



IACS Oracle Up-gradation – Requisition

User Manual

Version: 1.0

ORACLE®

1 Introduction

1.1 Document Structure

This document describes step by step procedure to be followed for Purchase Requisition process of IACS in Oracle Applications. The document is organized in the following manner:

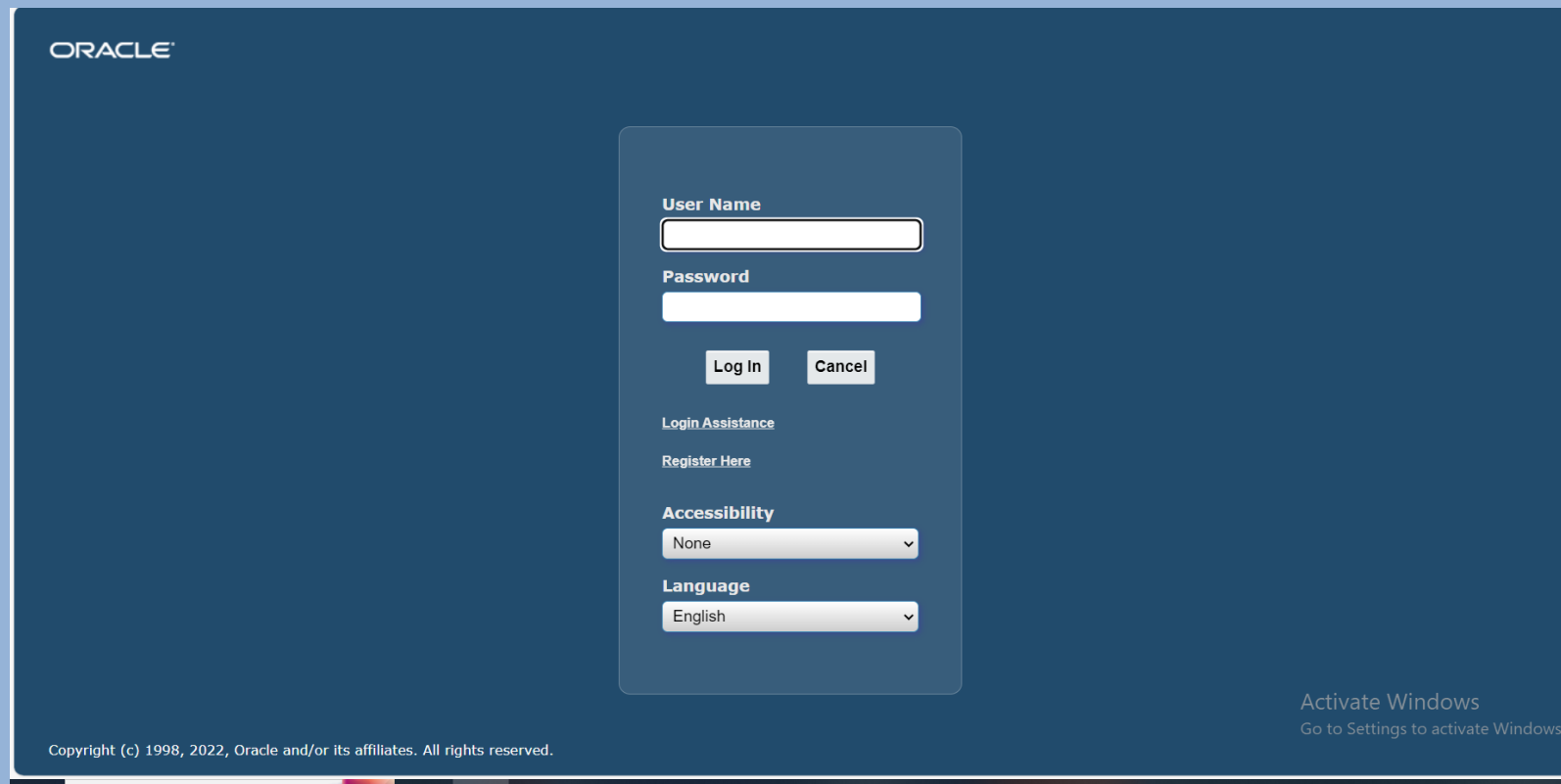
Section 1 covers the document structure along with key business processes of Purchase Requisition

Section 2 covers the details of key business process flows in Oracle.

1.2 Key Business Processes

SL.	BUSINESS SCENARIOS	DESCRIPTION
1.	Purchase Requisition	
1.1	Log In and Open Responsibility	How to login and Open the Requisition Form
1.2	Creation of Purchase Requisition	Create a new Purchase Requisition.
1.3	Approve Requisition	Approval of Requisition
1.4	Reject Requisition	Rejection of requisition.
1.5	Reassign Requisition	Process of delegating the approval authority.
1.6	Request Information	Process of required information to any person.

Step 1: Log In using User Id & Password

The image shows the Oracle login interface. It features a dark blue background with the Oracle logo in the top left corner. In the center, there is a light blue rounded rectangle containing the login fields. The 'User Name' field is a white text box with a thin border. Below it is the 'Password' field, which is a white text box with a thin border. Under the password field are two buttons: 'Log In' and 'Cancel'. Below these buttons are two links: 'Login Assistance' and 'Register Here'. Further down are two dropdown menus: 'Accessibility' with 'None' selected and 'Language' with 'English' selected. At the bottom left of the login area, there is a copyright notice: 'Copyright (c) 1998, 2022, Oracle and/or its affiliates. All rights reserved.' At the bottom right, there is a Windows activation watermark that says 'Activate Windows' and 'Go to Settings to activate Windows.'

ORACLE

User Name

Password

Log In Cancel

[Login Assistance](#)

[Register Here](#)

Accessibility

None

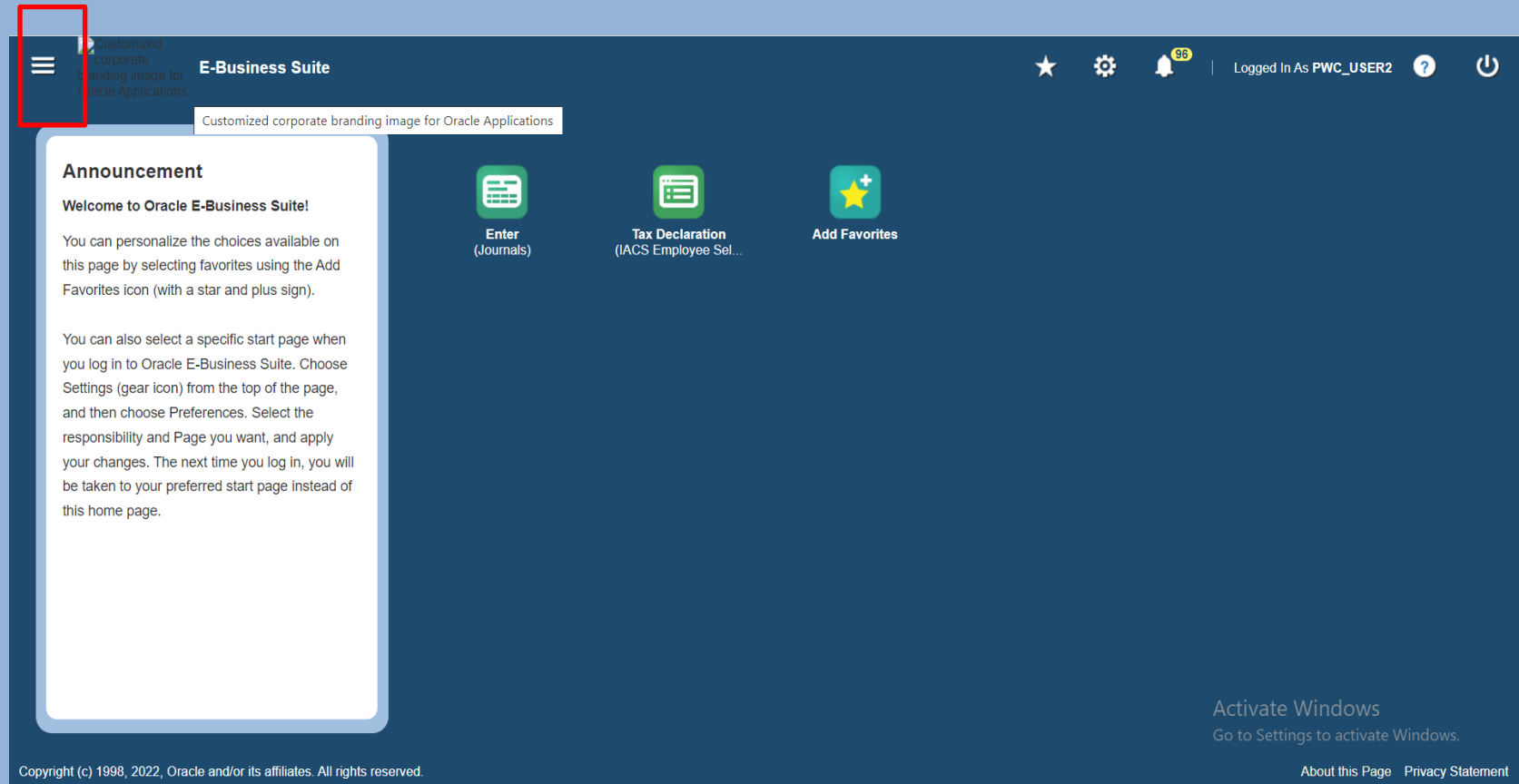
Language

English

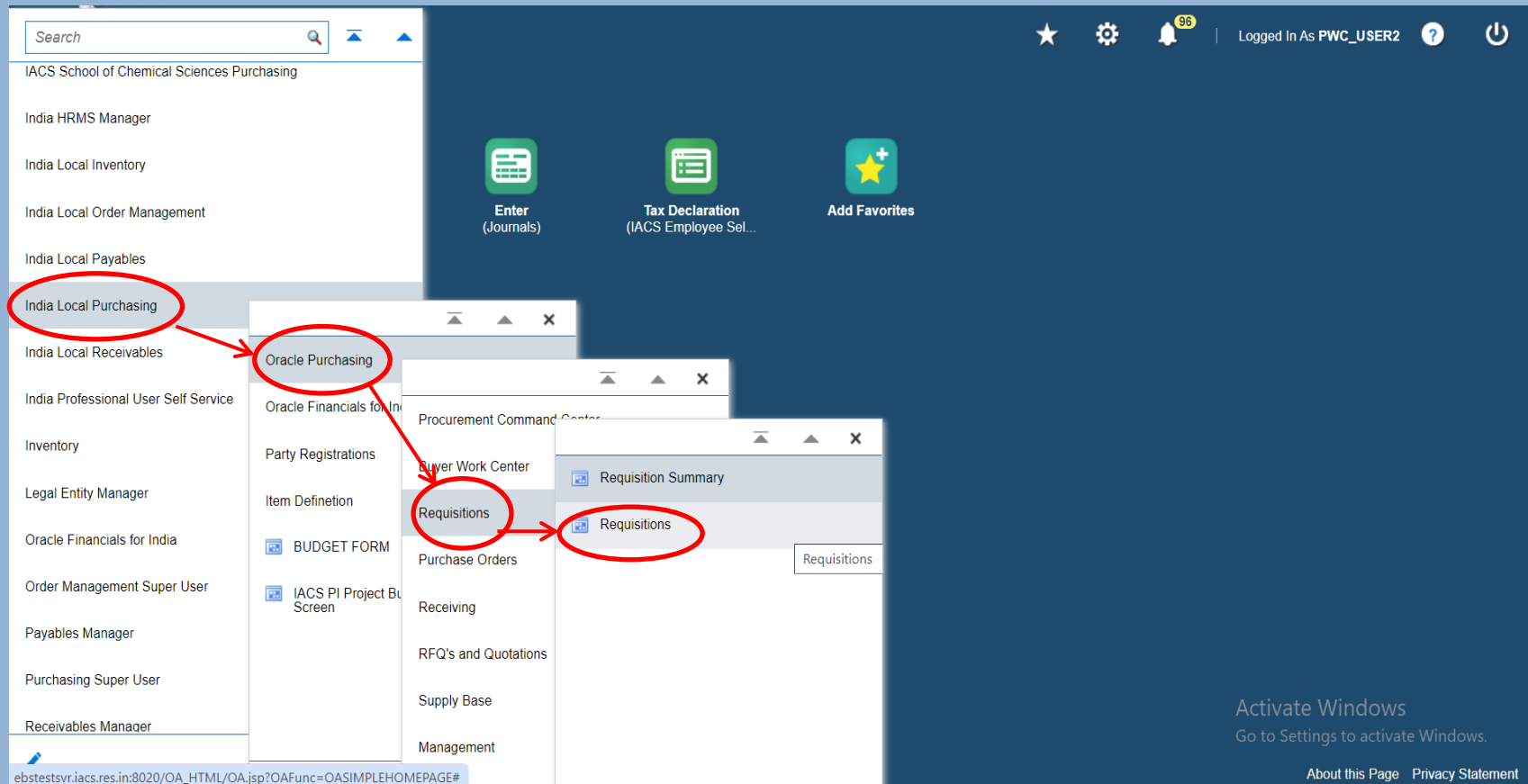
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Activate Windows
Go to Settings to activate Windows.

Step 2 : Click On the Three Lines on the Top Left



Step 3: Go to the India Local Purchasing -> Oracle Purchasing -> Requisition -> Requisition



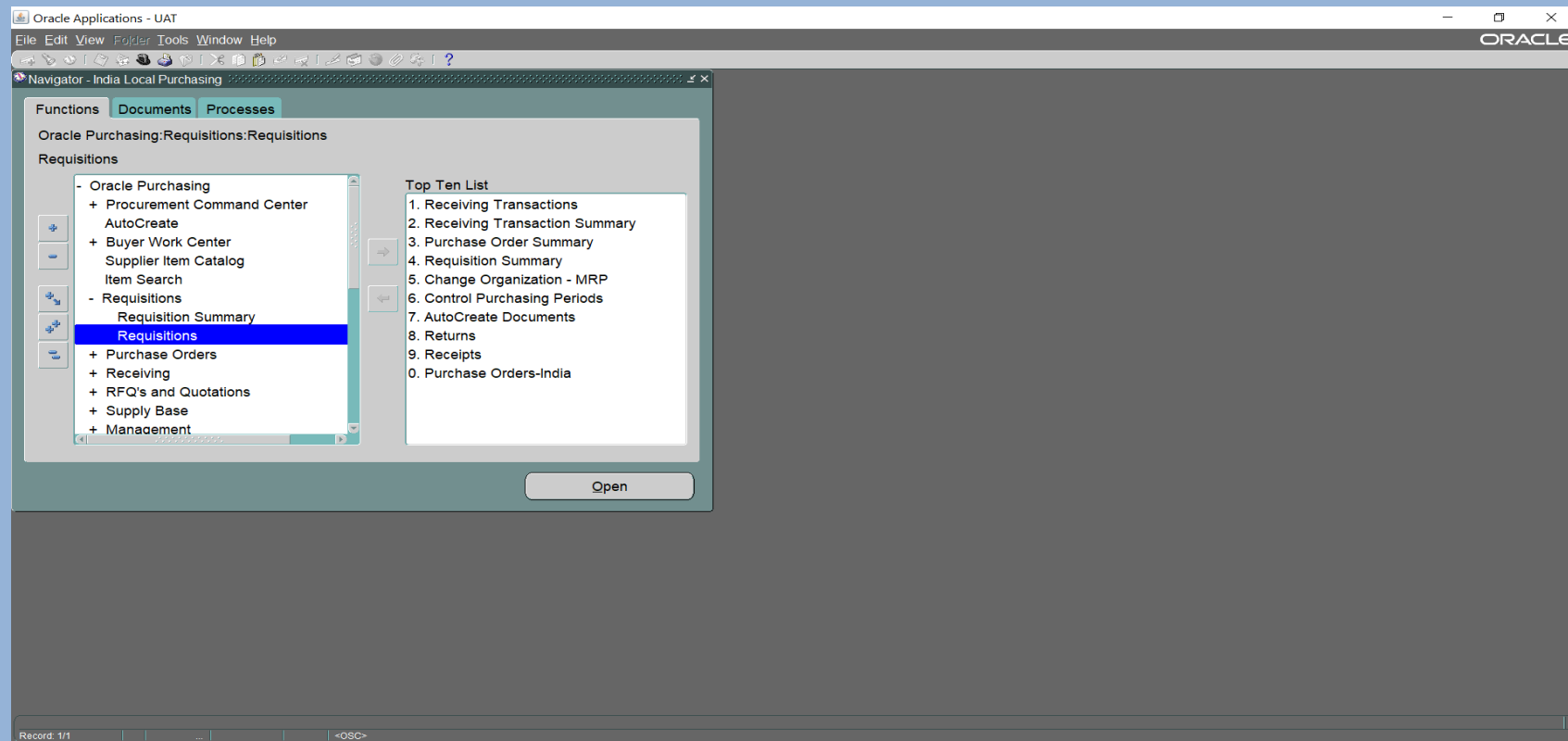
2 Purchase Requisition

2.1 Creation of Purchase Requisition

Screen: Purchase Requisition Screen

Purpose: To create a new Purchase Requisition.

Navigation: Purchasing Responsibility (India local Purchasing) -> Oracle Purchasing ->Requisitions ->Requisitions



Step 1: Under the “Lines” tab, click on “Type”. Default will be “Goods”. In case of Services/Contracting, select the needful from the LOV.

Step 2: In the “Item” field, select the Item Code from the LOV. On selecting the Item Code, the “Description”, “Category” and “UOM” will default from the Item Master. In case of Services, choose the Line Type as “Services”.

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Operating Unit IACS Corporate OU (NE)

Number Type Purchase Requ Preparer Abhra Paul

Description Requisition Status Incomplete Total INR 100,000.00

Lines Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	Numb
1	Goods	1000113		Purchased Items.	COMPUTER PERIPHEI	Numb	1

Line Type can Be "Goods"/"Services"

Destination Type Expense

Requester Abhra Paul

Organization Administration

Location Administration Common

Subinventory

Source Supplier

Supplier

Site

Contact

Phone

Outside Services Catalog... Distributions Approve...

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Operating Unit: IACS Corporate OU (NE)

Number: Type: Purchase Requisition Preparer: Abhra Paul

Description: Requisition Status: Incomplete Total: INR 100,000.00

Lines Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	UOM Numb
1	Goods	1000113		Purchased Items.	COMPUTER PERIPHE		1

Item Code is selected from LOV

Item Category will be defaulted from Item Master on giving the Item Code

Item Description and UOM will be defaulted as well

Destination Type: Expense

Requester: Abhra Paul

Organization: Administration

Location: Administration Common

Subinventory:

Source: Supplier

Supplier:

Site:

Contact:

Phone:

Outside Services Catalog... Distributions Approve...

Step 3: Enter the number of goods required in the “Quantity” field. Enter the estimated price of each item in the “Price field”
Under the “Need-by-date” field enter the envisaged date by which the goods/services will be required.

Step 4: In the “Distributions” under the “Accounts” tab, the Charge Account is automatically generated on clicking on it.

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Operating Unit IACS Corporate OU (NE)

Number

Description Requisition

Type Purchase Requ

Status Incomplete

Preparer Abhra Paul

Total INR 100,000.00

[A]

Lines Source Details Details Currency

Num	UOM	Quantity	Price	Need-By	Amount	Charge Account
1	Numb	10	10000	25-APR-2024 00:00	100,000.00	

Enter Quantity and Rate

Enter the Need By Date

Destination Type Expense

Requester Abhra Paul

Organization Administration

Location Administration Common

Subinventory

Source Supplier

Supplier

Site

Contact

Phone

Outside Services Catalog... Distributions Approve...

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Distributions - [New]

Accounts Project

Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1	10	010.2601.00000.4040101.000		05-APR-2024	010.2601.00000.4040

Enter The Combination Required and Save.

Account Description

Charge IACS Corporate.Administration Common Budget IACS Corporate.Administration Common

Accrual IACS Corporate.No Department.No Project Variance IACS Corporate.Administration Common

Organization Administration

Location Administration Common

Subinventory

Contact

Phone

Outside Services Catalog... Distributions Approve...

Step 5: In the Requisition Header, the Requisition Number will be auto generated on saving in the “Number” field.

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Operating Unit: IACS Corporate OU (NE)

Number: 2350000126

Type: Purchase Requisition

Preparer: Abhra Paul

Description: Requisition

Status: Incomplete

Total: INR 100,000.00

[A]

Lines Source Details Details Currencies

The auto generated Charge Account on saving

Num	UOM	Quantity	Price	Need-By	Amount	Charge Account	[]
1	Numb	10	10000	25-APR-2024 00:00	100,000.00	010.2601.00000.4	

Destination Type: Expense

Requester: Abhra Paul

Organization: Administration

Location: Administration Common

Subinventory:

Source: Supplier

Supplier:

Site:

Contact:

Phone:

Outside Services Catalog... Distributions Approve...

Step 1: Query the Requisition from the Requisition Summary and Click on “Approve”
 Before Approve the requisition go to Tools and click on check fund.
 Here get message fund check or failure.

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Requisitions - [New]

Operating Unit IACS Corporate OU (NE)
 Number 2350000126 Type Purchase Requ Preparer Abhra Paul
 Description Requisition Status Incomplete Total INR 100,000.00 [A]

Lines Source Details Details Currency

Num	UOM	Quantity	Price	Need-By	Amount	Charge Account
1	I Numb	10	10000	25-APR-2024 00:00	100,000.00	010.2601.00000.4

Destination Type Expense
 Requester Abhra Paul
 Organization Administration
 Location Administration Common
 Subinventory

Source Supplier
 Supplier
 Site
 Contact
 Phone

Outside Services Catalog... Distributions Approve...

Click on approve

Step 2: Submit the Requisition for Approval. Check the Forward box. On clicking on the Approval Path and Forward To fields the names will automatically appear. Click on "OK"

Here you select the Approval Path and send to respective HOD.

Oracle Applications - UAT

File Edit View Folder Tools Actions Window Help

Approve Document - 2350000126

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
Forward From Abhra Paul
Approval Path ADMIN PURCHASE CELL H
Forward To Abhijit Basak

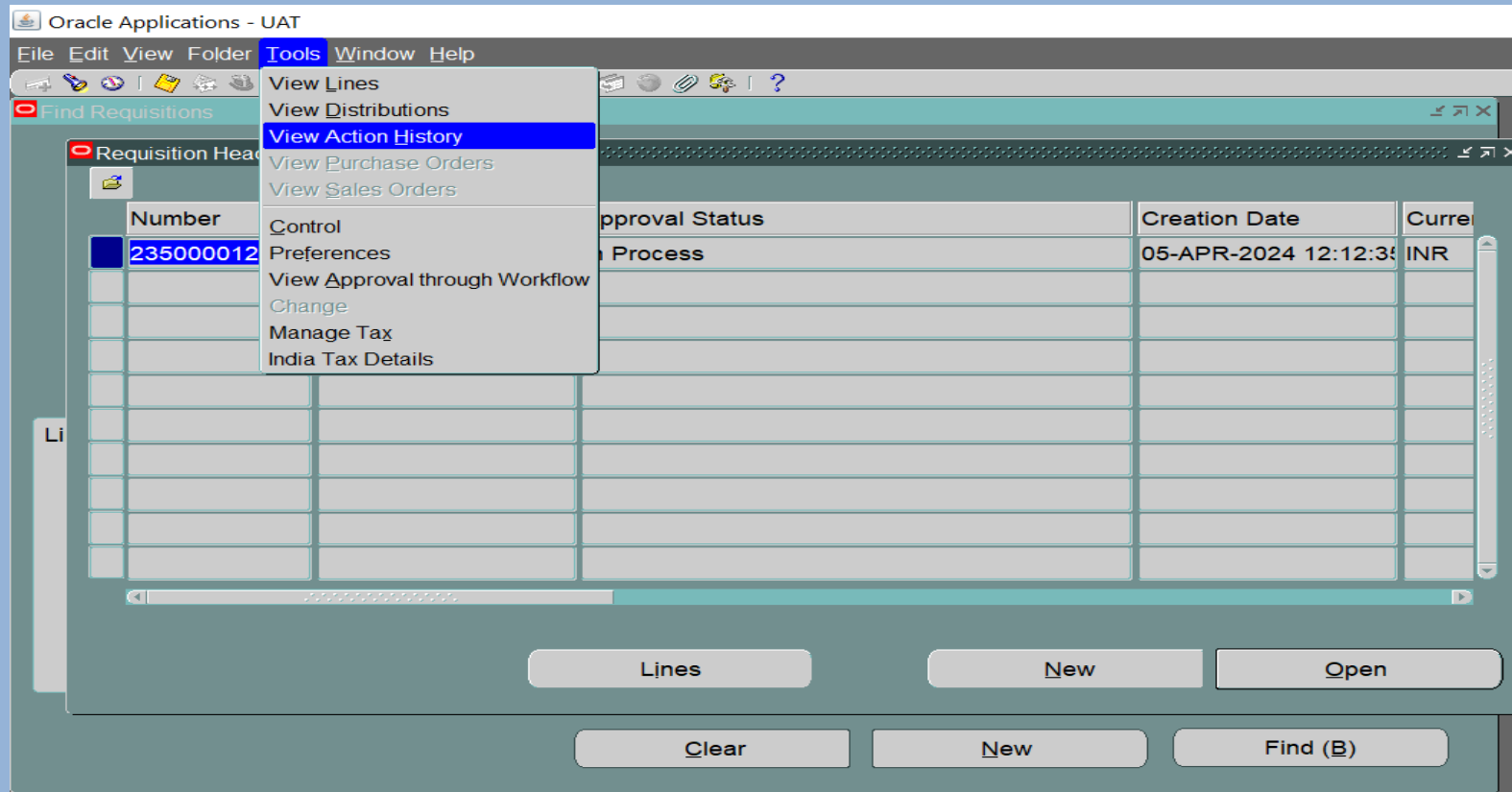
Note
Change Summary

Transmission Methods

☐ Print ☐ XML
☐ Fax FAX Number
☐ E-Mail E-Mail Address ☐ EDI

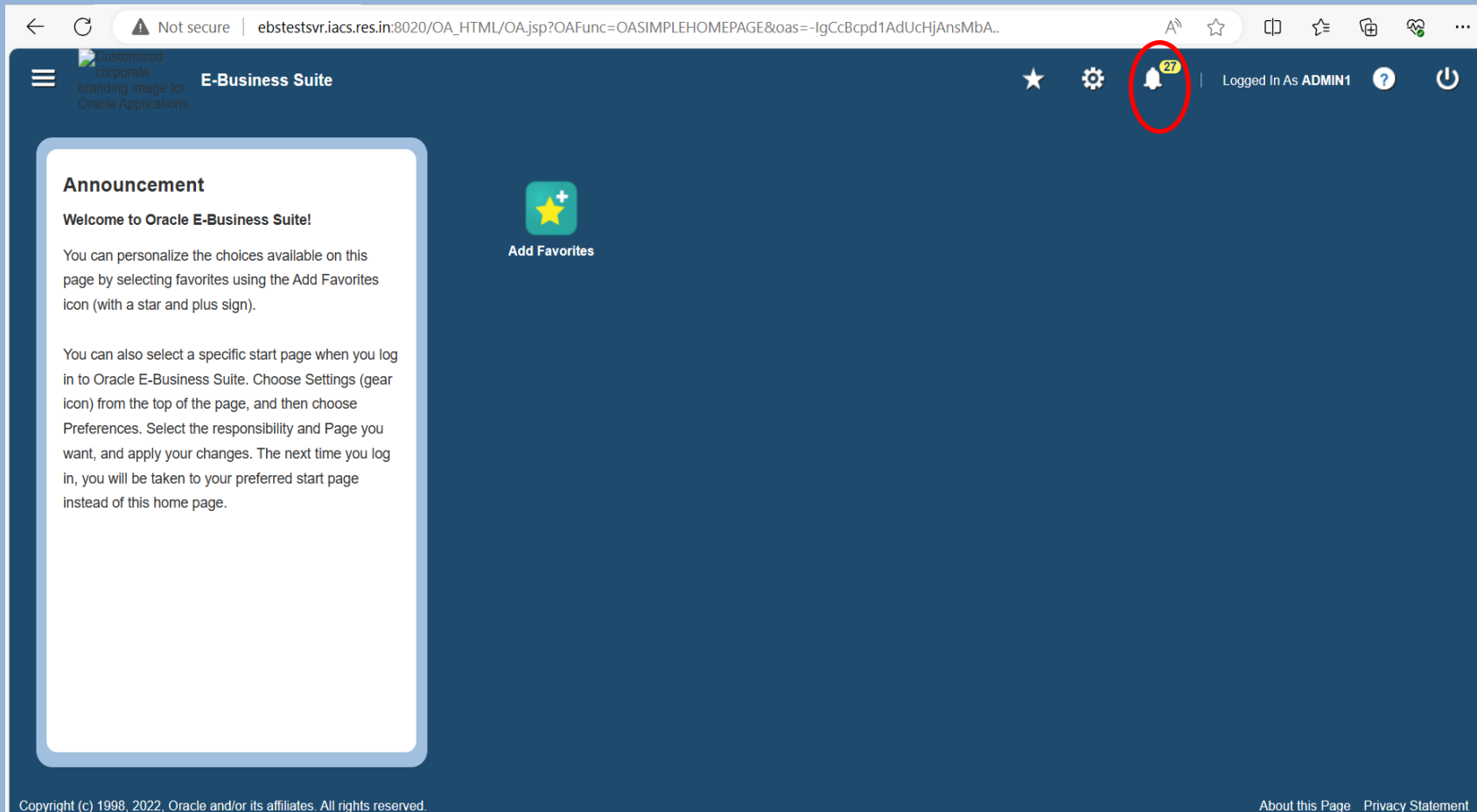
OK Cancel

Step 4 : Go to “Tools”> “View Action History” to identify the approver with whom the requisition is pending for approval. The Approval path depends on the Requisition Amount.



Step 5: The approver logs in to approve the Purchase Requisition. He opens the notification on his Work List and clicks on the “Approve” tab.

For access the work list click on the bell icon.



Click on the “Go to Full Worklist”

← ↻ ⚠ Not secure | ebtestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=OASIMPLEHOMEPAGE&oas=-lgCcBcpd1AdUcHjAnsMbA..

Customized corporate branding image for Oracle Applications | **E-Business Suite** | ★ ⚙ 27 | Logged In As ADMIN1 ? 🔌

Announcement

Welcome to Oracle E-Business Suite!

You can personalize the choices available on this page by selecting favorites using the Add Favorites icon (with a star and plus sign).

You can also select a specific start page when you log in to Oracle E-Business Suite. Choose Settings (gear icon) from the top of the page, and then choose Preferences. Select the responsibility and Page you want, and apply your changes. The next time you log in, you will be taken to your preferred start page instead of this home page.



Add Favorites

My Worklist

Paul, Abhra Purchase Requisition 2350000126 for Paul, Ab...	06:22 PM
Approve Reject	
30-Nov-2017	
Enter Requisitions	
OK	
OFFICE, DIRECTOR Purchase Requisition 1650000025 has been ap...	25-Jul-2016
OK	
OFFICE, DIRECTOR Purchase Requisition 1650000034 has been ap...	19-Jul-2016
OK	
OFFICE, DIRECTOR Standard Purchase Order IACS-G/WSSB/160...	22-Jun-2016
OK	
OFFICE, DIRECTOR Purchase Requisition 1650000014 has been ap...	16-Jun-2016
OK	
OFFICE, DIRECTOR Standard Purchase Order IACS-G/WSSB/150...	19-Mar-2016
OK	
OFFICE, DIRECTOR Standard Purchase Order IACS-G/WSSB/150...	16-Mar-2016
OK	

[Go To Full Worklist](#)

Notifications

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About this Page Privacy Statement

Click On approve button to approve the requisition.

← ↻ ⚠ Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220115&addBreadCrumb=Y&retainAM=N&ti... A ☆ 📄 ⚙️ 🔔 27 | Logged In As ADMIN1 ? ⏻

Workflow

Worklist >

Purchase Requisition 2350000126 for Paul, Abhra (100 000.00 INR)

Approve Approve And Forward Forward Reject Reassign Request Information

From Paul, Abhra Description Requisition
To ADMIN1 Requisition Total 100 000.00 INR
Sent 07-Apr-2024 18:22:00 Non-Recoverable Tax 0.00 INR (Total Tax: 0.00 INR)
ID 1220115 Attachments

Welcome to Requisition !

Preparer Name : A Nag
PI Name : Abhijit Basak

Requisition Lines

Line	Item Number	Item Description	UOM	Quantity	Unit Price	Line Amount
1	1000113	COMPUTER PERIPHERALS	Number	10	10,000	100000
			Total			100000
			Grand Total			100000

Encumbrance Details

Encumbrance and Budget Details for the period: 01-APR-2024 To 05-APR-2024

Departments	Projects	Natural Accounts	Budget	Already Spent	Order Placed	15% Extra Fund Booked	Actual Fund Available	Current Fund Available
Administration Common	No Project	Consumables	0	0	100000	0	-100000	0

Approval Sequence

Sequence Num	Who	Action	Date	Note
3	ADMIN1			
2	Abhra Paul	Submit	07-APR-2024	
1	Abhra Paul	Reserve	07-APR-2024	

References

Step 6: Similarly, further approvers will approve the requisition those who are in the approver path, and the Requisition Status changes from “In Process” to “Approved”

2.3 Reject Requisition

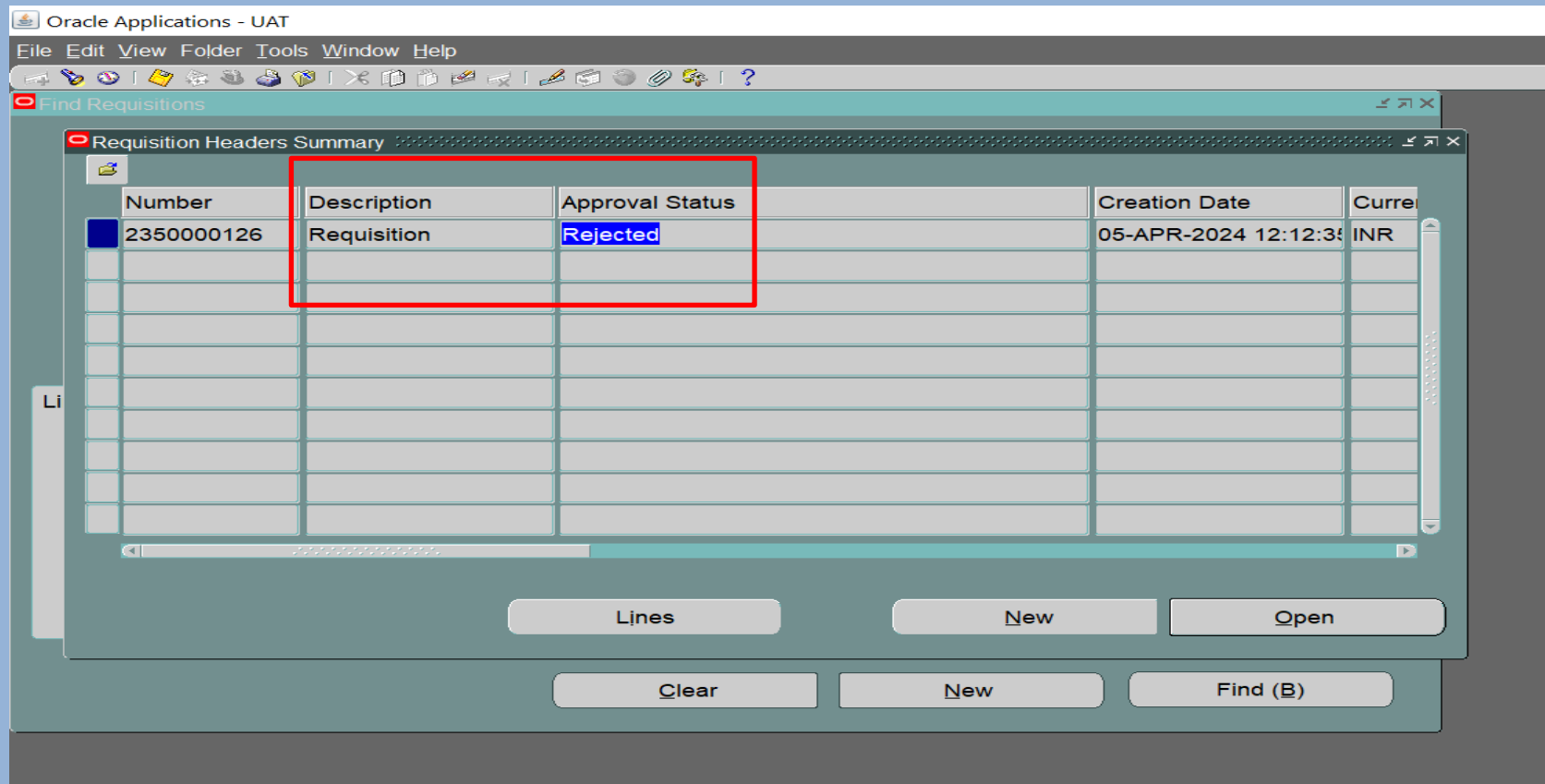
Step 1: Query the Purchase Requisition from the Requisitions Summary. The Status is “In Process” and the approver with whom it is pending is derived.

Step 2: The Approver logs in with his username and password and opens the notification on his Work List and Rejects the requisition, by clicking Reject button.

The screenshot displays the Oracle Applications - UAT interface. The main window is titled "Find Requisitions" and contains a sub-window titled "Requisition Headers Summary". Within this sub-window, a specific requisition is selected: "Purchase Requisition - 2350000126". Below the title bar, there is a table with the following columns: Seq, Date, Rev, Action, Performed By, and Note. The table contains four rows of data, with the first row (Seq 4) highlighted in blue. The "Performed By" field in the first row is highlighted with a blue border and contains the text "DIRECTOR OFFICE". The other rows show actions performed by "ADMIN1" and "Abhra Paul". At the bottom of the window, there are several buttons: "Lines", "New", "Open", "Clear", "New", and "Find (B)".

Seq	Date	Rev	Action	Performed By	Note
4				DIRECTOR OFFICE	
3	07-APR-2024 18:4		Approve	ADMIN1	
2	07-APR-2024 18:2		Submit	Abhra Paul	
1	07-APR-2024 18:1		Reserve	Abhra Paul	

Step 3: The “Approval Status” of the requisition changes to “Rejected”



2.4 Reassign Requisition

Step 1: The Approver, to whom the Purchase Order is sent to take action, might reassign the notification to someone else by clicking on “Reassign”

Notification Details

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Home Star Settings 5 Logged In As DIRECTOR OFFICE ? Power

Purchase Requisition 2350000126 for Paul, Abhra (100 000.00 INR)

Approve Approve And Forward Forward Reject **Reassign** Request Information

From Paul, Abhra

To OFFICE, DIRECTOR

Sent 07-Apr-2024 18:56:10

ID 1220118

Description Requisition

Requisition Total 100 000.00 INR

Non-Recoverable Tax 0.00 INR (Total Tax: 0.00 INR)

Attachments

Welco

Preparer Name : A Nag
PI Name : Abhjit Basak

Requisition Lines

Line	Item Number	Item Description	UOM	Quantity	Unit Price	Line Amount
1	1000113	COMPUTER PERIPHERALS	Number	10	10,000	100000
			Total			100000
			Grand Total			100000

Encumbrance Details

Encumbrance and Budget Details for the period: 01-APR-2024 To 05-APR-2024

Departments	Projects	Natural Accounts	Budget	Already Spent	Order Placed	15% Extra Fund Booked	Actual Fund Available	Current Fund Available
Administration Common	No Project	Consumables	0	0	100000	0	-100000	0

Approval Sequence

Sequence Num	Who	Action	Date	Note
7	DIRECTOR OFFICE			
6	Abhra Paul	Submit	07-APR-2024	
5	Abhra Paul	Reserve	07-APR-2024	
4	DIRECTOR OFFICE	Reject	07-APR-2024	
3	ADMIN1	Approve	07-APR-2024	
2	Abhra Paul	Submit	07-APR-2024	
1	Abhra Paul	Reserve	07-APR-2024	

Reassign Notifications

Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=WF_NTF_REASSIGN&addBreadcrumb=Y&retainAM=Y&NtfId=1220118&addB...

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Home Star Settings Notifications 5 Logged In As DIRECTOR OFFICE ? Power

Notification Details >

Reassign Notification: Purchase Requisition 2350000126 for Paul, Abhra (100 000.00 INR) [Cancel](#) [Submit](#)

* Indicates required field Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete ownership of and responsibility for that notification.

* Assignee All Employees and Users Director

☒ DOCKETED
☐ Transfer notification ownership

Comments

[Return to Worklist](#)

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Step 3: Query the requisition, in **View Action history**. It shows that the requisition is pending with the delegated person. The re-assigned person logs in , opens the notification and takes action on the requisition by clicking on “Approve”. The “Approval Status” changes to “Approved”

Oracle Applications - UAT

File Edit View Folder Tools Window Help

Find Requisitions

Requisition Headers Summary

Number

2350000126

Description

Requisition

Approval Status

Approved

Creation Date

05-APR-2024 12:12:35

Current

INR

Li

Lines

New

Open

Clear

New

Find (B)

