



IACS Oracle Up-gradation – Purchase Order

User Manual

Version: 1.0

ORACLE®

1 Introduction

1.1 Document Structure

This document describes step by step procedure to be followed for Purchase Order process of IACS in Oracle Applications. The document is organized in the following manner:

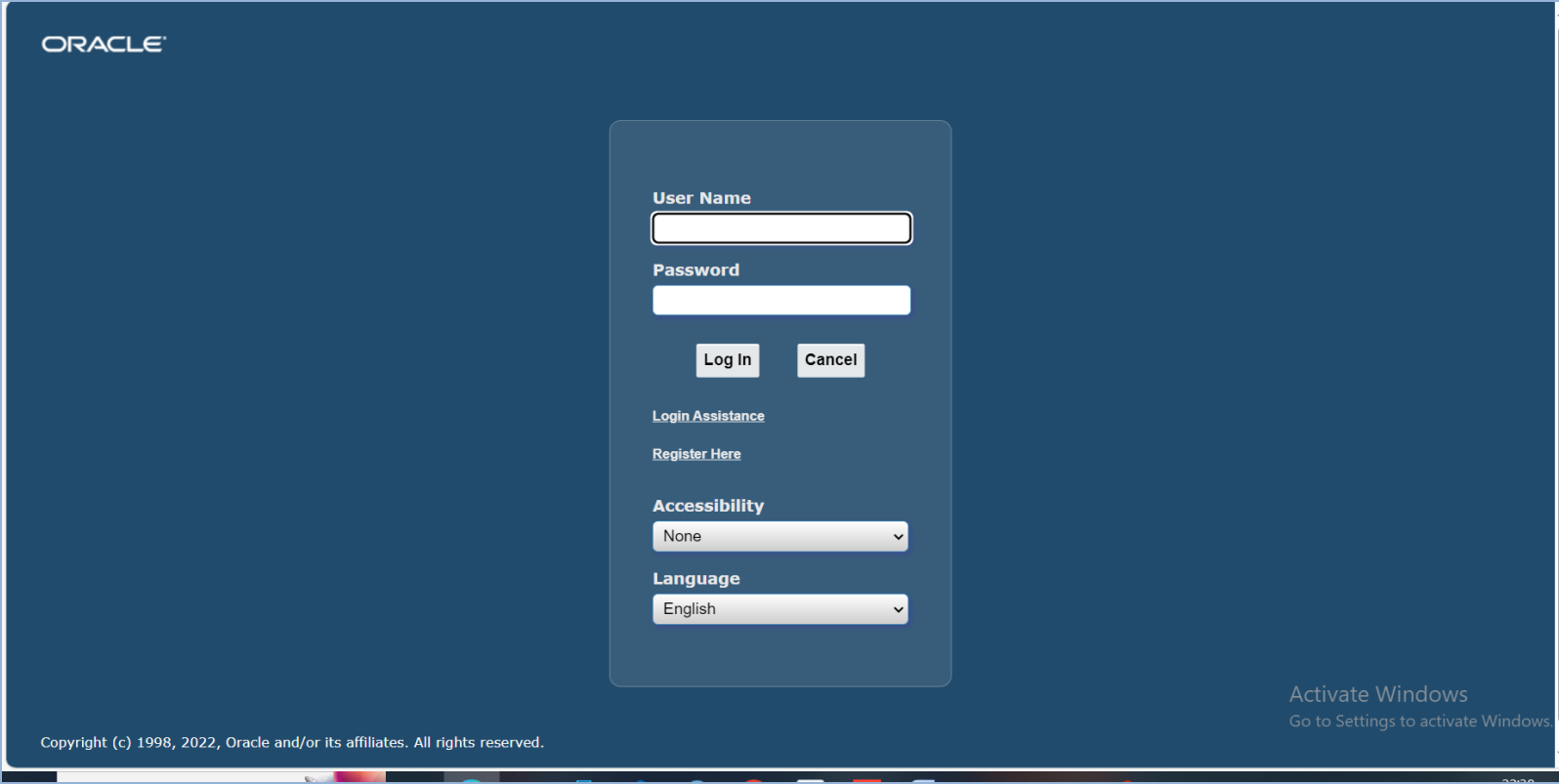
Section 1 covers the document structure along with key business processes of Purchase Order

Section 2 covers the details of key business process flows in Oracle.

1.2 Key Business Processes

SL.	BUSINESS SCENARIOS	DESCRIPTION
1.	Purchase Order	
1.1	Log In and Open Responsibility	How to login and Open the Requisition Form
1.2	Auto-creation of Purchase Order	Automatically create Purchase Order from an approved Purchase requisition.
1.3	India Localization Taxes	Add India Localization taxes in Purchase Order
1.3	Approve Purchase Order	Approval of Purchase Order
1.4	Cancel Purchase Order	Process of cancelling a purchase order.
1.5	Reassign, Reject and request information Purchase Order	Process of delegating the approval authority and rejection of purchase order. Request for extra information.

Step 1: Log In using User Id & Password

The image shows the Oracle login interface. It features a dark blue background with the Oracle logo in the top left. A central white box contains the login fields: 'User Name' and 'Password', each with a text input field. Below these are 'Log In' and 'Cancel' buttons. Further down are links for 'Login Assistance' and 'Register Here'. At the bottom of the white box are 'Accessibility' and 'Language' dropdown menus, currently set to 'None' and 'English' respectively. The bottom of the screen displays a copyright notice and a Windows activation watermark.

ORACLE

User Name

Password

Log In Cancel

[Login Assistance](#)

[Register Here](#)

Accessibility

None

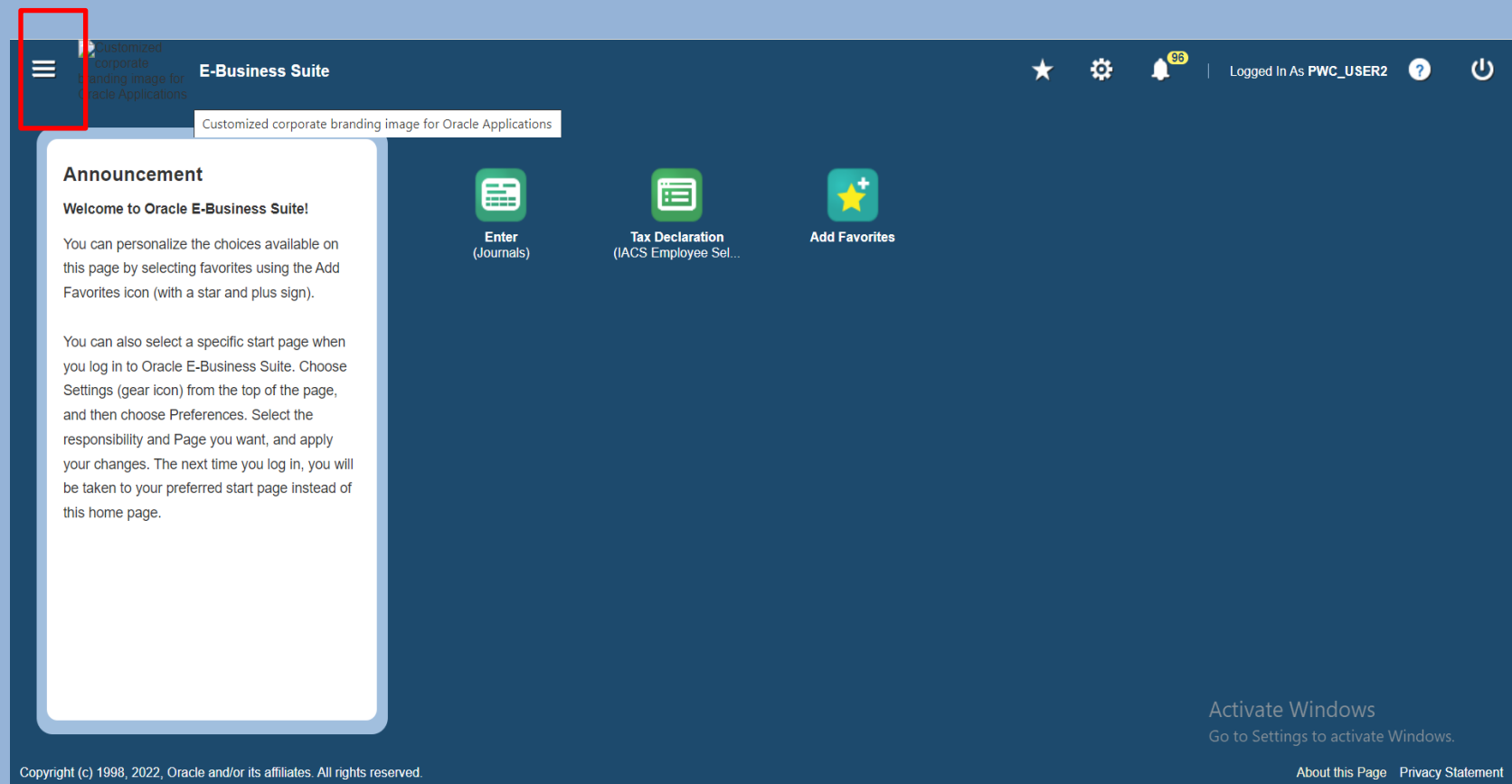
Language

English

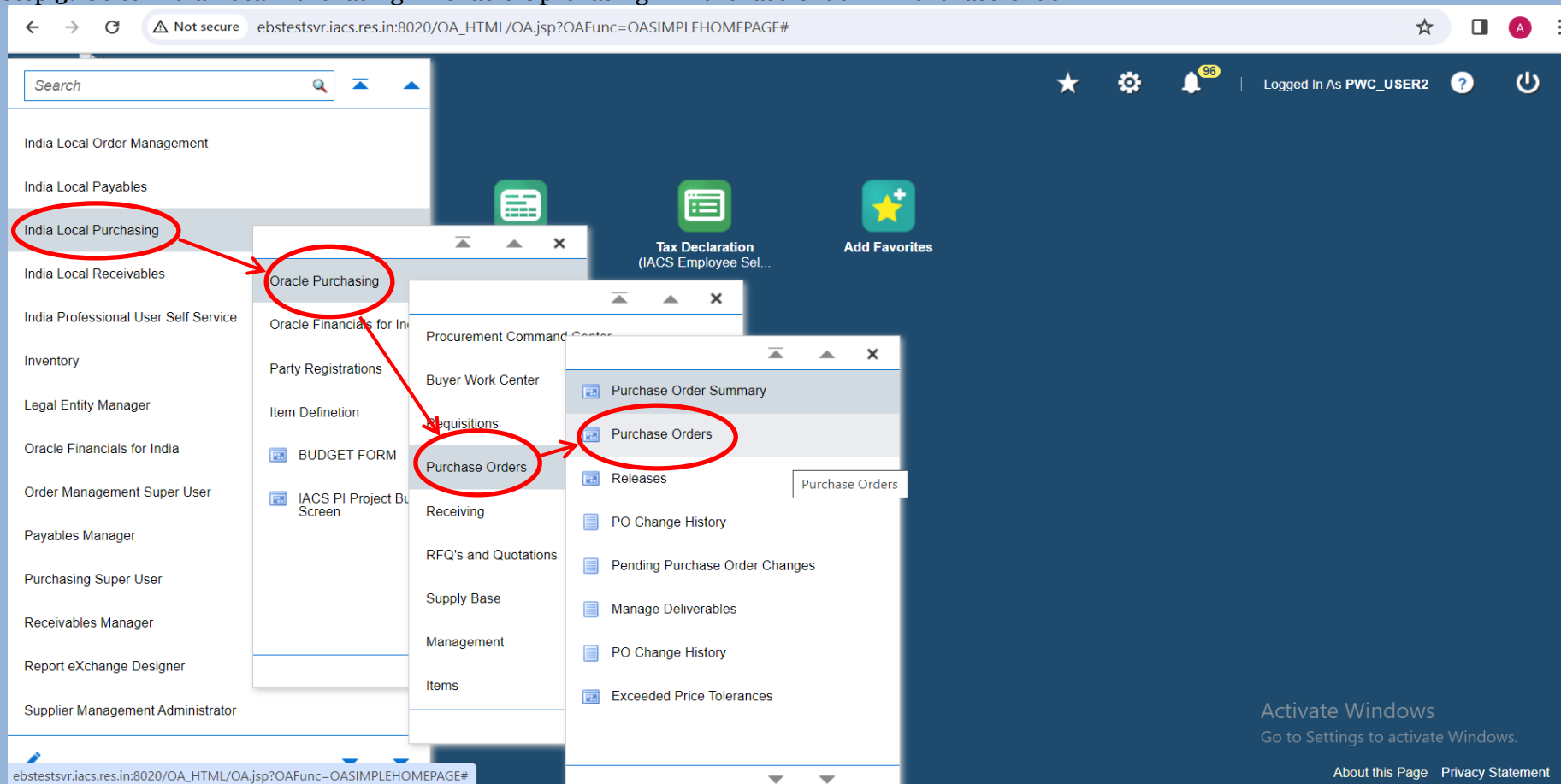
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Activate Windows
Go to Settings to activate Windows.

Step 2 : Click On the Three Lines on the Top Left



Step 3: Go to India Local Purchasing -> Oracle Upurchasing -> Purchase Order -> Purchase Order



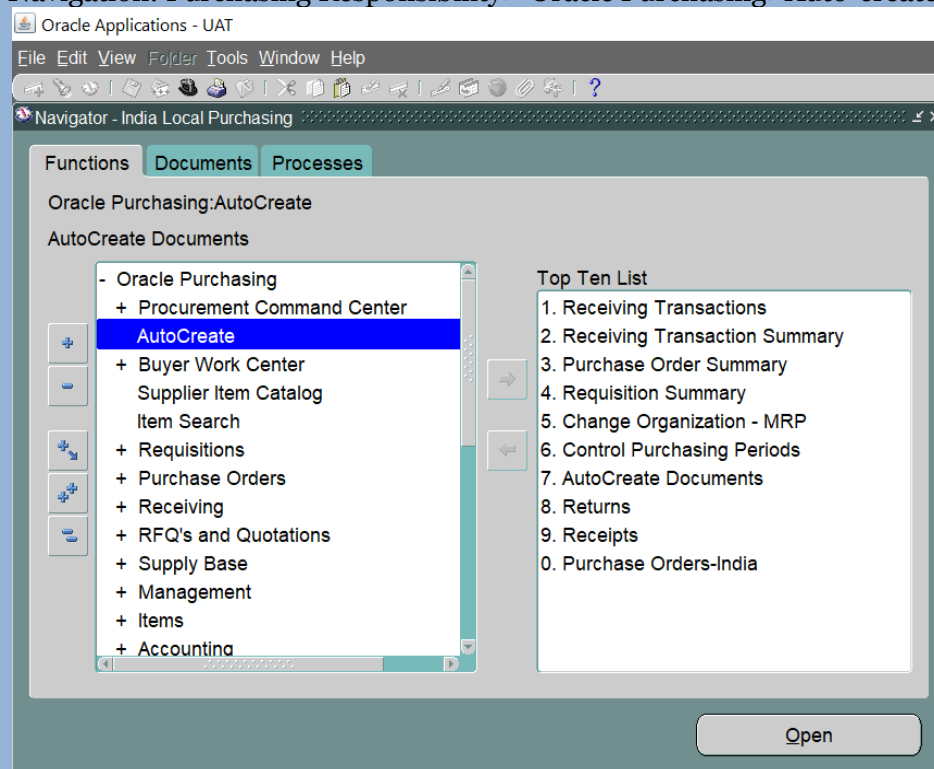
2 Purchase Order

2.1 Auto-creation of Purchase Order

Screen: Auto-create Screen

Purpose: To create a new Purchase Order from an approved purchase requisition.

Navigation: Purchasing Responsibility> Oracle Purchasing>Auto-create



Step1: Enter the approved requisition number which will be converted to a Purchase Order. Step 2: Remove the name of the Buyer and ensure the “Buyer” field is empty. Click on “Find”

Oracle Applications - UAT

File Edit View Folder Tools Window Help

Find Requisition Lines

Unit: IACS Corporate OU (NE)

Approved: Yes

Requisition: 2350000126

Emergency PO Number:

Supplier Sourcing:

Supplier:

Document Type:

Buyer:

Requester: ...

Preparer:

Supplier List:

Supplier Site:

Document:

☐ Global

☐ VMI Only

☐ Show External Locations

Minimum Amount:

Currency:

Rate Type:

Ship-To:

Line Status

Item, Rev:

Job:

Category:

Description:

Line Type:

Clear Find

Enter Requisition No

Remove the name of the Buyer

Step 3: Select the Requisition line by clicking on the corresponding checkbox and Click on “Automatic”.

Oracle Applications - UAT

File Edit View Folder Tools Window Help

Find Requisition Lines

Operating Unit IACS Corporate OU (NE)

AutoCreate Documents

	Requisition	Line	Item	Rev	Category	Item Description	UOM	Quantity	Unit Price	Need-By
☒	2350000126	1	1000113		Purchased Item	COMPUTER PERIPHERAL	Number	10	10000	25-APR
☐										
☐										
☐										
☐										
☐										
☐										
☐										
☐										

Action Create
Document Type Standard PO
Grouping Default
Group Shipments ☒

Manual Automatic

Clear Find

Step 4: Select the “Supplier” and the “Site” to whom the order will be placed. Click on “Create”

Oracle Applications - UAT

File Edit View Folder Tools Window Help

Find Requisition Lines

Operating Unit IACS Corporate OU (NE)

AutoCreate Documents

Requisition	Line	Item	Rev	Category	Item Description	UOM	Quantity	Unit Price	Need-By
2350000126	1	1000113		Purchased Item	COMPUTER PERIPHERAL	Number	10	10000	25-APR

New Document

Global Agreement Purchasing Org IACS Corporate OU (NE)

Document IACS-G/DOFFIC/2 RFQ Type

Release Release Date

Supplier SPL Infotech Supplier Site Kolkata

Supplier List Name

Currency

Source Default

Requisition Line

Currency INR Rate Type

Rate Date 07-APR-2024 Rate

Create Cancel

Put the value – Price type, Preparer, PI Name, Gem Applicable

[illegible]

2.1.1 Terms and Conditions

Screen: Purchase Order Screen

Purpose: To specify terms and conditions

Navigation: Purchase Order Screen-> Tools Dropdown -> Choose Terms and Conditions

2.1.2 Copy To

Screen: Purchase Order Screen

Purpose: To specify whom to forward a copy of the particular purchase order

Navigation: Purchase Order Screen->Tools Dropdown-> Choose Terms and Conditions ->Choose the tab named Copy To

Line Num	Term Code	Description
1	DD/BANK GAUR	All DDs/Bank Gaurantee should be preferably of the Indian National Banks loca
	JURISDICTION	In case of any litigation the matter will be dealt within the jurisdiction of High Co
	PAY1	100% payment against delivery of good/execution of orders, if 10% Performance
	PAY2	90% payment against delivery of goods/execution of orders. 10% will be retaine
	PAY3	Payment against LC
	PG	Performance Guarantee (10% of the quoted value of goods) in the form of DD of

2.1.3 Checklist

Screen: Purchase Order Screen

Purpose: Until and unless all the remarks buttons are marked YES/NA the 'Approve' button on the PO will not be activated. Also in case of transportation of goods (foreign purchase) by air, rates may be quoted on FOB/CIF and it is mandatory to give reason if rate quoted on CIF after completing all click on Save.

Navigation: Purchase Order Screen->Tools Dropdown->Choose Checklist

ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?page=/xxiacs/oracle/apps/po/checklist/webui/POCheckListPG&_ti=1458147947&lz Search

Corporate branding image for Oracle Applications

Logged In As PWC_USER2

Information

Record saved !!!

Check List

Rows 1 to 13

Description	Response	Remarks
Notice of Tender Inviting published(in-National daily/ITJ/Website)	☐ Yes ☐ No ☒ NA	
Single Bid/Two Bid System	☐ Yes ☐ No ☒ NA	
Constitution of Technical Committee incase of Two Bid System	☐ Yes ☐ No ☒ NA	
Bid Security(EMD) in the form of DD/Bank Gaurantee of Indian Nationalized Bank received	☐ Yes ☐ No ☒ NA	
Technical Specification, where applicable, complied with	☐ Yes ☐ No ☒ NA	
Finance bids opened for Technically qualified bids only	☐ Yes ☐ No ☒ NA	
Incase of transportation of goods (foreign purchase) by ship, rates must be quoted on FOB	☐ Yes ☐ No ☒ NA	
Incase of transportation of goods (foreign purchase) by air, rates may be quoted on FOB/CIF. Mandatory to give reason if rate quoted on CIF.	☐ Yes ☐ No ☒ NA	NA
	☐ Yes	

2.2 GST/ Tax/ Other charges applicable to PO

Screen: Purchase Order Screen

Purpose: To attach GST/Taxes/ Other Charges applicable in the purchase order for India.

Navigation: Purchase Order Screen->Tools Dropdown-> India Tax Details

Oracle Applications - UAT

File Edit View Folder Tools Window Help

Financials for India Taxes

Organization: Administration Document Number: IACS-G/DOFFIC/240000 Currency: INR Amount: 100000

Location: Administration Common Release Number: Tax Amount: 18000

Supplier Tax Invoice Number: Original Tax Invoice Number: GST Document Number:

Supplier Tax Invoice Date: 07-APR-2024 Original Tax Invoice Date: GST Document Date:

E-Way Bill No: E-Way Bill Date: ☐ E-Way Bill Acceptance Total Amount: 118000

Update/Modify: Apply to: Proceed Refresh

Select GST Category from Tax Category Lov to apply Tax and then Save.

Line	Shipment	Item	Item Desc	UOM	Quantity	Price	Tax Category	Location	HSN Code	Line Amount	Line Total	Tax Amount	Intended Use
1	1	1000113	COMPUT	NUM	10	10000	AR - CGST_9% + SGST_9%	Administratic		100000	118000	18000	

Or Select from Tax Rate Name individually and then set Precedences (it is for selection on which tax will be applicable)

SL No.	Tax Rate Name	Tax Type	Tax Point Basis	Assessable Price List	Assessable Value	1	2	3	4	5	6	7	8	9	10	Currency	Tax C
1	SGST_ 9%	State GST (Lia	DELIVERY			0										INR	07-AF
2	CGST_ 9%	Central GST (L	DELIVERY			0										INR	07-AF

FRM-40400: Transaction complete: 1 records applied and saved.

2.3 Approve Purchase Order

Step 1: Query the Purchase Order from the Purchase Order Summary and Click on “Approve”

Oracle Applications - UAT

File Edit View Folder Tools Inquire Actions Window Help

AutoCreate to Purchase Orders - IACS-G/DOFFIC/240001

Operating Unit: IACS Corporate OU (NE) Created: 07-APR-2024 19:34:10

PO, Rev: IACS-G/DOFFIC/240001 0 Type: Standard Purchase Order

Supplier: SPL Infotech Site: Kolkata

Ship-To: Jadavpur Bill-To: Jadavpur

Buyer: Abhra Paul Status: Incomplete

Contact:

Currency: INR

Total: 100,000.00 [..D]

Description:

Lines Price Reference Reference Documents More Agreement

Num	Type	Item	Rev	Category	Description	UOM	Quantity	Price	Promised	[]
1	Goods	1000113		Purchased Items	COMPUTER PERIPH	Numb	10	10000		..

Item: 1000113 COMPUTER PERIPHERALS

Catalog... Currency... Terms Shipments Approve...

Step 2: Submit the PO for Approval. Click on “OK”

Click on forward and choose the approval path. After select the approval path, then Select Forward To, press on OK button.

Oracle Applications - UAT

File Edit View Folder Tools Inquire Actions Window Help

Approve Document - IACS-G/DOFFIC/240001

Approval Details Additional Options

Encumbrance

☒ Reserve ☐ Unreserve Unreserve Date

☐ Use GL Override ☐ Use Document GL Date to Unreserve Accounting Date

Approval

☒ Submit for Approval

☒ Forward

Forward From Abhra Paul

Approval Path DEPARTMENT PO HIERAR

Forward To DIRECTOR OFFICE

Note

Change Summary

Transmission Methods

☐ Print ☐ XML

☐ Fax FAX Number ☐ EDI

☐ E-Mail E-Mail Address

OK Cancel (B)

Step 4 : Go to Purchase Order Summery > Enter PO Number > Find > Select the PO > Go to “Inquire”> “View Action History” to identify the approver with whom the PO is pending for approval.

Oracle Applications - UAT

File Edit View Folder Tools Inquire Window Help

Find Purchase Orders

Purchase Order Headers

Standard Purchase Order - IACS-G/DOFFIC/240001

Seq	Date	Rev	Action	Performed By	Note
4		0		DIRECTOR OFFICE	
3	07-APR-2024 21:0	0	Forward	Abhra Paul	
2	07-APR-2024 21:0	0	Submit	Abhra Paul	
1	07-APR-2024 20:3	0	Reserve	Abhra Paul	

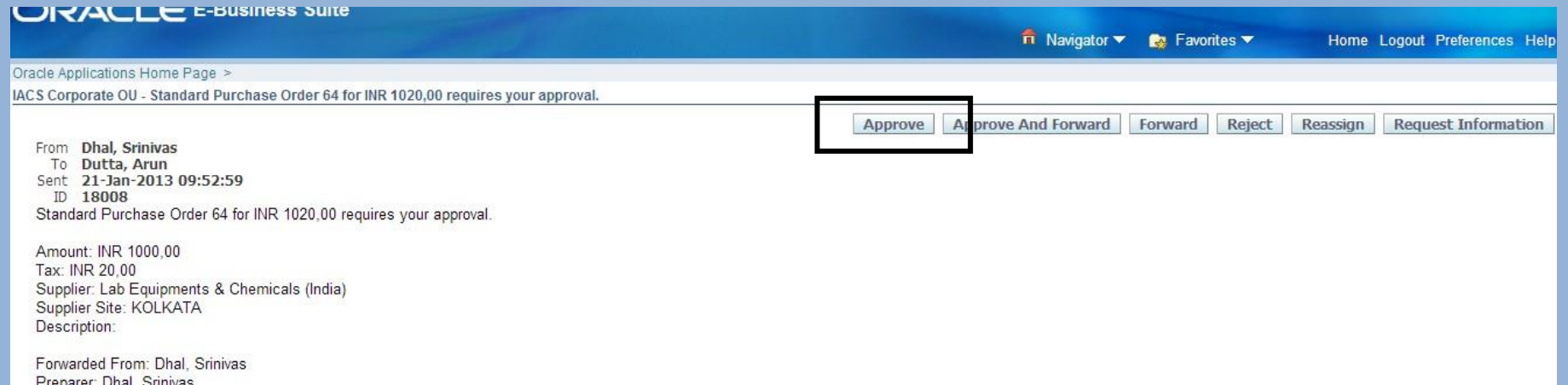
Lines New Release New PO Open

Need-By - Closed -

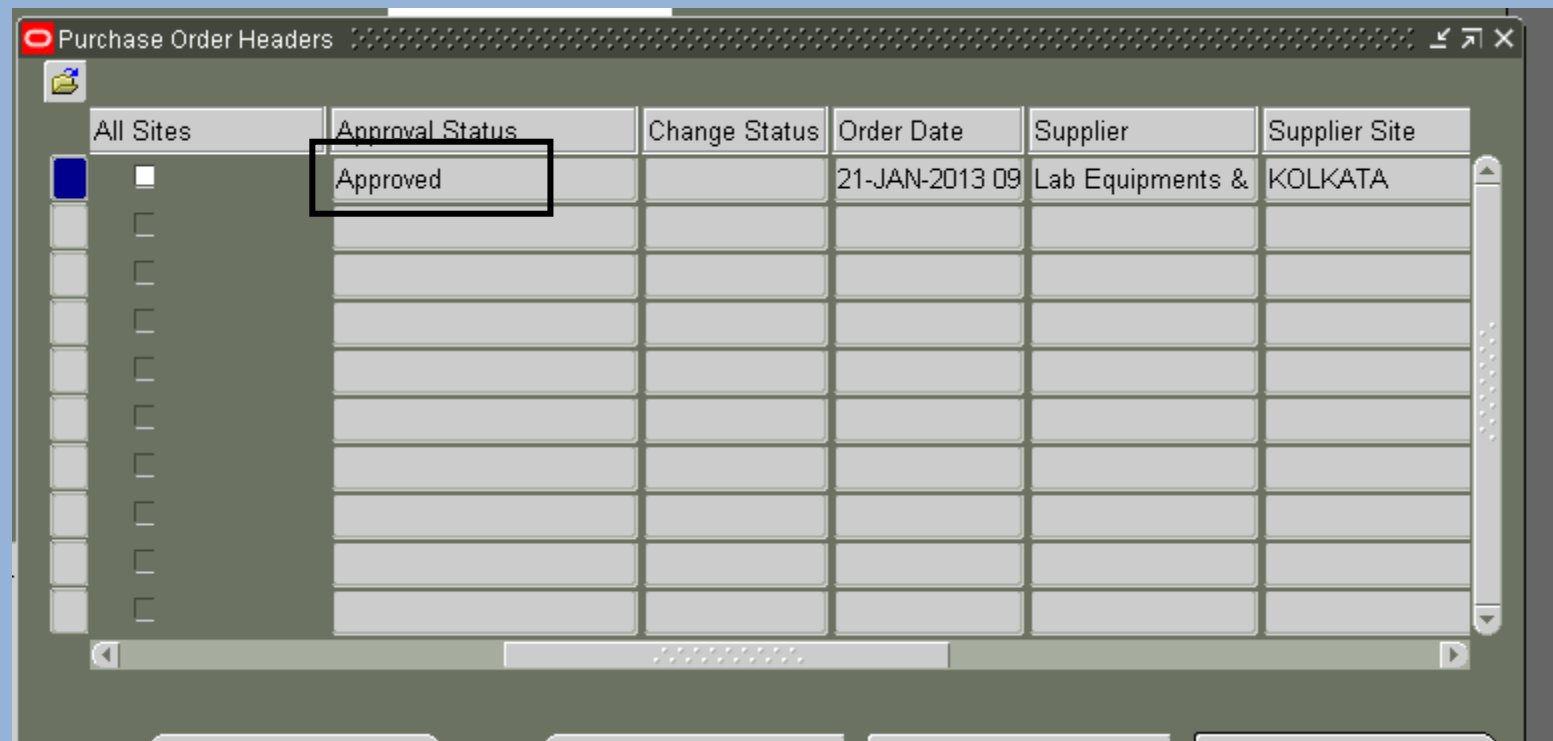
Distributions

Clear New Release (B) New PO Find (J)

Step 5: The approver logs in to approve the Purchase Order. He opens the notification on his Work List and clicks on the “Approve” tab.



Step 6: The PO Approval Status changes to “Approved”

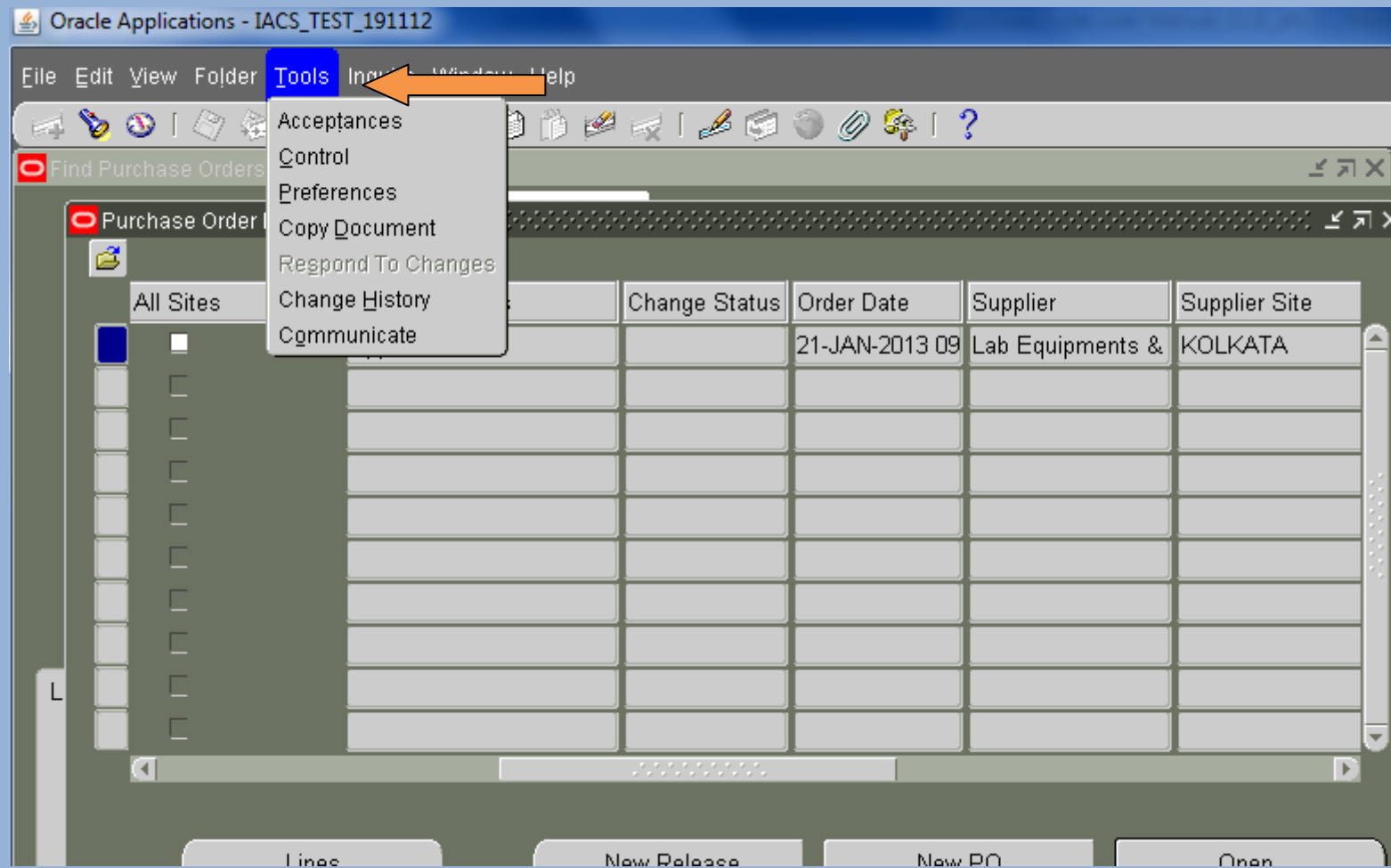


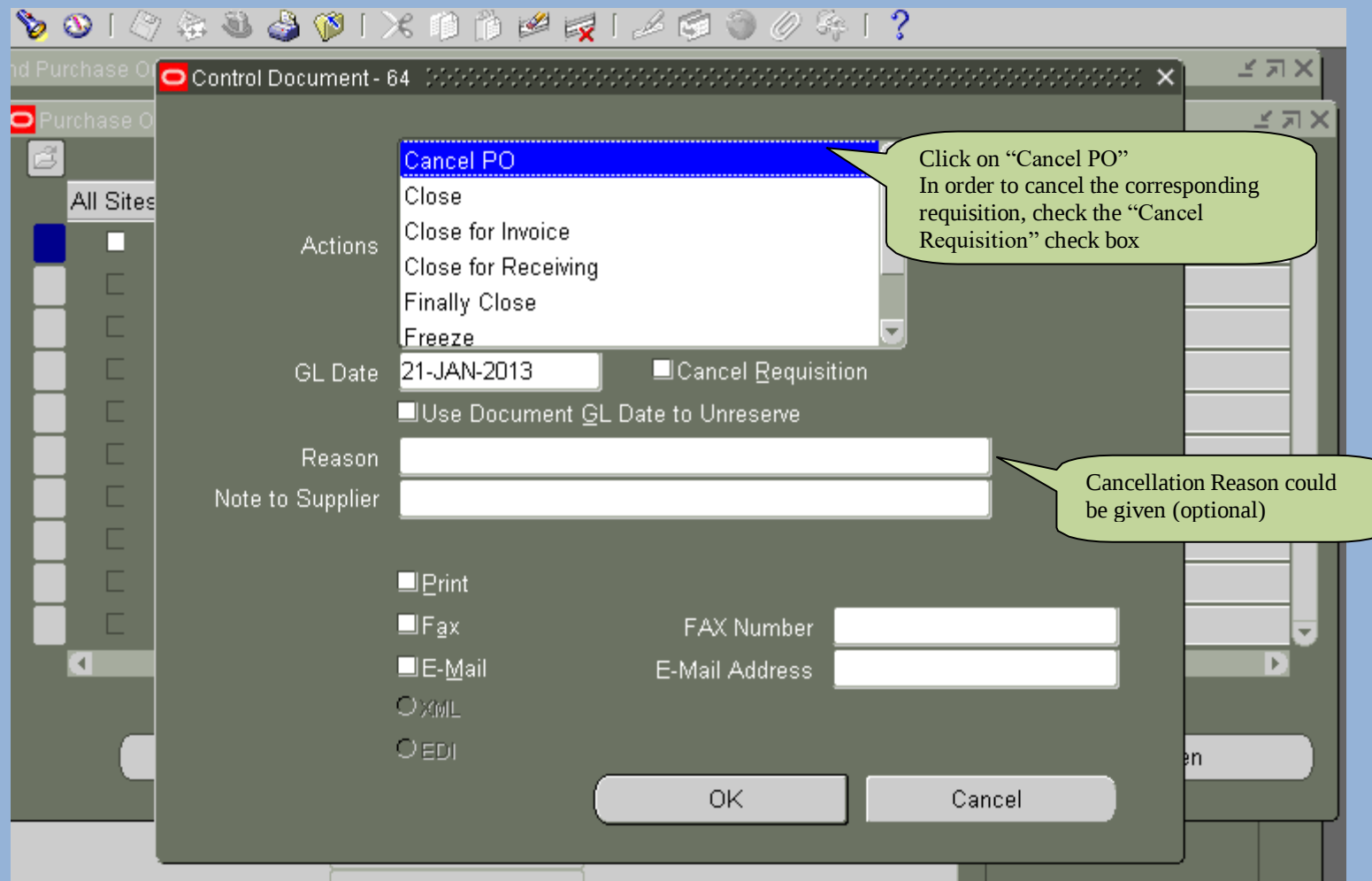
Purchase Order Headers

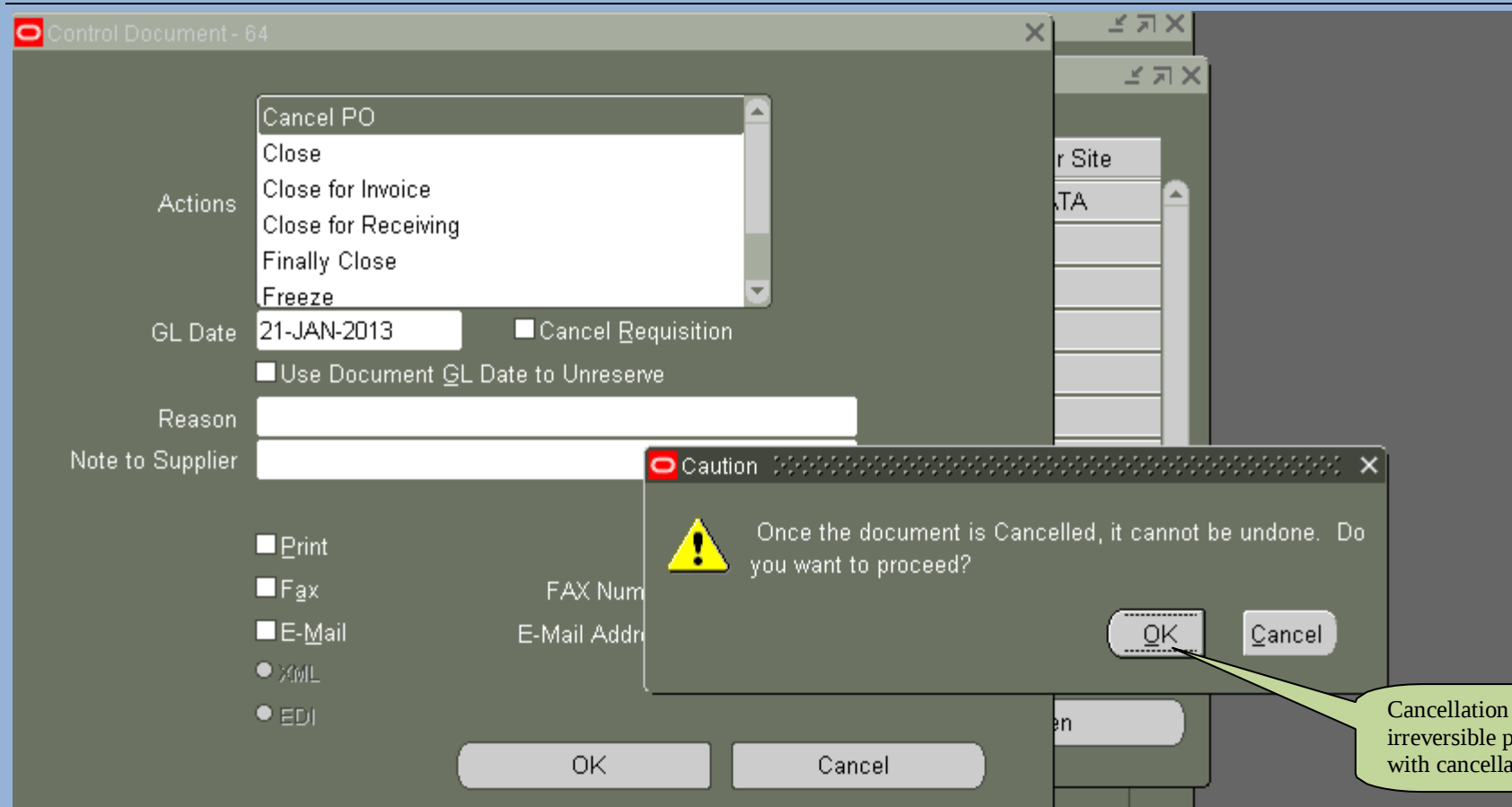
All Sites	Approval Status	Change Status	Order Date	Supplier	Supplier Site
☒	Approved		21-JAN-2013 09	Lab Equipments &	KOLKATA
☐					
☐					
☐					
☐					
☐					
☐					
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☐					

Step 1: Query the Purchase Order to be cancelled from Purchase Order Summary Screen. Go to Tools> Control.

Step 2: Select “Cancel PO” and provide a Reason for cancellation (Optional). Click on OK. This is an irreversible process. So in order to proceed with cancellation click on “OK” in the Caution message.







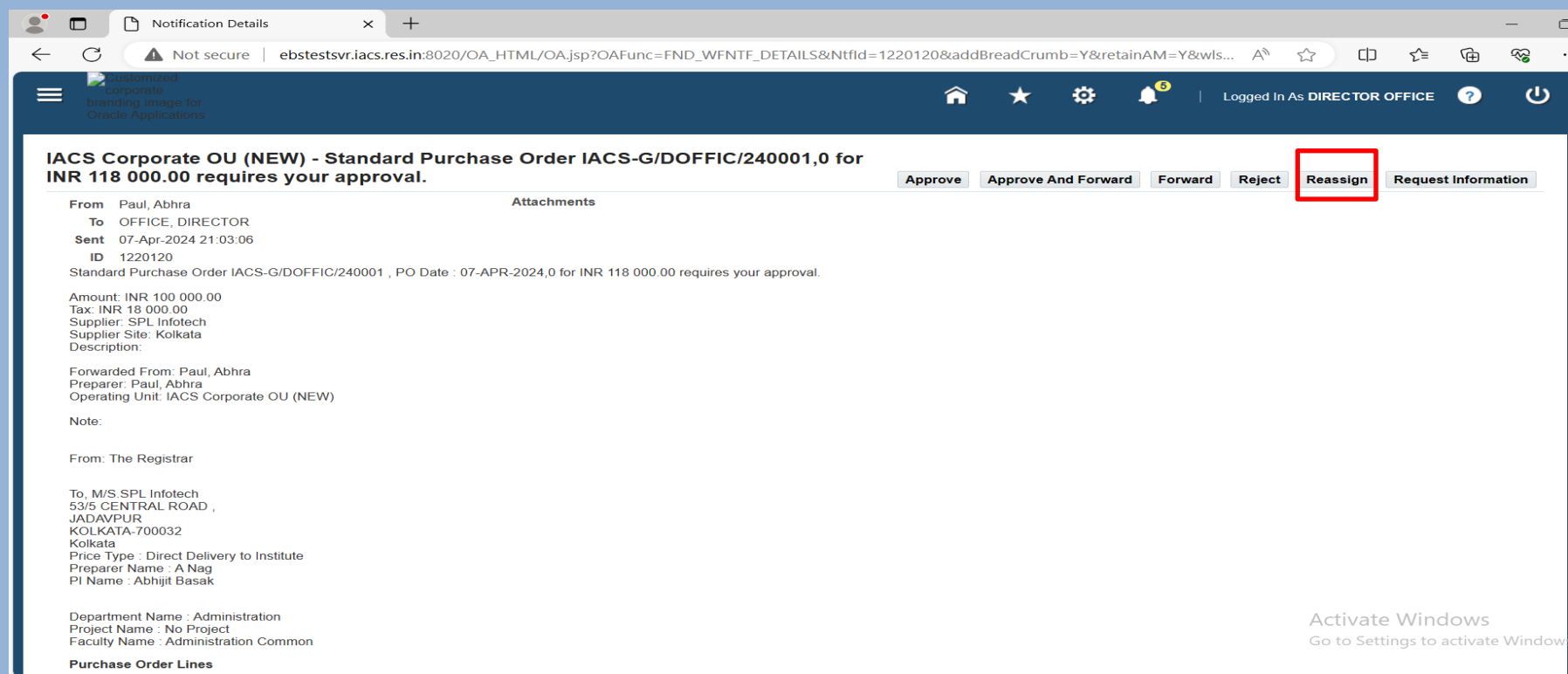
Step 3: The PO “Closure Status” changes to “Closed” and the “Cancelled” checkbox will appear checked.

Purchase Order Headers

Agency	Amount	Matched Amount	Buyer	Closure Status	Cancelled	
	0,00	0,00	Dhal, Mr. Srinivas	Closed	☒	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	
					☐	

Lines New Release New PO Open

Step 1: The Approver, to whom the Purchase Order is sent to take action, might reassign the notification to someone else by clicking on “Reassign”



Notification Details

Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220120&addBreadcrumb=Y&retainAM=Y&wls...

Customized corporate branding image for Oracle Applications

Home Star Settings Notifications 5 Logged In As DIRECTOR OFFICE ? Power

IACS Corporate OU (NEW) - Standard Purchase Order IACS-G/DOFFIC/240001,0 for INR 118 000.00 requires your approval.

Approve Approve And Forward Forward Reject **Reassign** Request Information

From: Paul, Abhra
To: OFFICE, DIRECTOR
Sent: 07-Apr-2024 21:03:06
ID: 1220120

Attachments

Standard Purchase Order IACS-G/DOFFIC/240001 , PO Date : 07-APR-2024,0 for INR 118 000.00 requires your approval.

Amount: INR 100 000.00
Tax: INR 18 000.00
Supplier: SPL Infotech
Supplier Site: Kolkata
Description:

Forwarded From: Paul, Abhra
Preparer: Paul, Abhra
Operating Unit: IACS Corporate OU (NEW)

Note:

From: The Registrar

To, M/S.SPL Infotech
53/5 CENTRAL ROAD ,
JADAVPUR
KOLKATA-700032
Kolkata
Price Type : Direct Delivery to Institute
Preparer Name : A Nag
PI Name : Abhijit Basak

Department Name : Administration
Project Name : No Project
Faculty Name : Administration Common

Purchase Order Lines

Activate Windows
Go to Settings to activate Windows

Reassign Notifications

Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=WF_NTF_REASSIGN&addBreadCrumb=Y&retainAM=Y&Ntfld=1220120&addB...

Customized corporate branding image for Oracle Applications

Home Star Settings Notifications 5 Logged In As DIRECTOR OFFICE ? Power

Notification Details >

Reassign Notification: IACS Corporate OU (NEW) - Standard Purchase Order IACS-G/DOFFIC/240001,0 for INR 118 000.00 requires your approval. Cancel Submit

* Indicates required field Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete ownership of and responsibility for that notification.

* Assignee All Employees and Users Director 

☒ DOCKETED
☐ Transfer notification ownership

Comments

[Return to Worklist](#)

Activate Windows
Go to Settings to activate Windows.

ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=WF_NTF_REASSIGN&addBrea... [About this Page](#) [Privacy Statement](#)

Step 2: Select the Assignee name from the LOV and Click on “Submit”

Step 3: The Approver of a PO can also reject the Purchase Order by clicking on the “Reject” tab. The Approval Status of the PO changes to “Rejected”

The screenshot shows a web browser window with the URL `ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&NtfId=1220120&addBreadcrumb=Y&retainAM=Y&wls...`. The page title is "IACS Corporate OU (NEW) - Standard Purchase Order IACS-G/DOFFIC/240001,0 for INR 118 000.00 requires your approval." The page is logged in as "DIRECTOR". The "Reject" button is highlighted with a red box. The page content includes a "From" field with "OFFICE, DIRECTOR" and "Attachments", a "To" field with "Director", a "Sent" field with "07-Apr-2024 21:10:33", and an "ID" field with "1220120". The main body of the email contains the following text:

Standard Purchase Order IACS-G/DOFFIC/240001 , PO Date : 07-APR-2024,0 for INR 118 000.00 requires your approval.

Amount: INR 100 000.00
Tax: INR 18 000.00
Supplier: SPL Infotech
Supplier Site: Kolkata
Description:

Forwarded From: Paul, Abhra
Preparer: Paul, Abhra
Operating Unit: IACS Corporate OU (NEW)

Note:

From: The Registrar

To, M/S.SPL Infotech
53/5 CENTRAL ROAD ,
JADAVPUR
KOLKATA-700032
Kolkata
Price Type : Direct Delivery to Institute
Preparer Name : A Nag
PI Name : Abhijit Basak

Department Name : Administration
Project Name : No Project
Faculty Name : Administration Common

Purchase Order Lines

Notification Details

Not secure | ebstestsvr.iacs.res.in:8020/OA_HTML/OA.jsp?OAFunc=FND_WFNTF_DETAILS&Ntfld=1220120&addBreadCrumb=Y&retainAM=Y&wls...

Customized corporate branding image for Oracle Applications

Home Star Settings Notifications (3) Logged In As DIRECTOR ? Power

IACS Corporate OU (NEW) - Standard Purchase Order IACS-G/DOFFIC/240001,0 for INR 118 000.00 requires your approval.

Approve Approve And Forward Forward Reject Reassign **Request Information**

From OFFICE, DIRECTOR **Attachments**

To Director

Sent 07-Apr-2024 21:10:33

ID 1220120

Standard Purchase Order IACS-G/DOFFIC/240001 , PO Date : 07-APR-2024,0 for INR 118 000.00 requires your approval.

Amount: INR 100 000.00
Tax: INR 18 000.00
Supplier: SPL Infotech
Supplier Site: Kolkata
Description:

Forwarded From: Paul, Abhra
Preparer: Paul, Abhra
Operating Unit: IACS Corporate OU (NEW)

Note:

From: The Registrar

To, M/S.SPL Infotech
53/5 CENTRAL ROAD ,
JADAVPUR
KOLKATA-700032
Kolkata
Price Type : Direct Delivery to Institute
Preparer Name : A Nag
PI Name : Abhijit Basak

Department Name : Administration
Project Name : No Project
Faculty Name : Administration Common

Purchase Order Lines

Activate Windows
Go to Settings to activate Windows

Click on request information, which information need write down in “request information” tab then select the person and submit.

