The following processes will be utilized in this reference guide:
1. Supplier Approval
2. Supplier Edit

AP/Finance Process: Register (request) → Approval

Audience: Accounts Payable

### Additional Resources:
- [https://www.gmhec.org/procurement-knowledge-base/](https://www.gmhec.org/procurement-knowledge-base/)
- cheryl.foster@gmhec.org

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
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| Approvers will receive approval request both in email and in Oracle. | ➢ Approve via Email
➢ Approve via Oracle |
| Accounts Payable must reference the AP checklist when approving and editing a supplier. |

To approve by email, simply click “Approve”, “Reject”, or “Request More Info”:
- Approve – validates supplier. Notification sent to requester. You will still need to edit supplier information. Supplier will be able to do business with institution.
- Reject – supplier rejected. Notification sent to requester. Supplier will not be able to do business with institution.
- Request More Info – supplier neither approved nor rejected. Approver is asking for more information before making a decision. EX. – W-9 not supplied. Approver is asking requester to attach the W-9.

![Suppliers Registration Request screenshot](image_url)
Approving via Oracle:

Go to your home page, and click on notifications:

A pop-up will appear:

Options:

1. Click on the approve button as show in the pop-up. Here, you can approve immediately from the notifications window:

2. Review the document by clicking on the supplier link in the pop-up:

Quick Tip!
Remember to enable your pop-ups for use in Oracle.
Click on the Approve or Reject button in the top right corner of the screen when ready.

If a decision was made, the requester will receive notice that their supplier has been approved or rejected.

Similar to “Request More Info” in requisitions, you can “Request to Resubmit” if any information is missing or needs to be corrected.

The following pop-up will appear:

Fill in the Reason field and click “OK”. A notification will be sent to the requester, and they can resubmit request.
2.2a Searching for Supplier to Edit

End users only add basic information. There are pieces in the supplier file that we need completed by a professional in Finance/AP in order to have a complete record.

Search for your supplier:
1. Go to the Supplier module
2. Click the search icon in the Supplier module
3. Search in the search field or click "Advanced" for an advanced search

Quick Tip! You only need to use one field with a double asterisk to search.
Find your supplier and click on vendor record.

**Quick Tip! For individuals, search by last name**

Navigation Path:
➢ Procurement ➔ Suppliers ➔ Edit Supplier

When you click on the supplier’s record, you are now able to edit your supplier’s information.

For AP/Finance Review:
1. Confirm W-9 is attached. If so, it would show under the attachments area. In the above case, the W-9 has not been attached.
2. Rename Site
3. Add Bank Account (ACH)/Payment Information
4. Verify Site Assignment
5. Add “Alternate Name” if needed
Navigation Path:
➢ Procurement ➔ Suppliers ➔ Edit Supplier

Click on the “Sites” tab

Click on the Site name defaulted to “City-1” – in the case above it has been defaulted to “Sparks-1”. Maximum character limit is 15 spaces.

Change the Site name (depending on institution)

**Site Name Formula:**
CC-City-1 (Champlain)
GM-City-1 (Consortium)
MD-City-1 (Middlebury)
SM-City-1 (Saint Michael’s)
2.5a Add Bank Account Information

Navigation Path:
➢ Procurement → Suppliers → Edit Supplier

Click on the Sites tab:

Click on your Procurement BU site:

Add Payment information

On the site level of the Edit Supplier page, scroll down and choose the Payments tab, and then the Bank Accounts tab

Under “Bank Accounts” click on the “External Bank Account” icon

The “Create Bank Account” pop-up will appear
In this "Create Back Bank Account" page:
1. Select Country
2. Enter Account Number
3. Under Bank Name choose “External”

Under “Branch” search and choose your routing number
If you cannot find the routing number, contact your local Oracle Cash Manager to have it added.

**Navigation Path:**
➢ Procurement ➔ Suppliers ➔ Edit Supplier

On the Edit Supplier page, scroll down and choose the “Site Assignments” tab

The Client BU should be defaulted to your Business Unit. If not, choose your Business Unit under the “Bill-to-BU” dropdown.

Sometimes the bill-to location is not added. If needed, add the bill-to location.
Scroll back up and click “Save and Close”.

Navigation Path:
➢ Procurement → Suppliers → Edit Supplier

In order for the correct name to be printed on the check, you will need to add an “Alternate Name.”

Alternate Name used if:
- Supplier is an individual; their “Company” name is Last Name, First Name. You will need to add their alternate name so the check would print as First Name Last Name.
- DBA is used and using parent company name.

On the profile tab of your supplier add in the name to be printed on the check in the Alternate Name” field:

Click “Save and Close”. The following pop-up appears confirming your changes.

Navigation Path:
➢ Procurement → Suppliers → Tasks → Manage Registration Requests

One way you can manage registration requests is by using this task. Go to the suppliers module, click the tasks icon, and choose “Manage Registration Requests”:
Choose a Procurement BU and select “Pending Approval”:

Click search and all of your pending approval vendors will appear.

Under “Approval Status” you can also find vendors with the following status:

Under “Supplier Creation Status” you can also find vendors with the following status:

Quick Tip! Use Manage Registration Requests when troubleshooting suppliers that can’t be found via normal supplier search.