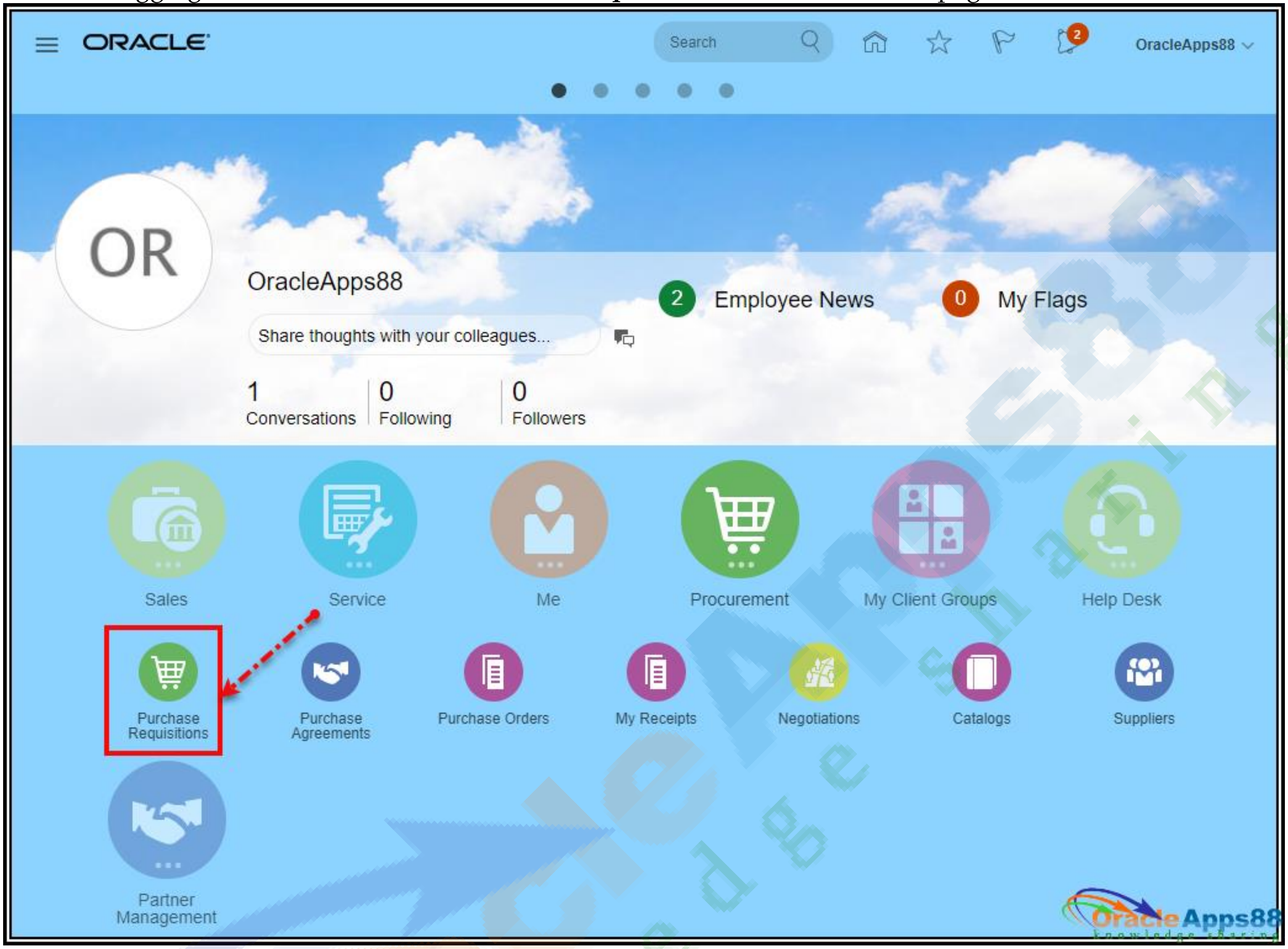
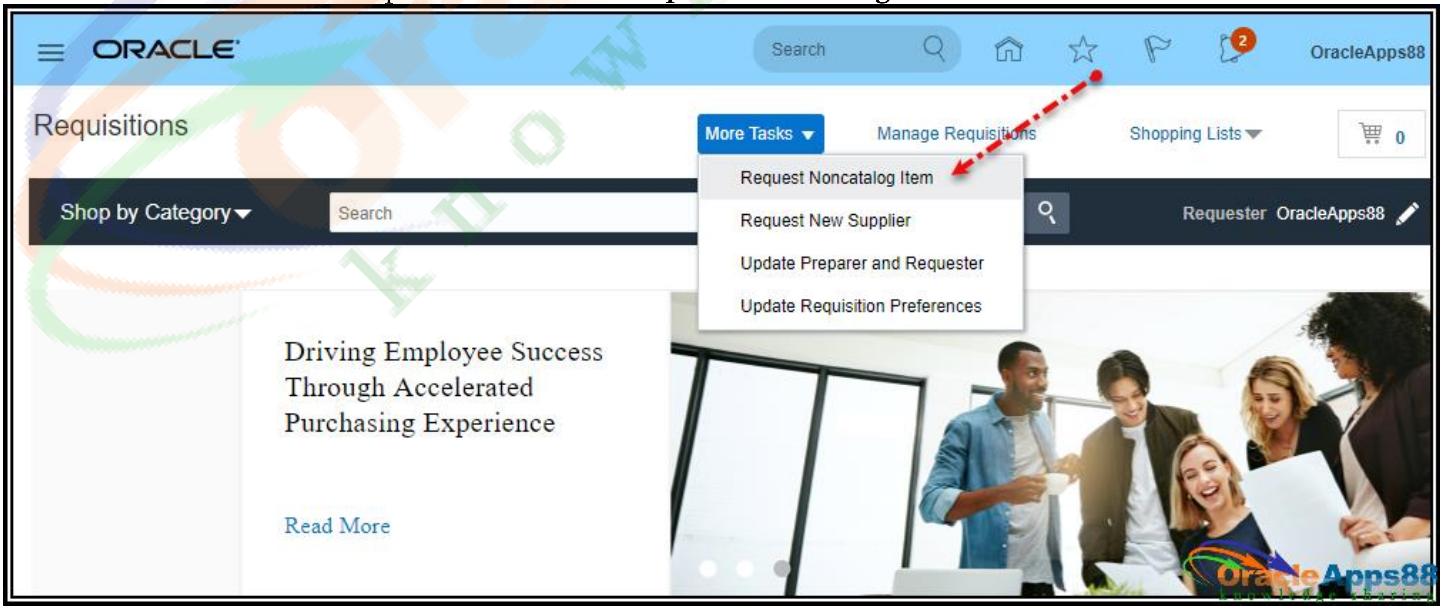
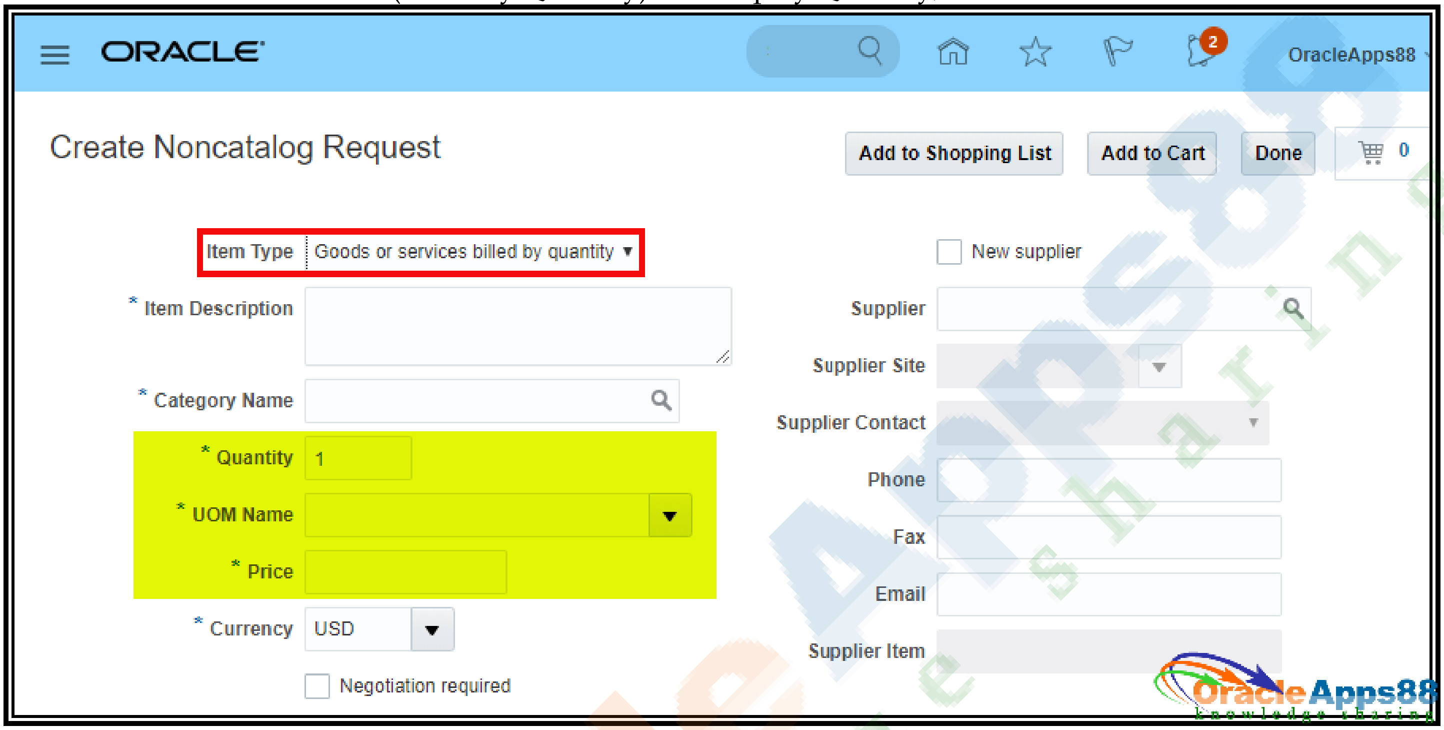
1. After logging in to Oracle, click the **Purchase Requisitions** icon on the Homepage.



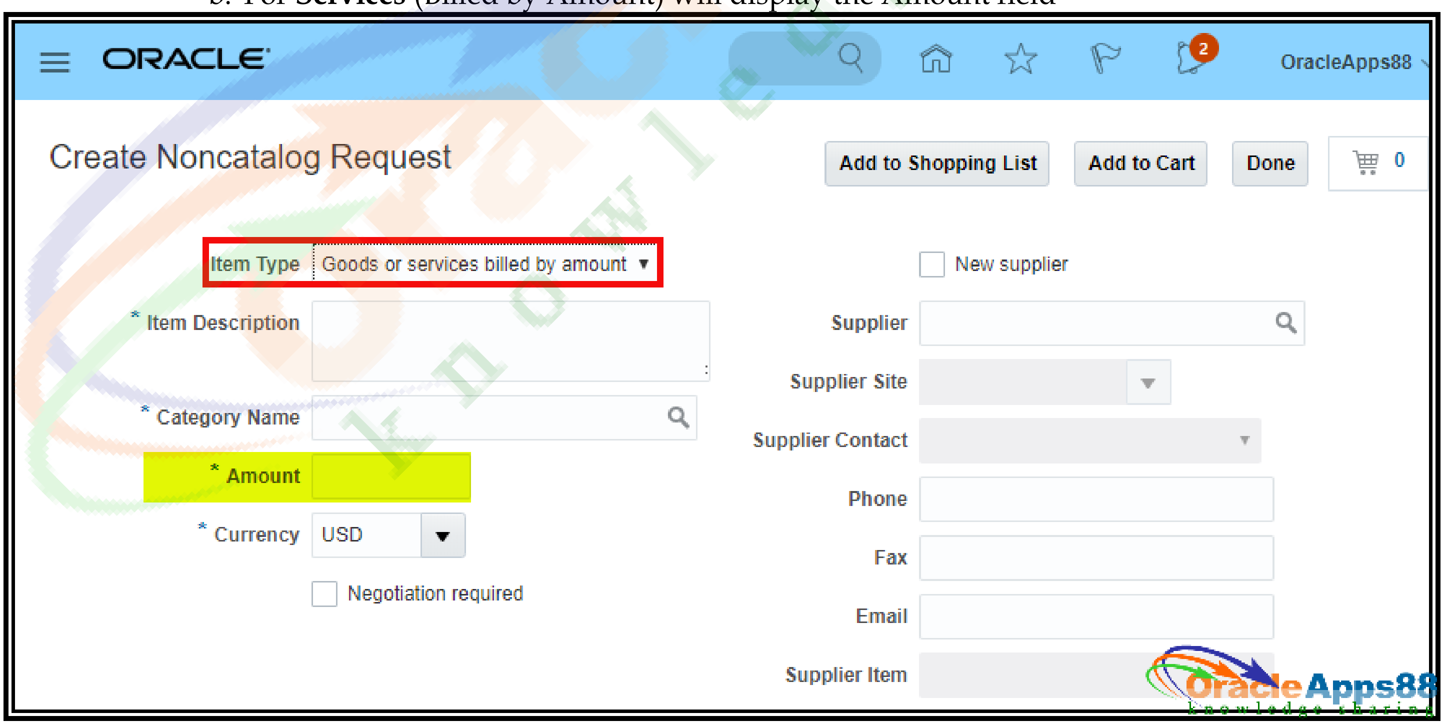

2. Click the **More Tasks** dropdown and select **Request Noncatalog Item**.



3. 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.
4. 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

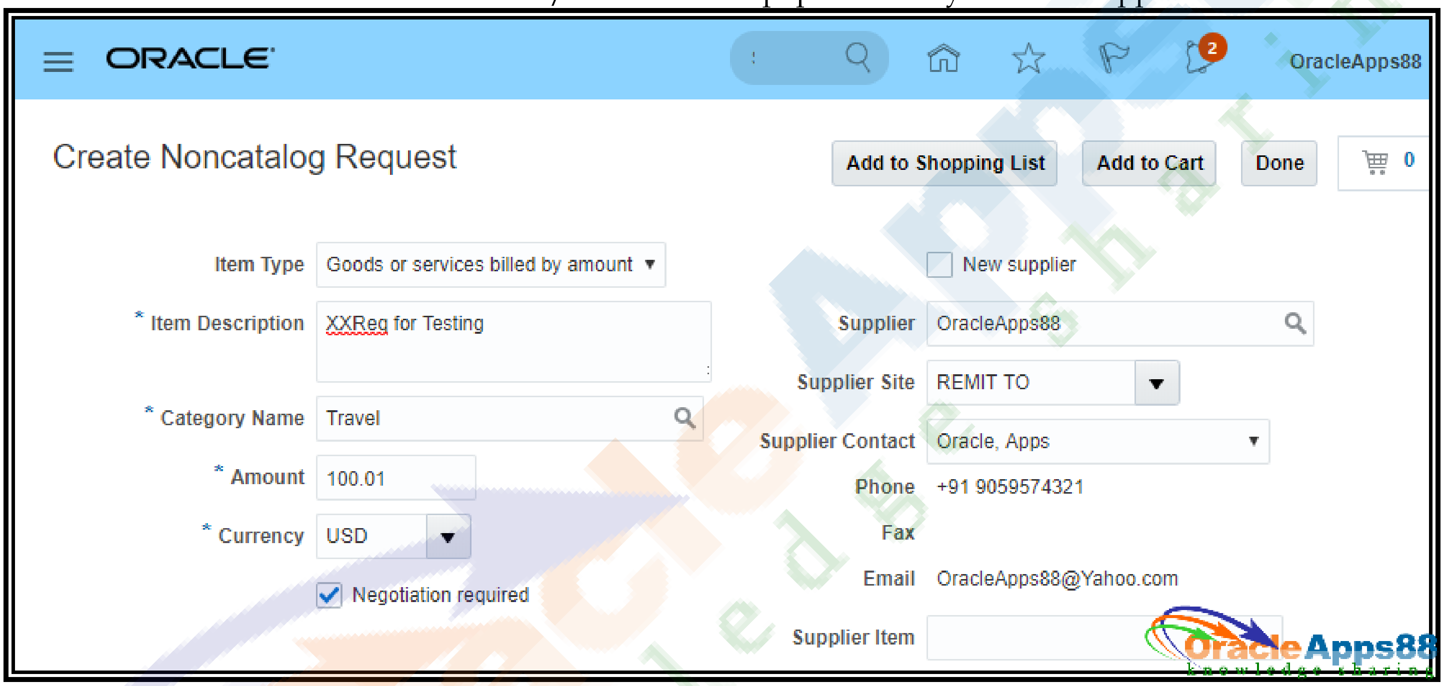



      b. For **Services** (Billed by Amount) will display the Amount field

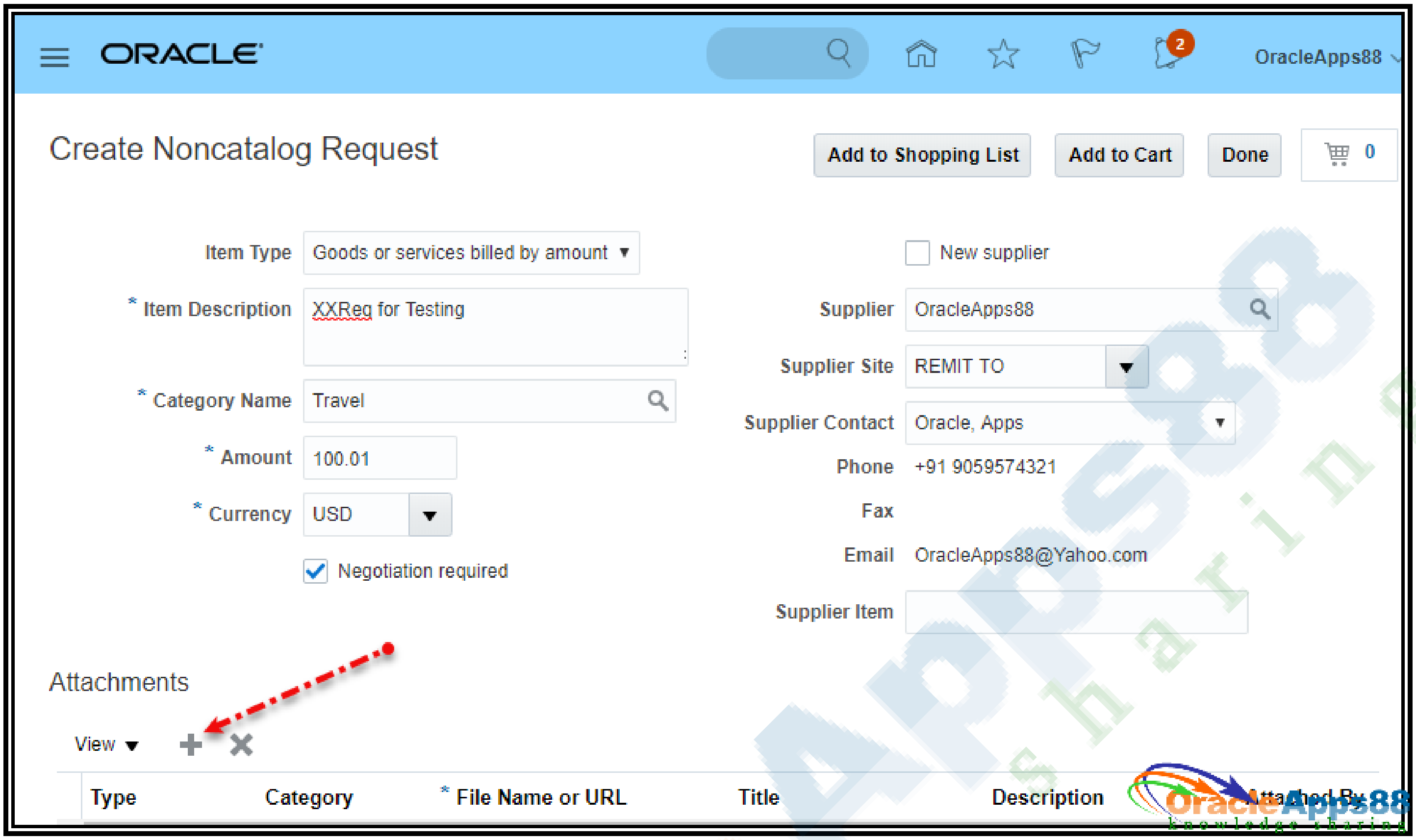


5. Enter an **Item Description** (A).
6. Enter the **Category Name** – examples Consulting Fees/Lab Supplies/Office Supplies/etc.
    i. Enter a partial value of the Category in the Category Name field (B) and the Category should begin to populate; select the appropriate value (C) from the list as shown.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

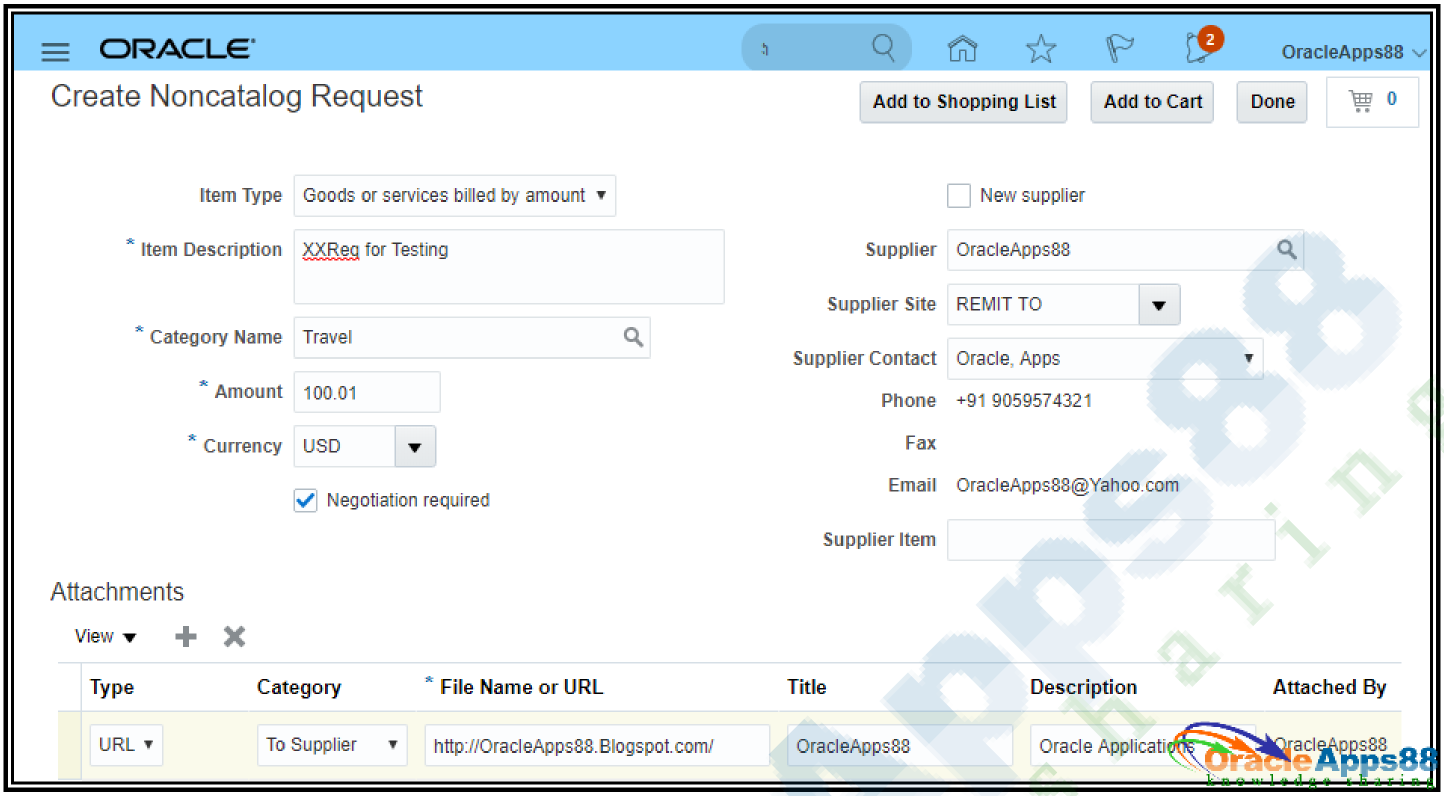
9. Select the **Supplier**.
10. If there is only one Site available, it will default. Otherwise choose the **Supplier Site**.
11. If there is a **Supplier Contact** setup in Oracle, it will be available to select.
12. Enter an optional **Phone** Number, **Fax** and **Email**, if desired.
13. Optionally, 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.



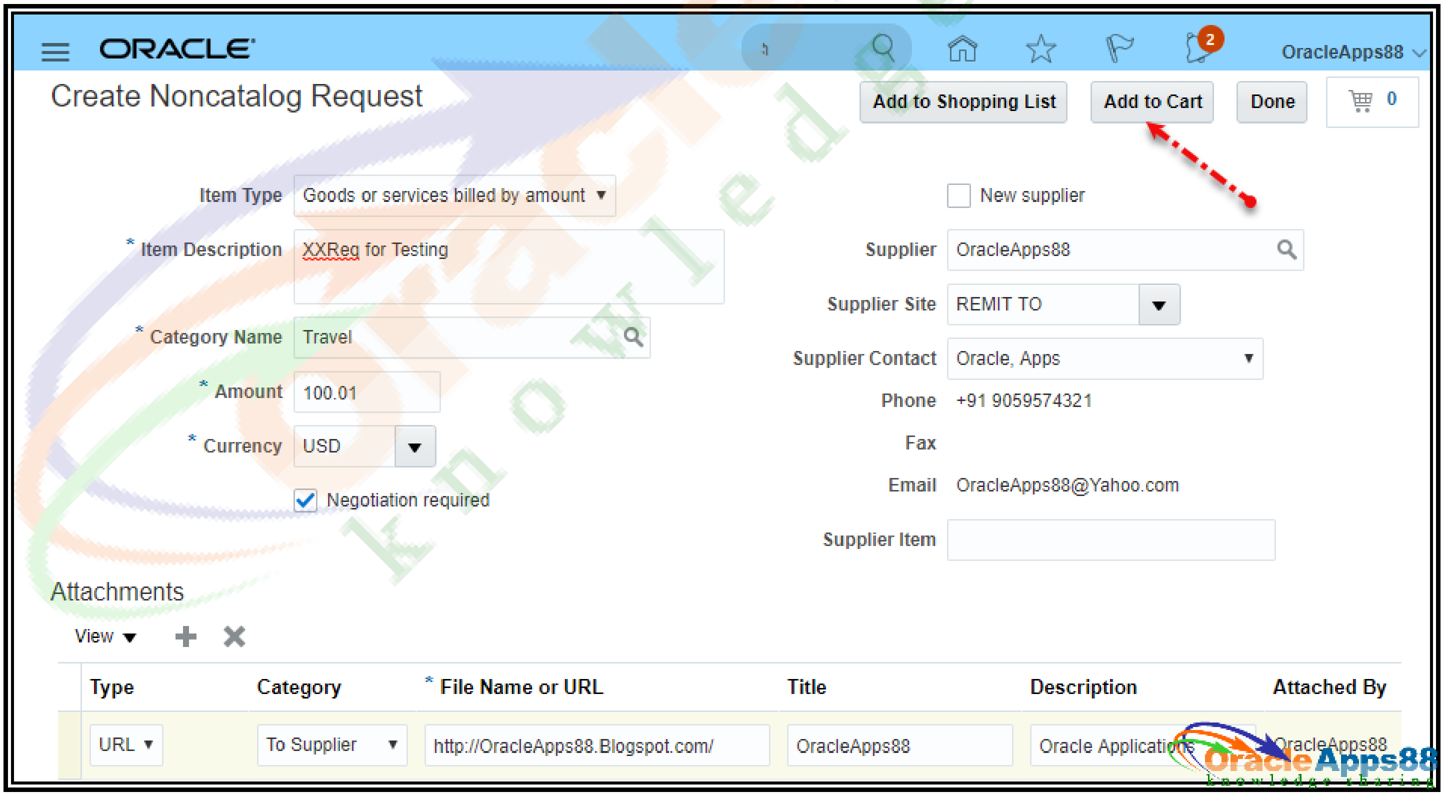

14. To add an attachment such as a copy of a Contract, Master Services Agreement, Quote, etc., or a note to the Buyer or Supplier, click the **Add** button (+ icon) in the **Attachments** region.




15. 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.
16. 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.

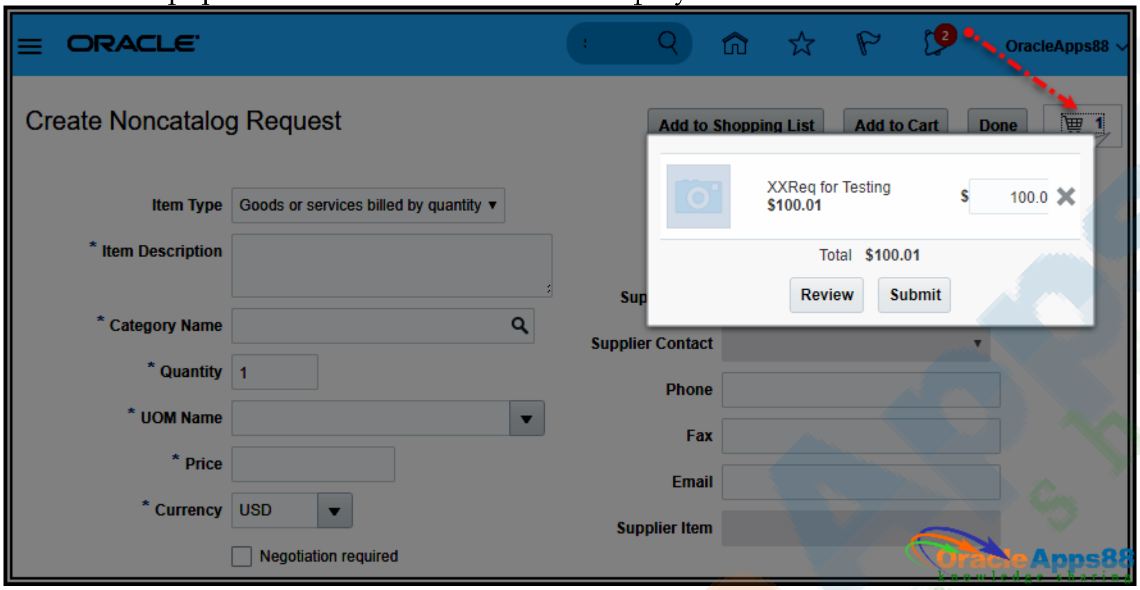


17. Once all fields in the *Create Noncatalog Request* page are completed and the attachment(s) added, click the **Add to Cart** button.

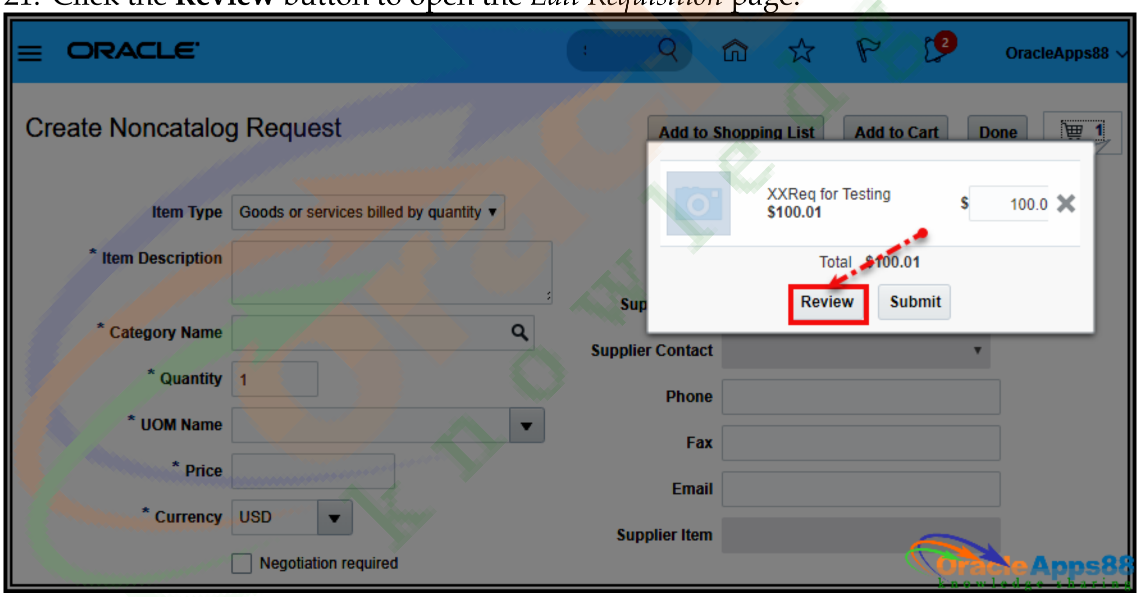


18. The line has been added to the Requisition per the pop-out note and the number reflected next to the Shopping Cart icon in the upper right corner of the page.
    i. Note: The previously populated fields in the *Create Noncatalog Request* page are now empty. Fill out the fields and click the **Add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

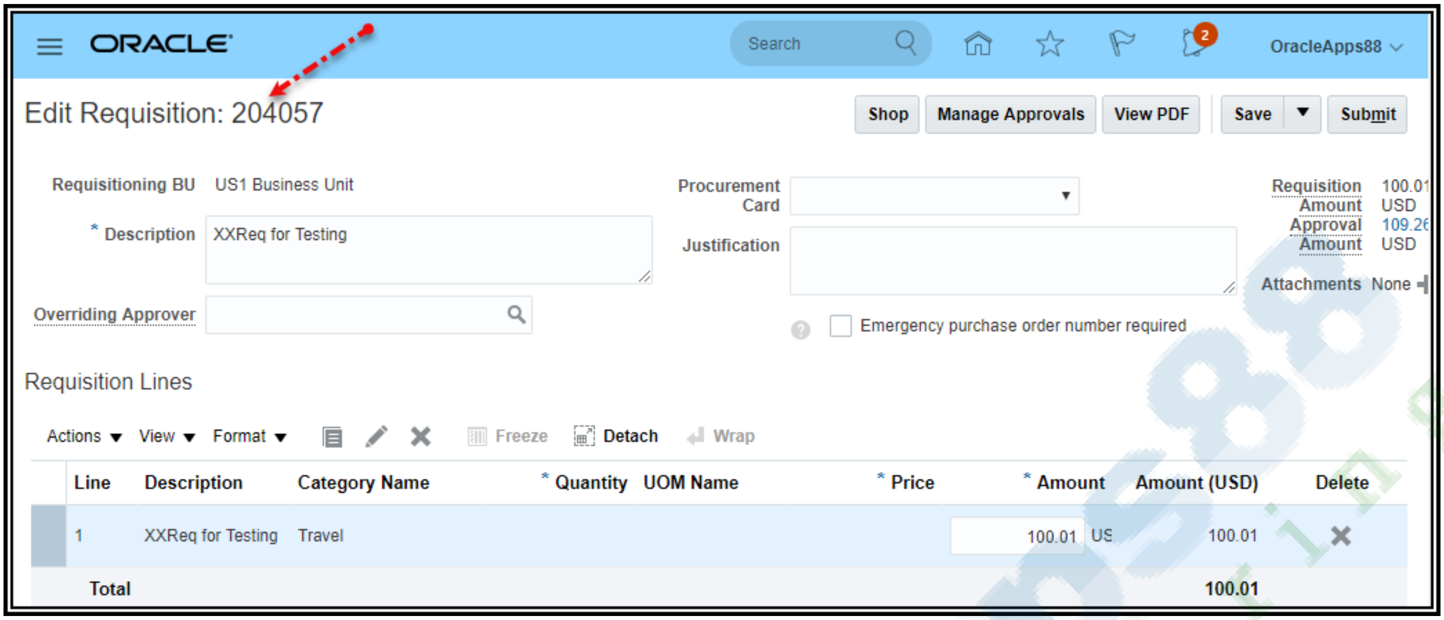

19. To proceed without adding another line at this point, click the number next to the Cart
20. Another pop-out with a Review button is displayed.



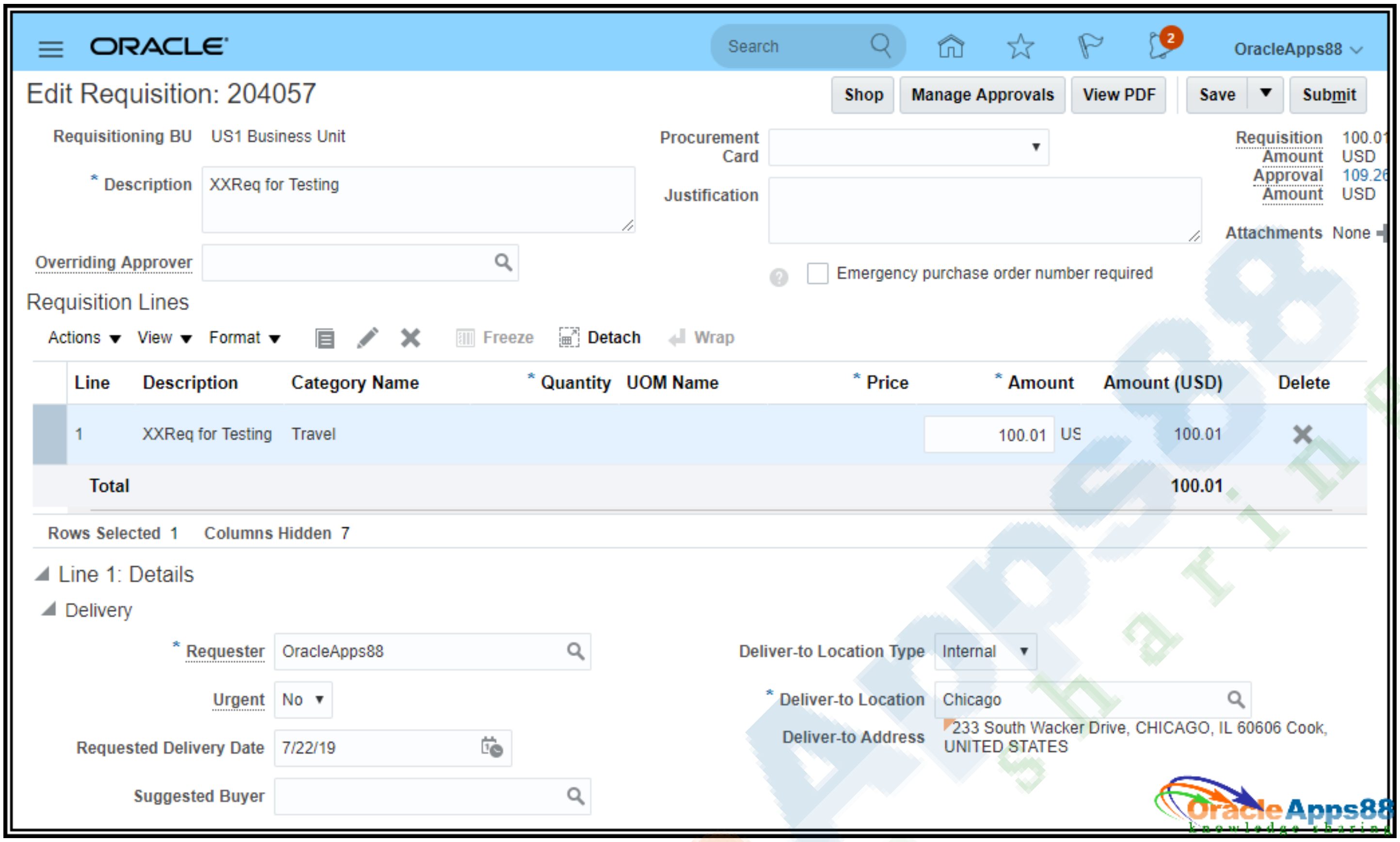

21. Click the **Review** button to open the *Edit Requisition* page.




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




23. 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).
24. The **Requested Delivery Date** defaults to a week from today's date but can be changed.
25. 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.




26. 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

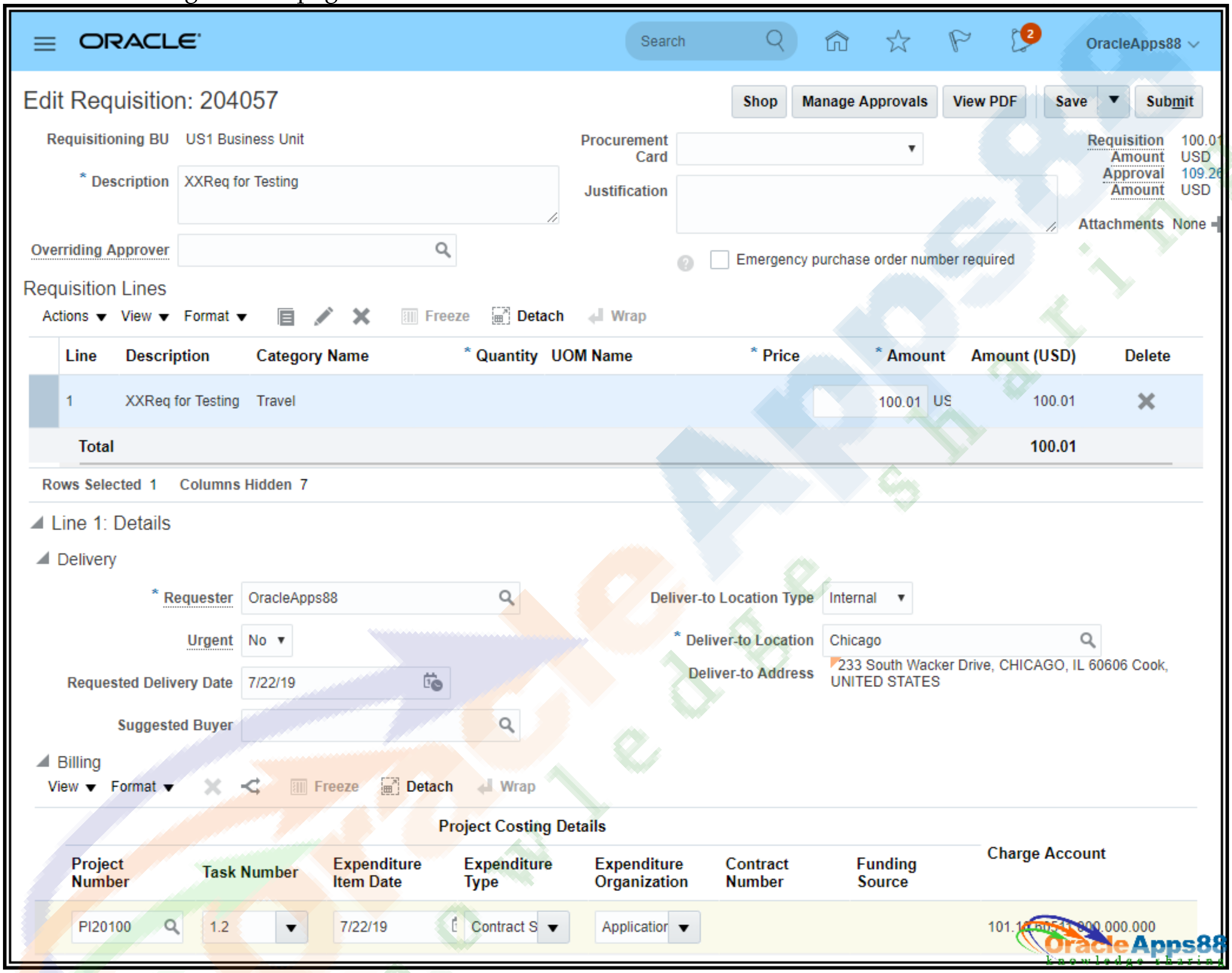
27. The **Line Details > Billing** section also includes the Project Costing Details section.
    i. Note: A Project, Task, Expenditure Item (that matches the Category) and Expenditure Org will be required to be entered for each line when entering a requisition for Project-related goods/services. Liaise with FP&A contact for assistance on which Project to use.
28. 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).

29. 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.

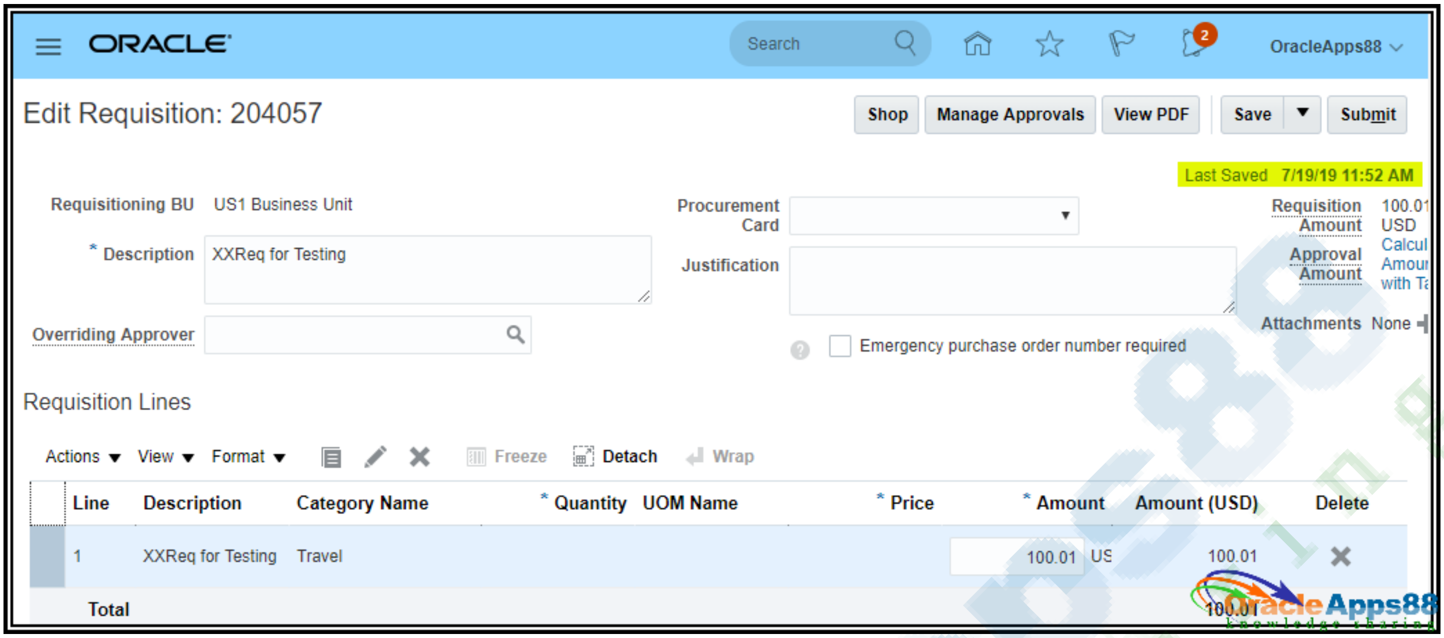
30. In the [Advanced] Search window:
    A. Select the **Description** operator of **Does <u>not</u> contain**
    B. Type any random text
    C. Click the **Search** button (All of the available values will be displayed
    D. Select the applicable value from the list by clicking the line
    E. Click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

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

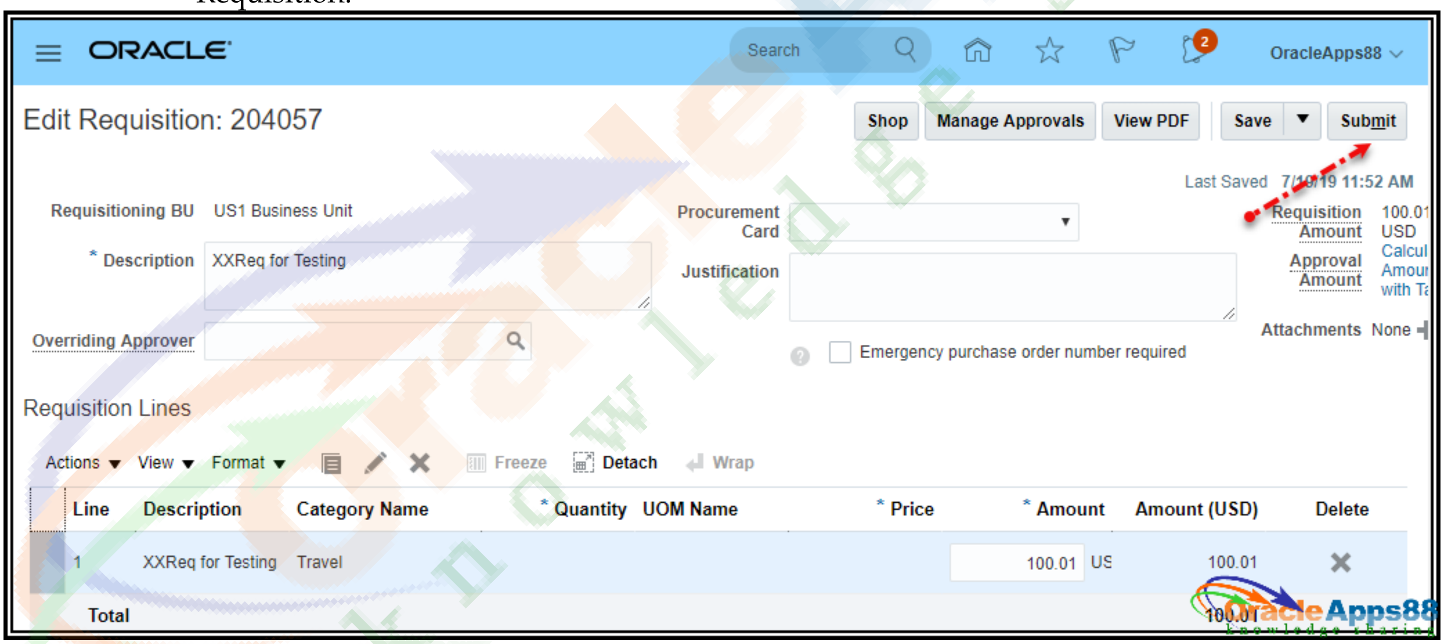
32. Populate/select the **Task Number**, **Expenditure Item Date**, **Expenditure Type** (must match the **Category**) and the **Expenditure Organization** (the Organization that will carry the cost).
    i. Note: Type the value within the applicable field or click the dropdown to view the list of values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



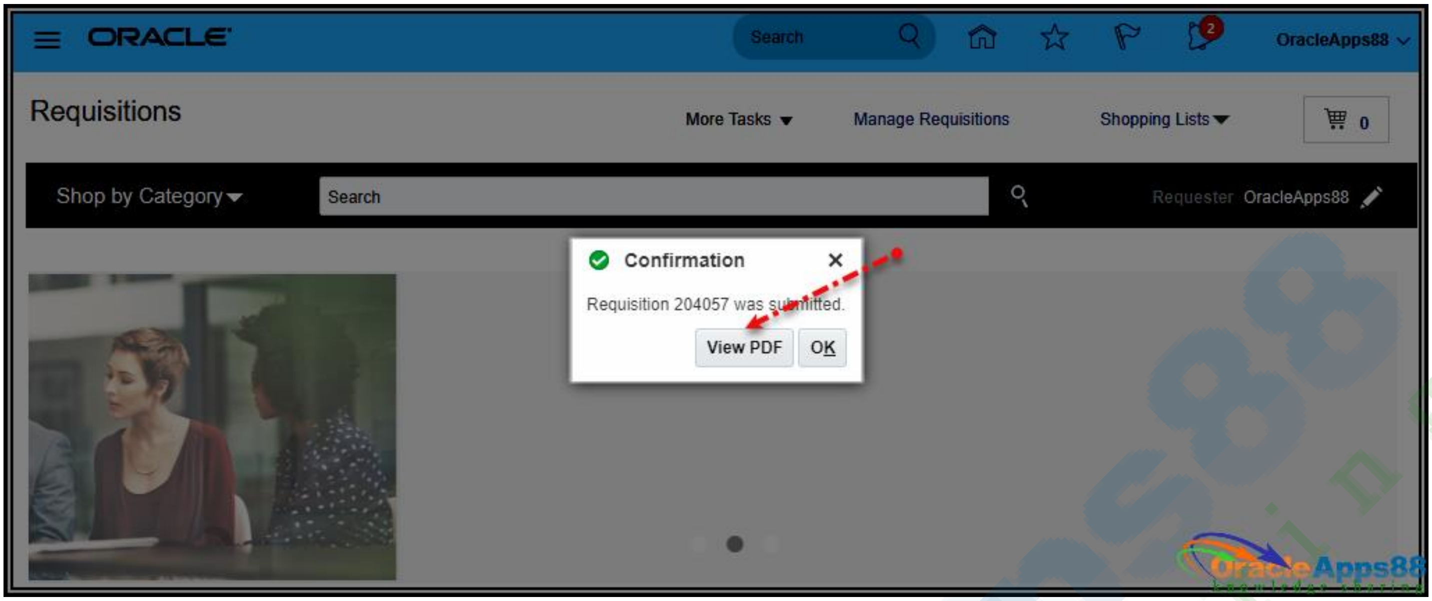

33. After the Requisition is saved, the Timestamp of when it was last saved is displayed.




34. 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.




35. 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.




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

37. 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
**Entered By** OracleApps88
**Status** Approved
**Description** XXReq for Testing

**Requisition Amount** 100.01 USD
**Approval Amount** 109.26 USD
**Procurement Card**
**Justification**

**Lines**

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

**Requester** OracleApps88
**Urgent** No
**Requested Delivery Date** 7/22/19
**Deliver-to Location Type** Internal
**Deliver-to Location** Chicago
**Deliver-to Address** 233 South Wacker Drive, Chicago, IL 60606, Cook, United States
**Destination Type** Expense
**Subinventory**
**Note to Buyer**

**Supplier** OracleApps88
**New Supplier** No
**Supplier Site** REMIT TO
**Supplier Contact** Apps Oracle
**Contact Phone** +91 9059574321
**Supplier Item**
**Note to Supplier**
**Note to Receiver**

**Attachments**

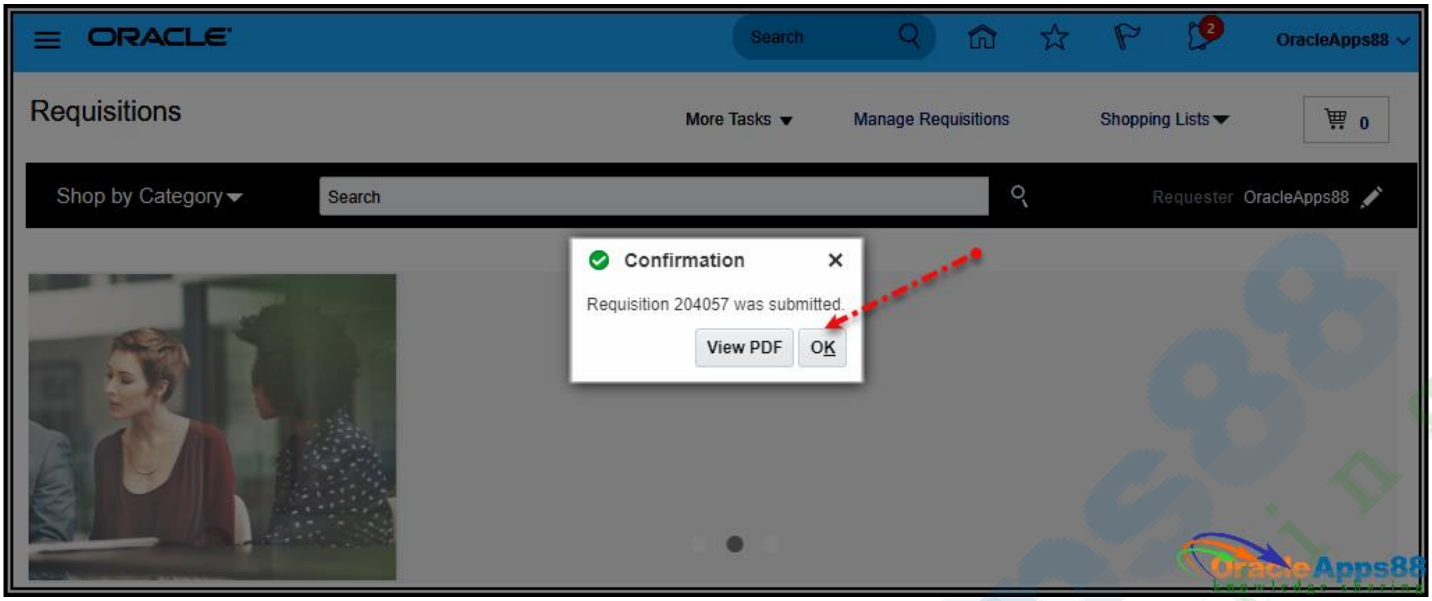
| Title | File Name or URL | Description |
|---|---|---|
| OracleApps88 | http://OracleApps88.Blogspot.com/ | Oracle Applications |

**Distributions**

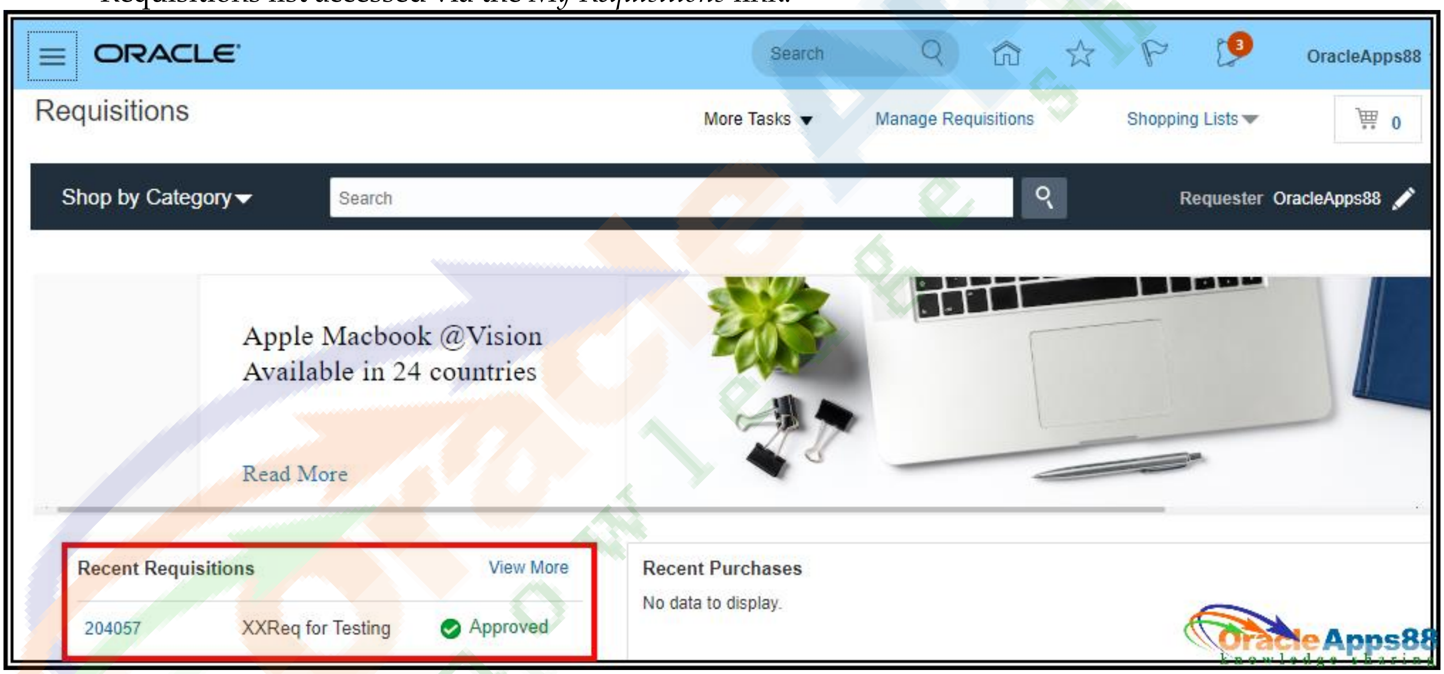
| Distribution | Charge Account | Percentage | Quantity | Amount (USD) |
|---|---|---|---|---|
| 1 | 101.10.60511.000.000.000 | 100 | 0 | 100.01 |

**End of Report**

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




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




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

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

42. 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.

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

```
SELECT
  TO_CHAR (prha.approved_date, 'MM-DD-YYYY HH24:mi:ss') AS approved_on_date,
  prla.quantity_cancelled AS cancelled_line_qty,
  TO_CHAR (prla.req_bu_id) AS bu_key,
  TO_CHAR (prla.destination_organization_id) AS org_id,
  TO_CHAR (prla.po_line_id) AS po_line_id,
  NVL (TO_CHAR (prla.deliver_to_cust_id), '0') AS deliver_to_cust_id,
  prla.destination_type_code AS destination_type_code,
  prla.item_source AS item_source,
  NVL (prla.suggested_supplier_item_number, 0) AS suggested_supplier_item_num,
  NVL (prla.suggested_vendor_name, '-') AS suggested_vendor_name,
  prla.line_status AS line_status,
  (CASE
      WHEN prla.matching_basis = 'AMOUNT' THEN prla.amount
      ELSE prla.quantity * prla.unit_price
   END) AS line_amt,
  TO_CHAR (prla.requested_ship_date, 'MM-DD-YYYY HH24:mi:ss') AS
requested_ship_date,
  TO_CHAR (prla.last_approval_date, 'MM-DD-YYYY HH24:mi:ss') AS
last_approval_date,
  TO_CHAR (prla.cancel_date, 'MM-DD-YYYY HH24:mi:ss') AS cancel_date,
  TO_CHAR (prla.last_submitted_date, 'MM-DD-YYYY HH24:mi:ss') AS
last_submitted_date,
  prla.item_description AS line_text,
  prla.rate AS loc_exchange_rate,
  prla.uom_code AS primary_uom_code,
  prla.line_number AS purch_line_num,
  prha.requisition_number AS purch_rqstn_num,
  prla.quantity AS requested_qty,
  NVL (prla.currency_unit_price, prla.unit_price) AS unit_price,
  prla.secondary_uom_code AS uom_code,
  prla.urgent_flag AS urgent_flg,
  prha.document_status AS document_status,
  TO_NUMBER (TO_CHAR (prha.approved_date, 'YYYYMMDD')) AS approved_on_dt_key,
  TO_NUMBER (TO_CHAR (prla.need_by_date, 'YYYYMMDD')) AS needed_by_date_key,
  TO_CHAR (prla.destination_organization_id) AS operating_unit_org_key,
  TO_NUMBER (TO_CHAR (prha.creation_date, 'YYYYMMDD')) AS ordered_on_dt_key,
```

```
  TO_CHAR (prla.item_id) AS item_key,
  TO_NUMBER (NULL) AS received_on_dt_key,
  TO_CHAR (prla.requester_id) AS requestor_key,
  TO_CHAR (prla.destination_organization_id) AS rqstn_org_key,
  TO_CHAR (prla.vendor_site_id) AS supplier_account_key,
  TO_CHAR (NVL (pov.party_id, prla.vendor_id)) AS supplier_key,
  TO_CHAR (prla.item_id) AS supplier_prod_key,
  'Purchase Requisition' || '~' || prla.order_type_lookup_code AS req_type_key,
  TO_CHAR (prha.creation_date, 'MM-DD-YYYY HH24:mi:ss') AS
req_line_creation_date,
  prla.quantity AS ordered_qty,
  (prla.unit_price * prla.quantity) AS amount_ordered,
  pda.distribution_amount AS distribution_amt,
  NVL (pda.distribution_quantity, 0) AS distribution_qty,
  pda.nonrecoverable_tax AS nonrecoverable_tax,
  pda.recoverable_tax AS recoverable_tax,
  fnd.username AS line_last_updated_by,
  fnd_c.username AS line_created_by,
  TO_CHAR (prha.submission_date, 'MM-DD-YYYY HH24:mi:ss') AS
header_submission_date
FROM
  por_requisition_headers_all prha,
  por_requisition_lines_all prla,
  po_line_locations_all polla,
  gl_code_combinations glcc,
  por_req_distributions_all pda,
  per_users fnd,
  per_users fnd_c,
  poz_suppliers pov
WHERE 1=1
  AND prla.requisition_header_id = prha.requisition_header_id(+)
  AND prla.requisition_line_id(+) = pda.requisition_line_id
  AND pda.code_combination_id = glcc.code_combination_id
  AND TO_CHAR (fnd.user_id(+)) = prla.last_updated_by
  AND TO_CHAR (fnd_c.user_id(+)) = prla.created_by
  AND pov.vendor_id(+) = prla.vendor_id
```