

**Step 1:
Log in to Oracle.**

This takes you to a new navigation screen.



**Step 2:
Click on the plus sign next to the responsibility you want to access.**

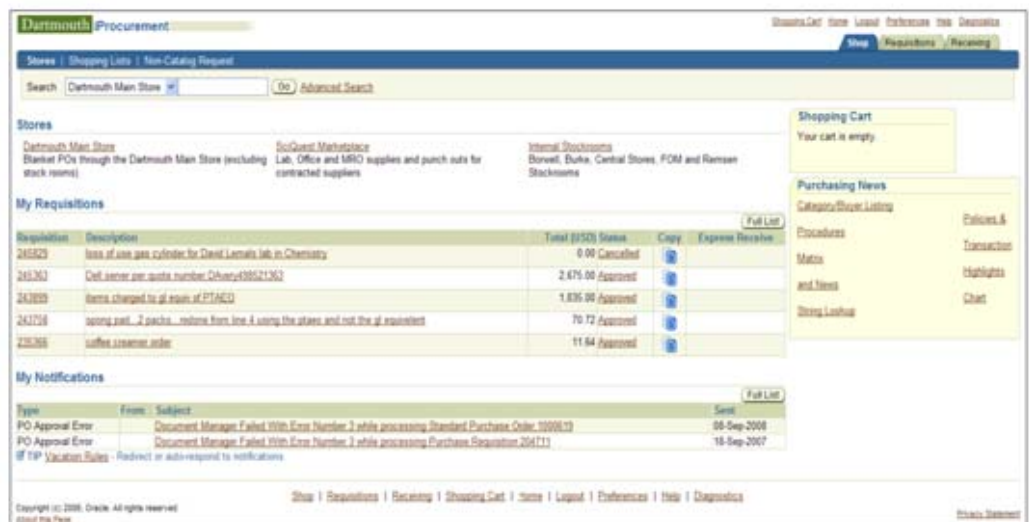
The folder opens and a list of functions appears.



**Step 3:
Click on the name of the function you want to open.**



The function opens (in this example, the iProcurement Home Page) and you operate as you normally do.



Search [Advanced Search](#)

Stores

[Dartmouth Main Store](#)
Blanket POs through the Dartmouth Main Store (excluding stock rooms)

[SciQuest Marketplace](#)
Lab, Office and MRO supplies and punch outs for contracted suppliers

[Internal Stockrooms](#)
Borwell, Burke, Central Stores, FOM and Remsen Stockrooms

My Requisitions

Requisition	Description	Total (USD)	Status	Copy	Express Receive
245829	loss of use gas cylinder for David Lemals lab in Chemistry	0.00	Cancelled		
245363	Dell server per quote number DAvery498521363	2,675.00	Approved		
243899	items charged to gl equiv of PTAFO	1,035.00	Approved		
243758	spong pad...2 packs...redone from line 4 using the ptaeo and not the gl equivalent	70.72	Approved		
235366	coffee creamer order	11.64	Approved		

My Notifications

Type	From	Subject	Sent
PO Approval Error		Document Manager Failed With Error Number 3 while processing Standard Purchase Order 1000619	08-Sep-2008
PO Approval Error		Document Manager Failed With Error Number 3 while processing Purchase Requisition 204711	18-Sep-2007

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

Shopping Cart

Your cart is empty.

Purchasing News

[Category/Buyer Listing](#)

[Procedures](#)

[Matrix and News](#)

[String Lookup](#)

[Policies & Transaction](#)

[Highlights](#)

[Chart](#)

Make sure your Shopping Cart is empty. Then click on Non-Catalog Request.

Non-Catalog Request

* Indicates required field

[Clear All](#) [Add to Cart](#) [Add to Favorites](#)

Shopping Cart

Your cart is empty.

Item Type	Goods or services billed by amount
* Item Description	<input type="text"/>
* Category	<input type="text"/>
* Amount	<input type="text"/>
* Currency	USD

<input type="checkbox"/> New Supplier	
Supplier Name	<input type="text"/>
Site	<input type="text"/>
Contact Name	<input type="text"/>
Phone	<input type="text"/>
Supplier Item	<input type="text"/>

[Clear All](#) [Add to Cart](#) [Add to Favorites](#)[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Diagnostics](#)

- *Choose the appropriate Item Type. Use the arrow at the end of the field to see choices. For this exercise we will choose “Goods or services billed by amount”.
- *Enter Item Description.
- *Select the Category. If needed, click on the flashlight search.
- *Enter the Amount. Since this is an amount based line you will want to enter the exact amount for the goods/services if known. If you don't know the exact amount you will want to enter you best guess since these funds will be encumbered.
- *Enter the Supplier Name. If you know the name of the supplier type in part of the name, for example “Fisher Sci” and hit tab. If you don't know how the supplier is listed in the system, click on the flashlight and search using the % as a wild card. For example, %George%Johns% this will return The George T. Johnson Co. as a result.
- *Select the site. If the supplier has more than one site pick the one you know is correct. If you don't know the correct site choose one and A/P can pay a different site if needed.
- *Now click on Add to Cart.

Non-Catalog Request

* Indicates required field

Item Type	Goods or services billed by amount
* Item Description	Web page design for Procurement Services. Not to exceed \$4500. Services to be performed by 07/10.
* Category	Services.Web Design
* Amount	4,500.00
* Currency	USD

[Clear All](#) | [Add to Cart](#) | [Add to Favorites](#)

<input type="checkbox"/> New Supplier	
Supplier Name	Svend Design
Site	SUNAPEENH
Contact Name	
Phone	
Supplier Item	

Shopping Cart

Your cart contains 1 line.

Recently Added Lines

Web page des...	4,500.00	USD
-----------------	----------	-----

[View Cart and Checkout](#)

[Clear All](#) | [Add to Cart](#) | [Add to Favorites](#)

This is what the screen will look like after following the previous steps.

*Click on View Cart and Checkout

Shopping Cart

[Save](#) [Checkout](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	Web page design for Procurement Services. Not to exceed \$4500. Services to be performed by 07/10.		EACH	<input type="text" value="4500"/>	1 USD	4,500.00	
						Total	4,500.00

[Return to Shopping](#)

[Save](#) [Checkout](#)

Copyright (c) 2006, Oracle. All rights reserved.
[About this Page](#)

[Privacy Statement](#)



*Verify that the information is correct and click on Checkout. If the information is not correct you can change the Quantity or Delete a line item.



Checkout: Requisition Information

* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

* Requisition Description		Web page design for Procurement Services. Not to exce	
* Confirming Order		<input type="text"/>	
* Capital Expense		<input type="text"/>	

Delivery	* Need-By Date	03-Sep-2009 17:00:00	
		(example: 17-Aug-2009 19:45:00)	
	* Requester	Moffatt, Tammy L	
	* Deliver-To Location	HILLCT	
	* Suggested Buyer	<input type="text"/>	

Billing	Project	<input type="text"/>	
	Task	<input type="text"/>	
	Award	<input type="text"/>	
	Expenditure Type	<input type="text"/>	
	Expenditure Organization	<input type="text"/>	
	Expenditure Item Date	<input type="text"/>	
		(example: 17-Aug-2009)	
	Taxable	No	
	GL Date	01-Sep-2009	

Cancel Save Submit Edit Lines Step 1 of 3 Next

By clicking on Checkout, you will get this screen

***Confirming Order Box** – This is a mandatory field. If you enter “No” in this field that lets the Buyer in Procurement Services know that they need to send the order to the supplier for you to receive the goods or services. If you enter “Yes” in this field that lets the Buyer, in Procurement Services, know that you have already placed the order with the supplier. You would also enter “Yes” in this field if you have already received the goods or services, if you already have the invoice, if you have already arranged for the goods to be delivered or the services to be rendered.

***Capital Expense Box** – This is a mandatory field. If you enter “No” in this field then the goods are not considered capital equipment or fabricated equipment. The definition of capital equipment is tangible personal property having a useful life of one year or more and an acquisition cost of \$5,000 or more per unit. The definition of fabricated equipment is equipment that is assembled or manufactured by the College using purchased materials, in-house machinery or tools and College labor. Fabricated equipment valued at \$5,000 or more and having a useful life of one year or more shall be capitalized and recorded on the College's equipment inventory. If the goods you are procuring fit either of the definitions above, you need to enter “Yes” in the Capital Expense field.

*Enter the Requesters name. Only do this if the correct name does not appear in that field. Enter last name and hit tab.

*Make sure the Deliver-To Location is correct for the Requester you entered. Do not leave Dartmouth College in this field. You must pick a building and room. If you don't know how it is in the system, use the flashlight to search.

*Make sure you enter Suggested Buyer. This is the individual in Procurement Services who will be handling the order with the supplier. Enter last name and hit tab.

*If you are charging a PTAE0 then enter it on this screen. If you are charging a chart string click on Edit Lines. You only need to go to edit lines if you are not charging the chart string that you have set as your primary in your iProcurement Preferences.



Requisition Information: Edit Lines

* Indicates required field

[Return](#)

[Delivery](#) | [Billing](#) | [Accounts](#) | [Attachments](#)

Select Lines: [Update](#) [Copy](#) [Delete](#)

[Select All](#) | [Select None](#)

Select Line	Description	Need-By Date	Requester	Deliver-To Location	Suggested Buyer
<input type="checkbox"/> 1	Web page design for Procurement Services. Not to exceed \$4500. Services to be performed by 07/10.	06-Sep-2009 17:00:00	Moffatt, Tammy L	HILLCT	Sanborn, Corrine P

[Delivery](#) | [Billing](#) | [Accounts](#) | [Attachments](#)

[Return](#)

*To change the chart string click on Accounts.



Requisition Information: Edit Lines

* Indicates required field

[Return](#)

[Delivery](#) | [Billing](#) | [Accounts](#) | [Attachments](#)

Select Lines: [Update](#) | [Copy](#) | [Delete](#)

[Select All](#) | [Select None](#)

Select Line	Description	Charge Account	GL Date	Split
<input type="checkbox"/> 1	Web page design for Procurement Services. Not to exceed \$4500. Services to be performed by 07/10.	<u>20.558.368000.346251.0000.7511</u>	20-Aug-2009	

TIP Click on a Split icon to allocate costs to multiple accounts.

[Delivery](#) | [Billing](#) | [Accounts](#) | [Attachments](#)

[Return](#)

*To change the chart string click on the underlined Charge Account.



Requisition Information: Split Cost Allocation

* Indicates required field

[Return](#)

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 Web page design for Procurement Services. Not to exceed \$4500. Services to be performed by 07/10.	EACH	4500	1 USD	4,500.00

[Projects](#) [Charge Accounts](#)

Line	Nickname	DC Account String	GL Date	Percent	Quantity	Amount (USD)	Delete
1	Procurement Svcs	20.558.368000.346251.0000.7511 <small>ENTITY.ORG.FUNDING.ACTIVITY.SUBACTIVITY.NATURAL_CLASS</small>	20-Aug-2009	100	4500	4,500.00	
Add Another Row				Total	100	4500	4,500.00

[Projects](#) [Charge Accounts](#)

TIP Total allocation must equal 100% of the selected line values.

Apply this Cost Allocation information to all applicable requisition lines

[Return](#)

- *Now you can click on the arrow in the Nickname field to bring up the correct chart string if you have it saved in your iProcurement Preferences. If it is not in you preferences, click on the symbol at the end of the DC Account String and enter each segment there. Or you can highlight the DC Account String field and type your chart string in that field.
- *When done click Return.
- *Now do the same steps to make sure the correct chart string is on line #2, #3, #4, etc (if you have more than one line).
- *When done click Return twice. This will bring you back to the Checkout:Requisition Information page.



Checkout: Requisition Information

* Indicates required field

[Cancel](#) [Save](#) [Submit](#) [Edit Lines](#) Step 1 of 3 [Next](#)

* Requisition Description
* Confirming Order
* Capital Expense

Delivery

* Need-By Date
(example: 20-Aug-2009 19:45:00)
* Requester
* Deliver-To Location
* Suggested Buyer

Billing

Project
Task
Award
Expenditure Type
Expenditure Organization
Expenditure Item Date
(example: 20-Aug-2009)
Taxable
GL Date

[Cancel](#) [Save](#) [Submit](#) [Edit Lines](#) Step 1 of 3 [Next](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Diagnostics](#)

Copyright (c) 2006, Oracle. All rights reserved.
[About this Page](#)

[Privacy Statement](#)



*If you do not have a Note to Buyer, or Attachments such as quotes, a Sole Source form, an Independent Contractor form, etc then you can hit the Submit button.

*If you have further information then you will want to hit Next.

Checkout: Review Approver List

Based on your approval authority, this requisition does not require approval by others.

Approver Name	Delete
No results found.	

Justification

Note To Buyer

Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

*You should not have to change or add an approver since an approver was setup for you when your systems access was granted.

*Type in the justification field if necessary.

*Type in the Note to Buyer field if necessary. You don't need to type "confirming" or "non-confirming" in this field. The information you enter in this field could contain new supplier information, a name of an individual at the supplier's site that the order needs to be faxed to, prepayment information, or any other information that the Buyer will need to know to process the order.

*If you need to Add Attachments click on the button and proceed to the next screen.

Add Attachment

[Cancel](#) [Add Another](#) [Apply](#)

Add

Attachment Summary Information

* Indicates required field

* Description

Category

Define Attachment

Type File URL Text

[Browse...](#)

Name

(Optional: provide a name to Text attachment)

[Cancel](#) [Add Another](#) [Apply](#)

- *Type in the Description field the name of the form you are attaching.
- *In the Category field click on the arrow to pick To Buyer.
- *In the Define Attachment section click Browse. This will open up your documents and you can find the one that needs to be attached to this order. (You will want to scan in your Bids, Sole Source form, Independent Contractor form, etc to your desktop prior to browsing.)
- *When you have attached all appropriate documents, hit Apply.



Confirmation

Attachment "britishairwaysletter.docx" has been added successfully but not saved. Complete your work to save your attachment.

Checkout: Review Approver List

Based on your approval authority, this requisition does not require approval by others.

[Save](#) [Submit](#) [Back](#) [Step 2 of 3](#) [Next](#)

[Change First Approver](#)

Approver Name	Delete
No results found.	

[Add Approver](#)

Justification

Note To Buyer

Attachments

Add Attachments									
File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
britishairwaysletter.docx	File	Sole source form	To Buyer	PUR_ROGERS	04-Sep-2009	One-Time			

[Save](#) [Submit](#) [Back](#) [Step 2 of 3](#) [Next](#)



*This completes the requisition. You can now hit Submit.

*If you wish to take a copy of the requisition you will want to hit Next and continue from there with Submit. We recommend that you do not print the requisitions since you can view the information in the system at any time.

Confirmation

Requisition 344628 has been submitted.

To check on this requisition's status, click on the **Requisitions** tab or look in **My Requisitions** on the Shop page.

[Continue Shopping](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Diagnostics](#)

Copyright (c) 2006, Oracle. All rights reserved.
[About this Page](#)

[Privacy Statement](#)

*This screen lets you know that the requisition has been submitted. It may have gone to your approver or it may have gone directly to Procurement Services for a Buyer to act upon. This depends on the approval level you have in the system.