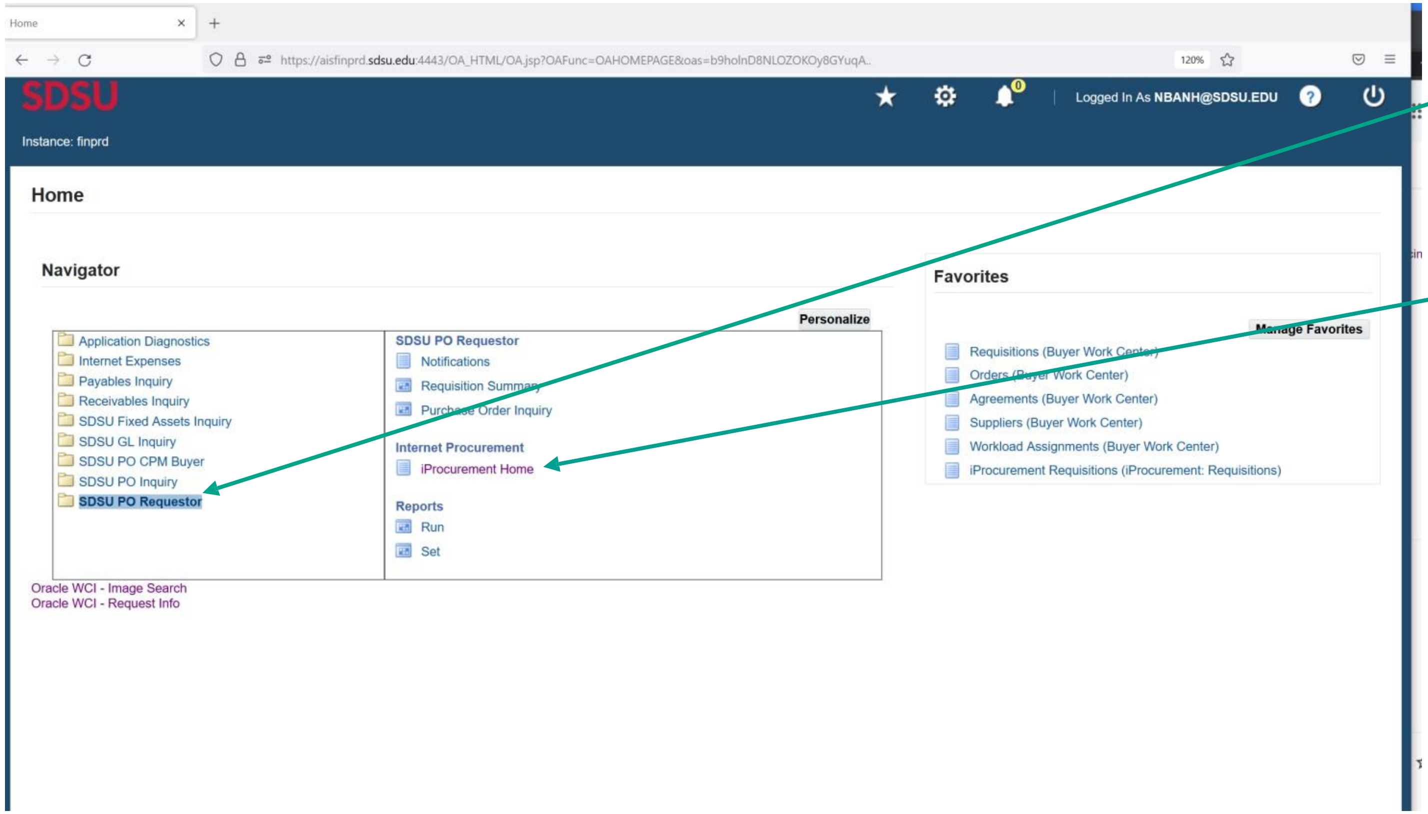
How to Create a Requisition

Procure to Pay
p2pcampuscare@sdsu.edu

Step 1

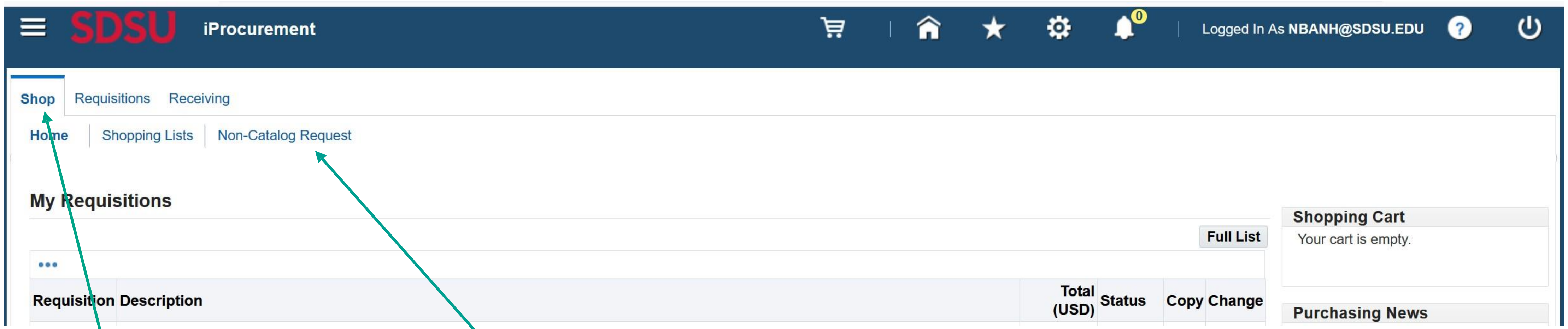
Login to Oracle at https://aisfinprd.sdsu.edu:4443



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

(b) Click on **iProcurement Home**

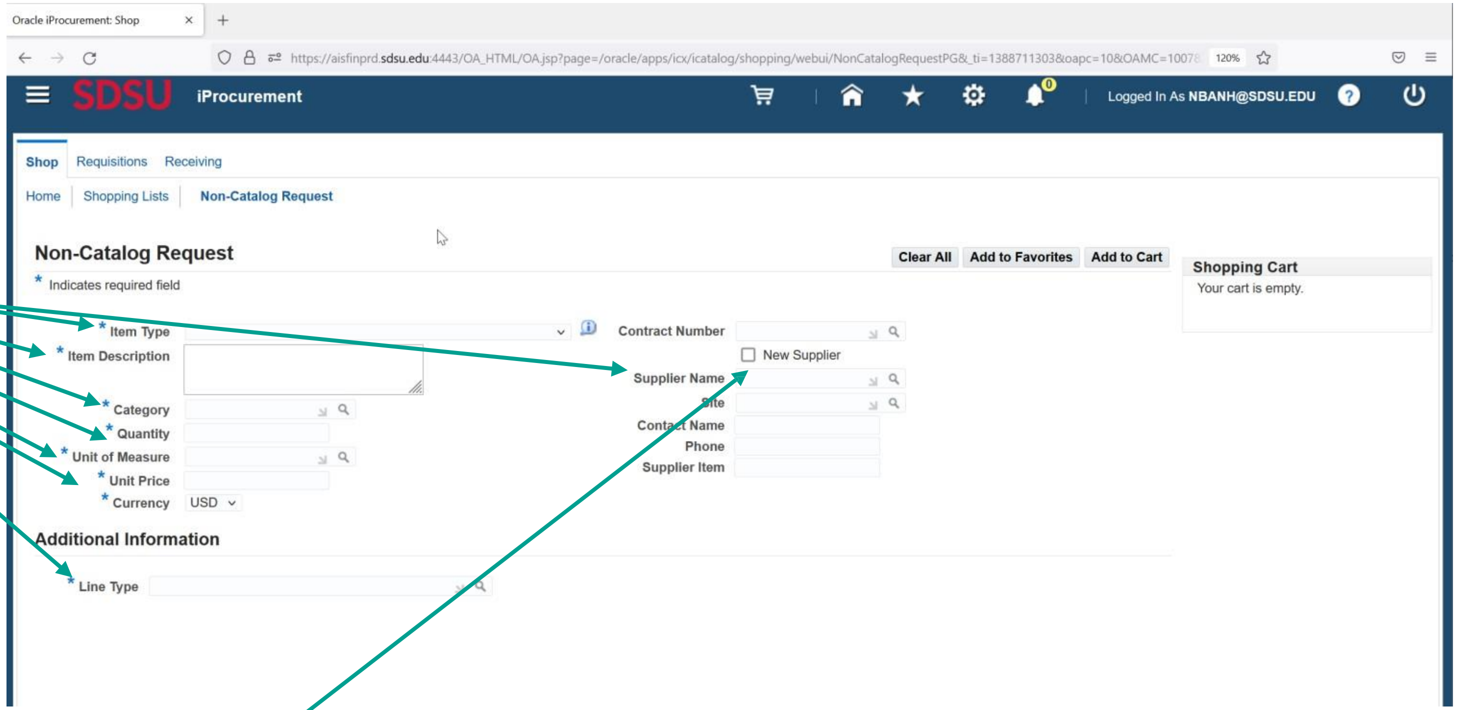
Step 2



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

Step 3

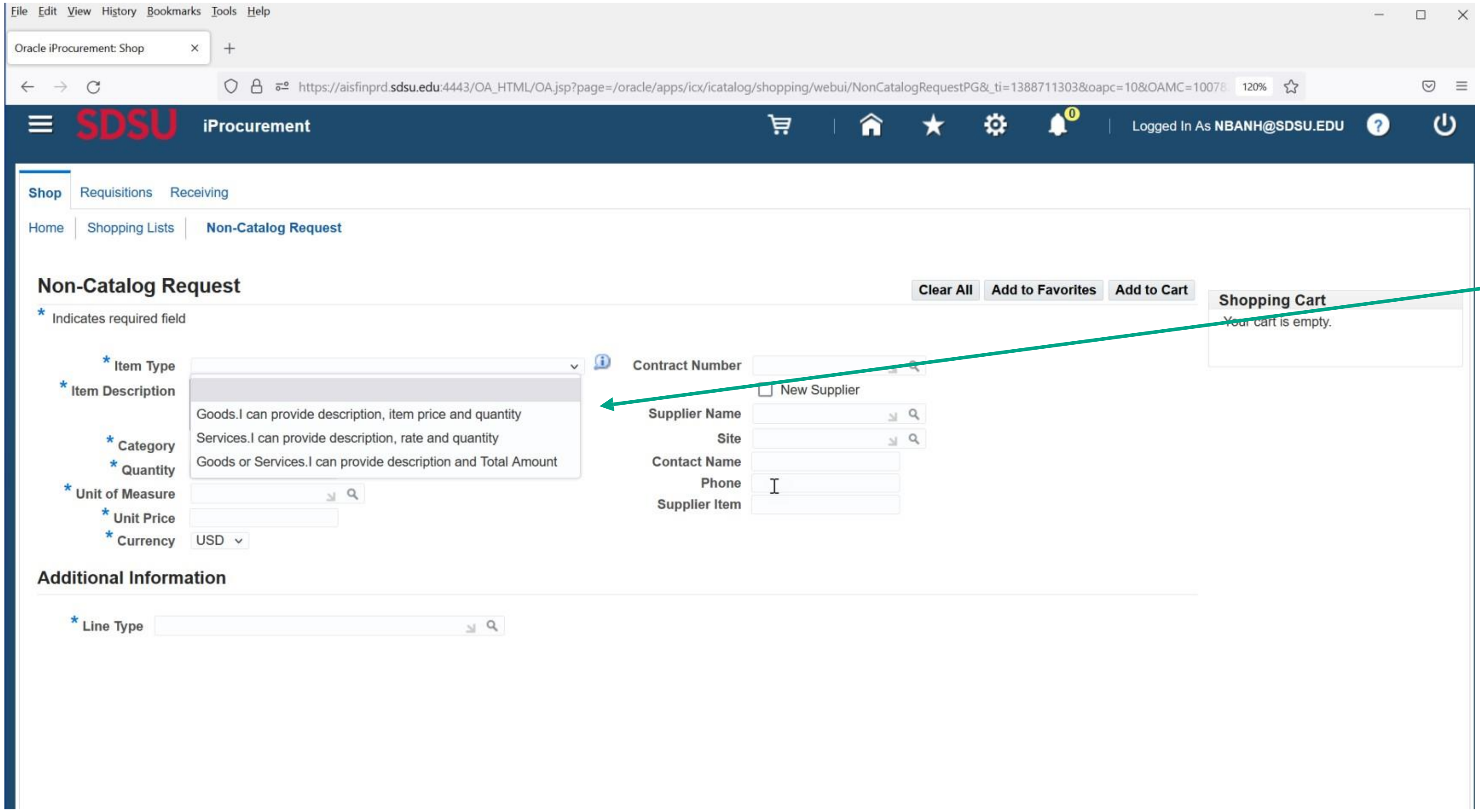
Fill in the information for all required fields



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*

Please select the appropriate choice



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

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

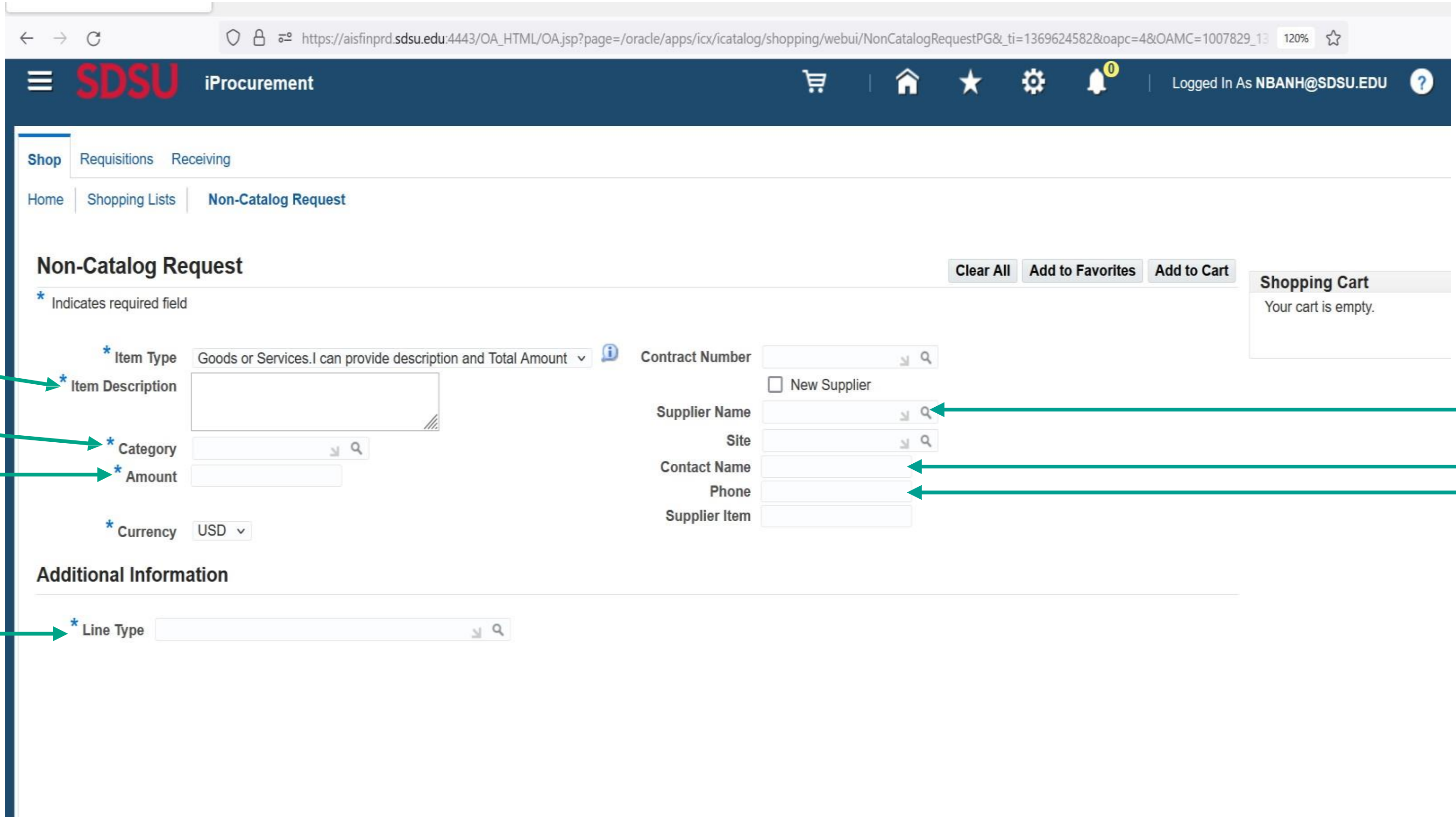
Amount Based

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

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

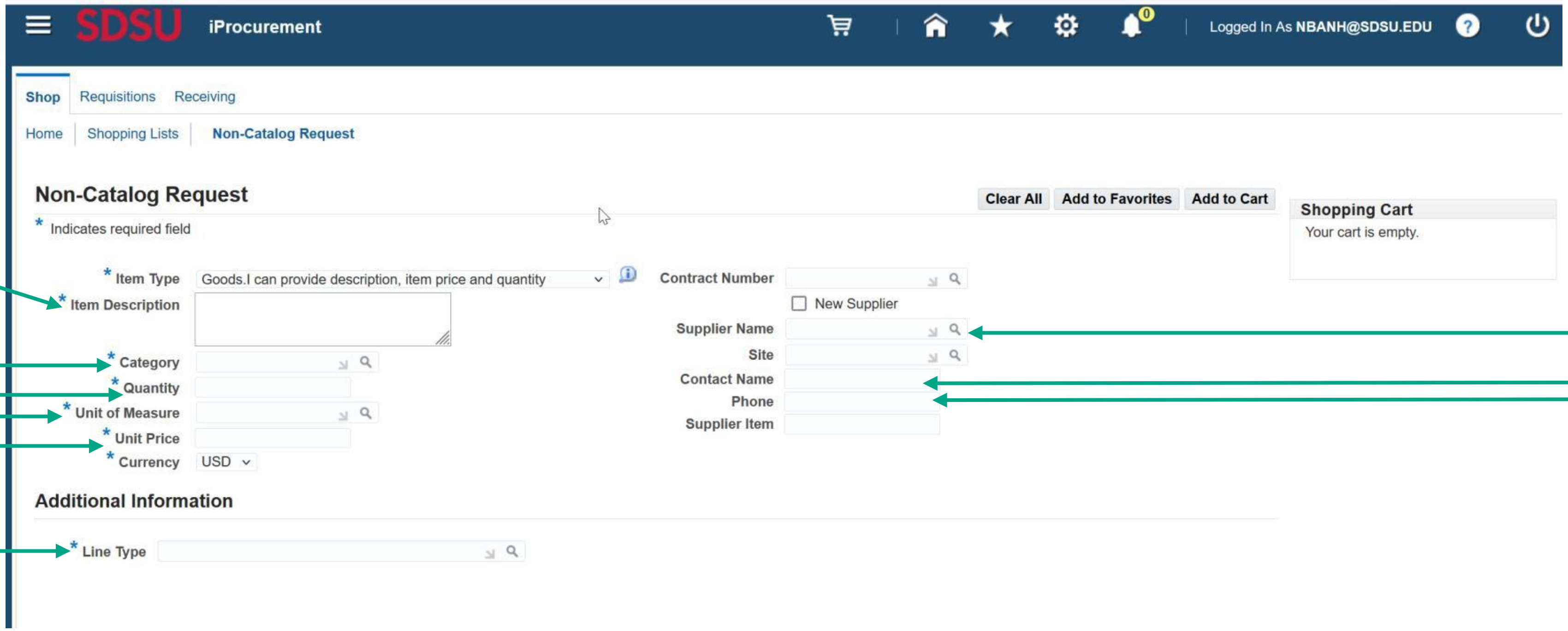
ELECTRICAL SUPPLIES

300

EACH

$42.23

GOODS/SUPPLIES



Quantity Based - Services

22-23 ABC CONSULTING SERVICES

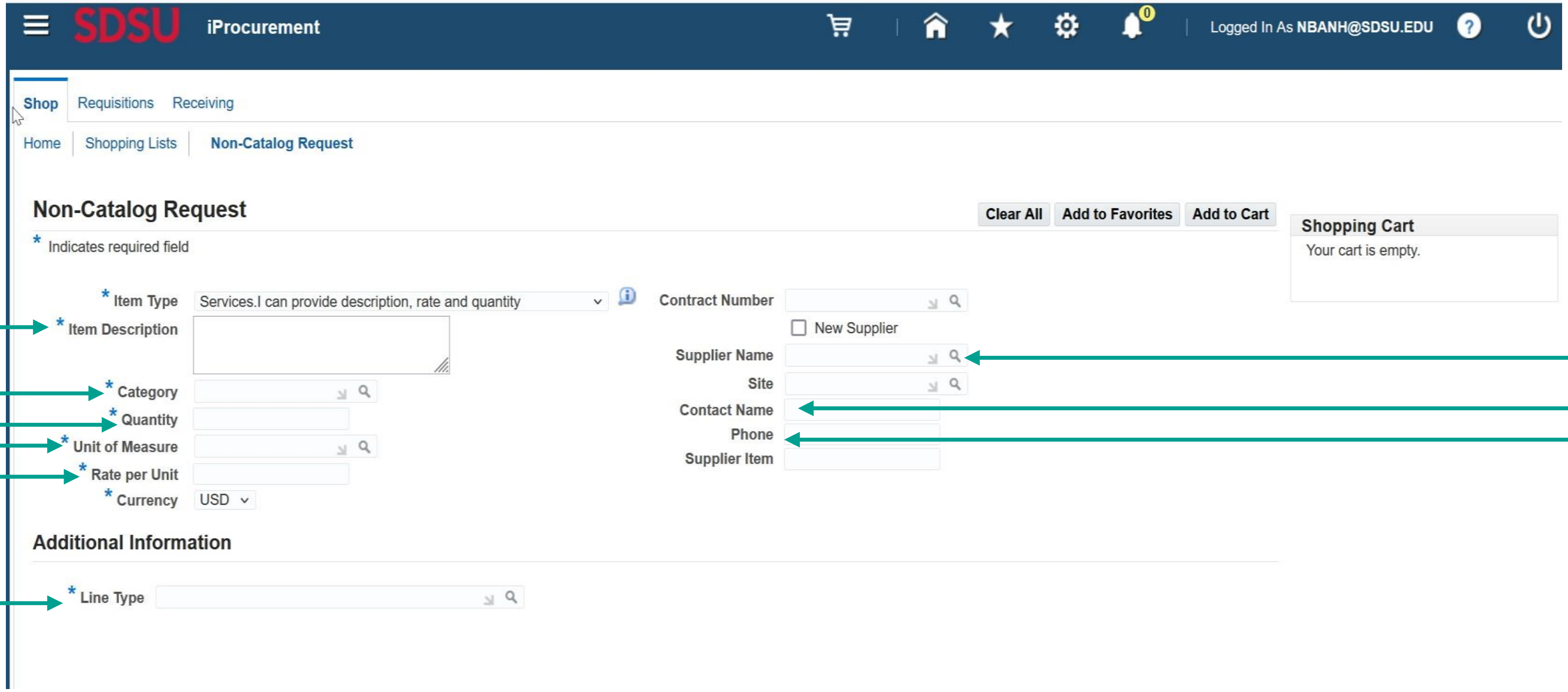
SERVICE CONSULTING

10

HOUR

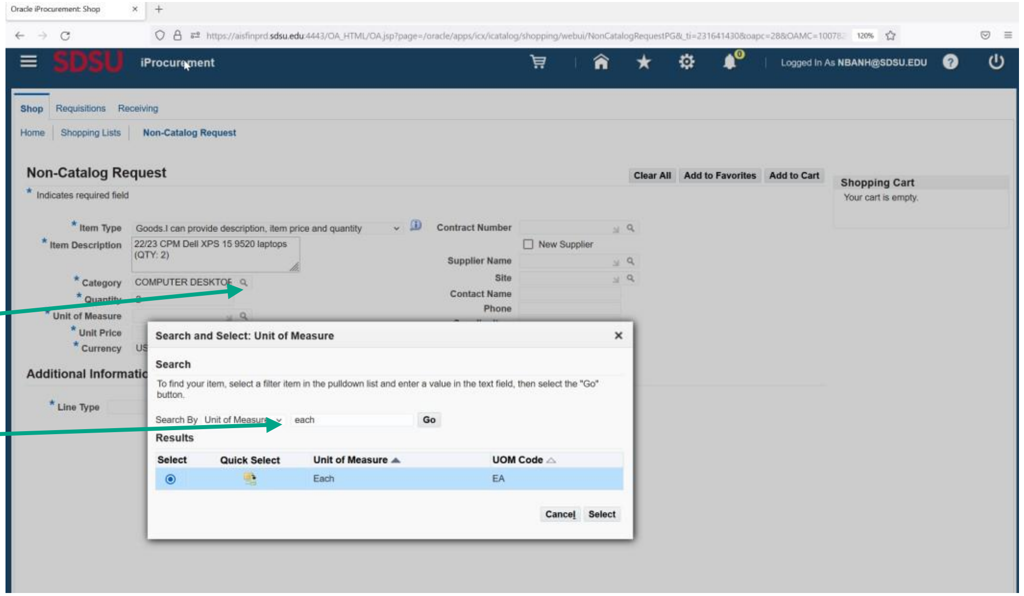
$350

SERVICES QTY

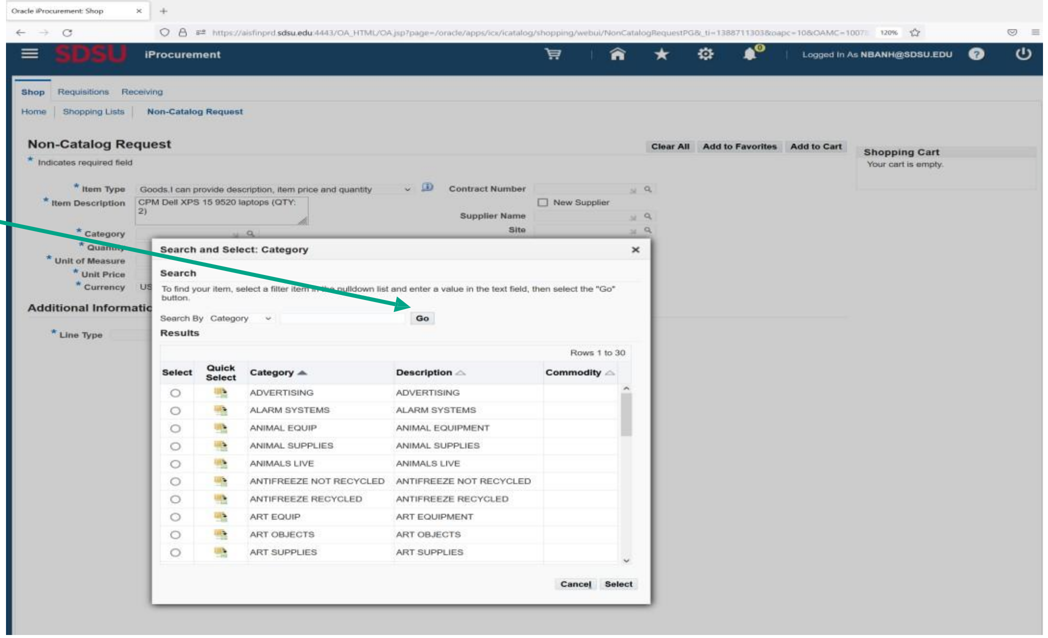


Search function –
Magnifying glass icon

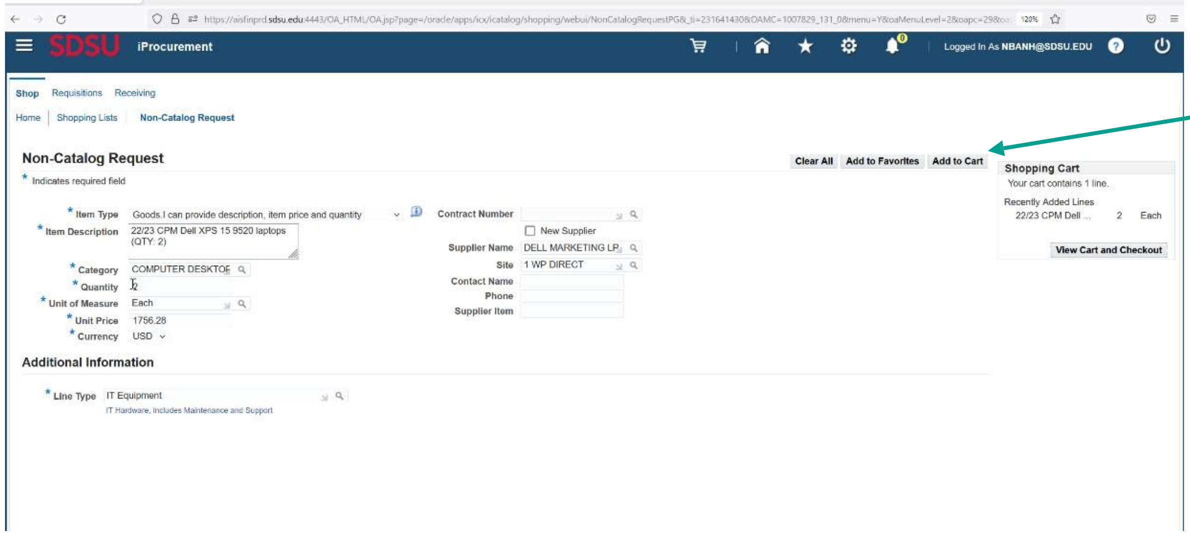
When you click on the magnifying glass icon, a window pops up. You may enter a keyword in the search box and then click “**Go**”



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



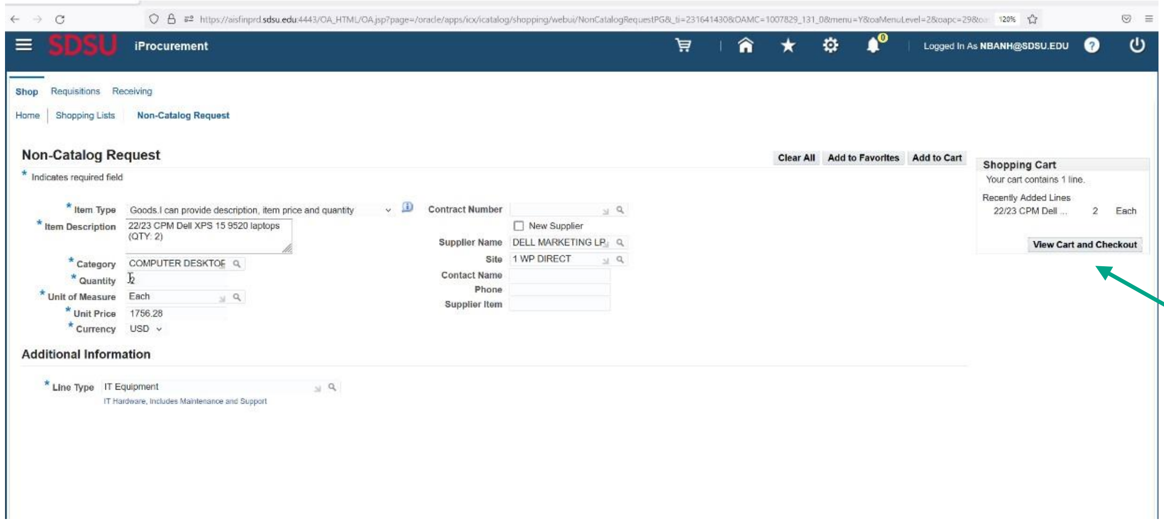
Step 4



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

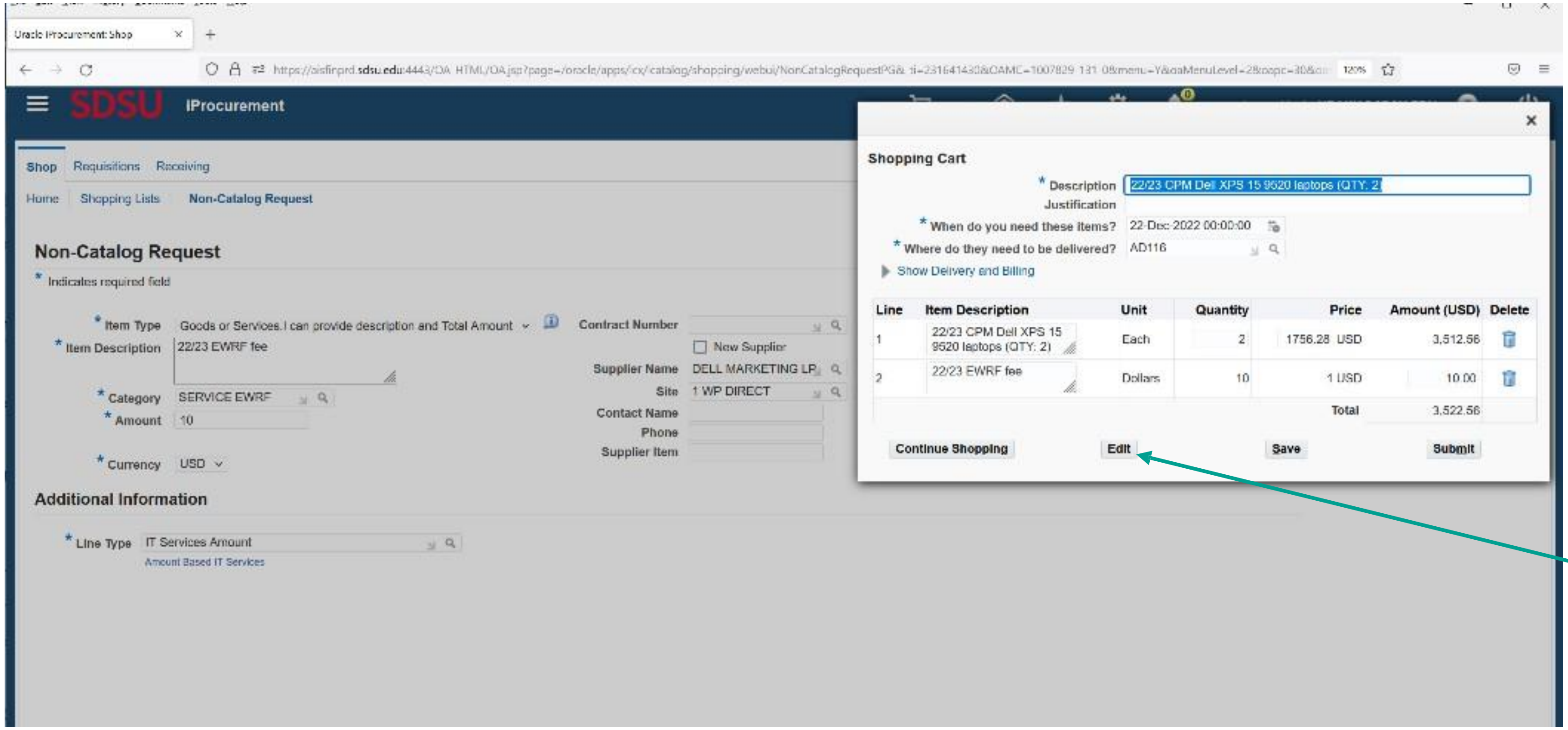
Step 5

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



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

Step 6



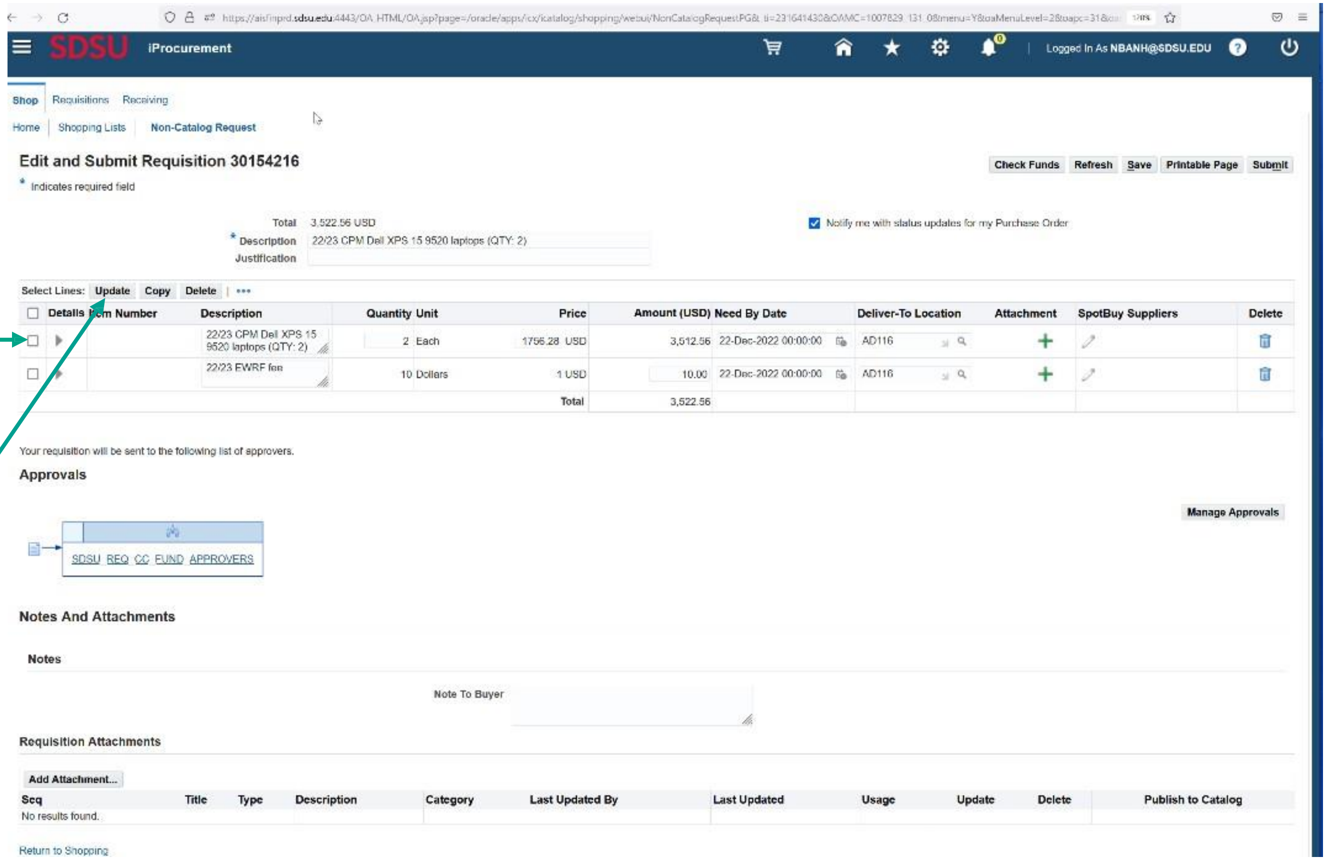
Click **Edit**

Step 7

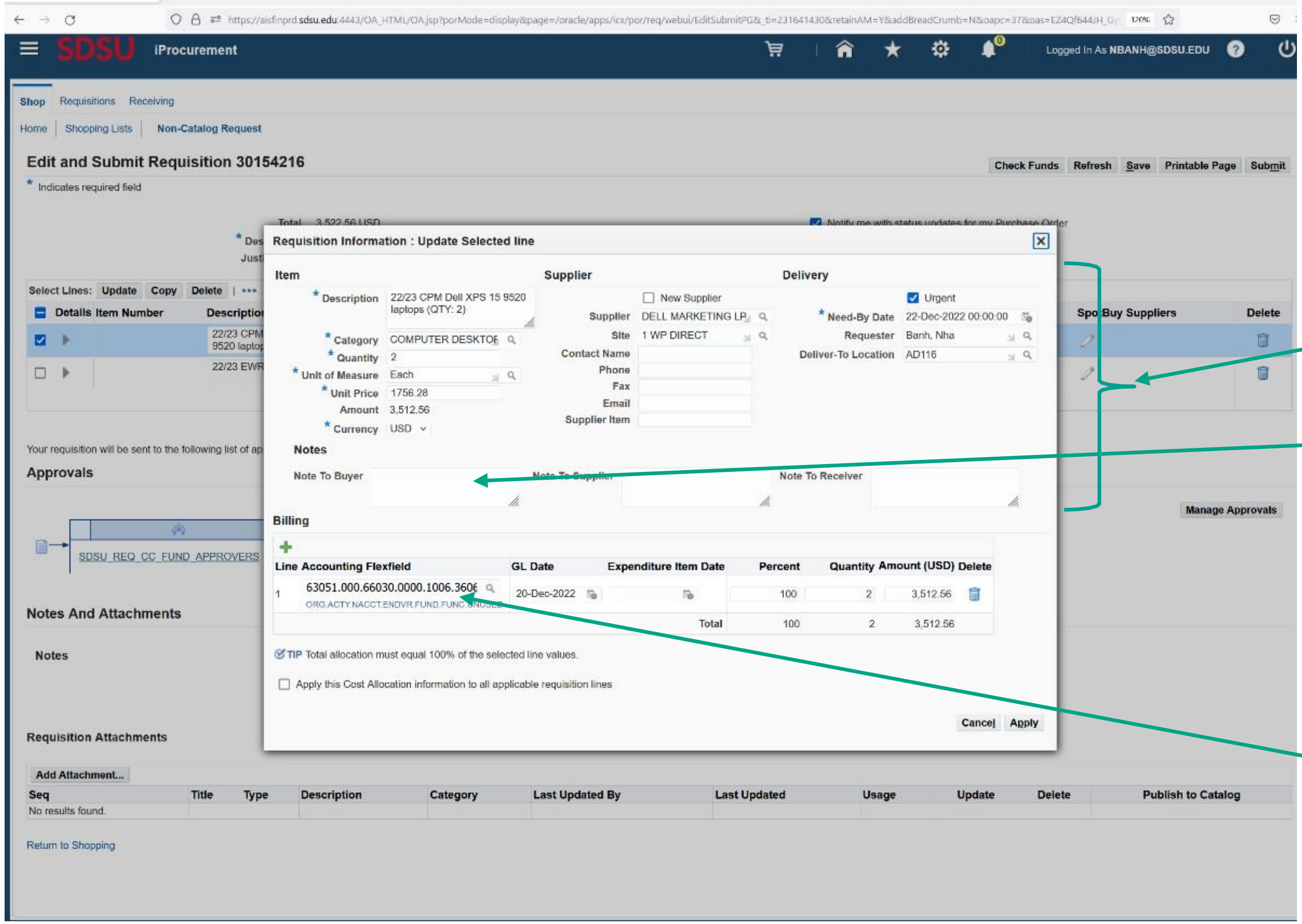
Review & Edit Account String

(a) Click on the checkbox

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



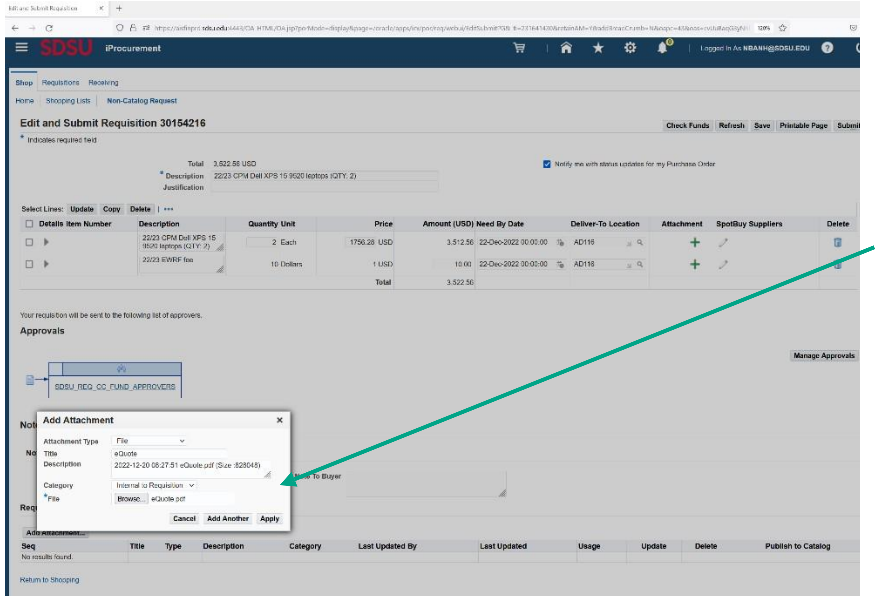
Opportunity to Revise & Add Information



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

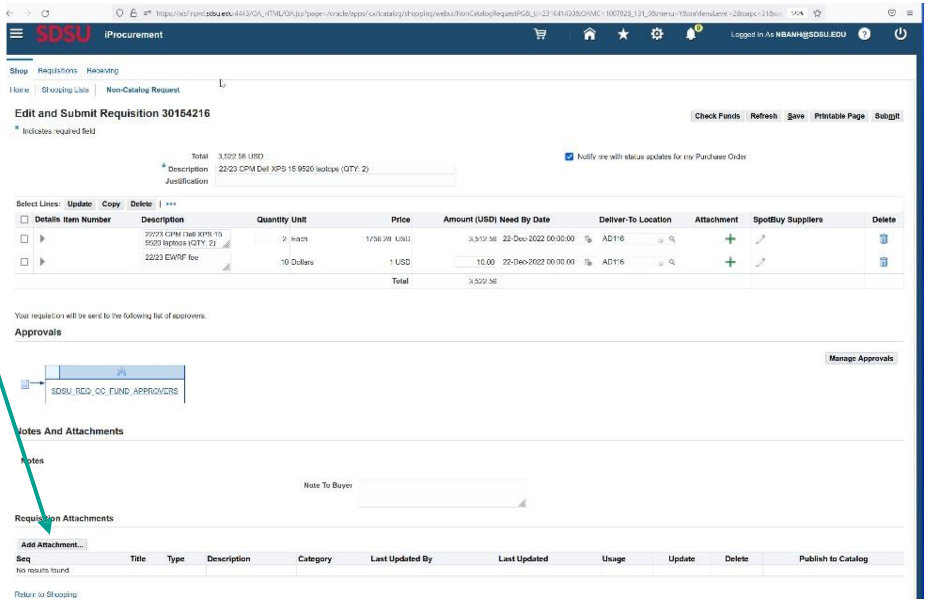


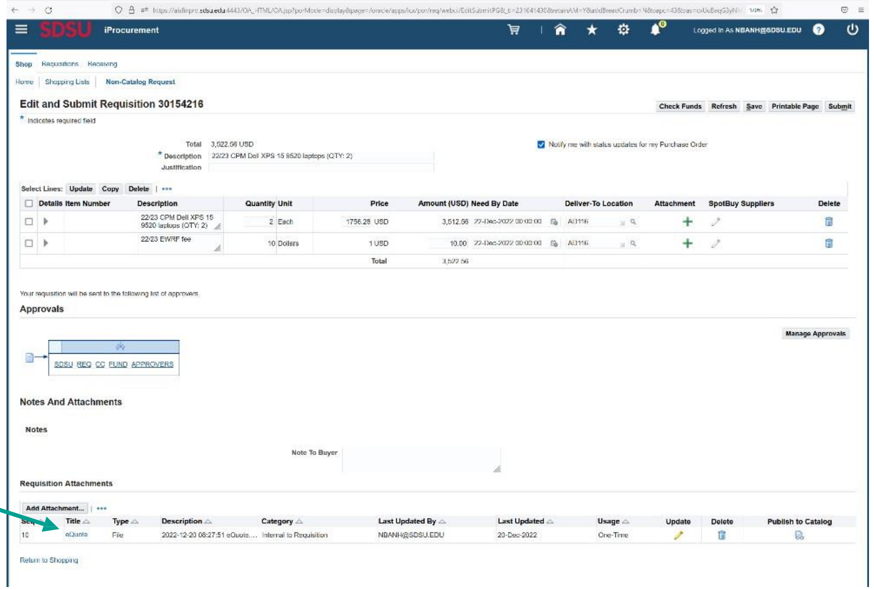
Click **Add Attachment** to attach your documents (e.g., Quote, TARP, proposal or contract received from vendor).

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

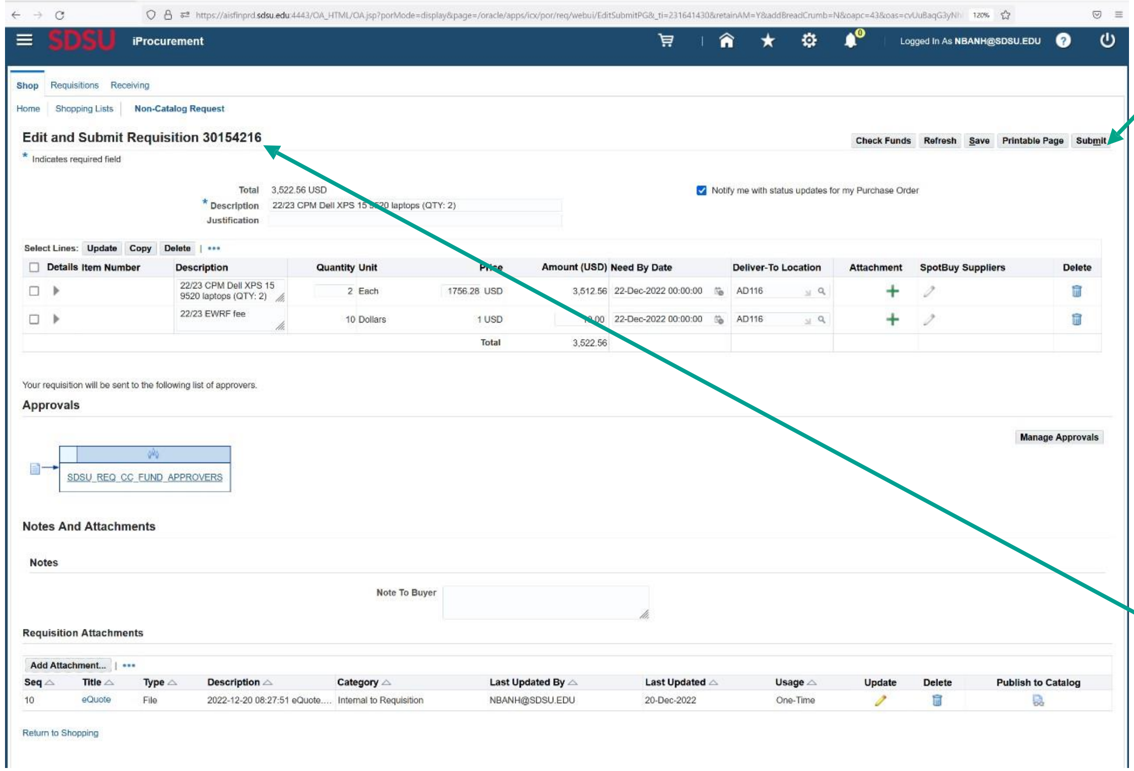
If you have multiple documents to attach, click **Add Another** after each document until the last attachment. After the last attachment, click **Apply**

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

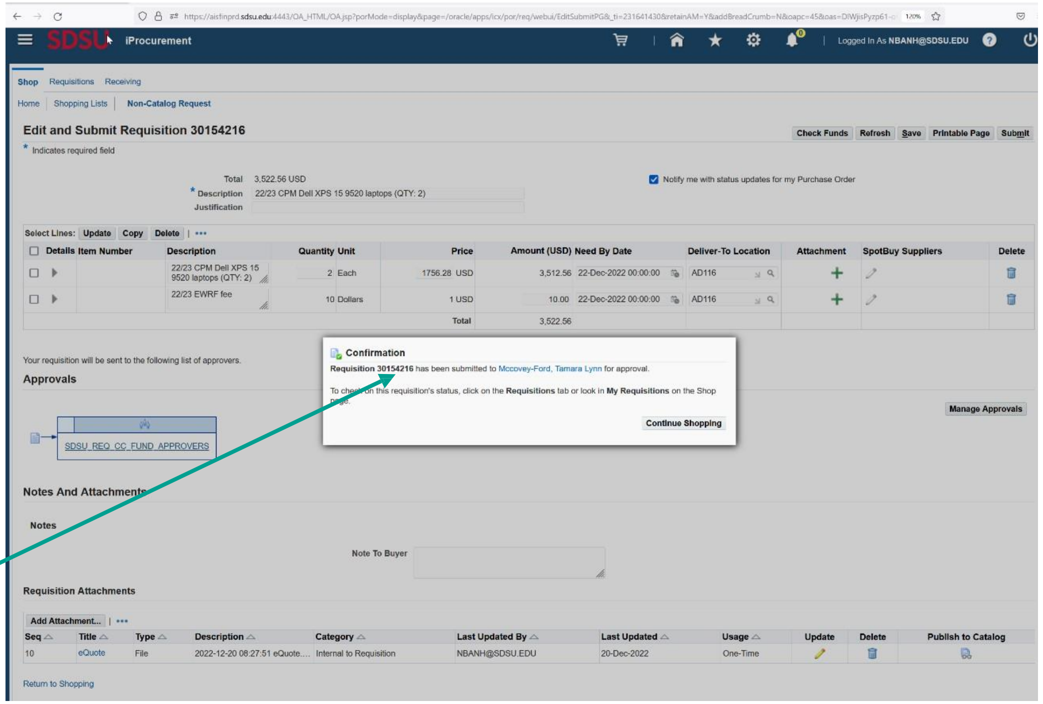




Step 9



Click **Submit**



Record the requisition number for your records

Thank You

Please contact p2pcampuscare@sdsu.edu if you have any questions.