

Requisition Guide for Requesters



Oracle Financials Requisition Guide For Requesters

Office of Procurement

Alan Snyder
301-687-4243
arsnyder@frostburg.edu

Krista Warnick
301-687-4242
kawarnick@frostburg.edu

PeopleSoft Sign On

ORACLE | PEOPLESOFT

Sign In

User ID

Password

English

Sign In

[Enable Accessibility Mode](#)

[Set Trace Flags](#)

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Requires a User ID & Password

Case sensitive (upper/lower)

****Note**** - your User ID is associated with almost every transaction you make

Requisition Manual for Requesters

Basic steps for Requisitioning

Header – Requisition Defaults (applicable to entire requisition)

1. Default / Override
Use the Override if the charge is to be different than what populated. Verify that the distribution has been brought in successfully. If a default did not populate or needs changed, please add dept or project, program and fund.
2. Buyer: Enter Alan Snyder
3. Select the recommended supplier for the entire requisition

Line Item

4. Choose an Item
(Items correspond to an account. This will populate the account on the line distribution)
5. Blank out populated description and create a detailed description for the item to be requested
6. Enter the quantity, unit of measure, and price

Distribution (specific to individual line)

7. Verify that the default distribution has been brought in successfully
8. If distribution needs to be changed,
 - Department/Project: change to desired department (Make sure Program and Fund are changed to match the Department or Project number selected)

Completing the Requisition Process

9. Header Comments
10. Attachments
11. Save the requisition
12. Budget check the requisition
13. Submit for approval

Entering Requisitions

PS Menu Navigation

Click on the following menu navigation

Navigation	<i>Main Menu>Purchasing>Requisitions> - Add/Update Requisitions</i>
------------	----------------------------------------------------------------------------------------------

A page similar to the illustration below should appear on your screen:

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

New Window | Help

Requisitions

Find an Existing Value Add a New Value

Business Unit FROST Q

Requisition ID NEXT

Add

Find an Existing Value | Add a New Value

Click ADD

This is the same page you will use to retrieve Existing Requisitions (under the "Find Existing Value" tab).

Your Next Screen Should Look Like This

The screenshot displays the Oracle Requisition interface. At the top is the Oracle logo and a navigation bar with links like Home, Worklist, Add to Favorites, and Sign out. Below this is a breadcrumb trail: Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions. The main heading is 'Maintain Requisitions' with a sub-heading 'Requisition'. The form includes fields for Business Unit (FROST), Requisition ID (NEXT), Requisition Name, Status (Open), Budget Status (Not Ch'd), and a checkbox for 'Hold From Further Processing'. A 'Header' section contains fields for *Requester (kawarnick), *Requisition Date (05/08/2015), Origin (ONL), *Currency Code (USD), and Accounting Date (05/08/2015). An 'Amount Summary' section shows a Total Amount of 500.00 USD. Below this is a 'Line' section with a table of requisition items. The table has columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first row shows a quantity of 0, UOM of EA, and a price of 500.00. At the bottom are buttons for Save, Refresh, Add, and Update/Display.

Oracle

Home | Worklist | Add to Favorites | Sign out

Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit: FROST
Requisition ID: NEXT
Requisition Name: Copy From
Status: Open
Budget Status: Not Ch'd
Hold From Further Processing

Header

*Requester: kawarnick
*Requisition Date: 05/08/2015
Origin: ONL
*Currency Code: USD
Accounting Date: 05/08/2015

Requester Info
Accounts Payable Vouchers
Dollar

Amount Summary

Total Amount: 500.00 USD

Line

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
			0	EA	2 WAY		500.00	Open

View Printable Version | View Approvals | *Go to ... More...

Save | Refresh | Add | Update/Display

The information between the **Header** and **Line** is Header information and pertains to the entire Requisition.

Requester: Should contain your User ID with your name displayed beside it.

Req Date: Defaults in as today's date. This date will only be changed if a Requisition has been on hold for more than one day. The date should be changed to today's date so that the requisition will truly represent the date that the request was made.

Origin: Defaults from your User ID setup.

Currency: USD – will always be USD

Accounting Date: Defaults in as today's date.

Click on the blue hyperlink [Requisition Defaults](#)

This should be your next screen

Requisition Defaults x Help

Business Unit FROST Requisition Date 05/04/2015
 Requisition ID NEXT Status Open

Default Options ?

☒ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☐ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer Unit of Measure
 Supplier Supplier Location
 Category Supplier Lookup

Schedule

Ship To RECV Central Receiving *Distribute By Quantity
 Due Date
 Ultimate Use Code
 Attention To One Time Address

Distribution

SpeedChart

Distributions Personalize | Find | View All | First 1 of 1 Last

Details Asset Information

Dist	Percent	GL Unit	Dept	PC Bus Unit	Project	Activity	Account	Program	Fund	Budget Date	Location	IN Unit
1		FROST								05/04/2015	ST	

OK Cancel Refresh

Default Options: See explanations

Override: Click this button if you want the whole requisition to override with a new department or if the department did not default.

Requisition Defaults Help

Business Unit FROST Requisition Date 05/04/2015
 Requisition ID NEXT Status Open

Default Options ?

☒ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☐ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer Unit of Measure
 Supplier Supplier Location
 Category Supplier Lookup

Schedule

Ship To RECV Central Receiving *Distribute By Quantity
 Due Date
 Ultimate Use Code
 Attention To One Time Address

Distribution

SpeedChart

Distributions Personalize | Find | View All | First 1 of 1 Last

Details Asset Information

Dist	Percent	GL Unit	Dept	PC Bus Unit	Project	Activity	Account	Program	Fund	Budget Date	Location	IN Unit
1		FROST								05/04/2015	ST	

OK Cancel Refresh

Buyer: Enter Alan Snyder

Supplier: Click the magnifying glass. Enter the supplier under short name and click Look-Up. Once you found the supplier click on the supplier name. You should now be back to the above screen and the supplier name should now be displayed in the vendor box. (additional supplier instructions on following pages)

Category: This will be entered on the Maintain Requisition screen, no need to enter it again.

Unit of Measure: This will be entered on the Maintain Requisition screen, no need to enter it again.

Location: If you know the supplier you have chosen has various locations, choose the correct location by clicking on the magnifying glass.

Ship To: This section defaults to (RECV) Central Receiving. No need to make any changes.

Supplier Look Up Details

Supplier Search

Help

Search Criteria

Name

Alternate Supp Name

City

Country

Class

Max Rows

Short Name

State

Postal

Type

Search

14

44

44

44

44

Search Results

Personalize | Find | View All | | | First 1 of 1 Last

Set	Supplier ID	Location	Address	Short Supplier Name	Supplier Name	Withholding Applicable

Supplier Detail

Address

OK

Cancel

Refresh

Enter the first few letters of the supplier name in the Short Name field.

Then click “Search”

Every supplier in the financial system with that name should appear in the Search Results section. Once you find the one you want, click the little box to the far left of that supplier name.

Then click “OK”

Distribution Instructions on Default or Line Distribution

Distributions

- Percent:** This is the percentage of each line that will be charged to the Account/Department that is listed on the same line.
- GL Unit:** **FROST** – this will always be FROST.
- Department:** Enter the department number.
- Project:** Enter the project number. (Per line you have to choose either a department or project – you can't have both on one line)
- When entering a Project, 2 additional fields are now required:
PC Business Unit – "FROST" (all caps)
Activity ID – "DEFAULT" (all caps)
- Account:** The GL account number to which the items on the line are being charged (will default from the item).
- Program:** Enter the program number.
- Fund:** Enter the fund code.
- Speedchart:** Abbreviation of a combination of Dept/Program/Fund or Project/Program/Fund. This will enable the user to select a valid Dept/Program/Fund or Project/Program/Fund without having to enter each field separately.

If all the information entered appears correct, **Click OK**

You should be back to the Maintain Requisitions Screen

Oracle
Home | Vendors | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions | New Window | Help | Personalize Page

Maintain Requisitions
Requisition

Business Unit: FROST
Requisition ID: NEXT
Requisition Name: [Copy From]
Status: Open
Budget Status: Not Chk'd
Hold From Further Processing

Header

*Requester: k.warrick | Krista A Warrick
*Requisition Date: 05/08/2015 | Requisition Info
Origin: ONL | Accounts Payable Vouchers
*Currency Code: USD | Dollar
Accounting Date: 05/08/2015

Requisition Defaults | Add Comments | Amount Summary

Total Amount: 500.00 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0	EA	2 WAY	0	500.00	Open

View Printable Version | View Approvals | *Go to ... More... | Add | Update/Display

Item: Enter item to be requested by clicking on the magnifying glass.

Description: The populated data can be deleted and then you can enter a full description of the item you are purchasing

Quantity: Enter the full quantity of the item requested.

Unit of Measure: Unit of measure is defaulted. If the UOM is different for this item, use the magnifying glass to choose a different unit of measure.

Category: This will default from the item selected.

Price: Enter the price for each unit, not the total price of the items, but rather the individual cost of each item. The system will calculate the total of the requisition.

Check or Change Line Distributions using Icons

ORACLE Home Worklist Add to Favorites Sign out

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions New Window Help Personalize Page

Maintain Requisitions

Requisition

Business Unit FROST Status Open
Requisition ID NEXT Budget Status Not Chk'd
Requisition Name Copy From Hold From Further Processing

Header

*Requester k.warmick Krista A Warmick
*Requisition Date 05/08/2015 Requisition Info
Origin ONL Accounts Payable Vouchers
*Currency Code USD Dollar
Accounting Date 05/08/2015

Requestion Defaults Add Comments Amount Summary
Requestion Activities

Total Amount 500.00 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0	EA	2 WAY	0	500.00 Open	

View Printable Version View Approvals *Go to ... More...

Save Refresh Add Update/Display

Click the **Schedule** icon

ORACLE Home Worklist Add to Favorites Sign out

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions New Window Help Personalize Page

Maintain Requisitions

Schedule

Business Unit FROST Requisition Date 05/08/2015
Requisition ID NEXT Status Open
Return to Main Page

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amt	Status
1	FOOD_SERV_CHART	Contract #100	1.0000	Each			500.00 USD	

Schedule

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	RECV	1.0000	500.00000	500.00		Krista A Warmick	Active

Add Ship To Comments

Save Refresh Add Update/Display

Click the **Distribution** icon

Distribution Details Screen

Distribution Details

Maintain Requisitions

Distribution

Requisition ID: NEXT
Line: 1
Schedule: 1

Item: FOOD_SERV_CHARTWEL Contract #100
Status: Active

Ship To: RECV
Distribute By: Quantity
SpeedChart: Multi-SpeedCharts

Quantity: 1 0000 EA
Open Quantity: 1 0000
Merchandise Amt: 500.00 USD

Distributions

Personalize | Find | View All | First | 1 of 1 | Last

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Dept	PC Bus Unit	Project	Activity	Account	Program	Fund
1	Open	100.0000	1 0000	500.00	FROSTQ					081100		

OK Cancel Refresh

You can add lines to distribute between various departments by clicking the +

*If you use Speedchart on the line distribution, the system will wipe out Quantity & Account, so please note the account that was populated from the entered "Item".

The quantity & account will need to be added back.

When finished, Click OK to get back then click "Return to Main Page"

Click on the blue hyperlink [Add Comments](#) in the Header Section

Header Comments

Business Unit FROST Requisition Date 05/04/2015
Requisition ID NEXT Status Open

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments Find | View All First 1 of 1 Last
Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt
☐ Show at Voucher ☐ Approval Justification

Associated Document
Attachment Attach View Delete Email

From -> REQ FROST-NEXT

OK Cancel Refresh

Enter comments in the comment box.

Please include things such as:

- Requesting Department Name and phone number
- If the PO needs fax or emailed, please indicate that along with the fax number/email address and Name of contact person.
- Any other information you want to print on the PO should be entered in the comment box.

Put check marks in the three small boxes under the comment section. IF YOU DO NOT ENTER THE CHECK MARKS, COMMENTS WILL NOT PRINT!

Click: OK

Attachments

Header Comments

Business Unit FROST Requisition Date 05/04/2015
Requisition ID NEXT Status Open

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last
Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt
☐ Show at Voucher ☐ Approval Justification

Associated Document

Attachment
Attach View Delete Email

From -> REQ FROST-NEXT

OK Cancel Refresh

You have the option to place an attachment on your requisition.

This is a great place to add a copy of a quote or any other supporting documentation you may have.

Click: **Edit Comments**

Click: **Attach**

Click: **Browse**

Now locate the document you want to attach and click **UPLOAD**.

If you add an attachment you need to indicate that in the comment box along with your other comments.

Click: **OK**

You have now entered all the information requested.

If everything is entered correctly you can Click **SAVE**.

You should now have Requisition # under Requisition ID.

The screenshot shows the Oracle Requisition form. The 'Header' section contains the following fields:

- Business Unit: FROST
- Requisition ID: 0000028057 (An arrow points to this field)
- Requisition Name: 0000028057
- Status: Open
- Budget Status: Not Ch'd
- Copy From: (empty)
- Hold From Further Processing: (checkbox)

Below the header, there are sections for 'Requester' (Krista A Warrick), 'Requisition Date' (05/08/2015), 'Origin' (ONL), 'Currency Code' (USD), and 'Accounting Date' (05/08/2015). There are also links for 'Request Defaults', 'Add Comments', 'Request Activities', and 'Custom Fields'.

The 'Amount Summary' section shows a 'Total Amount' of 500.00 USD.

The 'Select Lines To Display' section has a search bar and a 'Retrieve' button.

The 'Line' table shows one line item:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	FOOD_SERV_CHARTY	Contract #100	1.0000	EA	2 WAY	500.00000	500.00	Open

At the bottom, there are buttons for 'Save', 'Refresh', 'Add', and 'Update/Display'.

At this point the requisition is ready to be approved.

NEW STEPS!!

You as the requestor will now budget check the requisition before sending it to your supervisor for approval.

Oracle Requisitions interface showing a requisition with the following details:

- Business Unit: FROST
- Requisition ID: 0000028057
- Requisition Name: 0000028057
- Status: Open
- Budget Status: Not Chkd
- Hold From Further Processing: ☐
- *Requester: kawamick (Krista A Warnick)
- *Requisition Date: 05/08/2015
- Origin: ONL
- *Currency Code: USD (Dollar)
- Accounting Date: 05/08/2015
- Amount Summary: Total Amount 500.00 USD
- Select Lines To Display: Search for Lines
- Line 1: FOOD_SERV_CHARTWQ, Contract #100, Quantity 1.0000, UOM EA, Category 2 WAY, Price 500.00000, Merchandise Amount 500.00, Status Open

Click the Budget Check icon

ORACLE

Home Worklist Add to Favorites Sign out

Favorites Main Menu Purchasing Requisitions Add/Update Requisitions

New Window Help Personalize Page

Maintain Requisitions

Requisition

Business Unit FROST
 Requisition ID 0000028057
 Requisition Name 0000028057

Status Open ☒ ☐
 Budget Status Valid ☒ ☐ Hold From Further Processing

Header

*Requester kswarnick Krista A Warnick
 *Requisition Date 05/08/2015 Requisition Info
 Origin ONL Accounts Payable Vouchers
 *Currency Code USD Dollar
 Accounting Date 05/08/2015

Requisition Defaults
 Requisition Activities
 Document Status

Add Comments

Amount Summary

Total Amount 500.00 USD
 Pre-Encumbrance Balance 500.00 USD

Select Lines To Display

Search for Lines
 Line To Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	FOOD_SERV_CHARTA	Contract #100	1.0000	EA	2 WAY	500.00000	500.00	Open

View Printable Version View Approvals

Save Return to Search Refresh

Add Update Display

Budget Status should now be "Valid"

If the requisition fails budget check you must contact the budget office (Denise x4593) before sending the requisition on for approval.

Submit for Approval

The screenshot shows the Oracle Requisition form. At the top, the Oracle logo is visible. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions. The page title is 'Maintain Requisitions' and 'Requisition'. The form fields include: Business Unit: FROST, Requisition ID: 0000028057, Requisition Name: 0000028057. The Status is 'Open' (checked) and Budget Status is 'Valid' (checked). There is a 'Hold From Further Processing' checkbox. The 'Header' section includes: *Requester: klawmick, *Requestion Date: 05/08/2015, Origin: ONL, *Currency Code: USD, Accounting Date: 05/08/2015. The 'Amount Summary' section shows: Total Amount: 500.00 USD, Pre-Encumbrance Balance: 500.00 USD. The 'Select Lines To Display' section has a search bar and a 'Retrieve' button. The 'Line' table has one row: Line 1, Item FOOD_SERV_CHARTW, Description Contract #100, Quantity 1.0000, UOM EA, Category 2 WAY, Price 500.00000, Merchandise Amount 500.00, Status Open. The bottom of the form has buttons: Save, Return to Search, Refresh, Add, and Upload Attachments. A red arrow points from the 'Submit for Approval' icon (a green checkmark) to the 'Status' field.

Once the requisition has been budget checked and the status is “Valid” you need to submit it for approval.

Click the “Submit for Approval” icon (✓)

Once you submit for approval the status changes to "Pending." The requisition will automatically be sent to the approver assigned to the department/project being charged.

The screenshot shows the Oracle Requisition system interface. At the top, the Oracle logo is visible. The navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. The breadcrumb trail shows: Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions. The status of the requisition is displayed as 'Status: Pending' and 'Budget Status: Valid'. A red 'X' icon is next to the 'Status: Pending' text. Below this, there is a checkbox for 'Hold From Further Processing'. The 'Header' section contains fields for Business Unit (FROST), Requisition ID (0000028059), and Requisition Name (0000028059). The 'Requester' field shows 'kawarnick' and 'Krista A Warnick'. The 'Requisition Date' is '05/12/2015'. The 'Origin' is 'ONL' and 'Accounts Payable Vouchers'. The 'Currency Code' is 'USD' and 'Dollar'. The 'Accounting Date' is '05/12/2015'. The 'Amount Summary' section shows 'Total Amount: 100.00 USD' and 'Pre-Encumbrance Balance: 100.00 USD'. The 'Select Lines To Display' section shows 'Search for Lines' and 'Retrieve'. The 'Line' table shows one line item: '1 SUPL_OFFICE Toner Cartridge' with a quantity of '1.0000', a price of '100.00000', and a status of 'Pending'. The bottom of the screen has buttons for 'Save', 'Return to Search', 'Refresh', 'Add', and 'Update/Display'.

When the requisition is approved you will receive email notification.

The screenshot shows an email notification from Alan R Snyder to Krista Warnick. The subject line is 'Requisition ID "0000028059" Business Unit "FROSTBURG ST UNIVERSITY" Has Been "Approved" - Message (Plain Text)'. The email body contains the following information: 'The following requisition has been "Approved". Requester: kawarnick, Business Unit: FROSTBURG ST UNIVERSITY, Requisition ID: 0000028059, Requisition Name: 0000028059, Date: 2015-05-12'. It also includes a link to navigate directly to the approval page: https://fin9devweb.frostburg.edu/psp/FINDEV/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_APPROVAL.GBL?Action=U&BUSINESS_UNIT=FROST&REQ_ID=0000028059. The email was sent on Tue 5/12/2015 10:55.

Printing Requisition

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit FROST
Requisition ID 0000028057
Requisition Name 0000028057

Status Open ☒ ☐
Budget Status Valid

☐ Hold From Further Processing

Header

*Requester kawarnick Krista A Warnick
*Requisition Date 05/08/2015
Origin ONL Accounts Payable Vouchers
*Currency Code USD Dollar
Accounting Date 05/08/2015

Requester Info

Requestion Defaults
Requestion Activities
Document Status

Add Comments

Amount Summary

Total Amount	500.00 USD
Pre-Encumbrance Balance	500.00 USD

Select Lines To Display

Search for Lines

Line To Retrieve

Line

Personalize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	FOOD_SERV_CHARTW	Contract #100	1.0000	EA	2 WAY	500.00000	500.00	Open

View Printable Version | View Approvals

*Go to ...More...

Save | Return to Search | Refresh

Add | Update History

If you wish to print the requisition click the [View Printable Version](#) blue hyperlink

Canceling a Requisition

Navigation	<i>Purchasing>Requisitions> Add/Update Requisitions>Find an Existing Value</i>
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The screenshot shows the Oracle Requisition system interface. At the top, there is a navigation bar with the Oracle logo and links like Home, Worklist, Add to Favorites, and Sign out. Below this is a breadcrumb trail: Purchasing > Requisitions > Add/Update Requisitions. The main area is titled 'Maintain Requisitions' and 'Requisition'. It displays fields for Business Unit (FROST), Requisition ID (0000028057), and Requisition Name (0000028057). There are tabs for Header, Amount Summary, and Select Lines To Display. The Header tab is active, showing fields for Requester (kawarnick), Requisition Date (05/09/2015), Origin (ONL), Currency Code (USD), and Accounting Date (05/09/2015). The Amount Summary tab shows Total Amount (500.00 USD) and Pre-Encumbrance Balance (500.00 USD). The Select Lines To Display tab shows a table with columns: Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The table contains one line item: Line 1, Item FOOD_SERV_CHART, Description Contract #100, Quantity 1.0000, UOM EA, Category 2 WAY, Price 500.00000, Merchandise Amount 500.00, and Status Open. At the bottom, there are buttons for Save, Return to Search, Refresh, Add, and Update/Cancel. A large red 'X' is drawn over the 'Cancel' button.

In order to Cancel a Requisition you must be looking at the Requisition you want to cancel. If you have been working the Requisition and it is still in front of you then you can proceed directly to Cancel. If not, use the navigation steps above to Find an Existing Value. Enter the Requisition ID (remember to always add 00000 before your requisition ID) and proceed to cancel.

Verify that the Requisition in front of you is the Requisition you wish to delete.

Click the Cancel button (looks like a big **X**)

You will get a message that asks if you want to proceed, if so, click Yes.

The Cancel takes effect the minute you click Yes.

Tracking the Approval Process

You can now see where the requisition is in the approval process by clicking the [View Approvals](#) hyperlink

The screenshot displays the Oracle Requisition system interface. At the top, the Oracle logo is visible. The navigation bar includes links for Home, Worklist, Add to Favorites, and Sign out. The breadcrumb trail shows: Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions. The page title is "Maintain Requisitions".

The "Requisition" section shows the following details:

- Business Unit: FROST
- Requisition ID: 0000028031
- Requisition Name: 0000028031
- Status: Pending (marked with a red X)
- Budget Status: Valid
- Hold From Further Processing: ☐

The "Header" section includes the following fields:

- *Requester: cboone (Carla L. Boone)
- *Requisition Date: 02/25/2015
- Origin: ONL
- *Currency Code: USD (Dollar)
- Accounting Date: 02/25/2015

On the left, there are links for "Requestion Defaults", "Requestion Activities", and "Document Status". In the center, there is an "Add Comments" button. On the right, the "Amount Summary" section shows:

- Total Amount: 2,500.00 USD
- Pre-Encumbrance Balance: 2,500.00 USD

Below the amount summary is the "Select Lines To Display" section, which includes a "Search for Lines" field and a "Retrieve" button.

The "Line" section displays a table with the following columns: Line, Item, Description, Quantity, *UOM, Category, Price, Merchandise Amount, and Status. The table contains one line item:

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	SERV_OTHER	Blanket PO for Cable	1.0000	YRS	2 WAY	2,500.0000	2,500.00	Pending

At the bottom left, there are links for "View Printable Version", "View Approvals" (highlighted with a red arrow), "Save", "Return to Search", and "Refresh". At the bottom right, there are links for "Add" and "Update/Reply".

Window opens to show if the requisition has been approved by the Dept Manager
The example below is pending approval.

The screenshot shows the Oracle View Approvals window for Requisition 0000028031. The window is titled "View Approvals" and contains the following information:

- Business Unit:** FROST
- Requisition ID:** 0000028031
- Requisition Name:** 0000028031
- Requested For:** Carla L. Boone
- Status:** Pending
- Budget Status:** Valid
- Number of Lines:** 1
- Total Amount:** 2,500.00 USD

The window also displays the "Dept Manager" section, which shows "Line 1: Pending" and "Multiple Approvers: Dept Manager - Approver". The "Final Notification" section shows "Requisition 0000028031: Awaiting Further Approvals" and "Not Routed: Krista A. Warrick".

Example below shows requisition has been approved and sent to Krista to be rolled to a PO.

The screenshot shows the Oracle View Approvals window for Requisition 0000028067. The window is titled "View Approvals" and contains the following information:

- Business Unit:** FROST
- Requisition ID:** 0000028067
- Requisition Name:** 0000028067
- Requested For:** Krista A. Warrick
- Status:** Approved
- Budget Status:** Valid
- Number of Lines:** 1
- Total Amount:** 100.00 USD

The window also displays the "Dept Manager" section, which shows "Line 1: Approved" and "Contract #100". The "Final Notification" section shows "Requisition 0000028067: Approved".

Tracking the Requisition through Document Status

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit: FROST
 Requisition ID: 0000028540
 Requisition Name: 0000028540

Status: Approved
 Budget Status: Valid

☐ Hold From Further Processing

Header

*Requester: kawarnick Krista A Warnick
 *Requisition Date: 04/20/2015
 Origin: ONL
 Currency Code: USD
 Accounting Date: 04/20/2015

Requester Info: Accounts Payable Vouchers
 Dollar

Requisition Defaults
 Requisition Activities
 Document Status

Edit Comments

Amount Summary

Total Amount: 579.00 USD
 Pre-Encumbrance Balance: 0.00 USD

Select Lines To Display

Search for Lines
 Line To Retrieve

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	COMP_ADD_ADM_LT_5K	IPad Air 2 Wi-Fi 64GB Silver	1.0000	EA	3 WAY	579.00000	579.00	Approved

View Printable Version

*Go to ... More

Save | Return to Search | Previous in List | Next in List | Notify | Refresh

Add | Update Display

On the Requisition page, Click on Document Status. It will show the following:

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions | Document Status

New Window | Help | Personalize Page

Document Status

Business Unit: FROST
 Document Date: 04/20/2015
 Currency: USD
 Requester: Krista A Warnick

Req ID: 0000028540
 Status: Approved
 Document Type: Requisition
 Merchandise Amt: 579.00
 Budget Status: Valid

Associated Document

Personalize | Find | View All | First | 1-3 of 3 | Last

Documents	Related Info	FF					
Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	FROST	Purchase Order	0000028691	Dispatched	04/21/2015	1000000976	000
▼ Actions	FROST	Receipt	0000008109	Received	04/24/2015	1000000976	000
▼ Actions	FROST	Voucher	00139147	Posted	04/22/2015	1000000976	000

Return to Search

PO Activity Summary

Navigation

Purchase Order>Review PO Information>Activity Summary

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Purchase Orders | Review PO Information | Activity Summary

New Window | Help

PO Activity Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: FROST

PO Number: begins with

Purchase Order Date:

Purchase Order Reference: begins with

Supplier ID: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

Enter the PO Number & Click Search

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Purchase Orders | Review PO Information | Activity Summary

New Window | Help | Personalize Page

Activity Summary

Business Unit: FROST PO Status: Dispatched

Purchase Order: 0000028691 Supplier: APPLE COMPUTER INC

Supplier Location: 000

Merchandise Amount	579.00 USD
Merchandise Receipt	579.00 USD
Merchandise Returned	0.00 USD
Merchandise Invoice	579.00 USD
Merchandise Matched	579.00 USD

Lines

Personalize | Find | View All | First | 1 of 1 | Last

Details | Receipt | Invoice | Matched | RIV | INV

Line	Item	Item Description	UOM	Manufacturer ID	Mfg
1	COMP_ADD_ADM_LT_5K	iPad Air 2 Wi-Fi 64GB Silver	EA		

Return to Search Notify

On the Invoice Tab, you can view what has been invoiced. The Receipt tab will show if the item has been received.

To see the information you must now use the slide bar.

THE NEXT SECTION CONTAINS INSTRUCTIONS
ON HOW
THE APPROVER/MANAGER
SHOULD APPROVE THE REQUISITION

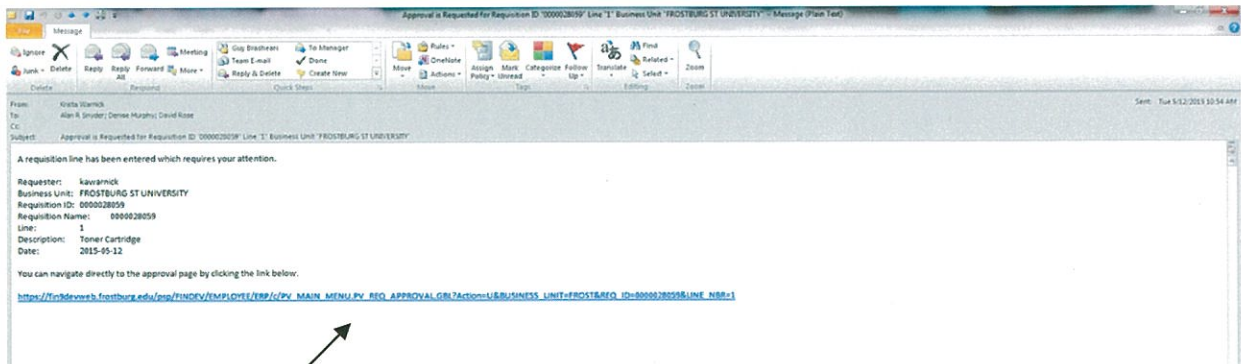
Instructions to Approve a Requisition

Approval

Requisition approvals must be done by someone who is set up with 'Approval' authority in PeopleSoft and maintains the Manager or PI status. Approvers are not permitted to add requisitions. Conversely, requesters are not permitted to approve requisitions.

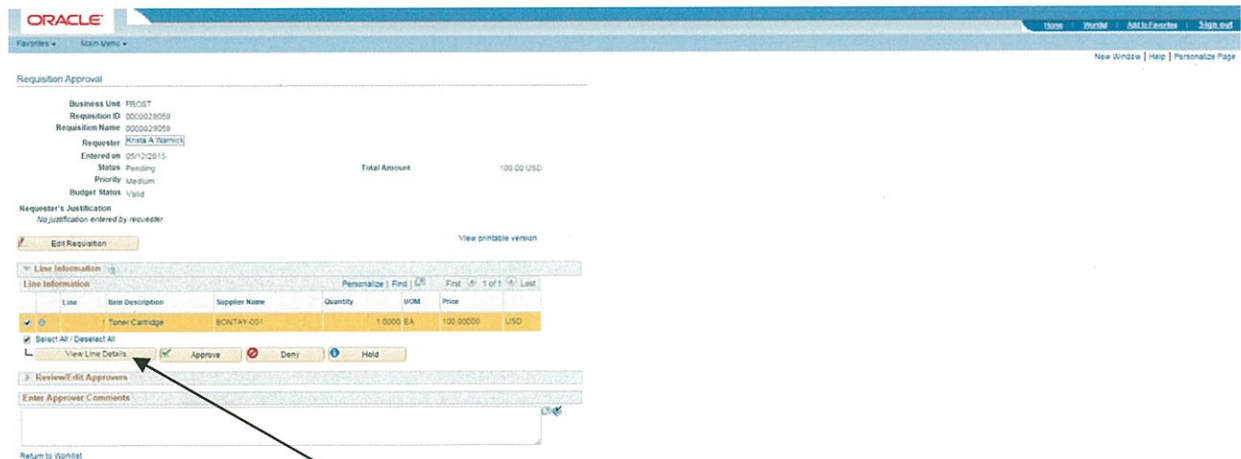
The Approval process is fairly simple!

When the requisition has been submitted for approval, it will generate an email notification.



Click on the link

The requisition will then appear



You can see where the requisition is being charged by clicking View Line Details

The following screen appears showing the distribution details.

Business Unit: FROST		Requester: K.warrick		Status: Pending Approval	
Requisition: 0000028068		Requested By: Krista A Warrick		Currency: USD	
Requisition Name: 0000028068		Entered Date: 5/27/15		Requisition Total: 100.00	
Line: 1	Item Description: Copy Paper	Quantity: 2.0000	UOM: CS	Price: 50.00	Line Total: 100.00
				Line Status: Pending	

Ship Line: 1	Ship To: RECV	Address:	Shipping Quantity: 2.0000
Attention: Krista A Warrick	Due Date:	Central Receiving 101 Braddock Road 123A Stangle Service Building Frostburg MD 21532-2303 United States	Shipping Total: 100.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ST	2.0000	100.00	100.00	FROST	090200

Dept	Fund	Program
1340306	4010	00601

Open QTY	Open Amt
2.0000	0.000

GL Base Amount	Currency	Sequence
100.00	USD	0

You can then continue with approving the requisition

ORACLE

Home | Profile | My Favorites | Sign out

Requisition Approval

Business Unit: FROST
 Requisition ID: 0000028068
 Requisition Name: 0000028068
 Requester: Krista A Warrick
 Entered Date: 05/27/2015
 Status: Pending
 Priority: Medium
 Budget Status: Valid

Total Amount: 100.00 USD

Requester's Justification: No justification entered by requester

[View printable version](#)

[Edit Requisition](#)

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	1 Toner Cartridge	BCENTAY-001	1.0000	EA	100.0000	USD

☒ Select All / ☐ Deselect All

[View Line Details](#) [Approve](#) [Deny](#) [Hold](#)

[Review/Edit Approvals](#)

[Enter Approver Comments](#)

[Return to Worklist](#)

Click "Approve"

You will then get a confirmation screen showing the approval was successful.

The screenshot shows the Oracle Requisition Approval confirmation screen. At the top, the Oracle logo is on the left, and navigation links (Home, Monitor, Add to Favorites, Sign out) are on the right. Below the header, there are links for Favorites and My Menu. The main content area is titled "Requisition Approval" and shows a confirmation message: "0000028059 has been approved." Below this, there is a section for "Review/Edit Approvals" with a "Dept Manager" button. The "Dept Manager" section shows a "Line 1: Approved" status and a "Dept Manager" button. The "Final Notification" section shows a "Requisition 0000028059: Approved" status and a "Self Approved" button. At the bottom left, there is a "Return to Monitor" link.

ORACLE

Home Monitor Add to Favorites Sign out

Favorites My Menu

New Vendors Help Personalize Page

Requisition Approval

Confirmation

✓ 0000028059 has been approved.

Review/Edit Approvals

Dept Manager

Line 1: Approved

Dept Manager

Approved

Alan R. Snyder

Dept Manager - Approver

05-12-15 10:54 AM

Final Notification

Requisition 0000028059: Approved

Final Notification

Self Approved

Alan R. Snyder

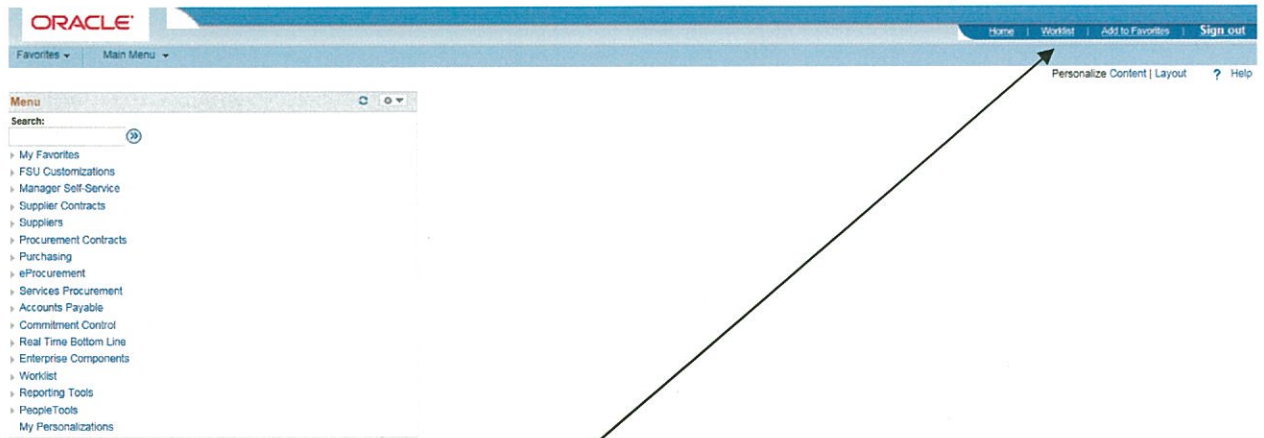
Final Notification

05-12-15 10:54 AM

Return to Monitor

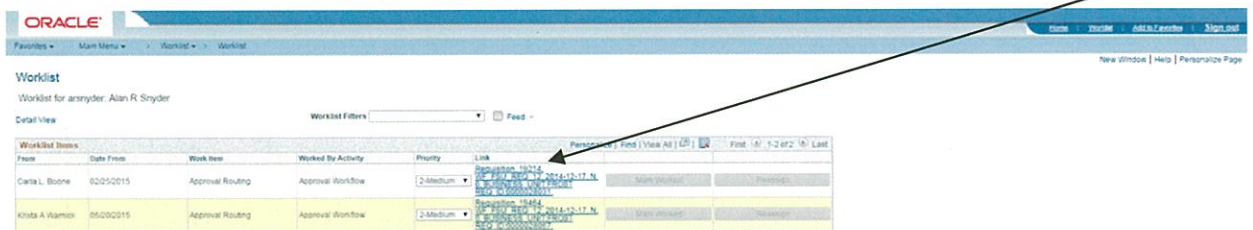
Approving the Requisition using the Worklist.

If the email notification is not available the requisition can be pulled up using the Worklist.



From the Main Menu, Click on Worklist

Requisitions requiring approval will be displayed. Click on the requisition using the Link



The Approval window below will be displayed .

Oracle Requisition Approval window showing details for a requisition. The window includes a header with the Oracle logo and navigation links. The main content area displays the requisition summary, including Business Unit, Requisition ID, Requisition Name, Requester, Entered on, Status, Priority, Budget Status, and Total Amount. Below this is a section for 'Requester's Justification' with a text area. The 'Line Information' section displays a table with columns: Line, Item Description, Supplier Name, Quantity, UOM, Price, and Currency. A single line is shown: Line 1, Item Description '1 Toner Cartridge', Supplier Name 'BONTA1-001', Quantity '1.0000', UOM 'EA', Price '150.00000', and Currency 'USD'. Below the table are buttons for 'Select All / Deselect All', 'View Line Details', 'Approve', 'Deny', and 'Hold'. At the bottom, there is a 'Review/Edit Approvers' section and an 'Enter Approver Comments' text area. The window has a standard Oracle header with 'ORACLE' logo and navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'.

You can then look at the line details and approve the requisition using the same steps as on page 1 & 2.