

Logging into Oracle

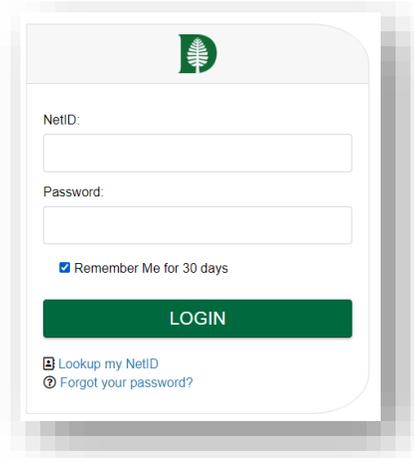
Step 1:

Go to [Oracle](https://oa.dartmouth.edu:8007/OA_HTML/AppsLogin):

https://oa.dartmouth.edu:8007/OA_HTML/AppsLogin

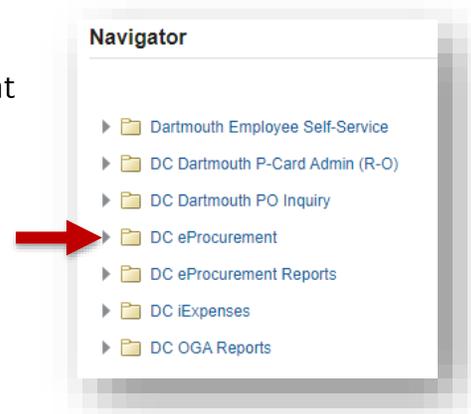
Step 2:

Log in to Single Sign-On (SSO) Web Authentication



Step 3:

Click on the arrow next to the responsibility you want to access in the Navigator

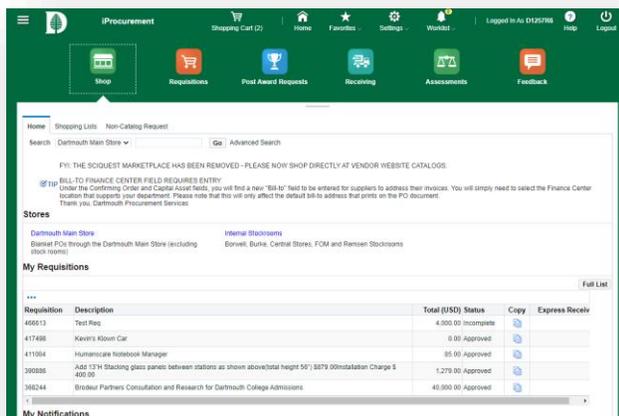
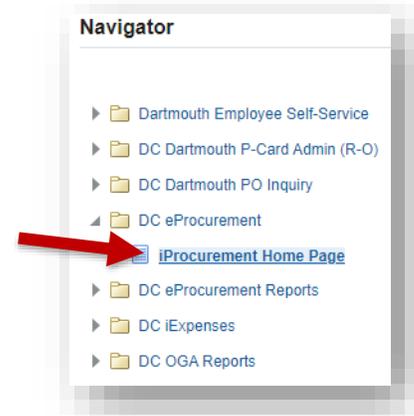


The folder opens and a list of modules appear.

Step 4:

Click on the name of the module you want to open.

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



Creating an Amount-based Purchase Requisition (Non-Catalog Request)

Step 1: Make sure the Shopping Cart is empty. The Shopping Cart is located below the “My Notifications” near the bottom of the page, is empty.

Step 2: Click on Non-Catalog Request

Home Shopping Lists Non-Catalog Request

Non-Catalog Request Clear All Add to Favorites Add to Cart

* Indicates required field

* Item Type Contract Number

* Item Description Supplier Name

* Category Site

* Quantity Contact Name

* Unit of Measure Phone

* Unit Price Supplier Item

* Currency

Shopping Cart
Your cart is empty.

1. 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 I can provide description and Total Amount”.

Home Shopping Lists Non-Catalog Request

Non-Catalog Request Clear All Add to Favorites Add to Cart

* Indicates required field

* Item Type Contract Number

* Item Description Supplier Name

* Category Site

* Amount Contact Name

* Currency

Shopping Cart
Your cart is empty.

2. Enter Item Description.
3. Select the Category. If needed, click on the flashlight search.
4. 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 your best guess since these funds will be encumbered.
5. 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.
6. 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.
7. Now click on Add to Cart.

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

Home Shopping Lists Non-Catalog Request

Non-Catalog Request

* Indicates required field

* Item Type: Goods or Services.I can provide description and Total Amount

* Item Description: Web Design Services

* Category: Services.Web Design

* Amount: 4500

* Currency: USD

Contract Number: []

Supplier Name: Skyline Designs

Site: NewportNH

Contact Name: []

Phone: []

Supplier Item: []

Shopping Cart
Your cart contains 1 line.
Recently Added Lines
Web Design 4,500.00 USD
Serv...
View Cart and Checkout

8. Click on “View Cart and Checkout” and the Shopping Cart will open.

9. Click “Show Delivery and Billing” below the Additional Header Information section. The Delivery and Billing section will open.

Shopping Cart

* Description: Web Design Services

Justification: []

* When do you need these items?: 05-Jun-2021 17:00:00

* Where do they need to be delivered?: LS07 313

Additional Header Information

* Confirming Order: No

* Capital Expense: No

* Bill To: Admin/Prov Fin Ctr

Show Delivery and Billing

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	Web Design Services	EACH	4500	1 USD	4,500.00	[]
Total					4,500.00	

Continue Shopping Edit Save Submit

10. In the Suggested Buyer field enter the Procurement Buyer name (last name first) based on the item being purchased.

- Bernatchy, Jessica M
- Moses, Denise L
- O'Brien, Cameron E

* Bill To: Admin/Prov Fin Ctr

Hide Delivery and Billing

Delivery

Urgent

* Requester: Wallace, Lisa A

Suggested Buyer: Moses

Billing

Project: []

Task: []

Award: []

Last Name	First Name	Name	Employee Number	Email	Location
Moses	Denise	Moses, Denise L	49568	Denise.L.Moses@Dartmouth.edu	Dartmouth College

GL Date: 03-Jun-2021

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	Web Design Services	EACH	4500	1 USD	4,500.00	[]
Total					4,500.00	

Continue Shopping Edit Save Submit

11. Verify that the information is correct. If the information is not correct you can change the Amount or Delete a line item.
 - a. The Confirming Order field is required.
 - i. Select “No” to have a Purchase Order provided to the Supplier.
 - ii. Select “Yes” if the order or an agreement is already in place. A Purchase Order will **not** be sent to the Supplier.

Shopping Cart

* Description: Web Design Services
 Justification:

* When do you need these items?: 22-May-2021 17:00:00
 * Where do they need to be delivered?: LS07 313

Additional Header Information

* Confirming Order: No
 * Capital Expense: No
 * Bill To: Admin/Prov Fin Ctr

▶ Show Delivery and Billing

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	Web Design Services	EACH	4500	1 USD	4,500.00	
Total					4,500.00	

Buttons: Continue Shopping, **Edit** (highlighted with red arrow), Save, Submit

12. To verify and to change the chart string click on “Edit”. The Edit and Submit Requisition Window will open.

iProcurement | Shopping Cart (1) | Home | Favorites | Settings | Worklist | Logged In As D1257R6 | Help | Logout

Shop | Requisitions | Post Award Requests | Receiving | Assessments | Feedback

Home | Shopping Lists | Non-Catalog Request

Edit and Submit Requisition 466775 | Check Funds | Refresh | Save | Printable Page | Submit

* Indicates required field

Total: 4,500.00 USD | Notify me with status updates for my Purchase Order

* Description: Web Design Services
 Justification:

Additional Information

* Confirming Order: No
 * Capital Expense: No
 * Bill To: Admin/Prov Fin Ctr

Select Lines: Update | Copy | Delete | ***

Details	Item Number	Description	Quantity	Unit	Price	Amount (USD)	Need By Date	Deliver-To Location	Attachment	SpotBuy Suppliers	Delete
<input type="checkbox"/>		Web Design Services	4500	EACH	1 USD	4,500.00	22-May-2021 17:00:00	LS07 313 Enter one-time address			

Supplier | **Delivery**

New Supplier	No	Urgent	No
Supplier	Skyline Designs	Need-By Date	22-May-2021 17:00:00
Site	NewportNH	Requester	Wallace, Lisa A
Contact Name		Deliver-To Location	LS07 313

Red Arrow: Points to the 'Details' column header in the line items table.

- To add a Note to Buyer, Supplier, or Receiver, or to edit the chart string, for an item, check the box next to the line and click "Update" above the Line (note if you select multiple lines, you will only be able to update to a PTAE0)

Select Lines: Update Copy Delete

Details	Item Number	Description	Quantity	Unit	Price	Amount (USD)	Need By Date	Deliver-To Location	Attachment	SpotBuy	Suppliers	Delete
<input checked="" type="checkbox"/>		Web Design Services	4500	EACH	1 USD	4,500.00	22-May-2021 17:00:00	LS07 313 Enter one-time address				

Supplier

New Supplier: No
 Supplier: Skyline Designs
 Site: NewportNH
 Contact Name:
 Phone:
 Fax:
 Email:
 Supplier Onboarding Status:
 Supplier Item:
 Manufacturer:
 Manufacturer Part Number:

Delivery

Urgent: No
 Need-By Date: 22-May-2021 17:00:00
 Requester: Wallace, Lisa A
 Deliver-To Location: LS07 313
 Destination Type: Expense
 P-Card Used: No

Note To Supplier:

Distributions

Line	Charge Account	Project Number	Task Number	Award Number	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent	Quantity	Amount
1	20.507.368000.343624.0000.8151							100	4500	4500
Total										4,500.00

Requisition Information: Updated Selected line window will open.

Requisition Information : Update Selected line

Item

Description: Web Design Services
 Category: Services.Web Design
 Amount: 4,500.00
 Currency: USD

Supplier

New Supplier
 Supplier: Skyline Designs
 Site: NewportNH
 Contact Name:
 Phone:
 Fax:
 Email:
 Supplier Item:
 Manufacturer:
 Manufacturer Part Number:

Delivery

Urgent
 Need-By Date: 22-May-2021 17:00:00
 Requester: Wallace, Lisa A
 Deliver-To Location: LS07 313
 Enter one-time address

Notes

Note To Buyer:

Note To Supplier:

Note To Receiver:

Billing

Line	DC Account String	GL Date	Project	Task	Award	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent	Quantity	Amount (USD)	Delete
1	20.507.368000.343624.0000.8151 ENTITY.ORG.FUNDING.ACTIVITY.SUBACTIVITY.NATURAL_CLASS	20-May-2021							100	4500	4,500.00	
Total										100	4500	4,500.00

TIP Total allocation must equal 100% of the selected line values.
 Apply this Cost Allocation information to all applicable requisition lines

Cancel Apply

- Add any note necessary for the purchase in the Notes section of the form

- To change the chart string to a different GL chart string, place your cursor in the DC Account String field and enter new chart string.

Billing

Line DC Account String

1 20.507.368000.343624.0000
ENTITY.ORG.FUNDING.ACTIVITY.SUBACTIVITY.NATURAL_CLASS

16. To search for a chart string or use an Alias you have previously created, click on the search tool  and the DC Account String finder will open.

17. If you have an Account Alias set up, you can search for those Aliases.

18. Otherwise, you can search any account segment by segment number or Description.

19. Once located, select the radio button next to the value, and click "Select"

20. Once all segments are identified in the search section, click "Create"

The new Account String will be created

21. Select the radio button next to the chart string that was created

22. Click "Select" in the upper right-hand of the window

You will be returned to the Requisition Information: Updated Selected line window.

23. To change the chart string to a PTAE0, first delete the DC Account String and enter the Project, Task, Award, Expenditure Type, and Expenditure Organization in the appropriate fields and enter an Expenditure Item Date.

Requisition Information : Update Selected line

Item Description: Web Design Services
 Category: Services.Web Design
 Amount: 4,500.00
 Currency: USD

Supplier: Skyline Designs
 Site: NewportNH

Delivery: Urgent
 Need-By Date: 22-May-2021 17:00:00
 Requester: Wallace, Lisa A
 Deliver-To Location: LS07 313

Notes: Note To Buyer, Note To Supplier, Note To Receiver

Billing

Line	DC Account String	GL Date	Project	Task	Award	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent	Quantity	Amount (USD)	Delete	
1	20 507 368000 343624 0000 8151 ENTITY.ORG.FUNDING.ACTIVITY.SUBACTIVITY.NATURAL_CLASS	20-May-2021							100	4500	4,500.00		
									Total	100	4500	4,500.00	

TIP Total allocation must equal 100% of the selected line values.
 Apply this Cost Allocation information to all applicable requisition lines

Buttons: Cancel, Apply

Project	Task	Award	Expenditure Type	Expenditure Organization	Expenditure Item Date

Total

24. To add attachments, scroll to the Requisition Attachments section and click Add Attachments

Requisition Attachments

Add Attachment

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

The Add Attachment window will open

25. Add a Title and Description if you prefer and using the dropdown arrow in Category, select "To Buyer".

Add Attachment

Attachment Type: File

Title:

Description:

Category: Internal to Requisition

*File: No file selected.

Buttons: Cancel, Add Another, Apply

Category dropdown menu:

- Internal to Requisition
- Miscellaneous
- To Approver
- To Buyer
- To Receiver
- To Supplier

26. Next Click “Browse” to navigate your computer and attach the necessary document.
27. Click “Add Another” to add additional attachments, each time changing the Category “To Buyer”
28. Click “Apply” when done adding attachments.

Add Attachment

Attachment Type: File

Title: 2021-05-26 09:06:54 lilmay2021.r

Description: 2021-05-11 05:32:43 lilmay2021.pdf (Size :1664138)

Category: To Buyer

*File: Browse... lilmay2021.pdf

Buttons: Cancel, Add Another, Apply

29. Click “Submit” at the top or bottom of the page, when all information is complete.

Buttons: Check Funds, Refresh, Save, Printable Page, Submit

You will receive a confirmation with your Requisition ID. Your request will be routed through Approval workflow if necessary and then to the Procurement Buyer for processing.

Confirmation

Requisition 865951 has been submitted.

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