

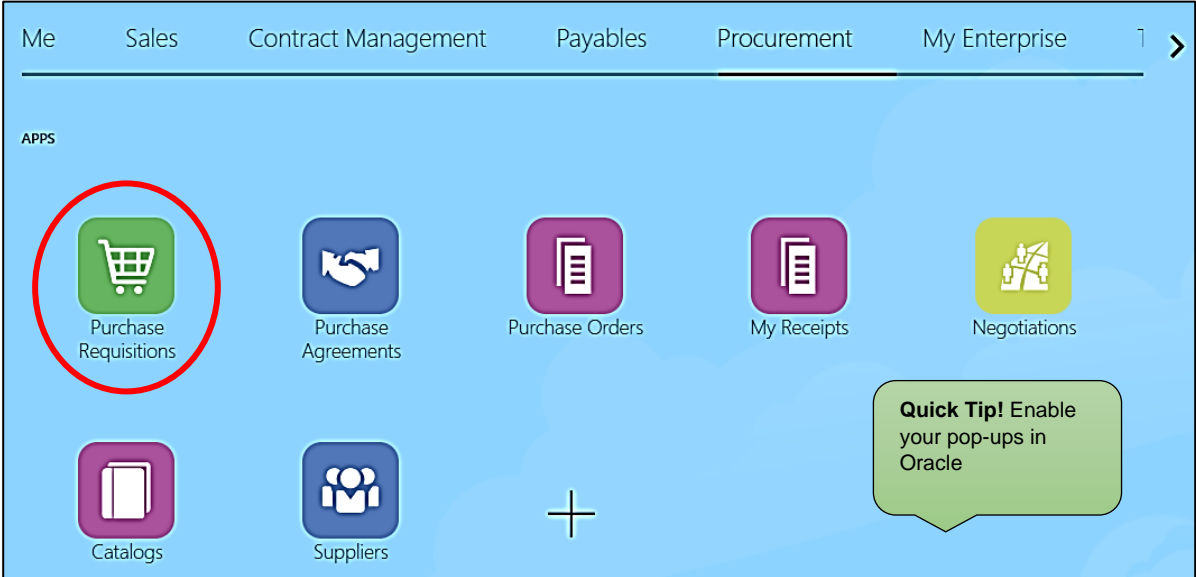
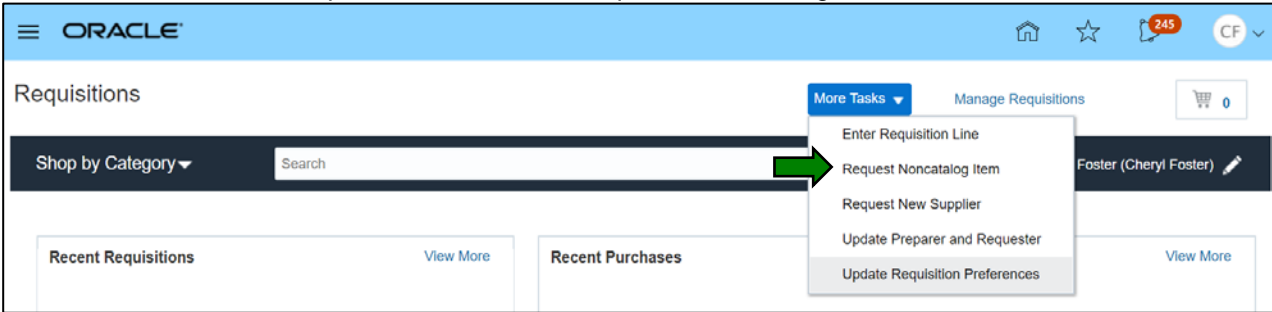
Non-Catalog Requisitions – Section 4.0

This process will be used to request goods or services for non-catalog, non-PunchOut items. This is used for vendors on the [approved PO supplier list](#), or for guest speakers.

Audience: All

Additional Resources:

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

Process Step & Description	Action
<p>4.1 Go to Purchase Requisitions and Enter Basic Information</p>	<p>Navigation Path: ➤ Procurement → Purchase Requisitions</p>  <p>The screenshot shows the Oracle Procurement Home Page. The 'Purchase Requisitions' app icon is circled in red. Other visible icons include Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers. A 'Quick Tip!' bubble is present in the bottom right corner of the screenshot.</p> <p>Under the “More Tasks” dropdown box, choose “Request Non-Catalog Item”</p>  <p>The screenshot shows the Oracle Requisitions page. The 'More Tasks' dropdown menu is open, and 'Request Noncatalog Item' is highlighted with a green arrow. Other options in the menu include 'Enter Requisition Line', 'Request New Supplier', 'Update Preparer and Requester', and 'Update Requisition Preferences'.</p>

Enter Item Description, Category Name, Amount, Currency, and Supplier:

Create Noncatalog Request

<p>Item Type: Goods or services billed by quantity ▼</p> <p>* Item Description: Cogswell Cogs</p> <p>* Category Name: Supplies</p> <p>* Quantity: 10</p> <p>* UOM Name: EA</p> <p>* Price: 10.00</p> <p>* Currency: USD</p> <p><input checked="" type="checkbox"/> Negotiated</p>	<p><input type="checkbox"/> New supplier</p> <p>Supplier: Grainger Inc.</p> <p>Supplier Site: GM Palatine-1</p> <p>Supplier Contact: ▼</p> <p>Phone: _____</p> <p>Fax: _____</p> <p>Email: _____</p> <p>Supplier Item: _____</p>
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Please consult notes below while completing your requisition:

- Goods or services billed quantity – Screen will default with quantity and unit price.
- Goods or services billed by amount – Total cost is in one lump sum. Quantities are not taken into consideration.
- Click the “**Negotiated**” box when you are certain of the total cost of your requested purchase. This will enable your requisition to be electronically created in Oracle. *If you do not click negotiated, your PO will not be auto-created.* See reference guide [Purchase Orders – Section 6.0](#) if negotiated was not clicked and requisition was submitted.
- The “Item Description” field is a free text field.

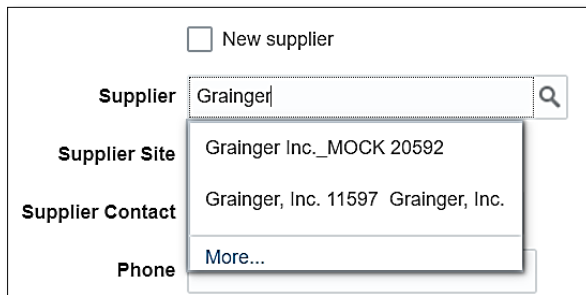
Please see your Procurement Glossary for further details on:

- Item Type
- Category Name
- Supplier Site

Navigation Path:

➤ Procurement → Purchase Requisitions → Supplier Search Pop-Up Box(es)

To search for your supplier, enter your supplier name and hit the search icon.

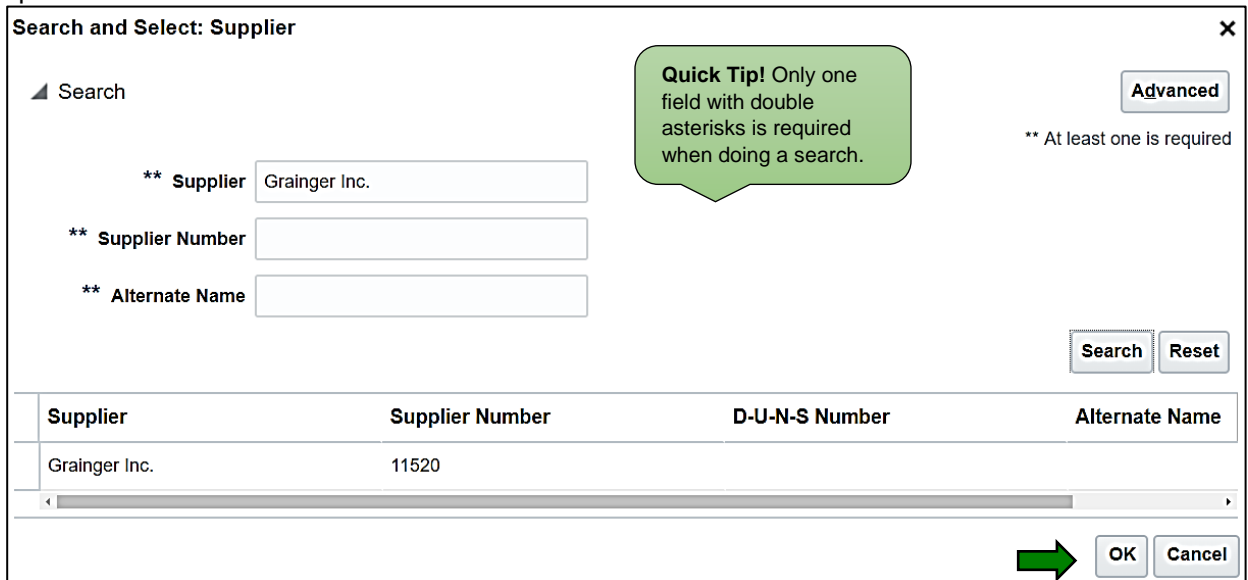


New supplier
 Supplier: Grainger|
 Supplier Site: Grainger Inc._MOCK 20592
 Supplier Contact: Grainger, Inc. 11597 Grainger, Inc.
 Phone: More...

Oracle may recognize your supplier immediately, and will pull up the supplier you are searching for.

Quick Tip! Fields with an asterisk are required to save your work.

Alternatively, you can do an advanced search and click the search icon. In which case, the following will pop up:



Search and Select: Supplier [X]

** At least one is required

Supplier	Supplier Number	D-U-N-S Number	Alternate Name
Grainger Inc.	11520		

Quick Tip! Only one field with double asterisks is required when doing a search.

4.2 Supplier Search

If you cannot find your supplier, you may have to register them. Please see reference guide "[General Supplier Registration – 2.0](#)" for instructions on how to request a new supplier.

When you find your supplier, highlight it and click "OK".

After choosing your supplier, the Supplier Site will automatically populate. If it does not populate, please click the down button and choose a site based on your Business Unit. Without a site, you may receive an error.

Quick Tip! Leading Wild Cards are an option. Simply add a % at the end of supplier name to search!

Navigation Path:

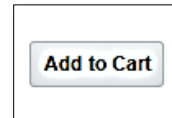
➤ Procurement → Purchase Requisitions

Under Attachments, you can also add contracts/agreements, quotes, email correspondence, or any other information you may find helpful to request your goods or services. Click on the “+” icon to add a file. Choose your file and upload it to Oracle. To remove a file, highlight your upload line and hit the “X” button.

If you are creating a requisition for an Independent Contractor, like a Guest Speaker, please attach their contract here.

Type	Category	* File Name or URL	Title	Description	Attached By	Attached
File	Internal to Rec	Choose File No file chosen			Cheryl Foster (...)	11-Feb-20

When completed, click “Add to Cart” located on the top right-hand corner:



You may have multiple requisition line items. Repeat steps as necessary.


When completed, click on the Cart icon.




Quick Tip! If you hit submit instead of review, you may be subject to an incomplete/error message! Please review your cart prior to submission!

4.3 Complete Form & Review

A pop-up will appear. Choose the “Review” button:

Add to Shopping List
Add to Cart
Done
 1



Cogswell Cogs
\$10.00 EA

10

✕

Total \$100.00

Review
Submit

Navigation Path:

➤ Procurement → Purchase Requisitions → Non-Catalog Request → Shopping Cart

Edit Requisition: GM-REQ-1274 Shop Check Funds Manage Approvals View PDF Save Submit

Requisitioning BU GMHEC BU Justification Requisition Amount 100.00 USD

* Description Cogswell Cogs Emergency purchase order number required Approval Amount 100.00 USD

Funds Status Not reserved

Attachments None +

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Line Type	Item	Revision	Description	Category Name	* Quantity	UOM Name	Price	Price (U
1	Goods	Cogswell Cogs		Cogswell Cogs	Supplies	10	EA	10.00 USD	10
Total									

Rows Selected 1

Line 1: Details

Delivery

Review & Correct Information if Necessary:

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

4.4 Review & Submit Shopping Cart

Line 1: Details

Delivery


* Requester Foster, Cheryl

Urgent No

Requested Delivery Date 18-Mar-2019

* Suggested Buyer

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.

- Ship-To Confirmation – **Confirm your delivery point! Your default delivery may not be where you want your goods shipped to.**

▲ Delivery

* Requester

Urgent

Requested Delivery Date

* Deliver-to Location

Deliver-to Address

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.

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.

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

Charge Account Nickname Charge Account

Supplies 101-1100-46011-10-000000-00000-000000

- The Charge Account pop-up will appear, and all account editing can be done here.

Charge Account ✕

Hide Segments

Entity Green Mountain Higher Education Consortium, Inc.

Department Shared Services

Object Supplies

Restriction Unrestricted

Designation Default

Activity Default

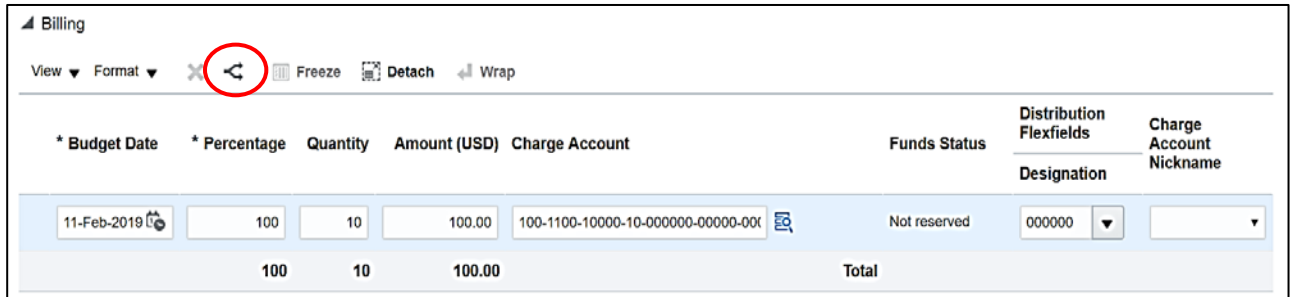
Intercompany Default

Future1 Default

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

Click “OK” when your charge account information is completed/updated.

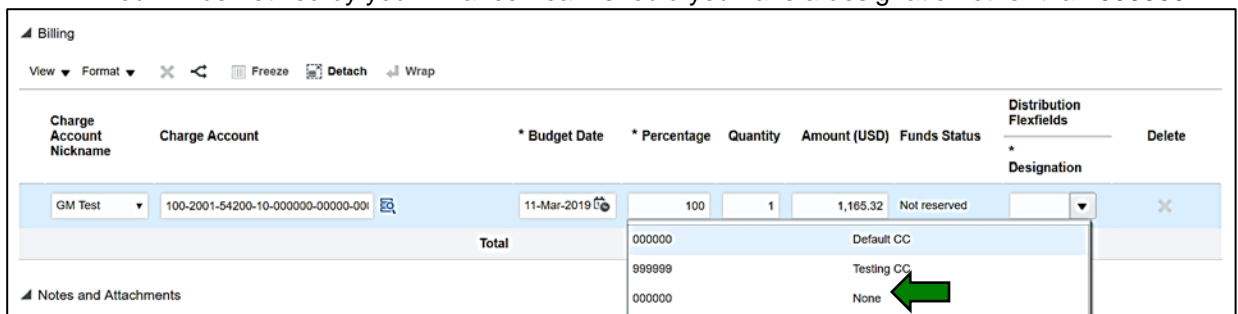
- Split Billing – To split charges between multiple Cost Centers:
 1. Click the button indicating split (looks like a wishbone!)
 2. In the case below, the order is split between 3 Cost Centers. However, you can do as little as 2 to as many as needed.
 3. You can split by Percentage or Amount.
 4. Save Changes.



* Budget Date	* Percentage	Quantity	Amount (USD)	Charge Account	Funds Status	Distribution Flexfields	Charge Account Nickname
11-Feb-2019	100	10	100.00	100-1100-10000-10-000000-00000-000	Not reserved	000000	
			Total				

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



Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields	Delete
GM Test	100-2001-54200-10-000000-00000-000	11-Mar-2019	100	1	1,165.32	Not reserved	000000	X
			Total					

Designation dropdown options:

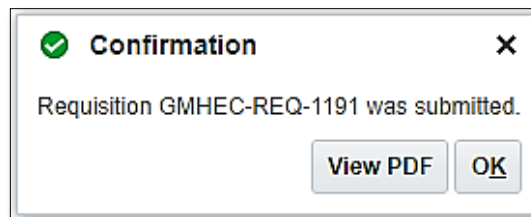
- 000000 Default CC
- 999999 Testing CC
- 000000 None

After reviewing your cart, click “Submit” in the upper right-hand corner:



Shop | Check Funds | Manage Approvals | View PDF | Save | Submit

You will be automatically directed back to the requisitions homepage with the following pop-up:

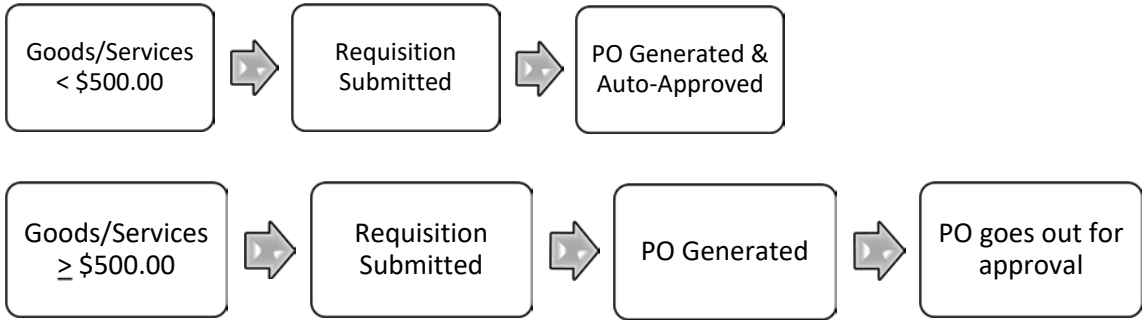
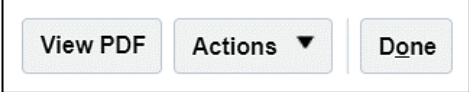


Confirmation X

Requisition GMHEC-REQ-1191 was submitted.

View PDF OK

Your requisition will be electronically processed into a purchase order, so long as you clicked “Negotiated” (see p. 2). If you did not click “Negotiated” please view reference guide [“Purchase Orders – 6.0”](#) for instructions on how to move your requisition to become a PO.

<p>4.5 Approval Flow</p>	<p>Once your PO is created, the following approval flow takes place:</p>  <pre> graph LR subgraph Under500 A[Goods/Services < \$500.00] --> B[Requisition Submitted] B --> C[PO Generated & Auto-Approved] end subgraph Over500 D[Goods/Services ≥ \$500.00] --> E[Requisition Submitted] E --> F[PO Generated] F --> G[PO goes out for approval] end </pre>
<p>4.6 PO Communication</p>	<p>Email through Oracle:</p> <ul style="list-style-type: none"> • If an email for an ordering address in your supplier's file, the PO will be sent to the corresponding email • You will need to follow-up with your supplier to determine if they received your PO <p>Print Email/Fax/Mail PO:</p> <ul style="list-style-type: none"> • To download a PDF copy of your PO, click "View PDF" from the PO page:  <ul style="list-style-type: none"> • Your PDF will download – here you can save and/or print your PDF to email from your own address, fax, or mail • You will need to follow-up with your supplier to determine if they received your PO
<p>4.7 Follow-Up</p>	<p>Approval Status</p> <ul style="list-style-type: none"> • For steps on how to find your PO's approval status, please see reference guide "Purchase Orders - 6.0" for detailed instructions. <p>Purchase Order Modifications</p> <ul style="list-style-type: none"> • 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. <p>Matched Invoices</p> <ul style="list-style-type: none"> • 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.