

How to Create a Requisition

Procure to Pay
P2PCampusCare@sdsu.edu
<https://procuretopay.sdsu.edu/>

Step 1

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

The screenshot shows the Oracle iProcurement Home page. The top navigation bar includes the SDSU logo, the instance name 'finprd', and the user 'Logged In As NBANH@SDSU.EDU'. The main content area is divided into several sections:

- Navigator:** A tree view of applications. The 'SDSU PO Requestor' folder is highlighted.
- Personalize:** A section with a 'Personalize' button and a list of items: 'SDSU PO Requestor', 'Notifications', 'Requisition Summary', and 'Purchase Order Inquiry'.
- Internet Procurement:** A section with a 'Personalize' button and a list of items: 'iProcurement Home' (highlighted), 'Reports', 'Run', and 'Set'.
- Favorites:** A section with a 'Manage Favorites' button and a list of items: 'Requisitions (Buyer Work Center)', 'Orders (Buyer Work Center)', 'Agreements (Buyer Work Center)', 'Suppliers (Buyer Work Center)', 'Workload Assignments (Buyer Work Center)', and 'iProcurement Requisitions (iProcurement: Requisitions)'.

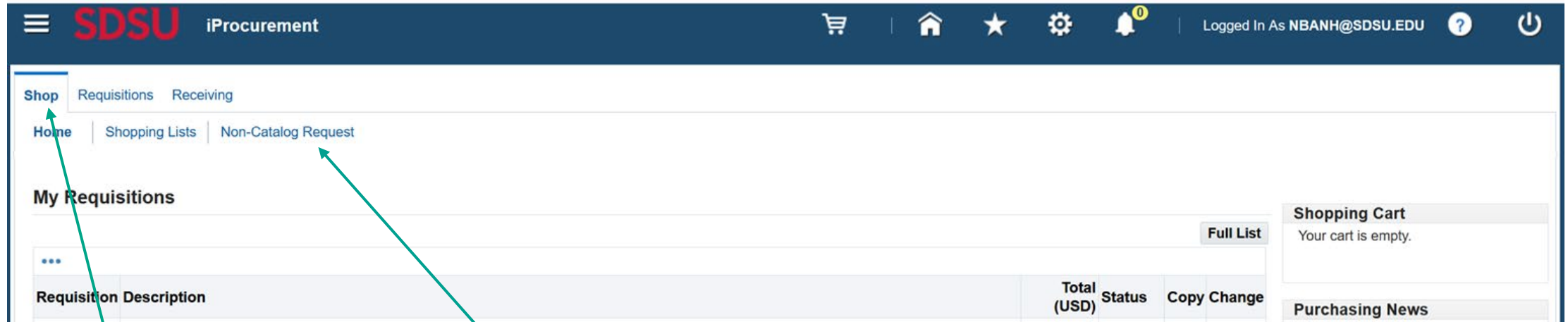
At the bottom left, there are links for 'Oracle WCI - Image Search' and 'Oracle WCI - Request Info'.

(a) Click on **SDSU PO Requestor**

(b) Click on **iProcurement Home**



Step 2



The screenshot shows the SDSU iProcurement website interface. The top navigation bar includes the SDSU logo, the text 'iProcurement', and several utility icons (shopping cart, home, star, settings, notifications). The user is logged in as 'NBANH@SDSU.EDU'. Below the navigation bar, there are two main tabs: 'Shop' and 'Requisitions'. Under the 'Shop' tab, there are three sub-sections: 'Home', 'Shopping Lists', and 'Non-Catalog Request'. The 'Non-Catalog Request' sub-section is highlighted with a green arrow. Below the sub-sections, there is a 'My Requisitions' section with a 'Full List' button. A table is partially visible with columns for 'Requisition Description', 'Total (USD)', 'Status', and 'Copy Change'. On the right side, there is a 'Shopping Cart' section with the text 'Your cart is empty.' and a 'Purchasing News' section.

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 the supplier is truly new to SDSU*

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

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



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:

Buttons: 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 green arrows point to specific fields and values:

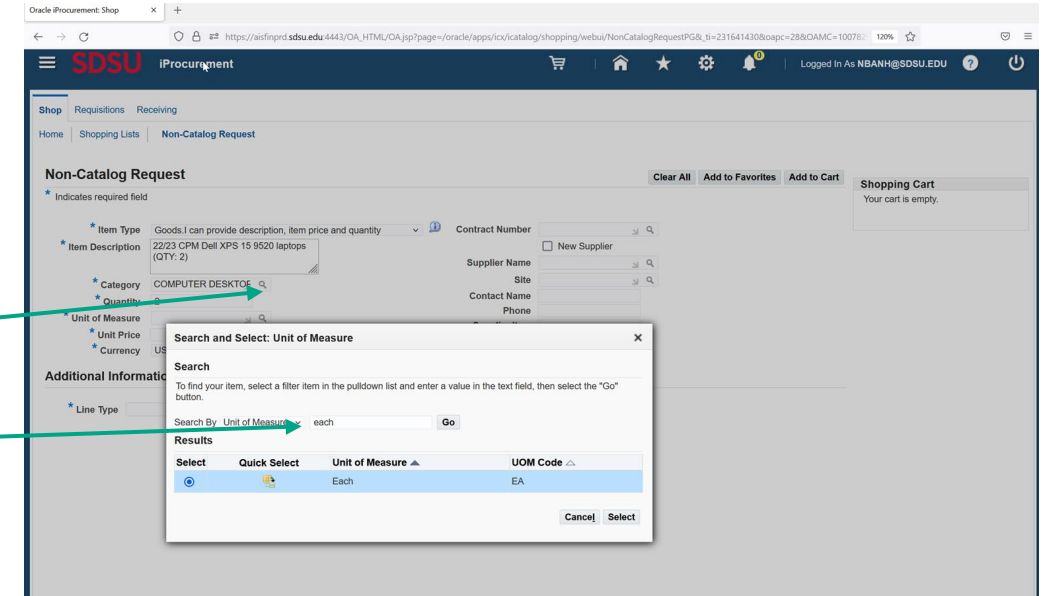
- Item Type:** 'Services.I can provide description, rate and quantity' (Annotated with '22-23 ABC CONSULTING SERVICES')
- Item Description:** (Annotated with 'SERVICE CONSULTING')
- Quantity:** '10' (Annotated with '10')
- Unit of Measure:** 'HOUR' (Annotated with 'HOUR')
- Rate per Unit:** '\$350' (Annotated with '\$350')
- Currency:** 'USD' (Annotated with 'USD')
- Supplier Name:** (Annotated with 'Supplier Name')
- Contact Name:** (Annotated with 'Contact Name')
- Phone:** (Annotated with 'Phone')
- Line Type:** (Annotated with 'SERVICES QTY')

Additional form elements include 'Contract Number', 'New Supplier' checkbox, 'Supplier Site', and 'Supplier Item' fields. The top navigation bar shows 'Shop', 'Requisitions', and 'Receiving' tabs, and the user is logged in as 'NBANH@SDSU.EDU'.

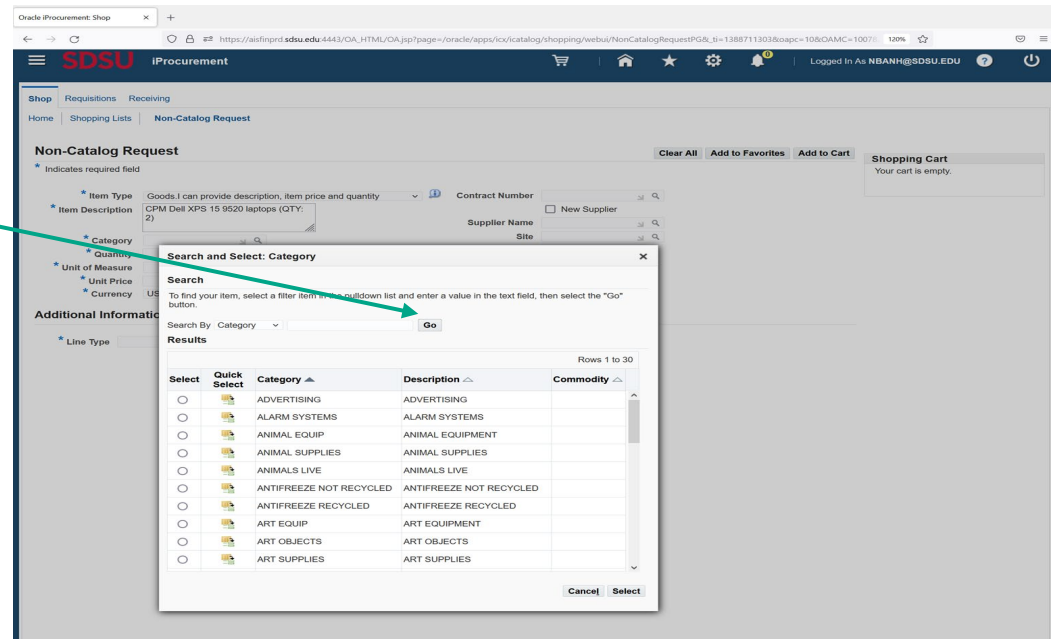


Search function – Magnifying glass icon

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 DESKTOP

* 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', and 'Currency'. There are also fields for 'Contract Number', 'Supplier Name', 'Site', 'Contact Name', 'Phone', and 'Supplier Item'. 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

SDSU iProcurement

Shop Requisitions Receiving

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 30154216

Check Funds Refresh Save Printable Page Submit

* Indicates required field

Total 3,522.56 USD

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

Justification

Notify me with status updates for my Purchase Order

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 Deal XPS 15 9520 laptops (QTY: 2)	2	Each	1,756.28 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

Add Attachment...

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.										

Return to Shopping

Opportunity to Revise & Add Information

The screenshot displays the SDSU iProcurement interface. A modal window titled "Requisition Information : Update Selected Line" is open, showing details for a requisition line. The modal is divided into sections: Item, Supplier, Delivery, Notes, and Billing. The Item section includes fields for Description, Category, Quantity, Unit of Measure, Unit Price, Amount, and Currency. The Supplier section includes fields for Supplier, Site, Contact Name, Phone, Fax, Email, and Supplier Item. The Delivery section includes fields for Need-By Date, Requester, and Deliver-To Location. The Notes section includes fields for Note To Buyer, Note To Supplier, and Note To Receiver. The Billing section includes a table for Line Accounting Flexfield, GL Date, Expenditure Item Date, Percent, Quantity, Amount (USD), and Delete. A TIP message states: "Total allocation must equal 100% of the selected line values." and a checkbox option is available: "Apply this Cost Allocation information to all applicable requisition lines".

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	
	ORG.ACTY.NACCT.ENDVRF.FUND.FUNCS						
			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.



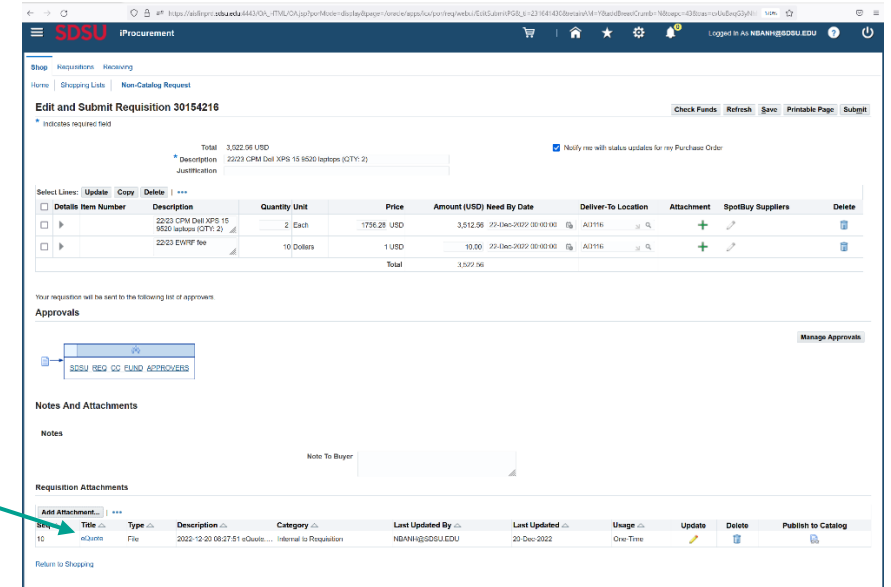
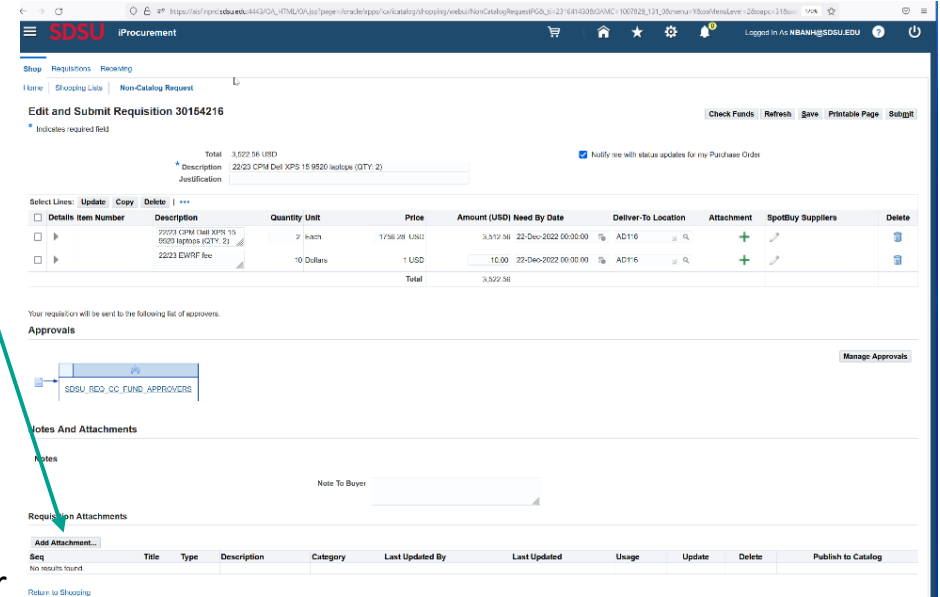
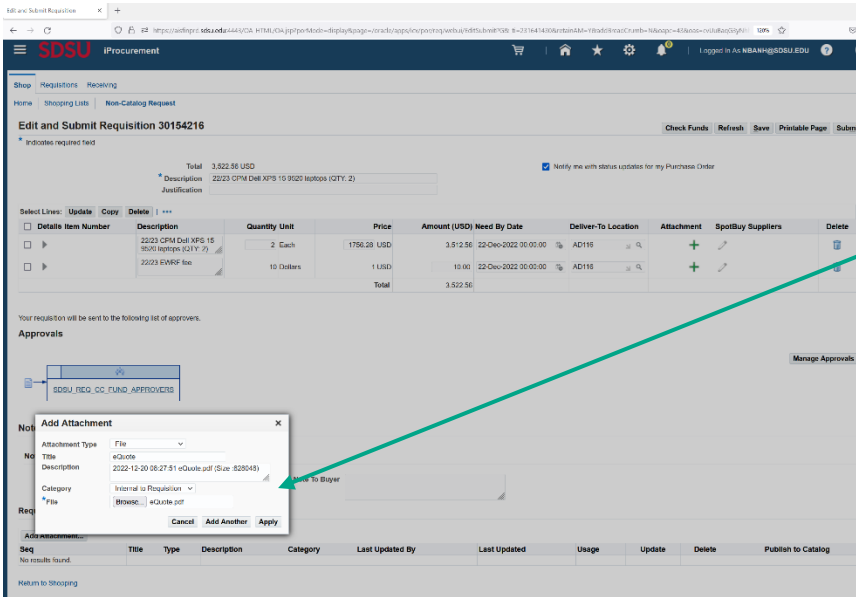
Step 8

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

SDSU iProcurement

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 30154216

Check Funds Refresh Save Printable Page **Submit**

Total 3,522.56 USD

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

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					

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

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**

SDSU iProcurement

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 30154216

Check Funds Refresh Save Printable Page **Submit**

Total 3,522.56 USD

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

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	+		
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						Total					

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

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

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

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 and 2-way for procurement of services.
- The 3-way verification process involves Logistical Services, specifically Shipping and Receiving. In this case, the department would need to inform Shipping & Receiving Services Lead (Mike Johnson, mjohnson@sdsu.edu) when the department receives all the items ordered. Invoice is paid only *after both* the department requisitioner 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 through the ingestion email at sdsuapinv@sdsu.edu



Additional Notes (cont.)

- **Dual Period: Mid-May to mid-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

p2pCampusCare@sdsu.edu

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

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

