IACS Oracle Up-gradation – Requisition

User Manual

Version: 1.0

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:

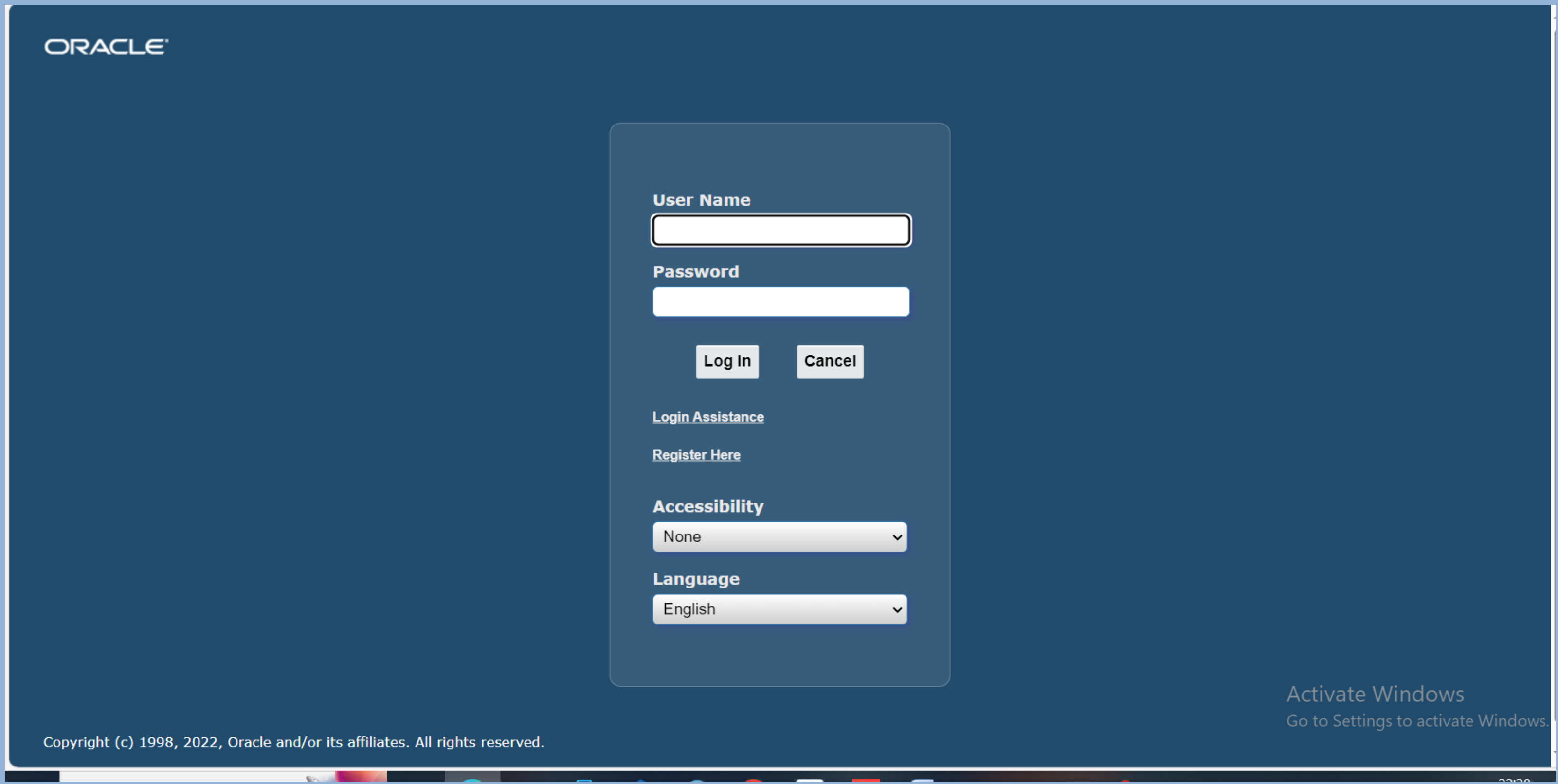
Section 1 covers the document structure along with key business processes of Purchase Requisition

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

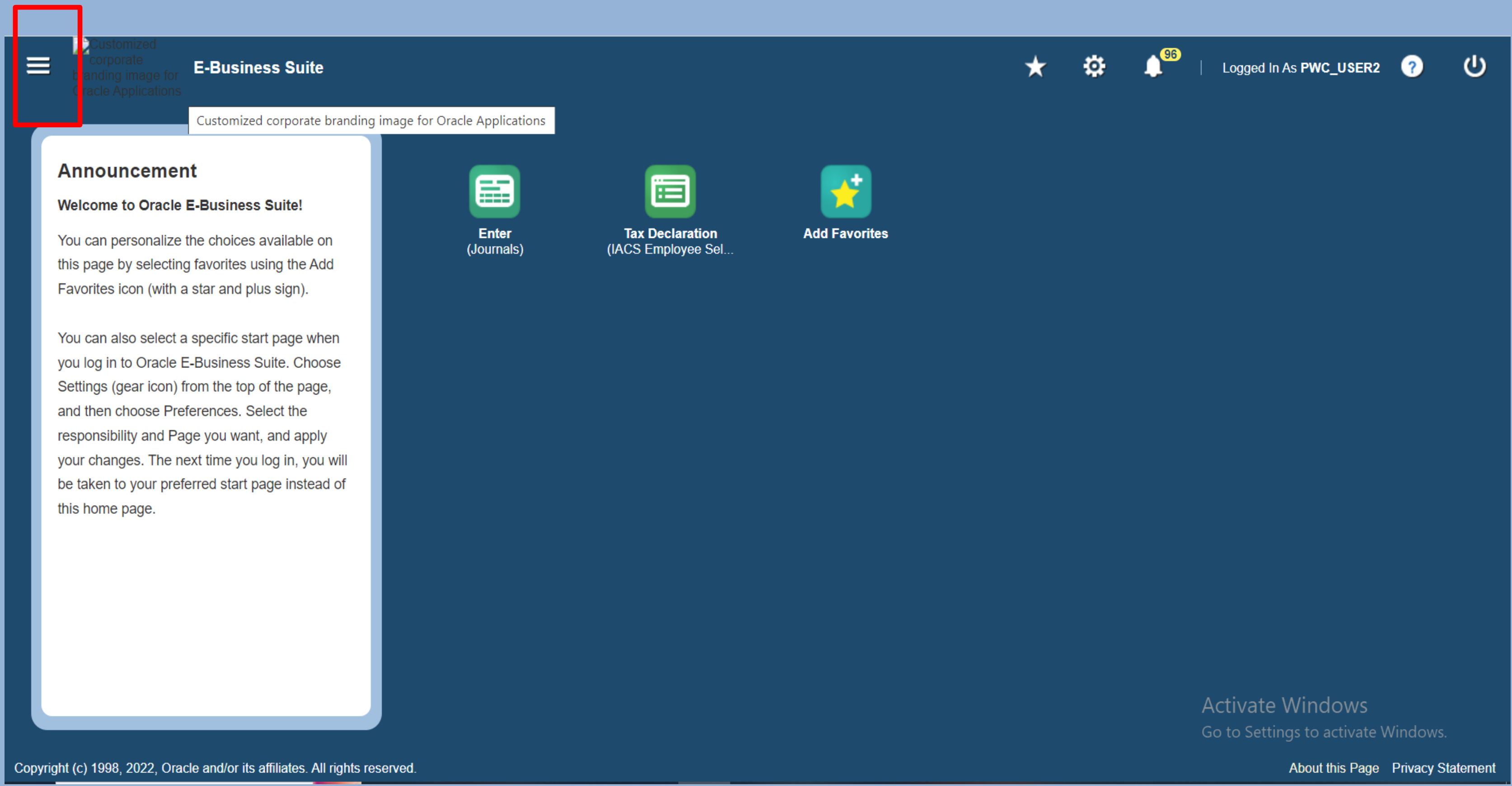
1.2 Key Business Processes

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.

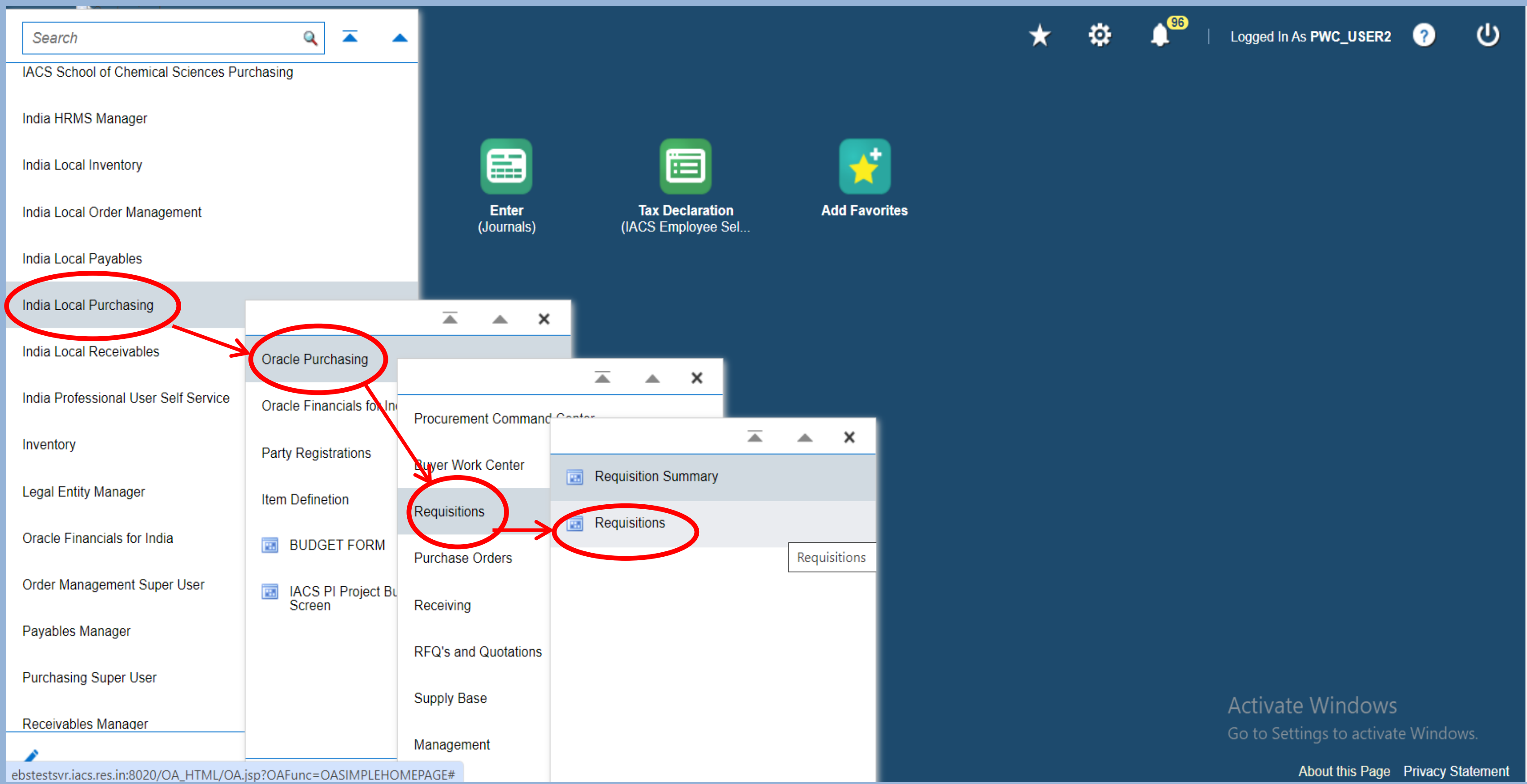
Step 1: Log In using User Id & Password



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



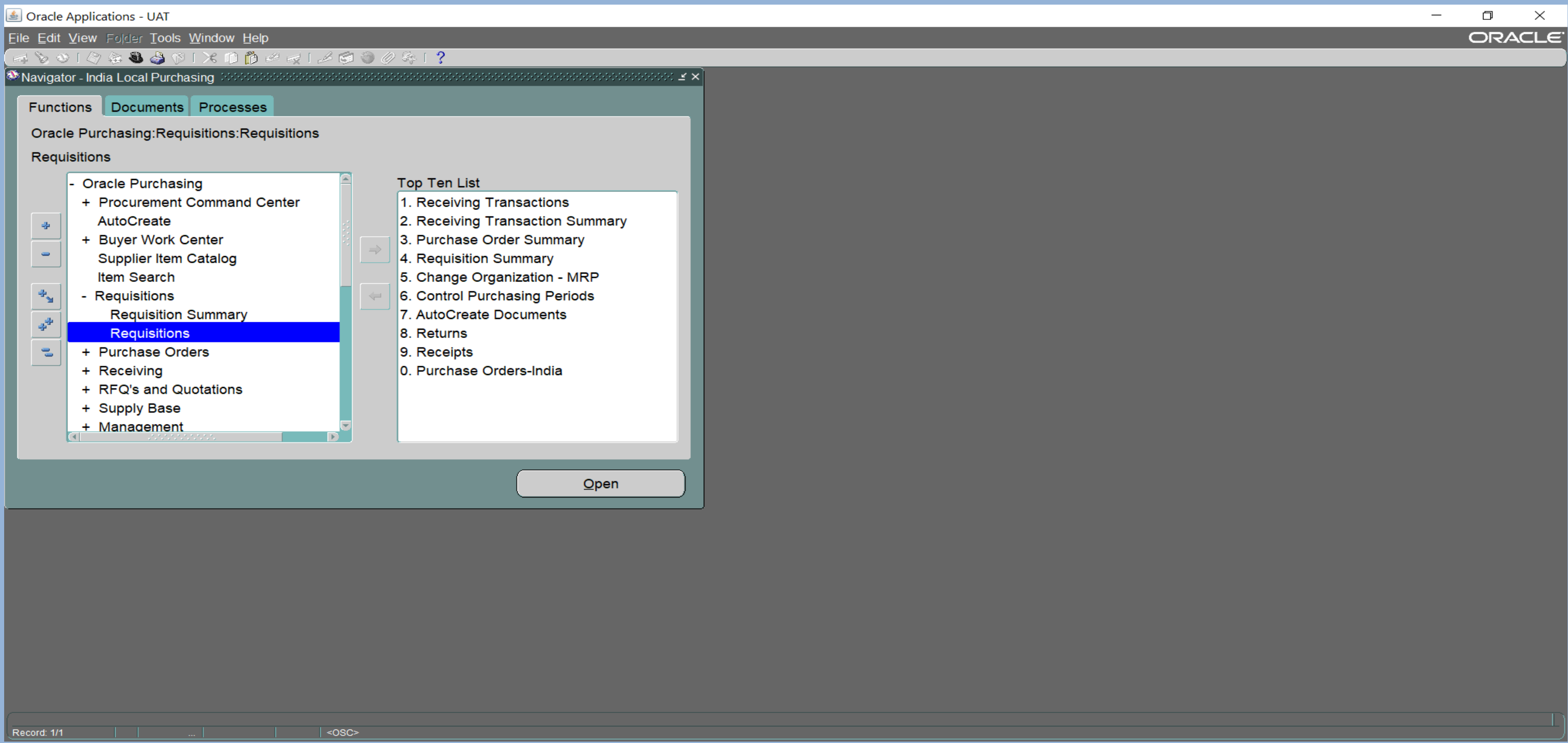
Step 3: Go to the India Local Purchasing -> Oracle Purchasing ->Requisition -> Requisition



2 Purchase Requisition

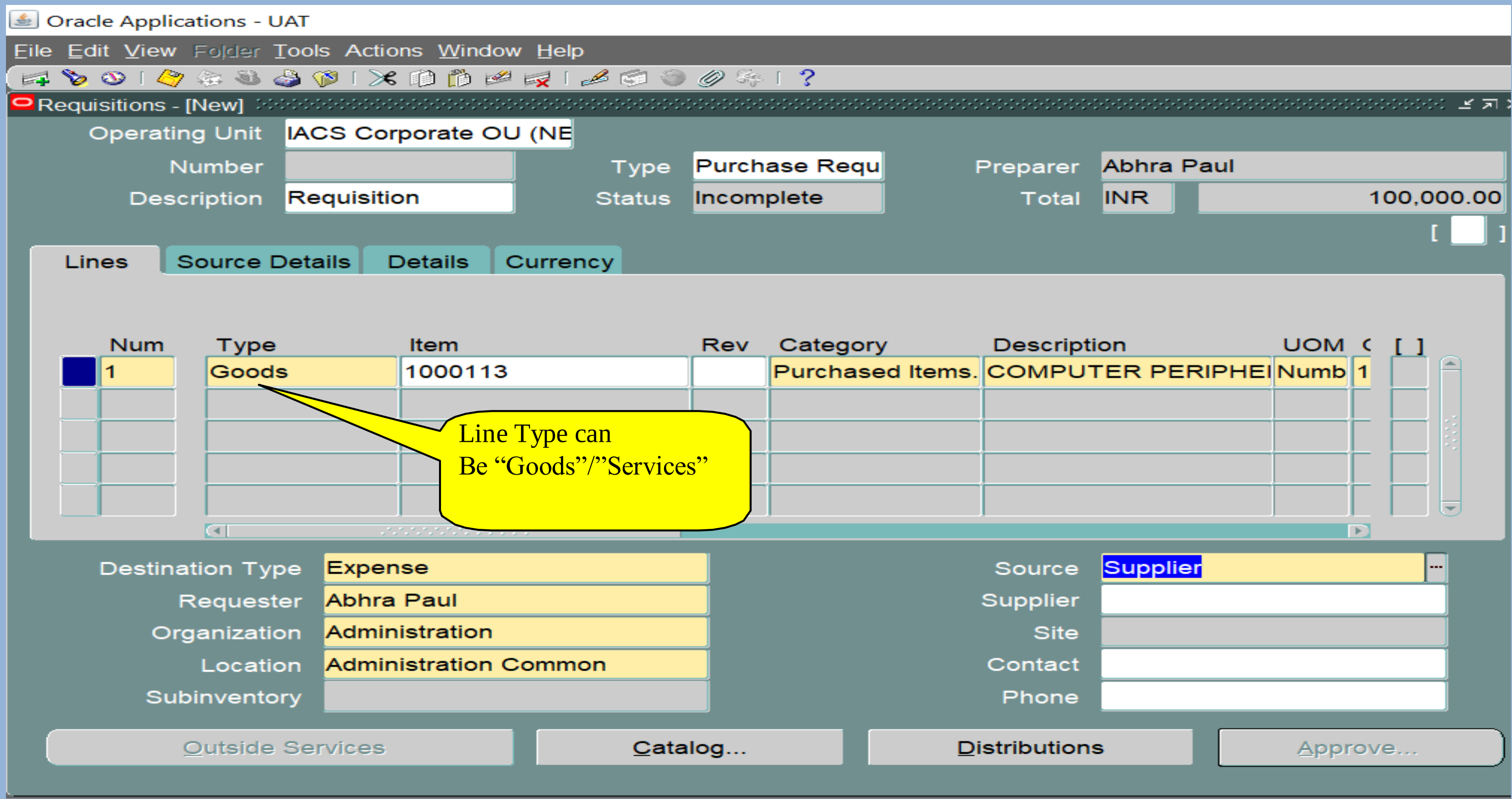
2.1 Creation of Purchase Requisition

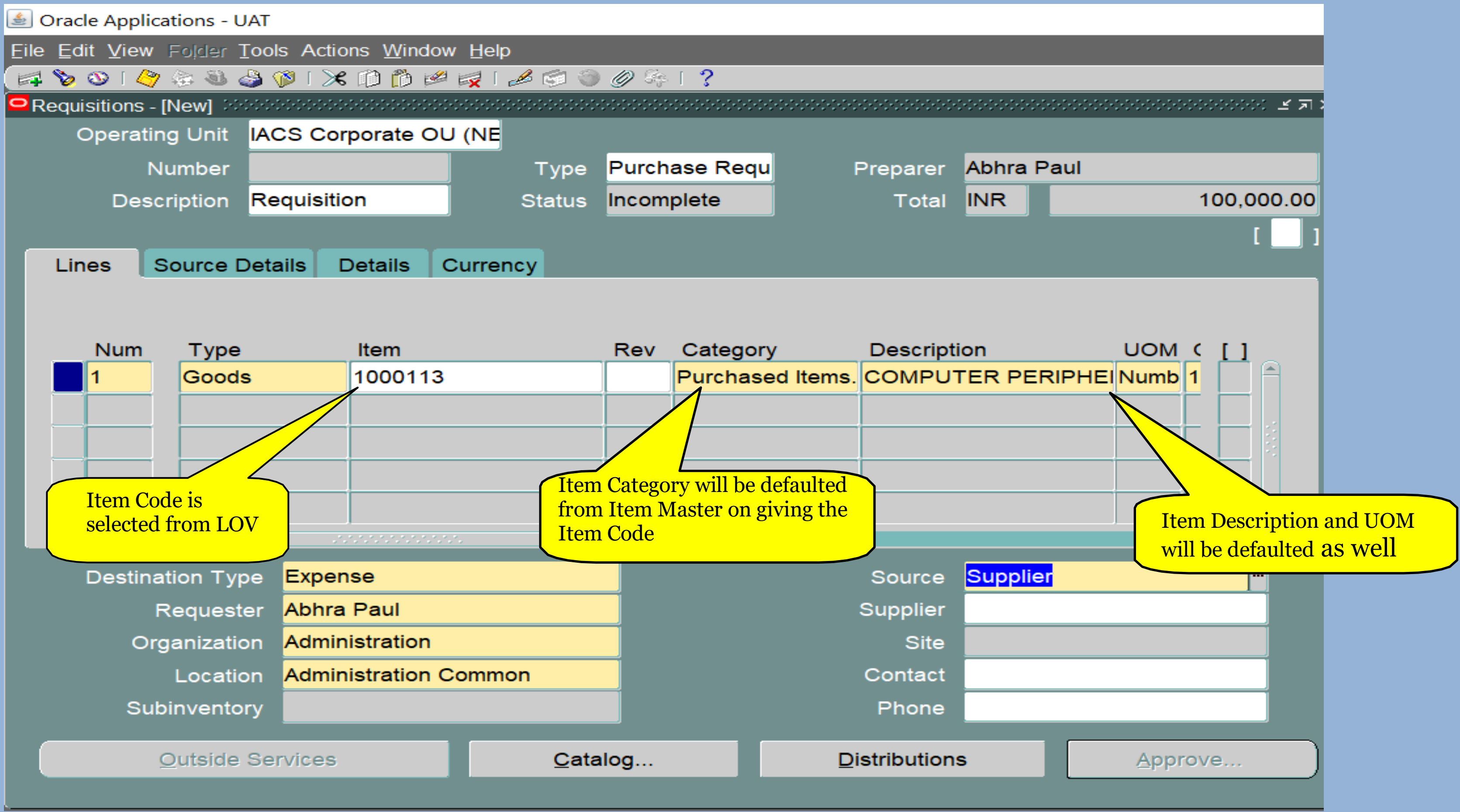
Screen: Purchase Requisition Screen
Purpose: To create a new Purchase Requisition.
Navigation: Purchasing Responsibility (India local Purchasing) -> Oracle Purchasing ->Requisitions ->Requisitions



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

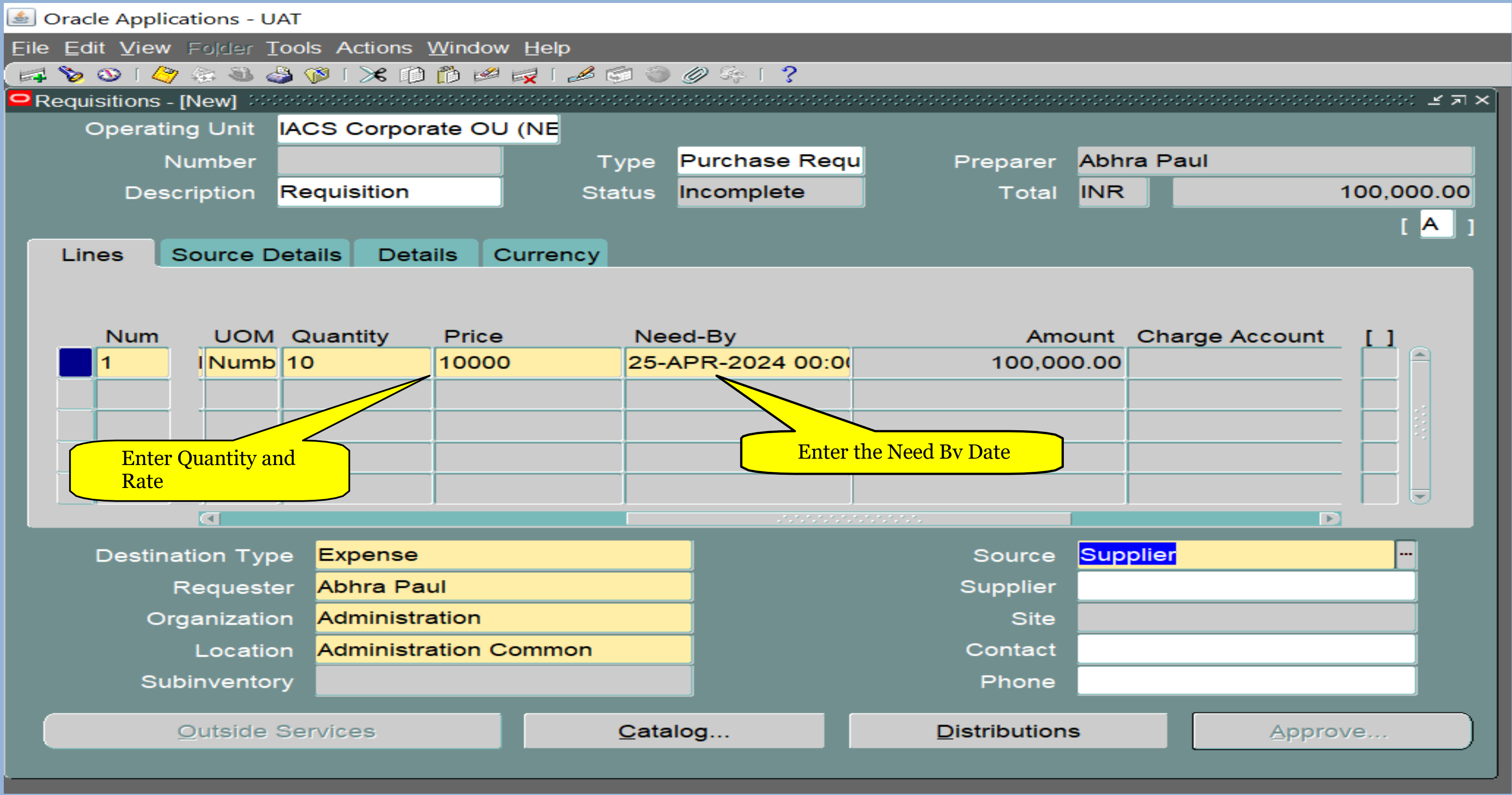
Step 2: In the “Item” field, select the Item Code from the LOV. On selecting the Item Code, the “Description”, “Category” and “UOM” will default from the Item Master. In case of Services, choose the Line Type as “Services”.

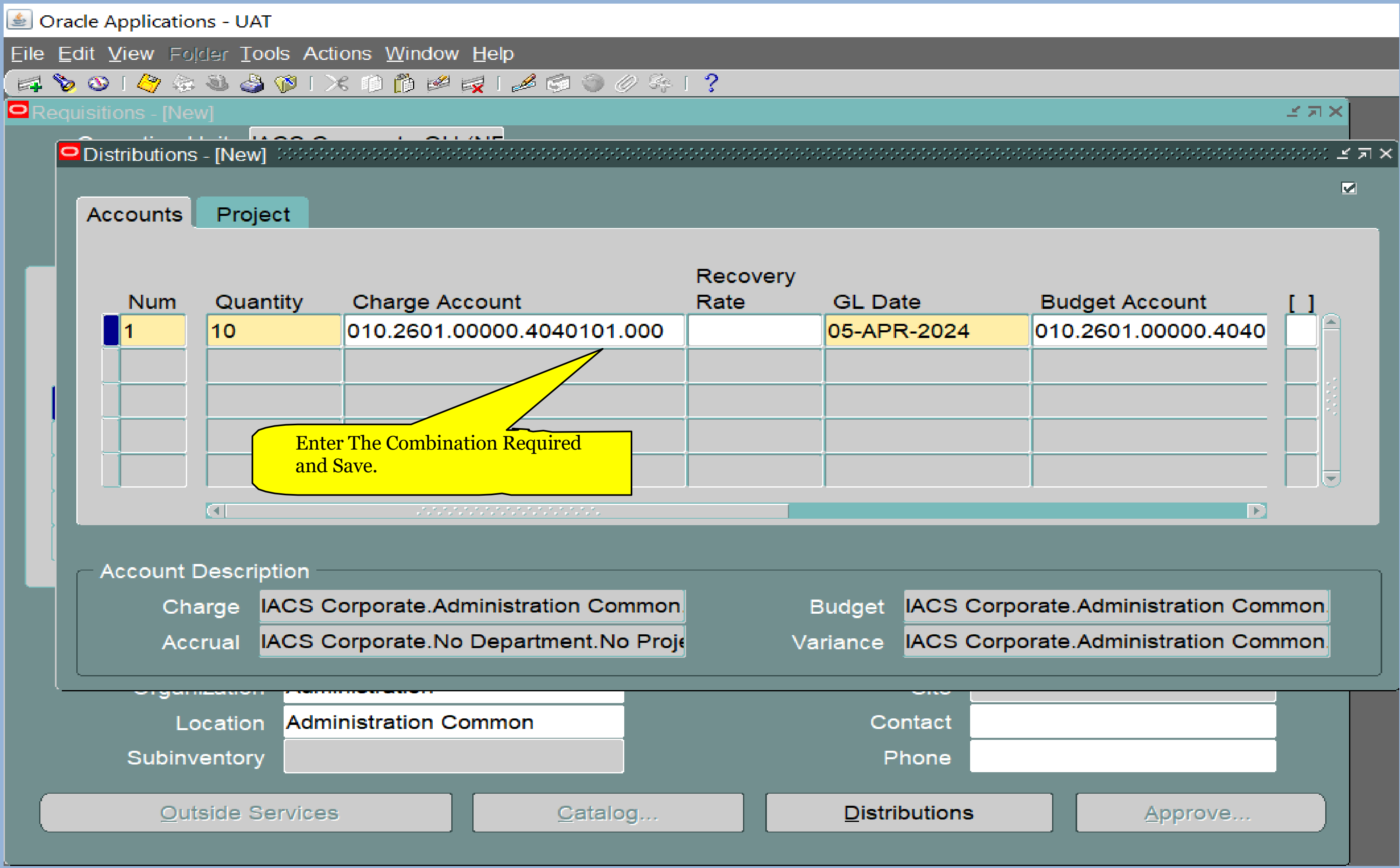



Oracle Applications - UAT
File Edit View Folder Tools Actions Window Help
Requisitions - [New]
Operating Unit
IACS Corporate OU (NE
Number
Type
Purchase Requ
Preparer
Abhra Paul
Description
Requisition
Status
Incomplete
Total
INR
100,000.00
Lines
Source Details
Details
Currency
Num
Type
Item
Rev
Category
Description
UOM
1
Goods
1000113
Purchased Items.
COMPUTER PERIPHEI
Numb
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...

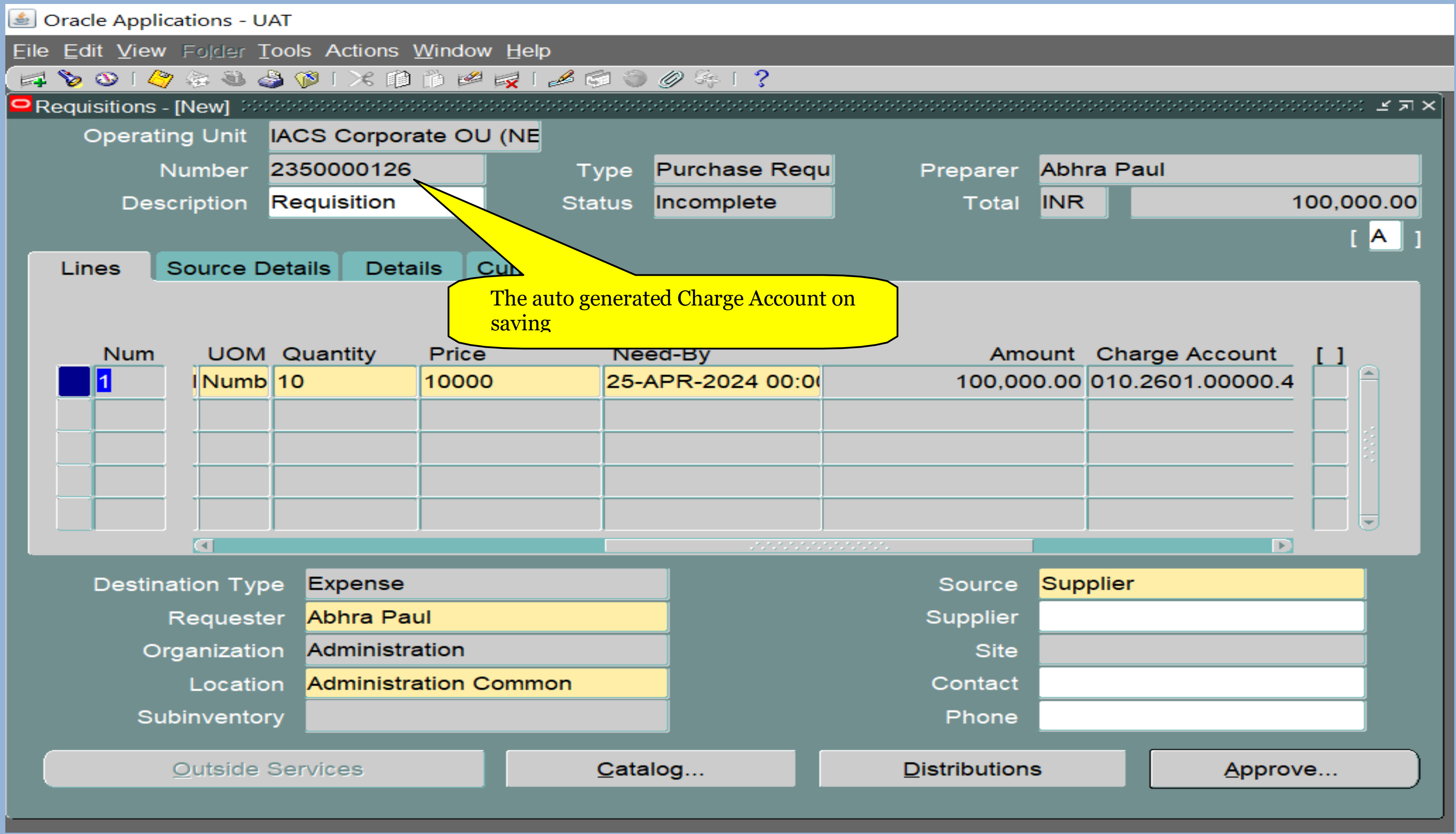
Step 3: Enter the number of goods required in the "Quantity" field. Enter the estimated price of each item in the "Price field" Under the "Need-by-date" field enter the envisaged date by which the goods/services will be required.

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

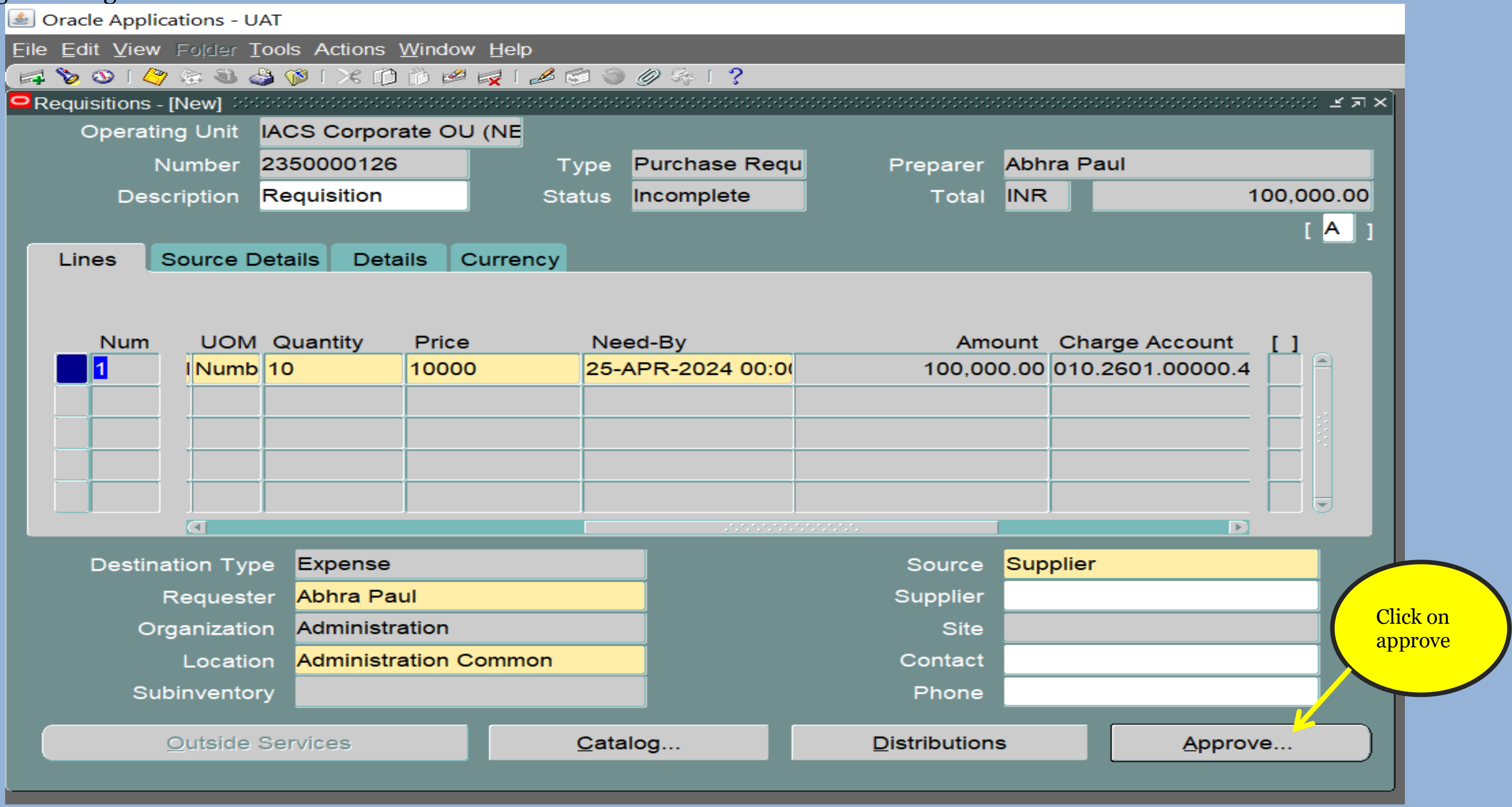



Oracle Applications - UAT
File Edit View Folder Tools Actions Window Help
Requisitions - [New]
Distributions - [New]
Accounts
Project
Num
Quantity
Charge Account
Recovery Rate
GL Date
Budget Account
[ ]
1
10
010.2601.00000.4040101.000
05-APR-2024
010.2601.00000.4040
Enter The Combination Required and Save.
Account Description
Charge
IACS Corporate.Administration Common
Accrual
IACS Corporate.No Department.No Proje
Budget
IACS Corporate.Administration Common
Variance
IACS Corporate.Administration Common
Location
Administration Common
Subinventory
Contact
Phone
Outside Services
Catalog...
Distributions
Approve...

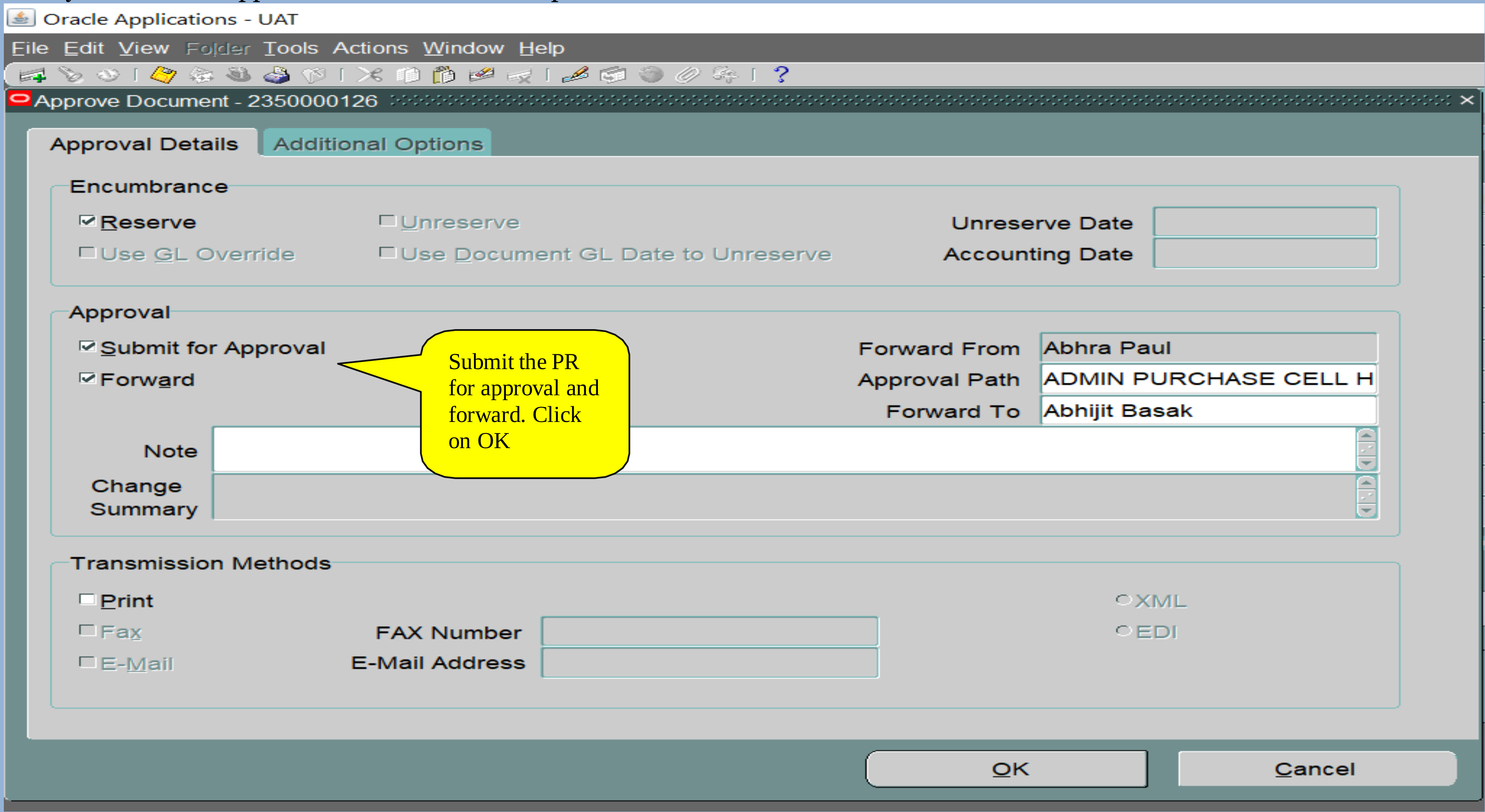
Step 5: In the Requisition Header, the Requisition Number will be auto generated on saving in the “Number” field.



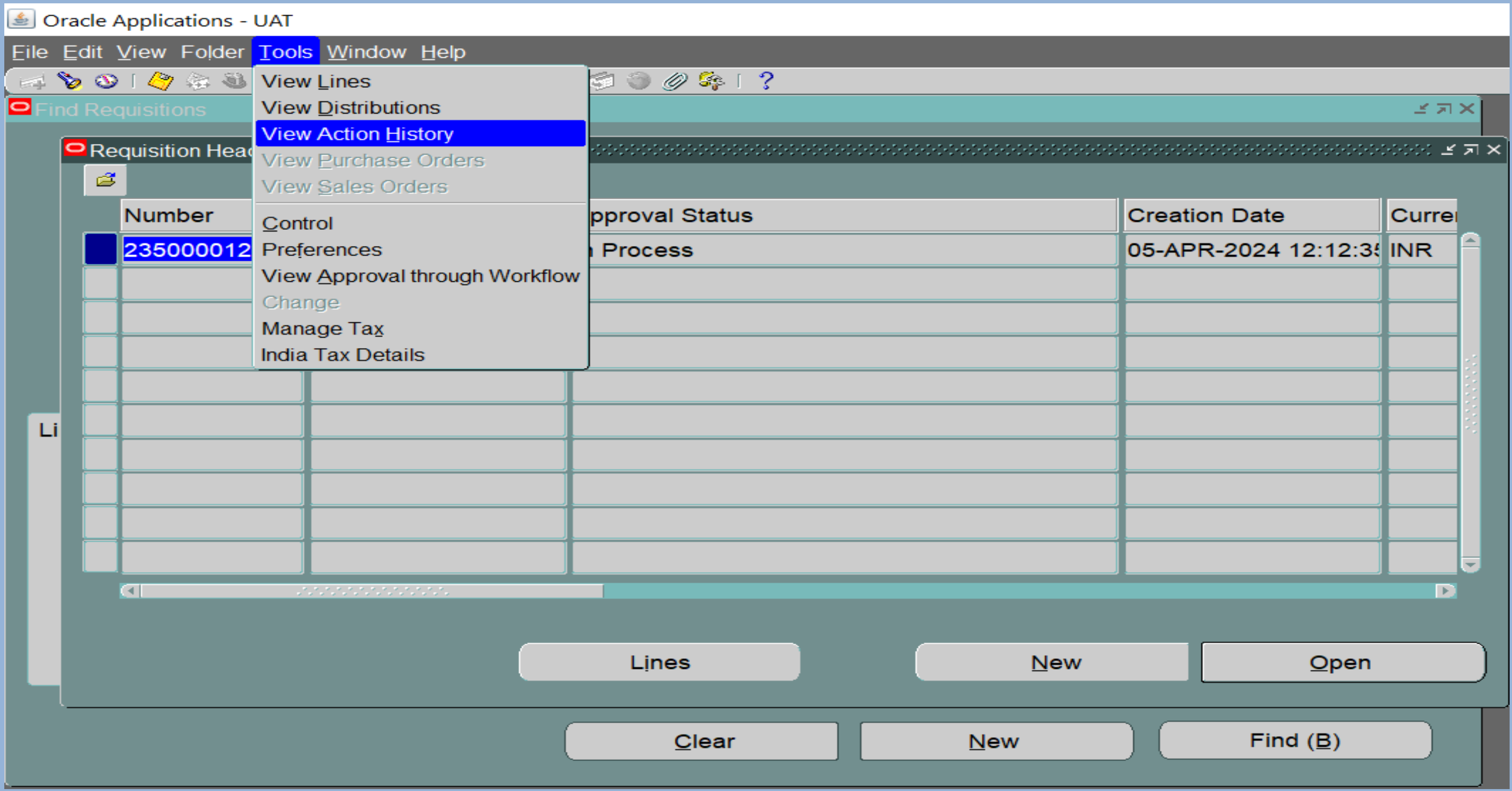
Step 1: Query the Requisition from the Requisition Summary and Click on "Approve"
Before Approve the requisition go to Tools and click on check fund.
Here get message fund check or failure.



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.

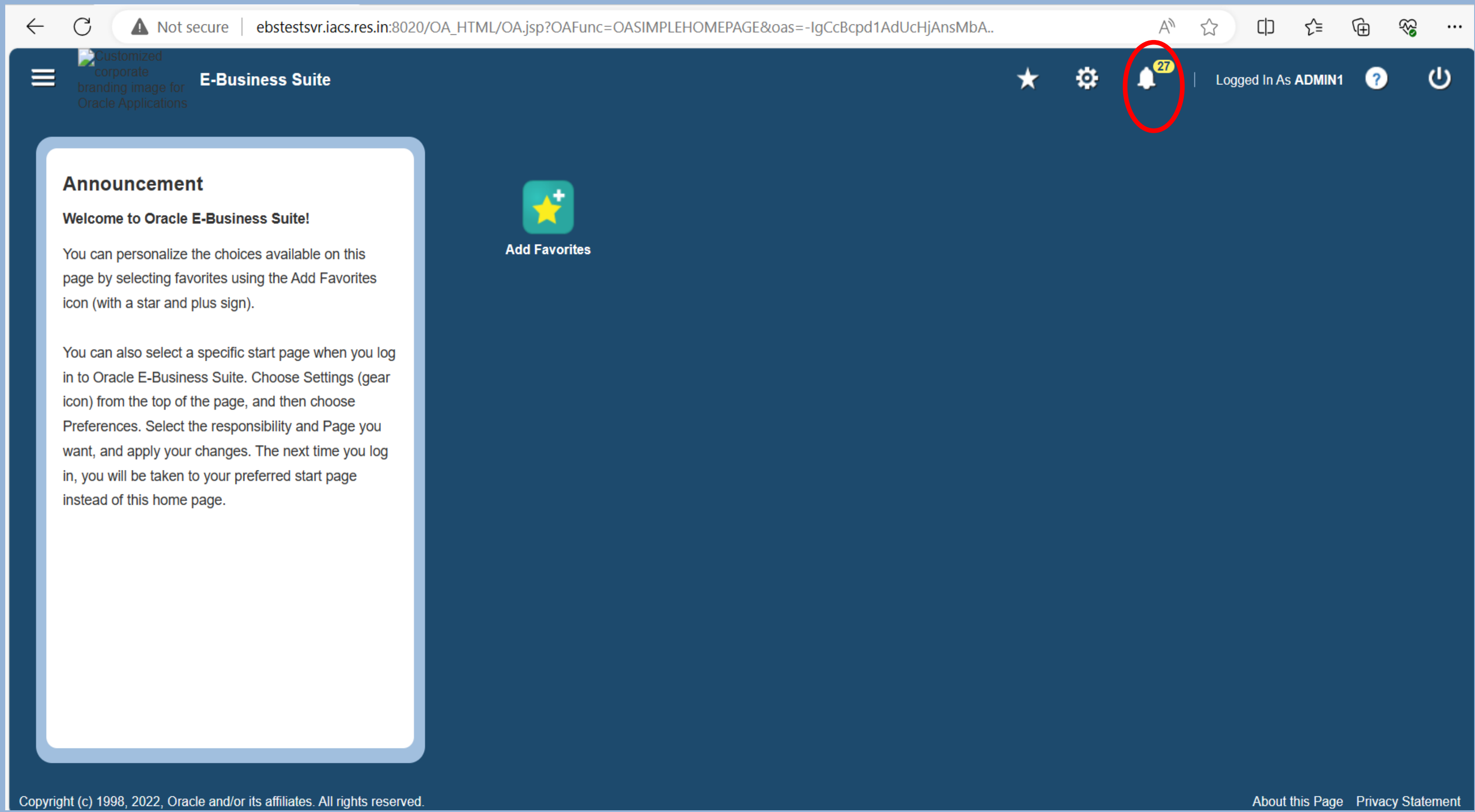


Step 4 : Go to “Tools”> “View Action History” to identify the approver with whom the requisition is pending for approval. The Approval path depends on the Requisition Amount.

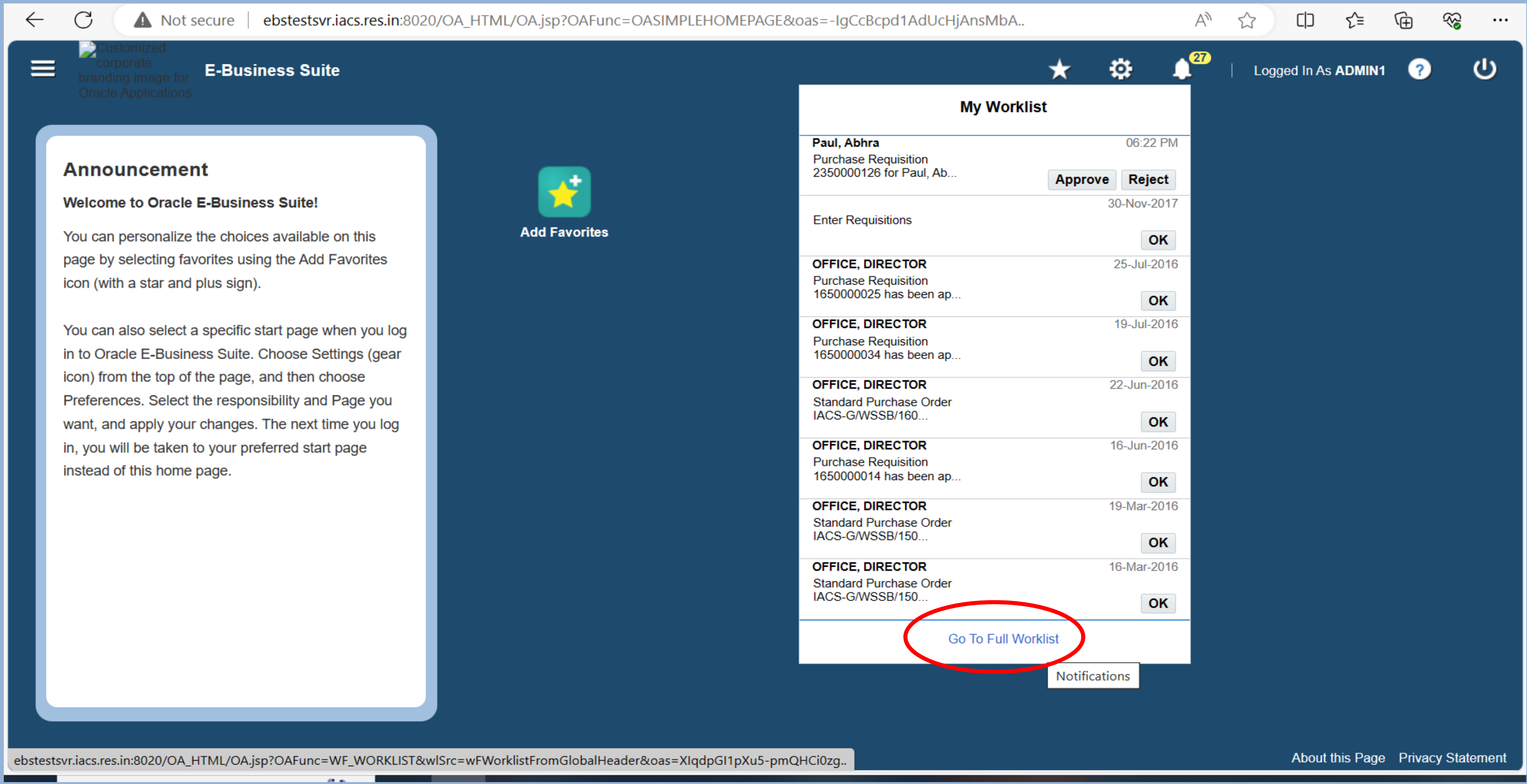


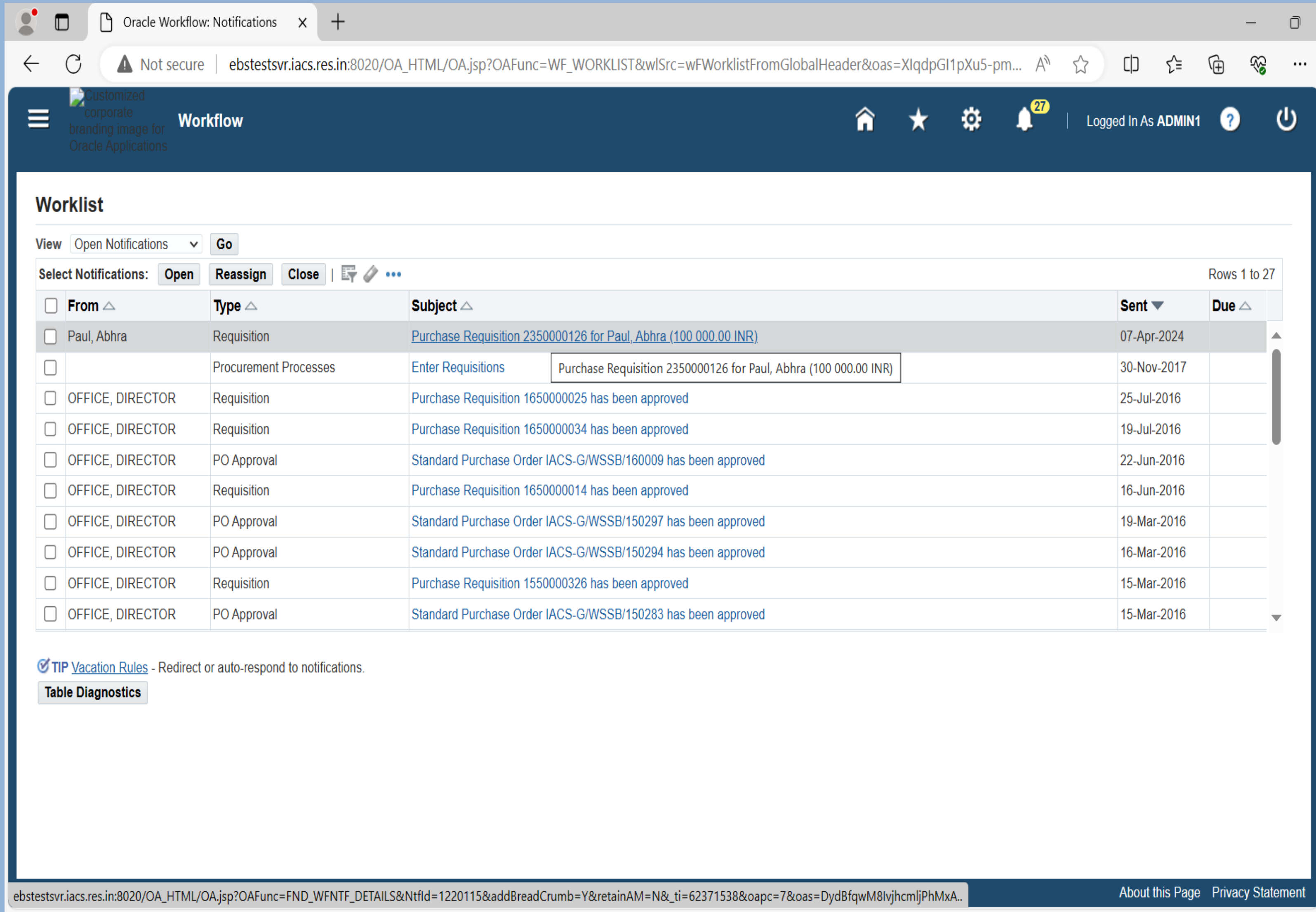
Step 5: The approver logs in to approve the Purchase Requisition. He opens the notification on his Work List and clicks on the "Approve" tab.

For access the work list click on the bell icon.

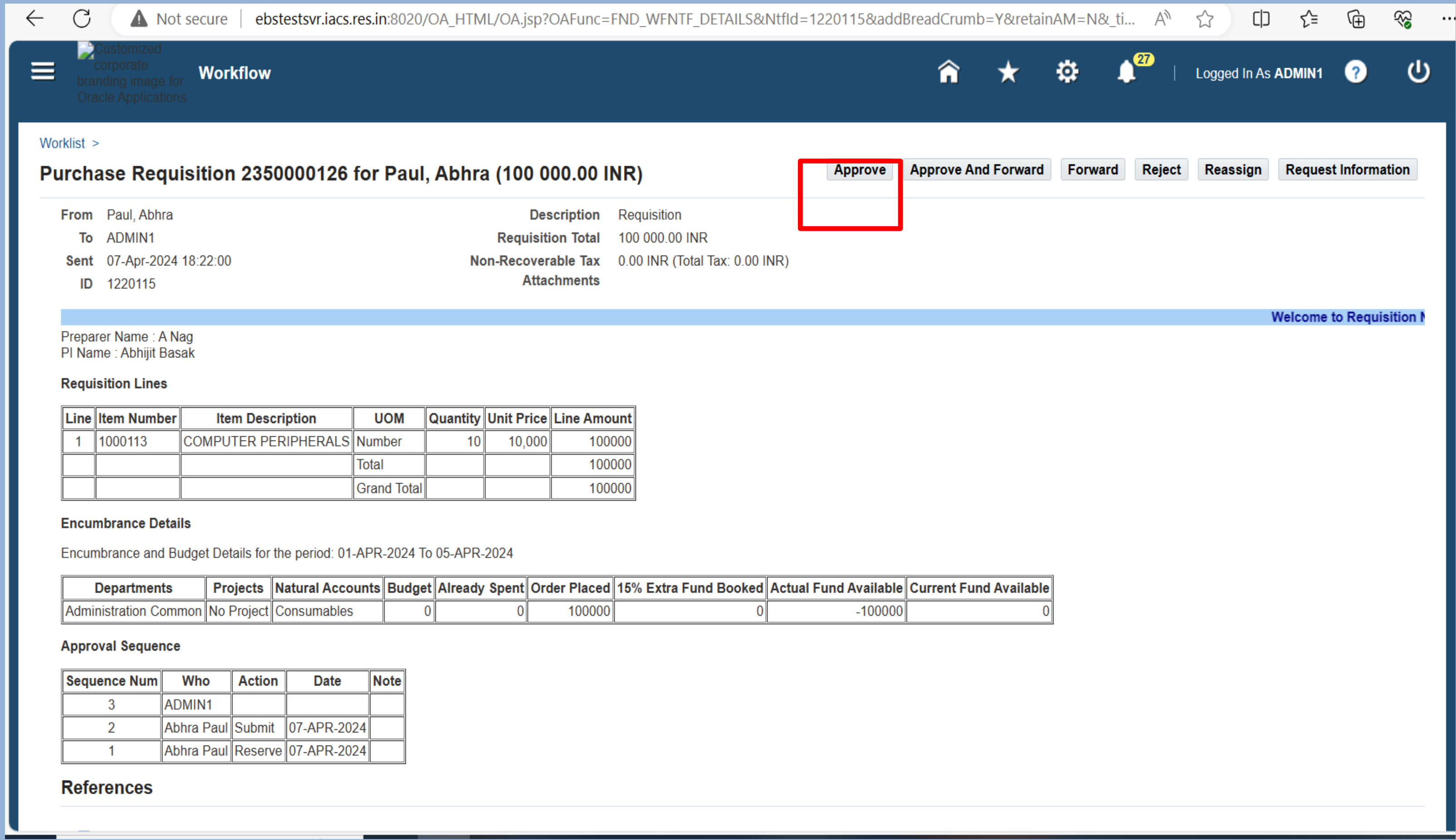


Click on the “Go to Full Worklist”




Oracle Workflow: Notifications
Not secure
ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=WF_WORKLIST&wlSrc=wFWorklistFromGlobalHeader&oas=XlqdpGI1pXu5-pm...
Workflow
27
Logged In As ADMIN1
Worklist
View Open Notifications Go
Select Notifications: Open Reassign Close
Rows 1 to 27
From Type Subject Sent Due
Paul, Abhra Requisition Purchase Requisition 2350000126 for Paul, Abhra (100 000.00 INR) 07-Apr-2024
Procurement Processes Enter Requisitions 30-Nov-2017
Purchase Requisition 2350000126 for Paul, Abhra (100 000.00 INR)
OFFICE, DIRECTOR Requisition Purchase Requisition 1650000025 has been approved 25-Jul-2016
OFFICE, DIRECTOR Requisition Purchase Requisition 1650000034 has been approved 19-Jul-2016
OFFICE, DIRECTOR PO Approval Standard Purchase Order IACS-G/WSSB/160009 has been approved 22-Jun-2016
OFFICE, DIRECTOR Requisition Purchase Requisition 1650000014 has been approved 16-Jun-2016
OFFICE, DIRECTOR PO Approval Standard Purchase Order IACS-G/WSSB/150297 has been approved 19-Mar-2016
OFFICE, DIRECTOR PO Approval Standard Purchase Order IACS-G/WSSB/150294 has been approved 16-Mar-2016
OFFICE, DIRECTOR Requisition Purchase Requisition 1550000326 has been approved 15-Mar-2016
OFFICE, DIRECTOR PO Approval Standard Purchase Order IACS-G/WSSB/150283 has been approved 15-Mar-2016
TIP Vacation Rules - Redirect or auto-respond to notifications.
Table Diagnostics
ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220115&addBreadCrumb=Y&retainAM=N&_ti=62371538&oapc=7&oas=DydBfqwM8lvjhcmljPhMxA..
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...

Workflow

Logged In As ADMIN1

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 N

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

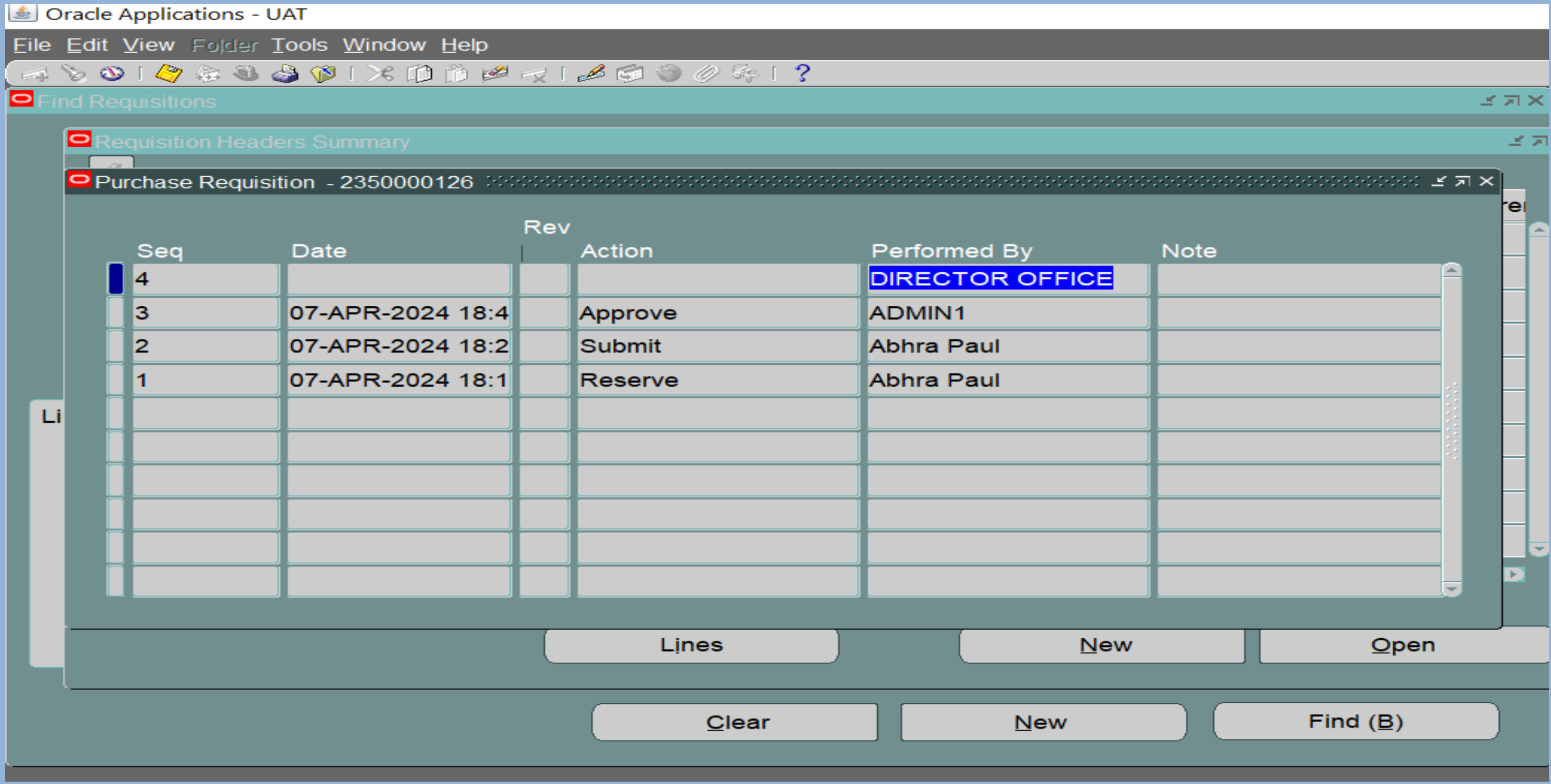
Sequence Num	Who	Action	Date	Note
3	ADMIN1			
2	Abhra Paul	Submit	07-APR-2024	
1	Abhra Paul	Reserve	07-APR-2024	

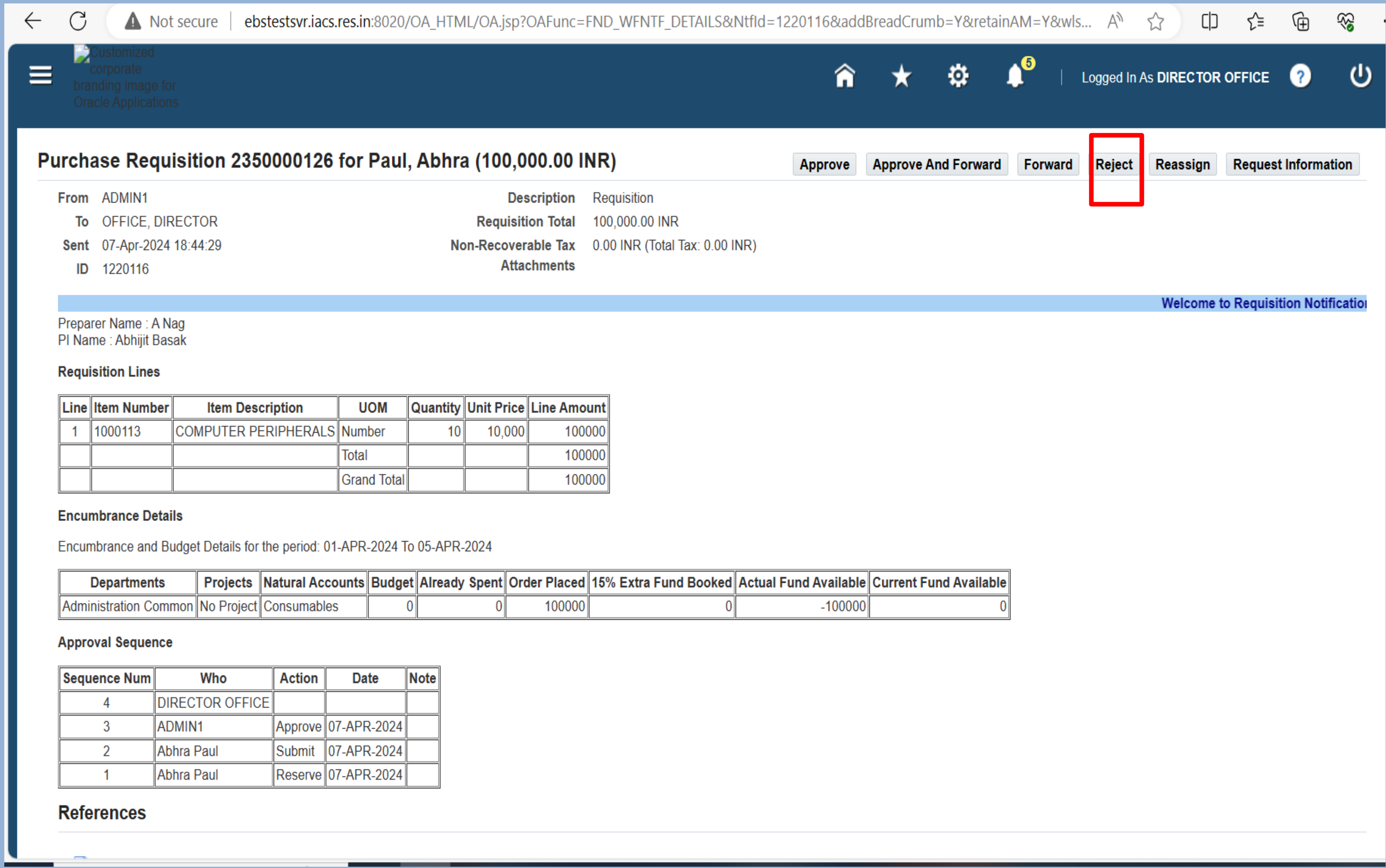
References

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 clicling Reject button.





Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220116&addBreadCrumb=Y&retainAM=Y&wls...

Logged In As DIRECTOR OFFICE

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

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

From ADMIN1
To OFFICE, DIRECTOR
Sent 07-Apr-2024 18:44:29
ID 1220116

Description Requisition
Requisition Total 100,000.00 INR
Non-Recoverable Tax 0.00 INR (Total Tax: 0.00 INR)
Attachments

Welcome to Requisition Notificatio

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

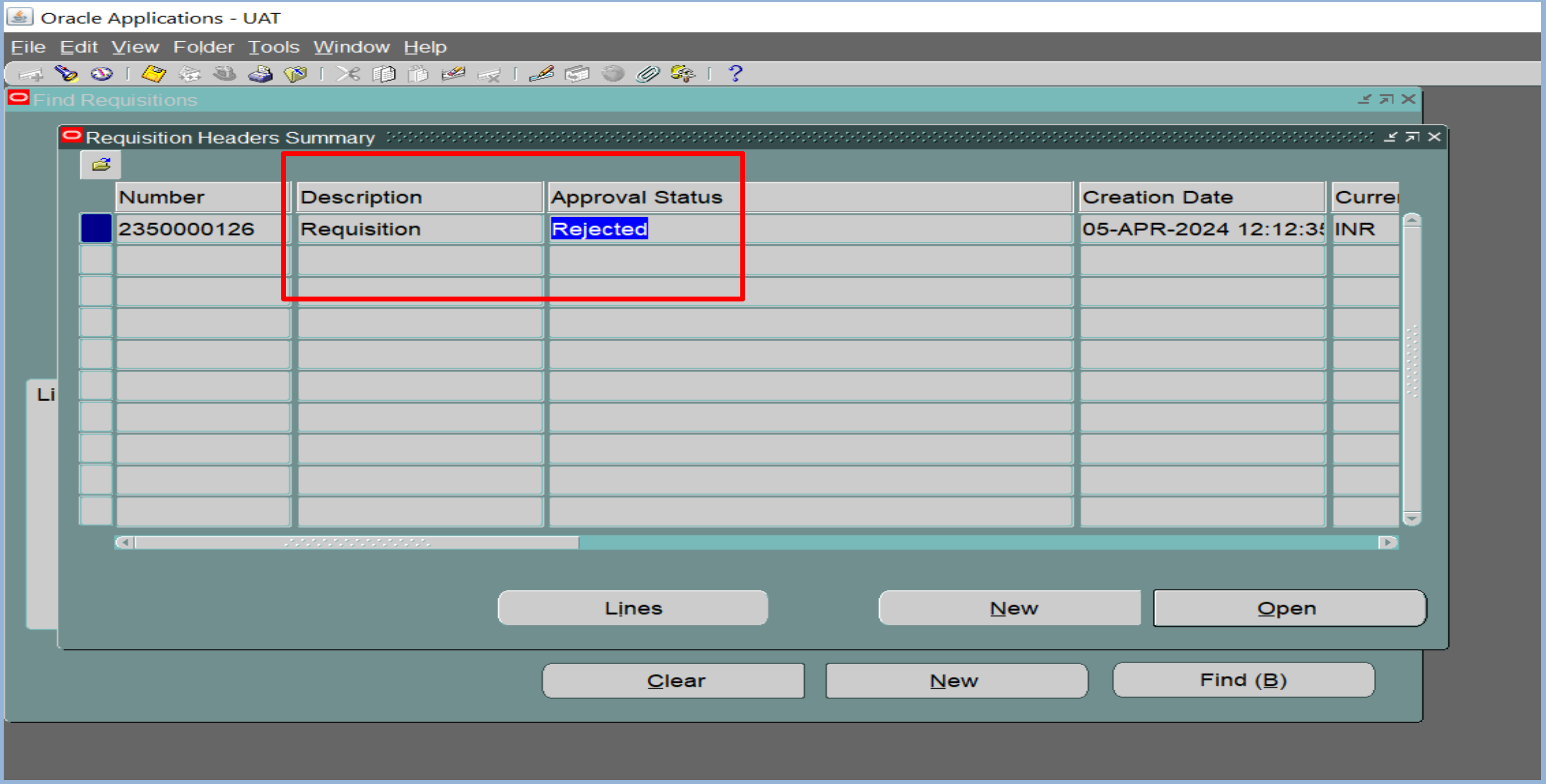
Departments	Projects	Natural Accounts	Budget	Already Spent	Order Placed	15% Extra Fund Booked	Actual Fund Available	Current Fund Available
Administration Common	No Project	Consumables	0	0	100000	0	-100000	0

Approval Sequence

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

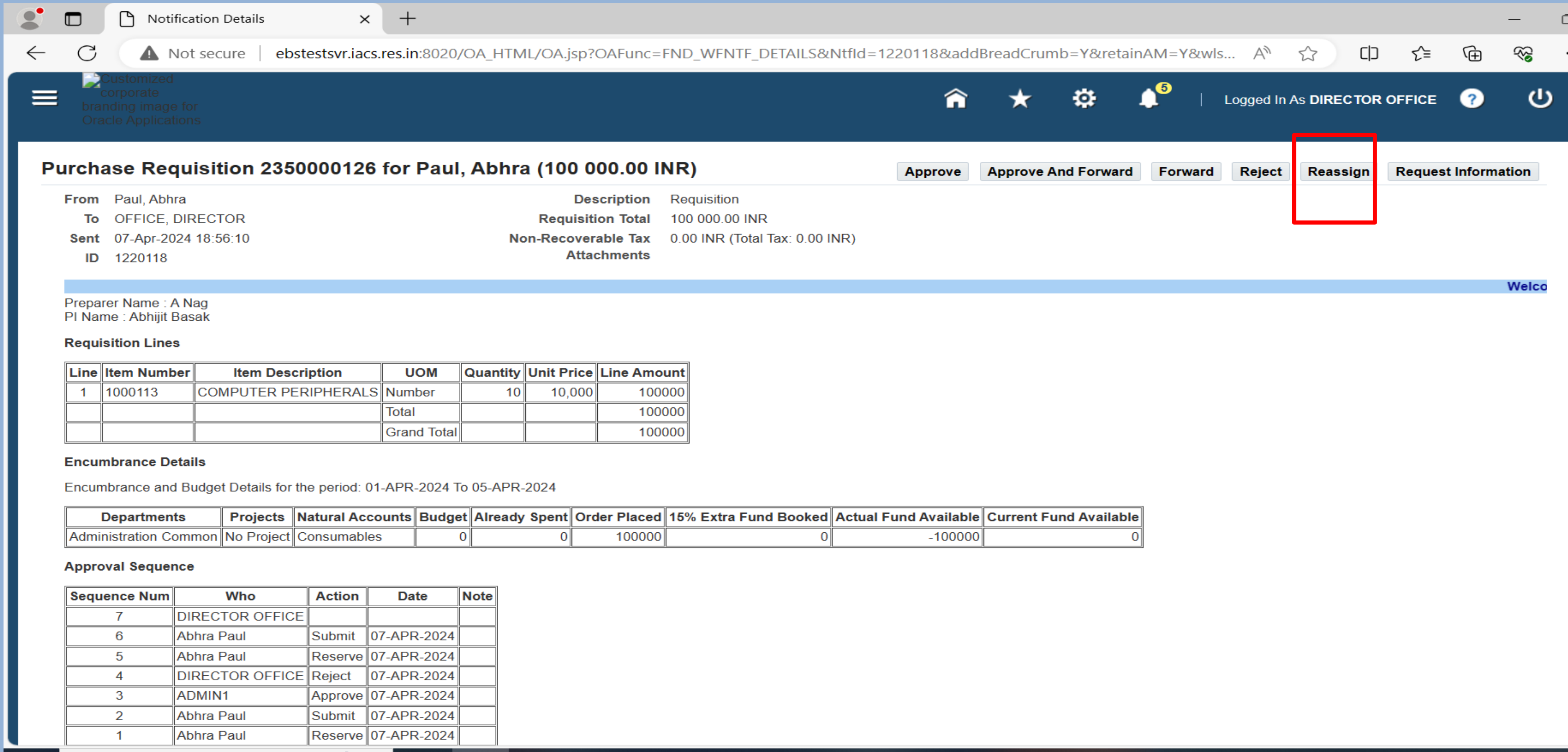
References

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

Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220118&addBreadCrumb=Y&retainAM=Y&wls...

Logged In As **DIRECTOR OFFICE**

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

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

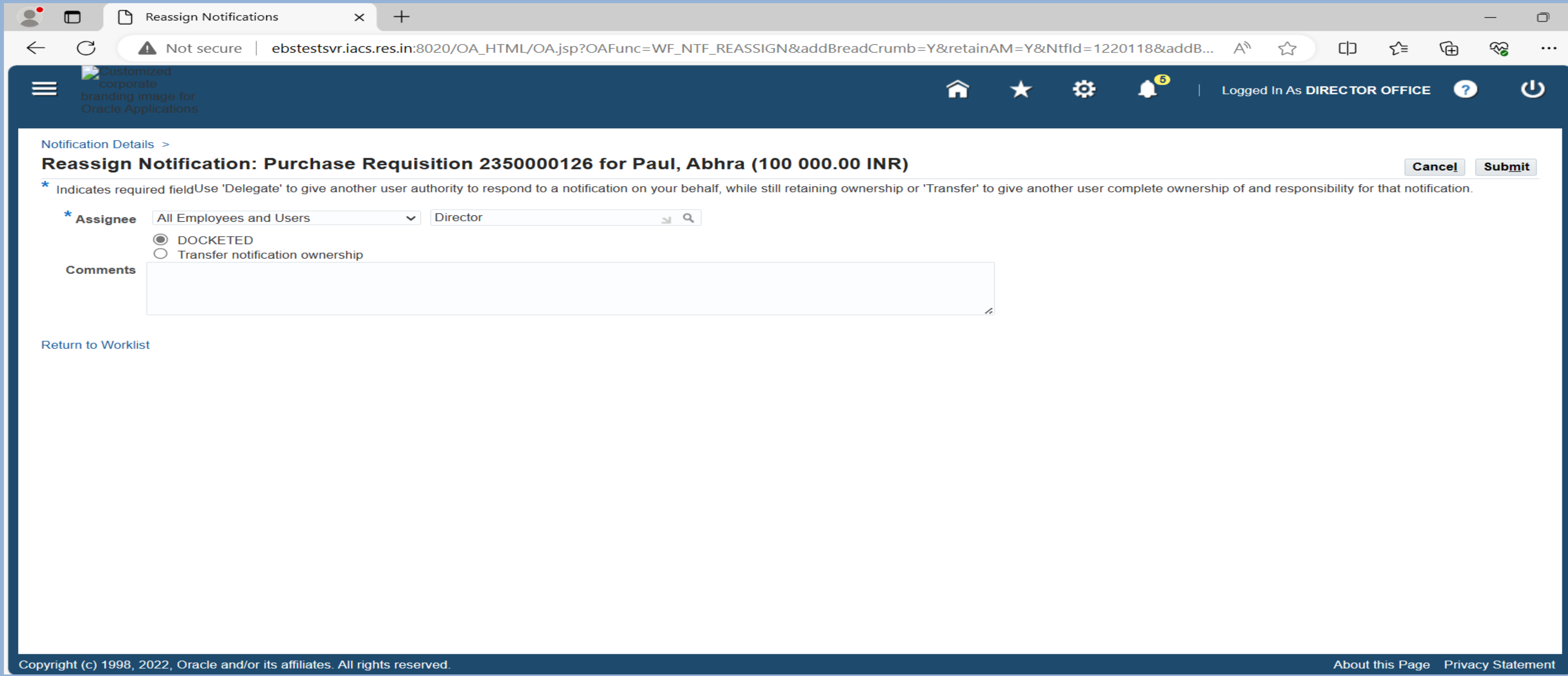
Encumbrance Details

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

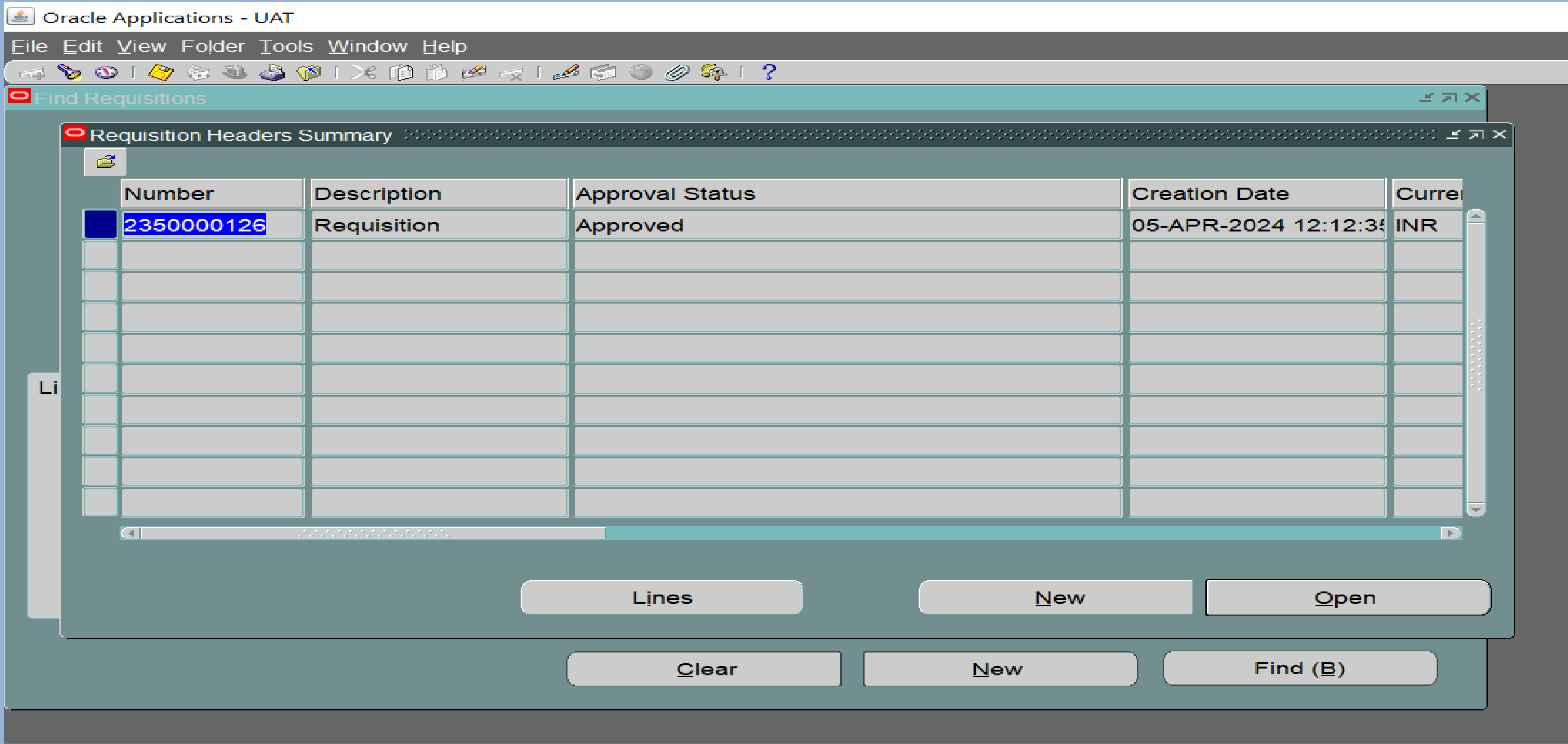
Departments	Projects	Natural Accounts	Budget	Already Spent	Order Placed	15% Extra Fund Booked	Actual Fund Available	Current Fund Available
Administration Common	No Project	Consumables	0	0	100000	0	-100000	0

Approval Sequence

Sequence Num	Who	Action	Date	Note
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	



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
Description
Approval Status
Creation Date
Curre
2350000126
Requisition
Approved
05-APR-2024 12:12:3
INR
Li
Lines
New
Open
Clear
New
Find (B)