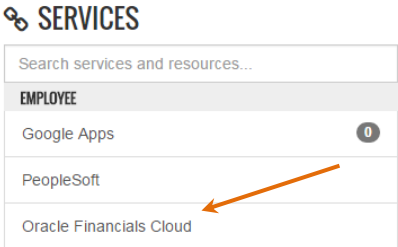

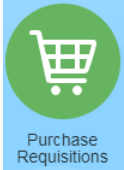
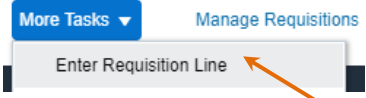





## Creating and Submitting a Standard Requisition

**Purpose:** The Purchasing Department receives requests generated by users for products and services that require a Purchase Order. These requests usually consist of quotes, estimated costs and may require a bidding process. Generally included in these requests are purchases greater than \$2999, software renewal, and service contract renewal.

Step	Action
1.	Begin by signing in to <b>Oracle Fusion Cloud (OFC)</b> from myBoiseState.edu. 
2.	To access the <b>Home Page</b> in OFC, click the house icon at the top of the screen. 
3.	Click the <b>Purchase Requisitions</b> icon on the homepage to access the <b>OFC Procurement</b> module. 
4.	Click <b>More Tasks</b> and select <b>Enter Requisition Line</b> in the upper right hand corner. 
5.	Select <b>Goods or services</b> from the <b>Line Type</b> dropdown. 



Step	Action
6.	<p>Enter <b>Item Description</b>. This field is searchable.  Enter <b>ALL ITEMS</b> into the <b>Category Name</b> field.  Enter <b>Quantity, UOM, and Price</b>.</p> <p>* Item Description <input type="text" value="Searchable Field"/></p> <p>* Category Name <input type="text" value="ALL ITEMS"/></p> <p>* Quantity <input type="text" value="1"/></p> <p>* UOM Name <input type="text" value="EA"/></p> <p>* Price <input type="text" value="100.00"/></p> <p>* Currency <input type="text" value="USD"/></p> <p><b>Protip!</b> If UOM (Unit of Measure) is unknown, enter EA or Each in the UOM drop down.</p>
7.	<p>Enter the name of the <b>Supplier</b>, if known.</p> <p><input type="checkbox"/> New supplier</p> <p>Supplier <input type="text"/></p> <p>Supplier Site <input type="text"/></p> <p>Supplier Contact <input type="text"/></p> <p><b>Note:</b> If the Supplier name is not recognized, click the <b>New supplier</b> check box and input required data. Ensure that the search field is blank prior to entry. Email the <a href="mailto:apsuppliers@boisestate.edu">Substitute W-9 Form</a> to <a href="mailto:apsuppliers@boisestate.edu">apsuppliers@boisestate.edu</a>.</p>
8.	<p><b>Requester:</b> Defaults to the name of the Enterer. The Requester drives the Approval Workflow. This field can be modified as needed.</p> <p><b>Urgent</b> may be updated to <b>Yes</b> for rushed requests. Include details in <b>Notes to Buyer</b>. The date in the <b>Requested Delivery Date</b> field is auto-populated, but may be updated by clicking in the field.</p> <p>* Requester <input type="text" value="Bronco, Bonnie"/></p> <p>Urgent <input type="text" value="No"/></p> <p>Requested Delivery Date <input type="text" value="10/21/16"/></p>


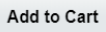

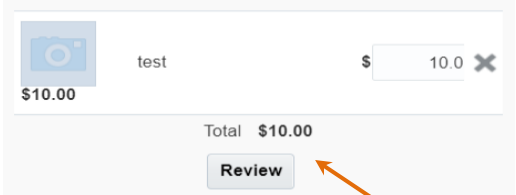
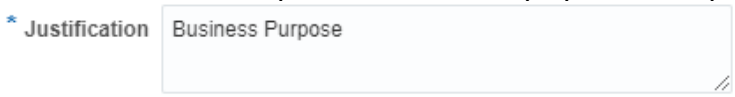
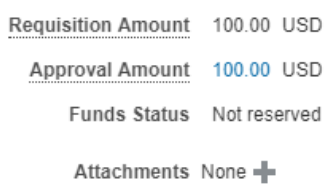


Step	Action																
9.	<p>If the Requisition will be billed to a non-Project funding source, code the transaction on the right side of the Billing distribution lines, using one of three ways.</p> <p>▲ Billing</p> <p>View ▼ Format ▼ X ◀ Freeze Detach Wrap</p> <p>Project Costing Details</p> <table border="1"> <thead> <tr> <th>Project Number</th> <th>Task Number</th> <th>Expenditure Item Date</th> <th>Expenditure Type</th> <th>Expenditure Organization</th> <th>Contract Number</th> <th>Funding Source</th> <th>Charge Account</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>4444.44444.4444444.444444.0000000</td> </tr> </tbody> </table> <p>Select a Funding Source that was entered as a Favorite Funding Source in your user preferences.</p> <p><u>OR</u> Enter the segment string in the Charge Account. (Include all 8 segments separated by .)</p>	Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Charge Account								4444.44444.4444444.444444.0000000
Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Charge Account										
							4444.44444.4444444.444444.0000000										
10.	<p><u>OR</u> Search for and select segments using the search option. </p> <p>Click the <b>Reset</b> button to clear all values, Enter known <b>Segment</b> values, and Select <b>Search</b> for valid funding sources to select from.</p> <p>Charge Account x</p> <p>▲ Hide Segments</p> <p>Fund 3010 Local</p> <p>Department 90430 UFS - Office of Continuous Improvement</p> <p>Cost Center 5450006 Systems &amp; Process Improvement</p> <p>Account 503100 Phone/Fax Long Distance</p> <p>Supplemental 0000000000 Supplemental Default</p> <p>Interfund 0000 Default Fund</p> <p>Project 0000000000 Default Project</p> <p>Future1 0000000000 Default Future 1 Finance</p> <p>Search Reset   OK Cancel</p> <p>Fund 1001</p> <p>Department 0000 Default</p> <p>Center 1001 Appropriation</p> <p>Account 1009 Cost Share</p> <p>Department 1012 Financial</p> <p>Interfund 1040 BSPR Finance</p> <p>Project 1049 BSPR Finance</p> <p>Future1 1450 Test Share</p> <p>Future2 1499 Millennium</p> <p>Future3 1650 Student</p> <p>Future4 1659 Student</p> <p>Search...</p> <p><i>Note: You may click the arrow next to each segment to pull up a search by segment.</i></p> <p>Select the appropriate funding source and Click <b>OK</b>.</p> <p>Charge Account x</p> <p>► Show Segments</p> <table border="1"> <thead> <tr> <th>Fund</th> <th>Department</th> <th>Cost Center</th> <th>Account</th> <th>Supplemental</th> <th>Interfund</th> <th>Project</th> <th>Future1</th> </tr> </thead> <tbody> <tr> <td>3010</td> <td>90430</td> <td>5450006</td> <td>503100</td> <td>0000000000</td> <td>0000</td> <td>0000000000</td> <td>00000000</td> </tr> </tbody> </table> <p>Search Reset   OK Cancel</p> <p><i>ProTip! Download the <b>Expanded Expense Account Code List</b> from the Administrative Accounting website to improve accuracy and save time when entering expense codes in OFC.</i></p>	Fund	Department	Cost Center	Account	Supplemental	Interfund	Project	Future1	3010	90430	5450006	503100	0000000000	0000	0000000000	00000000
Fund	Department	Cost Center	Account	Supplemental	Interfund	Project	Future1										
3010	90430	5450006	503100	0000000000	0000	0000000000	00000000										

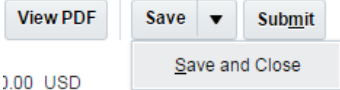


Step	Action														
11.	<p><b>Important: Project Funded Requisitions only, skip to step 12 for non-project funded requisitions.</b></p> <p>If the Requisition will be billed to a Project funding source, use POET to code the transaction in the left side of the Billing distribution lines.</p> <p><b>Project Number:</b> Enter the 10 digit Project segment.  <b>Task Number:</b> Enter 100001 for all services and non-asset goods and 100002 for tagable asset goods.  <b>Expenditure Type:</b> Enter the 6 digit account segment.  <b>Expenditure Organization:</b> Enter the 5 digit department segment.</p> <p>▲ Billing</p> <p>View ▼ Format ▼ X ↶ Freeze Detach ↵ Wrap</p> <p style="text-align: center;">Project Costing Details</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Project Number</th> <th style="width: 15%;">Task Number</th> <th style="width: 15%;">Expenditure Item Date</th> <th style="width: 15%;">Expenditure Type</th> <th style="width: 15%;">Expenditure Organization</th> <th style="width: 15%;">* Contract Number</th> </tr> </thead> <tbody> <tr> <td>10000130</td> <td></td> <td>9/25/18</td> <td></td> <td></td> <td>1000097</td> </tr> </tbody> </table> <p>When you add this to your Cart the <b>Charge Account</b> will be updated automatically.</p>	Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	* Contract Number	10000130		9/25/18			1000097		
Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	* Contract Number										
10000130		9/25/18			1000097										
12.	<p>Enter <b>Budget Date</b>.</p> <p>1 ↵ Wrap</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">Charge Account</th> <th style="width: 15%;">* Budget Date</th> <th style="width: 15%;">* Percentage</th> <th style="width: 30%;">Amount (USD)</th> </tr> </thead> <tbody> <tr> <td>3010.90430.5450006.503100.000000</td> <td>9/17/2018</td> <td>100</td> <td>1,000.00</td> </tr> </tbody> </table> <p><i>Note:</i> For project expenses, this should match the Expenditure Item Date.</p>	Charge Account	* Budget Date	* Percentage	Amount (USD)	3010.90430.5450006.503100.000000	9/17/2018	100	1,000.00						
Charge Account	* Budget Date	* Percentage	Amount (USD)												
3010.90430.5450006.503100.000000	9/17/2018	100	1,000.00												
13.	<p>Update the billing distribution, if applicable, by changing the <b>Amount</b> and Selecting the <b>Split</b> icon ↶</p> <p>▲ Billing</p> <p>View ▼ Format ▼ X ↶ Freeze Detach ↵ Wrap</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Contract Number</th> <th style="width: 10%;">Funding Source</th> <th style="width: 15%;">Charge Account Nickname</th> <th style="width: 15%;">Charge Account</th> <th style="width: 15%;">* Budget Date</th> <th style="width: 15%;">* Percentage</th> <th style="width: 15%;">Amount (USD)</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>3010.90430.5450006.503100.000000</td> <td>9/17/2018</td> <td>100</td> <td>1,000.00</td> </tr> </tbody> </table> <p><i>Note:</i> Each line will be calculated based on the entry.</p>	Contract Number	Funding Source	Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Amount (USD)				3010.90430.5450006.503100.000000	9/17/2018	100	1,000.00
Contract Number	Funding Source	Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Amount (USD)									
			3010.90430.5450006.503100.000000	9/17/2018	100	1,000.00									



Step	Action
14.	Include a <b>Note to Buyer</b> to communicate information to Purchasing, such as Special Handling Instructions.  <b>Note:</b> This field is limited to 240 characters.
15.	Select  <b>Note:</b> You may add additional lines by completing steps 5 through 14 for <b>Requisition Lines</b> on the left side of the screen, not to exceed 60 lines.
16.	In the upper right hand corner click  and <b>Review</b> . 
17.	Enter <b>Justification</b> and provide the business purpose for the purchase. 
18.	Click the <b>+</b> icon under <b>Attachments</b> to upload additional attachments to the <b>Requisition Header</b> . 



Step	Action						
19.	<p>Click <b>Save and Close</b> to edit and submit at a later time.</p> <p>Click <b>Submit</b> to submit the requisition into the standard approval workflow.</p> <p>Click <b>View PDF</b> to view the requisition.</p>  <p><b>ProTip!</b> To review the Approval Workflow status, click Pending Approval link under the Status column on the appropriate Requisitions to view.</p> <p>Recent Requisitions</p> <table border="1" data-bbox="358 768 656 884"><tbody><tr><td>REQ137836 test</td><td>Incomplete</td></tr><tr><td>REQ137799 5/14/18-7/2/18 - score 25 vide</td><td>Approved</td></tr><tr><td>REQ137797 Mentor</td><td>Pending approval</td></tr></tbody></table>	REQ137836 test	Incomplete	REQ137799 5/14/18-7/2/18 - score 25 vide	Approved	REQ137797 Mentor	Pending approval
REQ137836 test	Incomplete						
REQ137799 5/14/18-7/2/18 - score 25 vide	Approved						
REQ137797 Mentor	Pending approval						
20.	Once the item is received and the invoice is ready to be paid, follow the <a href="#">Ready to Pay</a> procedure outlined on the Accounts Payable website.						
21.	<b>End of Procedure.</b>						