

Smart Forms – Section 5.0

This process will be used to order catering and transportation services. Due to the nature of these services, there are frequently used specifications which make it a great choice for Smart Form ordering.

Audience: All

Additional Resources:

- <https://www.gmhec.org/procurement-knowledge-base/>
- cheryl.foster@gmhec.org

Process Step & Description	Action
<p>5.1 Complete & Submit a Smart Form</p>	<p>Navigation Path: ➤ Procurement → Purchase Requisition</p> <p>Scroll down to “Request Forms”</p> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;">Request Forms</p> <ul style="list-style-type: none"> • Catering Details • Transportation Details </div> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; background-color: #d9ead3; margin-bottom: 10px; width: fit-content;"> <p>Quick Tip! Enable your pop-ups in Oracle</p> </div> <p>Catering:</p> <ul style="list-style-type: none"> • For external caterers only • Not for use with in-house dining <p>Transportation:</p> <ul style="list-style-type: none"> • For student transportation only • Ex. Athletics bus transport to games/matches • Not for use with expense travel <p>Choose the form you wish to use. For this purpose we will use Catering.</p> <p>Fill-out your request:</p> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: right;">Add to Shopping List Add to Cart Done 0</p> <p>Request Type: Catering Details</p> <p>Catering Information For GM</p> <p>Line Type: Fixed Price Services</p> <p>* Item Description: Alumni event - off campus on April 15th</p> <p>* Category Name: Catering Services</p> <p>* Amount: 1,000.00</p> <p>* Currency: USD</p> <p><input checked="" type="checkbox"/> Negotiated ← Click</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Agreement: </p> <p><input type="checkbox"/> New supplier</p> <p>Supplier: Fire & Ice Restaurant</p> <p>Supplier Site: GM Middleb-1</p> <p>Supplier Contact: </p> <p>Phone: </p> <p>Fax: </p> <p>Email: </p> <p>Supplier Item: </p> </div> </div> </div> <p>Always click “Negotiated” on your Smart Form. This will insure that your PO is auto-created for approval and fulfillment.</p>

Add attachments if applicable:

1. Click the "+" icon
2. Add your document
3. Save

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display						

Add additional information:

Additional Information

Catering Details

Number of Guests:

Delivery Time:

Pickup Time:

Food Menu
 Assorted Appetizers
 Chicken entree w/ sides - 60
 Vegetable entree w/ sides - 5
 Fruit and Cheese Tray
 Chocolate torte

Drinks Menu
 Water, Lemonade, Coffee & Tea

Is the Caterer required to pick up after the event?

Restrictions (allergies, sensitivities, etc.)
 2 gluten free guests
 1 vegan guest

Silverware/Cutlery Needed

Linen Needed

Napkin Needed

Additional Information
 Linen tablecloths and napkins - colors white

Add contact information:

Contact Details


Contact name:

Contact Phone Number:

Contact Email:

Scroll back up and Add to Cart:

Review your cart:


 Alumni event - off campus on April 15th
 \$1,000.00

Total \$1,000.00

Scroll down and complete/review/confirm fields.

- Confirm your Delivery Location. Change if needed.

Edit Requisition: GM-REQ-1017 Shop Check Funds Manage Approvals View PDF Save Submit

Requisitioning BU: GMHEC BU Justification: Requisition Amount: 1,000.00 USD

* Description: Alumni event - off campus on April 15th Emergency purchase order number required Approval Amount: 1,000.00 USD

Funds Status: Not reserved Attachments: None +

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Description	Additional Information Required	Category Name	* Quantity	UOM Name	Price	* Amount	Amount (USD)	Funds Status	Delete
1	Alumni event - off ca		Catering Services				1,000.00	US 1,000.00	Not reserved	
Total								1,000.00		

Rows Selected 1 Columns Hidden 7

Line 1: Details

Delivery

* Requester: Foster, Cheryl * Deliver-to Location: Kennedy Brothers

Urgent: No Deliver-to Address: 11 Main Street, Kennedy Brothers Co-Working Space, VERGENNES VT 05491, UNITED STATES

Requested Delivery Date: 07-Mar-2019

Billing

View Format Freeze Detach Wrap

Charge Account	* Budget Date	* Percentage	Amount (USD)	Funds Status	Distribution Flexfields	Delete
100-1001-50100-10-000000-00000-001	28-Feb-2019	100	1,000.00	Not reserved	Designation	
Total			100	1,000.00		

Notes and Attachments

Note to Supplier: Attachments: None +

Source

Agreement Type: Agreement Supplier: Fire & Ice Restaurant

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.

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

Charge Account Nickname	Charge Account
Supplies	101-1100-46011-10-000000-00000-000

Charge Account X

Hide Segments

Entity: 101 Green Mountain Higher Education Consortium, Inc.

Department: 1100 Shared Services

Object: 46011 Supplies

Restriction: 10 Unrestricted

Designation: 000000 Default

Activity: 00000 Default

Intercompany: 000 Default

Future1: 0 Default

- Split Billing – To split charges between multiple Cost Centers:
 - Click the button indicating split (looks like a wishbone!)
 - 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.
 - You can split by Percentage or Amount.
 - Save Changes.

Budget Date	Percentage	Amount (USD)	Charge Account	Funds Status	Distribution Flexfields Designation
22-Jan-2019	50	250.00	100-1100-10000-10-000000-00000-000-0	Not reserved	000000
22-Jan-2019	25	125.00	100-1100-10000-10-000000-00000-000-0	Not reserved	000000
22-Jan-2019	25	125.00	100-1100-10000-10-000000-00000-000-0100-1100-10000-10-000000-00000-000-0	Not reserved	000000
Total					

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

CF

Confirmation X

Requisition GM-REQ-1251 was submitted.

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