Creating a Purchase Requisition in Oracle

Double click on the Oracle icon in your application's menu and then change the web browser from app1 to app 3 for Testing ONLY.

Login with your regular Oracle Username and Password.

Your menu has a new addition called Devereux Purchasing Requester, click on it.

There are several options that you have as a purchasing requester, but right now we are going to be focusing on Requisitions, click on it.
Above is the screen that you should see to begin creating your purchase requisition. You will notice that some fields are white and some are peach. Those that are peach are required fields and those in white are not.

**Number:** Will be automatically filled in for you once the PR has been generated  
**Description:** Can be whatever you would like to enter that describes the purchase  
**Type:** Will always be Purchase Requisition when creating a PR  
**Status:** Will show as incomplete until the PR has been completed  
**Preparer:** Is you  
**Total:** Will always be in USD unless we are purchasing in another currency and will be automatically filled in when you complete the “Currency” tab

Above, you will notice that the “Lines” tab has a field called “Num” which refers to each line item that you enter in the PR. When you click into the “Type” field, you are presented with 4 different “Line Types” to choose from (pictured below).
The “Item” field allows you to choose what you are purchasing out of a list of previously setup items by Devereux.

We currently do not have any items set up in the system, so just select the Category and fill in the description of items requested.

The following example is for goods. If you select Services, the price will default to 1 and you will enter the Quantity as the dollar amount.
The Requester fills in the “Quantity” to be purchased and the “Price” field automatically fills in based on the cost when the same item had been previously purchased. If there is a certain date that you need to have the item by, please fill in the “Need-By” date. The rest of the fields in this tab are automatically populated. Please note that if you plan on purchasing more than one item from a particular vendor, you must go through all the steps for the first item prior to moving on to the second item.
The “Source Details” tab has a field called “Note to Buyer” where you can provide additional information to the person who will be making the purchase. When you click into the “Buyer” field and type in %, you are given choices of who will be making the purchase (please see below for example). The “Supplier Item” field is where you put in the supplier’s product information (ex. the supplier’s item number that is associated with the item).

The “Details” tab allows you to check off “Urgent” if there is the need for a rush on the order. Additionally, you can provide a justification for the purchase/urgency, a note to the receiver, the transaction nature and a reference number (pictured below).
If completed in the order outlined above, the “Destination Type,” “Requester” and “Organization” fields should all be populated already. When you click on the “Location” field and type in a %, you get a list of all Devereux locations like the one below. Your personal assigned Organization will pre-fill.

### Deliver To Locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>140-100 Senuardi Cr</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-101 Senuardi Cr</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-1325 Ship Rd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-1338 Paoli Pk</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-2012 Renaissance Blvd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-225 Corwen Ter</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-261 E Boot Rd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-270 E Boot Rd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-271 E Boot Rd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-281 E Boot Rd</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-3 Jacqueline Dr</td>
<td>Devereux Foundation Kenner</td>
</tr>
<tr>
<td>140-300 Willowbrook Ln</td>
<td>Devereux Foundation Kenner</td>
</tr>
</tbody>
</table>

Once you choose a location, the “Source” field automatically populates. When you click into the “Supplier” field, you get a full list of Suppliers (pictured below) and once you choose the appropriate supplier, the “Site,” can be filled in, or you can leave it for the Buyer to complete.

### Suppliers

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Number</th>
<th>On Hold</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALPHAGRAPHICS</td>
<td>65163</td>
<td></td>
</tr>
<tr>
<td>BANK OF AMERICA</td>
<td>68887</td>
<td></td>
</tr>
<tr>
<td>BORIS, MRS</td>
<td>66518</td>
<td></td>
</tr>
</tbody>
</table>
Now, click on “Distributions at the bottom of the screen. This will take you to the screen shown below.

The “Quantity” field should fill automatically, but when you click on the “Charge Account” field, the system will default your assignment information and the expense account for the category selected. You can change the values if needed.
Click on the yellow diskette to save the PR and then click on “Approve” at the bottom of the form.

Once you’ve clicked on “Approve,” you can choose to forward the PR on to another person, add a note, print, etc. When you are done with this screen, click “OK” and you are done.
Requisition Summary

From The Navigator Window, Select Requisition Summary

From this window you can enter any of the fields to find your requisitions. For this example, I will fill in my name as the Requestor.
Then click on the Status tab and select the Approval in Process and click the **Find** Button.

You will see a list of all Requisitions in Process. Click on the Lines Button to see the detail lines of the requisition.
Click on the Distributions Button to see the distributions.

From the Requisitions Headers Summary Window above, click on the menu called Tools and select View Action History like below.
You will then be able to see the status and who is next in line to approve the requisition.
Notifications Summary

From The Navigator Window, Select Notifications Summary

You will receive emails when your requests have been approved and you will also be able to see the notifications here on your worklist.
**Attaching a Document to the Requisition**

Here you will see a Purchase Requisition for a new Calendar. On the description, I put see attached order form. I also added it as a note to the Buyer and put the Supplier item number on the Source Details Tab. Click on the Paperclip icon.
The sequence number will fill in. Select a category from the list. I selected To Buyer.

You can enter a description if you want and select a Data Type. For this example, I am uploading a file.
You will then see a window where you can browse for your file and click the OK button.

You will then get a confirmation message that your file was uploaded. Close this window,

File upload completed successfully.

* Please close the web browser.

* Return to the Attachments form and click the Yes button to indicate file upload is complete.
Click on the Yes button to confirm that the upload completed.

Click on your line and you will see a yellow symbol in your paperclip, which designates that a document is attached.

To View the Document, click on the paperclip and select open document.
Cancel a Purchase Requisition