


EAS Purchase Requisitions PTA Requisition Entry

How Enter EAS Purchase Requisitions charged to a
Project, Task and Award.

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

GW Finance Division



EAS Purchase Requisitions PTA Requisition Entry

Topics

- Overview
 - New PO vs. Existing PO
 - Requisition Line Types
 - Categories (NIGP Codes)
- Enter New EAS Requisition
- Attach Documents (pdf, doc, xls, etc.)
- Submit for Approval
- Enter Requisition to Change Existing PO


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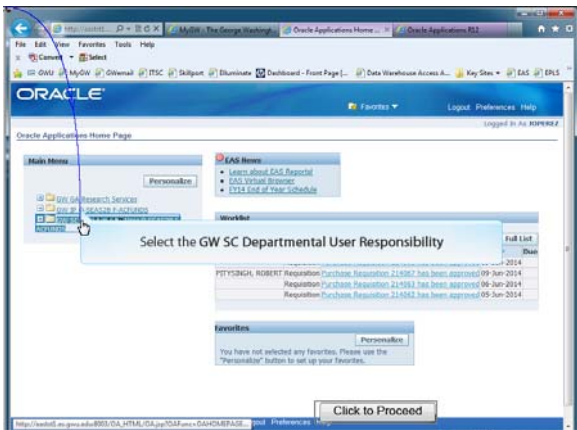
EAS Purchase Requisitions PTA Requisition Entry

Overview


- **Add to an Existing PO**
 - When additional funds are needed on an existing PO a new requisition is created and linked to the existing PO
- **Requisition Line Types**
 - Goods: tangible products generally sold at a fixed unit price
 - Services: intangible services generally sold hourly
 - QuickPay: Goods type line with a total PO cost less than \$2,500, all PO lines must be QuickPay line type
 - Leases: Monthly rental or lease agreements, work with Procurement prior to use
- **Categories (NIGP Codes)**
 - A National Institute of Governmental Purchasing (NIGP) code defines the products/services that a vendor provides
 - Vendors receive solicitations based on the NIGP codes that they register


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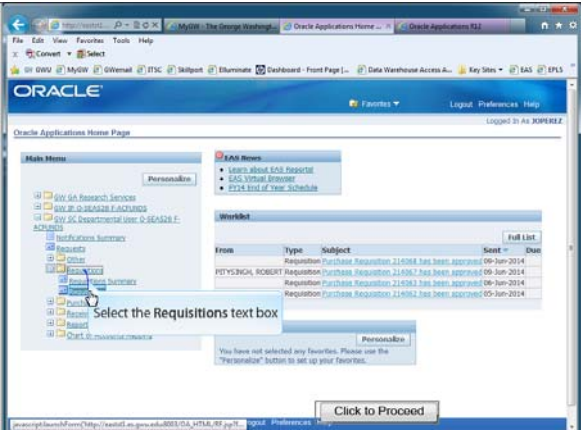
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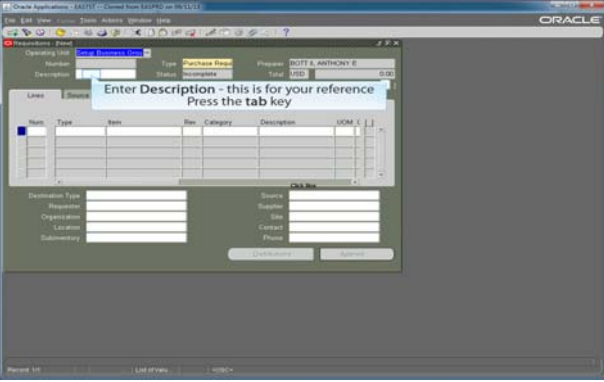


The screenshot shows the Oracle Applications Home Page. On the left, there is a 'Main Menu' with various options like 'My SA Research Services', 'My PTA Requisitions', and 'My Requisitions'. A red box highlights the 'My Requisitions' option with the text 'Select the Requisitions text box'. On the right, there is a 'Worklist' table with columns 'From', 'Type', 'Subject', 'Sent On', and 'Date'. The table contains three rows of requisition data. Below the table is a 'Click to Proceed' button.

Notes:



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The screenshot shows the Oracle Requisition Entry form. At the top, there is a header with 'Enter Description - this is for your reference Press the tab key'. Below this is a table with columns 'Item', 'Type', 'Item', 'Category', 'Description', and 'UOM'. There are also several input fields for 'Description Type', 'Requester', 'Organization', 'Location', 'Submitter', 'Source', 'Requester', 'Site', 'Contact', and 'Phone'. A 'Click Here' button is located below the input fields.

Notes:


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EAS Purchase Requisitions PTA Requisition Entry

The screenshot shows the Oracle EAS PTA Requisition Entry window. The 'Operating Unit' is 'Setup Business Group', 'Type' is 'Purchase Req.', and 'Status' is 'Incomplete'. A 'Requisition Headers' dialog box is open, asking 'Add to Existing PO?' with 'Yes' selected. A callout box points to the dialog with the text 'Enter Yes or No Select OK'. Another callout box points to the 'Add to Existing PO?' field with the text 'If Yes another field will open for the PO number Select OK'. The 'Click to Proceed' button is visible at the bottom right.

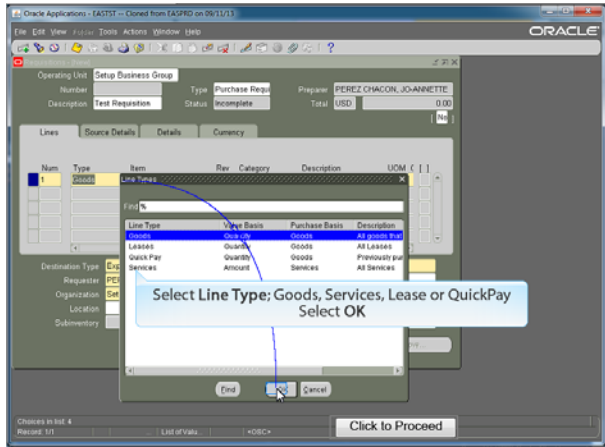
Notes:

EAS Purchase Requisitions PTA Requisition Entry

The screenshot shows the Oracle EAS PTA Requisition Entry window. The 'Operating Unit' is 'Setup Business Group', 'Type' is 'Purchase Req.', and 'Status' is 'Incomplete'. The 'Lines' tab is active, showing a table with columns: Num, Type, Item, Rev, Category, Description, UOM. The first row has 'Goods' in the 'Type' column. A callout box points to the 'Type' column with the text 'Default Line Type is Goods other options are: Services, QuickPay and Leases'. The 'Destination Type' is 'Expense', 'Requester' is 'PEREZ CHACON, JO-ANNETTE', and 'Supplier' is 'Supplier'. The 'Click to Proceed' button is visible at the bottom right.

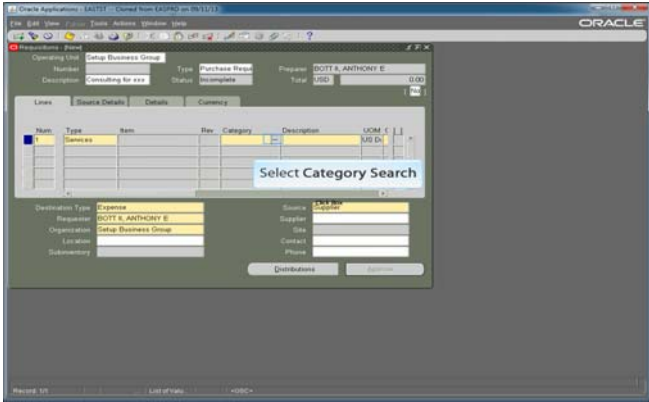
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EAS Purchase Requisitions PTA Requisition Entry



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EAS Purchase Requisitions PTA Requisition Entry

The screenshot shows the Oracle EAS PTA Requisition Entry form. The 'Accounts' table is the primary focus, with a callout box labeled 'Select Project' pointing to the 'Project' column. The table has the following columns: 'Num', 'Date', 'Recovery Rate', 'OL Date', and 'Budget Account'. The first row contains the value '500' in the 'Num' column and '22-AUG-2014' in the 'OL Date' column. Below the table, there are fields for 'Account Description', 'Charge', 'Actual', 'Budget', and 'Variance'. The 'Location' field is set to '46155 RESEARCH PLACE - CA'. At the bottom, there are 'Distributions' and 'Approve' buttons, and a 'Click to Proceed' button.

Notes:

EAS Purchase Requisitions PTA Requisition Entry

The screenshot shows the Oracle EAS PTA Requisition Entry form. The 'Accounts' table is populated with the following data:

Num	Project	Task	Award	Expenditure Type	Org	Dr	Cr
54803			CCNS21156F	LABORATORY SUJ			176101%

A callout box labeled 'Enter Project, Task, Award, Expenditure Type and Expenditure Org' points to the 'Project', 'Task', 'Award', 'Expenditure Type', and 'Org' columns. Below the table, there are fields for 'Account Description', 'Charge', 'Actual', 'Budget', and 'Variance'. The 'Location' field is set to '46155 RESEARCH PLACE - SA'. At the bottom, there are 'Distributions' and 'Approve' buttons, and a 'Click to Proceed' button.

Notes:

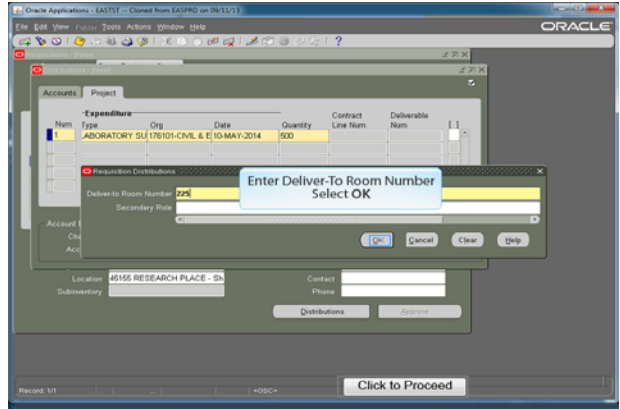
EAS Purchase Requisitions PTA Requisition Entry

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EAS Purchase Requisitions PTA Requisition Entry

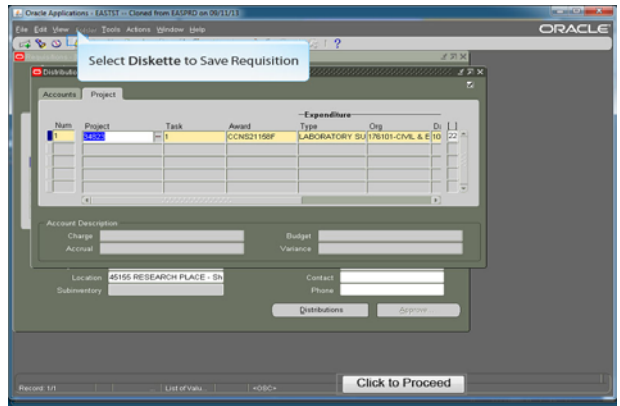
Notes:

EAS Purchase Requisitions Requisition Entry



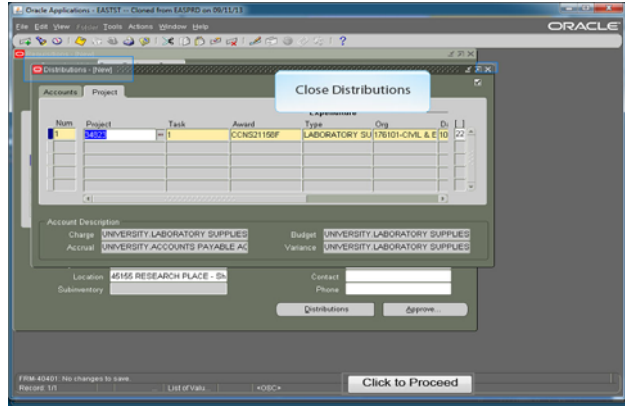
Notes:

EAS Purchase Requisitions PTA Requisition Entry



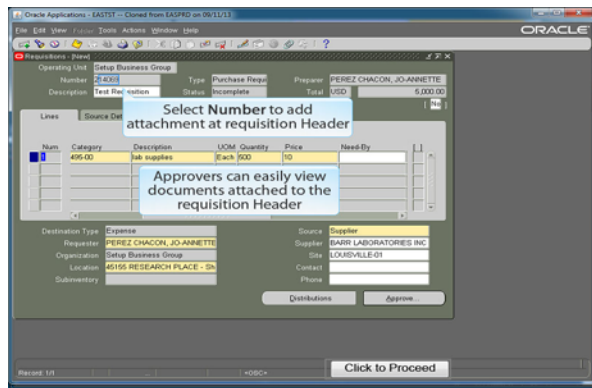
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**EAS Purchase Requisitions
PTA Requisition Entry**



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PTA Requisition Entry**



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**EAS Purchase Requisitions
PTA Requisition Entry**

The screenshot displays the Oracle Applications PTA Requisition Entry window. The 'Operating Unit' is '21400' and the 'Requisition Number' is '14300'. The 'Description' is 'Text Requisition'. A 'Select Paperclip icon' tooltip is visible over the 'Attachments' tab. The 'Lines' table shows one line with 'Category' '495-00', 'Description' 'Lab supplies', 'UOM' 'Each', 'Quantity' '10', and 'Price' '6,000.00'. The 'Requestor' is 'PEREZ CHACON, JOANNETTE' and the 'Supplier' is 'BARR LABORATORIES INC'. The 'Location' is '45165 RESEARCH PLACE - 00'. A 'Click to Proceed' button is at the bottom right.

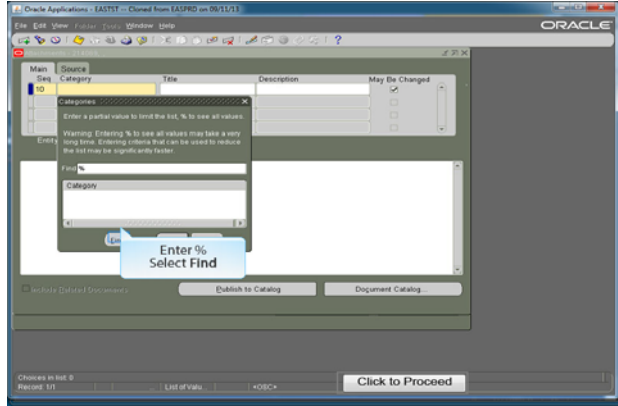
Notes:

**EAS Purchase Requisitions
PTA Requisition Entry**

The screenshot displays the Oracle Applications PTA Requisition Entry window with the 'Select Category' dialog box open. The dialog box has fields for 'Main', 'Source', 'Title', and 'Description'. Below the dialog box, there are 'Publish to Catalog' and 'Document Catalog' buttons. The status bar at the bottom shows 'Record 15' and a 'Click to Proceed' button.

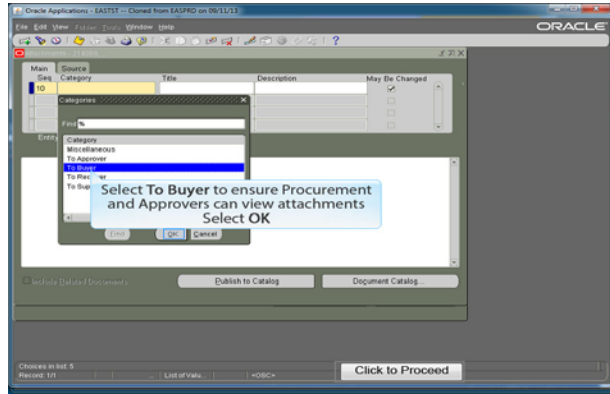
Notes:

EAS Purchase Requisitions PTA Requisition Entry



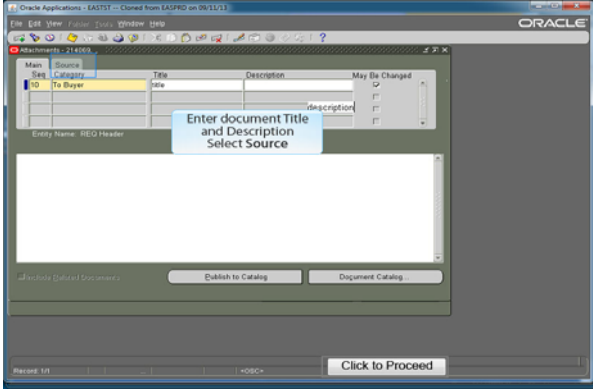
Notes:

EAS Purchase Requisitions Non-PTA Requisition Entry



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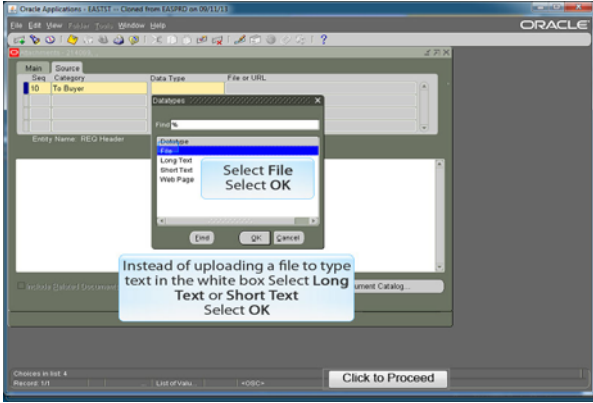
EAS Purchase Requisitions PTA Requisition Entry



The screenshot shows the Oracle EAS PTA Requisition Entry form. A callout box with a blue background and white text says "Enter document Title and Description Select Source". The form has fields for "Seq", "Category", "Title", "Description", and "May Be Changed". Below the form is a "Click to Proceed" button.

Notes:

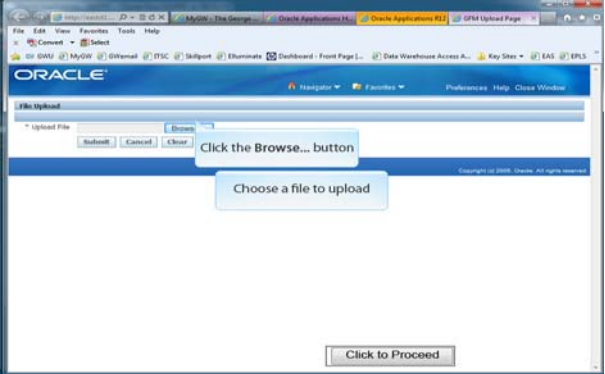
EAS Purchase Requisitions PTA Requisition Entry



The screenshot shows the Oracle EAS PTA Requisition Entry form. A callout box with a blue background and white text says "Instead of uploading a file to type text in the white box Select Long Text or Short Text Select OK". A dialog box titled "Data Types" is open, showing options for "File", "Long Text", "Short Text", and "Web Page". The "Long Text" option is selected. The form has fields for "Seq", "Category", "Data Type", and "File or URL". Below the form is a "Click to Proceed" button.

Notes:

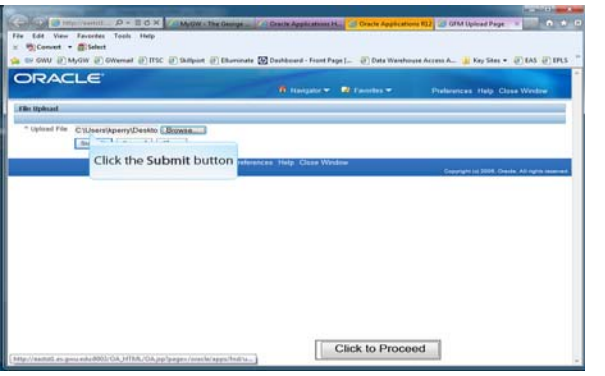
EAS Purchase Requisitions Non-PTA Requisition Entry



The screenshot shows the Oracle EAS File Upload interface. A callout box points to the 'Browse...' button next to the 'Upload File' field. Another callout box says 'Choose a file to upload'. A 'Click to Proceed' button is visible at the bottom of the page.

Notes:

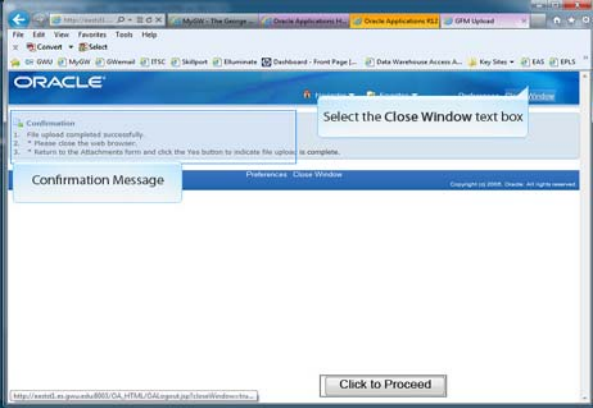
EAS Purchase Requisitions Non-PTA Requisition Entry



The screenshot shows the Oracle EAS File Upload interface. A callout box points to the 'Submit' button. Another callout box says 'Click the Submit button'. A 'Click to Proceed' button is visible at the bottom of the page.

Notes:

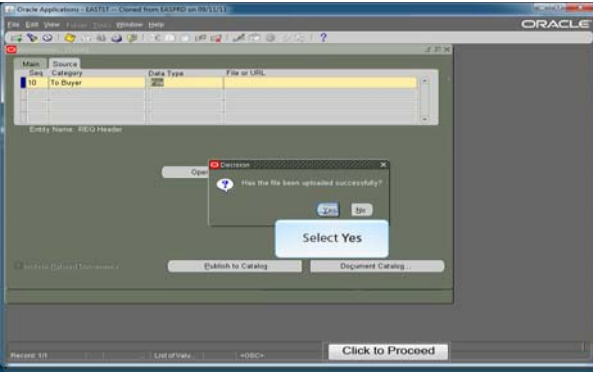
EAS Purchase Requisitions Non-PTA Requisition Entry



The screenshot shows a web browser window displaying an Oracle EAS confirmation message. The message text reads: "Confirmation: 1. File upload completed successfully. 2. Please close the web browser. 3. Return to the attachments form and click the Yes button to indicate file upload is complete." Below the message is a "Click to Proceed" button. A callout box points to the "Close Window" link in the message header with the text "Select the Close Window text box".

Notes:

EAS Purchase Requisitions Non-PTA Requisition Entry



The screenshot shows the Oracle EAS interface with a decision dialog box open. The dialog box asks "Has the file been uploaded successfully?" and has "Yes" and "No" buttons. A callout box points to the "Yes" button with the text "Select Yes". The background interface shows a table with columns "Main", "Source", "Data Type", and "File or URL", and a row with "10" in the "Main" column and "To Buyer" in the "Source" column. Below the table is an "Entity Name: REG Header" field. At the bottom of the screen is a "Click to Proceed" button.

Notes:

EAS Purchase Requisitions Non-PTA Requisition Entry

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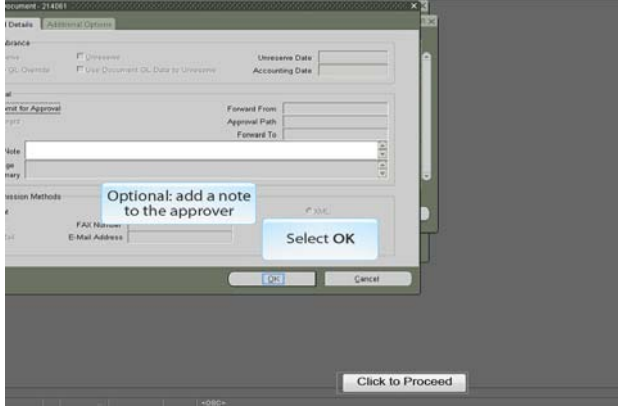
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Optional: add a note to the approver

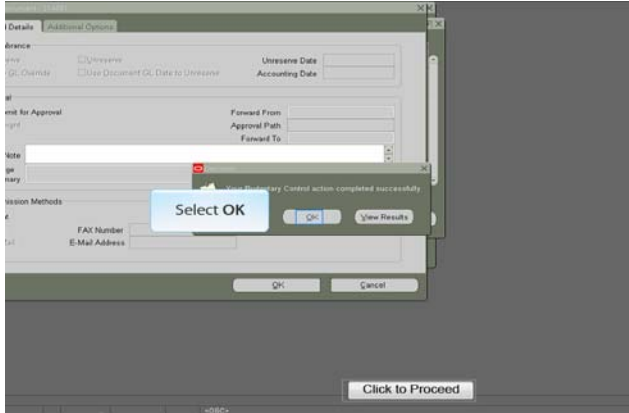
Select OK

Click to Proceed

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EAS Purchase Requisitions Non-PTA Requisition Entry



Select OK

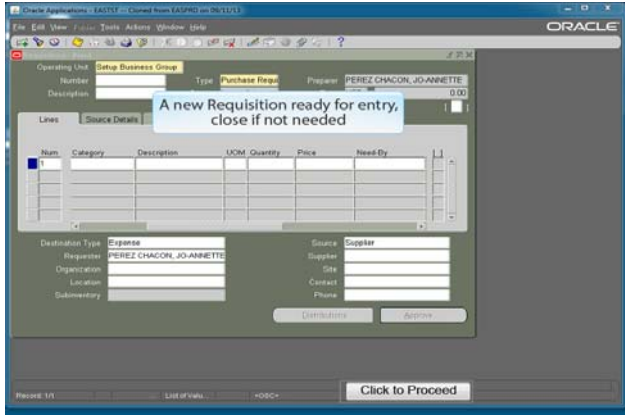
Business Dictionary Control action completed successfully

Click to Proceed

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EAS Purchase Requisitions Non-PTA Requisition Entry



The screenshot shows the Oracle EAS Non-PTA Requisition Entry interface. At the top, it displays 'Operating Unit: Setup Business Group', 'Type: Purchase Reqs.', and 'Project: PEREZ CHACON, JOANNETTE'. A central message box states 'A new Requisition ready for entry, close if not needed'. Below this is a table with columns: Num, Category, Description, UOM, Quantity, Price, and Need-By. The table contains one row with '1' in the 'Num' column. To the right of the table are fields for 'Destination Type: Expense', 'Requester: PEREZ CHACON, JOANNETTE', 'Source: Supplier', and 'Supplier'. At the bottom right, there is a 'Click to Proceed' button.

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Requisition Entry and Submission Complete

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