

Logging into Oracle

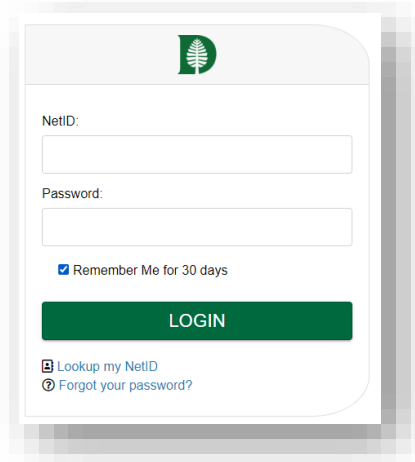
Step 1:

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

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

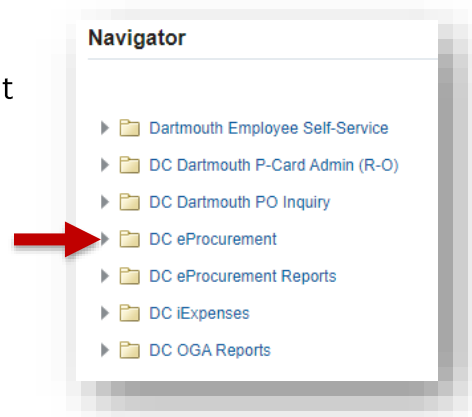
Step 2:

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

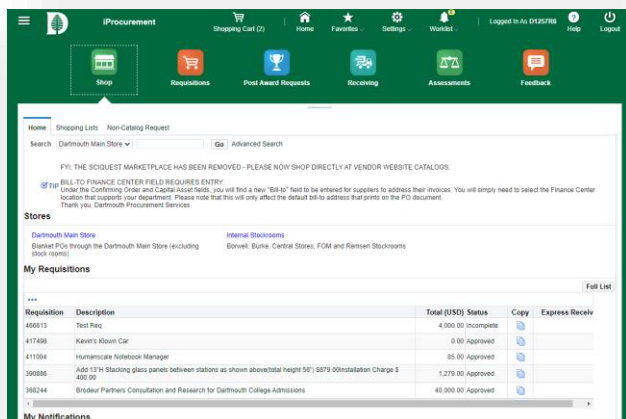
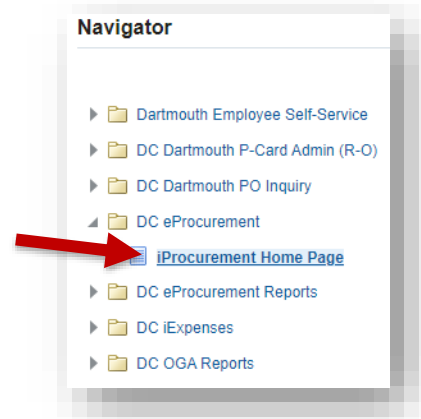


The folder opens and a list of modules appear.

Step 4:

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

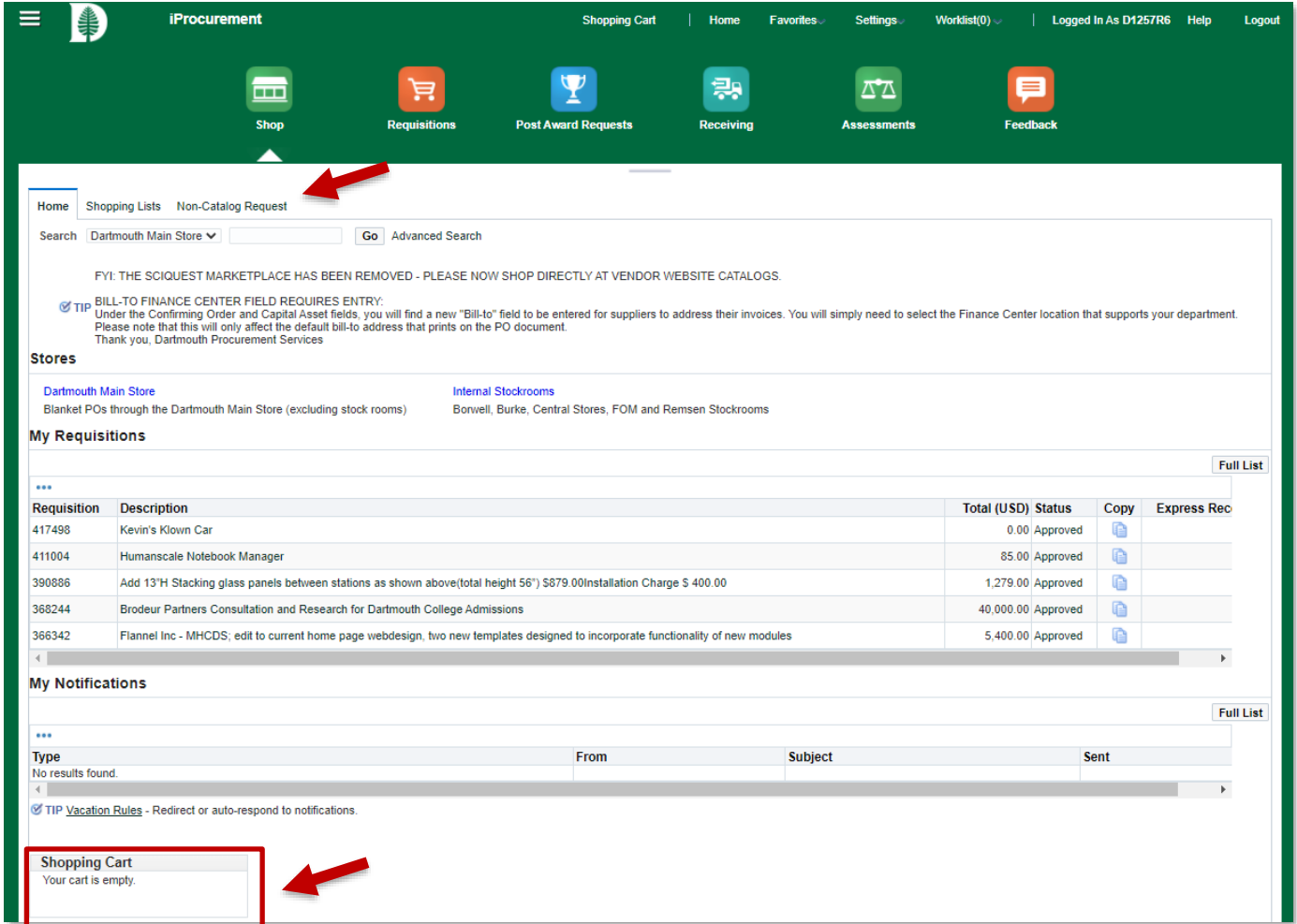
The module opens (in this example, the iProcurement Home Page) and you operate as you normally do.



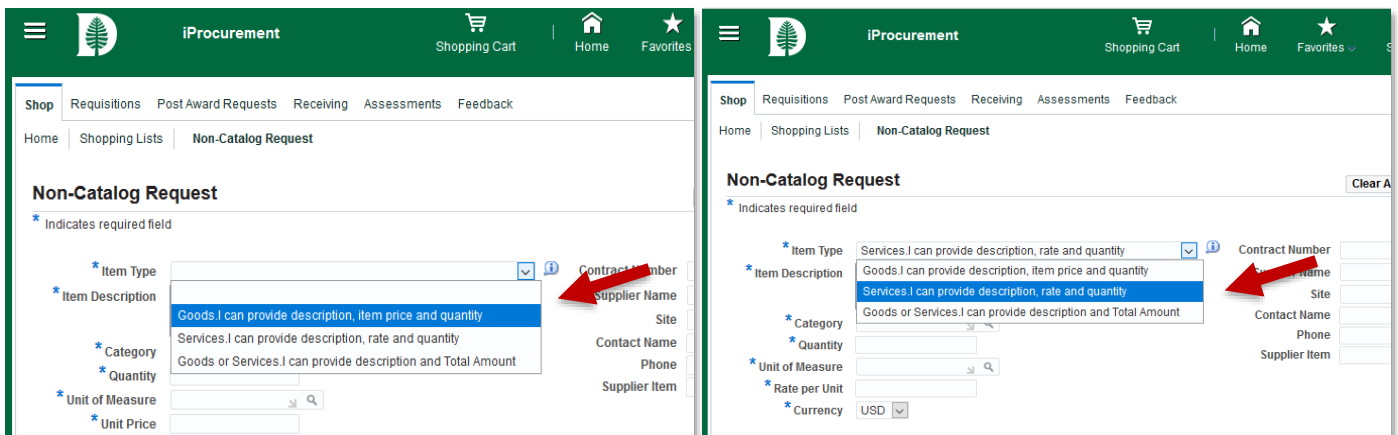
Creating a Quantity-based Purchase Requisition (Non-Catalog Request)

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



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. I can provide description, item price and quantity” or “Services. I can provide description, rate and quantity”.



2. Enter Item Description.
3. Select the Category. If needed, click on the flashlight search.
4. Enter the Quantity, Unit of Measure, Unit Price or Rate per Unit. Since this is a quantity 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.
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.

The screenshot shows the 'Non-Catalog Request' form in a web application. The form is titled 'Non-Catalog Request' and has a navigation bar with 'Home', 'Shopping Lists', and 'Non-Catalog Request'. The form contains several fields:

- Item Type:** Services.I can provide description, rate and quantity
- Item Description:** Web Design
- Category:** Services.Web Design
- Quantity:** 50
- Unit of Measure:** HOUR
- Rate per Unit:** 50
- Currency:** USD
- Contract Number:** (empty)
- Supplier Name:** Lulu Web Design
- Site:** HartlandFourCrn
- Contact Name:** (empty)
- Phone:** (empty)
- Supplier Item:** (empty)

 At the top right of the form, there are three buttons: 'Clear All', 'Add to Favorites', and 'Add to Cart'. A red arrow points to the 'Add to Cart' button. To the right of the form, there is a 'Shopping Cart' section with a button that says 'Click here to add item to shopping cart'.

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

The screenshot shows the 'Non-Catalog Request' form after the item has been added to the cart. The form fields are:

- 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:** (empty)
- Supplier Name:** Skyline Designs
- Site:** NewportNH
- Contact Name:** (empty)
- Phone:** (empty)
- Supplier Item:** (empty)

 The 'Add to Cart' button is now disabled. The 'Shopping Cart' section on the right shows 'Your cart contains 1 line.' and 'Recently Added Lines' with a table:

Item	Amount	Currency
Web Design Serv...	4,500.00	USD

 A red arrow points to the 'View Cart and Checkout' button at the bottom of the shopping cart section.

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.
10. Verify that the information is correct. If the information is not correct you can change the Amount or Delete a line item.
11. The Confirming Order field is required.

- a. Select “No” to have a Purchase Order provided to the Supplier.
- b. Select “Yes” if the order or an agreement is already in place. A Purchase Order will **not** be sent to the Supplier.

The screenshot shows a 'Shopping Cart' window with the following details:

- Description: Web Design Services
- 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

A table below shows the cart items:

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 at the bottom: Continue Shopping, Edit, Save, Submit.

12. 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

The screenshot shows the 'Suggested Buyer' dropdown menu open, displaying a list of buyers:

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

A red arrow points to the 'Suggested Buyer' field.

Buttons at the bottom: Continue Shopping, Edit, Save, Submit.

13. To verify and to change the chart string click on “Edit”

The screenshot shows the 'Shopping Cart' window with the following details:

- Description: Test 2, create a req. under \$2500, Pre-Filters for Bedding Dispense
- When do you need these items?: 01-Apr-2021 17:00:00
- Where do they need to be delivered?: LS07 302
- Requester: Gibson, Genevieve R
- Expenditure Organization: (30-Mar-2021)
- GL Date: 30-Mar-2021

A table below shows the cart items:

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	Test 2, create a req. under \$2500, Pre-	EACH	10	56.75 USD	567.50	
Total					567.50	

A red arrow points to the 'Edit' button.

Buttons at the bottom: Continue Shopping, Edit, Save, Submit.

The Edit and Submit Requisition Window will open.

Click the arrow in details to display line details.

Shop Requisitions Post Award Requests Receiving Assessments Feedback

Home Shopping Lists Non-Catalog Request

Edit and Submit Requisition 865922

* Indicates required field

Total 667.60 USD

* Description Test 2, create a req. under \$2500, Pre-Filters for Bedding Dispenser

Justification

Select Lines: Update Copy Delete | ***

<input type="checkbox"/> Details	Item Number	Description	Quantity	Unit
<input type="checkbox"/>		Test 2, create a req. under \$2500, Pre-Filters	10	EACH

Supplier

New Supplier No
Supplier Techniplast USA Inc
Site WESTCHESTERPA
Contact Name Kentzel, Judi
Phone
Fax
Email
Supplier Onboarding Status
Supplier Item
Manufacturer
Manufacturer Part Number

Note To Supplier

Distributions

Line	Charge Account	Project Number	Task Number	Award Number
1	20.507.368000.343624.0000.7511			

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 | ***

<input checked="" type="checkbox"/> 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.

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

The screenshot shows the 'Requisition Information: Update Selected line' window. It has three main sections: Item, Supplier, and Delivery. The 'Notes' section is at the bottom left, containing three text boxes: 'Note To Buyer', 'Note To Supplier', and 'Note To Receiver'. A red box highlights the 'Note To Buyer' field, with a red arrow pointing to it from the right.

15. 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.

This is a close-up of the 'Billing' section of the requisition form. It shows a table with one row for 'Line DC Account String'. The value '20.507.368000.343624.0000' is entered in the field. A search icon is to the right of the field. A red arrow points to the search icon.

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 Alias.

The screenshot shows the 'DC Account String' search dialog box. It has a 'Search and Select' section with 'Cancel' and 'Select' buttons. Below that is a 'Shorthand Alias' field. The 'Search' section contains a list of search results with radio buttons next to each value. A red arrow points to the 'NATURAL_CLASS' field in the search results.

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"

This screenshot shows the 'Search and Select: NATURAL_CLASS' dialog box. It has a search bar and a 'Go' button. Below the search bar is a table with columns for 'Select', 'Description', 'NATURAL_CLASS', and 'Description'. A red arrow points to the 'Description' column header.

This screenshot shows the 'Search and Select: NATURAL_CLASS' dialog box with search results. The results table has columns for 'Select', 'Quick Select', 'NATURAL_CLASS', and 'Description'. A red arrow points to the 'Quick Select' radio button.

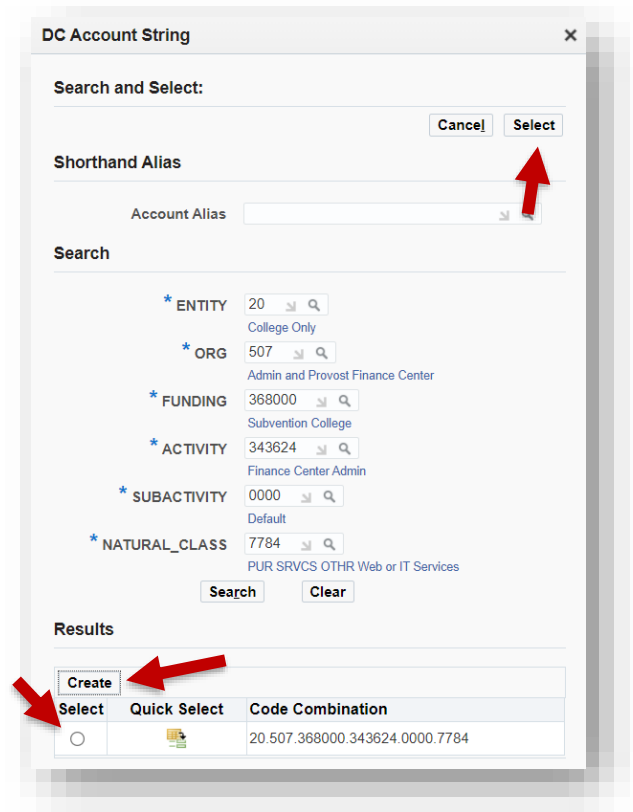
20. Once all segments are identified in the search section, click "Create"

The new Account String will be created

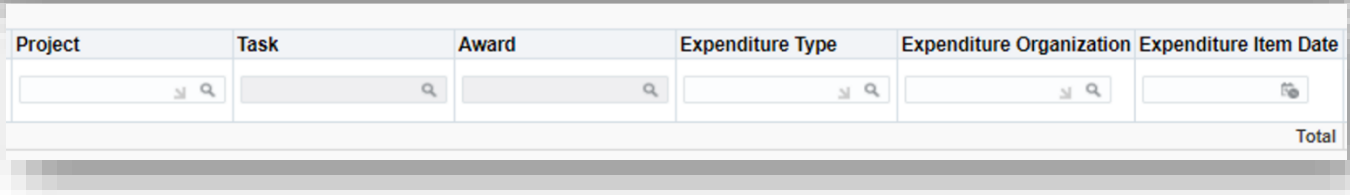
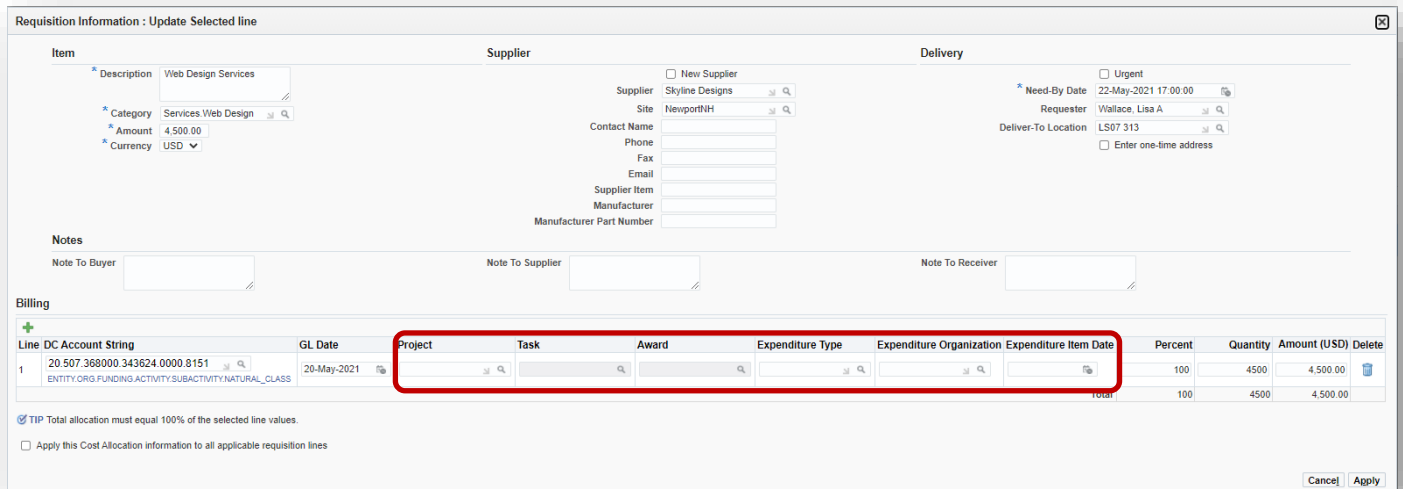
21. Select the radio button next to the chart string that was created

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

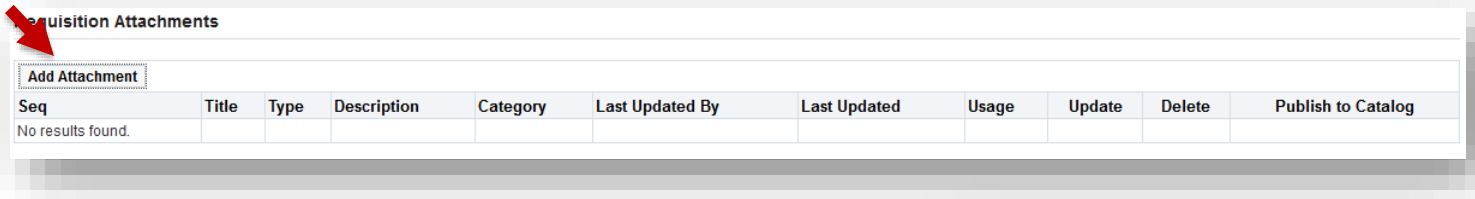
You will be returned to the Requisition Information: Updated Selected line window.



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.

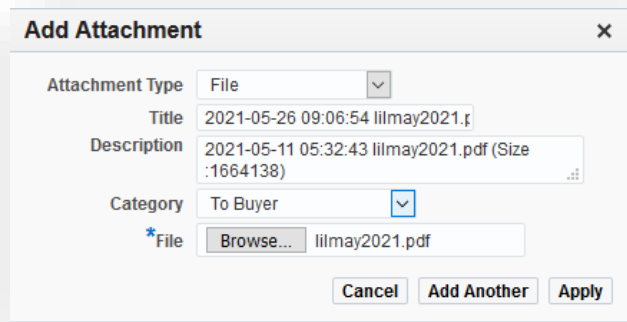
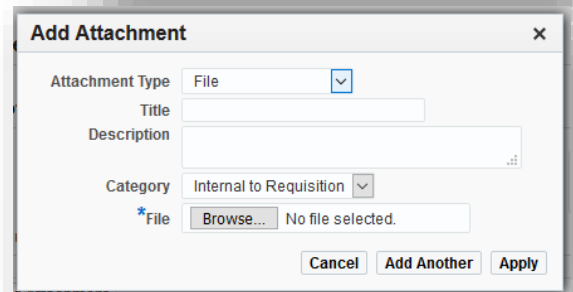
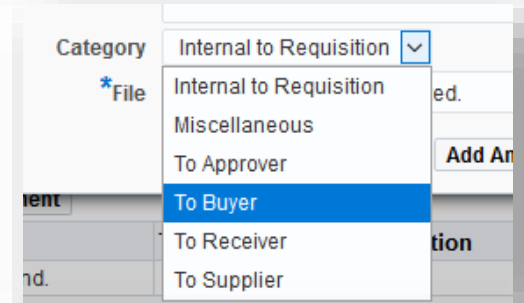


24. To add attachments, scroll to the Requisition Attachments section and click Add Attachments

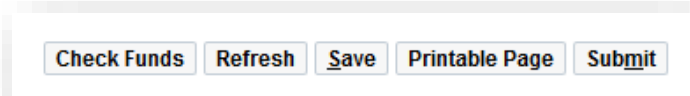


The Add Attachment window will open

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



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



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.

