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.

Audience: All

Additional Resources:
- Video
- Procurement Knowledge Base
- cheryl.foster@gmhec.org or procurement@gmhec.org
- Contact your local helpdesk

<table>
<thead>
<tr>
<th>Process Step &amp; Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3.1 Create Requisition from PunchOut Site</strong></td>
<td></td>
</tr>
</tbody>
</table>

Navigation Path:
➢ Procurement → Purchase Requisition

Scroll down to “Top Categories” where all of the available Punch-Out suppliers are listed. Click on chosen supplier.

Quick Tip! Always enable your pop-ups in Oracle.
(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.

Search for and select an item(s) from the B&H website and "Add to Cart". Repeat as necessary.
Quick Tip! Highlight your line item to make edits or remove an item you no longer want. Select "Actions" to create the corresponding act.

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 you automatically be taken back to Oracle to review your requisition lines.
Scroll down and complete/review/confirm fields.

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

Your Name Here:
Search by your last name first.

If you do not add your name as the Suggested Buyer, you will not be able to access your purchase orders. Please add your name so you can search for it, look up the approval status, and create any changes. If you are not able to find your name, please contact your local helpdesk.

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

If you need to change your deliver-to location, click the search icon in the “Deliver-to Location” field. A pop-up similar to the one when you set your deliver-to preference appears. The same search functionality applies. See reference guide “Set Preferences – Sections 1.0” on how to search for a location.

The deliver-to locations were provided by each member institutions’ Human Resources department, as well as W.B. Mason for desktop delivery. If you cannot find the location you are looking for, please contact your local helpdesk.
• 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.

Quick Tip! Refer to your EDORDA training or contact your school’s finance team for more information on Charge Accounts.

• 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.

**IMPORTANT NOTE:**
Each line item carries its own distribution, deliver to location, and suggested buyer – please click on each line item to confirm the above.
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 with the following approval flow:

3.2 Approval Flow

- Goods/Services < $500.00
  - Requisition Submitted
  - PO auto-created & auto-approved
  - PO is electronically sent to the PunchOut Supplier

- Goods/Services > $500.00
  - Requisition Submitted
  - PO auto-created
  - PO goes out for approval
  - PO is electronically sent to the PunchOut Supplier
<table>
<thead>
<tr>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>For steps on how to find your PO’s approval status, please see reference guide “Purchase Orders - 6.0” for detailed instructions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Purchase Order Modifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Matched Invoices</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>