PunchOut Requisitions – Section 3.0

This process will be used to order goods and services via supplier enabled “PunchOut” systems. Requisitions will follow a workflow and approval path prior to final purchase.

Additional Resources:
- Video (where applicable – insert link)
- Help Text (where applicable – insert link)
- GMHEC Website (where applicable – insert link)
- cheryl.foster@gmhec.org

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation Path:</td>
<td></td>
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<tr>
<td>➢ Procurement → Purchase Requisition</td>
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<tr>
<th>Me</th>
<th>Sales</th>
<th>Contract Management</th>
<th>Payables</th>
<th>Procurement</th>
<th>My Enterprise</th>
</tr>
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**Quick Tip!** PunchOut suppliers are already approved.

Scroll down to “Top Categories” where all of the available Punch-Out suppliers are listed. Click on chosen supplier.
Search for and select an item(s) from the B&H website and “Add to Cart”. Repeat as necessary.

(In this instance we are using B&H Photo.)

Each of these punch-out instances will direct you to the supplier's outside B2B website. From the website you will shop as you would with any other website.
Quick Tip! Always enable your pop-ups in Oracle

When reviewing your cart, note that the “Check-Out” button has been replaced with “PunchOut.”

Press the “PunchOut” button when you are ready to submit your order back to Oracle for processing.

For other PunchOut suppliers it may simply say “Checkout” instead of “PunchOut.” Amazon’s button says “Submit these Items For Approval.”

The PunchOut supplier’s website will close, and you will be automatically taken back to Oracle to review your requisition lines.

Quick Tip! Highlight your line item to make edits or remove an item you no longer want. Select “Actions” to create the corresponding act.
Scroll down and complete/review/confirm fields.

- Add your name under “Suggested Buyer” – Last Name, First Name

Line 1: Details

Delivery

* Requester Foster, Cheryl

Urgent No

Requested Delivery Date 18-Mar-2019

* Suggested Buyer

• Confirm your Delivery Location! Change your “Deliver To Location” if needed.

Delivery

* Requester Foster, Cheryl

Urgent No

Requested Delivery Date 15-Feb-2019

* Deliver-to Location

Middlebury, VT - Main Campus

122 Maple Street, MIDDLEBURY, VT 05753, UNITED STATES

IMPORTANT NOTE:

Each line item carries its own distribution – if charges need to be modified, you will need to click on each line item and go to its distribution for changes.

• Billing – Review your billing information and correct if necessary by clicking on the Charge Account icon

• The Charge Account pop-up will appear, and all account editing can be done.
• Split Billing – To split charges between multiple Cost Centers:
  1. Click the button indicating split (looks like a wishbone!)
  2. In the case below, the order is split between 3 Cost Centers. However, you can do as little as 2 to as many as needed.
  3. You can split by Percentage or Amount.
  4. Save Changes.

Add the Designation:
• Your designation will most likely be “000000 – None”
• You will be notified by your Finance Team should you have a designation other than 000000
After reviewing your cart, click “Submit” in the upper right-hand corner:

A pop-up box will inform you that your requisition was confirmed. Click “OK”.

Your requisition will be processed into a purchase order.
- If your order is $500.00 or less, your order will be auto-approved and sent to the supplier.
- If it’s equal to or more than $500.00, your order will be sent for approval by your budget/cost center manager. Once it’s approved, the PO will be sent to your supplier!

Purchase Order Modifications – should you have shipping or taxes you will have to create a change order to add lines. See Reference Guide “Purchase Orders Misc. – 6.0a” for assistance on how to create a change order.

Shortly after your goods have been received, you will receive an invoice. Enter your invoice in Oracle to process payment. For more information on invoicing, see your local Finance Team or visit the Finance Knowledge Base on the GMHEC website.