



Oracle Finance Procurement: Non-Catalog Requisitions & POs

February, 2019

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

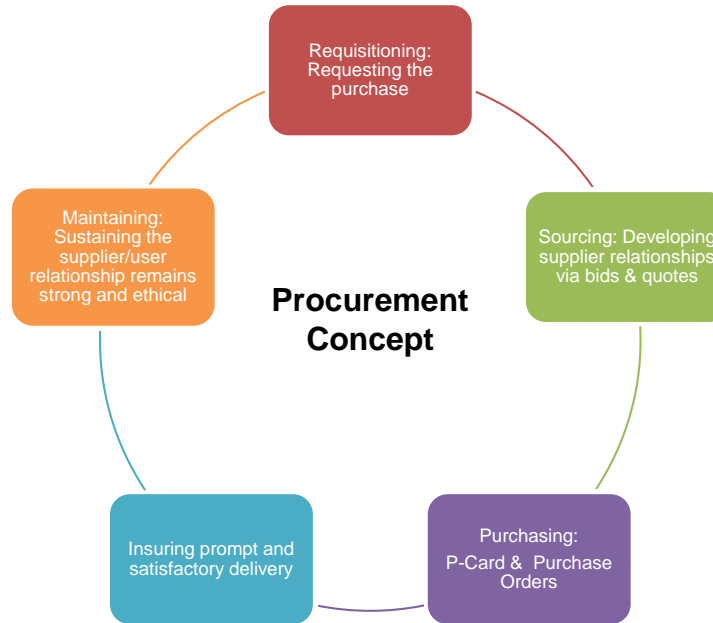


Introduction to Procurement

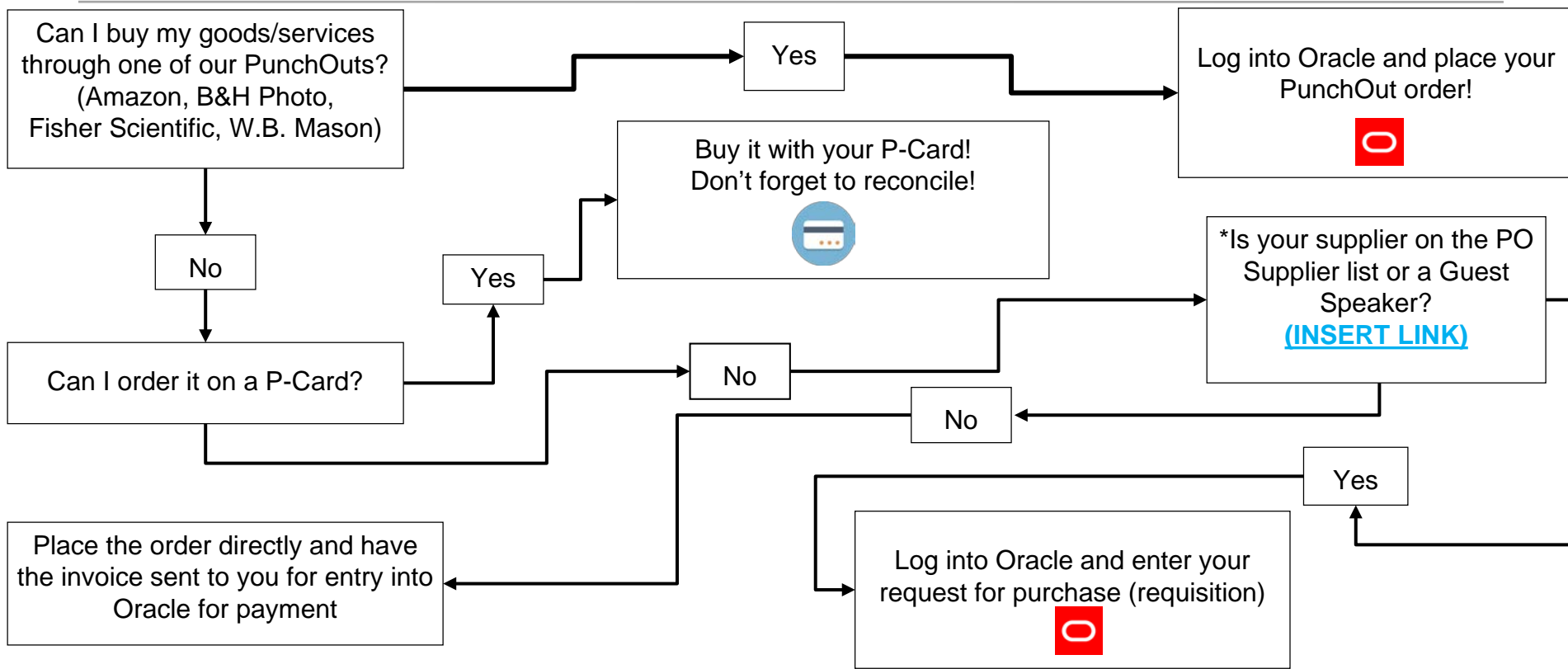


What is Procurement?

The act of strategically sourcing goods or services for an organization. Basically it's professional purchasing!



Procurement Workflow Chart



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

Set Preferences

Set Preferences – Section1.0



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

Edit Requisition Preferences

Select the requisitioning BU where your preferences will be applicable.

Requisitioning BU: GMHEC BU

Shipping and Delivery

* Requester: Foster, Cheryl

* Deliver-to Location: Middlebury, VT - Main Campus

Destination Type: Expense

Billing

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
No data to display.			

Save and Close Cancel

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

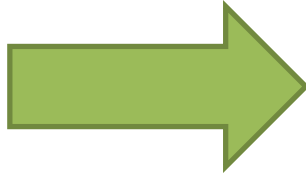
Non-Catalog Requisitions – Section 4.0

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

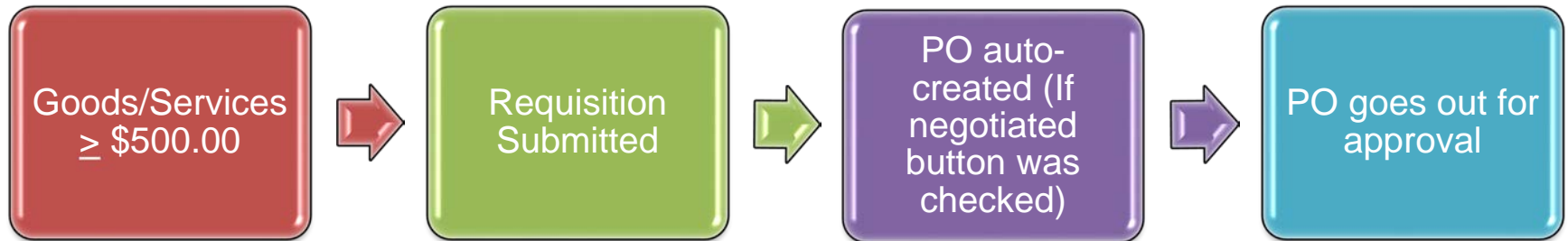


- Purchase Order Creation
 - Non-Catalog – PO is created when using negotiated button
 - Order is placed electronically if supplier has an email in Oracle
 - If no email, PDF of the PO must be saved or printed and sent to supplier via email, fax, or mail
- How do I search for my requisition and/or PO?
- What if I have changes?

Let's Go

Procurement Approval Flow

Procurement Approvals – Section 7.0



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

<https://support.office.com/en-us/article/manage-email-messages-by-using-rules-c24f5dea-9465-4df4-ad17-a50704d66c59>

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

