



Requisition Job Aide



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Accessing Oracle Financial Application

1. Open San Joaquin Delta College Website



• Go to the San Joaquin Delta College website by entering the URL deltacollege.edu in the browser of your choice.

Recommendations: Use Chrome or Mozilla Firefox (Internet Explorer is not a recommended browser for the use of the Oracle Financial Application)

• Scroll to the bottom of the page and select Faculty & Staff Resources.



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COLLEGE	3	Cornet/HET No	bout A	dmissions	Academics ¹⁴⁴ Services	Student Life	Q	
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Scantron Documentation	9	Canvas Login		U.	Academic Senate		>	
Curriculum Resources	,	Roster System			SIDC Teacher's Asso	cation .	ie.	
Faculty Handbook	\$	Recommendation/	Deterence		Abre reache s Asia	, and the second s		
Student Learning Outcomes and Assessment	>	System 2020 Lite		5				
For Staff								
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	>	EXTERNAL ORGANIZATION Califers	85	2	Teets Gracle Finance Appl	ication	æ	
0063 87 DELIN	>		85	7		Anna Chon	2	
Classified Senate	•	CalPERs	15		Oracle Finance Appl	Anna Chaol	_	
Classified Senate Management Senate	•	CalPERs	83		Oracle Finance Appl	Anna Chaol	_	

• Scroll to the For Staff section and select Oracle Finance Application.

The login page for the Oracle Financial Application will appear in a separate browser window.



2. Login to the Oracle Finance Application

Email Username	- Student Linger Help
Pasaword	- Brightoyee Login Help
Email Password	
Login	

• Enter your **email username** and **email password** and select **Login**. The Oracle Finance Application will appear.

14	You have a new home page!	Open it with the home icon or the company logo. You can continue to access this page by selecting the My Dashboard item in the ravigation menu.
/		

• Select the Home icon.

The Oracle application springboard will appear.



Creating Requisitions

1. Access Requisitions Page

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	• • •			0
JE Jennifer Eckert	Ro Mo	Procument	Social	
Share thoughts with your colleagues 103				
0 0 0 Conversations Following Followers	Getting Started	My Deshboard M	arketplace	
Employee News My Flags	X Tools			~

• Select the **Procurement** icon to open the Procurement folder.



• Select the **Purchase Requisitions** icon.



Me	Procurement	-				
T _k breatry	W Purchase Requisitions					
Ly Cobcarding	My Hocepts			朣	a ^{\$} a	
D monom	sta Sone			11		
To Cereir and Performance			Me	Procumment	Social	
🛔 Personal Information	Wy Reshboard	205. Ro				
Time 1	1 Marketplace	Alb				
Reg Bonetts	O Coud Customer Connect			822	e lê	
O Personal Brand	Tools)	<u>A</u>			
T Competitions	 Set Preferencias Wondat 	ollowers	Getting Started	My Dashboard	Marketplace	
Of Web Clock	E Spaces					
Holes and Delegations	E Reports and Analytics					
Expenses	Scheduled Processes		**			
Sales Ef' Analytics	\$1 File Import and Expant					
	Download Desktop Integration		Tools			
Product Management						
		_				

Note: You can also select the Purchase Requisitions link in the Navigator menu.

	Purchase My Receipta	
quisitions	Requisitions	n Tasks + Manage Requisitions 12 1
Recent Requisitions	Search Recent Purchases	e Tasks + Manage Requisitions 1 1
5JD02229 Training Test Requisition	No data to display.	

The Requisitions page will appear.

• Select the More Tasks dropdown.



		Purchase My Receipts Requalitions	
quisitions			
			More Tasks Monage Requisitions
hop by Category *		Search	Update Preparer and Requester Update Requisition Preference
Recent Requisitions		Recent Purchases	
SJD02229 Training Test Requisition	Incomplete	No data to display.	

• Select the Request Noncatalog Item dropdown.



2. Update Requisition Preferences

DELTACOLLEGE 🏠 🚖 🏱 🗅	Purchase My Receipts	G
luisitions		Motio Tables.vv Manage Requisitions 707 t Request Noncatalog Item
top by Category +	Search	Update Property and Requester
Recent Requisitions	Recent Purchases	Update Requisition Preferences
SUD0229 Incomplete Training Sed Requisition	No data to display	
Recartly Viewad		

• Select the More Tasks dropdown and then Update Requisition Preferences.

	SJDC Business Unit	a)			
Requisitioning BU	JULY DUSITIESS UNIT	•			
Shipping	and Delivery				
Reques	ter Eckert, Jennifer				
* Deliver-to Locat	Ion DATA CENTER AV	Q			
Favorite Ch	* Nickname	* Charge Account		De	ete
0	academic lab	1100.00000.4501.679000.40027.0	题	>	¢
•	office supplies	1100.00000.4501.679000.00000.0	50	>	¢
				Save and Close	Cance

The Edit Requisition Preferences page will appear.

• Select the check next to the charge account you wish to make the primary default charge account.

Note: This charge account will be the charge account that will be charged if a requisition is submitted and you do not change the account within the requisition details.

Note: Select + *to add charge accounts or* **X** *to delete charge accounts.*



Optional: Set up your Requisition Preferences to reflect the appropriate Business Unit (Funds) you will use when creating your purchase requisitions.

Note: You must set your Requisition Preferences initially, prior to creating any requisition.

See below for the Business Units and their corresponding funds.

	SJDC Business Unit		Auxiliary Business Unit	Four	dation Business Unit
1100	General Fund	5100	Bookstore	8300	Foundation
1200	Grants/Categoricals	5200	Food Services		
1300	Parking Fund	7100	ASDC - Assoc Stud		
3400	Farm	7200	ASDC - Rep Fee		
4200	Bond	7500	Scholarships		
3300	Child Development	7900	Trust		
6100	Self Insurance	8100	Clubs		
3900	RDA				
4100	Capital Projects				

If you are not sure what Business Unit to choose, please call your Fiscal Analyst and they will be happy to assist you.



3. Create Noncatalog Request

1	Item Type	Goods or services billed	by amount a	1	(C) N	lew supplier		
* Iter	n Description				Supplier		Q	
			1		Supplier Site			
* Ca	itegory Name		8		Supplier Contact		4	
	* Amount				Phone			
	* Currency	USD 💌			Fax			
					Email			
					Supplier Item			
tachments								
vow • + ×								
Туре	Category	* File Name or UR	aL.	Title	Description	Attached By	Attached Date	
deta to display.				1				

• Select **Goods or services billed by amount** in the **Item Type** dropdown to create a requisition by amount (i.e., Yearly open PO, Contracts, etc...).

	Item Type	Goods or services billed by quantity \$		0	New supplier		
	tem Description			Supplier		Ф.	
				Supplier Site	*		
	Category Name	q		Supplier Contact		. 8	
	* Quantity			Phone			
	* UOM Name	*		Fax			
	* Price			Email			
	* Currency	US0 💌		Supplier item			
tachments							
Vew	Category	* File Name or URL	Title	Description	Attached By	Attached Date	

• Select **Goods or services billed by quantity** in the **Item Type** dropdown to create a requisition by quantity.

Note: The Quantity and UOM Name will appear.



	* Item Description	Supplier		q	
		Supplier Site			
	* Category Name Q	Supplier Contact	-	1	
	* Guantity 1	Phone			*
1	* UOM Name	Fax			
/	* Price	Email			
/	* Carrency USD +	Buppler Item			1
tachment	ts				
Vew •	+ X Category * File Name or URL	Title Description	Attached By	Attached Date	

- o Enter the required fields (displayed with an asterisk), supplier, and attachments:
 - **Item Description**: This description of the item to be purchased. The detail of this description should follow the Purchasing Policy Guidelines.
 - **Category Name**: The category name (i.e., commodity code) represents the item type and associated buyer.
 - **Quantity**: The quantity field is required when creating a requisition billed by quantity.
 - **UOM Name**: This unit of measure field is required when creating a requisition billed by quantity.
 - Supplier: The supplier should represent an existing supplier that is searchable. If the supplier is a new supplier, select the New supplier checkbox directly above the Supplier field so that the Purchasing Department can create the supplier in the system. Note: For all new suppliers, please attach all required supporting documentation.
 - Attachments: Select the + symbol to add attachments to the requisition.

				Internet of the second s	CLOSED COLOR	Done 1
Rem Type	Goods or services billed by quantity \$		0	New supplier	1	
* Item Description			Bupplier		9	
			Suppler Site	*		
* Category Name	Q,		Supplier Contact		4	1
* Quantity	8		Phone			
* UOM Name			Fax			
* Price			Email			
* Cumpney	usb 💌		Supplier Item			
tachments						1
Vew + ×						
Type Category	* File Name or URL	Title	Description	Attached By	Attached Date	

• Select Add to Cart to add the line item to the requisition.

Note: All line items should be added to cart before you will submit the requisition.

Note: Each line item will be added to the cart and the cart number will display.

Note: Include the shipping and freight charges as separate line items (Category Name of these lines should match the original line item's category name).

Note: Only one supplier per requisition is allowed, thus you only need to enter the supplier on the first line item of the requisition.

reate Noncatalog Req	uest		Add to Shopping List	Add to Cart Done	M 1
Item Type	Boods or services billed by quantity 2		New supplier	1	
* hem Description		Supplier		Q	
		# Suppler Site	*		1
* Category Name		Supplier Contact			1
* Quantity	1	Phone			1
* UOM Name	1	Fax			1
* Price		Email			1
* Gurrancy	uso •	Supplier Item			
achments					
/ww • + ×					
Type Category data to deplay	* File Name or URL	Title Description	Attached By	Attached Date	

• Select **Done** once all requisition lines have been added to the cart.

The **Requisitions** summary page will appear. 11

quisitions	Purchase My Receipts Requisitions	
unarron la		More Tasks + Manage Requisitions
hop by Catagory *	Search	Training Test Requisition \$ 1,500.0 X
Recent Requisitions	Recent Purchases	Total \$1,500.00 Review Submit
SJD02229 Training Test Requisition Incomplete	No data to display.	

• Select the cart icon to view the items in the cart, then select **Review** to open the requisition to review the line item details before submitting the requisition.

Note: It is important to review the requisition first to confirm the charge accounts you wish to use.

The **Requisition** page will appear.

neq	uisition: SJDI	02229					Check Funds	View Life Oycie	Actions *	Done
								Duplicate	Z	
equisitioning BU	SJDC Business Un	α	Creation Date				Requisition Ama	Cancel Regue	ution	
Entered By	Fjennifer Eckert		Status	Incomplete	i.		Approval Amo	Delete	_	
Description	Training Test Requi	stion	Justification				Funds Sta	Edit		
							Attachme	Reassign	~	
							Association	View Docume	nt History	
equisition L	ines							View PDF		
Actions ¥ V	lew 👻 Format 💌	Treeze 📷	Detach al Wrap							
Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Str	itus C
Line 1	Item	Description computer	Category Name Computer Hardware, Soft		UOM Ea	Price 1,500.00.USD	-	Status Incomplete	Funds Sta	0
Line 1 Rows Selecte			ALC: NOT THE OWNER		1994	ward and	-			0
1	nd 1 Column	computer	ALC: NOT THE OWNER		1994	ward and	-			0
1 Rows Selecte	nd 1 Column S	computer	ALC: NOT THE OWNER		1994	ward and	1,500.00			0
1 Rows Selecte	nd 1 Column S	computer a Hiddon 13 Pannter Eckert	ALC: NOT THE OWNER		1994	1,500.00 USO	1,500.00 e Expense			0
1 Rows Selecte ne 1: Detail Reque	id 1 Column S Requester	computer a Hidden 13 Puenniter Eckert a/16/18	ALC: NOT THE OWNER		1994	1,500.00 USD Destination Type	1,500.00 e Expense e OFFICE DEPOT			0
1 Rows Selecte ne 1: Detail Reque Detive	id 1 Column IS Requester Isted Delivery Date	computer e Hidden 13 Paennifer Eckert art6/18 Internal	ALC: NOT THE OWNER		1994	1,500.00 USD Destination Type Suggested Supplier	1,500.00 e Expense e OFFICE DEPOT			0



Select the Actions dropdown and then select Edit.

The Edit Requisition page will appear.

the same of the set of the set of the set of								
dit Requisition: SJD02229	9		Strop	Check Funds	Manage Approvals	View PDF	Bave	• Subm
Requisitioning BJDC Business Unit		Justificatio	n				puisition Amount	1,500.00 USD
* Description Training Test Requisition	n					Approval	Amount	1,835.00 USO
	· · · · · · · · · · · · · · · · · · ·					Fund	e Status	Not reserve
						Attai	ofernierts.	None +
quisition Lines								
	/ X III Presser 🔡 De	etach	ар					
	🖌 🗶 📗 Pressa 🔡 De Category Name		uom Name	Pric	e Amount (USD)	Funds Status	é	Delete
kotons 🔹 Vew 🔹 Format 👻 📋			UOM Name	Pric 1,500.00 US		Funds Status		Delete
Actions • View • Format • 📄 Line Description	Category Name	* Quantity	UOM Name			Not reserved		
Actions + View + Format + Line Description 1 computer Total	Category Name	* Quantity	UOM Name		D 1,500.00	Not reserved		
Actions Vision Format Une Description Computer Total Rever Selected Columns Hidde	Category Name	* Quantity	UOM Name		D 1,500.00	Not reserved		
Actions View Format Line Description t computer Total Format Line 1: Details	Category Name	* Quantity	UOM Name		D 1,500.00	Not reserved		
Actions Viaw Format Line Description Computer Total Rows Selected Columns Hidde	Category Name	* Quantity	UOM Name		D 1,500.00	Not reserved		
Actions View Format Line Description t computer Total Format Line 1: Details	Category Name Computer Hardware, en 8	* Quantity	UOM Name Es		0 1,500.00 1,500.00	Not reserved		

Line Descriptio	Den .	Category Name	* Quantity	UOM Name	P	rice Amount (US	Di Funds Status	Delete
2 computer		Computer Hardware,	- Wit	fa .	1,500.00	USO 1,500	00. Not reserved	×
Total						1,500	00	
Rows Selected 1	Columne Hilden 8							
Line 2: Details								
f Delivery								
	Requester Eckert, Jernifer			* Deliver	a Location DATA	CENTER AV	Q,	
	Urgent No 1			Deliver	to Address PS15	Pacific Ave., STOCK	ON, CALIFORNIA 9525	7, UNITED STATE
Requested 5	Urgent No 1 Delivery Date 5/16/16			Deliver	to Address P515	1 Pacific Ave, STOCKI	ON, CALIFORNIA 8525	7, UNITED STATE
Will Selected				Deliver	to Address P515	1 Pacific Awa, STOCK1	ON, CALIFORNIA 8625	7, UNITED STATE
f Billing		of Wrass		Deliver	to Address PS15) Pacific Ave, STOCKI	ON, CALIFORNIA 9525	7, UNITED STATE
f Billing	Nelivery Date 18/16/18 10	ji Wesp	* Budget I		to Address Pitto centage Quan		on, California 1920 X. Funds Status	V, UNITED STATE
# Biling Vew • Format • Charge Account	Nelvery Date 1016/18 Ta	el Wras	* Budget (tity Amount (USI		
# Billing View • Format • Change Account Nickname	Aelivery Date 10/16/18 Ta X < Transm 10 ¹⁵ Detach Charge Account	Wrap	- 949/18	Date * Pe	centage Quan	tity Amount (USI	 Funds Status Not reserved 	Delete
# Billing View • Format • Change Account Nickname	Aelivery Date 10/16/18 Ta X < Transm 10 ¹⁵ Detach Charge Account		- 949/18	Date * Pe	oentage Quan 100	Uty Amount (USi	 Funds Status Not reserved 	Delete

• Select down the page to view the line item details below and verify the charge accounts used for each line item in the requisition.



Requisiti	ion: SJD022	229		Shop Che	lock Funds	Manage Approvais	View PDF Si	avo 🔻 Submit
equisitioning BU	SJDC Business Ur	nt.	Justification				Requisi	ition 1,500,00
Description	Training Test Requ	istion					Approval Ame	punt 1,635.00 USD
			ð.				Funds Sta	atus Not reserved
							Attachm	ents None 🕂
uisition Line:	\$							
ctions 🔻 View		E 🖌 X 📑 Franze 📆	Detach J Wrap.	M Name	Price	e Amount (USD)	Funds Status	Delete
ctions 👻 View	Format				Price 1,500.00 US		Funds Status Not reserved	Delete X
tions v View	Format	Category Name	* Quantity UC		37.053			00002-2
ctions View Line Desc 1 comp Total	Format	Category Name Computer Hardware,	* Quantity UC		37.053	D 1,500,00		00002-2
Line Desc 1 comp Total	Format Format Tription Tolumns	Category Name Computer Hardware,	* Quantity UC		37.053	D 1,500,00		00002-2
1 comp Total own Selected Line 1: Detail	Format Format Tription Tolumns	Category Name Computer Hardware,	* Quantity UC		37.053	D 1,500,00		00002-2
Line Desc 1 comp Total	Format Format Tription Tolumns	Category Name Computer Hardware,	* Quantity UC		37.053	D 1,500,00		00002-2
Ctions View Line Desc 1 comp Total ows Selected Line 1: Detail	Format Format Tription Tolumns	Category Name Computer Hardware,	* Quantity UC		1,500.00 US	D 1,500,00		00002-2

• Select **Submit** at the top of the page when ready to submit the requisition.

				Purchase Requisitions	MyF	eceiptis				
Edit Requisiti	ion: SJD0222	29				Shep	Check Funds	Manuge Approx	els View PDP	Save * Businyt Save and Close
Requisitioning BU	SUDC Business UN	02		Justification					Requisition Amos	ant 1,500,00 UBD
* Description	Raining Test Requir	ition -						- C	Approval Amos	at 1,635.50 (83
				×					Funds Stat	Las Not reserved
									Attachmer	tta None 🕂
Requisition Line	5									
Actions • Vew	• Format • 📗	1 / X	Press 10	Detach 💷 Wheel						
Line Desc	ription			Category Name	* Quentity	UOM Name	Pri		SD) Funds Statu	Delete
Z comp	whe			Computer Hardware,	1	ER .	1,900.00 U	9D 1.500	100 Not reserved	×
Total								1,500		
Nows Solected	1 Golumna Hi	aden é								
# Line 2: Detail	is .									
a Delivery										
0.00010										
		Eskert, Jennifer					Location DATA C		Q.	
	Urgent	No 1				Deliver-to	Address (\$153)	Pacific Awe, STOCK	TON, CALPORNA	6207, UNITED STATES
		Contraction of the second s	A45							
Reque	tod Delivery Date	3/10/18	6							

Optional: Select the **Save** *dropdown and then* **Save and Close** to save the requisition as a draft.



Search for a Charge Account

You can search for charge accounts in both the Preferences and Requisition pages by selecting the icon next to the charge account field. Once you select the field, a dialog will appear that gives you the option to either search by an alias (i.e., KFS account # and object code) or by entering one or more segment fields.

• Select the **Search Charge Account** icon to search for a charge account.

1	×						arge Account
							Hide Segments
		٠					Alias
					•		Fund
					٠		Source
					•		Organization
							Program
					٠		Activity
					٠		SubActivity
					٠		Object
				Default	٠	0000	InterFund
				None	•	0000	Future1
	Cancel	OK	1	Reset	ch	Sea	

The Charge Account search page will appear.

• Optional: Select the **Alias** dropdown to search for a charge account using the

account alias.

Note: If you know the **Fund**, **Source**, **Organization**, **Program**, **Activity**, **Sub Activity**, or **Object Code**, you can enter those segments and then Ok directly in this window.

Note: The **Interfund** and **Future1** segments are currently not being used and will always display "0000". Although these segments are not used, they are needed as part of the Oracle charge account number and must always be included.



al Hide Segments		
Alias		
2	1201167-0000F-5907	1200 26566 2002 660000 00000 0000F 5907 0000
Fund	1201167-0000Q-5907	1200.26586.2002.660000.00000.0000G.5907.000
Source	1201167-0000H-5907	1200.26586.2002.660000.00000.0000H.5907.000
Organization	1201167-00001-5907	1200.26586.2002.660000.00000.00001.5907.0000 Student Equity Program - Reserve
Program	1201167-0006J-6607	1200.26586.2002.660000.00000.0000J.5907.0000 Student Equity Program - Reserve
Activity	1100367-2191	1100.00000.4501.679000.40027.00000.2191.0000 Academic Lab Support - Ofd Reg.
	5100006-8848	5100.00000.7050.691000.10049.00000.8848.0000 Merchandise - Merchandise Sales
SubActivity	5100005-4860	5100.0000.7050.651000.10048.00000.4960.0000 Used Books - Used Book Purchas
Object	7600002-8981	7600.00000.4930.721000.10231.00000.8981.0000 Other Post Employment Benefits -
InterFund	1100747-2191	1100.00000.1410.677000.10221.00000.2191.0000, Publications Center - Citid Regular
Future1	Search	d Cinese Current

• Select Search.

Alias			Davic
		Sear	ch Reset
Alias	Combination	Description	
1201167-0000F-5807	1200.26586.2002.660000.00000.0000F.5907.0000	Student Equity Program - R	eserves
1201167-0000G-5907	1200.25586.2002.660000.00000.000005.5907.000	Student Equity Program - R	eserves
1201167-0000H-5907	1200 26586 2002 660000 00000 0000H 5907 000	Student Equity Program - R	aserves.
1201187-00001-5807	1290.26586.2002.660000.00000.00001.5907.0000	Student Equity Program - R	oserves
1201187-0000J-5907	1200.25585.2002.680000.00000.0000J.5907.0000	Bludent Equity Program - R	eserves
1100367-2191	1100.00000.4501.879000.40027.00000.2191.0000	Academic Lab Support - Ci	td Plegular
5100006-8848	5100.00000.7050.691000.10049.00000.8848.0000	Merchandise - Merchandise	Sales
5100005-4860	5100.00000.7050.591000.10048.00000.4668.0000	Used Books - Lised Book P	urchases
7600002-8981	7600.00000.4930.721000.10231.00000.8981.0000	Other Post Employment Be	nefts - OP
1100747-2191	1100.00000.1410.577000.10221.00000.2191.0000	Publications Canter - Cito F	logular No.

• Enter the alias in the Alias text field and the select **Search** to find the associate Oracle Account.



			>
I Search			Basic
Alias 5100005-48	60		
		Sea	rch Reset
Alias	Combination	Description	
5100005-4860	5100.00000.7050.691000.10048.00000.4880.0000	Used Books - Used Book	Purchases
			OK Cancel

J Search				B
Alias 7600002-898	1			
			Search	R
Alias	Combination	Description		
7600002-8981	7600.00000.4930.721000.10231.00000.8981.0000	Other Post Employ	ment Benefit	8-4
			ок	C

• Select the line to add and then select **Ok**.

The appropriate account segments will appear in the Charge Account window.

Alias	760000	72-89	381 🔹
Fund	7600	٠	Other Trust - OPEB
Source	00000	•	None
Organization	4930	•	General
Program	721000	1	Long Term Debt
Activity	10231	٠	OPEB
SubActivity	00000	•	None
Object	8981	•	Interfund Transfer In
InterFund	0000	•	Default
Future1	0000	٠	None
	Sea	rch	Reset OK Can

0



Search for or check the status of a Requisition by Requester, Requisition #, or Purchase Order

You can search requisitions in the system that have been created by you or another user. The Manage Requisitions page allows you to search for these requisitions by either the requestor name, requisition number, or purchase order number.

E DELTA COLLEGE 🎧 🕁 🌾 🖒		(E -
	Purchase My Receipts Requisitions	
Requisitions	More Tasks 👻 Manage Requisitions	W 1
Shop by Category -	Search 9	
Recent Requisitions SJD02229 Tmining Test Requisition Incomplete	Recent Purchases No data to display.	
Recently Viewed		_

• Select the Manage Requisitions link.



The Manage Requisitions page will appear.

wanage	Requisitions			/	Dgne
Search		Advanced	Manage Watchlist Saved Search	h Boquisitions I Ente	ered \$
	Requisitioning BU \$		Status AS	A	t least one is required
	** Entered By Eckert, Jennifer Q		Requester		9
/	** Requisition		Order		٩
11	Description	Requisition	s Requiring Attention \$		4
rch Results	Format 💌 🍯 🎵 🕎 🖉 Fronze 🔛 Detach 🚽 Wrap				
Requisition	Description	Creation Date	Approval Amount Status	Funds Status	Order
SJD02229	Training Test Requisition	9/9/18	1,500.00 USD Incomplete	Not reserved	
SJD00005	smoke test	7/1/18	0 Canceled	Not reserved	
	Columns Hidden 5				

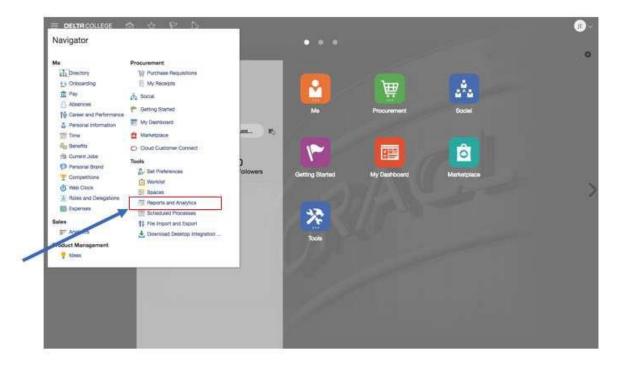
- Enter the following to search for a requisition:
 - A user name in the **Entered by** field will allow you to search for a requisition created by another user.
 - A requisition number in the **Requisition** field will allow you to search for a requisition by the requisition number.
 - A purchase order number in the **Order** field will allow you to search for a requisition by the purchase order number.
- Select Search once you have entered a field to search on. The results will display in Search Results section at the bottom of the page.

Status defined:

- o Approved: Requisition is in the purchasing queue for processing
- o Canceled: The requisition has been canceled
- o Incomplete: The requisition has not been submitted
- o Pending Approval: Requisition is pending Fiscal Officer approval
- o Returned: Requisition has been returned to requestor for correction



Access the Delta Actual Versus Budget Reports



• Select the **Reports and Analytics** link in the **Navigator** menu.

The Reports and Analytics page will appear.

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Note: Selecting the star next to the report will allow you to see favorites.



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• Select **All Folders** to view the folders in the system.

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• Select the Shared Folders folder.



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• Select the **Custom** folder.

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• Select the **Financials** folder.



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• Select the **Budget Versus Actual** folder.

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 Select either the Delta Budget Versus Actual or Delta Budget Versus Actual without Alias report.

Note: The Delta Budget Versus Actual without Alias report defines all accounts from all Business Units with or without budget, regardless of an Alias associated or not.

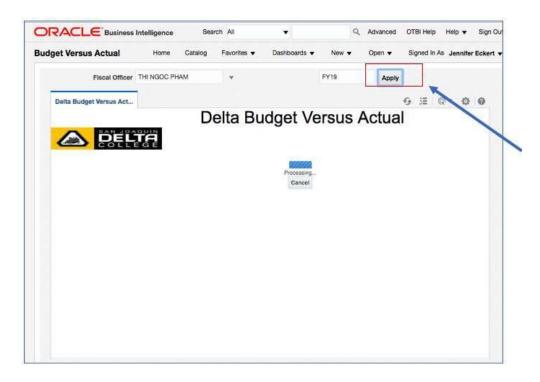
Note: Select the star to the left of the report name to save the report as a Favorite.



Note: Due to role permissions, you may or may not see the data in other reports displayed on the page.

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• Select the **Fiscal Officer** Dropdown to view accounts for the specified Fiscal Officer(s).



• Select Apply.



The Delta Budget Versus Actual Report will appear.

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The Delta Budget Versus Actual Report provides the following:

- **Fiscal Officer** name(s) names of those Fiscal Officers selected.
- Alias KFS account number and object code.
- Description description of the account
- Account Oracle account number, where the segments include:
 - Fund
 - Source
 - Organization
 - Program
 - Activity
 - Sub Activity
 - Object
 - Interfund
 - Future1
- **Budget –** Account budgeted amount.
- o Encumbered
- Actual
- Available
- o Available Percent
- Committed