Rochester Institute of Technology

Oracle Training: Preparing Requisitions in the Oracle Applications

Summary of Steps

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Introduction

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Employees who perform purchasing functions are able to create requisitions on-line in the Oracle Purchasing Applications. In addition, employees can forward their requisitions for approval, view their requisitions on-line and search for related documents.

Objectives:
Using this summary as a refresher, you will be able to use the Oracle Purchasing application to:

- Create and forward a requisition for approval
- Find a requisition that is already in the database
- View the Action History of a requisition
- Check for funds availability for a requisition
- Modify a requisition
- Delete a requisition
- Cancel a requisition or a requisition line
- Create and print a report

Advantages of the Oracle Requisition Applications

Some of the benefits of the on-line system include:

- Efficient – no need to fill out manual forms and then mail them to Purchasing
- Timely – Your requisition can be approved and forwarded to Purchasing in one day
- Accurate – You will be able to send your requisition to the correct approver every time

A. Summary of Steps to Create a Requisition – Lines portion:

1. Access Oracle Applications.
2. Select Requisitions on the Navigator – RIT – Purchasing Requestor screen.
3. Create preferences as needed.
4. Place the cursor in the Category Field and click once.
5. Select the LOV to display the Category dialog box.
6. In the Category dialog box, select the LOV.
7. Click on the item to request and click OK.
8. In the Category dialog box, with the cursor in the second Subcategory field (it should be there already), select the LOV again.
9. Click to choose the Subcategory Item and click on OK.
10. Both Category fields in the dialog box should be completed. Click OK.
11. Place the cursor in the Description field and type in the description of the item being requested. Tab to the Unit if Measure field.
12. Verify that the Unit of Measure is correct. (Use the LOV to change the unit of measure is necessary.)
13. In the Quantity field, enter the number of items being requested. Tab to the Price field.
14. In the Price field, enter the unit price of the item being requested.
15. Place the cursor in the Need-by field (optional field).
16. Select the LOV.
17. Double-click on the calendar date that the item is needed by.
18. Complete any optional information in the Source Details screen by typing in the information.
19. If necessary, complete any optional information in the Details screen by clicking in the UN number and Hazard field and selecting the appropriate entries using the LOV.

B. Summary of Steps to Create a Requisition – Additional Line Details portion:

1. Place the cursor in the supplier field in the lower third of the Requisition (RIT)-(New) screen.
2. Select the LOV for the drop down menu.
3. Double-click the appropriate option fro the LOV to choose the Supplier.
4. If the cursor has not already advanced to the Site field, place the cursor in the next blank field.
5. Select the LOV drop down menu in the right side of the field.
6. Double-click the appropriate site for the Supplier.
7. Repeat steps 4-6 for each remaining blank fields in the additional line details section on the bottom of the Requisitions (RIT)-(New) screen.
8. When all the fields are completed, click on the Save icon in the Toolbar to establish a requisition number in the Number field at the top left.

C. Summary of Steps to Create a Requisition – Distribution portion:

1. Click the Distributions button on the bottom of the Requisitions(RIT)-(New) screen once.
2. Place the cursor in the Charge Account field.
3. If the charge number is known, type it in the field and press Enter.
4. If the charge account is not known, click on the LOV drop down menu.
5. In the charge account dialog box, enter the appropriate information in the blank fields. When done, click the OK button once.
6. Save the requisition by clicking the Save icon in the Toolbar.

D. Summary of Steps to Create a Requisition – Forward for Approval portion:

1. Click the Approve button on the Requisition (RIT) – (New) screen.
2. Click once in the check box beside the word Forward.
3. If forwarding information has not been automatically entered by the computer, of if the forwarding information needs to be changed, place the cursor in the Approval Path field.
4. If the path is known, type it in and press Enter.
5. If the path is not known, type % in the Approval Path field and press Enter. This brings up the approval hierarchy list.
6. Double-click on the appropriate hierarchy from the list.
7. Click on the OK button.
8. A note dialog box appears. Click on OK.
9. Steps 3-8 can also be repeated to change the Forward To field

Summary of Steps to Find a Requisition:

To Find a Specific Requisition:

1. Double-click on Requisition Summary from the Navigator-RIT-Purchasing Requestor screen.
2. Place the cursor in the Requisition Number field and enter the requisition number.
3. Click on the Find button at the bottom of the screen.

To Find All Requisitions by a Preparer:

1. Double-click on Requisition Summary from the Navigator-RIT-Purchasing Requestor screen.
2. Do not enter a requisition number.
3. Click the find button at the bottom of the screen.

To View Headers, Lines, or Distributions of a Requisition:

1. Double-click on Requisition Summary from the Navigator-RIT-Purchasing Requestor screen.
2. Select Headers, lines, or Distributions from the Results box in the lower right corner of the Find Requisitions (RIT) screen.

   a. If Headers is chosen, the Requisition Header screen appears. The status of the Requisition can be viewed from this screen.
   b. If Lines is chosen, the Requisition Lines Summary screen is displayed. Once a purchase order number is issued for a requisition, it can be viewed in this window under Order Number.
   c. If Distributions is selected from the Results box, the Requisition Distributions Summary screen appears.

Summary of Steps to View Action History:

1. Double-click on Requisition Summary from the Navigator-RIT-Purchsing Requestor screen.
2. Choose Headers in Results box located in the lower right had corner of the find Requisition (RIT) screen.
3. Click the find button at the bottom of the screen.
4. Place the cursor in the field directly to the left of the requisition needed.
5. Select Tools from the Tool bar.
6. Click View Action History from the drop down menu.

Summary of Steps to Check Funds Availability:

1. Click Tools on the menu bar located on the Requisition (RIT)-(New) screen.
2. Select Check Funds from the drop down menu.
3. A note dialog box appears. Click on OK.

Summary of Steps to Modify a Requisition

1. Double-click on Notifications on the Navigator (RIT) Purchasing Requisition screen.
2. Place the cursor in the Number field of the requisition to be modified.
3. Click on the Open button located at the bottom of the screen.
4. Make necessary changes to the rejected requisition, (e.g. Quantity, price.)
5. Save the changes.
6. Click the "Approve" button located at the bottom of the screen.
7. Return the requisition for Approval (See Create a Requisition-Forward for Approval.)

Summary of Steps to Delete a Requisition:

1. Double-click on Requisition Summary from the Navigator-RIT-Purchasing Requestor screen.
2. Click on Headers in the Results box located in the lower corner of the Find Requisitions (RIT) screen.
3. Click on the Find button.
4. Place the cursor in the Number field of the appropriate requisition number.
5. Click the Open button.
6. Select Edit from the Toolbar, select Delete from the drop down menu.
7. Save your changes by using the Save icon on the Toolbar.

Summary of Steps to Cancel a Requisition:

1. Double-click Requisition Summary from the Navigator-RIT-Purchasing Requestor menu.
2. Click on Headers in the Results box located in the lower right corner of the Find Requisitions (RIT) screen.
3. Place the cursor in the number field to select the appropriate requisition number.
4. Choose Tools from the menu.
5. Click on Control from the drop down menu.
6. In the Actions box, click Cancel Requisition.
7. Click on OK.
8. Click OK on Caution dialog box.
9. Click OK on the Note dialog box.

To verify that the requisition has been cancelled,

1. Return to the Navigator-RIT-Purchasing Requestor screen.
2. Double-click on Requisition Summary.
3. From the find Requisition (RIT) screen, choose Headers in the Results box.
4. The Status field should read Cancelled.

Summary of Steps to Run/Print a Report:

1. Double-click Reports from the Navigator-RIT-Purchasing Requestor menu.
2. Double-click on Run
3. Place the cursor in the Name field located in the upper right corner of the Submit Requests screen.
4. To view a list of report options, click on the List of Values icon located in the Toolbar.
5. Highlight the appropriate report and click on OK.
6. Click on options and change the 0 in the Copies field to 1 to print a copy of your report and select your printer from the List of Values.
7. Click on the Submit button to run the report and print a copy.