Oracle Finance
Procurement:
Non-Catalog Requisitions & POs

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What We Will Cover

- Introduction to Procurement
  - Procurement Concept
  - Workflow Chart
- Navigating Oracle
  - General Navigation
- Chart of Accounts
- Set Preferences
- Supplier Registration
- Non-Catalog Requisitions
  - Guest Speakers
  - Approved Supplier List
- Procurement Approvals
- Purchase Orders, Change Orders & Follow-Up
- Resources
- Questions
Introduction to Procurement

What is Procurement?

The act of strategically sourcing goods or services for an organization. Basically it’s professional purchasing!
Procurement Workflow Chart

Can I buy my goods/services through one of our PunchOuts? (Amazon, B&H Photo, Fisher Scientific, W.B. Mason)

   Yes
      Buy it with your P-Card! Don’t forget to reconcile!

   No
      Can I order it on a P-Card?

Yes

   Yes
      Log into Oracle and place your PunchOut order!

   No
      No

No

   No
      *Is your supplier on the PO Supplier list or a Guest Speaker?
      (INSERT LINK)

   Yes
      Log into Oracle and enter your request for purchase (requisition)

Place the order directly and have the invoice sent to you for entry into Oracle for payment
Oracle Purchasing Definitions

- **A REQUISITION** is an electronic Oracle document that employees fill out to request a new purchase.

- **A PURCHASE ORDER**, or PO, is a formal document issued in Oracle. It specifies – per the requisition – the types, quantities, and prices for the goods and/or services the supplier (the seller) will provide the Business Unit (the buyer).

- Differences:
  - A requisition remains an internal document requesting your order.
  - PO (after approval if applicable) will be released to the supplier to fulfill the order.

- Refer to your Oracle Procurement Glossary should you have any questions.
Let's go to Oracle and follow these steps:

1. Go to the Procurement Tab
2. Choose Purchase Requisitions
3. Go to the “More Tasks” dropdown
4. Choose “Update Requisition Preferences”

Set defaults for:
- Shipping & Delivery
- Billing

And
- Create Favorite Charge Accounts
Important Note on Delivery

ALWAYS
Double-check your Deliver-To and Billing information whenever performing a Self-Service Procurement action.
You may not want to use your default.
Supplier Registration
Supplier Registration – Section 2.0

▪ Search
  ❑ Before you buy, is this supplier already in Oracle?

▪ Request
  ❑ Complete the supplier registration form in Oracle
  ❑ When using a new vendor visit the Better Business Bureau: www.bbb.org. You can search your vendor to verify they are a reputable and legitimate supplier.

▪ Validated (by AP)

Let’s Go
Non-Catalog Purchasing

Non-Catalog Requisitions – Section 4.0
Non Catalog Requisitions Misc. – Section 4.0a

Requisitions:
▪ Create & Submit
▪ Cancel
▪ Withdraw & Edit

When we’ll use this module:
▪ Guest Speakers
▪ Approved Suppliers

Let’s Go
Purchase Orders & Follow-Up

Purchase Order – Section 6.0
Purchase Order Miscellaneous – Section 6.0a

- **Purchase Order Creation**
  - Non-Catalog – PO is created when using negotiated button
    - Order is placed electronically if supplier has an email in Oracle
    - If no email, PDF of the PO must be saved or printed and sent to supplier via email, fax, or mail

- How do I search for my requisition and/or PO?
- What if I have changes?

*Let’s Go*
Procurement Approval Flow
Procurement Approvals – Section 7.0

Goods/Services < $500.00
Requisition Submitted
PO auto-created (If negotiated button checked) & auto-approved

Goods/Services ≥ $500.00
Requisition Submitted
PO auto-created (If negotiated button was checked)
PO goes out for approval
Procurement Approvals
Procurement Approvals – Section 7.0

- **Who**
  - Cost Center/Budget Managers or P.I.’s

- **What**
  - Purchase Orders equal to or over $500.00
  - Change Orders over 10% or $10,000

- **When**
  - Upon Receipt

- **Why**
  - Checks/Balances/Transparency

What do they look like?
Managing Notifications

Outlook Email Rules

Google Email Rules
https://support.google.com/mail/answer/6579?hl=en
Resources

- Procurement Glossary of Terms
- *Tentative* Virtual Drop-in Hours
  - M/W/F 3:00 – 5:00 (times may change)
  - Zoom Link: https://middlebury.zoom.us/j/8024435800
- Web Portal
  - Follow me on the Oracle Social App
  - Oracle → Other → Social App
- Reference Guides
- Videos
Questions? Email me at cheryl.foster@gmhec.org