OUM

Punjab State Power Corporation Limited (PSPCL).

DO.070 Oracle Purchase, Procurement Contract, Inspection User Manual.

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1 LOGIN ORACLE APPLICATION.

To start Oracle Applications, you need to:

- Start up your computer system
- Start your Web Browser
- Start the Oracle Applications program
- Log on to Oracle Applications
- Choose a responsibility
- Navigate to an application window

After starting Oracle Applications, the first window you see is the sign-on window.

You need an Oracle Applications username and password, also known as an Oracle Applications sign–on, to log on to Oracle Applications. It is different from the username and password you use to log on to your computer. If you are not sure of your Oracle Applications sign–on, consult your system administrator. Oracle Applications security is based on your Oracle Applications sign–on. Your sign–on connects you to your responsibilities, which control your access to applications, functions, reports, and data.

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ORACLE						
			User Name			
			Password			
			Log In	Cancel		
			Login Assistance <u>Register Here</u> Accessibility			
			None Language	×		
			English	✓		

To Log on to Oracle Application:

1. Enter your username in the User Name field.

Attention: Do not press [Enter] after entering each item, as [Enter] is normally used to accept the default button. Instead, use [Tab] or the mouse to navigate between fields.

2. Enter your password in the **Password** field.

3. Choose Connect.

Notice your password does not appear as you type it, to prevent others from seeing it. Keep Your password confidential to prevent access to Oracle Applications by unauthorized users. After successful login, responsibility list will come.

1.1 Choosing a Responsibility.

If you are an authorized user of Oracle Applications, one of two things occurs after you Sign on to Oracle Applications:

The Navigate window appears listing your current responsibility in the window title.
 A window containing a list of responsibilities appears.

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E Contracts Terms Library Administrator		Full List				l
Cost Management						l
Cost Management - SLA	From	Type Subject Sent Due				l
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Functional Developer						
General Ledger Super User	TIP Vacation Rules - Redirect or a Table Diagnostics	auto-respond to notifications.				
India Local Payables	Table Diagnostics					
iProcurement						
iSupplier Portal Full Access						
Order Management Super User						
PSPCL Accounts Payable						
PSPCL HRMS Manager						
PSPCL Inventory Super User						
PSPCL Payables Super User						
PSPCL Project Costing Super User						
PSPCL Purchase User	1					
PSPCL Purchasing Super User	-					
System Administrator						
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To choose a responsibility:

If your sign-on displays a Responsibilities window, use one of the following methods to choose a responsibility:

- 1. Use the [Up arrow] and [Down arrow] keys to select a value and press [Return].
- 2. Use your mouse to select a value and choose OK.
- 3. Double-click your mouse directly on a value to choose it.

A Navigate window appears displaying the name of the responsibility you choose. You are now ready to start working.

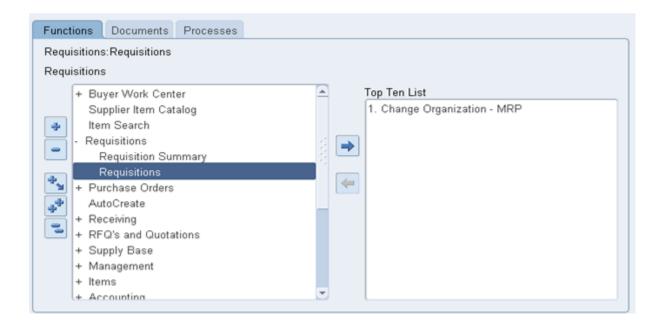


Click on purchase requisition to any form.

2 ENTERING REQUISITIONS:

Purchase Requisition is the document by which the Purchasing Authority is requested to procure goods and services. The Purchase Requisitions shall carry all relevant details about the items or services to be procured and the following are the key data elements in a Purchase Requisition.

- 1. Item Code and or Description of the Item to be procured along with the Item Category
- 2. Quantity Required and suggested Price
- 3. Date when the goods are required. (Need by Date)
- 4. Justification for the requirement
- 5. Place and the store where the goods are required
- 6. Suggested Supplier Name and site
- 7. Accounting information
- 8. The Requestor name



2.1 Creation of Purchase Requisition

In the manual creation of Purchase Requisition Process, Purchase requisitions are raised by using the Requisition Entry Screen where all details about the required item / service are entered and the document is submitted for Approval.

During the manual creation of Purchase Requisitions, the following information has to be entered:

<u>Requisition Headers:</u> This is where the Requisition Number and preparer name is captured along with a brief description for the Requisition.

<u>Requisition Lines:</u> In Requisition lines, the information on the Item/Service requested and the price, required date and all other information about the item, that is being requested must be entered. <u>Distributions:</u> In this zone, the accounting information for the requisition line will be automatically created depending on the nature of the item.

🕸 Navi	gator - PSPCL Purchasing Super User 📃 🗵
Fun	ctions Documents Processes
Ora	cle Purchasing:Requisitions:Requisition Summary
Rec	quester Workbench
	 Requisitions Requisition Summary Requisitions House Order Summary Purchase Orders Releases
	Open Open pand or collapse the navigation list:
2. Ch	oose one of the following methods to expand an expandable item to its next sub-lev Double-click on the item. Select the item and choose Ope n. Select the item and choose the Expand button. oose one of the following methods to collapse an expanded item: Double-click on the item. Select the item and choose the Collapse button. expand or collapse several items at once, choose one of the following buttons: Expand All Children → Expand all the sub-levels of the currently selected item. Expand All → Expand all the sub-levels of all expandable items in the navigation list.

2.2 USING THE TOP TEN LIST

If there are forms that you use frequently, you can copy them over to a navigation top ten list located on the right-hand side of the Navigate window. The top ten lists display your forms numerically so you can choose them instantly without having to search for them in the navigation list. You can add a maximum of ten forms to the top ten lists and you can create a different top ten list for each responsibility you have access to.

unctions	Documents	Processes			
racle Pu	rchasing:Receiv	ing:Returns			
eturns					
- 0	racle Purchasing	3			Top Ten List
	Supplier Item C	atalog			1. Receipts
*	Item Search		1		2. Receiving Transactions
	Requisitions		1		3. Receiving Transaction Summary
-	Requisition S	Summary			4. Purchase Order Summary
	Requisitions				5. Purchase Orders
* +	Buyer Work Ce	enter		-	6. Releases
*	AutoCreate				7. PO Orders Summary Page
- 1	Receiving				8. AutoCreate Documents
	Receipts				9. Receipts
	Returns				0. Returns
	Receiving Tra	insactions			
	Corrections				
•	11111		Þ		

Note: A top ten list is unique for the responsibility and user sign-on combination you use.

To create Navigation top ten list:

- 1. Select a frequently used form from the navigation list.
- 2. Choose the arrow pointing to the Top Ten List.

The form now appears in the navigation top ten list preceded by a top ten list number.

To open a form from the navigation top ten list:

1. Type the top ten list number that precedes the form you want to open. You can also select the form you want and choose **Open**, or double–click on the form name.

Notice that the name and description of that form also appear in the current selection fields Above the navigation list.

2.3 ORACLE APPLICATION TOOL BAR

You can invoke functions that are identical to specific menu items by choosing buttons from the toolbar. The toolbar replicates many commonly used menu items so you can invoke heir actions quickly without having to search for them in the menu. The following table is representing the applications toolbar.

Eile Edit View Folder Tools Actions Window Help

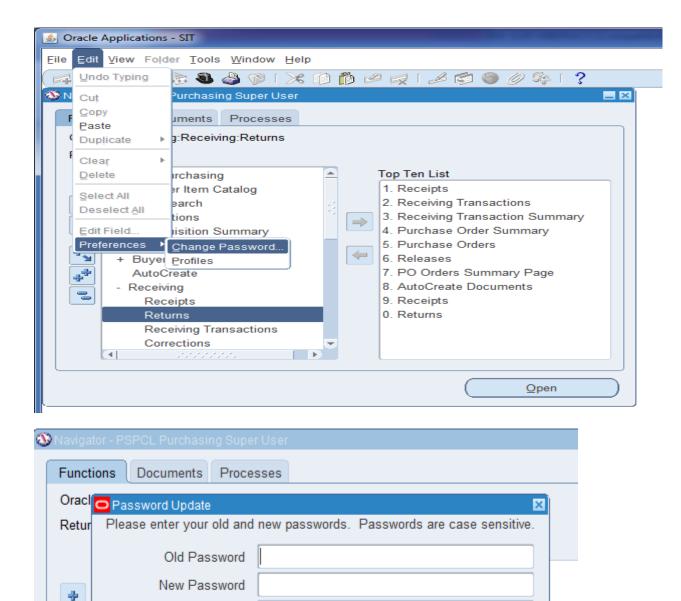
	Save	Save and Pending Changes
	Print	Prints the Current Screen
B	Find	Invokes the Query Mode
3	Show Navigator	This will show the main Navigator Screen
3	Switch Responsibility	This will Switch the Responsibility
	Close Form	This will Close the Current Form
-	New Record	Creates a New Record
1	Clear Record	Clear all data pertaining to the current record
IX.	Delete Record	Deletes thee current record from the database (NOTE : You must Save to complete delete)
A	Edit	Opens the Editor window for current field
۲	Translations	Opens the Translation Window
0	Attachment	Opens the Attachment Window
?	Window Help	Display General help for the current application

list of keyboard shortcuts:

Function	Key	
Block Menu	Ctrl+B	
Clear Block	F7	
Clear Field	F5	
Clear Form	F8	
Clear Record	F6	2
Commit	Ctrl+S	Contraction of the
Count Query	F12	ŝ
Delete Record	Ctrl+Up	1
Display Error	Shift+Ctrl+E	
Down	Down	
Duplicate Field	Shift+F5	
Duplicate Record	Shift+F6	
Edit	Ctrl+E	-
Enter Query	F11	
Execute Query	Ctrl+F11	
Exit	F 4	
Function 0	Shift+Ctrl+F10	
Function 1	Shift+Ctrl+F1	
Function 2	Shift+Ctrl+F2	
Function 3	Shift+Ctrl+F3	
Function 4	Shift+Ctrl+F4	
Function 5	Shift+Ctrl+F5	
Function 6	Shift+Ctrl+F6	
	5 DEG. ON 1 FT	

2.4 To Change password form level

- 1. Click in the Navigate window or choose **Navigator** from the Window menu to make the Navigate window active.
- 2. Choose **Change Password...** from the Edit, Preferences menu, to display the Password Update window.



3. Enter your old password in the Old Password field.

Re-enter New Password

AutoCreate

- 4. Enter your new password in the New Password field.
- 5. Enter your new password again in the **Re-enter New Password** field.
- 6. Choose OK.

+

If the second entry of your new password does not match your first, Oracle Applications asks You to re-enter your new password again, until both entries match. Your new password takes effect immediately.

OK

7. PO Orders Summary Page

Cancel

hary

Note: If you change your mind and do not want to alter your password, choose Cancel to close the Password Update window.

2.5 EXITING THE ORACLE APPLICATIONS

When you complete your work, you can choose to save or discard any unsaved work in your form(s) before exiting Oracle Applications.

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Place on Navigator				
Log on as a Different User	ng	-	Top Ten List 1. Receipts	
Switch Responsibility	Catalog		2. Receiving Transactions	
			3. Receiving Transaction Summary	
Print	Summary		4. Purchase Order Summary	
<u>Close Form</u>	s		5. Purchase Orders	
	Center		6. Releases	
AutoCreate			7. PO Orders Summary Page 8. AutoCreate Documents	
Receipts			9. Receipts	
Returns			0. Returns	
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Corrections		-		
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- 1. Choose **Exit Oracle Applications** from the Action menu. If there are no changes to save in your window or windows, Oracle Applications asks you to confirm your exit.
- 2. Choose **OK** to exit Oracle Applications and return to your desktop. If there are recent changes that you have not yet saved, a window appears as shown:
- 3. Choose **Save** to save the changes before exiting. Choose **Discard** to exit without saving any changes. Choose **Cancel** to close this window and cancel the exit.

Online Purchase Indent/Purchase Requisitions:- \rightarrow To find the Oracle purchase requisition form, doubleclick on "Requisitions". The following window will appear:

Requisitions - [New] Operating Unit Chi Number Description	ief MM Ty Ty Stat	pe Purchase Requi us Incomplete	Preparer NISHTHA Total INR	MEHTA 0.00
Lines Sourc	e Details Details	Currency		
Num Type	Item	Rev Category	Description	
	л Элэгээлээ		л	
Destination Type			Source	
Requester			Supplier	
Organization			Site	
Location			Contact	
Subinventory			Phone	
Qutside Ser	rvices (Catalog	Distributions	Approve

2.6 Requisition Headers

- Select the requisition type as 'Purchase'. This will default when the form is opened.
- Enter the requisition title in the 'Description' field This could be a brief narration of the requisition.
- The rest of the information at the header like preparer, status and total etc. will be appearing by default based upon the employee name attached to the user and the system setup.
- Data entry begins in the PR header section. The header section contains general information about the PR type, such as the description, the preparer and so on. The header also contains the Description field that preparer my use to enter the business justification.
- You will notice that the preparer field is already populated with your name.

2.7 Requisition Line Details

equisitions - [N									_ [
Operating U	nit Chief MM										
Numb	ber		Type	Purch	ase Requi	Preparer	NISHTHA M	EHTA			
Descripti	00		Status	Incom	nlete	Total	INR		0.0	00	
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Lines	Source Details	6 Det	ails	Curren	псу					_	
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EC1205062 EC1450040	2 Core PV								ancel	Clear	lelp
	2 Core PV 4 Core XL	C LT Cable	e 4 mm2						ancel	Clear	lelp
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EC1450040 EC6050091	2 Core PV 4 Core XLI 11KV XLP	C LT Cable PE LT Cabl E Cable 3/0 9 Mtr	e 4 mm2						ancel	Clear	lelp
EC1450040 EC6050091 ES0016081	2 Core PV 4 Core XLI 11KV XLP PCC Pole	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr	e 4 mm2						ancel	Clear	lelp
EC1450040 EC6050091 ES0016081 ES0016101	2 Core PV 4 Core XLI 11KV XLPI PCC Pole PCC Pole PCC Pole	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr	e 4 mm2 35 mm2						ancel	Clear	lelp
EC1450040 EC6050091 ES0016081 ES0016101 ES001612A	2 Core PV 4 Core XLI 11KV XLPI PCC Pole PCC Pole PCC Pole	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr 11 Mtr	e 4 mm2 35 mm2						ancel	Clear	lelp
EC1450040 EC6050091 ES0016081 ES0016101 ES001612A ET1100046	2 Core PV 4 Core XLI 11KV XLPI PCC Pole PCC Pole PCC Pole ACSR 30n	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr 11 Mtr	e 4 mm2 35 mm2							Clear	<u>l</u> elp
EC1450040 EC6050091 ES0016081 ES0016101 ES001612A ET1100046 ET8200054	2 Core PV 4 Core XLI 11KV XLPI PCC Pole PCC Pole PCC Pole ACSR 30n GSS Wire	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr 11 Mtr	e 4 mm2 35 mm2						ancel	Clear t	<u>l</u> elp
EC1450040 EC6050091 ES0016081 ES0016101 ES001612A ET1100046 ET8200054 Expense Services	2 Core PV 4 Core XLI 11KV XLPI PCC Pole PCC Pole ACSR 30n GSS Wire Expense Services	C LT Cable PE LT Cabl E Cable 3/C 9 Mtr 8 Mtr 11 Mtr	e 4 mm2 35 mm2							Clear	lelp
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Requisition Lines

- Navigate to the Requisition Line Region
- Enter a line Type for the requisition line. Line types help in defining the categorization of the items. The default Line Type is Goods. Additional Line Type such as Services, outside process has been defined to meet the requirements of PSPCL. Based on the kind of items / services to be entered on the requisition line, the user should select the appropriate line type.
- If the item is defined and assigned to the Ship-To inventory organization, then select the appropriate item code.
- If the item is not defined & goods have to be procured, then the requisitioned will skip the item field and enter the item details in the description field after choosing the appropriate purchasing category combination.
- In case the requisition template is defined, the requisitioned may refer the 'Catalog' option when the Item is not defined. This is done by selecting the 'Catalog' button and using the related 'Requisition Template'. All the related requisition lines for that item will be defaulting and the user will only be entering the required quantity in the related field. Similarly, the item and value can be chosen from the Prior purchases window or from the Negotiated Sources options under the catalog.
- Enter the purchasing category. The category cannot be changed if an item code is entered in the Item field. The category shall default from the Item category as entered at the item level.
- When an item code is entered, purchasing displays the item description from the Items window. This description can be changed, as the item is defined with "Allow Description Update" attribute checked.
- Enter the Quantity for the item being requested.

- Enter the UOM (Unit of Measure) to be used for the requisition line. If an item code is entered, Purchasing defaults this UOM from the Item Master.
- Enter the unit Price for the item. The price can be entered in decimal format. If an item code is entered, Purchasing defaults the list price for this item, but the user can change this value.

Enter the Need by date for the requested items. A date greater than or equal to the requisition creation date must be entered. This is the date by which the goods / services are needed by the

Click on the Item field. Enter the item for which the requisition is being raised. You can search for the item, if you do not know the full item number. Click on Ctrl+L or %% tab List of Values and will come. Alternatively, if you know few characters of the item enter then enter some of the character & then use % and press the TAB key. List of item will come & select the item name as per requirement.

On the basis of item category will come by default. Scroll to the right of your screen and enter the quantity that you wish to raise the requisition for. If you know the price of the item, you may enter it in the price column.

C Requisitions - [New] Operating Unit Number Description	Chief MM Type Status	Purchase Requi Preparer NISHTHA MEHTA Incomplete Total INR 0.00
Lines Sou	rce Details Details	Currency
Enter the organization field and location of the company	tuantity Price Neer	d-By Amount Charge Account
Destination Type	Inventory	Source Supplier
Requeste	NISHTHA MEHTA	Supplier
Organization		Site
Location		Contact
Subinventory	1	Phone
Outside S	Services Cat	alog Distributions Approve

The Preparer Name automatically Defaults. Enter Item Number, Qty, price and Need by date. Then Click Distribution and ensure whether the account information correct.

Click on Source details tab of there is any note to be put for the buyer. Buyer who makes purchase order.

OR	equisitions - Operating		nief MM								
	Nu	imber			Туре	Purchase Req	j	Preparer		A MEHTA	
	Descri	iption			Status	Incomplete		Total	INR		120.00
	Lines	Source	ce Details	Details		Currency					
						RFQ Req	uired			Document	
	Num	Note to E	Buyer		Buyer			Supplier Ite	m	Туре	[]
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	Destinat	tion Type	Inventory					Source	Supplier		
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		utside Se	ervices		<u>C</u> ata	alog		Distribution	s	Approv	e

Enter the Requisition Distributions

- Navigate to the Distributions window by selecting the Distributions button in the Requisitions window.
- Enter the Quantity. In case of multiple distributions, quantities must total to the requisition line quantity.

The Account Generator, (a function provided by the Application to generate account codes) will generate the following accounts in the distribution region.

- Charge: The charge account
- Accrual: The AP accrual account
- Variance: The invoice price variance account
- Budget: The budget account to account for encumbrance

Note: With one exception, the user cannot create or update these accounts manually. In case the requisition line destination type is "Expense", the user can change the default charge account supplied by Account Generator. Account Generator automatically builds the accounts (charge, variance, accrual & budget) based on the logic specified as part of the setup.

If the destination type is Inventory, the account codes cannot be changed.

Then Click Distribution and ensure whether the account information correct.

c	counts	Project					
				Recovery			
	Num	Quantity	Charge Account	Rate	GL Date	Budget Account	
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							*

Then save the information. Requisition number is generated automatically. Click on the Approve Button.

	-	to Requisitions	- 100006				-	
	-	Chief MM 100006		· _	irchase Requi complete	Preparer NISH Total INR	THA MEHTA	20.00
Lines	Sou	urce Details	Details	Cu	rrency		L	
Num	Туре	ltem	I	R	ev Category	Description	UOM ([]	
1	Goods	ET11	100046		ACSR.ACSR	ACSR 30mm2	(Weasel) MTR 1	1
								2
	[[4]		00000	[][]		•
Destin	ation Type	-				Source Supp	lier	
	Requeste		/IEHTA			Supplier		
Or	ganizatio	n AO Valuati	on			Site		
	Location	n Patiala				Contact		
Su	binventory	у				Phone		

Requisiiton number has been generated.

Apply Taxes to the Requisition: \rightarrow Tool \rightarrow India tax details.

Requisition Summary Operating Unit Check Eunds 00006 Image Tay Operating Unit Manage Tay Type Purchase Requi Preparer NISHTHA MEHTA Description India Tax Details Status Incomplete Total INR 120.00 Lines Source Details Details Currency Image Tay Image Tay Num Type Item Rev Category Description UOM C Image Tay
Operating Unit Manage Tax Number Unreserve India Tax Details Status Incomplete Total Image Tax Incomplete India Tax Details Status Incomplete Total Image Tax Image Tax India Tax Details Status Incomplete Total Image Tax Image Tax Imag
Lines Source Details Details Currency Num Type Item Rev Category Description UOM ([])
Destination Type Inventory Source Supplier
Requester NISHTHA MEHTA Supplier
Organization AO Valuation Site
Location Patiala Contact
Subinventory Phone
Outside Services Catalog Distributions Approve

System will open as new screen to apply GST tax.

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Financials for India Taxes							
Organization AO Valuation Location Patiala Supplier Tax Invoice Number	Document Number 10 Release Number Original Tax Invoice Number	00006 Currency	Tax Amount GST Document Number	120			
Supplier Tax Invoice Date 22-JUL-2021	Original Tax Invoice Date		GST Document Date				
E-Way Bill No	E-Way Bill Date	E-Way Bill Ac	ceptance Total Amount	120			
Update/Modify Update From Apply to To Proceed Refresh							
2							
Line Num Shipment Number Item	Item Des UOM Quantit	tity Price Assessable Price Lis	t Assessable Value Tax Category	Location Intended Us			
1 ET110004	ACSR 30 MTR 1	10 12		Patiala			
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SL No. Tax Rate Name Tax Type Ta	x Point Basis Assessable Price List Asse	sessable Value 1 2 3	4 5 6 7 8 9 1	0 Currency Tax C			
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Select the line on to which tax category to be applied. Use Ctrl+L or %%+Tab or enter the exact name tax name which is to be applied.

Save the details by using Ctrl+S. System will automatically apply tax as per tax category.

	E-Way Bill No				y Bill Date		E	-Way Bi	II Acce	ptance	0011	Total A				134.4	
	Update/Modify	/		Up	date From												
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e Asse	essable Price List	Assessable Value	Tax Category	Location	Intended l	Jse HSN Co	de	SAC	Code		Li	ne Amo	unt	Тах	Amou	nt Li	ne Total
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	PSPCL_SGST_N																
	PSPCL_SGST_N																
	PSPCL_SGST_N															<u> </u>	

rice	Assessable Price List	Assessable Value	Tax Category	Location	Intended Use	HSN Code	e SAC Code	Line Amo	unt Tax	Amount	Line Tota
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SL N			Tax Conversion Ra	ate UOM	UOM Rate	Tax Rate	Tax Amount	Recoverable Amount			Self A
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SL N	PSPCL_CGST_N		Tax Conversion Ra		UOM Rate	Tax Rate	Tax Amount 7.2	Recoverable Amount			Self A

Use the scroll bar to move toward right to see the details.

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Financials for India Taxes								_ 🗆 ×	
Organization	AO Valuation		Document Numbe	er 100006	Currency INR	Amount	12	20	
Location	Patiala		Release Numbe	er		Tax Amount	14	.4	
Supplier Tax Invoice Number		Origin	al Tax Invoice Numbe	ar		GST Document Number			
Supplier Tax Invoice Date	22-JUL-2021	Ori	ginal Tax Invoice Dat	e		GST Document Date			
E-Way Bill No			E-Way Bill Dat	e	E-Way Bill Acceptance	Total Amount	134	.4	
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Update/Modify									
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rice Assessable Price List As	sessable Value Tax	Category	Location Intend	led Use HSN Cod	e SAC Code	Line Amount	Tax Amount	Line Total	
12	PSI	PCL_CGST_SGST	Patiala			120	14.4	134.4	
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Now exit form the form by closing it & system will ask for the save or not confirmation click on yes & system will give the confimation message.

2.8 Attachment in Purchase Requisition

	Solutions - PSF	PCL				
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	Destination Type	Inventory			Source Supplier	
	Requester	NISHTHA MEHTA			Supplier	
	Organization	PSPCL AO Valuati	on		Site	
	Location	Patiala			Contact	
	Subinventory				Phone	
	Outside Se	ervices	Catalog		Distributions	Approve

As soon we click on attachement the system will open a new window.
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Selcte the category as per requirement.

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Select the data type if a specific file has to be the select the file type as file, If long text has to be write the select the as long text.

ain	Source					
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Entity	Name: REQ Header				loaded successfully?	
Entity	Name: REQ Header					

In the back ground system will open a web page where file has to be uploaded.

File Upload	i	
* Upload File		Browse
	Submit Cancel C	Clear

Click on browse.Select the file document which is to be uploaded.

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🚺 Downloads 强 Recent Places 💷 OneDrive	Fin AS_IS Process Microsoft Word Document 21.9 KB			
✓ → Libraries ▶ → Documents	FortiClientVPNOnlineInstaller_6.4 FortiClient VPN Online Installation Fortinet Inc.			
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Videos Videos Videos	IMG_20180518_002806 JPEG image 6.17 MB			
	✓ IMG_20180518_002836			-
	File name: File Upload			•
	Open	 	Cancel	

Click on open.

File Upload	
* Upload File	C:\Users\VISHNU\Desktc Browse
	Submit Cancel Clear

File has been selected for upload on purchase requisiiton.Click on submit.

System will give the confirmation.

🔒 Confirmation	
1. File upload completed successfully.	
2. * Please close the web browser.	
* Return to the Attachments form and click the Yes button to indicate file upload is complete.	

Go back to the main page click on yes.

Main	Source				
Seq	Category	Title	Description	Data Type	May Be Changed
10	To Approver	Indent attachment	Material indent	File	
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				{	
Entit	y Name: REQ Header		Open <u>D</u> ocumer <mark>⊂ Decision</mark> ? H	as the file been uploade	

Click on yes.

🛓 Oracle Applications - PSPCL									
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□ Include	Belated Documents	(Publish to Catalog	Dog	ument Catalog				

Open document have been enable. Click on open document if user want to see the uploaded document.

	Do you want to open or save File Upload.txt from erpappsdev.localdomain?	Open	Save	-	Cancel	×
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System will give the message. Either open the file or save the file.

2.9 Forwarding And Approving Purchase Requisition

4	Requisition S	ummary to	Requisitions	- 100004		-1000 C							ः
	Operating	g Unit <mark>Ch</mark>	ief Distributio	o <mark>n We</mark> :									
	Nu	ımber <mark>10</mark>	0004		Туре	Purch	ase Requi		Preparer	NISHT	HA MEHI	ΓA	
	Descr	iption			Status	Incom	plete		Total	INR			361.00
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	Num	Tuno	ltem			Rev	Catagony		Descripti			лом с	
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	Destinat	tion Type	Inventory						Source	Supplie	er 🛛		
	R	equester	NISHTHA M	IEHTA					Supplier				
	Org	anization	PSPCL AO	Valuation					Site				
		Location	Patiala						Contact				
	Sub	inventory							Phone				
	9	<u>)</u> utside Se	rvices		<u>C</u> ata	log		Di	stributions	6		Approv	e)

Click on appove.

- Navigate to the Approve Document window by selecting the Approve button. The requisition approval power is controlled as per the rules framed in the Requisition Hierarchy. The requisition preparer will only forward the document to the requisition approver for further action.
- Following are the approval actions available for the preparer and the approver. There are two different actions and two separate check boxes are available for these actions. If both approve and forward is to be applied then both check boxes have to be selected.
- Approve Approve the document. (Applicable when the approver and the preparer are the same person). The preparer will choose this option always to ensure that the document entered automatically gets forwarded to the immediate supervisor as defined in the approval hierarchy.
- Forward Forward the document to the approver.

(Note: If a requisition has to be approved by more than 1 person or if some action is needed to be performed by a different approver, then the preparer shall have to select both the Submit for Approval and the Forward option.)

• Approval Hierarchy and the forward to employee name will appear by default in the corresponding fields. If the default forward to is not appropriate then choose an appropriate employee name to whom the requisition must be forwarded.

- Enter notes in the Note field. This note will be appearing in the notification window of the 'Forward To' employee.
- Select the OK button.

2.10 Approving a requisition

This action will be taken by the Managers of the concerned purchasing authorities and others who are authorized to approve requisition and defined in the system accordingly. The designated approver will navigate to the notification summary screen to perform this action.

Encumbrance		
Reserve Unreserve	Unreserve Date	
Use GL Override Use Document (GL Date to Unreserve Accounting Date	
Submit for Approval	Forward From NISHTHA MEHTA	
Forward	Approval Path PSPCL_Approval_H	in an a bus

Now as per the hierarchy system will send the notification to concern person.

VIEWING REQUISITION STATUS:→

The status of the requisitions submitted for approval can be viewed from Requisition Summary form. Here all requisitions could have any one of these statuses i.e. Approved, In process, Pre-approved or Incomplete.

If the requester has sufficient approval authority the document status will be approved. Else it would show a status In Process. The document will be available with the next person in Requester's Hierarchy.

Navigation: Requisition > Requisition Summary

In Requisition Summary form, one can view requisition status using various sorting criteria. User has to select a criteria, from the various options available in the Find requisitions form. Screenshot of Requisition criteria form and Requisition summary form are given below:

🕉 Navigator - PSPCL Purcha	asing Super User				
Functions Document	s Processes				
Oracle Purchasing:Req	uisitions:Requisitio	on Summary	/		
Requester Workbench	·	-			
- Oracle Purchas	sina		Top Ten List		
Supplier Iten	-		1. Receipts		
Item Search	-		2. Receiving Trans	actions	
- Requisitions		_(🕞	3. Receiving Trans		
Requisition	n Summary		4. Purchase Order	Summary	
Requisition	ıs		5. Purchase Order	s	
+ Buyer Work	Center		6. Releases		
AutoCreate			7. PO Orders Sum	nmary Page	
+ Receiving					
+ RFQs and G					
+ Supply Base					
+ Managemen	t				
+ Items		-			
+ Accounting					
				-	
				<u>O</u> pen	
Find Requisitions					
Operating Unit	Chief MM				
Requisition Number	100007		Туре	•	
Preparer			Requester		
Buyer			Modified	*	
Reference Num			Import Source		
Line			Line Type		
Line Status Date Ranges	Sourcing Deliver To	Related Doci	uments 📃 🕑	Results	
Item, Rev	L			● Headers	
Category	L			CLines	
Description Supplier Item				○ <u>D</u> istributions	
Suppler terr					
		<u>C</u> lear	New	Find (<u>B</u>)	

Click on find

Requisition Headers Summary Image: Summary interview								
Number	Description	Approval Status	Creation Date	Currer				
100007		In Process	22-JUL-2021 18:43:59	INR 🔺				

The current status of the document including action taken on it can be viewed in the View Action History Window by the requester Tools menu.

Viewing Approval History:->

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Tool \rightarrow View Action history.

Purchase R	equisition - 100007				
	R	ev			
Seq	Date	Action	Performed By	Note	
2			GURBAX SINGH -		<u> </u>
1	22-JUL-2021 18:44	Submit	NISHTHA MEHTA		
ň	j				

Now approver will login by his /her user name & password & system generated notification will be received in to his notification.

Approving a requisition

This action will be taken by the approver of the concerned purchasing authorities and others who are authorized to approve requisition and defined in the system accordingly. The designated approver will navigate to the notification summary screen to perform this action.

Login screen of approver:->

Enterprise Search Contract Documents			Go Search Results Display Preference	Standard 🔽	-
Home					
Navigator	Worklist				
Personalize				Full	List (2)
	•••				
PSPCL Purchasing Super User	From $ riangleq$	Туре 🛆	Subject 🛆	Sent 💌	Due 🛆
	MEHTA, NISHTHA	Requisition	Purchase Requisition 100007 for MEHTA, NISHTHA (15000.00 INR) 22-Jul-2021	

Open the notification.

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Home	×			-			
ORACLE E	Business Suite				*	•	_ 2
Enterprise Search	contract Documents 🔽			Go	Search Results Display Preference	Standard	-
Home							
Navigator		Worklist					
	Personalize					Full	List (2)
		•••					
PSPCL Pure	chasing Super User	From $ riangleq$	Туре 🛆	Subject 🛆		Sent 💌	Due ∠
		MEHTA, NISHTHA	Requisition	Purchase Requisitio	on 100007 for MEHTA, NISHTHA (15000.00 INR)	22-Jul-2021	
		MEHTA, NISHTHA	Requisition	Purchase Requisition	Durchase Requisition 100007 for M (15000.00 INR)	EHTA, NISH	ГНА
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	http://erpappssit. pspcl.in :8000/O.	A_HTML/OA.jsp?OAFu	nc=FND_WFNTF_DETAIL	.S&Ntfld=17089	&addBreadCrumb=Y&retain	AM=Y&_ti=91	35914828	oa - C	Searc	h					0 11 7		
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^{ome} ≻ urcha	se Requisition 10000	7 for MEHTA, N	IISHTHA (1500	0.00 INR)		Approve	Approve	And Fo	orward	Forward	Reject	Reassign	Request	Informati	on		
From	MEHTA, NISHTHA			Total 1500	0.00 INR												
	-, GURBAX		Tax (Non Recov		INR (Total Tax: 0.00 INR)												
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ID	17089																
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e I	Description	Supplier	Cost Center	Unit	Quantity	Price (INR)		Amo	unt (INR) Charge	Account						
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Now the approver can take one of the below actions:

- Approve This action will be performed by choosing the Approve option. This will forward the documents automatically to the next higher authority in the approval process if the approver does not have adequate approval limits. Any other information can be entered in the Notes Field.
- Approve & Forward –This action will be performed by choosing the said option and entering the Forward To person name. If this option is chosen, the document will be forwarded to the specified person with the status of either In process or Pre-approved depending on the approval limits of the forwarder. Enter the notes to convey any information to the receiver.
- Forward In case the concerned manager does not have approval power or he wants this requisition to be approved by someone else, then he can forward the same to others using this option after selecting the name of the employee whom he is forwarding the requisition to.
- Reject This decision will return the requisition to the requisition preparer. Always enter the cause of rejection in the 'Note' field.
- Reassign In case this notification is to be assigned to be someone else, then using this option, one can reassign the notifications.
- Request Information Using this option, one can ask for more information either from the requestor or from someone else.

After any of the actions above, a notification would be sent back to the requisition creator.

Note:

- After approval, the requisition lines are transferred to the Requisition Pool for further action by the concerned buyer only when there is a buyer defined in the Purchase Requisition.
- In such a case, where a new item code is assigned, the buyer should modify the requisition line (using Core Purchasing > Auto create > Tool > Modify option) after the item is created and process the same for procurement/fulfillment. Intimation of such changes to requester is to be controlled manually.

Table Diagno	ostics										
Approval Se	equence										
Num	Name	Action	Action Date	Note							
2	GURBAX SINGH -	Pending									
1	NISHTHA MEHTA	Submitted	22-Jul-2021 18:43:00								
Table Diagno											
Open Doc Response	ument										
Response											
		✓									
	Note										

Requisition can be open by approver to see the further details by clicking on the open documents.

		★ 🌣 🔎 Logged in As SCM 🕜 😃
Enterprise Search Contract Documents	Go Search Results Display Preference	Standard 🔽
Home		
Navigator ^	Worklist	
Personalize	Full List (1)	
Application Diagnostics Contracts Terms Library Administrator Cost Management Cost Management - SLA Functional Administrator Functional Developer	From Type △ Subject △ Sent ▼ Due △ -, GURBAX Requisition Purchase Requisition 100007 has been approved (22-Jul-2021) Image: State of the st	

Login as the preparer & system will sent the notification in the preparer notification box.

Information This notification does not require a response. OK R OK R True holds a been approved OK R True notification does not require a response. OK R OK R True notification does not require a response. To MEHTA NISHTHA Non-Recoverable Tax: 0.00 INR Sent 22-Jul-2021 19:04:32 Attachments 0.00 INR (Total Tax: 0.00 INR) Sent 22-Jul-2021 19:04:32 Attachments 0.00 INR (Total Tax: 0.00 INR) Sent 22-Jul-2021 19:04:32 Attachments 0.00 INR (Total Tax: 0.00 INR) Sent 22-Jul-2021 19:04:32 Attachments 0.00 INR (Total Tax: 0.00 INR) Sent 22-Jul-2021 19:04:32 Attachments 0.00 INR (Total Tax: 0.00 INR) Colspan="5">Colspan= 5 Interpretor Lines Interpretor Inte	Reassign Request Information
OK R OK R From Source Colspan="6">- GURBAX To MEHTA, NISHTHA Sent 22-Jul-2021 19:04:32 ID 17000 Requisition Total Non-Recoverable Tax Attachments 1500:00 INR 0:00 INR (Total Tax: 0:00 INR) OF Colspan="6">OF R equisition Lines Encription ACSR 30mm2 (Weasel) Supplier Cost Center Unit Quantity Price (INR) Amount (INR) Charge Account 15:00:00:00:00:00:00:00:00:00:00:00:00:00	
From -, GURBAX Requisition Total To 15000.00 INR To MEHTA, NISHTHA Non-Recoverable Tax Attachments 0.00 INR (Total Tax: 0.00 INR) Sent 22-Jul-2021 19:04:32 ID Attachments 0.00 INR (Total Tax: 0.00 INR) equisition Lines •• D Supplier Cost Center Unit Quantity Price (INR) Amount (INR) Charge Account ACSR 30mm2 (Weasel) 10 MTR 1000 15 15000.00 11.10.000.000.900000.00	
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GURBAX SINGH - Approved 22-Jul-2021 19:04:30	
NISHTHA MEHTA Submitted 22-Jul-2021 18:44:31	
Table Diagnostics	
Table Diagnostics	

Preparer can open notification by clicking on it.

Status can be seen from the requisition summary.

Number	Description	Approval Status	Creation Date Curr
100007		Approved	22-JUL-2021 18:43:59 INR

2.11 Action History.

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			Manage Ta						
			India Tax D	etails					
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Find F	Requisition	s					_ 🗆 ×		
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	Requisition	Headers Su	mmary				_ 🗆 ×		
O	Purchase F	Requisition -	100007						
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			F	Rev					
	Seq	Date		Action	Performed By	Note	HT I		
	2	22-JUL	-2021 19:04	Approve	GURBAX SINGH -				
	1	22-JUL	-2021 18:44	Submit	NISHTHA MEHTA				
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2.12 Ammendment / Cancellation of Requisition

Overview: → Requisitions prepared by the Users can be amended either by the Users or by the Approver of the document if they deem it fit or by the Buyer where necessary.

Where the Users who created the requisition want to amend the same, they can do so any time until the Requisition is converted into a Purchase Order/Release. The approvers can amend only if the document is pending for approval with them. Buyers can amend the requisition only after the requisition is approved and awaiting further action in the Requisition Pool.

Similarly, only the preparer of the requisition (Owner of the document can do cancellation of requisitions) or any person defined as the Buyer & the requisitions are submitted for approval (status other than incomplete). The Owner can cancel such requisition only until the requisition is converted into a Purchase Order. Once converted, only the buyer can cancel the purchase Order and also cancel the underlying requisition. However, this cancellation by the Buyer would be only optional so that the buyer cancels the Requisition only when found necessary/relevant or when he has received a communication to this effect from the Requestor.

The pre-requisites for cancellations are process dependent and hence covered as part of the amendment process in the subsequent pages.

necessary/relevant or when he has received a communication to this effect from the Requestor.

2.13 Performing Amendment / Cancellation by Preparer / Approver

<u>Navigation</u>: Requisition > Requisition Summary

- Using the 'Requisitions Summary' in Oracle Purchasing, Users to query for the requisition that needs to be amended or cancelled.
- For the purpose of amendment: Select appropriate requisition & click on "Find" button. Only the Requisition with 'incomplete' or 'rejected' status can be opened. On opening of the requisition, necessary amendments could be performed on the requisition before submitting for approval by the preparer.
- For the purpose of Cancellation: Select appropriate requisition, Click on Tools Menu and Control Function. The Preparer can cancel only the requisitions that have a status of 'Approved' and 'Pre-approved'.

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		equisition He	eac v	/iew Purchase Orders /iew Sales Orders						
		Number		Control		wal Status			Creatio	n Date
		100007		Preferences		wed			22-JUL	-2021 18:43:
		100006	V	/iew <u>A</u> pproval through W	orkflow	pproved			22-JUL	-2021 02:01:
		100005		Change		wed			17-MA	Y-2021 10:51
		100004		/lanage Ta <u>x</u> ndia Tax Details		wed			17-MA	Y-2021 08:28
	100003		- Cobbi	oved			17-MA	Y-2021 08:00		
		100002			Appr	oved			13-MA	Y-2021 16:15
		100001			Appr	oved			13-MA	Y-2021 13:15
		100000			Appr	oved			13-MA	Y-2021 12:54
][
										
						Lines		New		Ope
						Clear	1	lew		Find (B)
l										

O Fin	d Requisitions	Control Document - 1	00005	×	Ì
	Requisition		Cancel Requisition Finally Close		
	100007 100006	Actions			5 1
	100005 100004				1:
L	100003 100002 100001	Reason			

- Where the requisition is pending for approval, the approver can amend the requisition during the Edit requisition function and then exercise his approval authority. The approver can review the requisition based on the links provided in the approval notification.
- Where the approver wants the amendments to be performed by the preparer, he/she can then reject the requisition with appropriate comments to inform the preparer of the required amendments.
- After withdrawing, the preparer can then make necessary amendments to the Requisition as desired and resubmit the same for approval.
- If a requisition needs to be cancelled, the Users can use the Cancel function to perform the same. As stated earlier, a requisition can not be cancelled if it has been placed on a Purchase Order/Release.

equisition Heade				
Number	Description	Approval Status	Creation Date	Currer
100005		Cancelled	17-MAY-2021 10:51:55	INR 🔺

Status of Requsition will become cancelled.

3 Spot/Standard Purchase Orders (Spot Purchase).

Standard purchase orders can be created either from the approved requisitions automatically or can be manually entered without any requisition reference. Also the product and price references from the approved quotations can be copied onto Purchase Orders. Following are the methods to be adopted for raising the standard purchase order.

3.1 Manual Entry of Purchase Orders

Navigation: Purchase Orders > Purchase Orders

- Purchase Orders can also be entered manually without any reference to a Requisition. This can be performed by directly navigating to the Purchase Orders form as per the above navigation.
- On both manually entered Purchase Orders and auto created Purchase Orders, price reference can be copied using the Catalog option.
- To enter the line details from the quotation, the buyer will press the catalog button and by giving the appropriate parameters, he will select the approved quotation from the 'Negotiated Sources' block. The details of the approved quotations will be copied to the PO lines.

Standard Purchase Order Header

 Purchasing will open the Standard Purchase Orders window when the user has completed Auto creation of a purchase order or when the creation form is opened manually. The upper part of the Purchase Orders window has the following display-only fields:

	Purchase Order Su	immary to Purchase Orders - 10003	80				_ 🗆 🖂 🗙
	Operating Unit	Chief MM	Created	22-JUL-2021 23:59:46			
	PO, Rev	100030	0 Type	Standard Purchase Order			
	Supplier	Pi Square Cables Pvt. Ltd.,	Site	H15, Bali Nagar	Contact		
	Ship-To	Patiala	Bill-To	Patiala	Currency	INR	
l	Buyer	NISHTHA MEHTA	Status	Incomplete	Total	15000.00	[]]
	Description						
	Lines	Price Reference Reference Doo	cuments Mor	re Agreement Ter	mporary Labor		
	· .	Price Reference Reference Do	cuments Mor	re Agreement Ter	mporary Labor		

- Created The system date is displayed as the creation date.
- Status Possible order status values are:
 - Incomplete The order has not been approved.
 - Approved The order has been approved. It can be printed and items can be received against it.
 - Requires Re approval The PO was approved and then made changes that require that the preparer process the document again for re approval. Items cannot be received against such PO.
 - In process The purchase order has been prepared and has been forwarded for approval, as the person who has submitted for approval is not having sufficient authority to approve.
 - Rejected- The purchase order has been rejected by the approving authority and has been sent back to the preparer.
- Total For standard and planned purchase orders, Purchasing displays the current total order amount of the lines on the purchase order.
- Currency Purchasing displays the functional currency. This is overridden by supplier currency information. To change the currency of the Purchase Order, choose the Currency Button in the form and enter the currency details.

- Purchase order number is auto created. Please note that at the beginning of the new calendar year, the purchasing setup needs to be modified to have the new purchase document sequences in place. The reference of the Calendar year is captured in the document numbers for Requisitions, Purchase Orders, RFQ's and Quotations. Refer the setup document for detailed information.
- Enter the name of the Supplier for this purchase order. To approve a purchase order, supplier name & supplier site name must be provided.
- <u>Note:</u> The supplier cannot be changed once the purchase order is approved. The purchase order becomes a legal document when it is approved. To change the supplier after a purchase order has been approved, the existing purchase order must be cancelled and a new one created for the other supplier.
- Enter the supplier site. If the selected supplier has only one site, it is defaulted into this field. Before approving a purchase order, supplier site must be provided.
- Optionally enter the name of the Contact at the supplier site. If the selected supplier has only one contact name, it is defaulted into this field.
- Enter the Ship To and Bill To locations for the Purchase Order. The Bill-To Location will be the Accounts Payable Dept and the Ship To location will be the location where the goods are to be delivered. In case, if the goods are to be delivered to a Freight Forwarder, select the final destination where the goods are to be forwarded by the Freight Forwarder in the Ship To Field. The Freight Forwarder information will be captured under the Freight Carrier Field in the Terms Region.
- The buyer name will default.
- The brief title of the PO will have to be entered in the 'Description' field, This is optional field.

Lines	Price I	Reference	Reference	Document	s More	Agreement	Temporary Labor		
Num	Туре	ltem		Rev	Job	Category	Description	UOM	Quantity
1	Goods	ET1100	046			ACSR.ACSR	ACSR 30mm2 (We	ease MTR	1000

Standard PO Lines

- Select the items alternative region in the Purchase Orders window.
- Purchase line number defaults from auto create action or the quotation if the Purchase Order Lines are copied using the catalog. Purchasing displays the next sequential line number for the next line available. The preparer can accept this number or enter any line number that does not already exist. This number is used for all alternative regions in the Purchase Orders window.
- Line Type defaults from requisition or the quotation or can be manually chosen. Select Goods for procuring Items and services, which have been already coded in the Item Master. Also for text items, either goods or services can be selected on a case-by-case basis.
- The Item / Services to be purchased are defaulted from the requisition/quotation. The associated purchasing category, item description, unit of measure associated with the item will default.
- In case of services / one time item purchases which does not require an item code to be defined, the
 item code field should be left blank and only the Category and description field to be filled up or copied
 from Requisition/Quotation. Any valid category combination can be chosen by the Buyer to identify the
 nature of Goods / Services being procured.
- Enter the total quantity to be purchased. The Price will have to be copied from the Quotation.
- To refer to the quotation and price, <u>catalog button</u> has to be pressed and the relevant active and approved quotation has to be queried. On availability of approved and active quotation it has to be selected on to the PO lines.

- Enter either the Promised date or the Need by date. Where the Purchase Order is auto created from the requisition the Need By date will default from the requisition line. In case the Purchase Order is copied from the quotation or manually entered, these dates shall have to be entered.
- Use the MORE regions to enter any instruction to the supplier for the line item. This will have to be entered in the NOTE TO SUPPLIER field.

Lines	Price Re	ference Re	ference Documen	ts More	Agreement	Temporary Labor	
Num	UOM	Quantity	Price	Promised	Need-By	Supplier Item	Supplier Config
1 V	/ease MTR	1000	15		28-JUL-2021 00:00		

Scroll the line details to see price/need by date, promise date or same can be consider to be CDP dates.

Terms

Navigate to the purchase order details window by selecting the Terms button in the purchase orders window.

Terms and Conditions - 100030	
Terms Encumbrance	
Terms Payment Net Freight Carrier FOB Pay On	t 30 ··· Confirming Order Firm Acceptance Required None By Supply Agreement
Supplier Note Receiver Note Agreement Controls	
Minim	- Amount Limit
- Contract Terms	
Author Contract Terms	Contract Template
Manage Contract Documents	View Contract Terms Update Deliverable Status

- Enter the Payment terms for the purchase order.
- Enter the Freight terms for the purchase order.
- Select the Freight Forwarder information in the Freight Carrier field. Please note that One Purchase Order can have only one Freight Forwarder.
- Enter the FOB point for the purchase order. This is the point when the responsibility of the Supplier for the goods ends.
- Firm field is not relevant here as the same is used for manufacturing planning control.
- Agreement Control region indicates the effective dates and the amount limit for the PO and this will appear grayed out in standard purchase order.

- Enter a Supplier Note and a Receiver Note. Any special instructions to the Supplier in connection with the Purchase Order can be entered in the Supplier Note field. Enter any special instructions to the Receiver in the Note to Receiver field.
- The user may provide the header and the line level attachments for approver, supplier, receiver and the Payables Section.
- Save the work.

For applying terms & condition click on author Contract terms

Ferms and Conditions - 1000	30		_ 🗆
Terms Encumbrar	ice		
	yment Net 30 ···	□ <u>C</u> onfirming Order □ Firm	
	Carrier FOB Yay On	Acceptance Required By	None 🗸
Supplier Note Receiver Note		J	
Agreement Controls Effective	Amount Limit Minimum Release Price Update Tolerance	%	
Contract Terms	erms Con	tract Template	p <u>d</u> ate Deliverable Status

System will open the web page in the back ground.

					Update Contract De	etails Up	load Co
Authoring Party None Contract Administrator Legal Contact	Contract Sou Contract Temp			א מ בר אַר אַ	ly Template		
uses Deliverables							
Title	No	n-Standard	Mandatory	Contract Expert	Select Alternate	Update	Delete
No Contract Terms are available for this document, Please click "Apply Template" to add Contract Terms.							

• Select the contract template that you created in Contract Terms Library administrator responsibility. Click on the torch button next to apply template button.

) 🥔 http://erpa	appssit. pspcl.in :8000/0/	A_HTML/RF.jsp?function	_id=21335&resp_	id=50745&resp_app	l_id=7000&secu
Home		🧉 erpappss	it.pspcl.in	🧉 Oracle E-Bus	iness Suite R12	🧉 Purchasing
	ORACL	.e [.]				
Stan	dard Purc	hase Order 10	0030, 0: Contra	ct Terms		
			Authoring Party Non	e		
		Contra	ct Administrator			
Searc	ch and Select	t: Contract Templa	te			
Sear	- h					
To fin	d your item, sele	ect a filter item in the pu	Ildown list and enter a v	alue in the text fie	eld, then select the "	Go" button.
Searcl	h By Name	✓ %	Go			
Resu	llts					
	Quick Select	Name	Description	Instructions	Contract Expert	Enabled 🗠
\circ		Terms & Conditions	Terms & Conditions			
	Quick S	elect				
About	this Page Tabl	e Diagnostics				

- Now select the Contract template which you want to attach against this spot purchase.
- Expend the contract terms to see further details. Select **Update Contract Details, Click on the pencil icon** and click on go.

	arur	Purchase Order 100030, 0: Contract Terms						
	Auth	oring Party Internal	Contra	ct Source Structure	ad Terms	Actions		
Cont		ministrator	Contract Template Terms & Conditions					
	Leg	gal Contact						
Clause	es De	sliverables						
		: Add Clause Add Section Move Delete Renumber <table-cell> 🔅 🗸 🛙</table-cell>	•					
Expar	nd All C	Collapse All						
÷								
	Focus	Title	Non-Standard	Mandatory	Contract Expert	Select A		
		Contract Terms						
	¢	PRICE VARIATION FORMULA						
		PRICE VARIATION FORMULA						
	(TERMS of PAYMENT						
	¢	Making						
	÷	PENALTY/DAMAGE FOR DELAY IN DELIVERY						

Select the clause & then click on pencil icon.

Indicates require	d field					
* Clause Title						
Section	PRICE VARIATION FORMULA				Mandatory	
Section	Include By Reference				Non-Standard	
Display Name	PRICE VARIATION FORMULA				Protect Text	
Туре	Other			Instructions		
Description	outor			matuctiona		
Description						
ext				Clause Variables		
Change to Plain T		Preview Exp	ort			
1. The pr	ice variation per pole shallbe as under for 10.		ort	•••		
	ice variation per pole shallbe as under for 10.		ort	••• Details Variable Name		
1. The pr	ice variation per pole shallbe as under for 10. oles:-	97 mtr long	^			
1. The property processing the processing of the	ice variation per pole shallbe as under for 10.	97 mtr long MT in the price	^	Details Variable Name		
1. The provide the provided provided the provided provide	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per	97 mtr long MT in the price cement price,	^	Details Variable Name		
1. The pr PCC p of HT rate of of 10.9	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per wire and Rs.10/- per MTincrease/decrease in 'pole shall increase/decrease byRs.1.65 and R 97 m length for HT wire and cementrespective	97 mtr long MT in the price cement price, ts.2.45 per pole ely. This price	^	Details Variable Name This clause does not contain any Variables		
1. The pr PCC p of HT rate of of 10.9 variatio	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per wire and Rs.10/- per MTincrease/decrease in pole shall increase/decrease byRs.1.65 and R 97 m length for HT wire and cementrespective on shall be worked out on account of rawmate	97 mtr long MT in the price cement price, (s.2.45 per pole ely. This price erial i.e. cement	^	Details Variable Name This clause does not contain any Variables		
1. The pr PCC p of HT rate of of 10.9 variati & HT	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per wire and Rs.10/- per MTincrease/decrease in 'pole shall increase/decrease byRs.1.65 and R 97 m length for HT wire and cementrespective on shall be worked out on account of rawmate wire only. No increase/decrease in price of po	97 mtr long MT in the price cement price, ts.2.45 per pole ely. This price erial i.e. cement oleshall be	^	Details Variable Name This clause does not contain any Variables		
1. The pr: PCC p of HT rate of of 10.9 variatic & HT allowe	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per wire and Rs.10/- per MTincrease/decrease in pole shall increase/decrease byRs.1.65 and R 07 m length for HT wire and cementrespective on shall be worked out on account of rawmat wire only. No increase/decrease in price of pc d if increase/decrease is less than 50/- per MT	97 mtr long MT in the price cement price, ts.2.45 per pole ely. This price erial i.e. cement oleshall be	^	Details Variable Name This clause does not contain any Variables		
1. The pr: PCC p of HT rate of of 10.9 variatic & HT allowe	ice variation per pole shallbe as under for 10. oles:- For everyincrease/decrease of Rs.50/- per wire and Rs.10/- per MTincrease/decrease in 'pole shall increase/decrease byRs.1.65 and R 97 m length for HT wire and cementrespective on shall be worked out on account of rawmate wire only. No increase/decrease in price of po	97 mtr long MT in the price cement price, ts.2.45 per pole ely. This price erial i.e. cement oleshall be	^	Details Variable Name This clause does not contain any Variables		

Update the details as per requirement & click on save/Apply.

Terms Payment Net 30 Confirming Order Freight Freight	ns and Conditions - 100030	
Payment Net 30 Freight Firm Carrier Acceptance Required FOB By Pay On Supply Agreement Supplier Note Receiver Note Agreement Controls Effective Price Update Tolerance Minimum Release Price Update Tolerance % Contract Terms Author Contract Terms Contract Terms Contract Terms	Terms Encumbrance	
FOB Pay On Supplier Note Receiver Note Agreement Controls Effective Amount Limit Minimum Release Price Update Tolerance % Contract Terms Author Contract Terms Contract Template Terms & Conditions	Payment Net 30	Firm
Receiver Note Agreement Controls Effective Amount Limit Minimum Release Price Update Tolerance % Contract Terms Author Contract Terms Contract Terms & Conditions	FOB	By
Effective		
Minimum Release Price Update Tolerance % Contract Terms Author Contract Terms Contract Template Terms & Conditions		
Author Contract Terms Contract Template Terms & Conditions	Minimum Release	%
	Contract Terms	
Manage Contract Documents View Contract Terms Update Deliverable Status	Author Contract Terms Contr	ract Template Terms & Conditions
	Manage Contract Documents View Cont	tract Terms Update Deliverable Status

Here system will now reflect the contract template which has been applied. If contract terms has to be viewed then we need to click on view contact.

PO Shipments.

- Use the Shipments window to enter multiple shipments for standard and planned purchase order lines and to edit shipments that Purchasing automatically created for you in the auto created screen. A purchase order shipment specifies the quantity, ship-to organization and location, and date the supplier should deliver the items on a purchase order line.
- For entering the purchase order shipment information, navigate to the Shipments window by selecting the Shipments button in the Purchase Orders window.
- The first alternative region in the Shipments window is the Shipments alternative region. In addition to the enterable fields discussed in the following steps, this region displays the UOM, the Charge Account, the line Amount and a check box to indicate whether funds have been reserved.

Purchase Order Su Shipments - 1 Shipments	(ars - 100	JU30	(
Num	Org PAO	Ship-To Patiala		Quantity 1000	Promised Date	Need-By 28-JUL-2021 00:00	Original Promise	
Line Num 1		Item ET1100			SR 30mm2 (Wease <u>R</u> eceiving Contro		Distributions	

- If a new shipment line is entered, Purchasing displays the next sequential line number available. Enter the ship-to Organization.
- Note: The organization cannot be updated once the work has been saved if the shipment has distributions. To modify, you need to delete the shipment row, save the record and then enter a fresh shipment line.
- Enter the Ship-To location for the shipment.
- Enter the Quantity for the shipment. This value must be greater than zero. The quantity on the Shipment line defaults from the corresponding Purchase Order Line. If this quantity is decreased, Purchasing automatically defaults the quantity ordered of the next line to the total quantity that have not yet been placed on a shipment line. The UOM is displayed next to the Quantity.
- Enter the Promised by date when the requestor needs the item. This date is printed on the purchase order. The default is from the Purchase Order Preferences window.
- Save the work.

To Display And Enter More Shipment Information

Num	Receipt Close Tolerance(%)	Invoice Close Tolerance (%)	Match Approval Level	Accru Invoice Match Option	ue at Receipt
1	0	0	4-Way) 💌 🗖 🖻
			·	- -	
			·		
			Ţ	- -	
			·	- -	
	•		9		Þ
ine Num	1 Item ET1	100046 AC	SR 30mm2 (Weasel)		

- Select the More alternative region in the Purchase Order Shipments window.
- Enter the Receipt Close Tolerance percent for the shipments. Purchasing automatically closes a shipment for receiving if it is within the receiving closing tolerance at the receiving close point. The receiving close point is set in the Purchasing Options window.
- Enter the Invoice Close Tolerance percent for the shipments. Purchasing automatically closes a shipment for invoicing if it is within the invoicing closing tolerance at billing, when Payables matches invoices to purchase orders.
- Available Invoice Matching options:
- Two-Way: Purchase order and invoice quantities must match within tolerance. All service items and Intangible items will have to follow this matching level.
- Three-Way: Purchase order, receipt and invoice quantities must match within tolerance.
- Four-Way: Purchase order, receipt, accepted and invoice quantities must match within tolerance.
- Select Accrue on Receipt to indicate that the items on this purchase order line accrue on receipt. Both expense and Inventory items are always accrued on receipt.
- Save the work.

To Display Status Information

Shipments - 1	100030						
Shipments	More	Status					
			Quantity				1
Num	Status		Ordered	Received	Cancelled	Billed	Finar
1			1000	0	0	0	
	-						
					l		
	•						
L							

- Select the Status alternative region in the Purchase Order Shipments window.
- For each shipment, Purchasing displays the Status and the Quantity Ordered, Received, Cancelled, and Billed.

To Enter Receiving Control Information.

Receiving Controls	
Receipt Date	
Days Early	5
Days Late	5
Action	None 👻
Last Accept Date	
Over Receipt Tolerance	
Tolerance	5 %
Action	None 👻
Miscellaneous	
Allow Substitute Receipts	
Receipt Routing	Inspection Require
Enforce Ship To	None
<u>O</u> K	Cancel

- Select the Receiving Controls button to open the Receiving Controls window. The receiving controls defaults from the item for an Item based PO line's shipments. In case the item is either one time (text item) or a service item, the receiving controls will default from the PO options.
- The receiving control of 'Warning' will only provide the warning to the user but he would be able to undertake the required action irrespective of violation of the 'Date' or the 'Quantity' type controls. In case of 'Reject' control, the user will not be able to perform any action if either of the mentioned controls is being violated.

Distributio	ns - 100030						
							l
Destinatio	n More	Project					
Num	Туре	Requester	Deliver-To	Subinventory	Quantity	PO []
1	Inventory	NISHTHA MEHTA	Patiala		1000	11.	
ñ							
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PO Acco	unt Descriptions		Destin	ation Account Des	criptions		
Char	e PSPCL.PSP	PCL Chief MM.No Divisio	on.No S Ch	arge			
Accru	-	PCL Chief MM.No Divisio		ance			_
Budg	et						
Varian	-	PCL Chief MM.No Divisio	In No. 6				
variano	Ce FORCE.FO	-CL Chief Wiwi.No Divisio	JI.10				
Lines And	d Shipment Deta	ils					
Line Nu	m 1	Shipment Num 1	Org F	PAO S	hip-To Patiala		
lte	m ET1100046		Im2 (Weasel)				—
ite		[(*******)				
					Outside O		
					Outside Se	vices	

To Enter Purchase Order Distribution Information

- Use the purchase order Distributions window to enter distribution information for purchase order shipments and to view distributions that Purchasing has automatically created. Multiple distributions can be entered per shipment line.
- Navigate to the Distributions window by selecting the Distributions button in the Shipments window. The Shipments window is accessed from the Purchase Orders window.
- Enter the line Number for the distribution line.
- The destination type determines the final destination of the purchased items. Choose one of the following options:
- Expense The goods are delivered to the requestor at an expense location. The destination subinventory is not applicable. This will be used for all non-stock items and services and any other item, which need not be tracked in Inventory against this Purchase Order. <u>All Capital items should have the destination type set to EXPENSE</u>.
- Inventory The goods are received into inventory upon delivery. Enter the Requestor and Deliver To location for this distribution. If the destination type is Inventory, the sub inventory also has to be

entered. This will be used for stock items and other items, which needs to be stored in Inventory before being issued for consumption.

- Enter the Quantity of the purchase order shipment that is to be charged to the Accounting Flex field. The default value comes from the quantity entered in the Shipments window. If the default quantity is decreased, Purchasing automatically defaults on the next distribution line the total quantity not yet assigned to a distribution line.
- Enter the Charge Account. When navigating to this field or when the document is saved after entering the Shipment information, the system builds the charge account. Purchasing uses the Account Generator function to automatically create the following accounts for each distribution:
 - Charge: the account to charge for the cost of this item
 - Accrual: the AP accrual account
 - Variance: the invoice price variance account
 - Budget: the encumbrance budget account
- The account code built by the system can be changed if the destination type is Expense. The other codes are automatically built and not changeable.
- The Reserved check box indicates whether the funds have been successfully reserved for this purchase order distribution. The distribution is reserved when the purchase order is approved. Any purchase order distribution that has already been encumbered cannot be changed.

To Enter Distribution Detail Information

estinati	on More I	Project					
	Requisition			Onlin	e		
Num	Requesting Org	Number	Line		Rate Date	Rate	PO Accrual Acco [
1	Chief MM	100007	1		22-JUL-2021		11.10.000.000.900
í –							i i -
í							
i	, <u> </u>			-			

- Select the More alternative region.
- The requisition line from where this PO is auto created would be shown here. If the PO is not auto created, then the requisition number can be entered here (please note that the requisition number can't be selected from LOV).
- The *online* check box indicates whether this distribution is part of an on-line requisition. If so, Purchasing displays the requisition number and line number.
- Purchasing displays the budget account, accrual account, and variance account numbers supplied by Account Generator.

Currency Information

- Use the currency window to enter and change currency information for purchase orders.
- For purchase orders, currency information can be changed until the purchase order is approved or encumbered. Note that changing the purchase order supplier to one that uses a different currency overrides any information entered in this region.

nents	Currency - 10	0030	× pora
P	Rate Type Rate Date	NR 22-JUL-2021	r Iter
	Rate		
	Done	Cancel	

Apply attachment for spot purchase if any. Attachement process remain same as explained above.

Forwarding and Approving Standard Purchase Order:→

- Navigate to the Approve Document window by selecting the Approve button. The buyer will select the Submit for Approval checkbox to automatically approve the document subject to his own approval limits and automatically forward the documents to the immediate superior for approval in case of insufficient approval limits.
- In case of the immediate approver not on duty, the Buyer or the forwarder shall have to select the Forward To option and choose the name of the person to whom the document has to be forwarded to in the appropriate field.

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				Actions Windo									
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Purchase (Order Su	mmary to	Purchase	Orders - 10003	0								
Operatir	ng Unit	Chief M	M			Created	22-JI	UL-2021 23:59:46	i i				
P	O, Rev	100030			0	Туре	Stan	dard Purchase O	rder				
s	upplier	Pi Squ	are Cables	Pvt. Ltd.,		Site	H15,	Bali Nagar		Conta			
S	hip-To	Patiala				Bill-To	Patia	ala			sy INR		
	Buyer	NISHTH	IA MEHTA			Status	Incor	mplete		Tot	al 15000.00		[]]
Desc	ription												
Lines		Price Re	ference	Reference Doc	uments	Mo	re	Agreeme	nt Te	emporary Labor			
Num	ı	UOM	Quantity	Price	Pro	mised		Need-By	Supp	lier Item	Supplier Config ID		
1	Wea	se MTR	1000	15				28-JUL-2021 00:	00][]		
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lter	n ET1	100046		ACSR 30mm	n2 (Weas	el)							
					(e	
				(<u>C</u> a	atalog		Curr	ency	Ter	ms	Shipments	Approv	/e)
L													

Click on Approve.

	1.1		
	Unrese	erve Date	
GL Date to Unrea	serve Account	ting Date	
	Approval Path Forward To		
	Forward To		
	3L Date to Unres	Forward From Approval Path	Forward From Approval Path

Select the reserve. A PO creates an obligation to pay referred to as an encumbrance. These entries are sent to the General Ledger (GL) and. An encumbrance is simply money set aside for planned purchases.



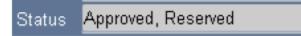
Click on Approve.& approval process remain same as mention the PR approval.

The approvers will receive the documents electronically in their Notification Box. (Navigation: Purchasing Responsibility > Notification Summary).

The various actions that could be performed against each of the Notification which is pending for approval are:

- Forward Forward the document to another employee for approval without attempting to approve it. In such an option, select the Employee Name of the employee to whom the document is to be forwarded.
- Reject Reject the document to indicate that it is not to be approved because of any reason. Purchasing returns the document to its owner for modification and resubmission to the approval process if appropriate. Please note that if an approver wants to send the purchase order / other purchasing documents back to the buyer; he has to exercise the option of 'Reject' rather than the option of forward. Only subsequent to the 'Reject' option, the buyer will be able to make changes in the P.O.
- Approve This action will be undertaken to approve the standard P.O subject to the approval limits. In case of insufficient approval limits, the document will be automatically forwarded to the next immediate position in the Purchasing Approval Hierarchy.

- Approve and Forward This option has to be used if the document has to be forwarded to another employee in the same hierarchy whose concurrence needs to be obtained for the procurement or whose opinion is sought. If this option is chosen, enter the employee name whose concurrence is sought in the Forward To field. The document gets forwarded with 'PRE-APPROVED' or 'IN PROCESS' status depending on the approval limit of the forwarder. In case sufficient approval limits exists for the person taking action, status will become pre-approved & in case of insufficient approval limit, the status will be In process.
- Note: Once the PO is approved and if any changes are made to that Approved PO with respect to Item, Qty, Price, and date it will revise the document and requires re-approval will follow the same approval process like a new PO
- Once the purchase order has been approved, you will see that it is in Approved, Reserved status.



VIEWING PURCHASE ORDER STATUS

The status of the purchase orders submitted for approval can be viewed from Purchase Order Summary form. If the approver has sufficient approval authority the document status will be approved. Else it would show a status In Process. The document will be available with the next person in the approver's hierarchy.

4 PURCHASE ORDER STATUS IN PURCHASE ORDER SUMMARY.

Navigation: Purchase Order > Purchase Order Summary (

This query would open 'Purchase Order Summary India form wherein the details of all the spot PO with tax details can be seen.

In Purchase Order Summary form of base apps, one can view Purchase Order status using various sorting criteria. User has to select a criteria from the various options available in the 'Find Purchase Order's form.

🚳 Nav	igator - F	PSPCL Purchasi	ng Super User				
Fu	nctions	Documents	Processes				
Ora	acle Pur	chasing:Purcha	se Orders:Purc	hase	Order	Summary	
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		Purchase Order	5			3. Receiving Transaction Summary	
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One can directly query to PO Headers / Lines / Shipments / Distributions depending on the query criteria. On pressing the 'Find' button, the relevant window opens.

Find Purchase Orders			_ 🗆 ×	
Operating Unit	Chief MM			
Number		Туре		
Release		Currency	Document Types	×
Supplier		Site		
Ship-To Org			Find %	
Bill-To		Line Type	Document Type	Operating
Ship-To		Buyer	Blanket Purchase Agreement	Chief MM
Line Shipment			Contract Purchase Agreement Planned Purchase Order Standard Purchase Order Blanket Release Scheduled Release	Chief MM Chief MM Chief MM Chief MM Chief MM
			Scheduled Release	Chief MM

Select the type as per requirement. Enter the po number, Buyer name, Click on find.

Find Purchase Orders	
Operating Unit	Chief MM
Number	Type Standard Purchase Orde
Release	Currency
Supplier	Site
Ship-To Org	Show External Locations
Bill-To	Line Type
Ship-To	Buyer NISHTHA MEHTA
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	□ With Contract Ter <u>m</u> s
Line Date Ranges Status R Item, Rev Job Category Description Supplier Item	Lelated Documents Deliver To Accounting Projects Results ····································
VMI Consigned Clear	New Release (B) New PO Find (J)

Click on find.

Number	Release	Rev	Description	Туре	Global	Enable All Sites
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100029		1		Standard Purch		
100028		0		Standard Purch		
100027		0		Standard Purch		
100024		0		Standard Purch		
100022		0		Standard Purch		
100021		0		Standard Purch		
100020		0		Standard Purch		
100019		0		Standard Purch		
100015		0		Standard Purch		
∢	- 2000000	,				

Note: \rightarrow In progress po can not be open & action can be see as per mantion in the PR.

FOLDER WINDOW

The window thus opened is a 'Folder Window' i.e. the fields in this window can be rearranged to suit one's needs in order not to scroll right to see the details. Note the 2 statuses – Close & Cancelled.

- Closure status indicates whether the Purchase Order is closed for receiving & invoicing. If it is closed, then there cannot be any receipts made or invoices booked against this PO.
- Cancelled status indicates whether the PO has been cancelled in the header level.

5 VIEW ACTION HISTORY

Navigation: From Purchase Order Summary > (T) Inquire > View Action History

The View Action History would show the details regarding the purchase users right from the creator to the final approver and date on which a particular action has been done on the PO.

If in case a PO is not yet approved, then it can be known that on whose notifications the In Process PO is lying. Also note that each of these transactions are date tracked.

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Standard Purchase Order - 100029

Seq	Date		Action	Performed By	Note
6	31-MAY-2021 09:4	1	Approve	GURBAX SINGH -	
5	31-MAY-2021 09:4	1	Forward	NISHTHA MEHTA	
4	31-MAY-2021 09:4	1	Submit	NISHTHA MEHTA	
3	31-MAY-2021 08:4	0	Approve	GURBAX SINGH -	
2	31-MAY-2021 08:4	0	Forward	NISHTHA MEHTA	
1	31-MAY-2021 08:4	0	Submit	NISHTHA MEHTA	

VIEW PO SUMMARY LINES

Navigation: From Purchase Order Headers Summary > (B) Lines

Here the details of the PO lines can be seen. In line level also, there are 2 statuses – Cancelled & Closure, which are explained above. Also note that this is also a folder window.

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	100015		0		Standard Purch			G
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VIEW PO SHIPMENTS SUMMARY

Purchasing Org	Number	Line	ltem	Item Rev	Category	Description
Chief MM	100029	1	Expense		HT Meter.BI D	Expense
Chief MM	100029	2	Services		HT Meter.BI D	Services
	[
	[
	[

Navigation: From Purchase Order Lines Summary > (B) Shipments

Click on shipment.

Here the details regarding quantities - due, received, accepted, rejected, billed & cancelled can be seen.

Purchase Ord	er Shipments				
2					
Date	Expires On	Quantity	Quantity Due	Quantity Received	Quantity Accepte
		1	1	0	0

6 COPYING PO.

Open the approved PO.

urchase Orc	ler Sum	nmary to Purc	hase Orde	rs - 10002	22										_
Operating	Unit 🛛	Chief MM				Create	d 17-MAY	-2021 11:21:13							
PO,	Rev	100022			0	Тур	e Standar	d Purchase Order							
Sup	plier 🛛	Anvil Cable P	vt. Ltd, Ko	olkatta]	Sit	e SARAIK	ELA		Contact	Cab	le, Anvil			
Shi	p-To	Shakti Vihar	AO Valua	tion]	Bill-T	o Shakti V	ihar AO Valuation		Currency	INR				
B	Jyer 🛛	VISHTHA ME	EHTA]	Statu	s Approve	d		Total	237	00.00			[
Descrip	tion														
Lines	P	rice Referen	ce Refe	rence Do	cument	ts I	More	Agreement	Tem	porary Labor					
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Num	Type Good	e Iter	m 8200054		Rev	JOD		Category ACSR.Gss_Gms		cription Wire	KG	Quantity 200	Price 140	- [-]	
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Click on tools \rightarrow Copy document.

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System will open another window click on approve.

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From			
FIOM	Document Type	Standard Purchase Order	
	Document Number	100022	
	Decement Humber		
_То			
	Note	Chandrad Durchase Order	ì
	Note		2
		0-15555: Purchase order 100031 has been created.	
		<u>OK</u>	
	·	○ <u>C</u> opy Latest Clauses from Library	
		○ Copy Current Clauses from Document	
		Do Not Copy Contract Terms	
		OK Cancel	

System has already po number of 100031.Quary po number 100031 & po status will be in incomplete status.

7 PURCHASE ORDER CANCELLATION.

This Procedure covers Cancelling of Purchase orders.

Note1: The PO with following status cannot be cancelled

- 1. Incomplete
- 2. In process
- 3. Approved and closed

Note2: The PO for which the full Qty is received can also be not cancelled.

Navigation is as follows:

Click on Purchase Order Summary option. Tool→Control Action.

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	100030	Communicate			Standard Purch			
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Control Document -	100029			×
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Actions	Close for Receiving			
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Select the control actions & provide the valid reason & click on ok.

System gives caution message.

Ocontrol Document - 1	00029	×
Actions	Cancel PO Close Close for Invoice Close for Receiving Finally Close Freeze	e
	Cancel <u>R</u> equisition	
Reason		
Note to Supplier		
	Once the document is Cancelled, it cannot be undone. Do you want to proceed? ○K Cancel OK Cancel	en

0	ind Pu	rchase Of	Ocontrol Document - 1	100029	
	<mark>o</mark> pi	·		Cancel PO	
	_	Number		Close Close for Invoice	
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Γ		100022		Control Action is according to the Disconcernet	
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				(<u>ok</u>)	
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Cancelled check box has been checked.

8 PLANNED PURCHASE ORDER/ QUANTITY BASE AGGREMENT PO.

A planned purchase order is a long-term agreement committing to buy items or services from a single source. You must specify tentative delivery schedules and all details for goods or services that you want to buy, including charge account, quantities and estimated cost.

You can issue scheduled releases against a planned purchase order to place the actual orders. If you use encumbrance accounting, you can use the planned purchase order to reserve funds for long term agreements.

You can also change the accounting distributions on each release and the system will reverse the encumbrance for the planned purchase order and create a new encumbrance for the release.

Navigation: Purchase Orders \rightarrow Purchase Orders

Select type as 'Planned Purchase Order' & fill other header details. Enter Item, Quantity, Price and Promised / Need By date.

Operating	Unit	Chief MM		Created	23-111-20	21 02:58:39						
PO.		100032				Purchase Ord						
			- DA IAI				er					
Sup		Pi Square Cabl	es Pvt. Ltd.,	Site		Nagar		Contact				
	p-To	Patiala		Bill-To					INR			
	1 - C	NISHTHA MEHT		Status	Incomplet	e		Total	300.00			[
Descrip	tion	Enter tender nur	mber									
	_											
Lines		Price Reference	Reference Doo	cuments Mo	ore	Agreement	Ten	nporary Labor				
Num	ob		Category	Description	UON	1 Quantity	Price	Promised		Need-By	11	
1]	ACSR.ACSR	ACSR 30mm2 (V	Vease MTR	15	20	05-AUG-20	21 00:00			-
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ltem		100046	ACSR 30mn									
Item		100046			Currency		Term		hipments		Approve	

Enter Header, Line, Shipment, Distribution, Receivig control, Other details same as the spot purchase.

Click on terms to set the aggrement amount limit.Terms limit defined as per BPA/rate contract.

OPurchase Order Sun	🗢 Terms and Conditions - 100032 📃 🗖 🕱
Operating Unit	
PO, Rev	Terms Encumbrance
Supplier	Terms
Ship-To	Payment Net 30
Buyer 1	Freight Freight
Description	Carrier Acceptance Required None
	FOB By
Lines F	Pay On Supply Agreement
Num ob 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Supplier Note Receiver Note Agreement Controls Effective 23-JUL-2021 - 23-JUL-2022 Amount Limit 15000000.00
	Minimum Release 1200.00
	Price Update Tolerance %
Item ET11	

Approve the po as per spot./rate contract.

IR (Inspection Process) --

Navigation - PSPCL Inspection -> PSPCL Inspection

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To create a New Inspection Request Click on New ,

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Fill The details -

Header Section

PO Number, IR Number, Attach the attachment, Inspection Place, IR Date, Sample status, Receiving of Request Date, Date of Readiness.

Line section Fill in the details

Elle Edit View Poldsr Tools Window Help CORACL Ispection Inspection Organization Name PO Number Organization Supplier Name Jalandhar Spun Pipe Co. Js IR Number Receiving Of Request Date 12:07:2022 Supplier Address Near Khalsa Petrol Pump Date of Readiness 26:07:2022 Supplier Contact Person Supplier Contact No. Note1 Note2 Remarks Mail Mail Status Employee Assigned-1 Assigned Emp ID-2 Employee Assigned-2 Assigned Emp ID-2 Conspletion Phone No-1 Status Tentative Date of Completion Completion Employee Assigned-2 Assigned Emp ID-2 Phone No-1 Status Employee Assigned-3 Assigned Emp ID-3 Other Employee Remarks Remarks Remarks Remarks Remarks Remarks Remarks Remarks Reassign Mail Dispatch Instruction Inspection Type Item De
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Start Date and Time -

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And send the mail of start of Inspection.

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Email Address2 <mark>cpopseb@yahoo.com</mark>	Near Khalsa Petrol Pump) Date of Readiness 26-07-2022	Status Pending	▼ .
Email Address3 <mark>ce-mm@pspcl.in</mark>	Supplier Contact No.	Result of Last IR	
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