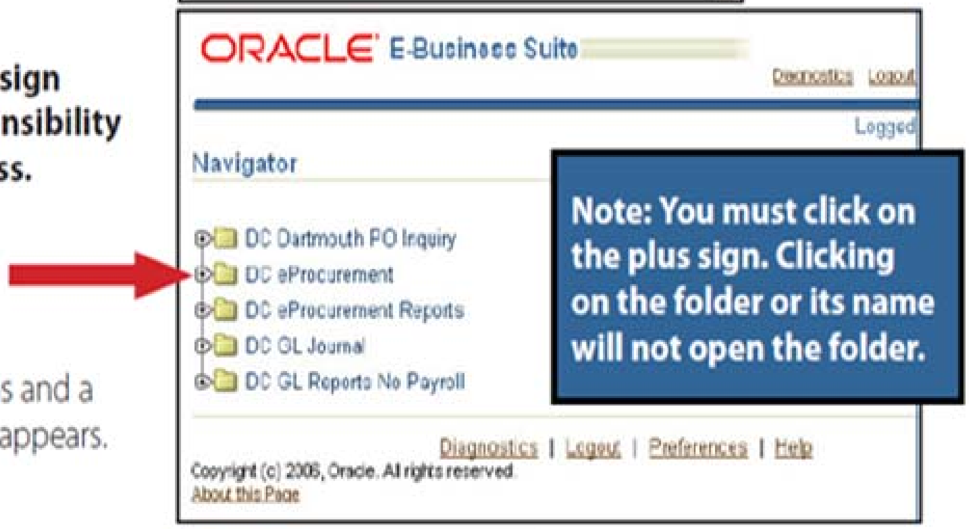
Step 1:
Log in to Oracle.

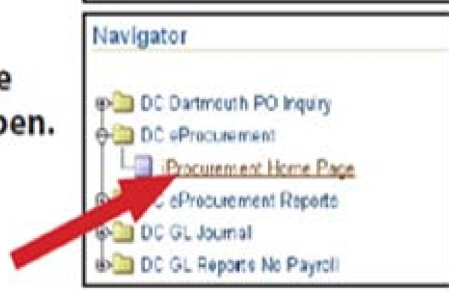
This takes you to a new navigation screen.

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

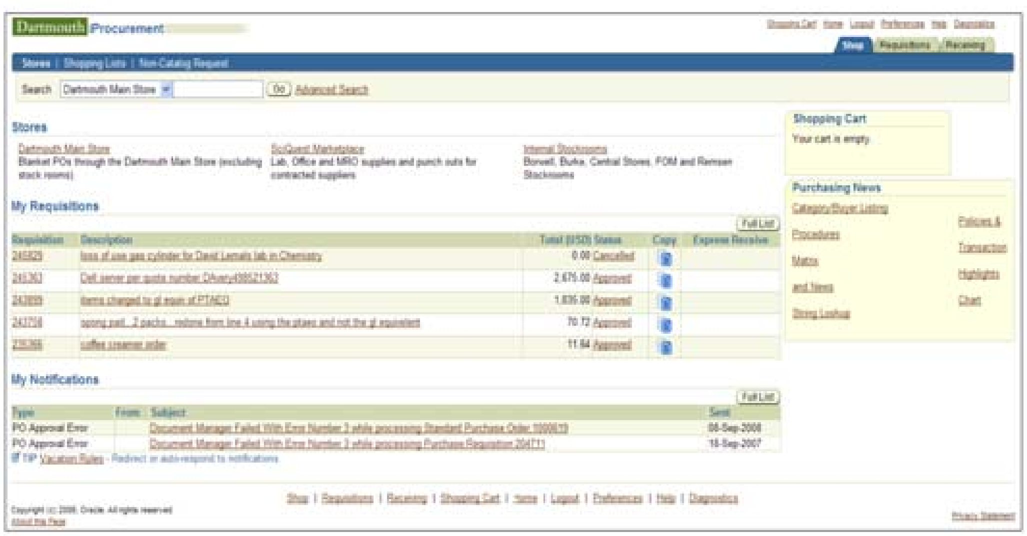
The folder opens and a list of functions appears.



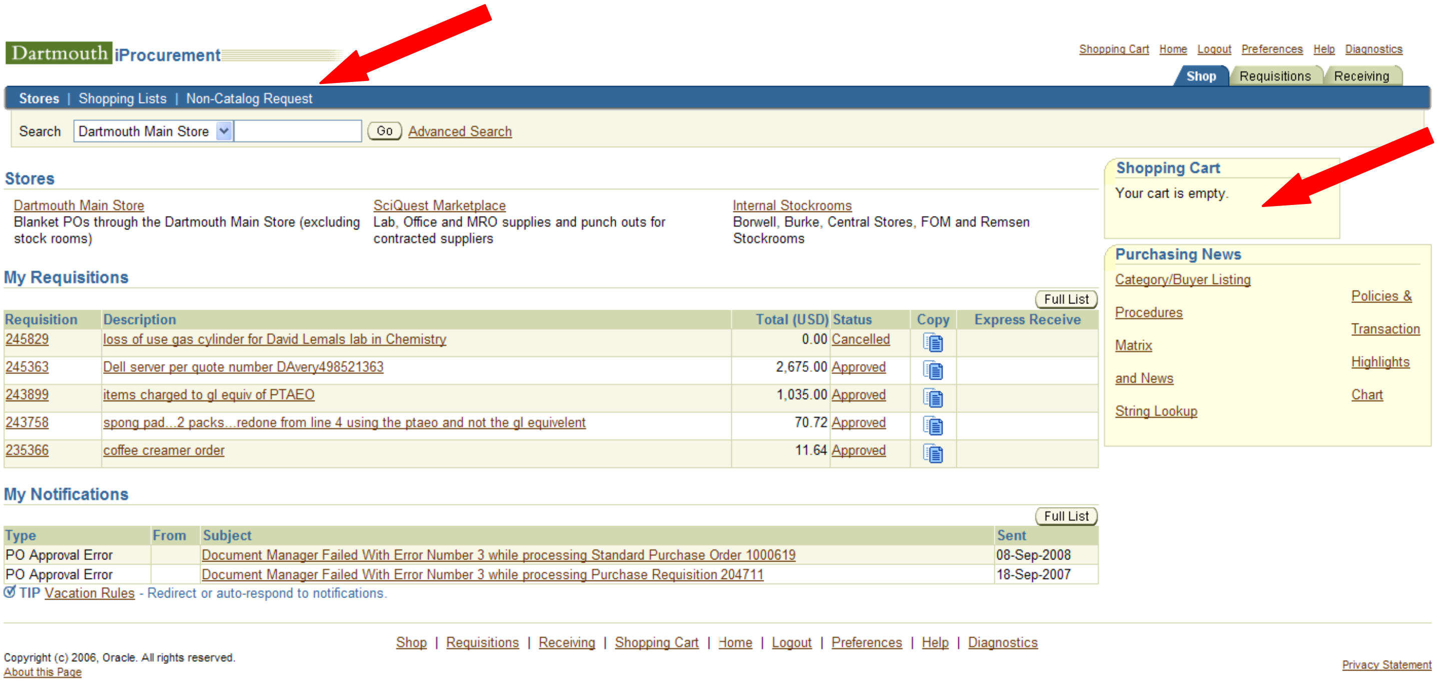
Step 3:
Click on the name of the function you want to open.



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

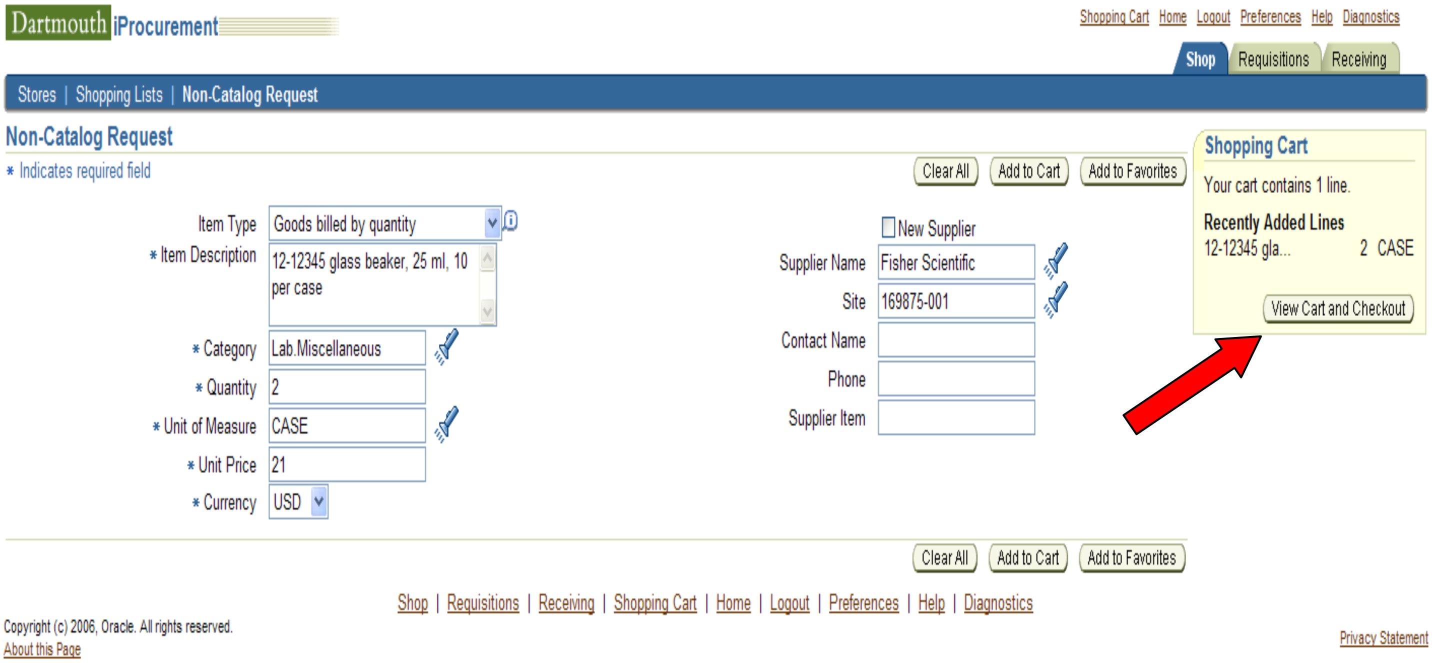


eProcurement Entering a
non-catalog, quantity based requisition



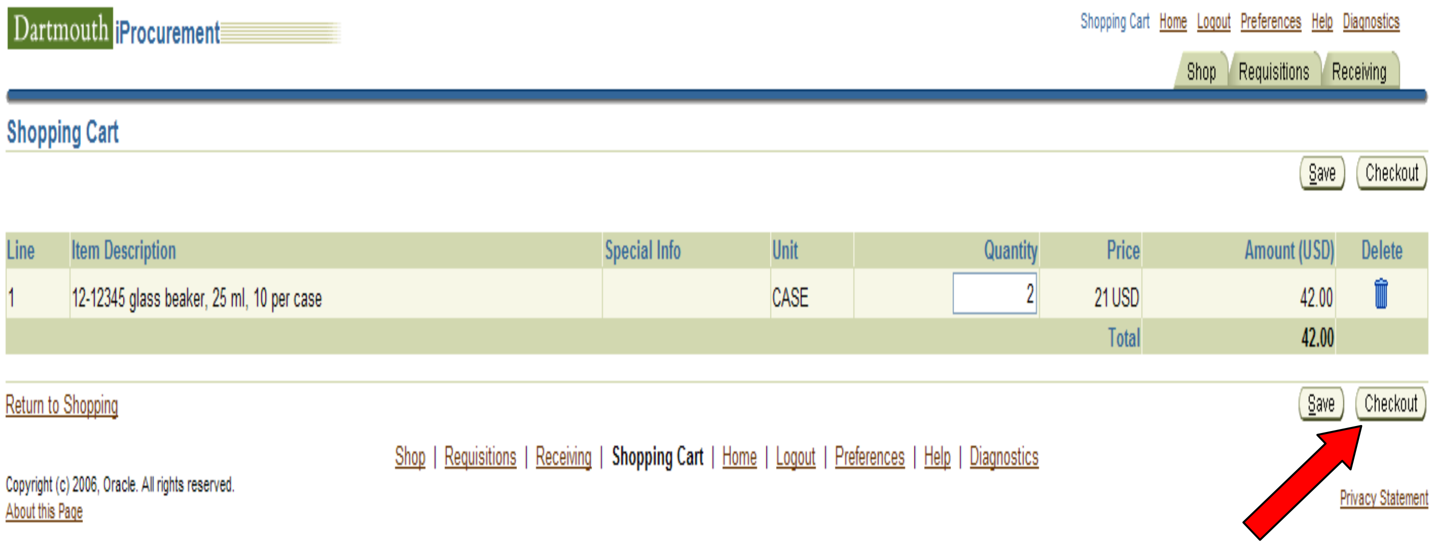
Make sure your Shopping Cart is empty. Then click on Non-Catalog Request.

*Choose the appropriate Item Type. Use the arrow at the end of the field to see choices. For this exercise we will choose "Goods billed by quantity".
*Enter Item Description.
*Select the Category. If needed, click on the flashlight and search.
*Enter the Quantity being ordered.
*Enter the Unit of Measure. If needed, click on the flashlight and search.
*Enter the Unit Price.
*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.

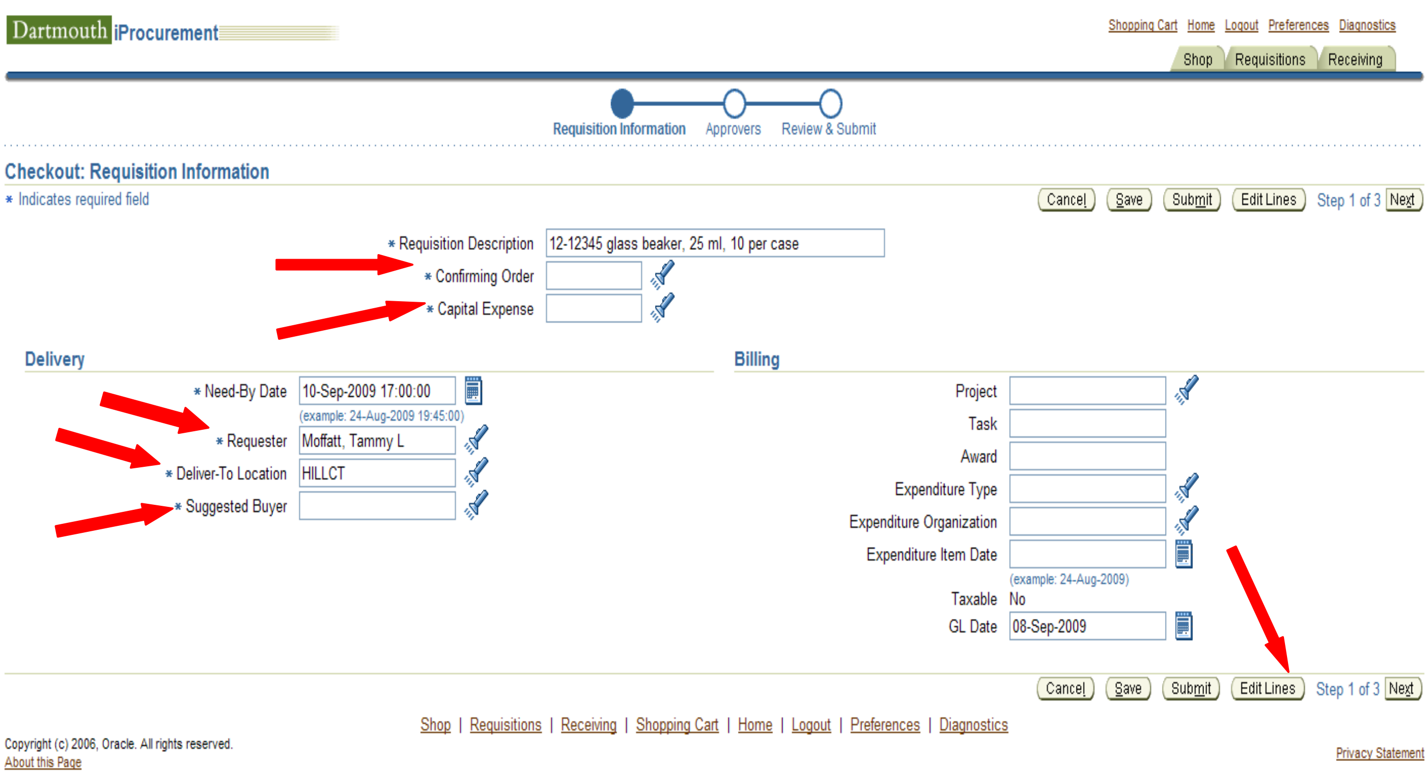


This is what the screen will look like after following the previous steps.

*Click on View Cart and Checkout



*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.



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.

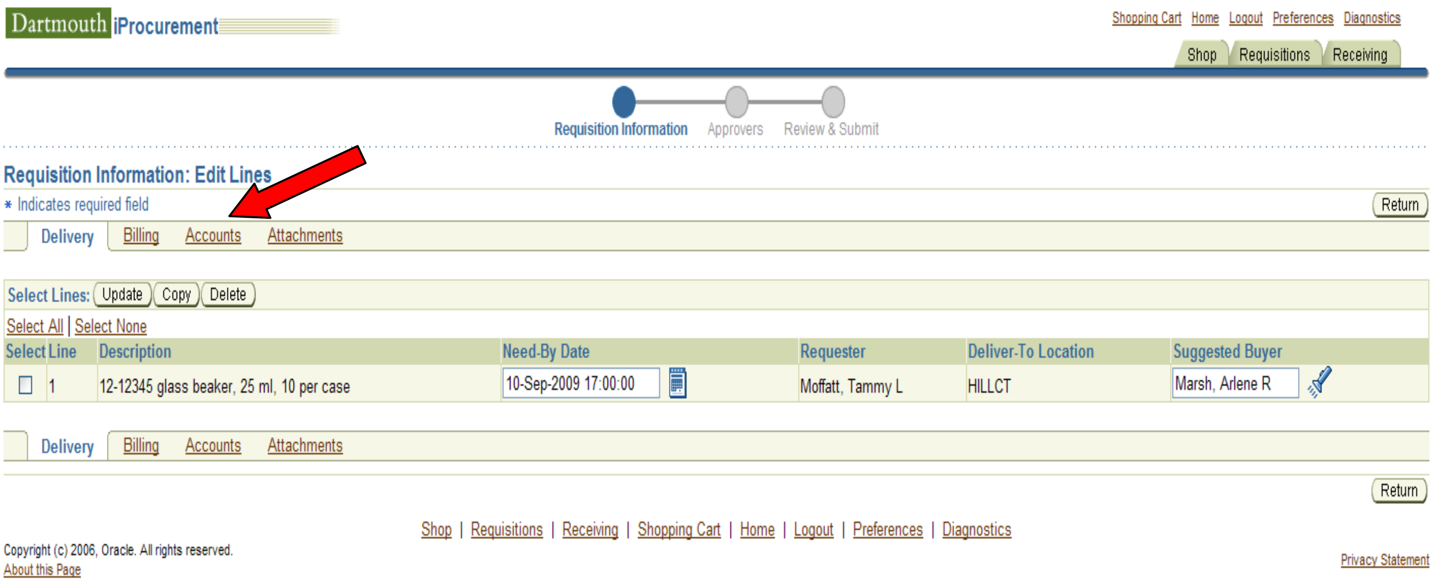
***Capital Expense Box** – This is a mandatory field. If you enter "No" in this field then the goods are not considered capital equipment or fabricated equipment. The definition of capital equipment is tangible personal property having a useful life of one year or more and an acquisition cost of $5,000 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.

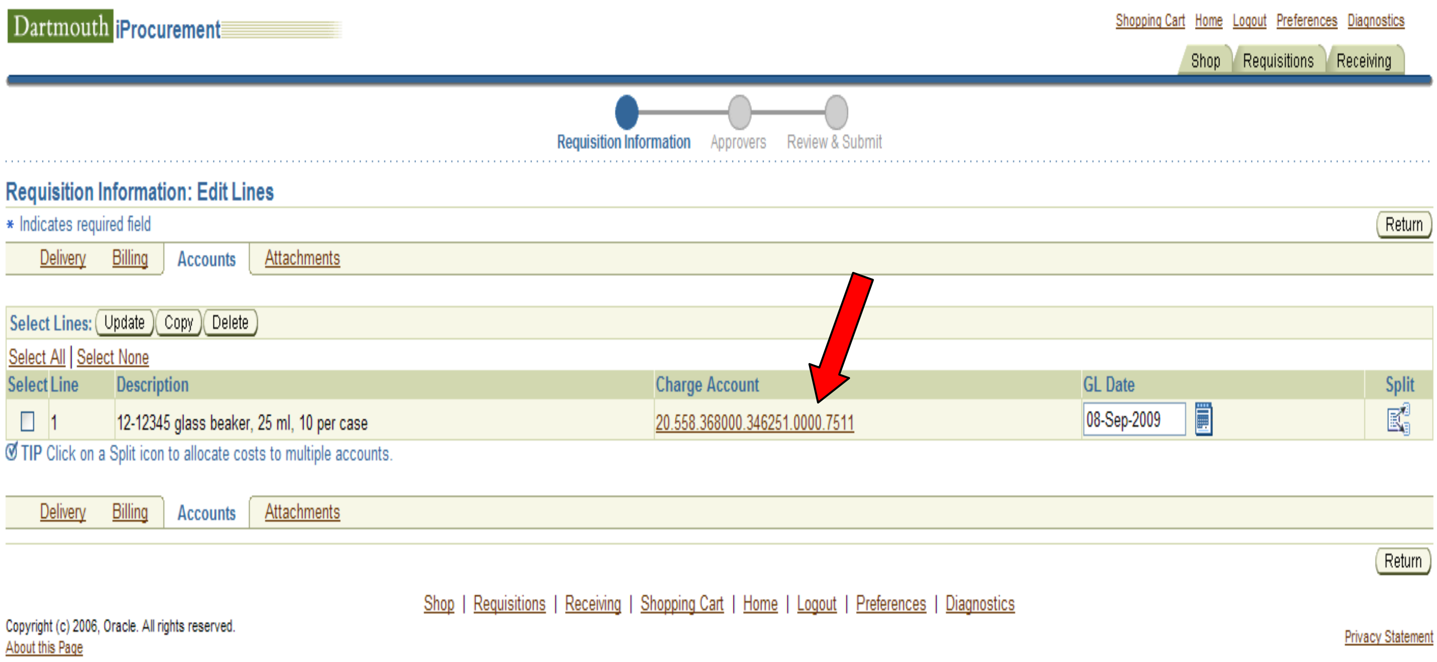
*Make sure the Deliver-To Location is correct for the Requester you entered. Do not leave Dartmouth College in this field. You must pick a building and room. If you don't know how it is in the system, use the flashlight to search.

*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.

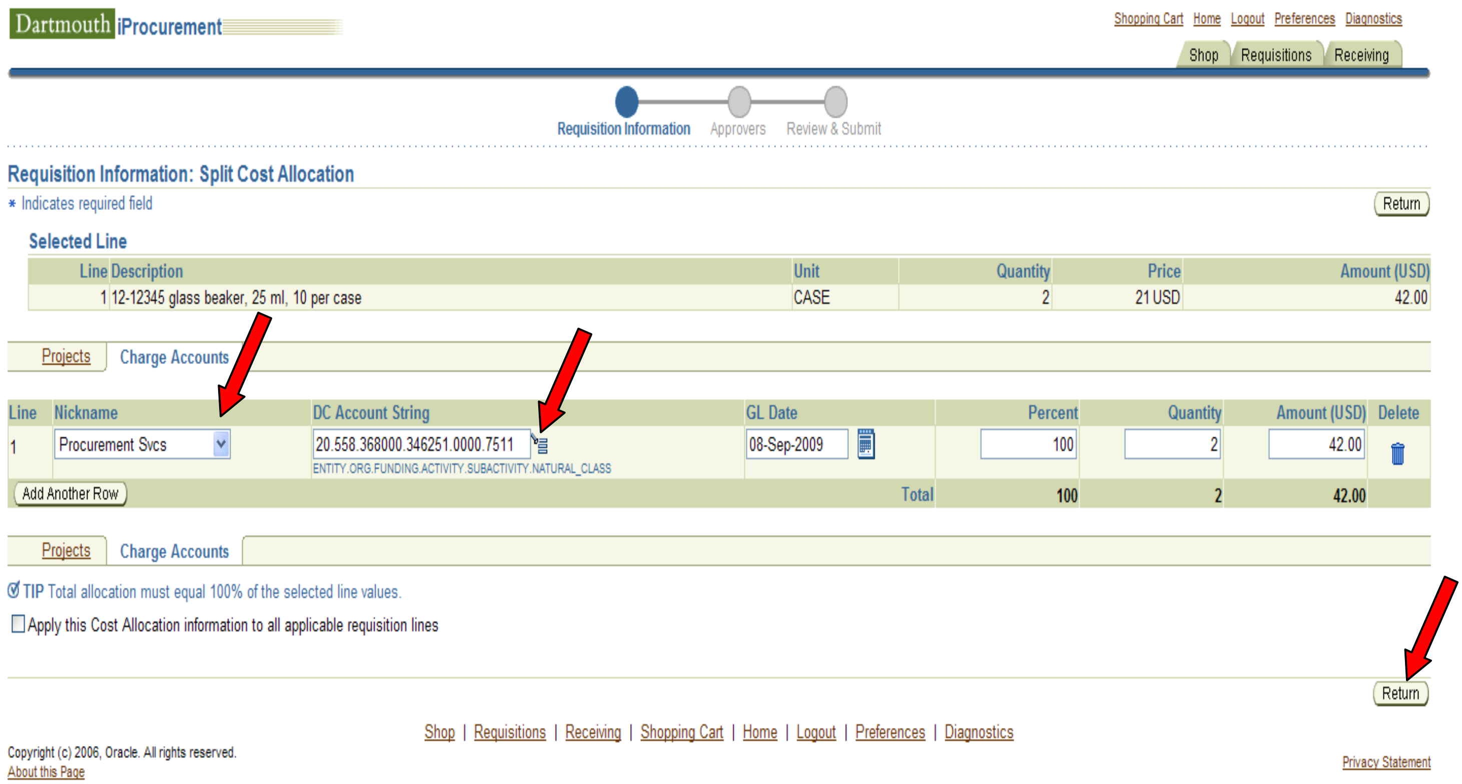
*If you are charging a PTAEO then enter it on this screen. If you are charging a chart string click on Edit Lines. You only need to go to edit lines if you are not charging the chart string that you have set as your primary in your iProcurement Preferences.



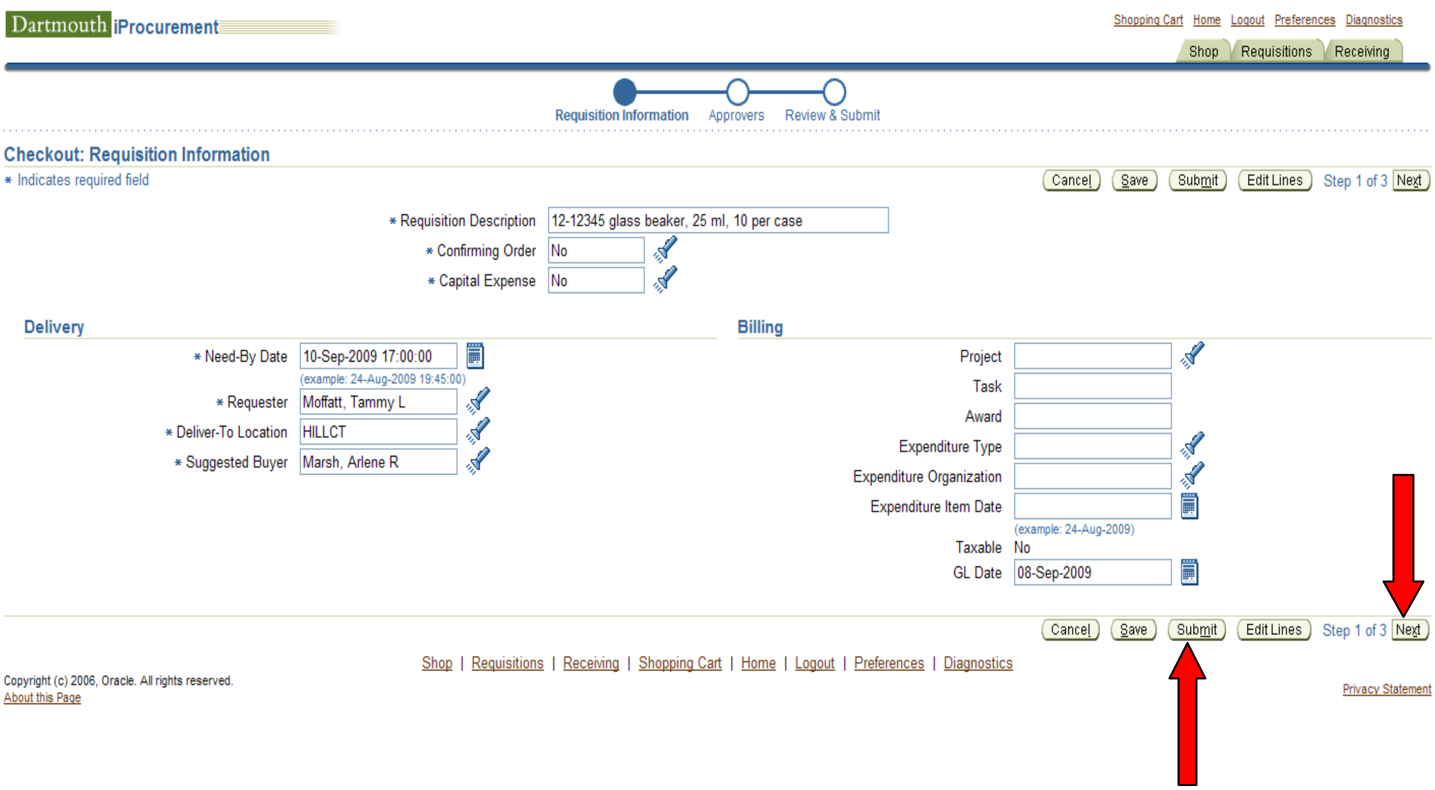
*To change the chart string click on Accounts.



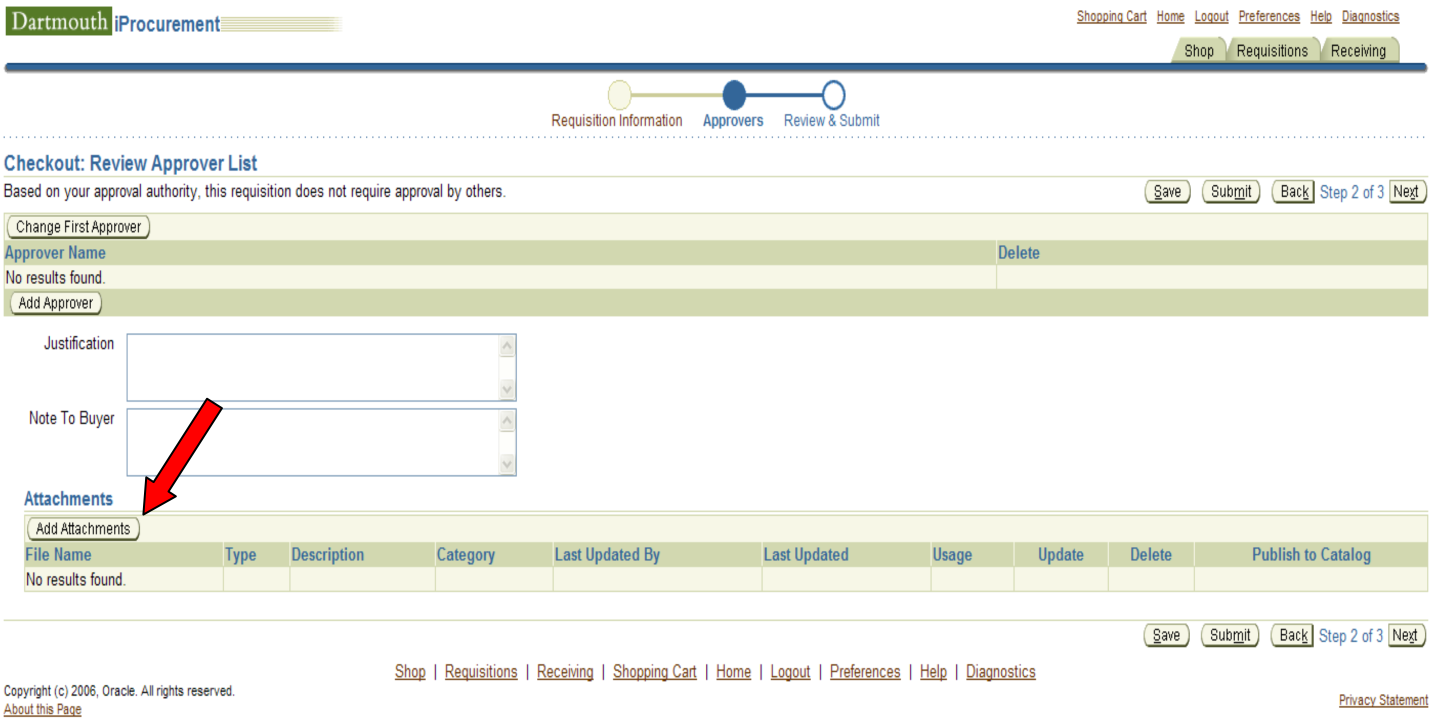
*To change the chart string click on the underlined Charge Account.



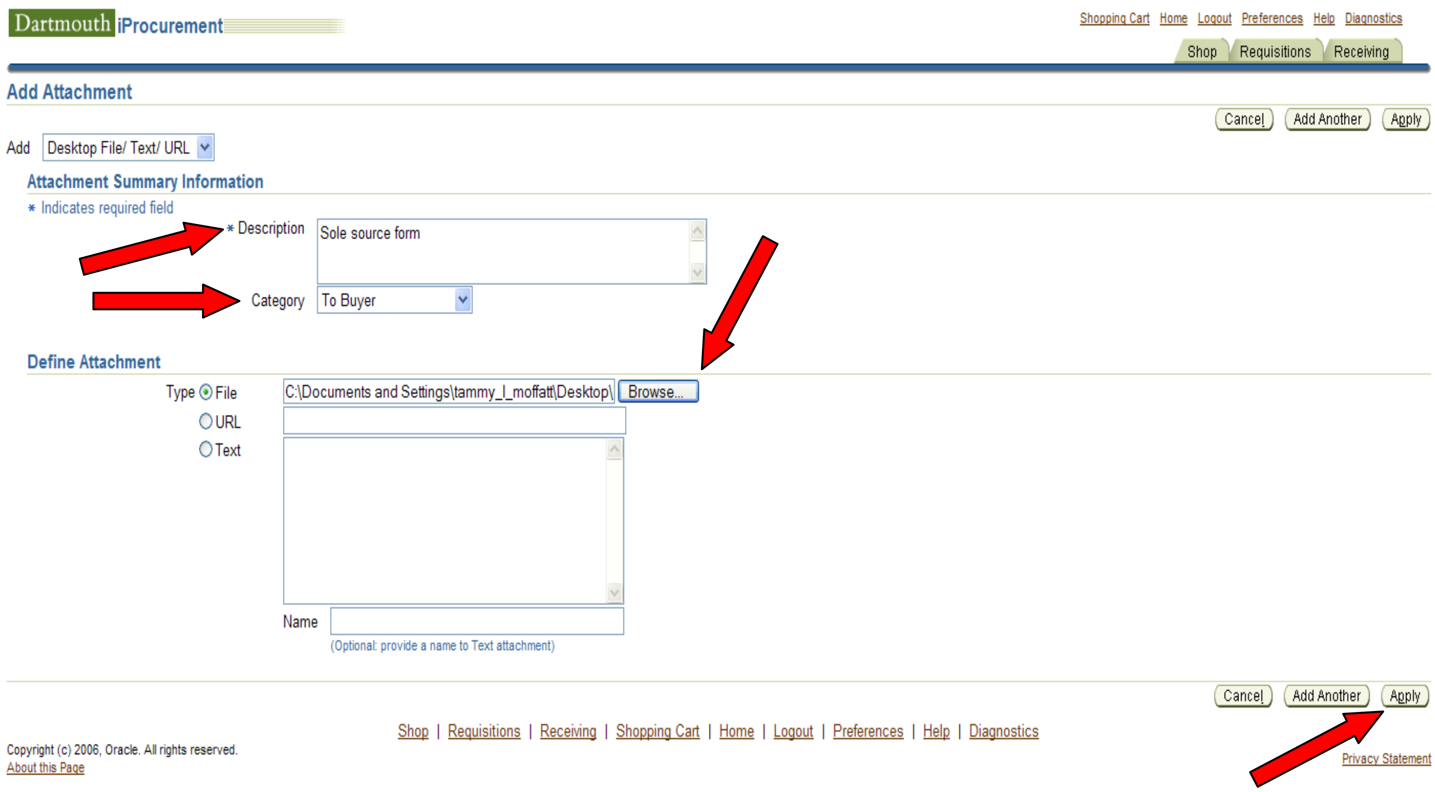
*Now you can click on the arrow in the Nickname field to bring up the correct chart string if you have it saved in your iProcurement Preferences. If it is not in you preferences, click on the symbol at the end of the DC Account String and enter each segment there. Or you can highlight the DC Account 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.



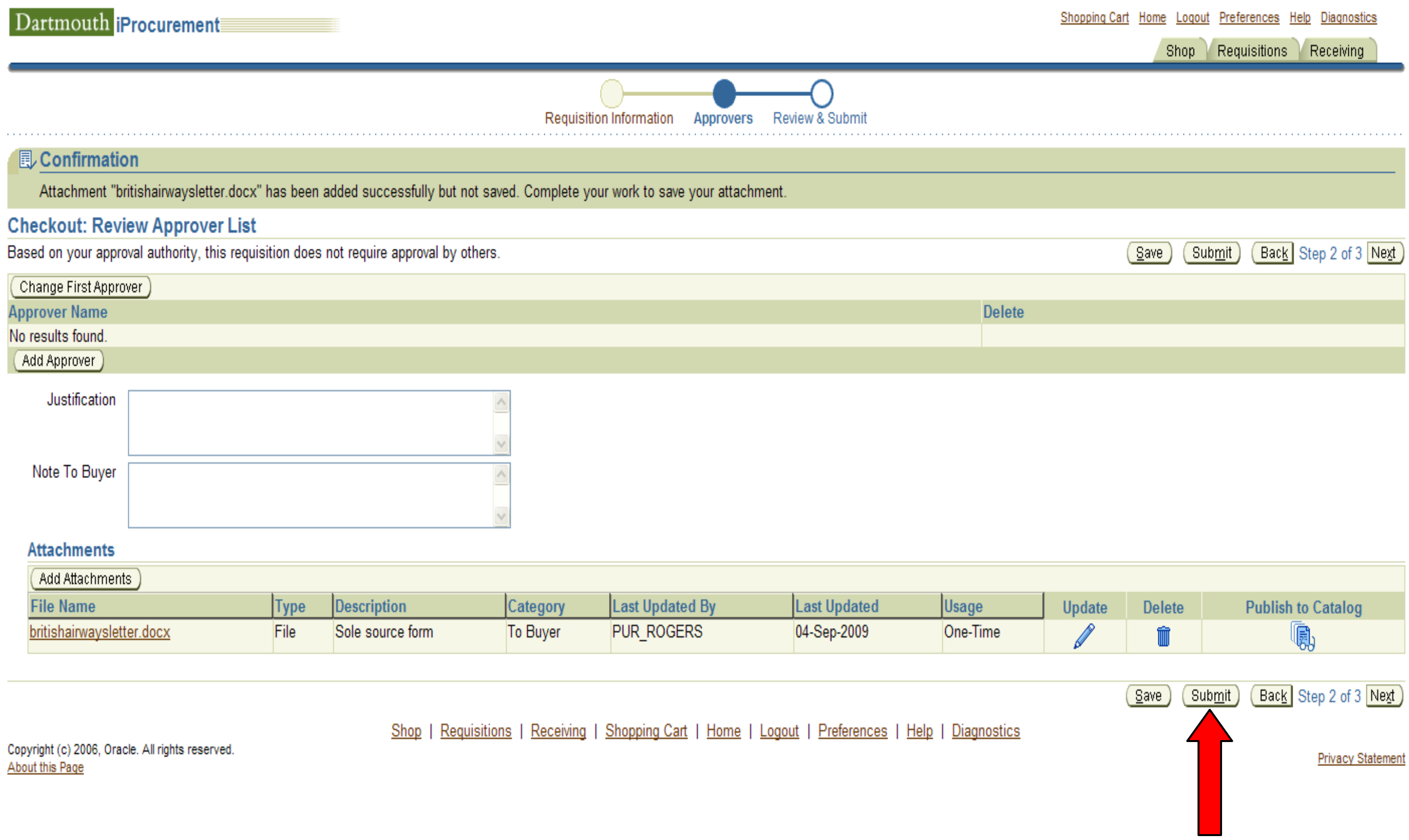
*If you do not have a Note to Buyer, or Attachments such as quotes, a Sole Source form, an Independent Contractor form, etc then you can hit the Submit button.
*If you have further information then you will want to hit Next.



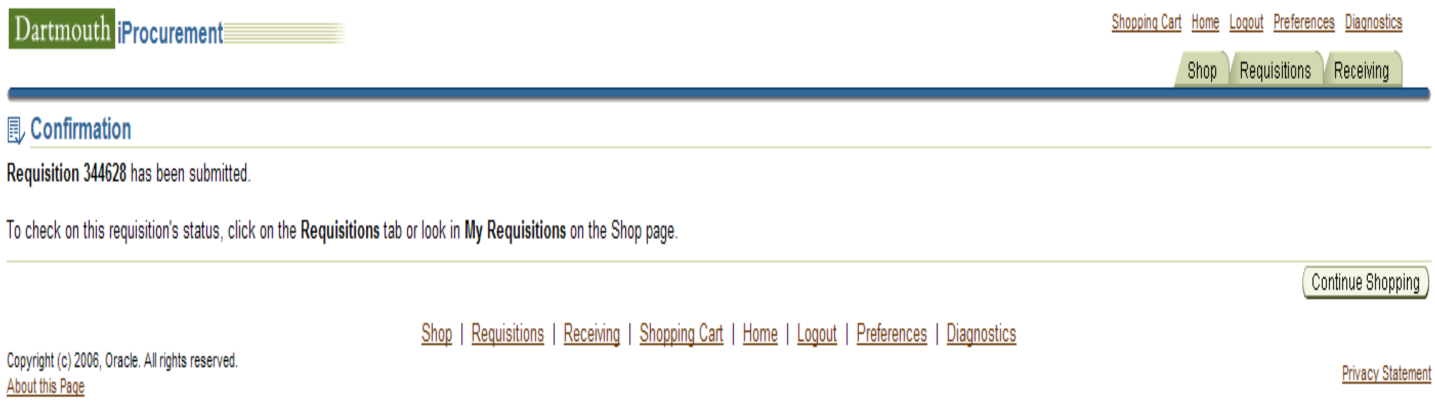
*You should not have to change or add an approver since an approver was setup for you when your systems access was granted.
*Type in the justification field if necessary.
*Type in the Note to Buyer field if necessary. You don't need to type "confirming" or "non-confirming" in this field. The information 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.



*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.



*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.



*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.