

How to Create a Requisition

Procure to Pay

<https://procuretopay.sdsu.edu>

[ServiceNow request form](#)

Step 1

Login to Oracle at <https://aisfinprd.sdsu.edu:4443>

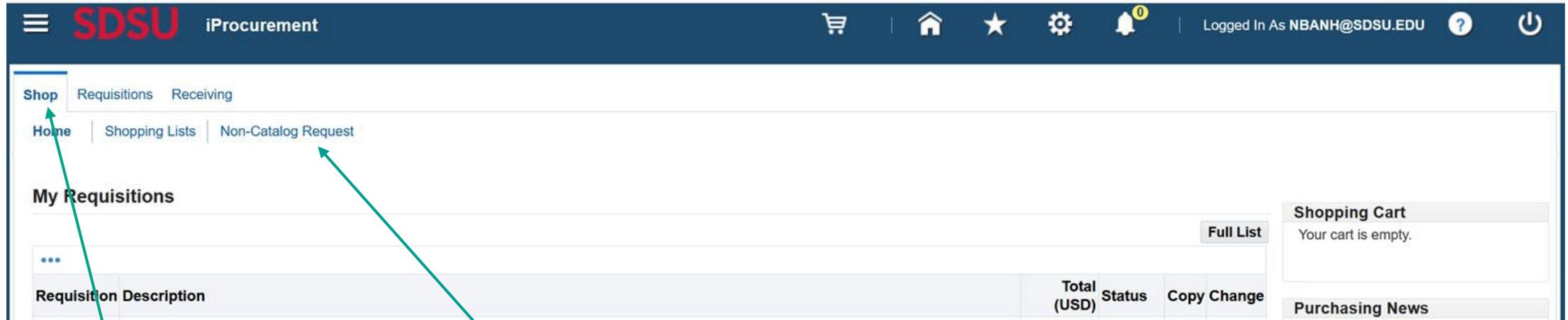
The screenshot shows the Oracle AISC Home page. The browser address bar displays the URL https://aisfinprd.sdsu.edu:4443/OA_HTML/OA.jsp?OAFunc=OAHOMEPAGE&oas=b9holnD8NLOZOKOy8GYuqA... The page header includes the SDSU logo, the instance name 'finprd', and the user 'Logged In As NBANH@SDSU.EDU'. The main content area is titled 'Home' and contains a 'Navigator' section with a 'Personalize' button. The Navigator is divided into two columns. The left column lists various application folders, with 'SDSU PO Requestor' highlighted. The right column lists 'Internet Procurement' options, including 'iProcurement Home', which is also highlighted. A 'Favorites' section on the right lists various procurement-related items. Two green arrows point from external text to the 'SDSU PO Requestor' and 'iProcurement Home' links.

(a) Click on SDSU PO Requestor

(b) Click on iProcurement Home



Step 2



The screenshot shows the SDSU iProcurement website interface. At the top, there is a dark blue header with the SDSU logo, the text 'iProcurement', and several navigation icons including a shopping cart, home, star, gear, and a notification bell with a '0' badge. On the right side of the header, it says 'Logged In As NBANH@SDSU.EDU' with a help icon and a power icon.

Below the header, there are two rows of navigation tabs. The first row contains 'Shop', 'Requisitions', and 'Receiving'. The second row contains 'Home', 'Shopping Lists', and 'Non-Catalog Request'. Two green arrows point from the text below to the 'Shop' tab and the 'Non-Catalog Request' subsection.

The main content area is titled 'My Requisitions'. It features a table with columns for 'Requisition Description', 'Total (USD)', 'Status', and 'Copy Change'. A 'Full List' button is located to the right of the table. On the right side of the page, there are two widgets: 'Shopping Cart' with the message 'Your cart is empty.' and 'Purchasing News'.

Stay in the **Shop** tab & click on the **Non-Catalog Request** subsection



Step 3

Fill in the information for all required fields

Notes:

- Click on the magnifying glass icon to search database
- Regarding supplier information, please search the supplier's name in the database first (click on the magnifying glass icon next to the **Supplier Name** box; if supplier is not found in database, then click "New Supplier" box and enter the information).
- *Again, check the "New Supplier" box ONLY if*

Oracle iProcurement: Shop

https://aisfinprd.sdsu.edu:4443/OA_HTML/OA.jsp?page=/oracle/apps/ix/catalog/shopping/webui/NonCatalogRequestPG&_ti=1388711303&oapc=10&OAMC=10076

120%

SDSU iProcurement

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Non-Catalog Request

Clear All Add to Favorites Add to Cart

Shopping Cart
Your cart is empty.

* Indicates required field

* Item Type

* Item Description

* Category

* Quantity

* Unit of Measure

* Unit Price

* Currency USD

Contract Number

New Supplier

Supplier Name

Site

Contact Name

Phone

Supplier Item

Additional Information

* Line Type



the supplier is truly new to SDSU

Please select the appropriate choice

File Edit View History Bookmarks Tools Help

Oracle iProcurement: Shop

https://aisfinprd.sdsu.edu:4443/OA_HTML/OA.jsp?page=/oracle/apps/ix/catalog/shopping/webui/NonCatalogRequestPG&ti=1388711303&oapc=10&OAMC=10078

SDSU iProcurement

Logged In As NBANH@SDSU.EDU

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Non-Catalog Request

Clear All Add to Favorites Add to Cart

Shopping Cart
Your cart is empty.

* Indicates required field

* Item Type

* Item Description

* Category

* Quantity

* Unit of Measure

* Unit Price

* Currency

Contract Number

New Supplier

Supplier Name

Site

Contact Name

Phone

Supplier Item

Additional Information

* Line Type

Drop-down menu for **Item Type** has 3 options:

- Goods – item price & quantity
- Services – rate & quantity
- Goods or Services – description & total amount



Amount Based

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Non-Catalog Request

Clear All Add to Favorites Add to Cart

Shopping Cart
Your cart is empty.

* Indicates required field

* Item Type Goods or Services.I can provide description and Total Amount

* Item Description

* Category

* Amount

* Currency USD

Contract Number

New Supplier

Supplier Name

Site

Contact Name

Phone

Supplier Item

Additional Information

* Line Type

22/23 HS 650 PERFORMANCE
AUTOMATION SOLUTIONS INC
TO PROVIDE BUILDING
AUTOMATION SYSTEM SERVICES
FOR HOUSING JULY 2022
THROUGH JUNE 2023

SERVICE MAINT MISC

\$5,640

SERVICE AMOUNT

PERFORMANCE
AUTOMATION
SOLUTIONS INC

JOHN DOE

123-456-7890



Quantity Based - Goods

SDSU iProcurement | Logged In As NBANH@SDSU.EDU

Shop | Requisitions | Receiving

Home | Shopping Lists | **Non-Catalog Request**

Non-Catalog Request

* Indicates required field

* Item Type: Goods. I can provide description, item price and quantity

* Item Description:

* Category:

* Quantity:

* Unit of Measure:

* Unit Price:

* Currency: USD

Contract Number:

New Supplier

Supplier Name:

Site:

Contact Name:

Phone:

Supplier Item:

Additional Information

* Line Type:

Clear All | Add to Favorites | Add to Cart

Shopping Cart
Your cart is empty.

22/23 HS-650 HUBBELL WIRING
DEVICE-KELLEMS LOCKING
CONNECTOR Item 3D258 Mfr.
Model HBL7506C

ELECTRICAL SUPPLIES

300

EACH

\$42.23

GOODS/SUPPLIES



Quantity Based - Services

The screenshot shows the 'Non-Catalog Request' form in the SDSU iProcurement system. The form is titled 'Non-Catalog Request' and includes a 'Shopping Cart' section on the right that says 'Your cart is empty.' The form contains several required fields, indicated by an asterisk (*). Annotations with arrows point to specific fields and values:

- 22-23 ABC CONSULTING SERVICES** points to the *** Item Description** field.
- SERVICE CONSULTING** points to the *** Category** dropdown menu.
- 10** points to the *** Quantity** input field.
- HOUR** points to the *** Unit of Measure** dropdown menu.
- \$350** points to the *** Rate per Unit** input field.
- SERVICES QTY** points to the *** Line Type** dropdown menu.

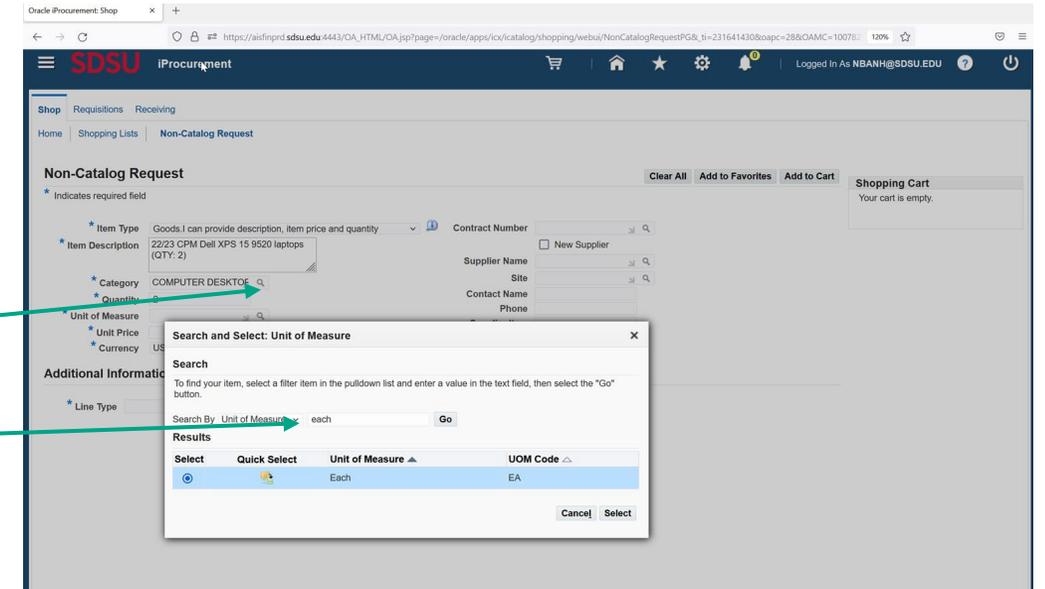
Other fields and options include:

- * Item Type:** Services.I can provide description, rate and quantity
- Contract Number:** Searchable dropdown
- Supplier Name:** Searchable dropdown
- Site:** Searchable dropdown
- Contact Name:** Searchable dropdown
- Phone:** Searchable dropdown
- Supplier Item:** Searchable dropdown
- * Currency:** USD
- Buttons:** Clear All, Add to Favorites, Add to Cart

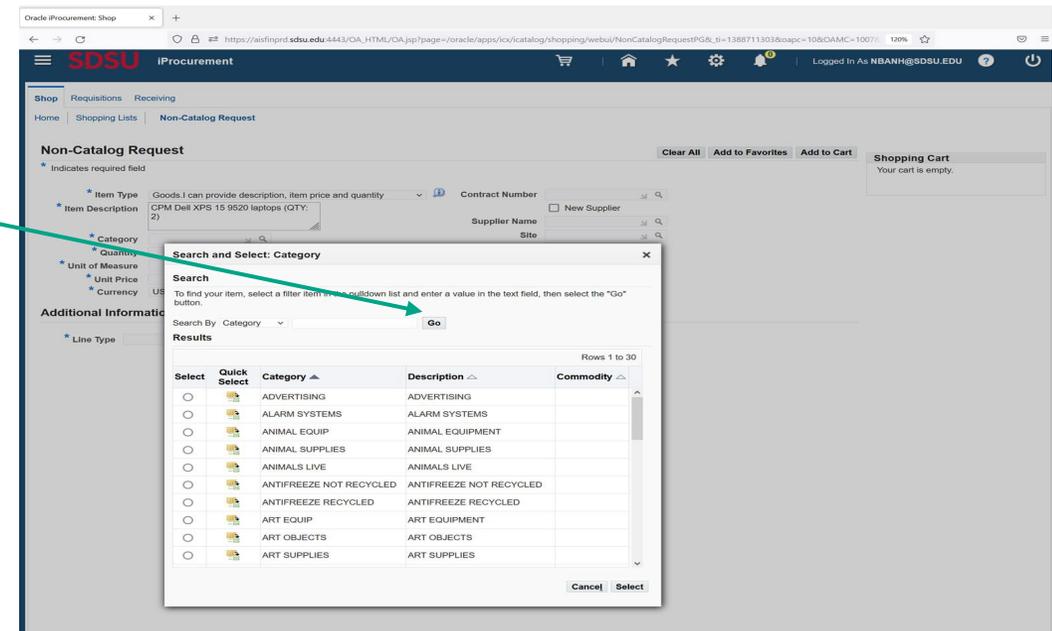


Search function – Magnifying glass icon

When you click on the magnifying glass icon, a window pops up. You may enter a keyword in the search box and then click “Go”



Or, if you want to see a listing of all the options, then leave the search box blank and just click “Go”



Step 4

SDSU iProcurement

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Non-Catalog Request

* Indicates required field

* Item Type Goods. I can provide description, item price and quantity

* Item Description 22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)

* Category COMPUTER DESKTOE

* Quantity 2

* Unit of Measure Each

* Unit Price 1756.28

* Currency USD

Contract Number

New Supplier

Supplier Name DELL MARKETING LP

Site 1 WP DIRECT

Contact Name

Phone

Supplier Item

Clear All Add to Favorites **Add to Cart**

Shopping Cart

Your cart contains 1 line.

Recently Added Lines

22/23 CPM Dell ...	2	Each
--------------------	---	------

[View Cart and Checkout](#)

Additional Information

* Line Type IT Equipment
IT Hardware, Includes Maintenance and Support

Once all the information is entered, click **“Add to Cart”**



Step 5

(a) Repeat step 3 & 4 for each line entry if requisition is itemized as seen on your quote

The screenshot shows the 'Non-Catalog Request' form in the SDSU iProcurement system. The form is titled 'Non-Catalog Request' and includes several sections: 'Item Type', 'Item Description', 'Category', 'Quantity', 'Unit of Measure', 'Unit Price', 'Currency', 'Contract Number', 'Supplier Name', 'Site', 'Contact Name', 'Phone', 'Supplier Item', and 'Additional Information'. A 'View Cart and Checkout' button is located in the top right corner of the form area. A green arrow points from the text on the left to the 'View Cart and Checkout' button.

(b) When all lines are entered, click **“View Cart and Checkout”** button. A window will pop-up (see next slide)

**Note: You do not need to add a line for taxes.*

***Note: You need to add EWRFs (electronic waste recycling fees)*

****Note: You need to add a freight line if it is > \$500.*



Step 6

The screenshot shows the SDSU IProcurement Non-Catalog Request form. The form includes fields for Item Type, Item Description, Category, Amount, Currency, Contract Number, Supplier Name, Site, Contact Name, and Supplier Item. A Shopping Cart modal is open, displaying a table with the following data:

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)	Each	2	1756.28 USD	3,512.56	
2	22/23 EWRF fee	Dollars	10	1 USD	10.00	
Total					3,522.56	

Below the table are buttons for Continue Shopping, Edit, Save, and Submit. A green arrow points to the Edit button.

Click **Edit**



Step 7

Review & Edit Account String

(a) Click on the checkbox

(b) Click on the **Update** button

The screenshot displays the 'Edit and Submit Requisition 30154216' page in the SDSU iProcurement system. The page includes a navigation bar with 'Shop', 'Requisitions', and 'Receiving' tabs. The main content area shows the requisition details, including a total amount of 3,522.56 USD and a description of '22/23 CPM Deal XPS 15 9520 laptops (QTY: 2)'. A table of requisition lines is shown below, with the first line selected. The 'Update' button is highlighted in the table's header. Below the table, there is an 'Approvals' section with a button labeled 'SDSU REQ CC FUND APPROVERS'. The 'Notes And Attachments' section is also visible.

Details	Item Number	Description	Quantity	Unit	Price	Amount (USD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
<input checked="" type="checkbox"/>		22/23 CPM Deal XPS 15 9520 laptops (QTY: 2)	2	Each	1756.28 USD	3,512.56	22-Dec-2022 00:00:00	AD116	+		
<input type="checkbox"/>		22/23 EWRF fee	10	Dollars	1 USD	10.00	22-Dec-2022 00:00:00	AD116	+		
Total						3,522.56					



Opportunity to Revise & Add Information

The screenshot displays the 'Edit and Submit Requisition 30154216' interface. A modal window titled 'Requisition Information : Update Selected Line' is open, showing fields for Item, Supplier, Delivery, Notes, and Billing. The Item section includes Description (22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)), Category (COMPUTER DESKTOP), Quantity (2), Unit of Measure (Each), Unit Price (1756.28), Amount (3,512.56), and Currency (USD). The Supplier section includes fields for Supplier (DELL MARKETING LP), Site (1 WP DIRECT), Contact Name, Phone, Fax, Email, and Supplier Item. The Delivery section includes fields for Urgent (checked), Need-By Date (22-Dec-2022 00:00:00), Requester (Banh, Nha), and Deliver-To Location (AD116). The Notes section includes fields for Note To Buyer, Note To Supplier, and Note To Receiver. The Billing section includes a table with columns: Line, Accounting Flexfield, GL Date, Expenditure Item Date, Percent, Quantity, Amount (USD), and Delete. The table shows a single line item with a total amount of 3,512.56 USD. The interface also includes buttons for 'Cancel' and 'Apply'.

Line	Accounting Flexfield	GL Date	Expenditure Item Date	Percent	Quantity	Amount (USD)	Delete
1	63051.000.66030.0000.1006.3606	20-Dec-2022		100	2	3,512.56	
Total				100	2	3,512.56	

Review all the information you've entered to ensure accuracy and edit as needed. You may also add a "Note To Buyer".

Please ensure that the account string is correct, and if necessary, update it.



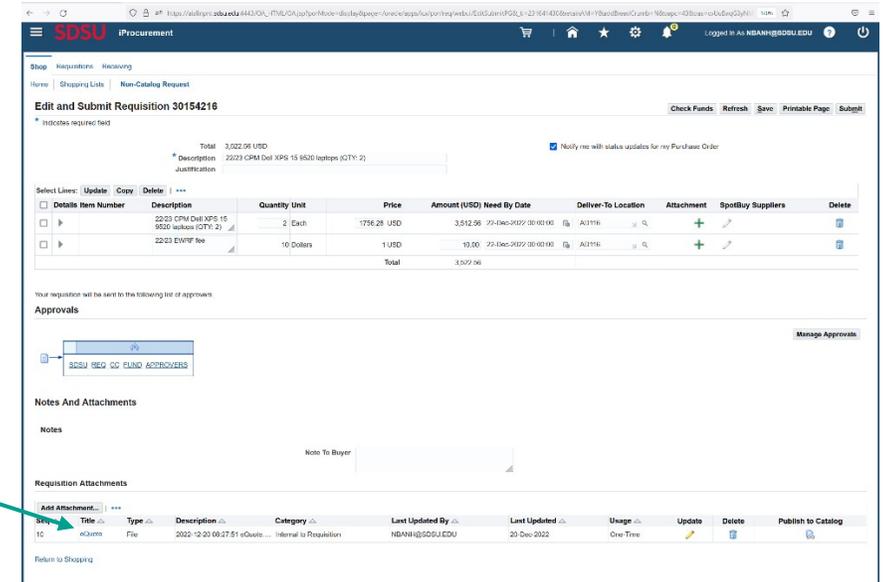
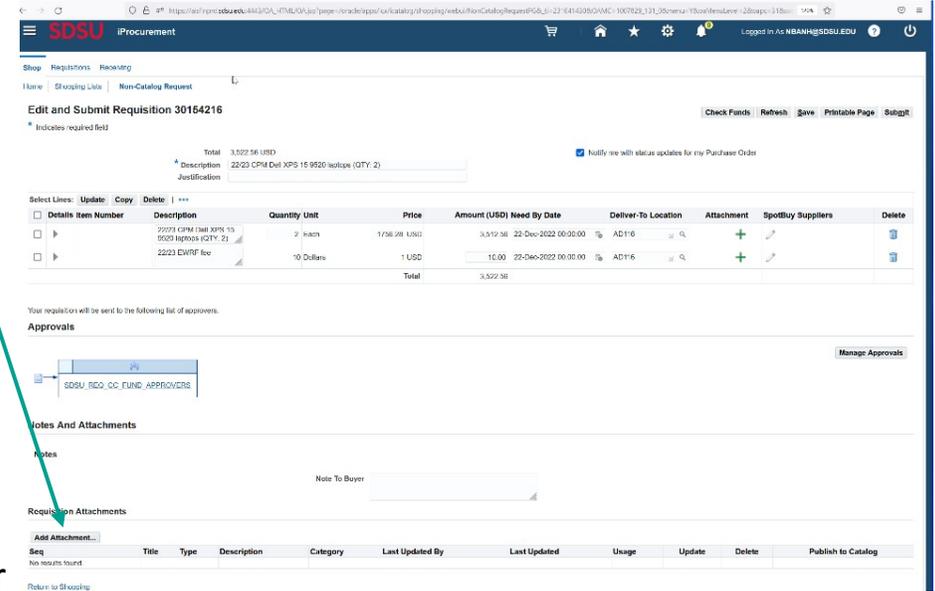
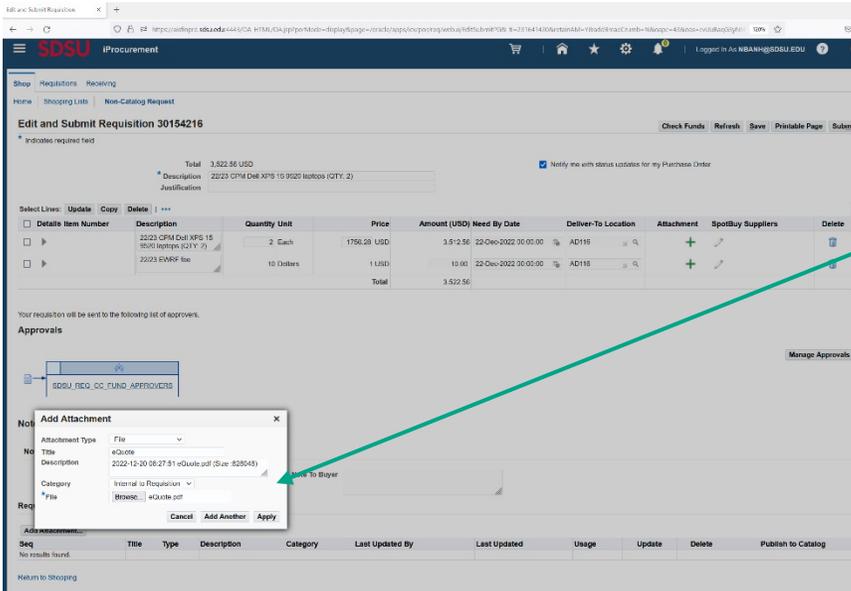
Step 8

Click **Add Attachment** to attach your documents (e.g., Quote, TARP, proposal or contract received from vendor).

Keep attachment type as “File,” give each a name, and click **Browse** to select the document you want to attach.

If you have multiple documents to attach, click **Add Another** after each document until the last attachment. After the last attachment, click **Apply**

Note: Once the document(s) is successfully attached, it would be displayed under the Add Attachment section as seen here



Step 9

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 30154216

Check Funds Refresh Save Printable Page **Submit**

Total 3,522.56 USD

Notify me with status updates for my Purchase Order

Description 22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)

Justification

Select Lines: Update Copy Delete | ...

Details	Item Number	Description	Quantity	Unit	Price	Amount (USD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
<input type="checkbox"/>	▶	22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)	2	Each	1756.28 USD	3,512.56	22-Dec-2022 00:00:00	AD116	+		
<input type="checkbox"/>	▶	22/23 EWRF fee	10	Dollars	1 USD	10.00	22-Dec-2022 00:00:00	AD116	+		
						Total					
						3,522.56					

Your requisition will be sent to the following list of approvers.

Approvals

Manage Approvals

SDSU_REQ_CC_FUND_APPROVERS

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	eQuote	File	2022-12-20 08:27:51 eQuote...	Internal to Requisition	NBANH@SDSU.EDU	20-Dec-2022	One-Time			

Return to Shopping

Click Submit

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 30154216

Check Funds Refresh Save Printable Page **Submit**

Total 3,522.56 USD

Notify me with status updates for my Purchase Order

Description 22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)

Justification

Select Lines: Update Copy Delete | ...

Details	Item Number	Description	Quantity	Unit	Price	Amount (USD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
<input type="checkbox"/>	▶	22/23 CPM Dell XPS 15 9520 laptops (QTY: 2)	2	Each	1756.28 USD	3,512.56	22-Dec-2022 00:00:00	AD116	+		
<input type="checkbox"/>	▶	22/23 EWRF fee	10	Dollars	1 USD	10.00	22-Dec-2022 00:00:00	AD116	+		
						Total					
						3,522.56					

Your requisition will be sent to the following list of approvers.

Approvals

Manage Approvals

SDSU_REQ_CC_FUND_APPROVERS

Confirmation

Requisition 30154216 has been submitted to **Mccovey-Ford, Tamara Lynn** for approval.

To check on this requisition's status, click on the Requisitions tab or look in My Requisitions on the Shop page.

Continue Shopping

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
10	eQuote	File	2022-12-20 08:27:51 eQuote...	Internal to Requisition	NBANH@SDSU.EDU	20-Dec-2022	One-Time			

Return to Shopping

Record the requisition number for your records



Additional Notes

- In general, when a PO is created, matching type is set-up as a 3-way verification for purchase of goods or a 2-way for procurement of services.
- The 3-way verification process involves SDSU Shipping and Receiving. In this scenario, the department would need to inform Shipping & Receiving Services Lead when the department receives all the items ordered. Invoice is paid only *after both* the department requester and Shipping & Receiving Services Lead approve the release of payment.
- All goods should come to campus through SDSU Central Receiving for proper receipting: SDSU Central Receiving, 5555 Canyon Crest Dr., San Diego, CA 92182.
- Invoices related to PO are to be submitted to sdsuapinv@sdsu.edu (this is an unmanned ingestion email; thus, please submit a [ServiceNow request form](#) if you have any questions).



Additional Notes (cont.)

- **Dual Period: May/June (date varies from year to year, please refer to the campus year-end deadlines notification for exact dates)**
 - Requisition submission for both current & next fiscal year
 - GL date must be changed to July 1st for requisitions that are meant for the next fiscal year



Thank You

Questions

[Please submit a P2P Servicenow Request](#)

<https://procuretopay.sdsu.edu/>

<https://sdsuedu.sharepoint.com/sites/procuretopay>

