ORACLE REQUISITIONING

Users have specific responsibilities (authorizations) based on activity (departmental) codes as determined by the Budget Office.

| Main Menu Personalize MYIT Employee Self-Service NYIT RA COS |
|--|
| Personalize |
| <u>NYIT Employee Self-Service</u> <u>NYIT RA COS</u> |
| Notifications Summary Supplier Item Cataloq Item Search Requisitions Requisitions Budget Inquiry NYIT GL 1 |

Select "REQUISITIONS"

| Oracle Applications - RPT (Copy of PROD as of 2017-10-30, 00:30 AM) | |
|---|--|
| Eile Edit View Folder Tools Actions Window Help | |
| [≓\$ `> `> ⁽) | |
| C Requisitions - [New] ∠ | |
| Num Type Item Rev Category Description UOM (C []) Image: Imag | |
| Destination Type Source Requester Supplier Organization Site Location Contact Subinventory Phone Distributions Approve | |
| Notifications Summary Supplier Item Catalog Item Search Requisitions Requisitions Summary + Budget Inquiry | |
| Qpen | |
| | |

In the screen, enter the following information:

• DESCRIPTION (description of project or any additional information that Procurement may need)

• Put cursor on TYPE in the LINES tab – you will see three dots (...). Move cursor over the dots and a list of values will appear. Select the most appropriate description for the requisition.

| Lines | Source De | etails C | Details | Currer | ісу | | | , 1 |
|----------|---------------------|----------|------------|---------|----------------|----------------|---------|------------|
| Num | Туре | ltem | | Rev | Category | Description | UOM (| |
| 1 | | | | | | | | A |
| | Line Types 🖂 | | | -0-0-0- | | ~~~~ × | | |
| | | | | | | | | |
| | Find <mark>%</mark> | | | | | | | |
| | Line Type | _ | Value Basi | e | Purchase Basis | Description | | ╡Ļ |
| | Consulting | | Amount | 3 | Services | Consulting Se | Ď | -~ I |
| Destinat | Contracts | | Amount | | Services | Contracts | | |
| Destinat | Goods | | Quantity | | Goods | All goods that | | _ |
| R | Service | | Amount | | Services | Professional : | | _ |
| Orga | | | | | | | | _ |
| | | | | | | | | _ |
| Subi | | | | | | | | - 11 |
| | | | | | | | Approve | |
| | | | | | | | Tobleve | |
| | | | | | | | | |
| Not | | | | | | D | | |
| Sup | | | | _ | | | | |
| lten | | | Eind | 0 | K Cancel | | | |
| i Req | uisitions | | | | | | | |
| Rea | uisitions Sum | marv | | | | | | |

NOTE: fields that are highlighted with yellow are MANDATORY and must be entered.

• Put cursor on CATEGORY in the LINES tab – Click on the dots and a list of values will appear. Select the most appropriate description.

| d <mark>%</mark> | | |
|------------------|---|--|
| em Category | Description | |
| AB010 | Animal Equipment & Supplies, Misc. | |
| AB020 | Animals, Live | |
| AB030 | Laboratory Equipment, Misc. | |
| AB040 | Repair/Maint., Misc.: Lab Equipment | |
| AB050 | Chemicals, Biologicals, etc. | |
| AB060 | Laboratory Supplies | |
| ED010 | X-Ray Equipment & Supplies, Misc. | |
| ED020 | Film X-Ray | |
| ED030 | Repair/Maint., Misc.: X-Ray Equip. | |
| ED040 | Drugs, Pharmaceuticals, Biologicals & Cont. Subs. | |
| ED050 | Medical & Dental Supplies | |
| FF010 | Office Equipment, Misc. | |
| FF020 | Office Supplies | |
| FF030 | Rent/Lease: Copiers | |
| FF040 | Repair of Equipment | |
| | | |
| | Eind QK Cancel | |

Hit "OK"

Enter the line item description for the item you are requesting. Include manufacturer, model number, and any additional information required to place the order with the vendor.

| 2 70 | | | |
|------------|----------|-------------|--|
| nit | Class | Description | |
| UBIC METER | VOLUME | CUBIC METER | |
| UBIC YARD | VOLUME | CUBIC YARD | |
| OZEN | QUANTITY | DOZEN | |
| ACH | QUANTITY | EACH | |
| TOOT | LENGTH | FOOT | |
| GALLON | FLUID | GALLON | |
| GRAM | WEIGHT | GRAM | |
| GROSS | QUANTITY | GROSS | |
| HOUR | TIME | HOUR | |
| INCH | LENGTH | INCH | |
| KILOGRAM | WEIGHT | KILOGRAM | |
| LITER | FLUID | LITER | |
| METER | LENGTH | METER | |
| | | | |

Enter unit of measure (UOM) from the list of values If the LINE TYPE is "GOODS".

NOTE: The UOM (US DOLLAR) is automatically entered in the system if you select the other LINE TYPE options (service, contract, consulting).

Enter quantity and unit price:

| Linos | Source Det | aile E | Dotaile | Curron | C1/ | | | | | |
|-------------|------------------------|--------------|-------------|-------------|------------|------|----------|----------|------|-----|
| Lines | Source Det | | Jetans | Curren | cy | _ | _ | | _ | |
| | | | | | | | | | | |
| Num | Rev | Category | y I | Description | | UOM | Quantity | Price | N€ [| 1 |
| 1 | | OFF020 | [| DYMO label | maker, moo | EACH | 1 | 56.00 | | _A |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | i | 711 |
| | | | | | | | | | i | - F |
| <u> </u> | , (| , | | | | | | | Ð | |
| Destination | Type <mark>Expe</mark> | ense | | | | | | Supplier | | |
| Requ | ester 📃 | | | | | | Supplier | | | |
| Organiz | ation <mark>New</mark> | York Institu | ute of Tech | nology | | | | | | |
| Loc | ation | | | | | | Contact | | | |

ENTER VENDOR INFORMATION FOR THE LINE:

In the SUPPLIER field, select the list of values (...) to locate the supplier name by doing one of the following:

- 1. Enter the wildcard character (%) for a complete list of suppliers.
- 2. Enter the partial supplier name with the wildcard character (%) at the beginning and you will get a list of all suppliers with corp in the name
- 3. Enter a partial name without the wildcard (%) and a list of suppliers which starts with corp will appear

| Supplier | Number | On Hold |
|-----------------------------------|----------|---------|
| Sidpik Corp | 42548 | |
| Sirina Fire Protection Corp | V-026586 | |
| SPECIAL DOOR COMPANY(S.D. CORP) | V-030881 | |
| Stasi Brothers Asphalt Corp | 35882 | |
| StataCorp LLC | V-030589 | |
| STATE MATERIAL MASON SUPPLY CORP. | V-017247 | |
| Stryder Corp. | 43881 | |
| Supplies on Demand, Corp | 41458 | |
| Symantec Corporation | 43579 | |
| T.W. Smith Corp | 40747 | |
| Techsmith Corporation | V-029095 | - * · |
| Teresa Corp. | 39569 | |
| Testing Mechanics Corp | V-03308 | |
| | | |

Enter the site information for the vendor by selecting the list of values (...). If only one address exists for the supplier, the system will automatically populate the information. Otherwise, select the supplier site from the list of values.

NOTE: if a supplier does not appear in the list, contact Procurement Services. The new supplier will need to complete a Vendor Application Packet and Procurement will need to enter this information in Oracle before orders may be placed. For questions or assistance, contact Procurement Services.

| Carlos - [New] Operating Unit Number | Type Purchase Requi Preparer | |
|--|---|---|
| Description | Status Incomplete Total USD 56.00 | |
| E Num Description | UOM Quantity Price Need-By [] | |
| | | |
| | | |
| Requester Organization | Supplier Supplies on Demand, Corp Technology Site Remit - PO | |
| Subinventory | Phone Distributions Approve |) |
| | | |
| ı | | |

Click on "DISTRIBUTIONS". Click on CHARGE ACCOUNT and click on the list of values. The following screen will appear:

| ſ | Charge Account | | | | | | × seesees × | |
|---|----------------|--|--|------------|--------|-------|-------------|--|
| - | Activity | | | | | | | |
| | | | | | | | D | |
| | | | | <u>O</u> K | Cancel | Clear | Help | |
| | | | | | | | | |
| | | | | | | | | |

Enter ACTIVITY code and hit TAB on your keyboard; or use the list of values to select the code. Select OK.

| | CONSIDERATION X |
|---------------------|----------------------------------|
| Find <mark>%</mark> | |
| OBJECT CODE | Description |
| 71010 | Instructional Supplies nt [] |
| 71020 | Office Supplies |
| 71030 | Medical Supplies |
| 71031 | Vaccines |
| 71032 | X-rays |
| 71033 | Student Lab Tests |
| 71034 | Shelf Examinations |
| 71040 | Culinary Supplies |
| 71042 | Food |
| 71043 | Bar |
| 71044 | Uniforms |
| 71045 | Instructional Tasting Room |
| 71046 | Flowers |
| 71047 | Music |
| 71048 | Cooking Fuel |
| 71050 | Cleaning Supplies GROUP 0011 CUF |
| | Eind QK Cancel CTIVITY |
| | Distributions OBJECT CODE |

The next screen will appear. Enter the OBJECT CODE and hit the TAB key from the keyboard; otherwise, use the list of values to select the code.

Select OK



SAVE THE REQUISITION!



The APPROVE button will now be enabled and the requisition number will appear.

| P T V V | > 727 | 🗢 👽 🤛 i 200 (p | 1.12 P | - ** * ** | · ~ ~ | 9 . | 1.0 | | | | | |
|----------------|-----------------|--------------------------|--------|------------------|-------|---------|----------------------|----------|--------------|-------|--|--|
| Requisitions | | | | | | | | | | | | |
| Operatin | ng Unit 🛛 🛚 | lew York Institute of Te | | | | | | | | | | |
| | umber | | Туре | Purchase | Requi | Prep | arer | | | | | |
| Desc | ription | | Status | Incomplet | e | | otal US | SD | | 56.00 | | |
| | | | | | | | | | | [| | |
| Lines | Sou | rce Details Details | | Currency | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Num | | Description | UOM | Quantity | Price | N | eed-By | | | | | |
| 1 | | DYMO label maker, moo | EACH | 1 | 56 | | | | | LÊ | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | • | | | | | | | | D | | | |
| Destina | ation Type | Expense | | | | | rce <mark>Su</mark> | pplier | | | | |
| | Requester | | | | | Sup | lier <mark>Su</mark> | pplies o | on Demand, C | orp | | |
| Orç | ganization | New York Institute of | Techno | logy | | | Site <mark>Re</mark> | mit - PC | D | | | |
| | Location | | | | | Con | act | | | | | |
| Sul | binventory | | | | | Ph | one | | | | | |
| | | | | | _ | | | | | | | |
| | | | | | | Distrib | utions | | Approve | e) | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |

Select APPROVE. The "RESERVE" button will be automatically selected under ENCUMBRANCE and the Requisition will be forwarded to the FINANCIAL REVIEWER. Select OK.

| Use GL Override | Use Document GL Date to Unreserve | Unres Accour | erve Date | | |
|-------------------|-----------------------------------|-----------------|-------------------------|--|--|
| pproval | | | | | |
| Submit for Approv | val | Forward From | Kirschner, Ms. Staci | | |
| Forward | | Approval Path | | | |
| | | Forward To | Financial Reviewer, The | | |
| Note | | | | | |
| Change Summary | | | | | |
| | | | | | |
| ransmission Metho | ds | | C VIII | | |
| <u>Print</u> | EAV Number | | | | |
|) E-Mail | F-Mail Address | | | | |
| None | | | | | |
| | | | | | |
| | | Ōĸ | Cancel | | |
| | | | | | |

If there is sufficient budget, the requisition will be approved to forward to the Financial Approver.

| Decision | | | 85 x | |
|----------|---------------------------|---------------------|-------------|--|
| You | r Budgetary Control actio | n completed success | fully. | |
| | <u>k</u> | View Results | 5 | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |