

General Information

Task	Process Information
Creating an eProcurement Special Request Requisition	A requisition created in the eProcurement module for all goods/services.

Related Documents

The document(s) listed below are supporting materials for this process. These materials are posted on Courtnet – under the GEARS link.

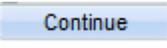
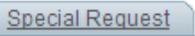
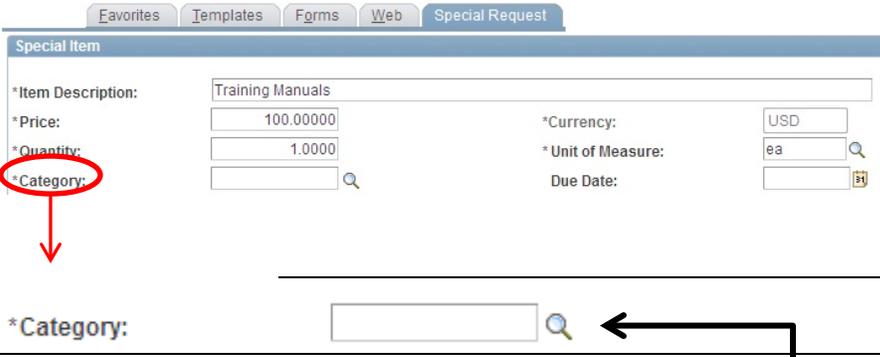
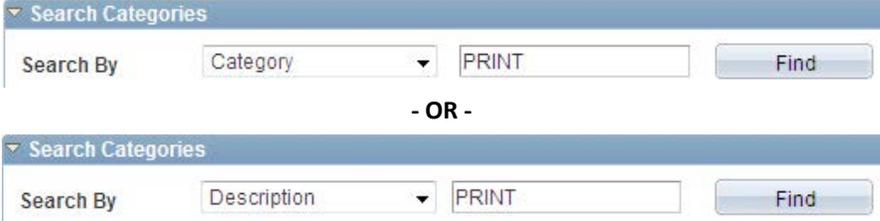
- PO220 Purchasing Goods & Services – Course Manual

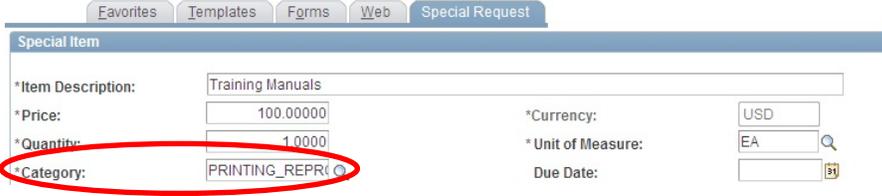
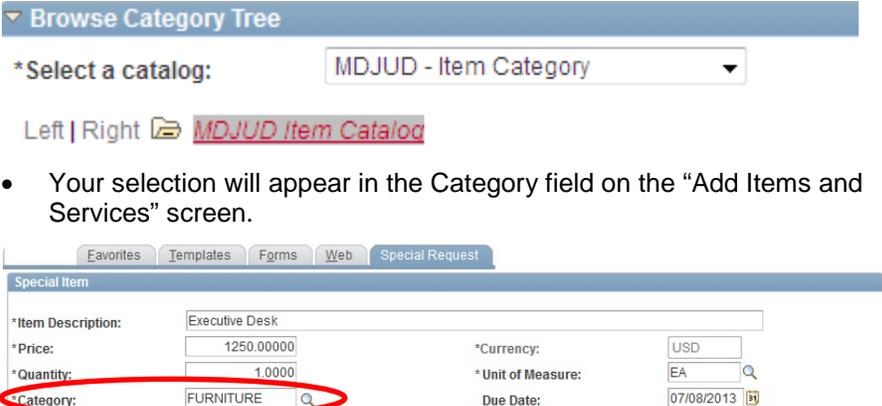
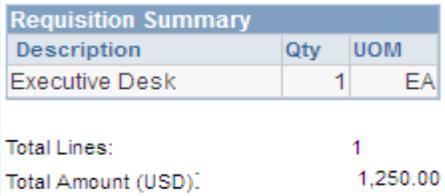
GEARS Navigation

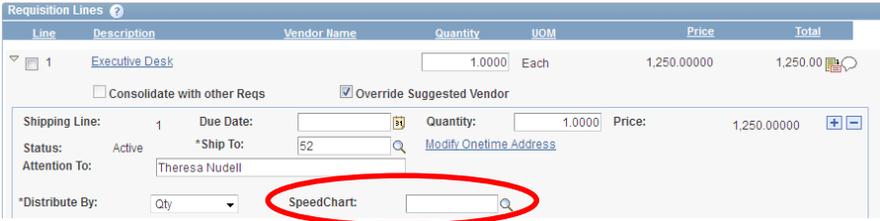
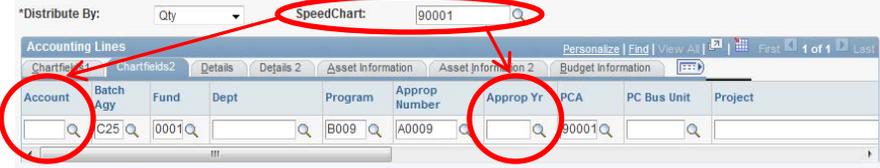
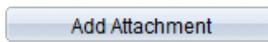
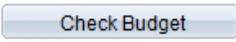
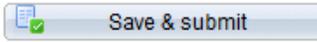
<p>eProcurement > Create Requisition</p>	 <p>The screenshot shows the Oracle eProcurement interface. At the top is the Oracle logo. Below it is a 'Menu - Classic' section. Under 'eProcurement', there are three items: 'Buyer Center', 'Manage ERP Integration', and 'Create Requisition'. The 'Create Requisition' item is highlighted with a blue background.</p>
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	On the  1. Define Requisition screen	Define your requisition by giving it a name. Requisition Name: <input type="text"/>
2.	Click the  Continue button.	
3.	On the  2. Add Items and Services screen	Under the  Special Request tab, Select the  Special Item link.
4.	Add items and services	Fill in all fields marked with an asterisk.  <p>*Category: <input type="text"/> </p> <p> You can search for the Category by selecting the magnifying glass.</p>
5.	On the  Look Up Category screen	Either  Search Categories or  Browse Category Tree to look up the appropriate category for your requisition.
5a.	To  Search Categories	<ul style="list-style-type: none"> Use the “Search By” dropdown list to search for goods/services by Category or by Description and then enter the item you wish to procure.  <ul style="list-style-type: none"> Click the  Find button to return a list of results based on your entry.

		<ul style="list-style-type: none"> Select the row containing the good/service you wish to procure.  <table border="1"> <thead> <tr> <th>Categories</th> <th>Catalog</th> <th>Category</th> <th>Description</th> <th>Find in Tree</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>ITM_CATALOG_MDJUD</td> <td>PRINTING</td> <td>Printing</td> <td></td> </tr> <tr> <td>2</td> <td>ITM_CATALOG_MDJUD</td> <td>PRINT_ENVELOPE</td> <td>Printing - Envelopes</td> <td></td> </tr> <tr> <td>3</td> <td>ITM_CATALOG_MDJUD</td> <td>PRINTING_REPRO</td> <td>Printing & Reproduction</td> <td></td> </tr> <tr> <td>4</td> <td>ITM_CATALOG_MDJUD</td> <td>PRINT_LEGAL</td> <td>Printing- Legal Documents</td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> Your selection will appear in the Category field on the "Add Items and Services" screen.  <p>Special Item</p> <p>*Item Description: Training Manuals</p> <p>*Price: 100.00000</p> <p>*Quantity: 1.0000</p> <p>*Category: PRINTING_REPRO</p> <p>*Currency: USD</p> <p>*Unit of Measure: EA</p> <p>Due Date:</p>	Categories	Catalog	Category	Description	Find in Tree	1	ITM_CATALOG_MDJUD	PRINTING	Printing		2	ITM_CATALOG_MDJUD	PRINT_ENVELOPE	Printing - Envelopes		3	ITM_CATALOG_MDJUD	PRINTING_REPRO	Printing & Reproduction		4	ITM_CATALOG_MDJUD	PRINT_LEGAL	Printing- Legal Documents	
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<p>5b.</p>	<p>To Browse Category Tree</p>	<ul style="list-style-type: none"> Expand the section by clicking the Select a catalog from the dropdown list and click the to browse the categories within.  <p>Browse Category Tree</p> <p>*Select a catalog: MDJUD - Item Category</p> <p>Left Right MDJUD Item Catalog</p> <p>Special Item</p> <p>*Item Description: Executive Desk</p> <p>*Price: 1250.00000</p> <p>*Quantity: 1.0000</p> <p>*Category: FURNITURE</p> <p>*Currency: USD</p> <p>*Unit of Measure: EA</p> <p>Due Date: 07/08/2013</p>																									
<p>6.</p>	<p>Click the Add Item button.</p>																										
<p>7.</p>	<p></p> <p>Confirm your selections in the cart.</p>	 <table border="1"> <thead> <tr> <th colspan="3">Requisition Summary</th> </tr> <tr> <th>Description</th> <th>Qty</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td>Executive Desk</td> <td>1</td> <td>EA</td> </tr> <tr> <td colspan="2">Total Lines:</td> <td>1</td> </tr> <tr> <td colspan="2">Total Amount (USD):</td> <td>1,250.00</td> </tr> </tbody> </table>	Requisition Summary			Description	Qty	UOM	Executive Desk	1	EA	Total Lines:		1	Total Amount (USD):		1,250.00										
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<p>8.</p>	<p>Click the 3. Review and Submit link</p>	
<p>9.</p>	<p>On the  screen confirm Requisition Lines</p>	<ul style="list-style-type: none"> Confirm required fields for the requisition line item by clicking the  to expand the section. Note: The “Account” (i.e. sub-object) field in the  tab will default in based on the selected item category.
<p>10.</p>	<p>Enter Accounting Line information</p> <ul style="list-style-type: none"> Select your PCA (SpeedChart Key) from the SpeedChart field using the magnifying glass icon.  <ul style="list-style-type: none"> Note: the selection of a SpeedChart will fill in your accounting codes in the  tab with the exception of the “Account” (i.e. sub-object) and “Approp Yr” (i.e. fiscal year) - you will need to enter both.  <ul style="list-style-type: none"> Confirm that the correct   “Accounting Lines” information has been entered. 	
<p>11.</p>	<p>Enter Line Comments/Attachments</p> <ul style="list-style-type: none"> To add comments or attachments about line items, select the  icon at the far right of the line. Enter comments into the text box and/or click the  button to add an attachment. 	
<p>12.</p>	<p>Check budget for available funds by clicking the  button.</p>	
<p>13.</p>	<p>Save the Requisition by clicking the  button.</p>	

 **Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.