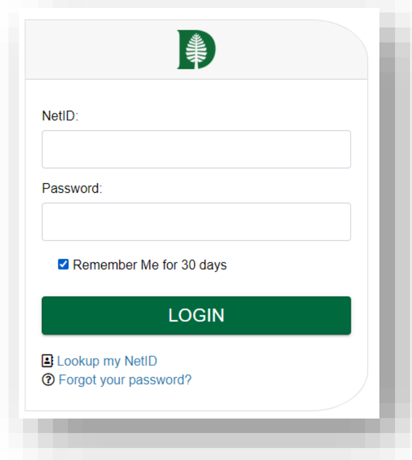
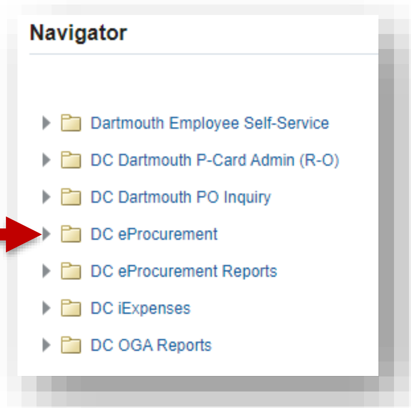
Logging into Oracle

Step 1:
Go to [Oracle:
https://oa.dartmouth.edu:8007/OA_HTML/AppsLogin](https://oa.dartmouth.edu:8007/OA_HTML/AppsLogin)



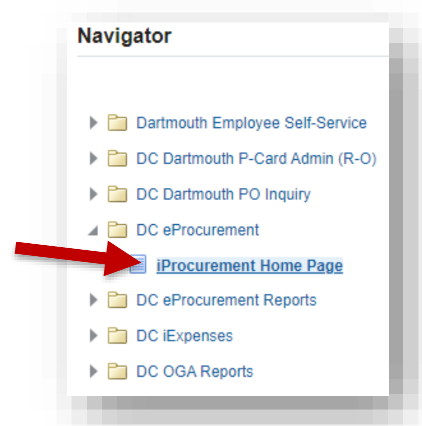
Step 2:
Log in to Single Sign-On (SSO) Web Authentication

Step 3:
Click on the arrow next to the responsibility you want to access in the Navigator

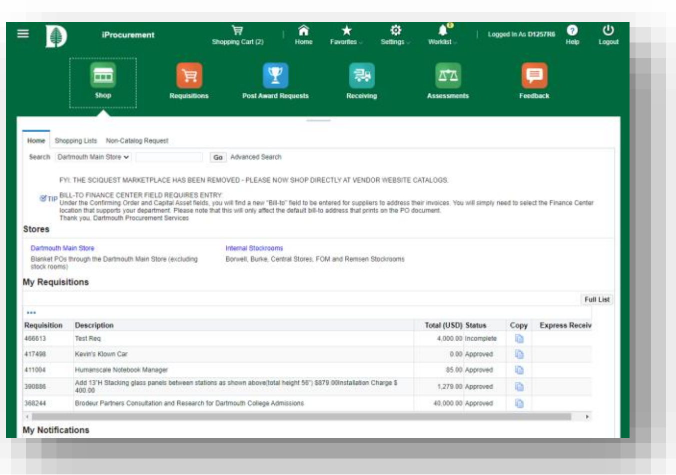


The folder opens and a list of modules appear.

Step 4:
Click on the name of the module you want to open.



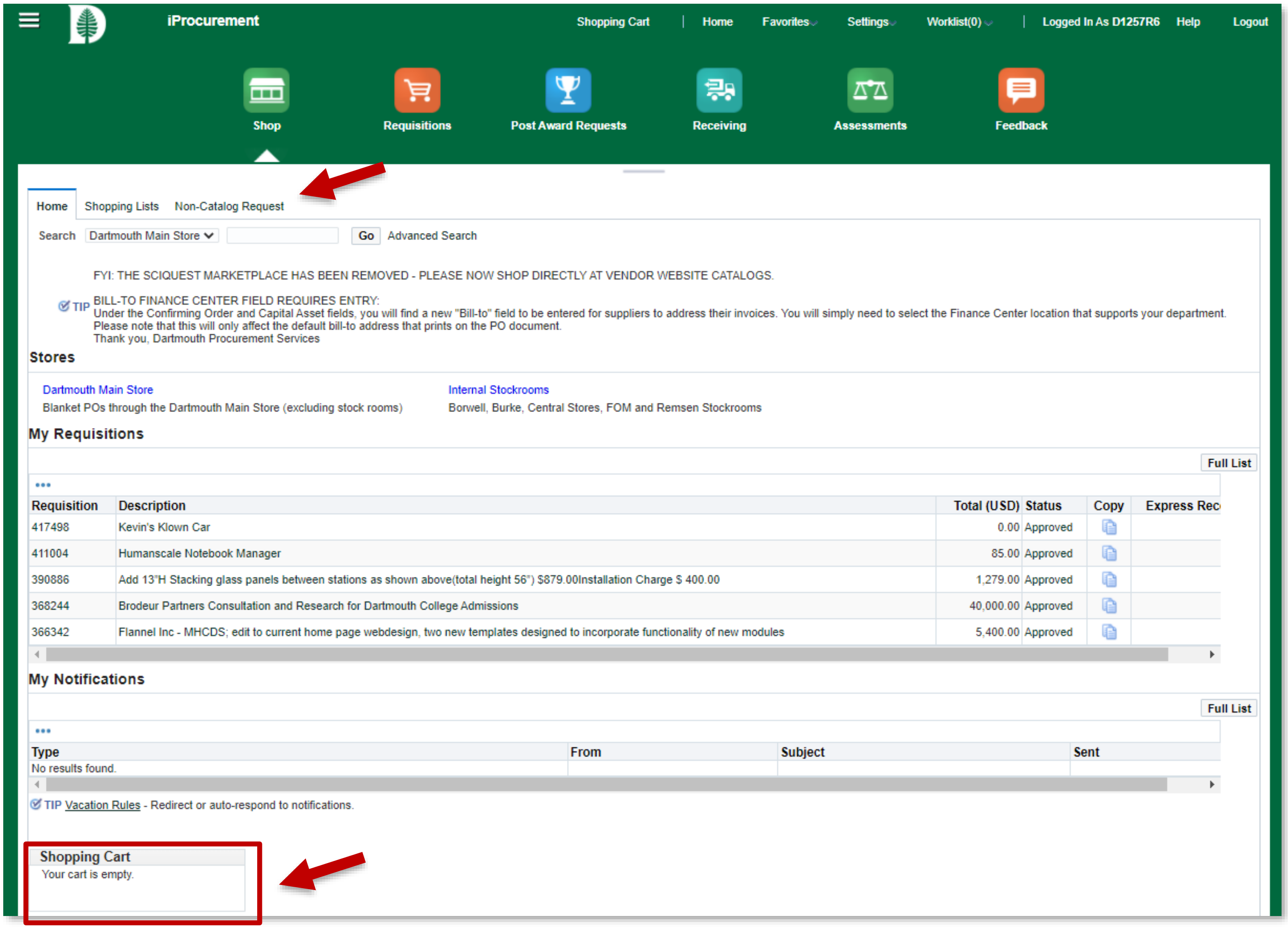
The module opens
(in this example, the iProcurement Home Page)
and you operate as you normally do.



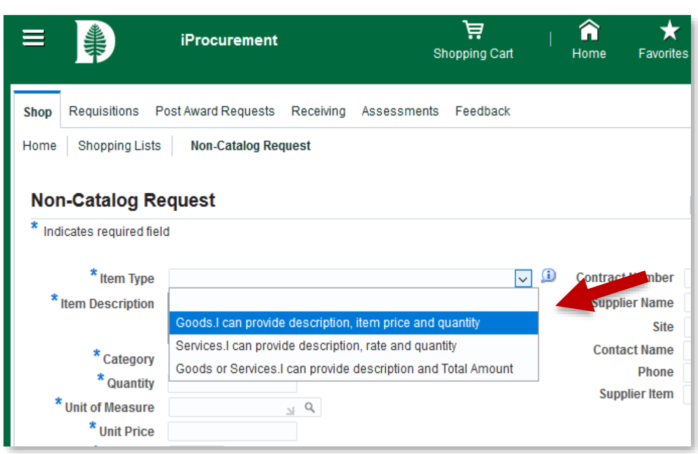
Creating a Quantity-based Purchase Requisition (Non-Catalog Request)

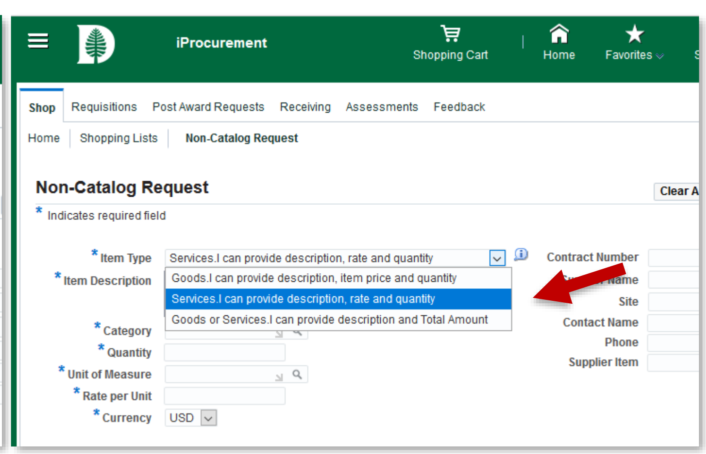
Step 1: Make sure the Shopping Cart is empty. The Shopping Cart is located below the "My Notifications" near the bottom of the page, is empty.

Step 2: Click on Non-Catalog Request

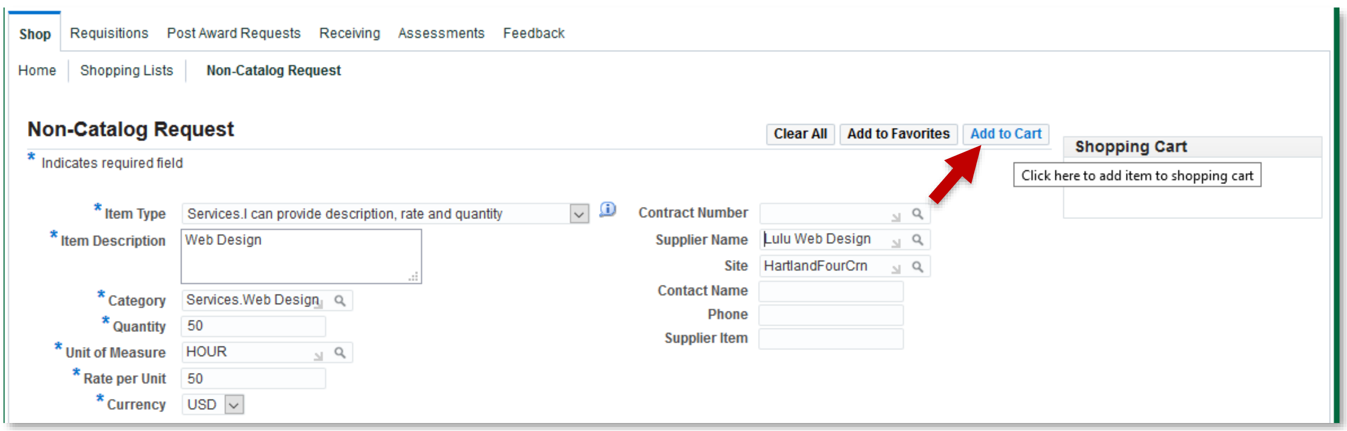


1. Choose the appropriate Item Type. Use the arrow at the end of the field to see choices. For this exercise we will choose "Goods. I can provide description, item price and quantity" or "Services. I can provide description, rate and quantity".

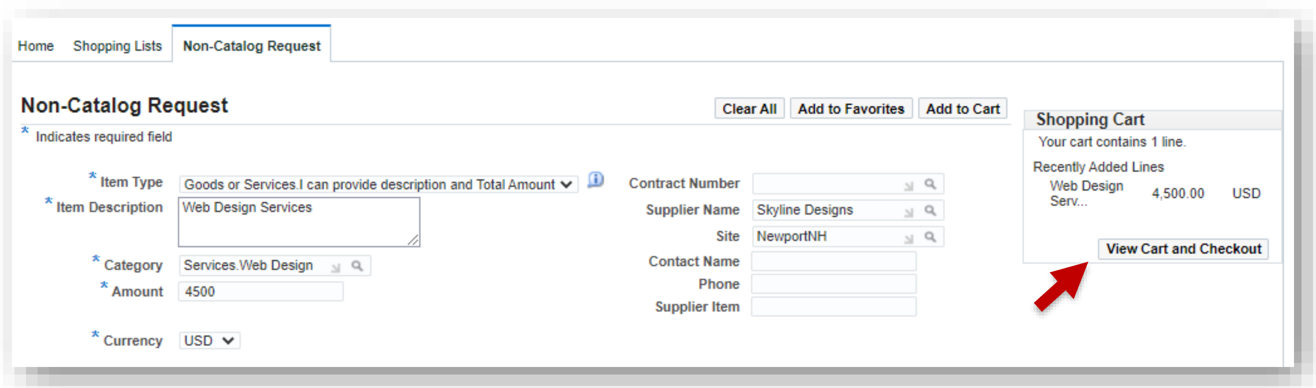




2. Enter Item Description.
3. Select the Category. If needed, click on the flashlight search.
4. Enter the Quantity, Unit of Measure, Unit Price or Rate per Unit. Since this is a quantity based line you will want to enter the exact amount for the goods/services if known. If you don't know the exact amount 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.

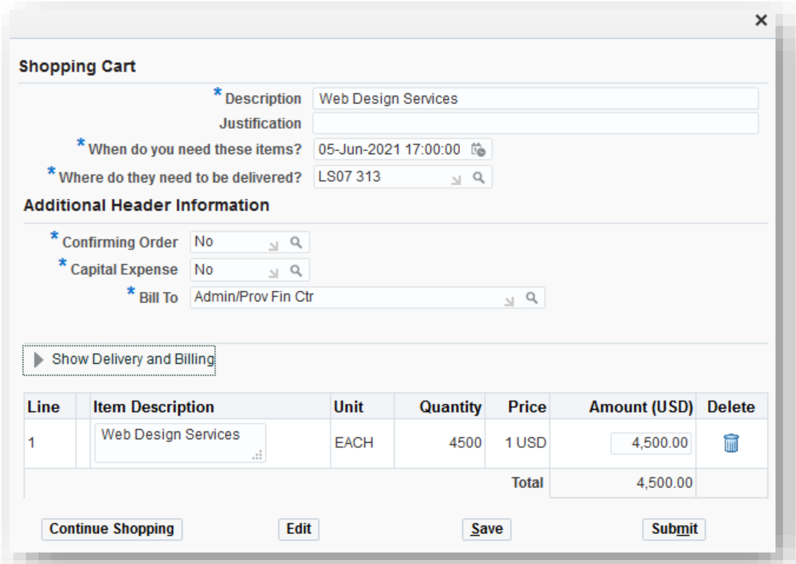


This is what the screen will look like after following the previous steps.



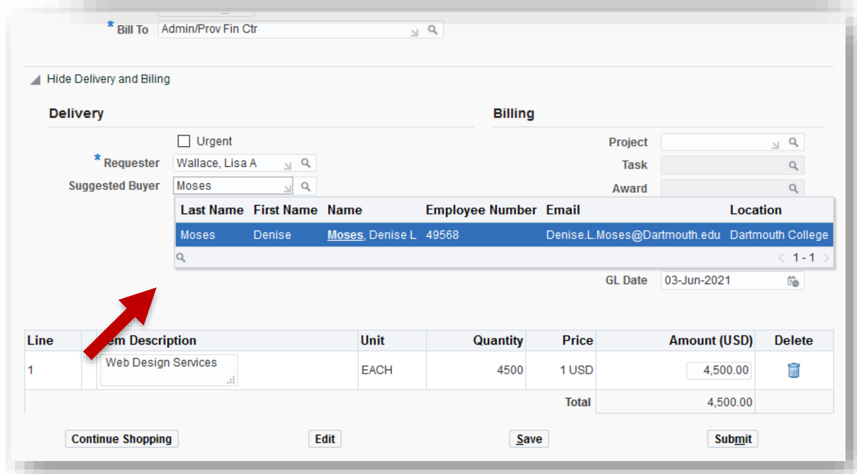
8. Click on "View Cart and Checkout" and the Shopping Cart will open.

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.

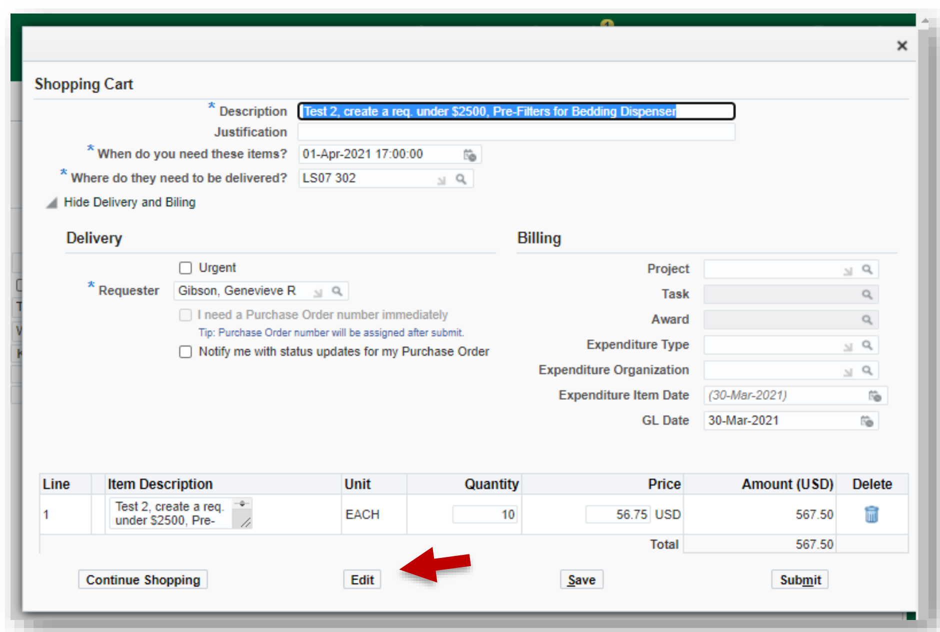


12. In the Suggested Buyer field enter the Procurement Buyer name (last name first) based on the item being purchased.

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

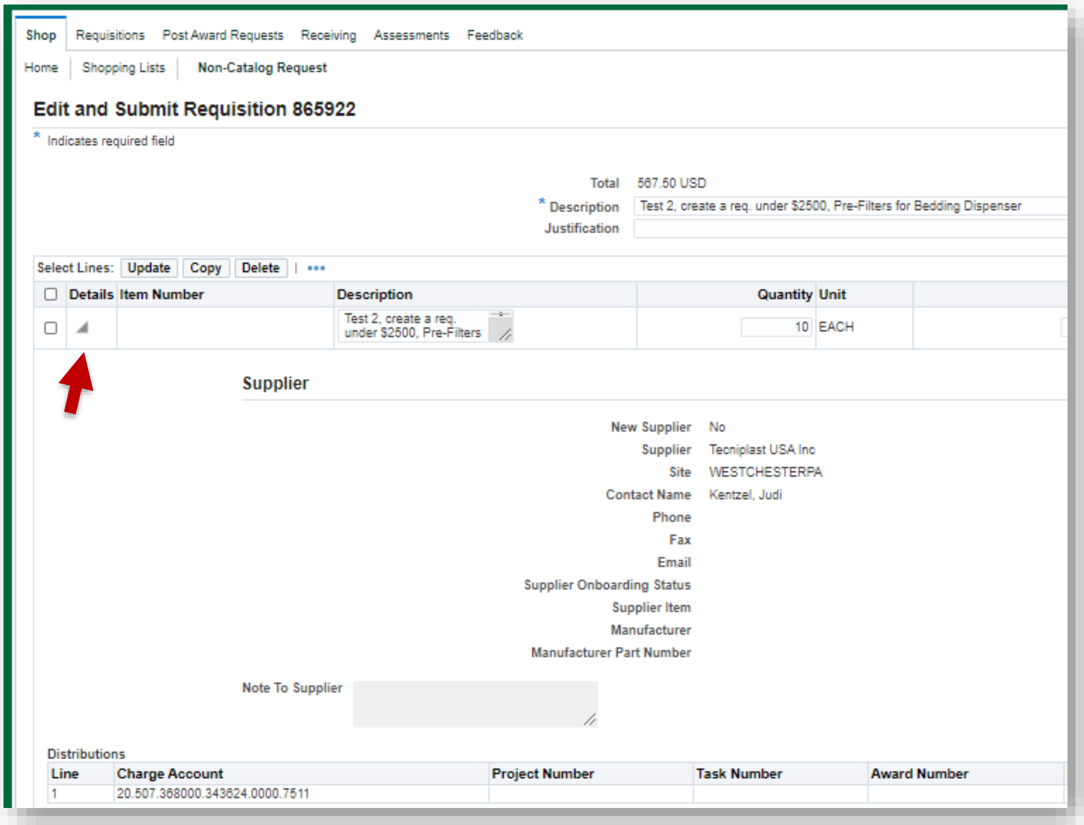


13. To verify and to change the chart string click on “Edit”

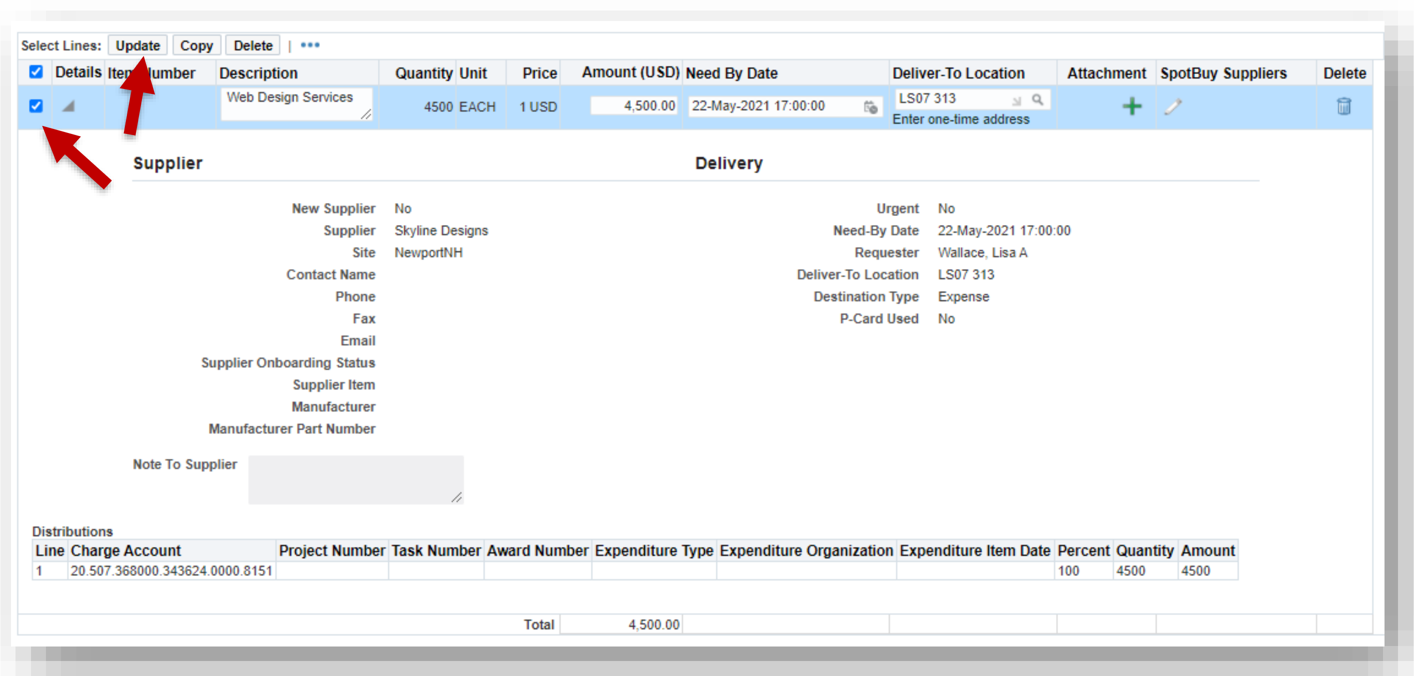


The Edit and Submit Requisition Window will open.

Click the arrow in details to display line details.

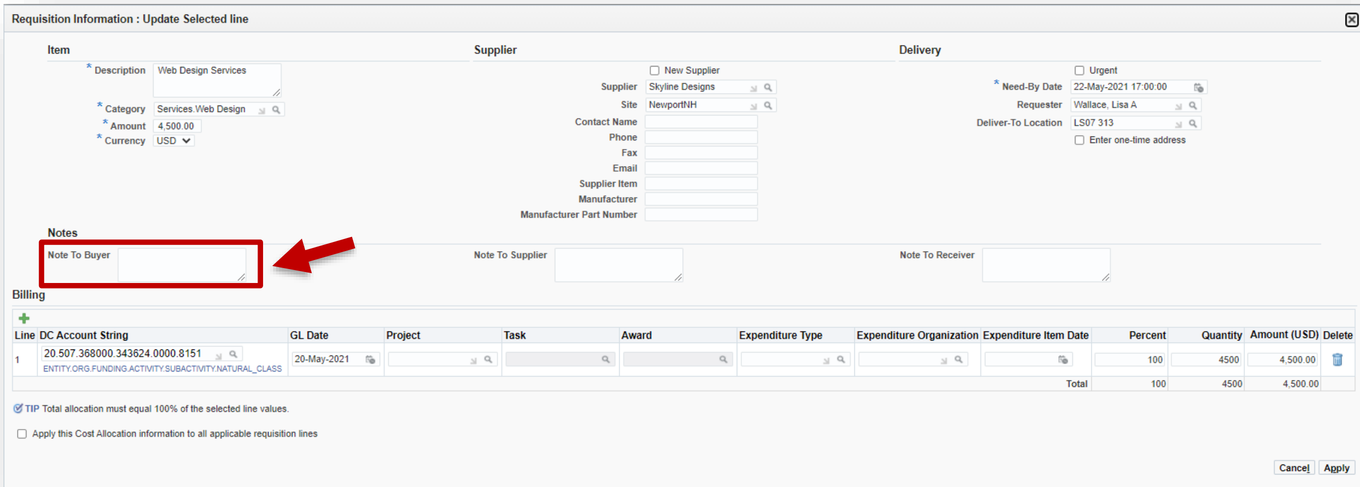


To add a Note to Buyer, Supplier, or Receiver, or to edit the chart string, for an item, check the box next to the line and click "Update" above the Line (note if you select multiple lines, you will only be able to update to a PTAEO)

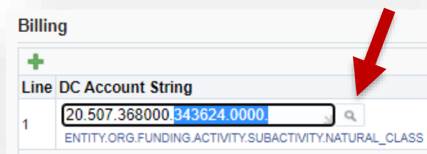


Requisition Information: Updated Selected line window will open.

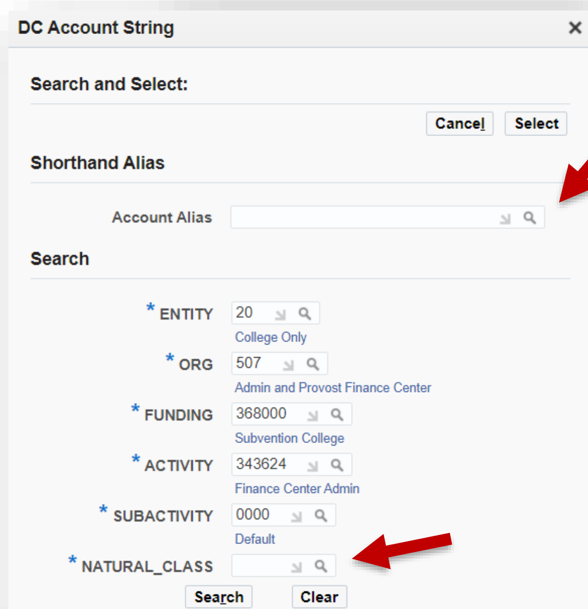
14. Add any note necessary for the purchase in the Notes section of the form



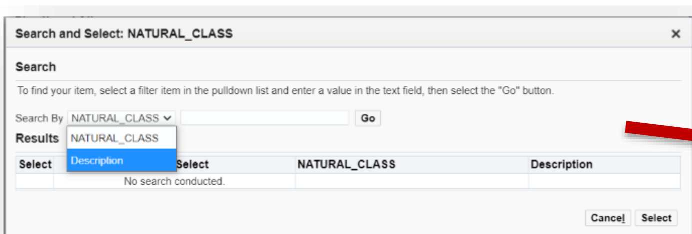
15. To change the chart string to a different GL chart string, place your curser in the DC Account String field and enter new chart string.

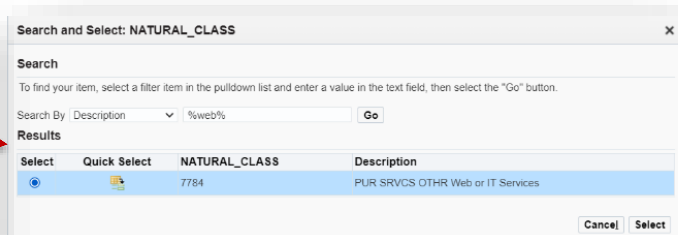


16. To search for a chart string or use an Alias you have previously created, click on the search tool and the DC Account String finder will open.
17. If you have an Account Alias set up, you can search for those Alias.



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"





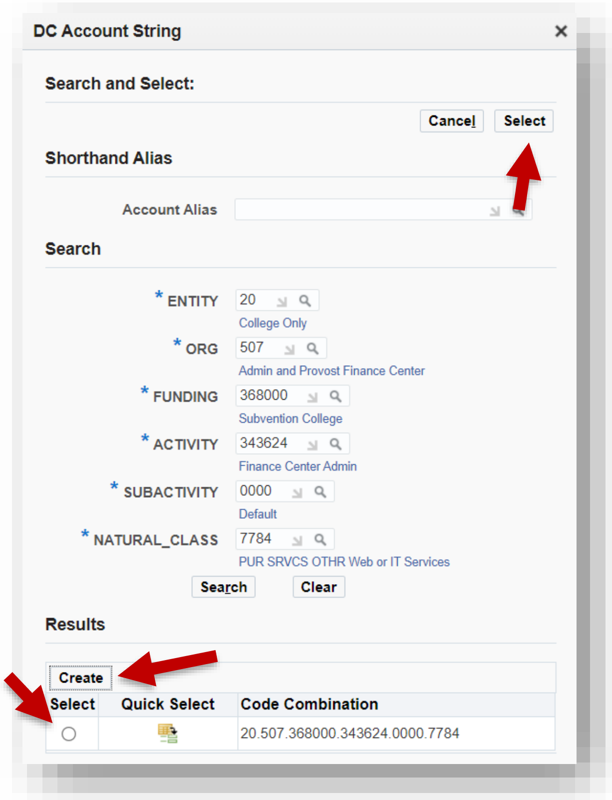
20. Once all segments are identified in the search section, click “Create”

The new Account String will be created

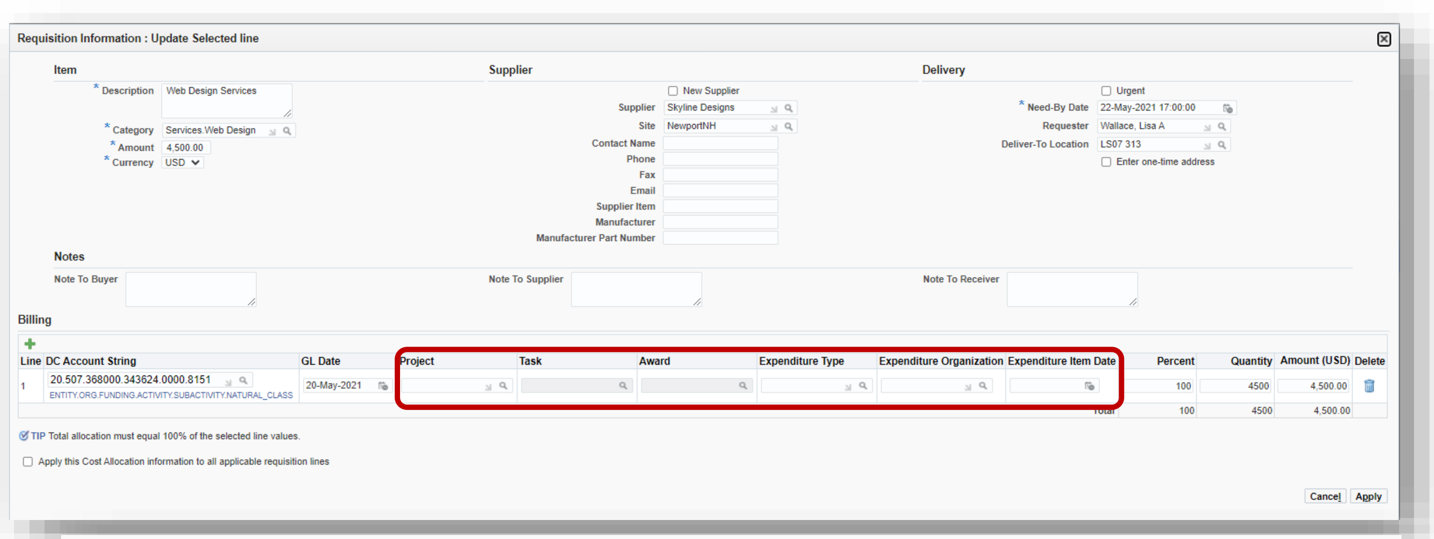
21. Select the radio button next to the chart string that was created

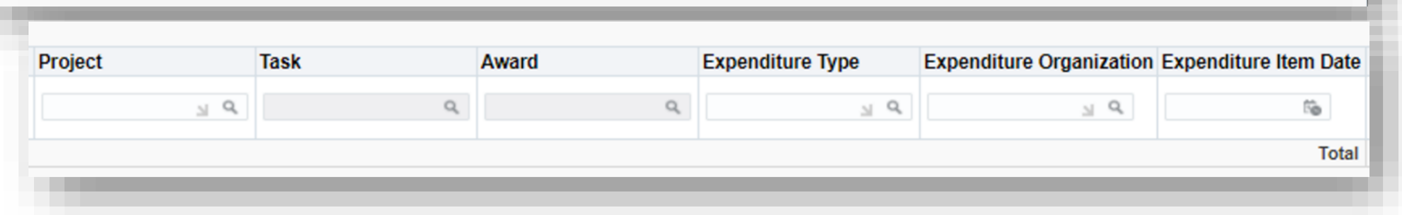
22. Click “Select” in the upper right-hand of the window

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

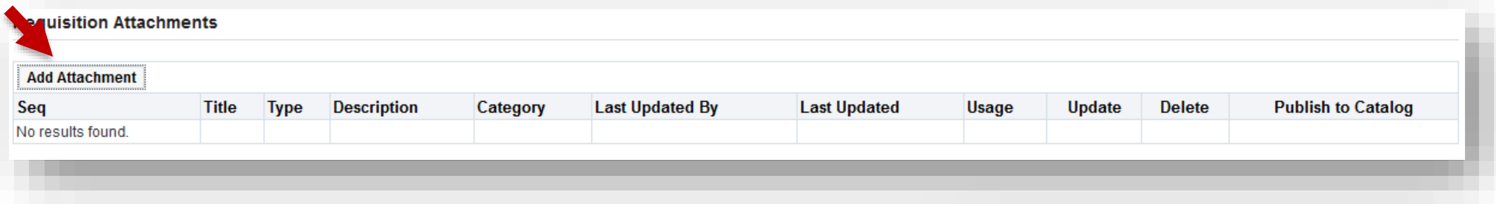


23. To change the chart string to a PTAEO, first delete the DC Account String and enter the Project, Task, Award, Expenditure Type, and Expenditure Organization in the appropriate fields and enter an Expenditure Item Date.

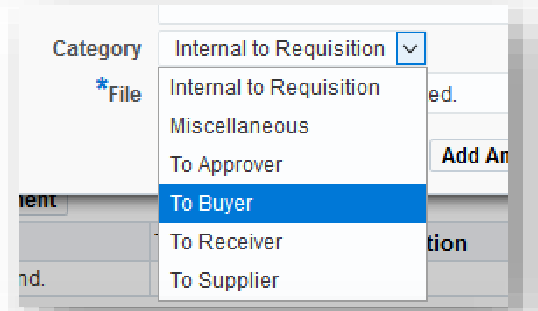




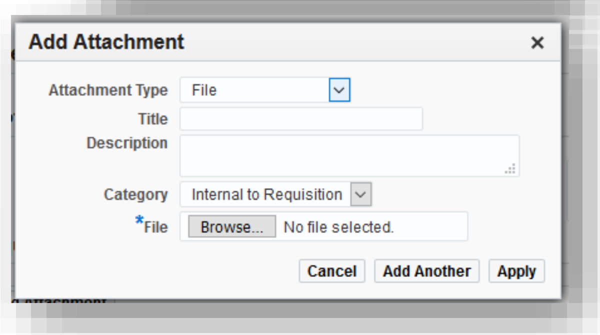
24. To add attachments, scroll to the Requisition Attachments section and click Add Attachments

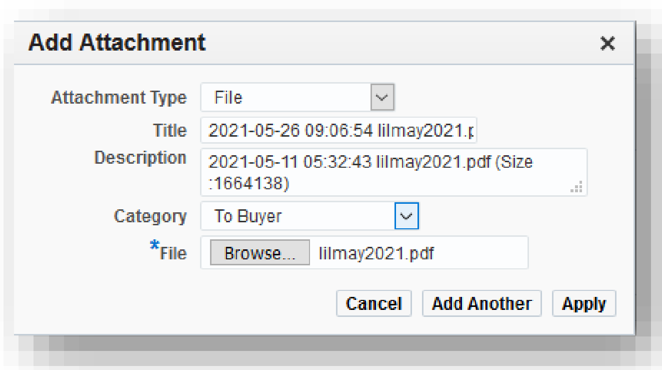


The Add Attachment window will open

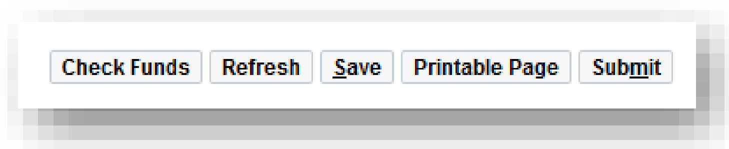


25. Add a Title and Description if you prefer and using the dropdown arrow in Category, select “To Buyer”.
26. Next Click “Browse” to navigate your computer and attach the necessary document.
27. Click “Add Another” to add additional attachments, each time changing the Category “To Buyer”
28. Click “Apply” 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.