

ITSW1008

How to Issue a Release

The statewide contracts for ITSW1008 are the “order by description” contracts. There are no specific item IDs assigned to these contracts. Below are the screenshots how to issue a release against the contracts.

Option # A: Issue an e-Pro requisition

A.1. Select “Special Request” tab, and click on “Special Item” link

The screenshot displays the Oracle e-Pro requisition system interface. At the top, the Oracle logo is visible on the left, and navigation links for Home, Worklist, Add to Favorites, and Sign out are on the right. A Help link is also present. The main heading is 'Create Requisition'. Below this, there are three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. The '2. Add Items and Services' tab is currently active. Below the tabs, there is a search bar with the text 'Add lines to the requisition, specifying the information necessary to procure each item or service.' and a 'Search' button. Below the search bar, there are several tabs: 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Special Request' tab is selected. Below this tab, there is a section titled 'Select a Request Type' with four options: 'Special Item' (circled), 'Fixed Cost Service', 'Variable Cost Service', and 'Time and Materials'. Each option has a brief description. At the bottom of the page, there is a 'Review and Submit' link. The bottom of the browser window shows a 'Done' button and a 'Local intranet' status bar.

A.2. Type specific description of items/services required. For example, if this is for a purchase of product, you may state “IJ-15K Digital Mailing System”, enter a price, quantity and appropriate Unit of Measure. For category code, select the magnify glass next to it as shown below.

Create Requisition

ORACLE

Home Worklist Add to Favorites Sign out

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web **Special Request**

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category:

Vendor ID:

Vendor Item ID:

Mfg ID:

Mfg Item ID:

[Suggest New Vendor](#)

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Local intranet 100%

A.3. On the 'Look Up Category' page, click on the triangle next to "Browse Category Tree"

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Home Worklist Add to Favorites Sign out

[Help](#)

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

| Categories | Customize | Find | First | 1 of 1 | Last |
|----------------|-----------------|--------------------|---|--------|------|
| Catalog | Category | Description | Find in Tree | | |
| 1 | | | <input type="button" value="Find in Tree"/> | | |

javascript:submitAction_win0(document.win0.PV_SR_CATLU_WRK_PV_CAT_GROUPBOX2);

Local intranet 100%

A.4. Click the drop down list and select "ITSW1008MAILROOMC", then select the appropriate category code. In this example, "Automatic postal or mailing machine" is selected.

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Home Worklist Add to Favorites Sign out

Help

Create Requisition

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Find

| Catalog | Category | Description | Find in Tree |
|---------|----------|-------------|--------------|
| 1 | | | |

Browse Category Tree

*Select a catalog: ITSW1008MAILROOMC

Left | Right ITSW1008MAILROOMC

- Mail machine accessories
- Automatic postal or mailing m
- Electrical Equipment software
- Office equipment rental or lea
- Systems integration design
- Maintenance or support fees

javascript:submitAction_win0(document.win0,'#ICSetFieldPV_CAT_SELECT_SEC.PV_CATTREE_FC.S3');

Local intranet 100%

A.5. The category code for automatic postal or mailing machine is entered by the system. Complete with the vendor ID. And select "Add Item".

Create Requisition

ORACLE

Home Worklist Add to Favorites Sign out

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog Favorites Templates Forms Web Special Request

Special Item

*Item Description: IJ-15K Digital Mailing System

*Price: 9600.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: EA

*Category: 44102109 Due Date: 81

Vendor ID: 0000078313 [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

☐ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

Add Item Cancel Add and Start New Type

Local intranet 100%

A.6. Select the step #3: Review and Submit to see a line item or repeat the steps #2-5 to add additional items/services as needed.

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Home Worklist Add to Favorites Sign out

Help

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog Favorites Templates Forms Web Special Request

Special Item

*Item Description:

*Price: *Currency:

*Quantity: *Unit of Measure:

*Category: Due Date:

Vendor ID: [Suggest New Vendor](#)

Vendor Item ID:

Mfg ID:

Mfg Item ID:

Additional Information

Local intranet 100%

A.7. Select the "line detail" icon on line #1.

Create Requisition

ORACLE

Home Worklist Add to Favorites Sign out

Help

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Office of State Finance *Origin: OSF

*Requester: Gai Hunter (090) *Currency:

Requisition Name: Priority:

Requisition Lines

| Line | Description | Vendor Name | Quantity | UOM | Price | Total |
|--|----------------------------|---------------------------------------|----------|------|-----------|--------------|
| 1 | U-15K Digital Mailing Syst | NEOPOST INC | 1.0000 | EACH | 9,600.000 | 9,600.00 |
| SS/SW Exception <input type="checkbox"/> | | Line SS/SW Type: <input type="text"/> | | | | |
| Total Amount: | | | | | | 9,600.00 USD |

☐ Select All / Deselect All

Justification/Comments

☒ Send to Vendor ☐ Show at Receipt ☐ Show at Voucher

javascript:submitAction_win0(document.win0,'GOTO_LINE_DTLS\$0');

Local intranet 100%

A.8. Change a default buyer to an appropriate buyer.

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Home | Worklist | Add to Favorites | Sign out

Buyer: [Buyer Information](#)

Vendor: [Suggest New Vendor](#)

Vendor Location: [PO BOX 1183](#)

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID: [UPN ID:](#)

Manufacturer's Item ID:

Physical Nature:

☐ RFQ Required
 ☐ Zero Price Indicator
 ☐ Inspection Required

☐ Device Tracking
 ☐ Stockless Item

[Configuration Info](#)

Contract

Contract ID: Line:

Sourcing Controls

☐ Calculate Price
 ☐ Inventory Source Flag

OK Cancel

A.9. Change the vendor location to the awarded location. Add contract ID. Line number is not required because this is the order by description statewide contract.

Create Requisition

ORACLE®

| | | | |
|----------------------|--------------------------|----------------------------------|--------------------------|
| Home | Worklist | Add to Favorites | Sign out |
|----------------------|--------------------------|----------------------------------|--------------------------|

postal or mailing m

Buyer: GHUNTER 🔍 [Buyer Information](#)

Vendor: 0000078313 🔍 NEOPOST INC [Suggest New Vendor](#)

Vendor Location: 0017 🔍 478 WHEELERS FARMS RD

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID: 🔍 UPN ID:

Manufacturer's Item ID: 🔍

Physical Nature: Goods ▾

☐ RFQ Required
 ☒ Zero Price Indicator
 ☐ Inspection Required

☒ Device Tracking
 ☒ Stockless Item

[Configuration Info](#)

> Contract

Contract ID: 0000000000000000000003157 🔍 Line: _____

> Sourcing Controls

☐ Calculate Price
 ☒ Inventory Source Flag

OK

Cancel

A.10. Complete the requisition as needed.

Option # B: Issue a non e-Pro requisition (regular way of requisition/purchase order creation).

B.1. Enter category code (must match one of the category codes assigned to the SW contract), description, quantity and preferred unit of measure. Go to “vendor information” tab and enter vendor ID and location. Then go to “contract” tab and insert the appropriate contract ID. Line number is not required. Complete other information as needed.

The screenshot shows the Oracle Add/Update Requisitions web application. The header includes the Oracle logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. The main form area contains the following sections:

- Requisition ID:** NEXT, with a [Copy From](#) link.
- Budget Status:** Not Chk'd, with a ☐ **Hold From Further Processing** checkbox.
- Header Section:**
 - *Requester:** GHUNTER (Gai Hunter (090)), with links for [Requester Info](#), [Requester Defaults](#), [Add Comments](#), and [Requester Activities](#).
 - *Requisition Date:** 05/21/2012.
 - *Origin:** OSF (Office of State Finance).
 - *Currency Code:** USD (Dollar).
 - *Accounting Date:** 05/21/2012.
- Amount Summary:** Total Amount: 9,600.00 USD.
- Add Items From:** [Purchasing Kit](#), [Catalog](#), [Item Search](#), [Requester Items](#).
- Line Table:**

| Line | Item | SS/SW Exception | Line SS/SW Type | Description | Vendor | Vendor Name | Location |
|------|------|-----------------|-----------------|-----------------------|------------|-------------|----------|
| 1 | | | | U-15K Digital Mailing | 0000078313 | NEOPOST INC | 0017 |
- Actions:** [View Printable Version](#), [Save](#), [Notify](#), [Refresh](#), [Add](#), [Upd](#).

The bottom status bar shows "Done" and "Local intranet".



▼ Header

Total Amount: 9,600.00 USD

[Requester Items](#)

*Go to:

 Update/Display