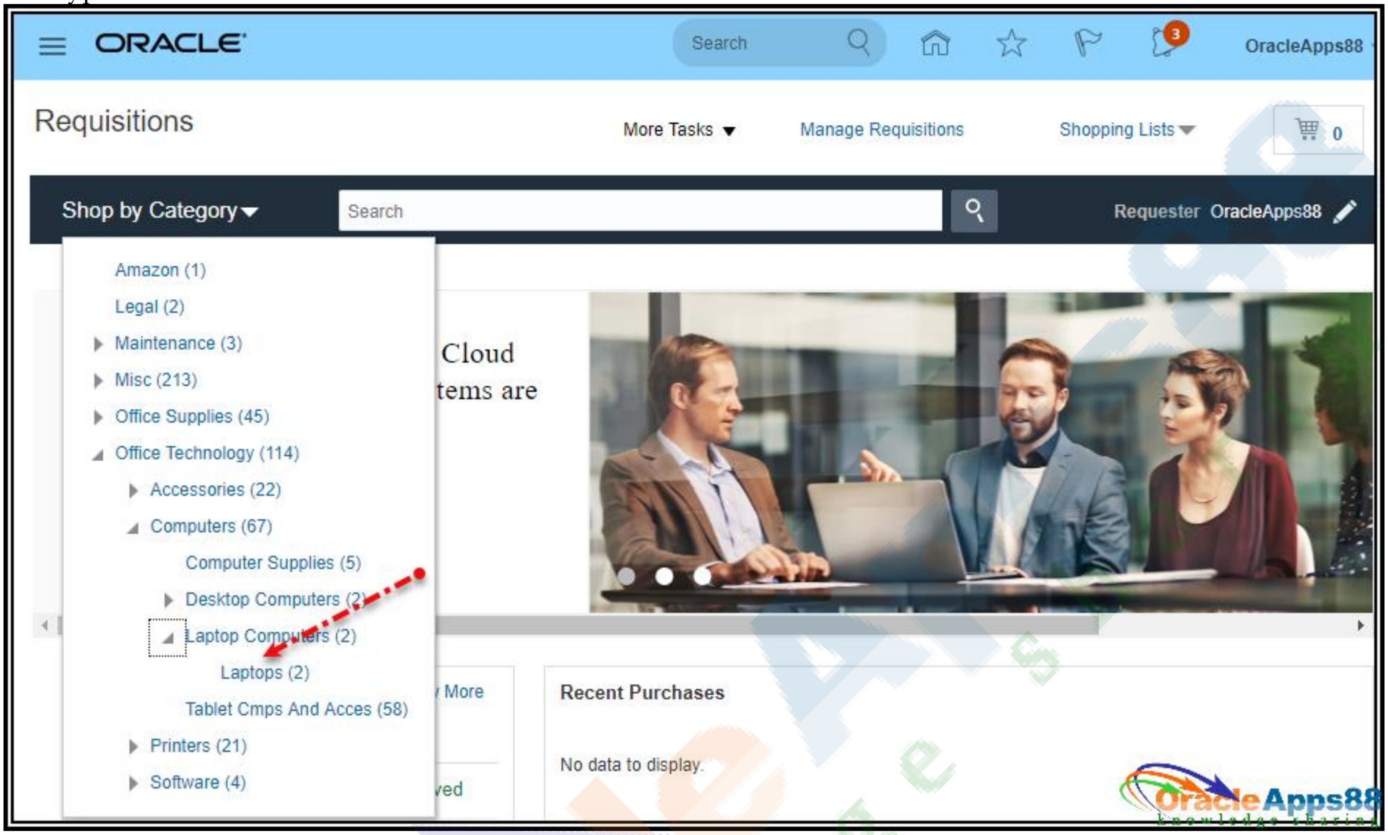
b. The last "approver" is the Buyer Group who provides final review/approval prior to converting the Requisition to a Purchase Order.

1. Only one person from this group needs to approve the Requisition.

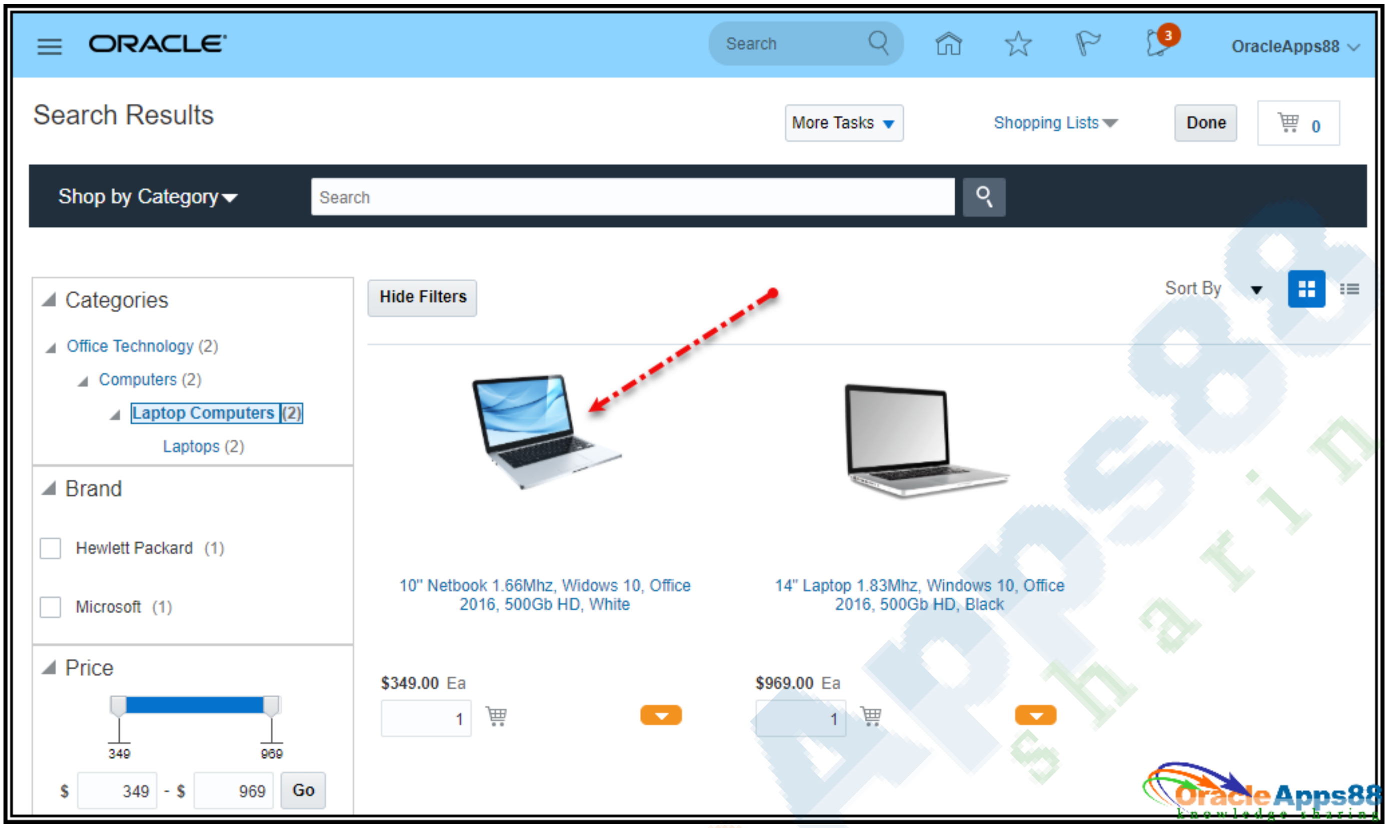
18. Click the **Done** button to close this window.

Creating a Requisition from an Online Catalog

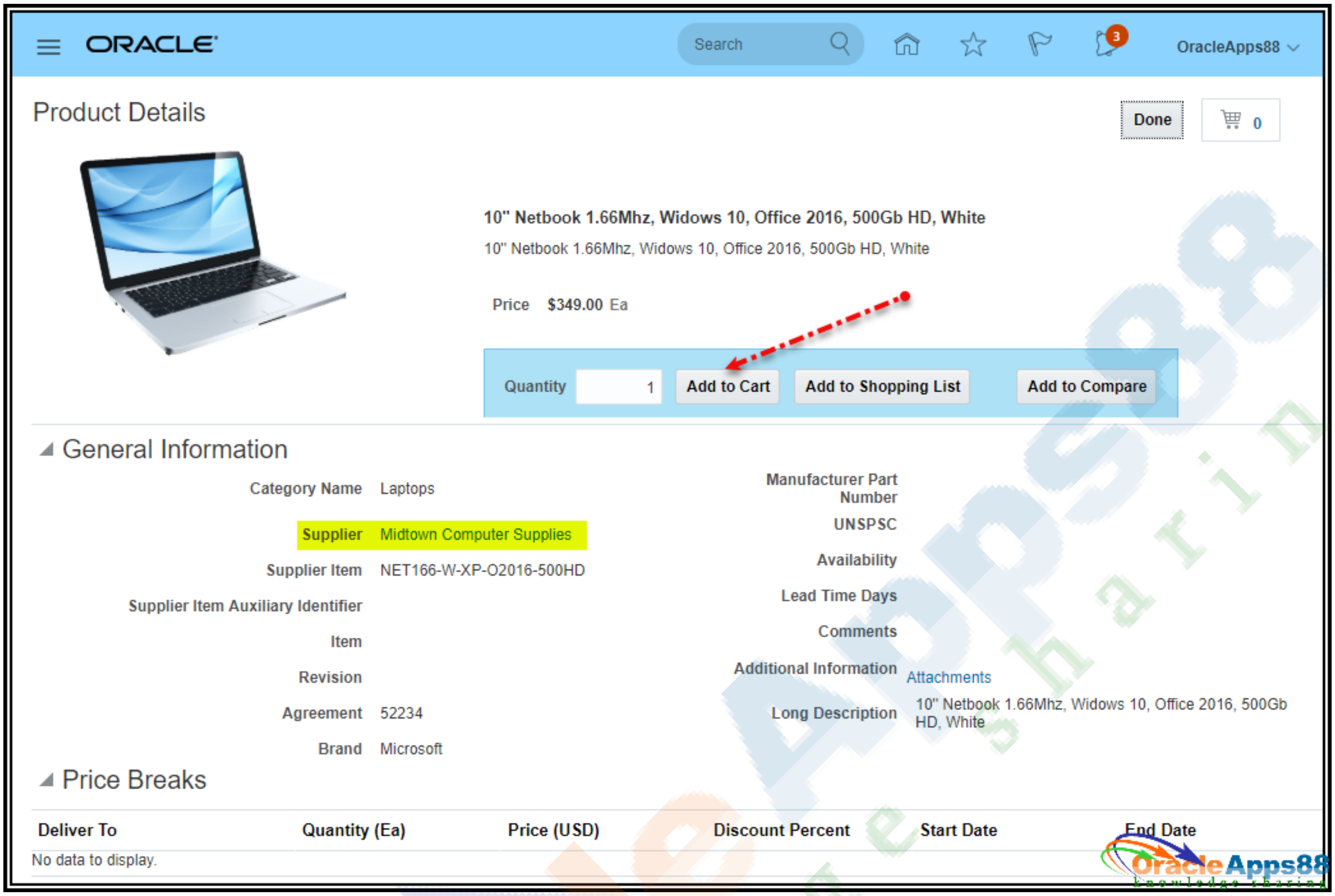
1. From the *Requisitions* page, (A) click the **Shop by Category** dropdown and (B) select the applicable Supplier catalog hyperlink from the list.



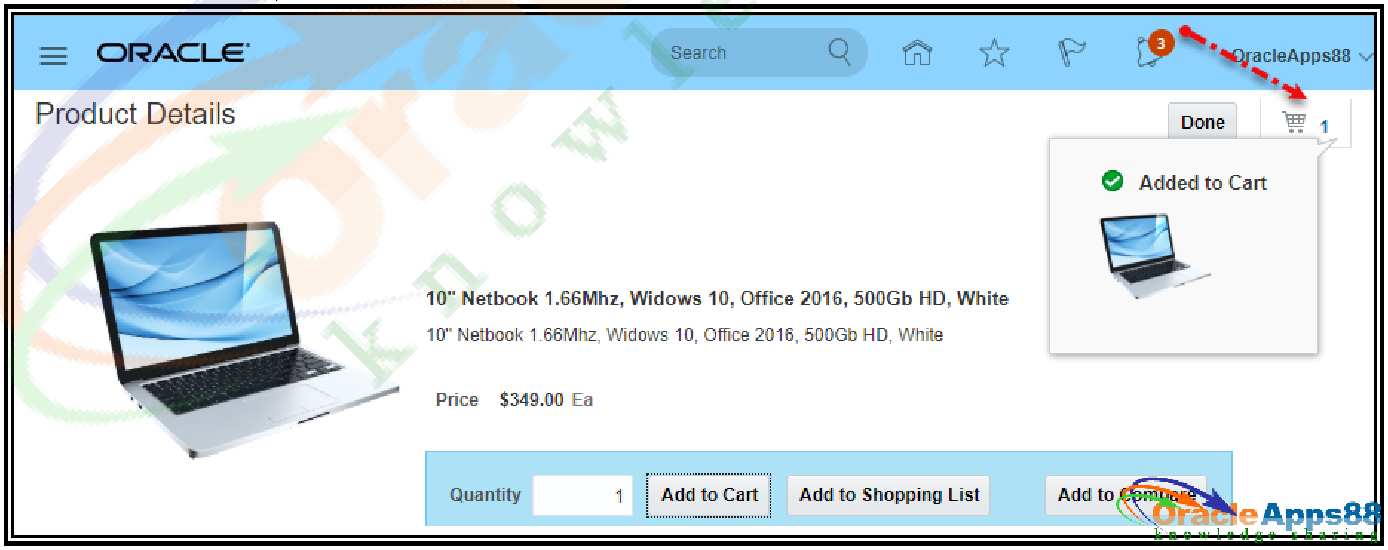
2. The Supplier site is now opened. **Search** for the item and click on the item



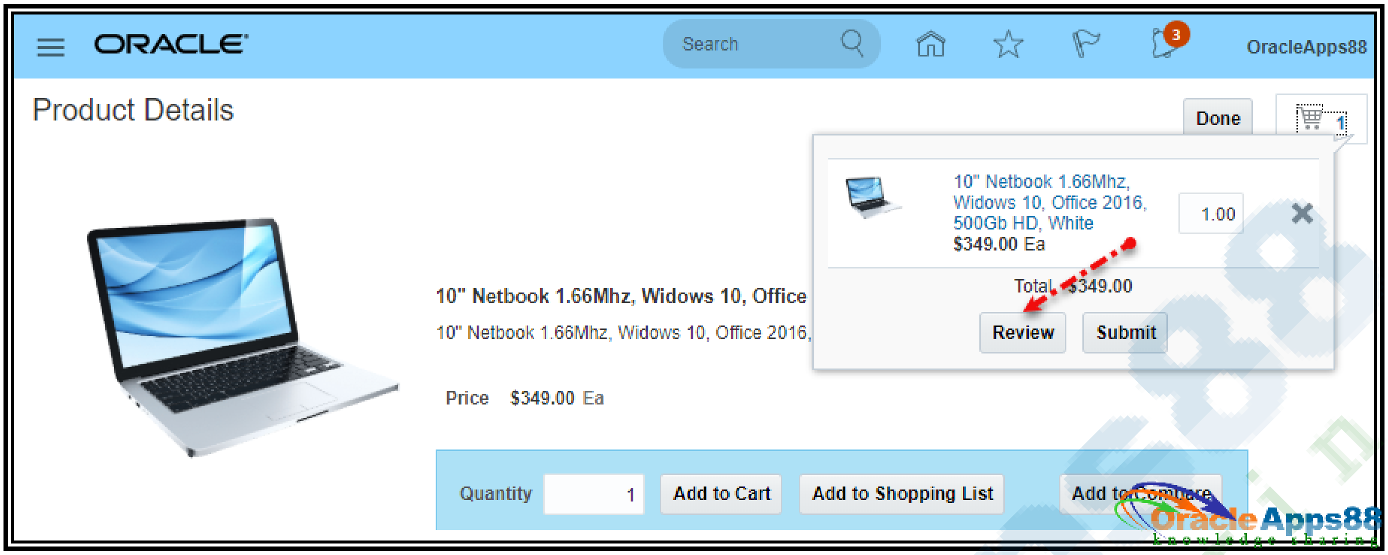
3. Enter the Quantity and **add to the cart** like you would normally do.



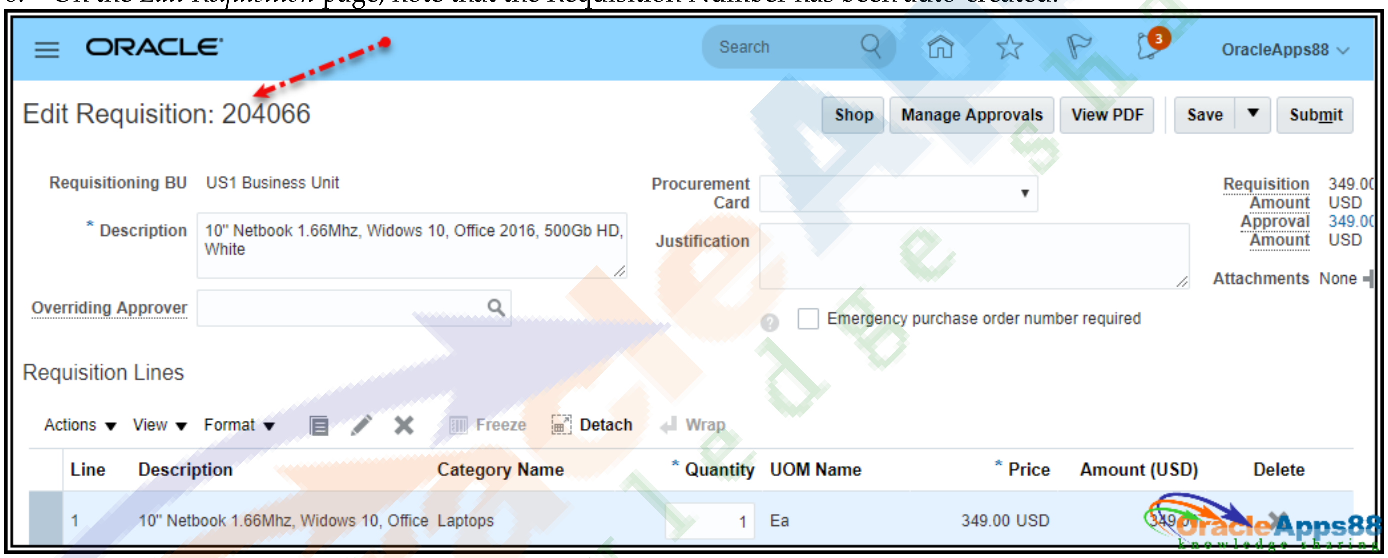
4. Item added to Cart, click the **View Cart**  button.



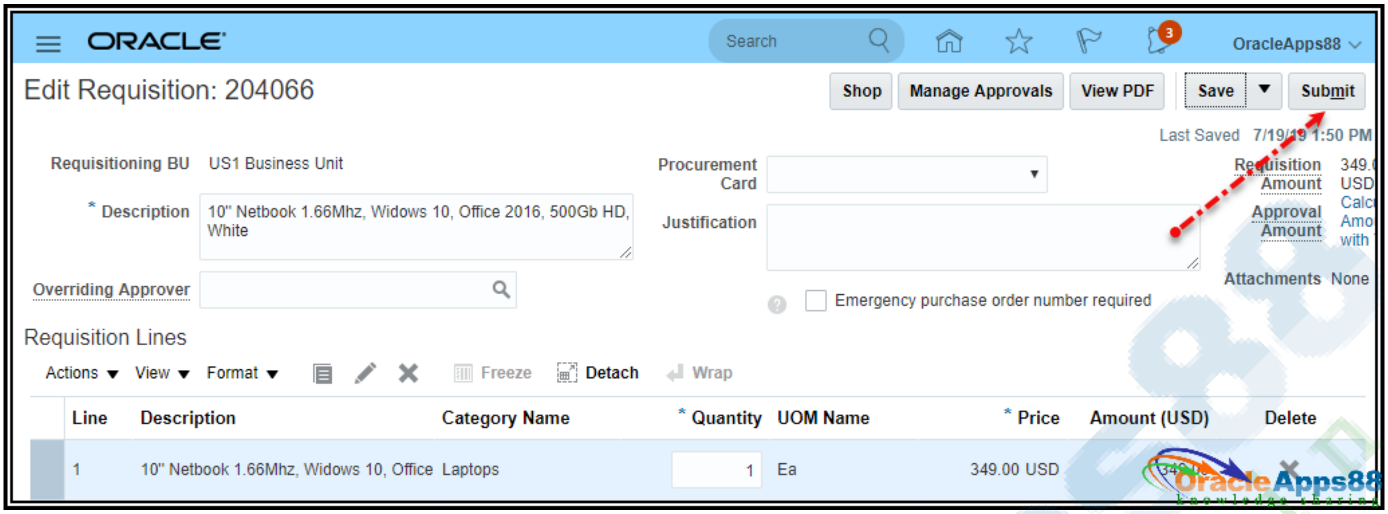
5. Click the **Review** button to open the *Edit Requisition* page.



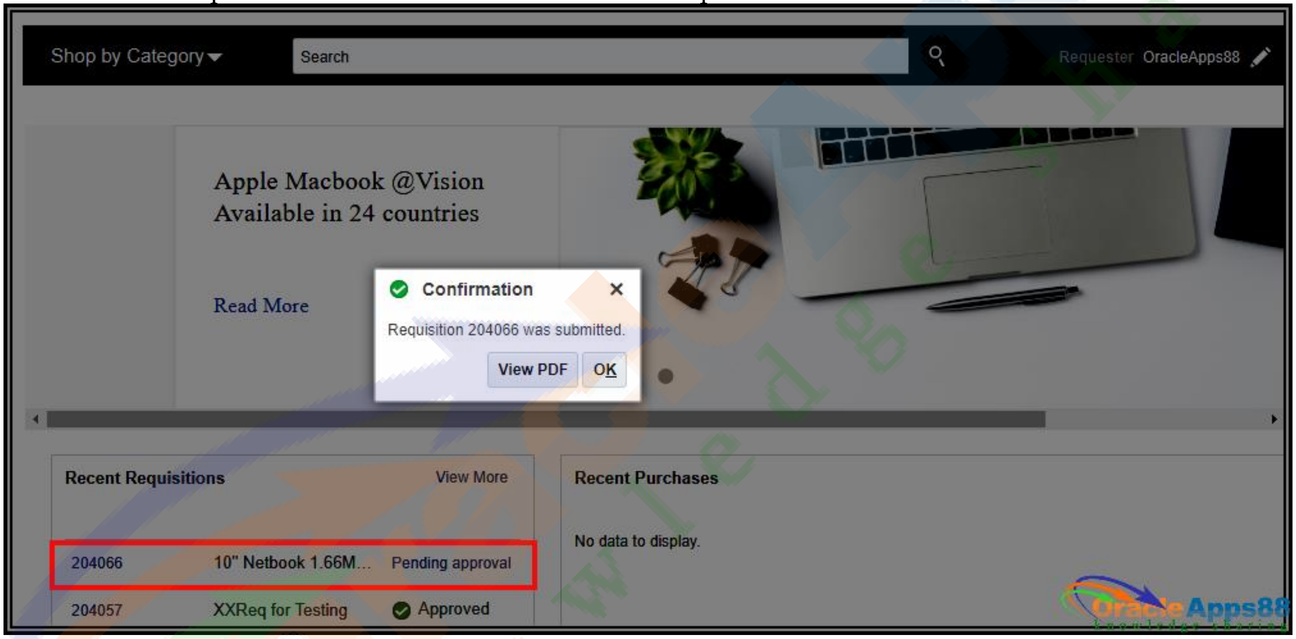
6. On the *Edit Requisition* page, note that the Requisition Number has been auto-created.



8. Verify the requisition details and Click on the Save and Submit button, It will be sent for approval based on the budget and HR hierarchy of the Requisition Requester.
    a. The approver(s) will receive an email and an Oracle notification with a PDF copy of the Requisition.



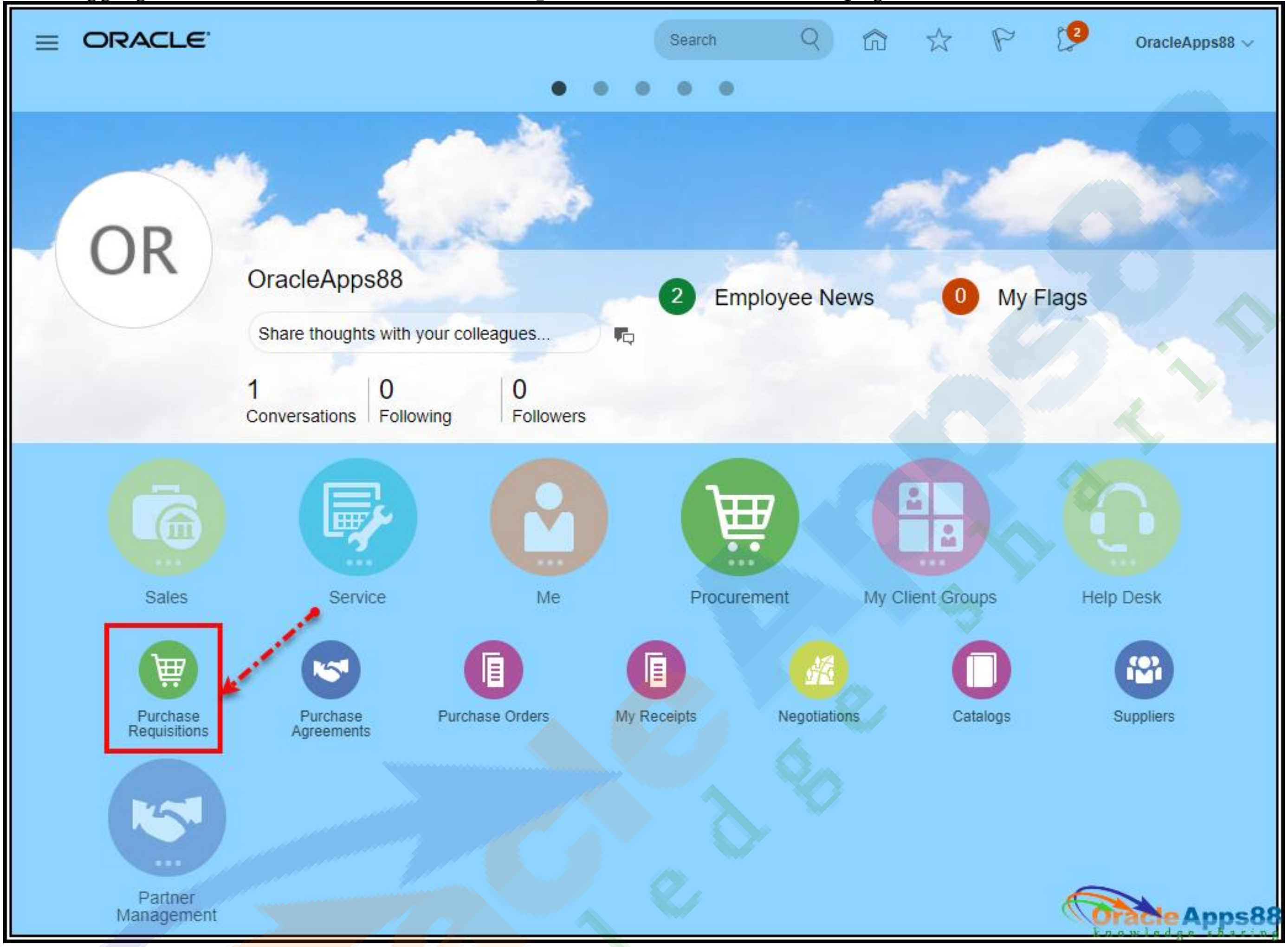
9. Once the Requisition has been submitted, a *Confirmation* pop-up is displayed with the option to view the PDF of the draft Requisition. Click the **View PDF** button to open it in Adobe.



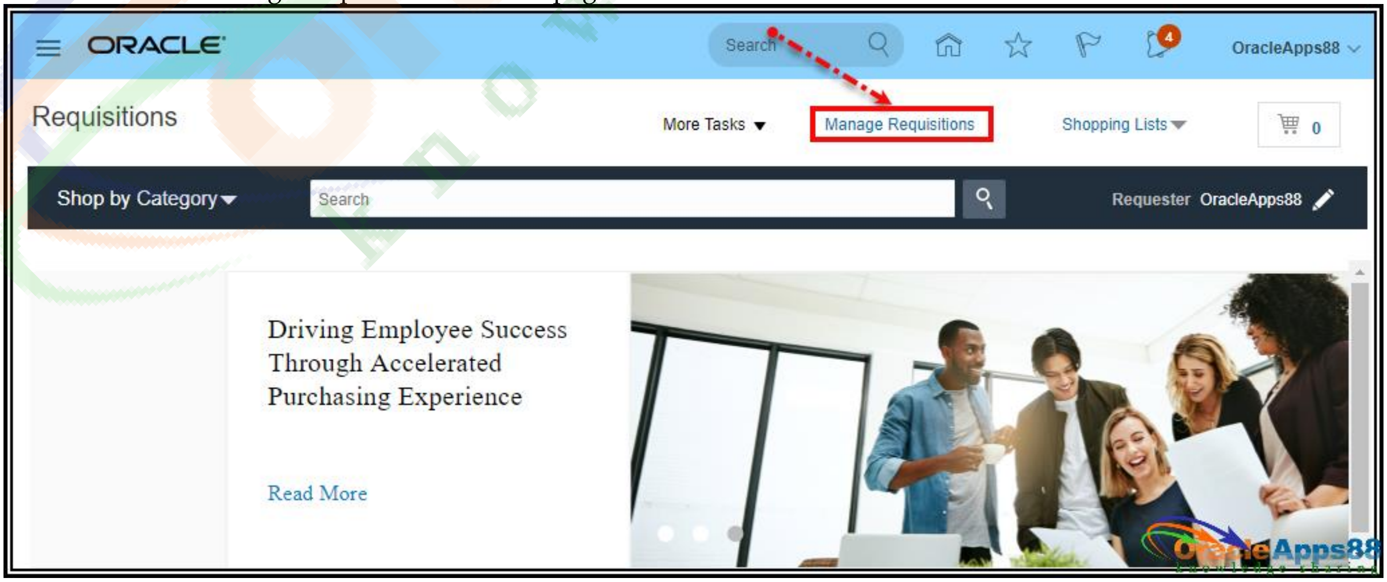
Copying a Requisition to Create a New Requisition

To save time with data entry, copy a previously submitted Requisition to create a new Requisition.

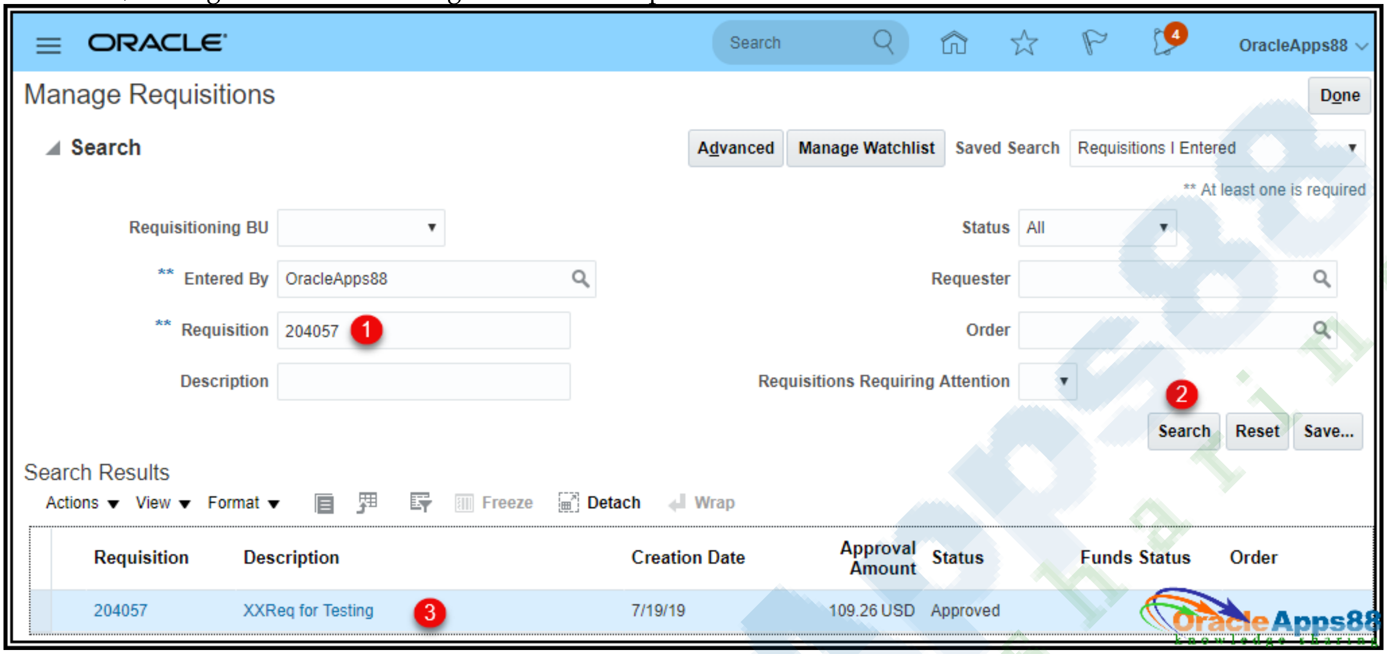
1. Logging in to Oracle, click the **Purchase Requisitions** icon on the Homepage.



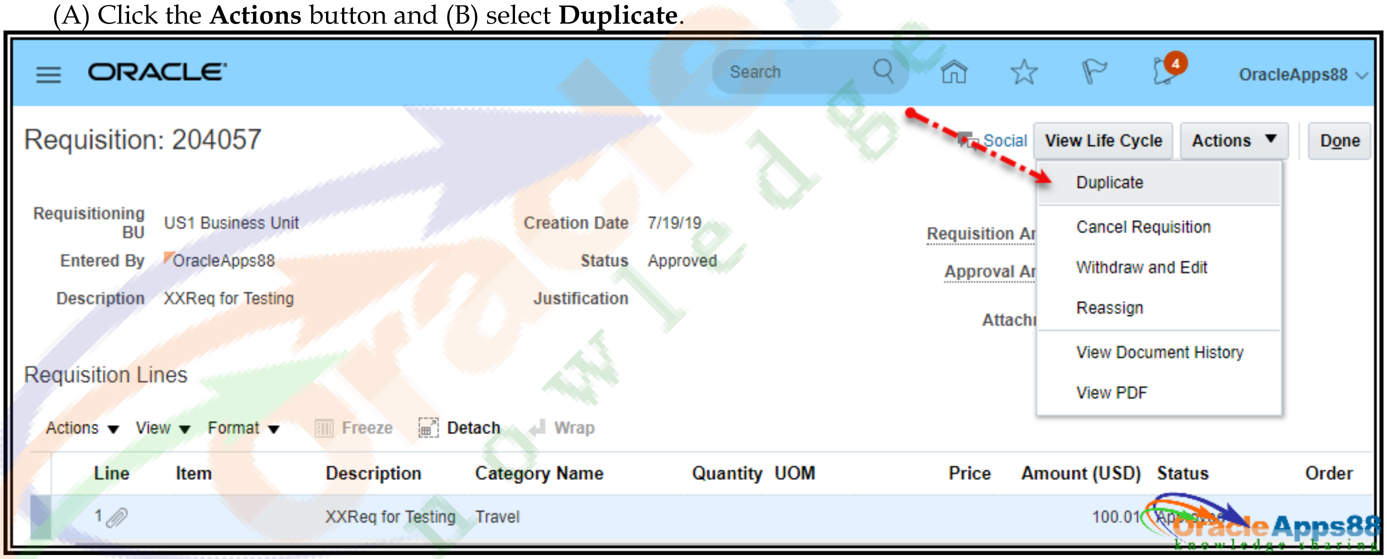
2. Click on the Manage Requisition on home page



3. Locate the Requisition and open it. Note: The Requisition can be in any Submitted Status, including Canceled Status, as long as there are existing lines on the Requisition.



4. On the *Requisition* page for the existing Requisition (in this example, a Canceled Requisition) that is to be copied, (A) Click the **Actions** button and (B) select **Duplicate**.

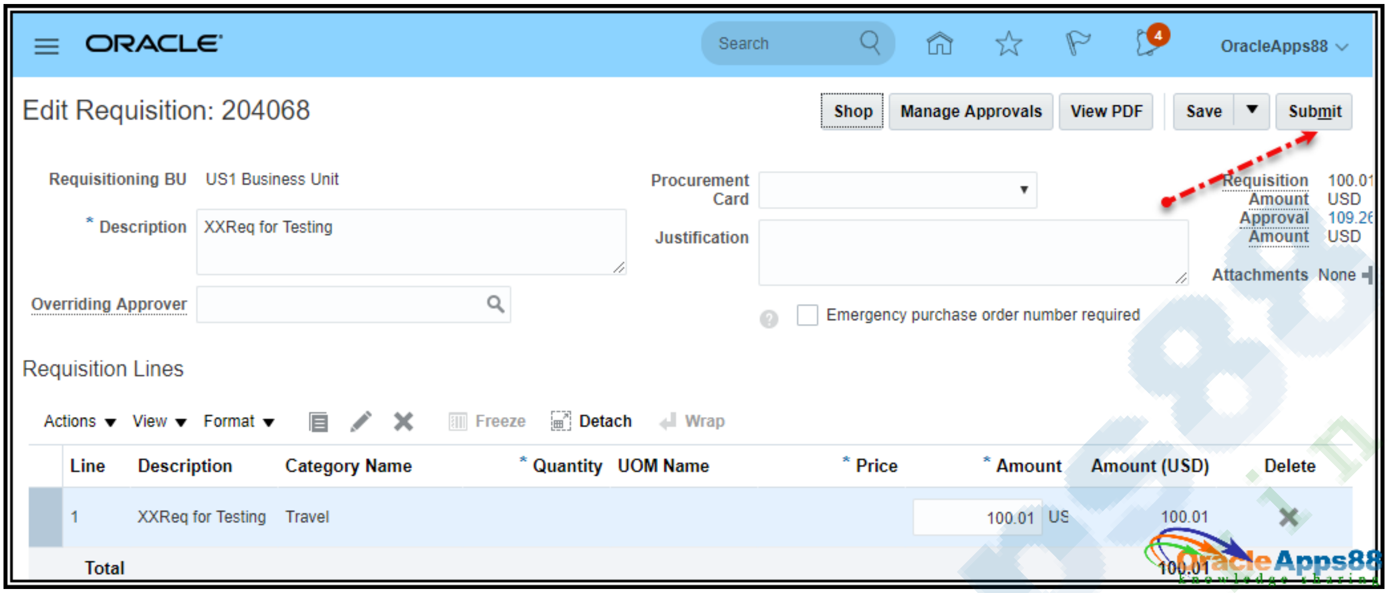


5. The *Edit Requisition* page is displayed for the newly created Requisition. A new Requisition number has been assigned along with a default Requested Delivery date equal to one week from today's date. All other fields match the original Requisition.

a. To edit the new Requisition Line(s), highlight the applicable line (Line 1 or Line 2) and click the pencil icon).

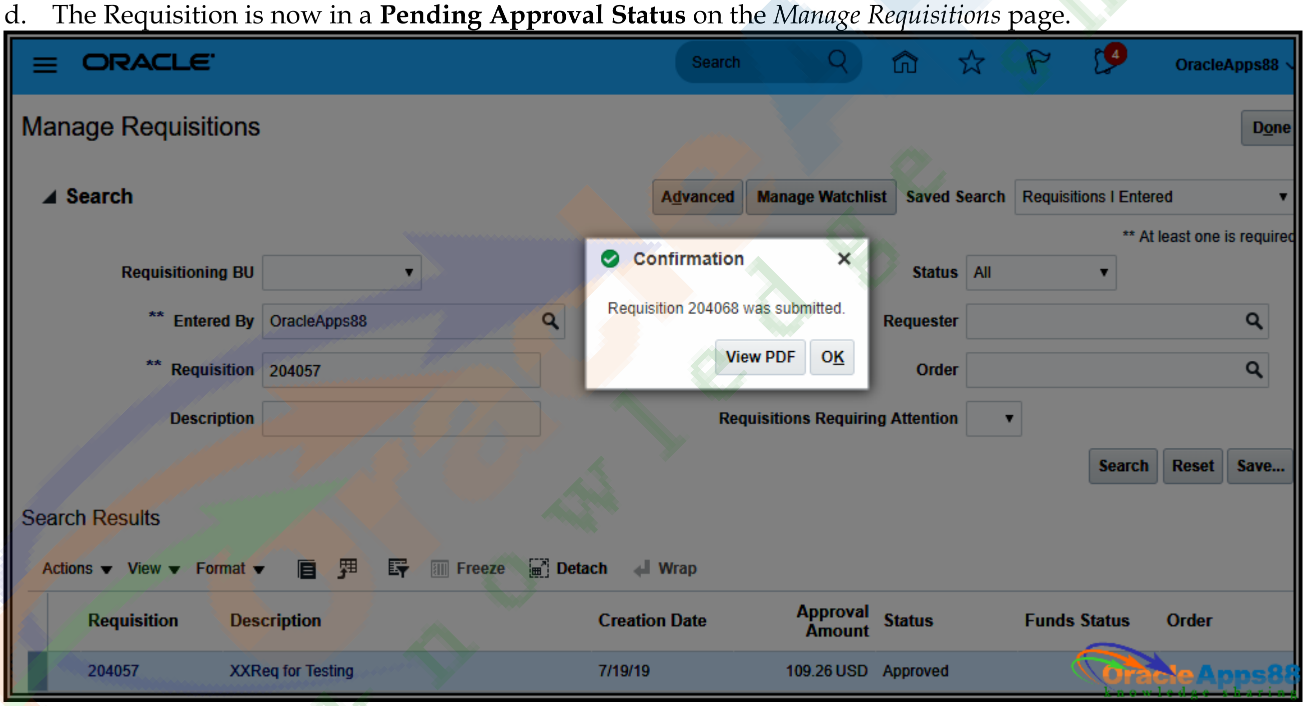
b. Click the **Save** icon after making any changes.

c. After all applicable changes have been saved, click the **Submit** button.



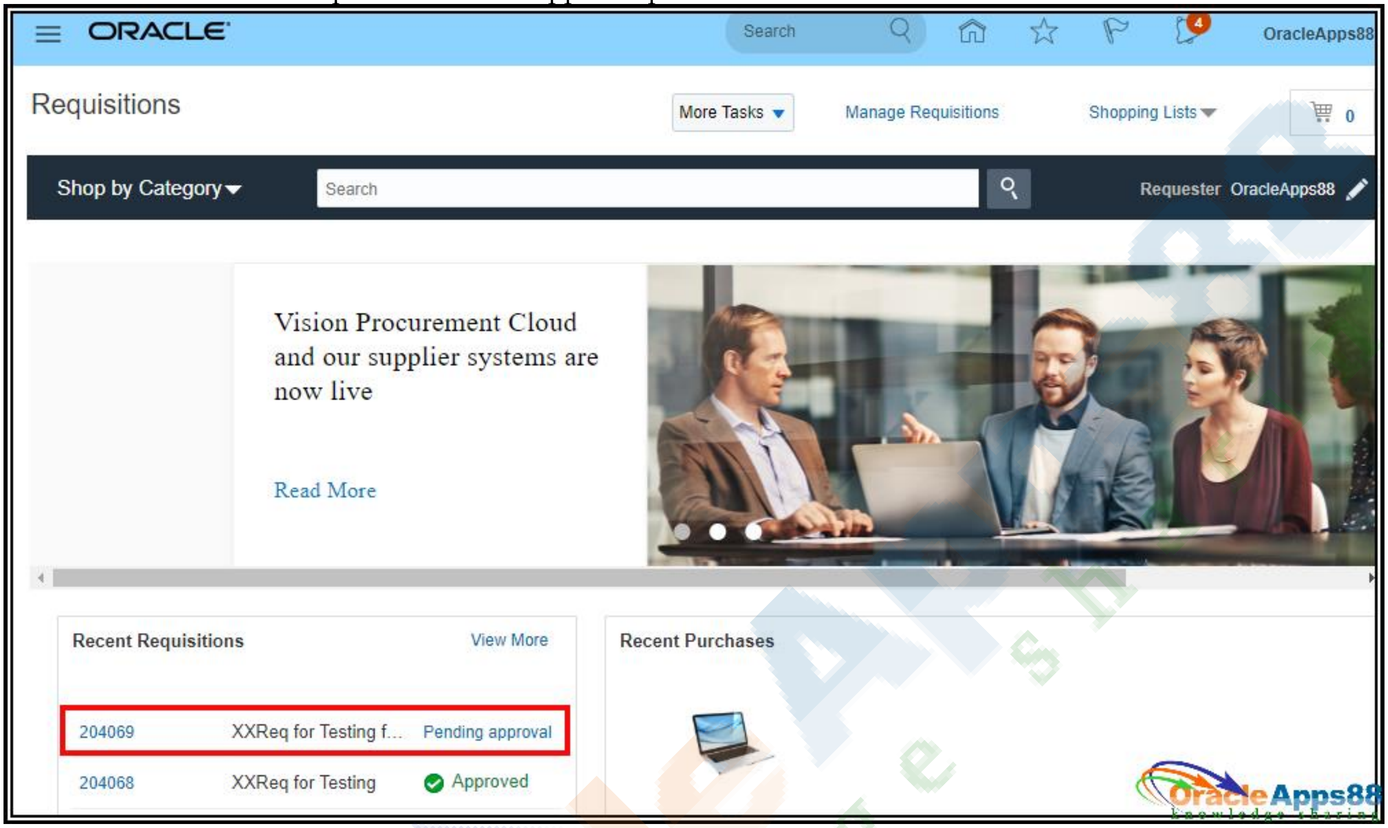
6. Once the Requisition has been submitted, the *Confirmation* pop-up is displayed. View the draft PDF, if applicable. Click the **OK** button to close the pop-up.

d. The Requisition is now in a **Pending Approval Status** on the *Manage Requisitions* page.

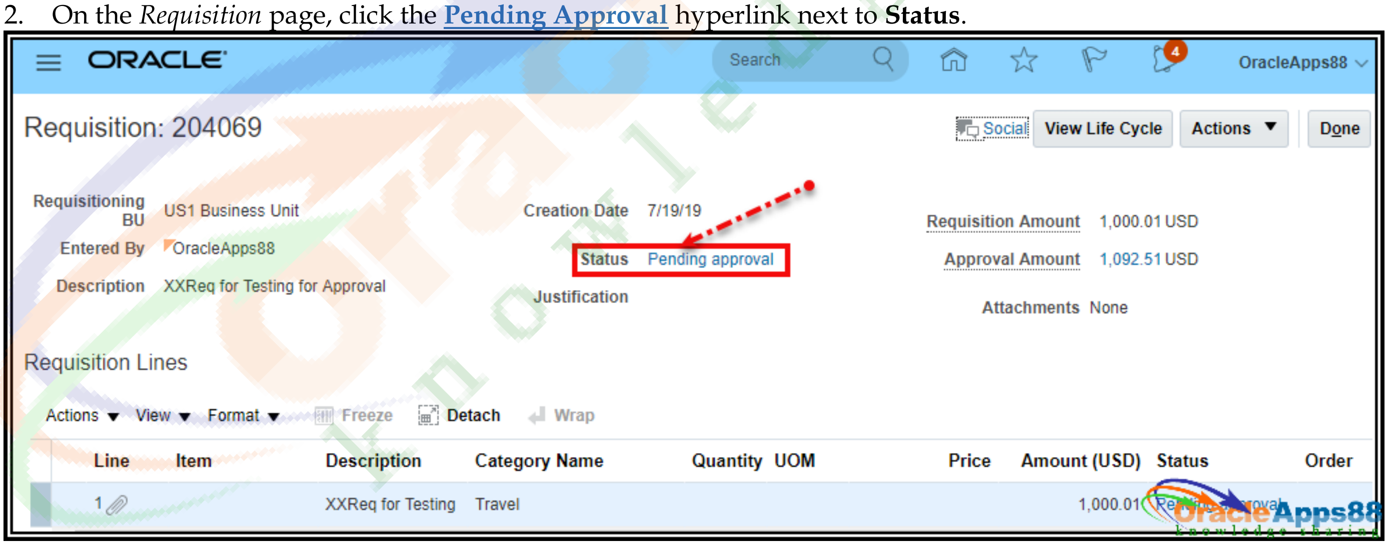


Viewing Where a Requisition is in the Approvals Process

1. Under the **Recent Requisitions** (or via the Manage Requisitions link), click the hyperlink for the Requisition to open it to view where the Requisition is in the approval process.



2. On the *Requisition* page, click the Pending Approval hyperlink next to **Status**.



3. The Approvals **Action Detail** page is displayed for the Requisition.
   i. This page displays where a Requisition is in the approval process.
      a. If the Requisition has been approved, there is a check mark to the left of the person icon and the user's name (in this example, there are check marks to the left of the people icon and Applications Developer).
      b. The next approver has an empty blue box to the left of the person icon and his / her name.

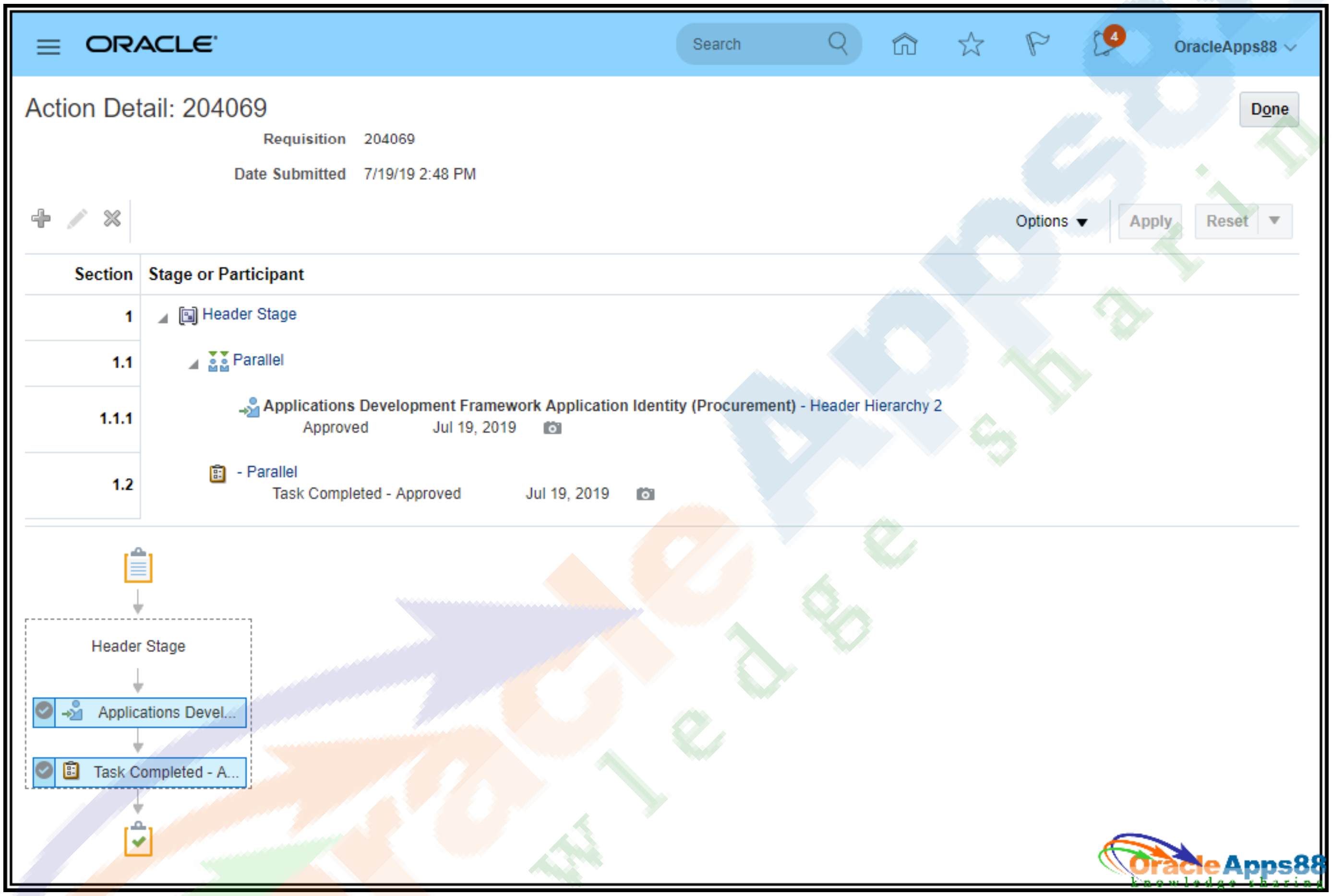
ii. Notes:

a. Due to the dollar value (under $1,000) this Requisition does not require Budget/Cost Center or HR Hierarchy approval, therefore it has been auto-approved by the system (Applications Developer) to this point.

b. The last "approver" is the Buyer Group who provides final review/approval prior to converting the Requisition to a Purchase Order.

1. Only one person from the Buyer Group needs to approve the Requisition.

4. Click the **Done** button to close this window.



Approving or Rejecting a Requisition

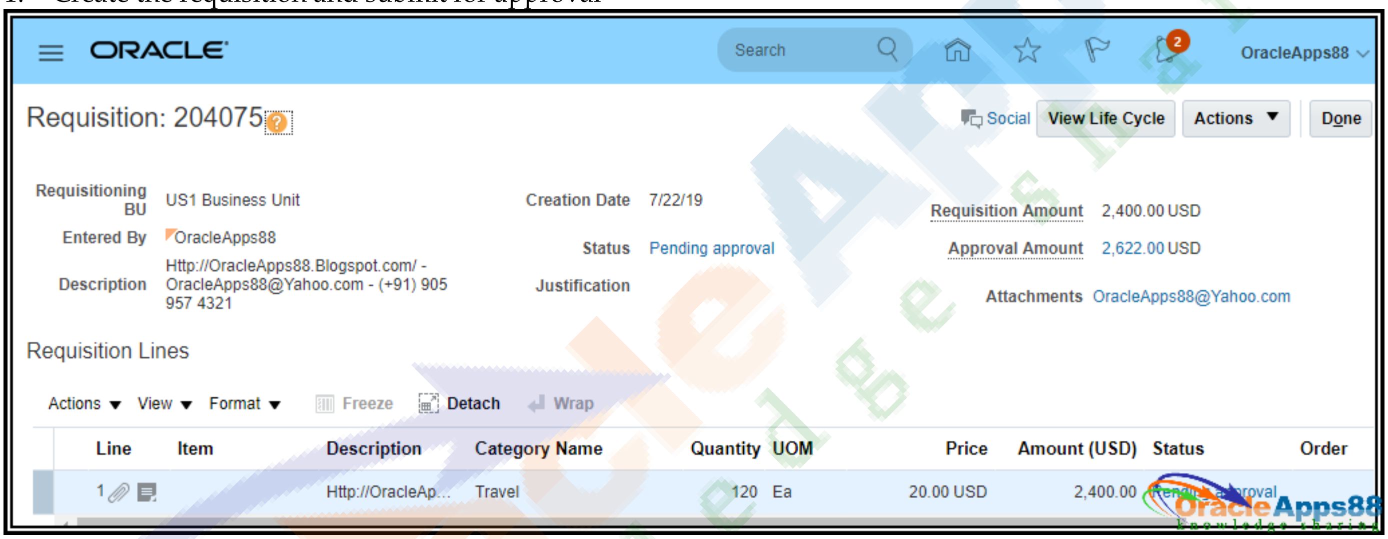
There are two methods for approving or rejecting a Requisition:

1. Via Email
2. Within Oracle via Workflow Notifications
   a. Note: Each approver only needs to approve or reject the Requisition via one method.

Approving a Requisition via Email

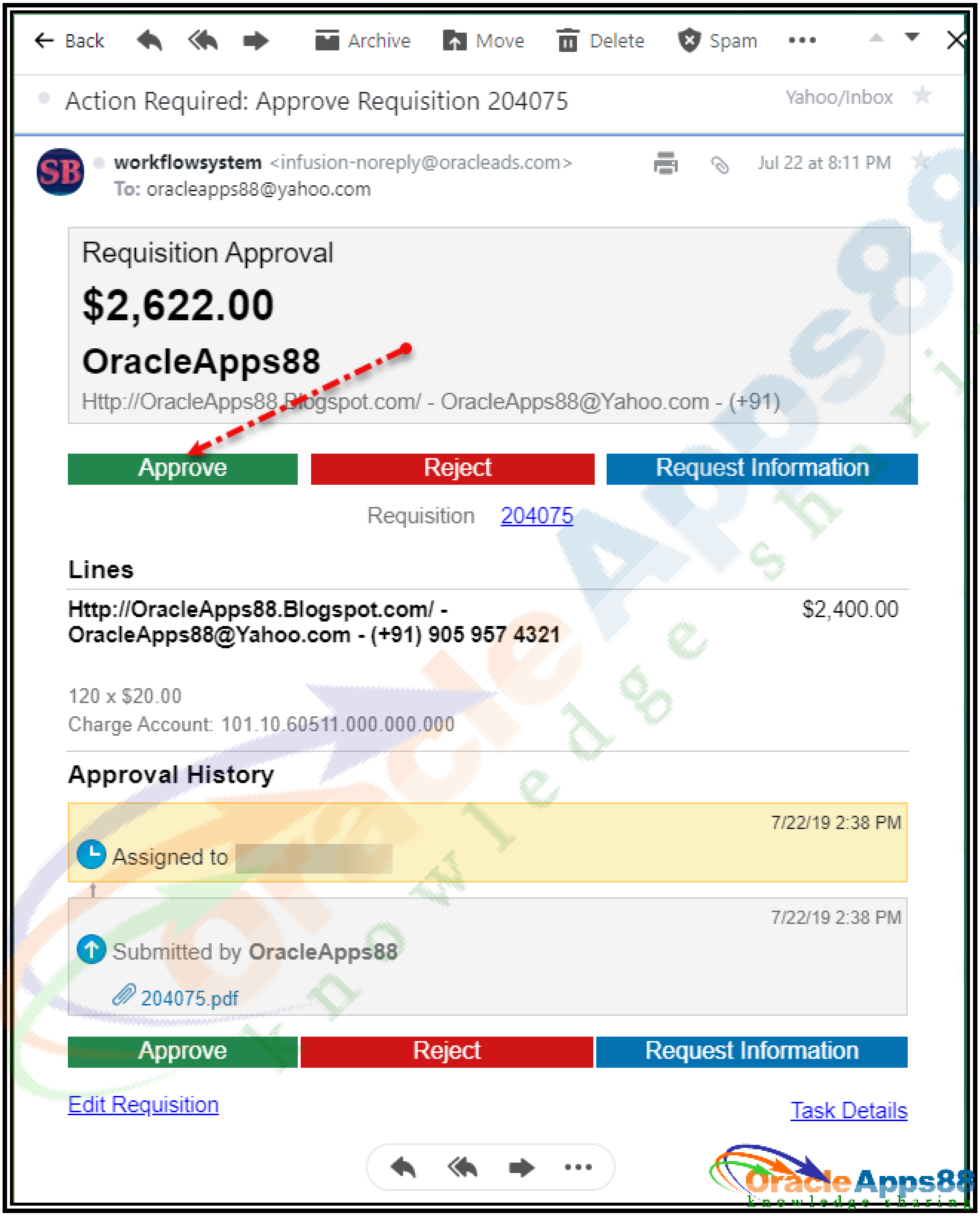
- The approver will receive an Email Notification indicating "Action Required".
- The Email Notification will contain the following:
  - The Header will include the Action Required and Requisition Number
  - The Body of the Email will include the specific details of the Requisition, including the Approval Amount, Requester, Category Name, Cost Center, etc. In addition, it will include a PDF attachment of the draft Requisition plus a link to the Requisition within Oracle.
  - The Body will also include the Action History, Future Approvers and the "actionable" Approve and Reject buttons.

1. Create the requisition and submit for approval



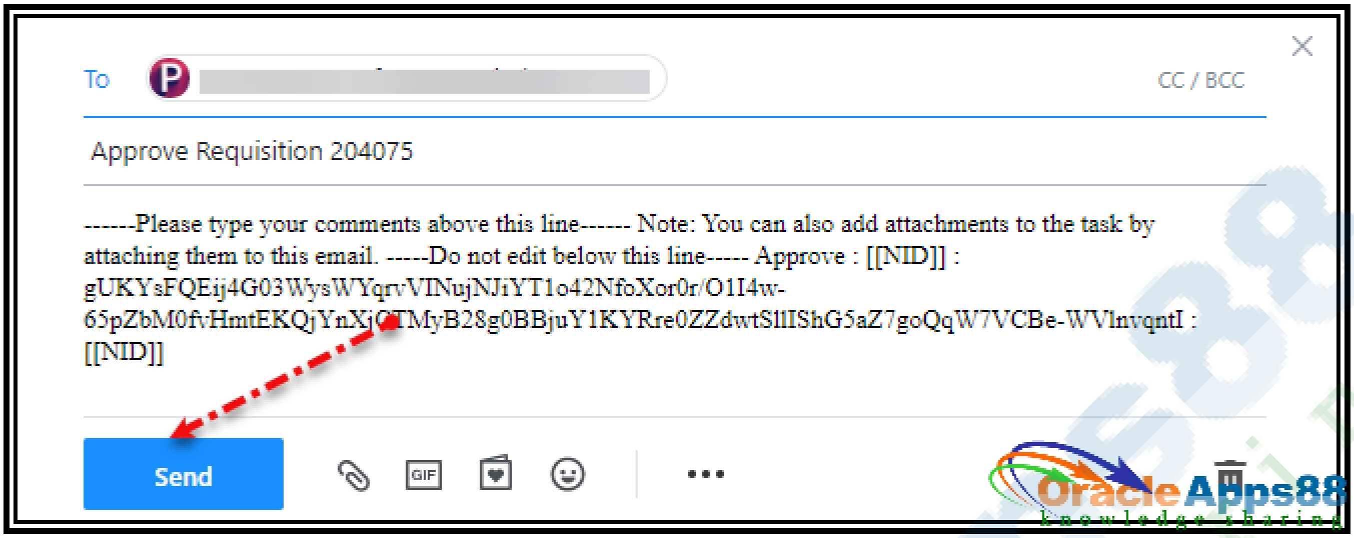
2. Open the Email Notification.

3. View the details of the Requisition, including the Approval Amount, Line Details, etc. Click the PDF to open a copy of the Draft PDF.
4. Click the View Task Details hyperlink to open the Requisition Details in Oracle (if applicable)
5. To approve the Requisition, hover over and click the **Approve** button within the body of the email.

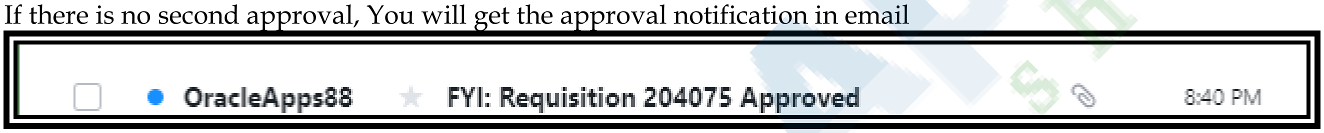


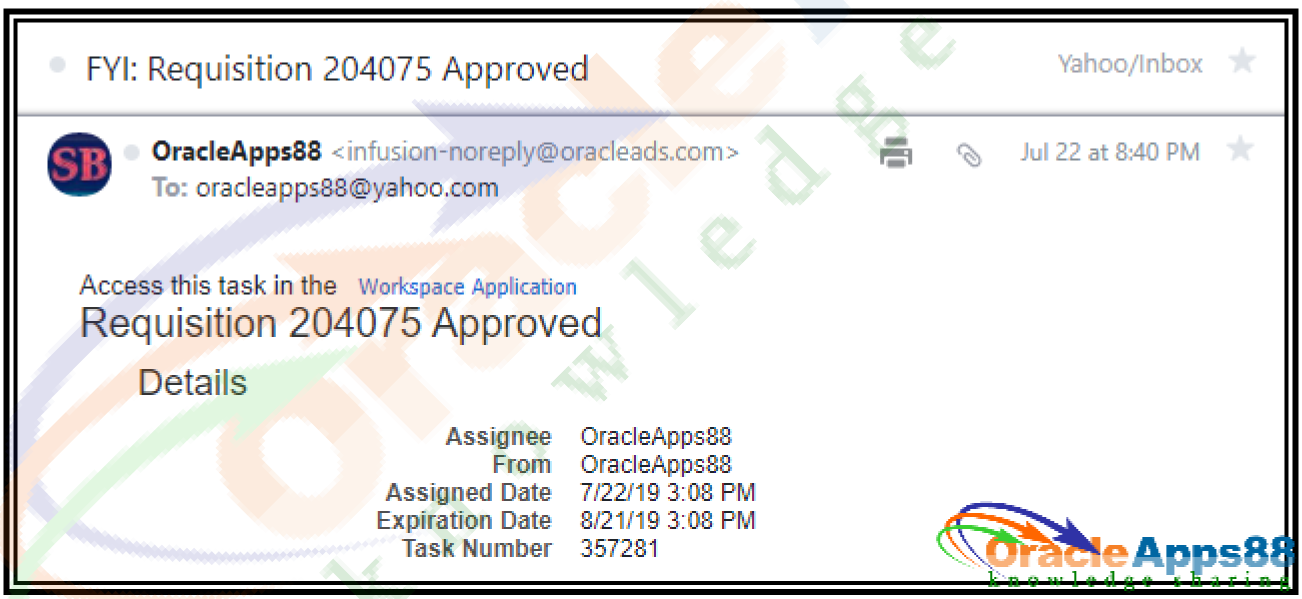
6. A new **Approve Requisition** email will open up in a separate window.
   A. If applicable, enter an approval note ABOVE the ----Please type your comments above this line---

B. Click the **Send** button

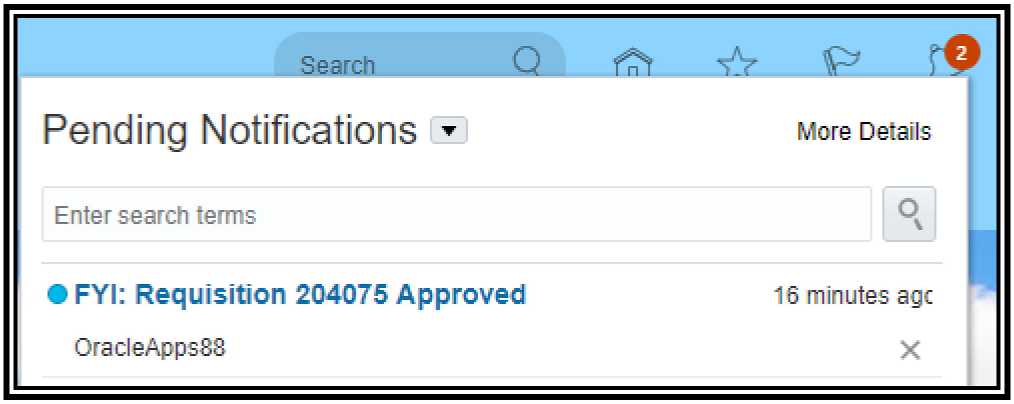


The approval will be sent to Oracle and will update the system. The next required approver will be notified that the Requisition is awaiting approval. After the Buyer Group does their final approval, they will create the Purchase Order. If there is no second approval, You will get the approval notification in email





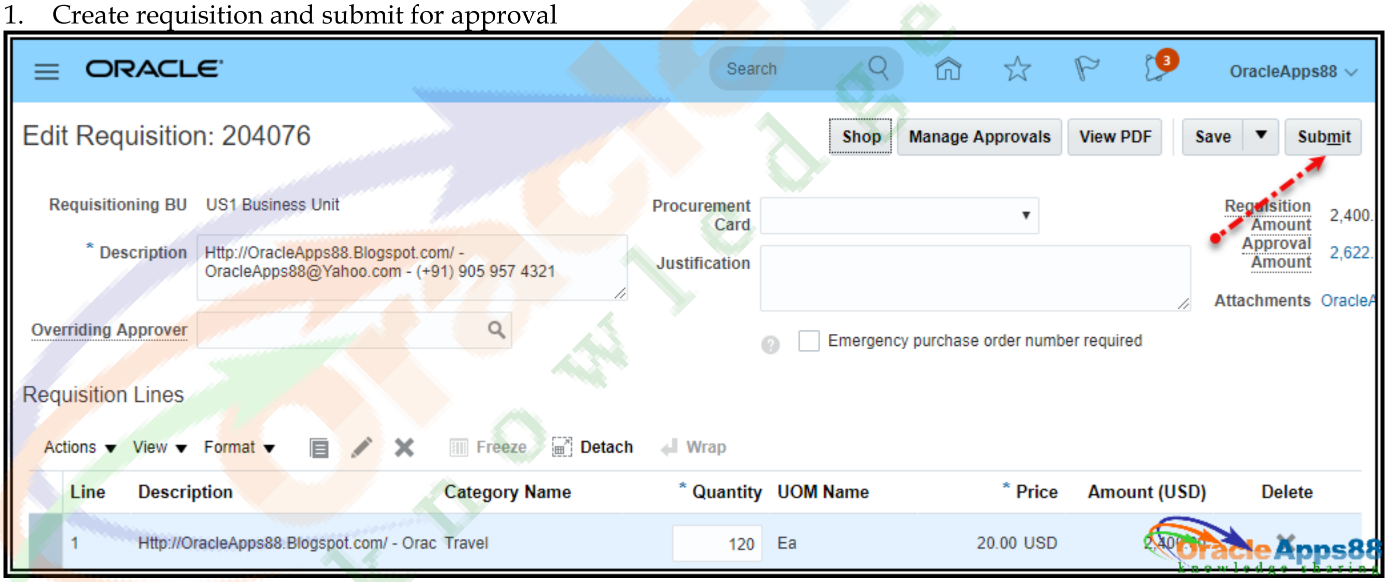
And also will get the notification in oracle



Rejecting a Requisition via Email

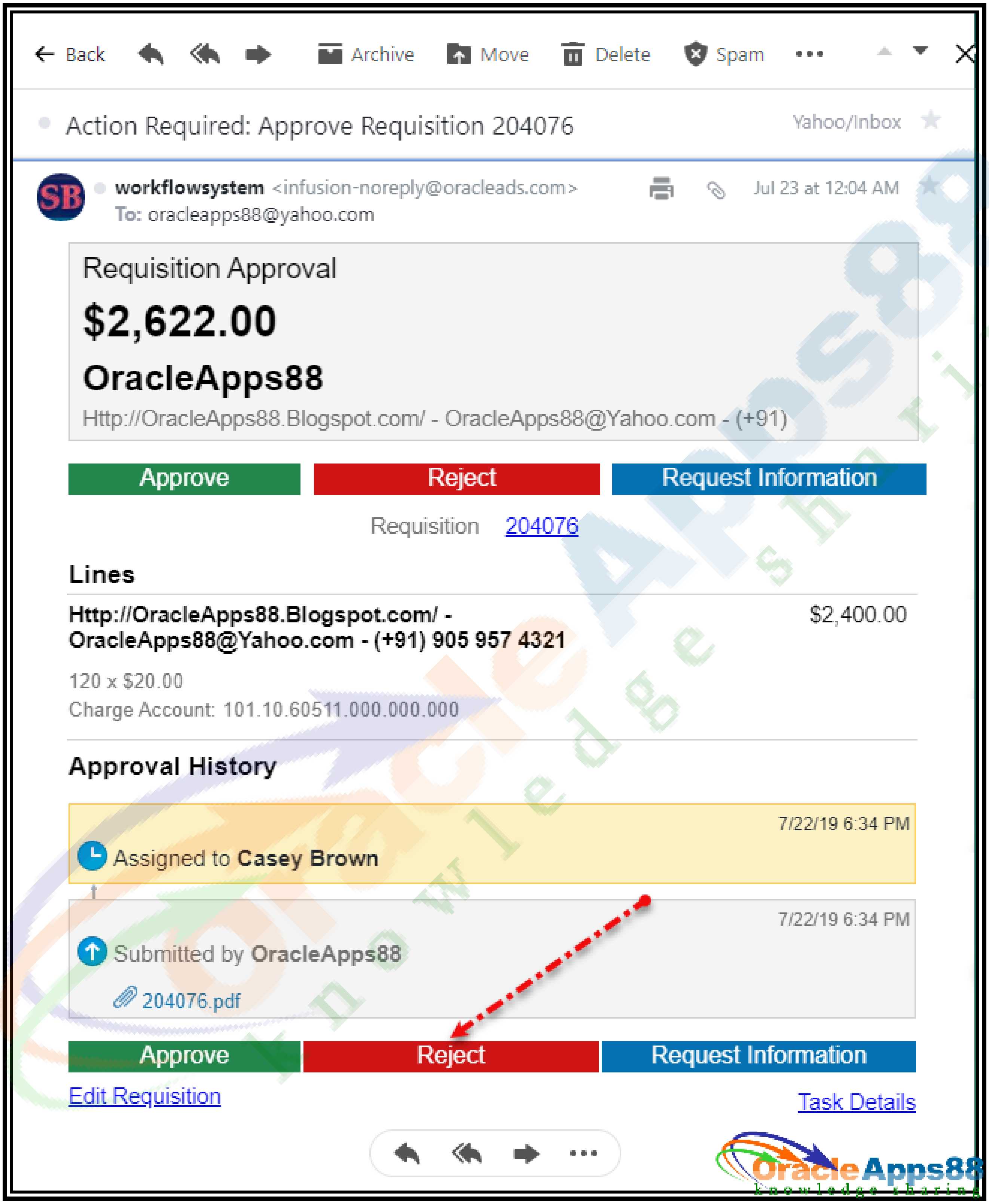
- The approver will receive an Email Notification indicating "Action Required".
- The Email Notification will contain the following:
  - The Header will include the Action Required and Requisition Number
  - The Body of the Email will include the specific details of the Requisition, including the Approval Amount, Requester, Category Name, Cost Center, etc. In addition, it will include a PDF attachment of the draft Requisition plus a link to the Requisition within Oracle.
  - The Body will also include the Action History, Future Approvers and the "actionable" Approve and Reject buttons.

1. Create requisition and submit for approval



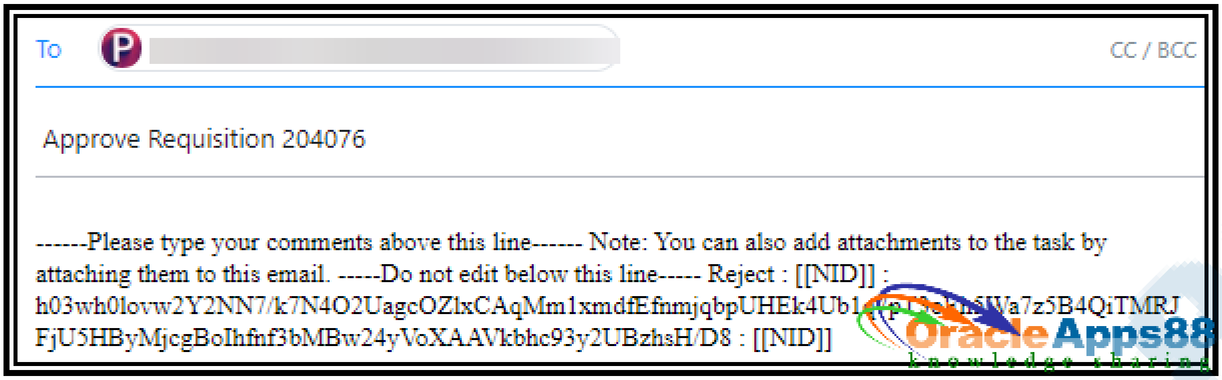
2. Open the Email Notification.

3. View the details of the Requisition, including the Approval Amount, Line Details, etc. Click the PDF to open a copy of the Draft PDF.
   a. Click the View Task Details hyperlink to open the Requisition Details in Oracle (if applicable)
4. To <u>reject</u> the Requisition, hover over and click the **Reject** button/link within the body of the email.

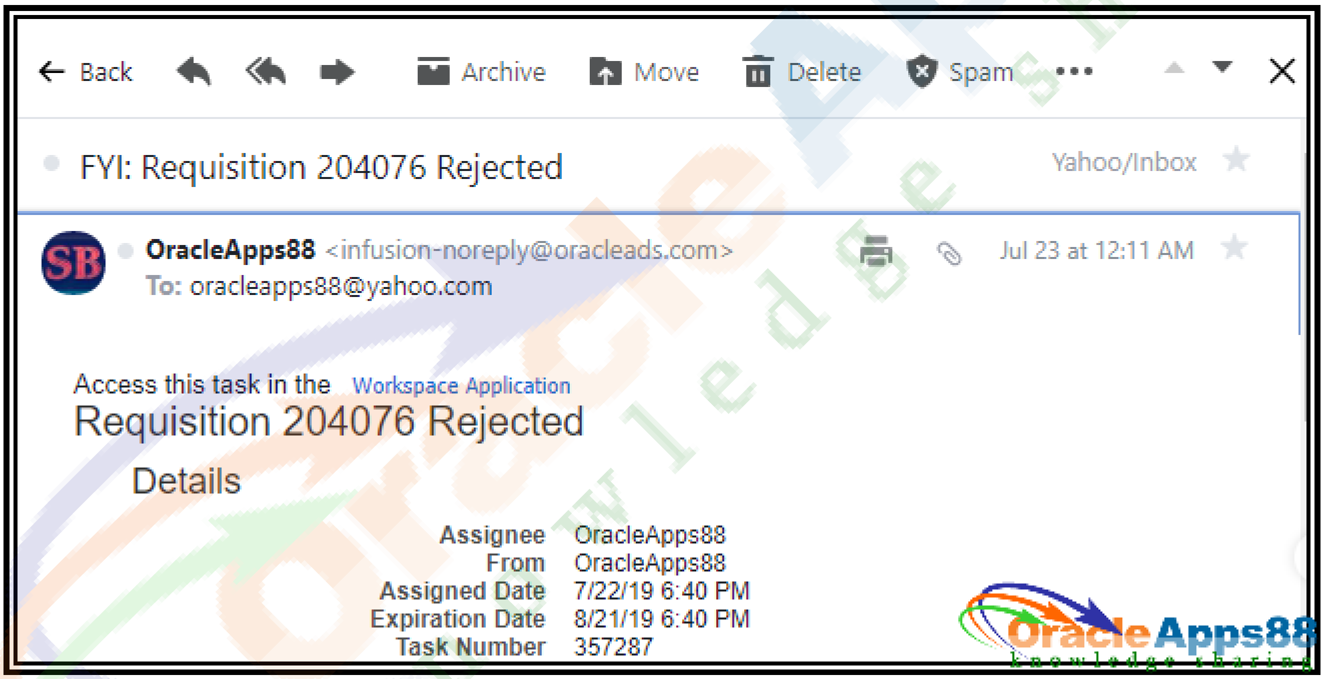


5. A new **Reply Requisition** email will open up in a separate window. The Workflow mailer uses the same reply email (THIS IS A REJECTION EMAIL NOT AN APPROVE REQUISITION EMAIL)
   1. Enter a rejection reason ABOVE the ----Please type your comments above this line---

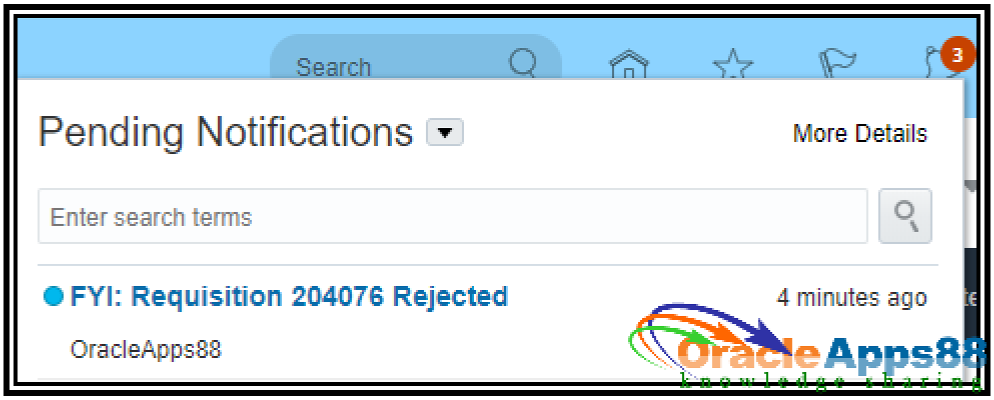
2. Click the **Send** button



6. The rejection workflow will be sent to Oracle and will update the system.
7. The Requester will receive an FYI email and a Workflow Notification indicating that the Requisition has been rejected.

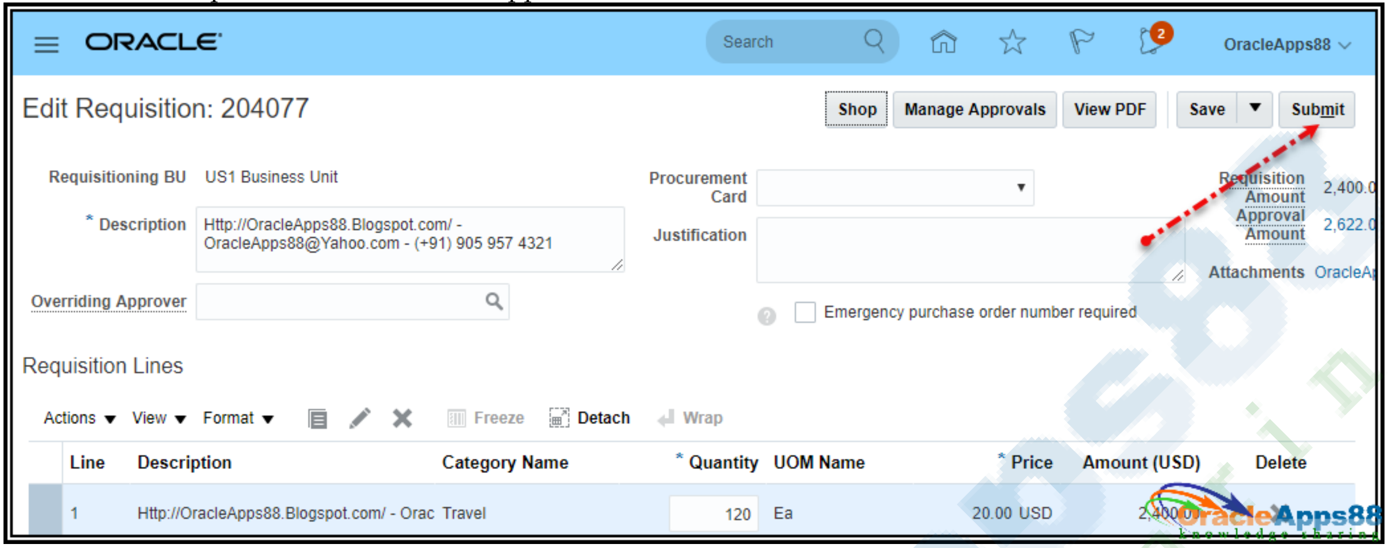


8. The Requisition Status = Rejected within Oracle


Search
3
Pending Notifications
More Details
Enter search terms
FYI: Requisition 204076 Rejected
4 minutes ago
OracleApps88

Approving a Requisition within Oracle

1. Create the requisition and submit for approval



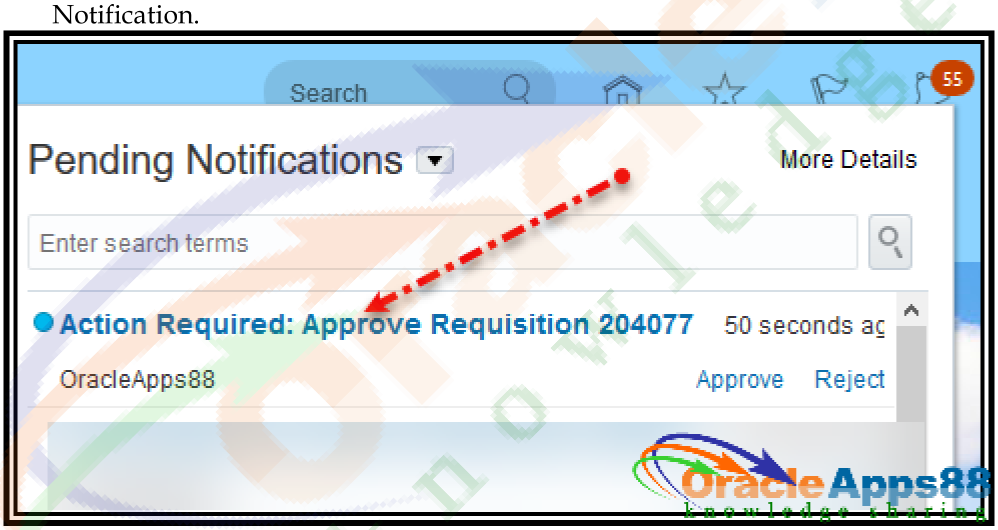
2. From the *Home* page, (A) click the Notifications/bell icon and (B) select the applicable actionable Workflow Notification.

3. The *Approve Requisition* Notification will open in a separate window. Review the details of the Requisition, including the:
   a. Details
   b. Requisition Lines
   c. Comments
   d. Attachments (including PDF of Draft Requisition)
   e. History/Approvals

4. To approve the Requisition, click the **Approve** button. This will close the window and will update Oracle (send the Requisition to the next step in the approval process).
   a. The Notification will no longer be displayed in the approver's Pending Notifications List.

Rejecting a Requisition within Oracle

5. From the *Home* page, (A) click the Notifications/bell icon and (B) select the applicable actionable Workflow Notification.



6. The *Approve Requisition* Notification will open in a separate window. Review the details of the Requisition, including the:
    a. Details
    b. Requisition Lines
    c. Comments
    d. Attachments (including PDF of Draft Requisition)
    e. History/Approvals
7. To reject the Requisition, click the **Reject** button. This will close the window and will update Oracle and will send a Notification to the Requester indicating that the Requisition was rejected
    a. The Notification will no longer be displayed in the approver's Pending Notifications List.

8. The Requester will receive an FYI email and a Workflow Notification indicating that the Requisition has been rejected.
9. The Requisition Status = Rejected within Oracle

Withdrawing and Editing a Pending Requisition

1. From the *Requisition* page, click the **Actions** button and select **Withdraw and Edit**.
    a. Note: this action is only available for Requisitions that are in a status of **Pending Approval**.
        i. If a Requisition is in a status of Incomplete, select the option of Edit.
        ii. If a Requisition is already fully approved/the Purchase Order has been created and it needs to be modified, select the option of Edit Order and complete a Change Order (see the *Appending an Existing Purchase Order via the Requisition* topic)

2. A *Warning* pop-up is displayed indicating that the Requisition will be removed from the approval workflow to make changes. Click the **Yes** button to continue.

3. On the *Edit Requisition* page, make the applicable changes as needed and click the **Save** button. Click the **Submit** button to re-submit the Requisition.
    a. If the Requisition had been previously approved and was changed, it will require re-approval. To eliminate some confusion, prior to re-submitting the revised Requisition, you may want to send a separate email to the approver(s) to notify them that you will be withdrawing and modifying the Requisition.
4. After submitting, the *Confirmation* pop-up is displayed. Click **OK** to close it.

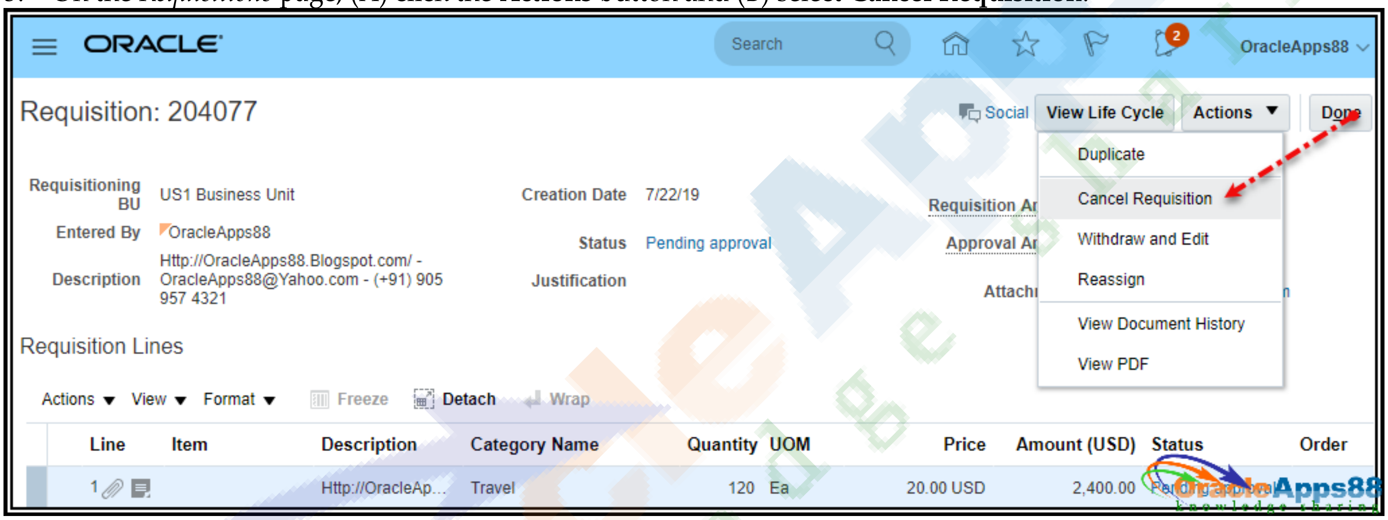
Cancelling a Pending Requisition

- Once a Requisition is submitted, an email notification is sent to the required approvers. If the Requisition needs to then be cancelled, send an email to let the approver(s) know that you are going to be cancelling the Requisition so that the approver(s) do/does not attempt to approve the Requisition via email or within Oracle in the meantime.
  - Depending upon the timing, if an approver attempts to approve a cancelled (or withdrawn) Requisition without realizing it, he/she may receive an error message.

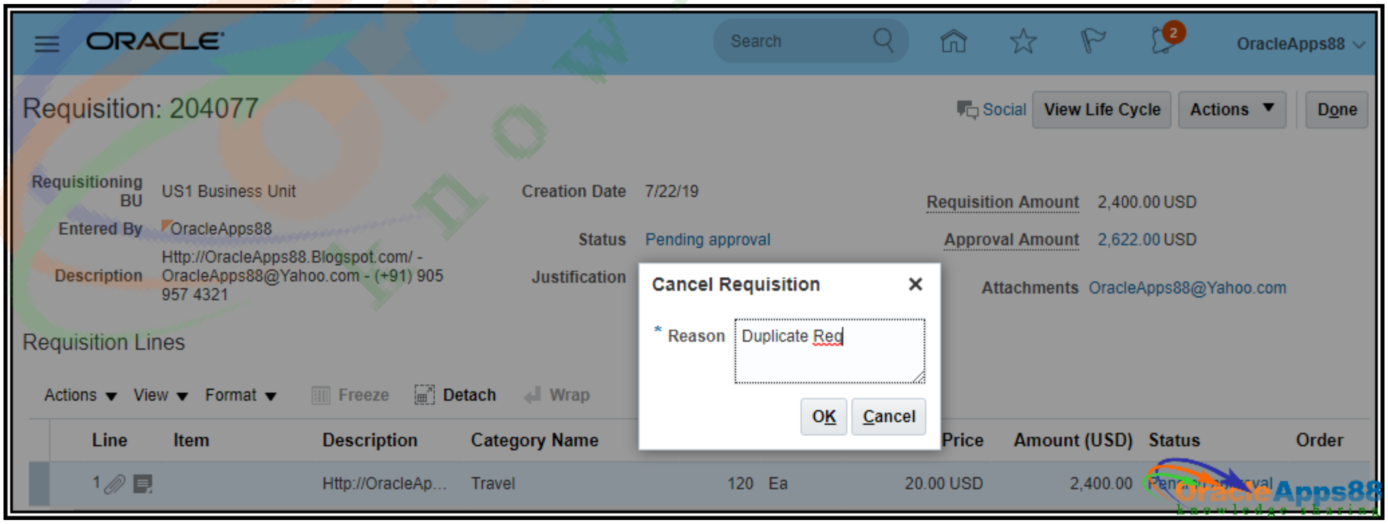
1. Locate the Requisition and open it.

2. Click the **Pending Approval** link next to Status to see who is required to approve the Requisition (any person who does not have a check mark to the left of his/her name is a future approver).
   a. After capturing the names of the future approvers, click the **Done** button to return to the Requisition page.
      i. Send an email (outside of Oracle) to inform the approvers that the Requisition is being cancelled so they do not attempt to approve it.

3. On the *Requisitions* page, (A) click the **Actions** button and (B) select **Cancel Requisition**.

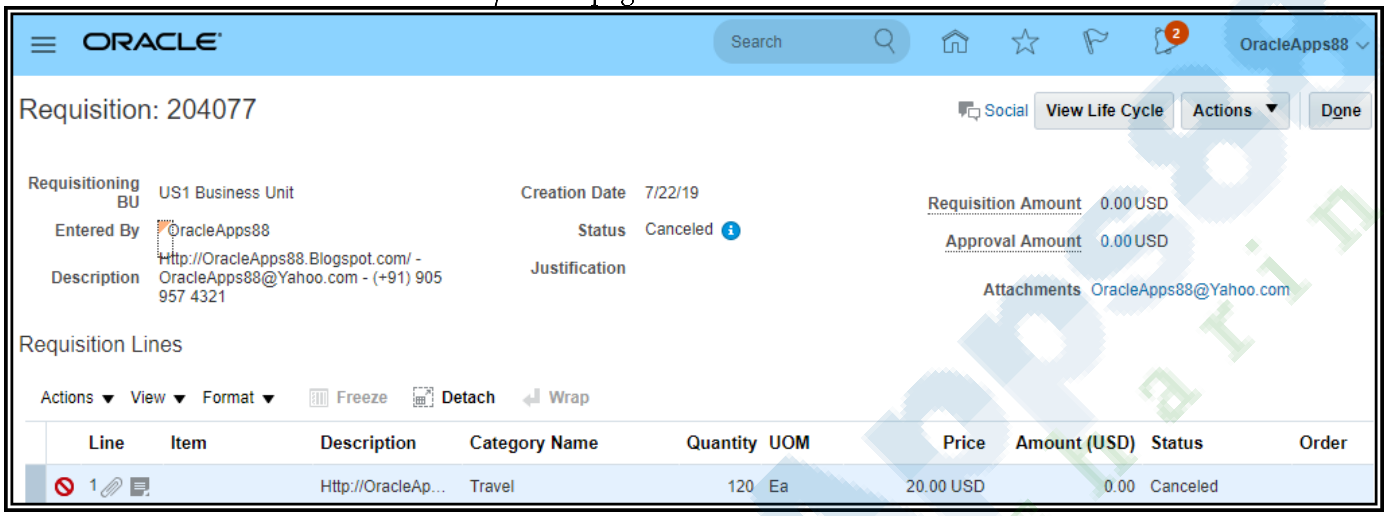


4. In The *Cancel Requisition* pop-up window, (A) enter the Cancellation **Reason** (required field), then (B) click the **OK** button.



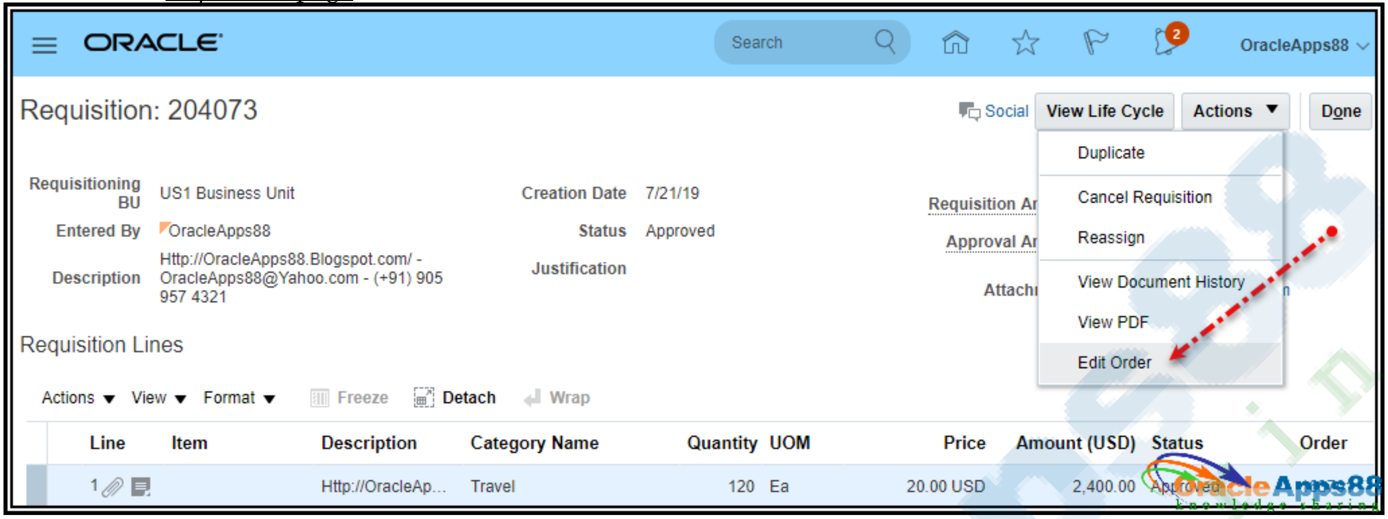
5. A *Confirmation* message is displayed indicating that the Requisition Lines have been cancelled. Click the **OK** button to close the *Confirmation* message.

6. Note the following for the cancelled Requisition:
    a. Requisition **Status** = **Canceled**
    b. Requisition Amount/Approval Amount = 0
    c. Line(s) **Status(es)** = **Canceled**
    d. Cancellation Reason is displayed
7. Click the **Done** button to close the *Requisition* page.

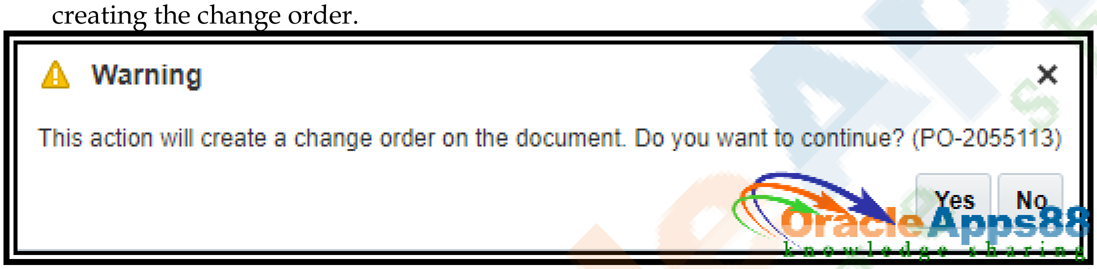


Appending an Existing Purchase Order via the Requisition

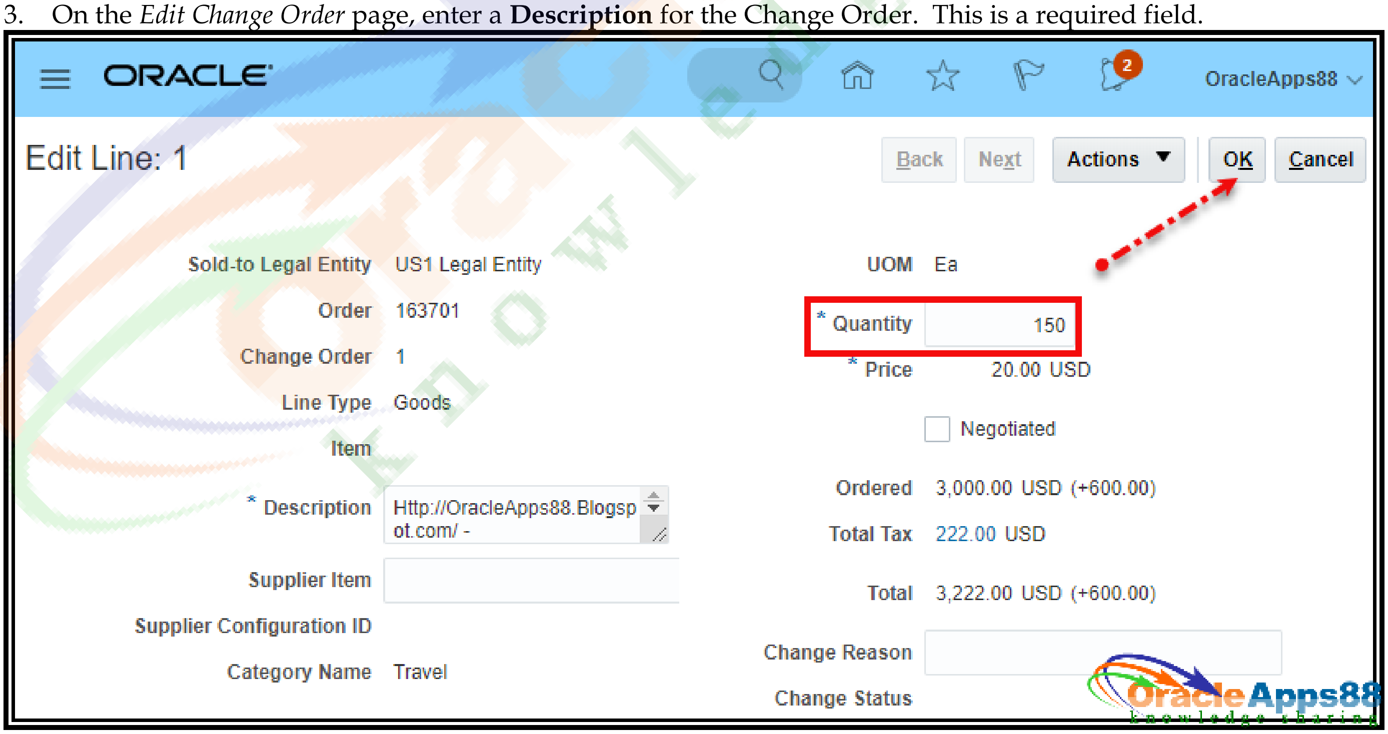
1. From the *Requisition* page that is associated with the Purchase Order, click the **Actions** button and select **Edit Order**.



2. A *Warning* pop-up will be displayed indicating that a change order will be created. Click **Yes** to continue with creating the change order.



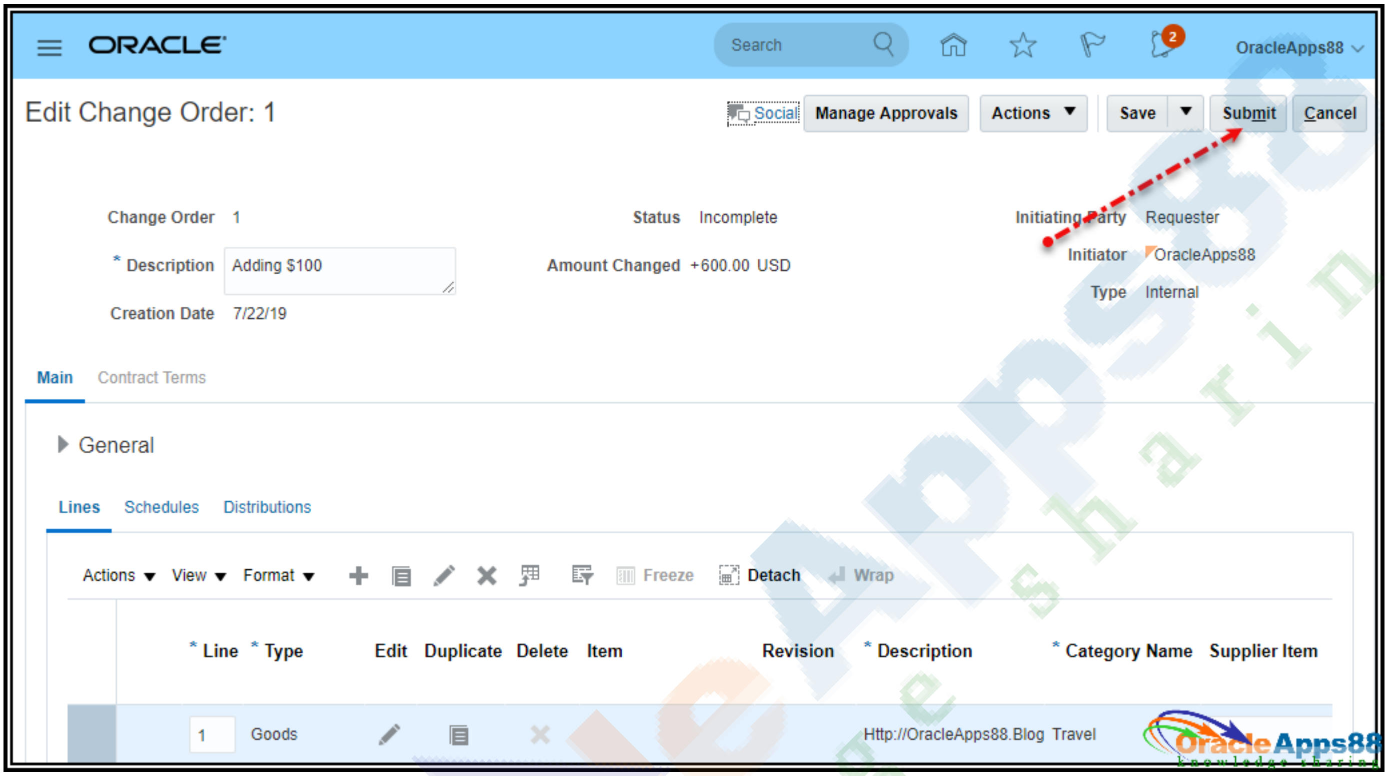
3. On the *Edit Change Order* page, enter a **Description** for the Change Order. This is a required field.



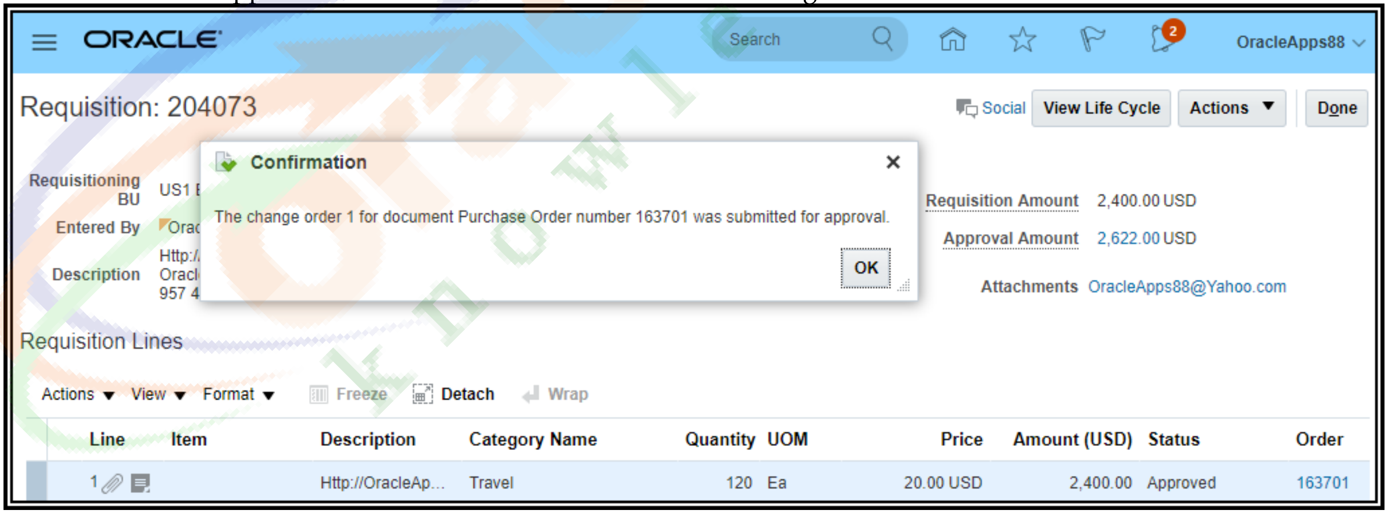
4. If there is a change in the Price (for Services or Goods) or Quantity (for Goods) update accordingly.

a. Note the **Amount Changed (+900.00)** field was populated automatically in the header based on the update made to the line (Price was updated to $1,800.00)

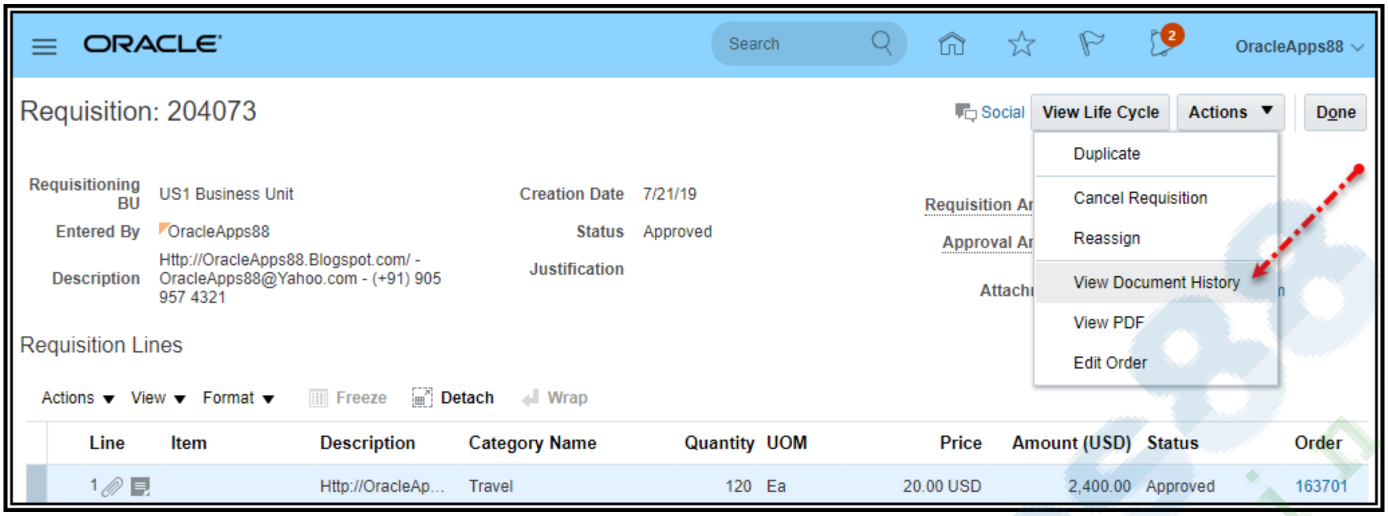
5. If the change is a new line, click the + icon in the Lines region to add a new line and add the details.
6. Click the **Save** button after making all updates.
7. Click the **Submit** button.



8. A *Confirmation* pop-up message is displayed indicating that the Change Order for the Purchase Order was submitted for approval. Click the **OK** button to close the message.



9. The Change Order is submitted for approval based on the **change value**, not the total value of the Purchase Order/Requisition.
   a. The Requisition will retain the **original amount** entered for the initial Requisition
   b. To view the Purchase Order (which will have the new total value), access the Requisition Document history (*Requisition* > *Actions* > *View Document History* > click Purchase Order Link to view)



10. The *Document History* page for the Requisition is displayed. Click the **Reference Document** link for the PO change to review the details.

11. The *Review Changes* page for the PO Change Order is displayed.
12. Click the **Done** button to close the page.

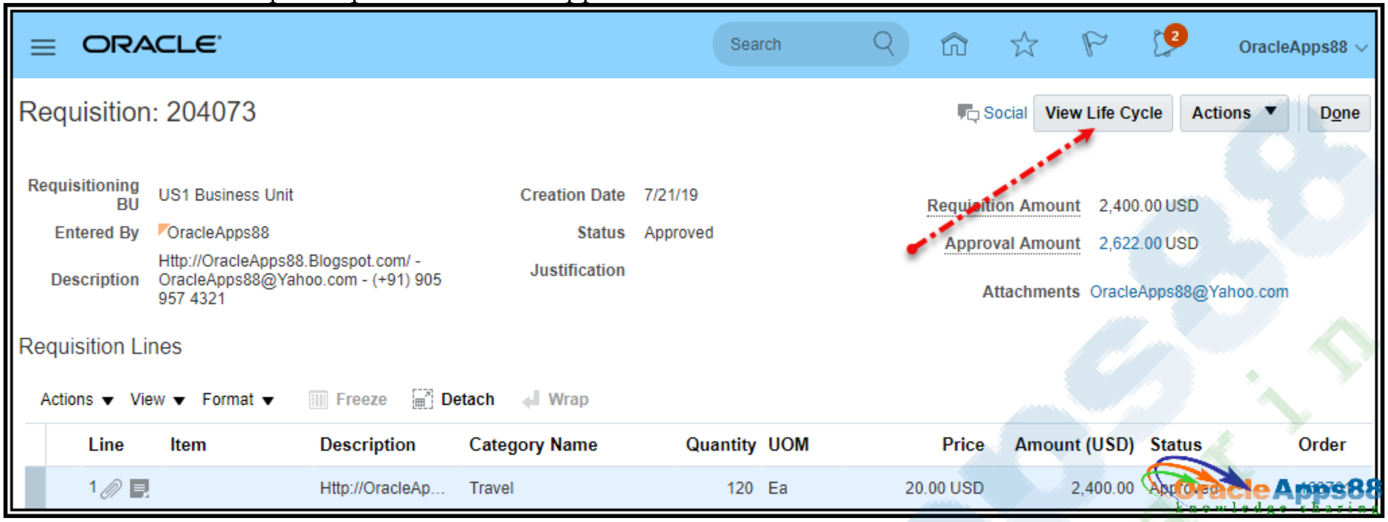
13. Once the Change Order is approved:
    i. The Purchase Order will display the updated value
    ii. The Requester and Buyer Group will receive a non-actionable FYI notification.

14. The Email will contain a PDF copy of the revised Purchase Order/Change Order^

    ^as of late Dec 2018, there is currently an Oracle bug that does not "Rev" the Change Order. The team is working with Oracle on a resolution.

Viewing the Requisition Life Cycle

1. On the *Requisition* page of a specific Requisition, click the **View Life Cycle** button.
   a. This example Requisition is in an Approved Status and has a Purchase Order associated



2. The Requisition Life Cycle page is displayed. In the **Order** region, click the hyperlink for the **Purchase Order** Number.

3. The *Purchase Order* page is displayed.
   a. In the upper right corner is the **Order Life Cycle** which includes a bar chart display of the Ordered, Received, Delivered and Invoiced (based on Amount) for this Order.
   b. The General region displays the requisitioning and supplier-related attributes for the Purchase Order. The **Terms** are displayed below the General region.
   c. The **Lines** tab displays the details of the line, including the Status (Closed).
4. Click the **Done** button to close the Purchase Order page.

The *Requisition Life Cycle* page also displays Shipments, Receipts and Invoices related to a Requisition (if applicable for the specific Requisition).

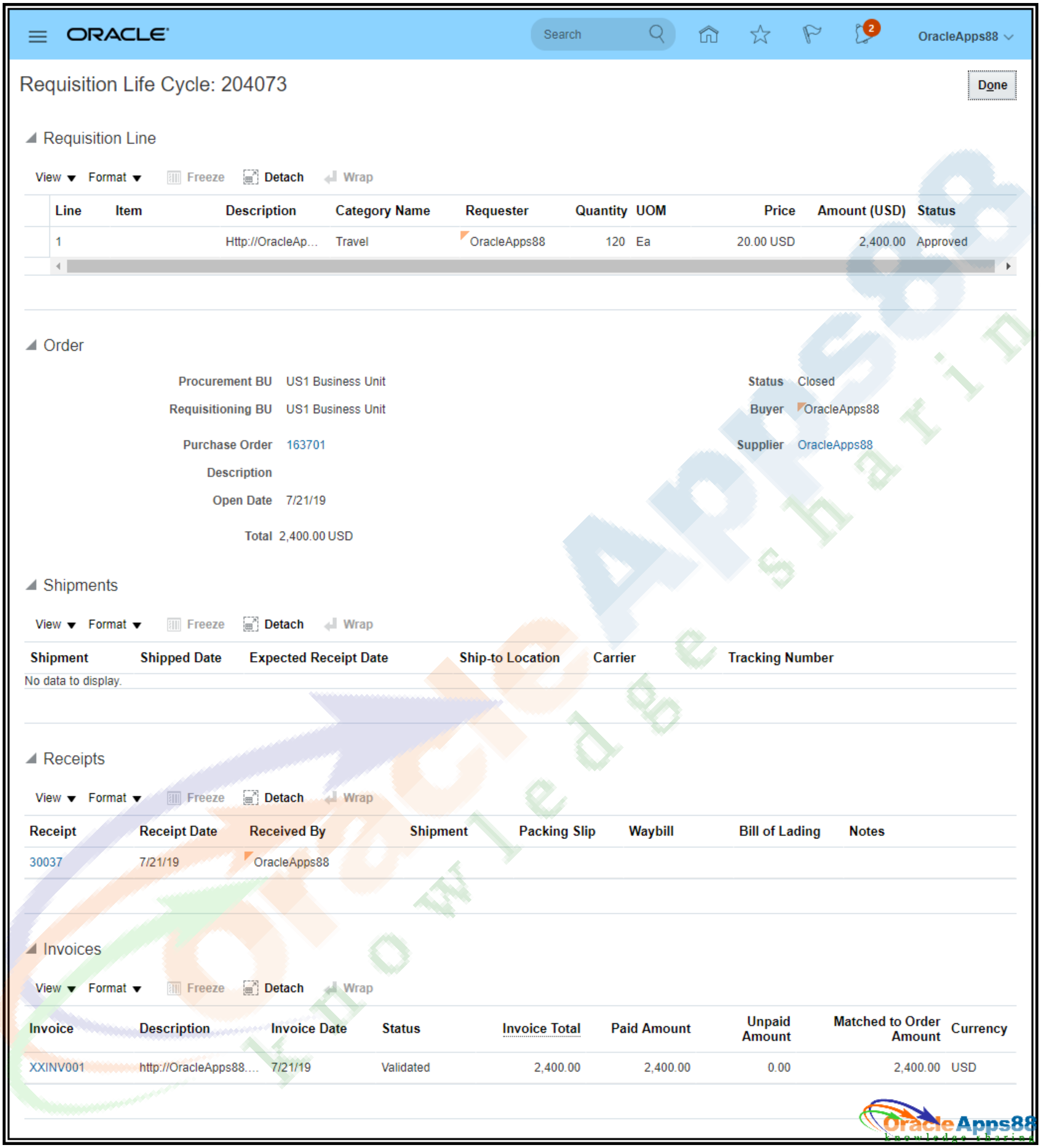
5. In the **Receipts** region, click the **Receipt** number to open/view the details.

6. The *Receipt* page is displayed. It includes the **Summary** header information and the **Line(s)** details.
7. Click the **Done** button.

8. The Invoices region displays the Payables Invoices associated with the Purchase Order tied to this Requisition.
   a. It includes a hyperlink to the Invoice, the Invoice Date, Status, Paid Amount, Unpaid Amount
9. Click the Invoice Number hyperlink

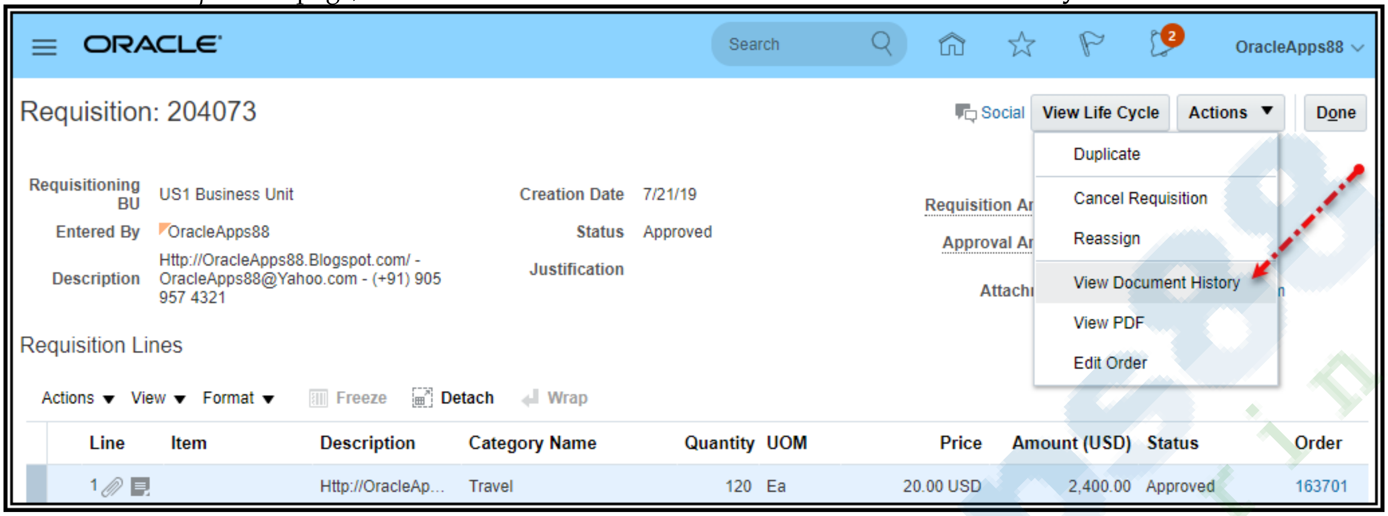
10. The *Invoice* page is displayed.
    a. Note the Purchase Order to which it is matched at the Line.
11. Click the Done button to return to the Requisition.

12. Click the **Done** button to close the *Requisition Life Cycle* page.


ORACLE
Search
OracleApps88
Requisition Life Cycle: 204073
Done
Requisition Line
View Format Freeze Detach Wrap
Line Item Description Category Name Requester Quantity UOM Price Amount (USD) Status
1 Http://OracleAp... Travel OracleApps88 120 Ea 20.00 USD 2,400.00 Approved
Order
Procurement BU US1 Business Unit
Requisitioning BU US1 Business Unit
Purchase Order 163701
Description
Open Date 7/21/19
Total 2,400.00 USD
Status Closed
Buyer OracleApps88
Supplier OracleApps88
Shipments
View Format Freeze Detach Wrap
Shipment Shipped Date Expected Receipt Date Ship-to Location Carrier Tracking Number
No data to display.
Receipts
View Format Freeze Detach Wrap
Receipt Receipt Date Received By Shipment Packing Slip Waybill Bill of Lading Notes
30037 7/21/19 OracleApps88
Invoices
View Format Freeze Detach Wrap
Invoice Description Invoice Date Status Invoice Total Paid Amount Unpaid Amount Matched to Order Amount Currency
XXINV001 http://OracleApps88.... 7/21/19 Validated 2,400.00 2,400.00 0.00 2,400.00 USD

Viewing Document History of a Requisition

1. From the *Requisition* page, click the **Actions** button and select **View Document History**.



2. The *Document History* page for the Requisition is displayed. This includes the:
   a. Action Performed
   b. Performed By
   c. Action Date
   d. Requisition Number
3. Click the **Done** button to close the *Document History* page.

Addendum: Approvals Matrix Rules

- Based on the dollar value of the Requisition, it will need to go through the following levels of approvals before it will go through the final review/approval within the Buyer Group:

Job Name	Approval Amount		Job Level	Rule Placement
CEO	greater than or equal to $2M	greater than or equal to $2M	9	HR Hierarchy
PFO	less than $2M	greater than or equal to $1M, less than $2M	8	HR Hierarchy
COO, SVP BusOPS, EVP SC	less than $1M	greater than or equal to $500K, less than $1M	7	HR Hierarchy
CLO, CMO, CCO	less than $500K	greater than or equal to $250K, less than $500K	6	HR Hierarchy
SVP, EVP	less than $250K	greater than or equal to $150K, less than $250K	5	HR Hierarchy
VP	less than $150K	greater than or equal to $50K, less than $150K	4	HR Hierarchy
Dir, Sr Dir, Exec Dir, GM	less than $50K	greater than or equal to $10K, less than $50K	3	HR Hierarchy
Assoc Dir	less than $10K	greater than or equal to $5K, less than $10K	2	HR Hierarchy
Mgr, Sr Mgr	less than $5K	greater than or equal to $1K, less than $5K	1	HR Hierarchy
Others	less than $1K	greater than 0, less than $1K	Auto-Approve	HR Hierarchy
Pre-Approver	>$1K	(Budget Delegate)		Pre-Approval Rule

Join the https://t.me/OracleApps88 group or Connect with me at @apps88 (https://t.me/apps88) or **(+91) 9059574321** in **Telegram**, to get more information on Oracle EBS R12/Cloud (Fusion) applications.