

## Check Request Example

Be sure to review “When to use a check request” prior to submitting a check request. The policy on when to use a check request can be located by clicking the icon.



When to use a  
check request

**Step 1:** Go to RIAS Internet Procurement website “Shop” tab:

The screenshot shows the ORACLE iProcurement website interface. At the top, there are navigation links: Shopping Cart, Home, Logout, Preferences, and Help. Below these are tabs for Shop, Requisitions, and Receiving. The 'Shop' tab is highlighted with a red box. Underneath, there are sub-tabs for RU Internal and Exchange Suppliers, Categories, Shopping Lists, and Non-Catalog Request. The 'Non-Catalog Request' sub-tab is also highlighted with a red box. A search bar contains the text 'RU Internal Suppliers' and a 'Go' button. Below the search bar, a welcome message reads 'Welcome, Mushenski, Michael Richard! RU Internet Procurement'. The main content area is titled 'Shop RU Internal, Exchange and Contract Blanket Agreement Suppliers' and lists several suppliers: RU Internal Suppliers, Airgas Inc., CDW Government, Dell, Dupli, Fisher Scientific Company L.L.C., Miller's Rental, MSC Industrial Supply, Office Max, Inc., Sigma-Aldrich, VWR International, and Exchange.Oracle.com. On the right side, there are two yellow boxes: 'Shopping Cart' with the message 'Your cart is empty.' and 'Purchasing News' with two items: 'Check frequently asked questions' and 'Link to Purchasing'. Two arrows point from the text above to the 'Shop' and 'Non-Catalog Request' tabs.

**Step 2:** Select “Non-Catalog Request.”

Please Note: This is only an example

**Step 3:** Populate the information in the **example** below based on your specific business need. Be sure to select check request from the “Category” field below:

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

RU Internal and Exchange Suppliers | Categories | Shopping Lists | Non-Catalog Request

### Non-Catalog Request

\* Indicates required field

Clear All Add to Cart Add to Favorites

|               |                         |                    |  |
|---------------|-------------------------|--------------------|--|
| Supplier Name | Conferences and Seminar | Item Type          | Goods or services billed by amount           |
| Site          | FRAMINGHA-01 W9         | * Item Description | Valid Rutgers business justification/purpose |
| Contact Name  | Spiewak, Eric           | * Category         | %  |
| Phone         | 201 871-0474            | * Estimated Amount | 100  |
|               |                         | Currency           | USD  |

Clear All Add to Cart Add to Favorites

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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**Step 4:** Select “Add to cart” once all necessary information is populated.

**Please note:** In this example, the “Supplier name” field will be the name of the conference to be attended. Please use the % sign for various check request categories.

**Step 5:** Populate information to print on check stub based on your specific need.

ORACLE iProcurement Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

RU Internal and Exchange Suppliers | Categories | Shopping Lists | Non-Catalog Request

**Special Information** Internal and Exchange Suppliers Continue

Indicates required field

**Selected Line**

Your selection requires special information.

| Item Description                             | Unit      | Price | Supplier                       |
|--|-----------|-------|--------------------------------|
| Valid Rutgers business justification/purpose | US Dollar |       | 1 USD Conferences and Seminars |

**CR Check Request**

Information to print on check stub (20 char. max)

Continue

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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**Step 6:** Click the “Continue” button once you have populated all information.

Please Note: This is only an example

## Check Request Example

**Step 7:** Once information is populated, click “View cart and checkout.”

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Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

RU Internal and Exchange Suppliers | Categories | Shopping Lists | Non-Catalog Request

### Non-Catalog Request

Indicates required field

Supplier Name: Conferences and Seminar

Site: FRAMINGHA-01 W9

Contact Name: Spiewak, Eric

Phone: 201 871-0474

Item Type: Goods or services billed by amount

Item Description: Valid Rutgers business justification/purpose

Category: Check Request:Not Elsew

Estimated Amount: 100.00

Currency: USD

#### Shopping Cart

Your cart contains 2 lines.

| Recently Added Lines |        |      |
|----------------------|--------|------|
| Valid Rutgers...     | 100.00 | USD  |
| Hotels               | 1      | Each |

**View Cart and Checkout**

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Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Please Note: This is only an example

**Step 8:** Check the box to identify this transaction as a check request

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Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

### Shopping Cart

Save Checkout

| Line | Item Description                             | Special Info                     | Unit      | Quantity | Price | Amount (USD) | Supplier                 | Supplier Site   | Delete |
|------|--|----------------------------------|-----------|----------|-------|--------------|--------------------------|-----------------|--------|
| 1    | Valid Rutgers business justification/purpose | <a href="#">CR Check Request</a> | US Dollar | 100      | 1 USD | 100.00       | Conferences and Seminars | FRAMINGHA-01 W9 |        |
|      |  |                                  |           |          |       | Total        | 100.00                   |                 |        |

CHECK HERE FOR QUICK ORDERS (\$5000 limit) AND CHECK REQUESTS ONLY. DO NOT check this box if using an RU Exchange Supplier or if entering an IPO or if supplementing an existing PO.  
 TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#)

Save **Checkout**

Shop | Requisitions | Receiving | **Shopping Cart** | Home | Logout | Preferences | Help

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**Step 9:** Click "Checkout."



## Check Request Example

**Step 10:** Populate the special check handling field if applicable (use flashlight if needed). This field will determine the location that the check will be delivered. If this field is left blank, then the check will be mailed to the vendor's address.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Checkout: Requisition Information

\* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

\* Requisition Description Valid Rutgers business justification/purpose  
NOTE: Please remember to change the default requisition description.

Special Check Handling?

Delivery

\* Need-By Date 28-May-2013 00:00:00  
(example: 22-Apr-2013 19:45:00)

\* Requester Mushenski, Michael Rich

\* Deliver-To Location CCC 6006 109   
Enter one-time address

Billing

Taxable No

Charge Account 00-000000-000000-000000-000000-000

GL Date 07-May-2013

Cancel Save Submit Edit Lines Step 1 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

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**Step 11:** Deliver to location will be populated automatically.

Please Note: This is only an example

**Step 12:** Click on “Charge account” to fill out the appropriate funding source detail.

ORACLE iProcurement

Shopping Cart Home Logout Preferences  
Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

**Checkout: Requisition Information**  
\* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

\* Requisition Description Good business justification  
NOTE: Please remember to change the default requisition description.

Special Check Handling?

**Delivery**

\* Need-By Date 07-May-2013 00:00:00  
(example: 16-Apr-2013 19:45:00)

\* Requester Mushenski, Michael Rich

\* Deliver-To Location CCC 6006 109  
[Enter one-time address](#)

**Billing**

Taxable No  
Charge Account 00-000000-00000-000000-000000-000  
GL Date 16-Apr-2013

Cancel Save Submit Edit Lines Step 1 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

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Please Note: This is only an example

**Step 13:** Click on the charge account again to open the editing screen.

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Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

**Requisition Information: Edit Lines** Return

\* Indicates required field

Delivery Accounts Attachments

Select Lines: Update Copy Delete

Select All | Select None

| Select Line                | Item Description | Charge Account                   | GL Date     | Split |
|----------------------------|------------------|----------------------------------|-------------|-------|
| <input type="checkbox"/> 1 | RNA Sequencing   | 00-000000-00000-00000-000000-000 | 04-Apr-2013 |       |

TIP Click on a Split icon to allocate costs to multiple accounts.

Delivery Accounts Attachments Return



### Charge Account structure breakdown

- 00-XXXXXX-YYYYY-ZZZZZ-000000-0
- “X” denotes the funding source
- “Y” denotes the organization code
- “Z” denotes the natural account
- Ensure fund source and department activity 1 (project) are active and appropriate for type of expense

The screenshot shows the Oracle iProcurement interface for a Requisition Information page. The page title is "Requisition Information: Split Cost Allocation". Below the title, there is a "Selected Line" section with a table showing one line item: "1 RNA Sequencing" with a unit of "Each" and a price of "10 USD".

Below the line item, there is a "Charge Accounts" section. The main table has the following columns: Line, RU Accounting Flexfield, GL Date, Percent, Quantity, Amount (USD), Department Activity 1, Department Activity 2, and Delete. The data for line 1 is as follows:

| Line  | RU Accounting Flexfield        | GL Date     | Percent | Quantity | Amount (USD) | Department Activity 1 | Department Activity 2 | Delete |
|-------|--------------------------------|-------------|---------|----------|--------------|-----------------------|-----------------------|--------|
| 1     | 00-000000-00000-00000-000000-0 | 04-Apr-2013 | 100     | 10       | 100.00       |                       |                       |        |
| Total |                                |             | 100     | 10       | 100.00       |                       |                       |        |

Below the table, there are two checkboxes: "TIP Total allocation must equal 100% of the selected line values." (checked) and "Apply this Cost Allocation information to all applicable requisition lines." (unchecked). Arrows in the image point from the highlighted fields in the table to the corresponding fields in the "Step 14" instruction below.

**Step 14:** Populate the “RU Accounting Flexfield” and “Department Activity 1 (project) and 2 (subcode)”, see detail above:

Please Note: This is only an example

**Step 15:** Attach appropriate documentation to support the check request. Please see “When to use a check request” for appropriate listings of support.

ORACLE iProcurement Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

**Requisition Information: Edit Lines** Return

\* Indicates required field

Delivery Accounts Attachments

**Requisition Attachments**

Add Attachments

| File Name         | Type | Description | Update | Delete |
|-------------------|------|-------------|--------|--------|
| No results found. |      |             |        |        |

**Requisition Line Attachments**

| Line | Item Description            | Unit | Quantity | Price   | Amount (USD) | Attachments |
|------|-----------------------------|------|----------|---------|--------------|-------------|
| 1    | Good business justification | Each | 1        | 100 USD | 100.00       | +           |

✓ TIP Click on an Attachment icon to add or update attachments for a particular line.

Delivery Accounts Attachments Return

Shop Requisitions Receiving Shopping Cart Home Logout Preferences

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**Please note:** If you attach support using the “Requisition line attachment” icon, the support will be attached on the line item. If you use “requisition attachment” icon the support will be attached to the front page of the requisition.

**Step 16:** Add the approver, check with your supervisor to determine appropriate approver, and note to approver and buyer as appropriate. **Note that your FINAL approver will be your business office accountant:**

**ORACLE iProcurement** Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisition Information **Approvers** Review & Submit

**Checkout: Review Approver List**

Your requisition will be sent to the following list of approvers. Save Submit Back Step 2 of 3 Next

**Change First Approver**

| Approver Name  | Delete |
|----------------|--------|
| Green, Janet S |        |

Note To Approver

Note To Buyer

If you have selected "Services" as your category and an independent contractor will provide the service, please complete and attach the REQUEST FOR CONSULTING OR INDEPENDENT PERSONAL SERVICES CHECKLIST form (RCIPS) located on the RIAS Forms Repository.

**Attachments**

| File Name | Type | Description | Update | Delete |
|-----------|------|-------------|--------|--------|
| CR.S.jpg  | File | testing     |        |        |

Save Submit Back Step 2 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

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**Please note:** Your attachment will also appear on this screen if you need to update the information.

## Check Request Example

**Step 17:** Once all the information has been entered and reviewed, click on "Submit."

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○ ○ ●  
 Requisition Information   Approvers   **Review & Submit**

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**Checkout: Review and Submit Requisition**

  
    
    
 Step 3 of 3  

**Requisition 1867135: Total 100.00 USD**

Created By \_\_\_\_\_ Approval Total **100.00**  
 Creation Date **04-Apr-2013 14:08:45** Quick Order / Check Request PO # \_\_\_\_\_  
 Description **Good business justification**  
 Note To Approver \_\_\_\_\_

**Requisition Attachments**

| File Name                | Type | Description | Update | Delete |
|--------------------------|------|-------------|--------|--------|
| <a href="#">CR.5.jpg</a> | File | testing     |        |        |

**Lines**

| Details                | Line | Item Description            | Cost Center | Unit | Quantity | Price(USD) | Amount (USD)  | Category                            | Supplier                 |
|------------------------|------|-----------------------------|-------------|------|----------|------------|---------------|-------------------------------------|--------------------------|
| <a href="#">▶ Show</a> | 1    | Good business justification | 00000       | Each | 1        | 100 USD    | 100.00        | Check Request:Not Elsewhere Defined | Conferences and Seminars |
| <b>Total</b>           |      |                             |             |      |          |            | <b>100.00</b> |                                     |                          |

  
    
    
 Step 3 of 3  

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