

## Procurement FAQs

May 1, 2019

1. Can you split charges on a requisition?

Yes. When purchasing through Oracle via a punchout or non-catalog requisition, you can split purchases by percentage, quantity, or amount. For step-by-step instructions, please see [PunchOut Requisitions - Section 3.0](#) or [Non-Catalog Requisitions - Section 4.0](#). *(Answered by Cheryl Foster, GMHEC)*

2. Can you batch approve purchases?

Approvals are always at the document level. There is no way to batch up multiple documents into one approval. However, the requester can include requisition lines from multiple sources on the same requisition. So, a single requisition could have punch-out lines from Amazon and WB Mason plus a laptop computer from another vendor plus another product or service where the vendor is yet to be determined. If all of the lines are going to the same department or designation then there is one approval for the requisition. *(Answered by David Reeves, Hitachi)*

3. Is there an approval threshold?

Purchases less than \$500.00 do not require approval. The budget manager will receive an "FYI" notifying him/her of the purchase. If the purchase is \$500.00 or more, it will require an approval. Hopefully, this will satisfy the need to not approve every order that goes through each department. *(Answered by Cheryl Foster, GMHEC)*

4. If my purchase is rejected will I know why? Are there comments?

Yes. By procedure, approvers should not reject without entering a comment or reason, lest they risk having it re-submitted without the necessary changes. However, the system does not require a comment be entered. *(Answered by David Reeves, Hitachi)*

5. Our delivery address is currently our legal entity address. However, this is not where things should be delivered. Can this be specified for each user or updated?

Yes. Please see reference guide [Set Preferences - 1.0](#) on instructions on how to create a default for your delivery address as well as any charge accounts (EDORDAs) you would like to add. W.B. Mason desktop delivery addresses have been added to the list of delivery locations, should you require it. *(Answered by Cheryl Foster, GMHEC)*

6. Are we going to be keeping our same Pcards?

Yes, you will continue to use your same Pcard.

7. How do I search for my delivery address? Once found, can I update my default delivery location?

To find steps in searching for your delivery address, please see reference guide "[Set Preferences - Section 1.0](#)". This document will also walk you through defaulting your delivery address and charge account (EDORDA) preferences. *(Answered by Cheryl Foster, GMHEC)*

8. For searches, is it case sensitive?

No. Searches are not case sensitive. *(Answered by Cheryl Foster, GMHEC)*

9. How do we add new locations?

Please contact your local helpdesk to request a new delivery location. This function does not reside with individual users and will need to be added by an Oracle administrator. *(Answered by Cheryl Foster, GMHEC)*

10. Can you add any company to the PunchOuts?

Due to the high complexity of adding a PunchOut company, as well as strategizing what companies would be the best fit for our member institutions, the role of adding PunchOut companies to Oracle resides at the Consortium. If/when new PunchOut suppliers will be added, an announcement will be made prior to the new PunchOut supplier go live. *(Answered by Cheryl Foster, GMHEC)*

11. Can you see a chain of approvers in a Purchase Order? If so, how?

Yes. You can. Please see reference guide "[Purchase Orders - 6.0](#)" *(Answered by Cheryl Foster, GMHEC)*

12. Can someone go direct to a Punch Out Vendor and buy something on a Pcard?

No. All PunchOut purchases are paid via invoice.

13. Do we always have to do Purchase Orders?

Currently we are only doing purchase orders for guest speakers, and for companies that we sent POs to in the old system. Please refer to the [Procurement Workflow Chart](#) available on the GMHEC website so you are aware of when you need to access Oracle for purchase orders. If you have and currently do purchase orders with suppliers, you can also access the approved [PO suppliers list](#). *(Answered by Cheryl Foster, GMHEC)*

14. What is a requisition? When is it used?

A requisition is an internal electronic document completed in Oracle. It is used to request your goods or services prior to a purchase order being processed. Please note that the requisition-to-PO process comes *before* the purchase. If you have already received your goods or services, enter your invoice in the payables module. *(Answered by Cheryl Foster, GMHEC)*

15. After you have created a requisition-to-PO and you receive your invoice, if the invoice comes in at a different price than your PO, who gets notified? The requestor or the approver?

Invoices will be sent via email or mail to the requestor. If your invoices comes in at a different price than your purchase order, you will need to process a change order. Please see procurement reference guide "[Purchase Orders Misc. - Section 6.0a](#)" on how to process a change order. If the change order goes over 10% or \$10,000 your approver will need to re-approve the order. *(Answered by Cheryl Foster, GMHEC)*

16. What is the process for Guest Speakers?

- Will I use a PO?
  - Yes. For all guest speakers.
  - Does a PO include speakers travel expenses
  - No. It includes the honorarium only.
  - When do I do a requisition for a speaker? Before or after they come to campus?
  - You will complete the requisition before your speaker comes to campus. Here are the steps you will need to take for completing the Guest Speaker/Independent Contractor requisition:
    1. (Middlebury only. If you are not a Middlebury employee, please skip to step 2) Independent Contractor Worksheet – obtain approval
    2. Supplier Search and Registration
      - a. If supplier (guest speaker) in system, great! Move on to step 3 and provide AP with IC worksheet.
      - b. Supplier (guest speaker) not in system, register supplier. See reference guide “[General Supplier Registration - Section 2.0](#).”
      - c. Upload W-9 in supplier registration
      - d. Upload IC worksheet in supplier registration
    3. Obtain a signed copy of the contract/agreement (ex. Limited Engagement Agreement, Independent Contractor Agreement)
    4. Request purchase order via non-catalog requisition for honorarium. See reference guide “[Non Catalog Requisitions - Section 4.0](#)”
      - Upload the contract/agreement (ex. Limited Engagement Agreement, Independent Contractor Agreement)
    5. Event/engagement takes place
    6. Request invoice payment via [matched invoice](#) for honorarium.
    7. Request reimbursements for travel/food via an [unmatched invoice](#).
- (Answered by Cheryl Foster, GMHEC)*

17. If someone puts in the wrong account information (EDORDA), can I change it for them? Can I change it without sending it back to the end user?

No. Due to the role functionality in Oracle, the end user must correct the account information. For instructions on how to change the account information in a purchase order, please view “[Purchase Orders Miscellaneous - Section 6.0a](#)”. *(Answered by Cheryl Foster, GMHEC)*

18. If you have a new supplier, do you need to put in a supplier registration?

If your supplier is not in Oracle, then yes, you will need to complete the supplier registration form. This is needed in order for the supplier to be paid. Please upload the W-9 when doing so. For instructions on how to register a supplier, please view “[General Supplier Registration - Section 2.0](#)”. *(Answered by Cheryl Foster, GMHEC)*

19. How and when do I do a search for a new vendor?

You would search for a new vendor whenever you are planning to do business with a new supplier. Even though the supplier may be new to you or to your college, there may be a chance that the supplier is already in Oracle since we are sharing suppliers between all four entities. For instructions on how to search for a new vendor, please see procurement reference guide “[General Supplier Registration - Section 2.0](#)”. *(Answered by Cheryl Foster, GMHEC)*

20. Do we have to enter a country code for phone?

You only need to enter a country code for an international supplier. Please leave the country code section blank if your supplier is domestic. *(Answered by Cheryl Foster, GMHEC)*

21. Will current WB Mason shopping lists transfer to Oracle?

No, unfortunately favorites, shopping lists, and order history are unable to be transferred to Oracle due to the technical complexity of a PunchOut system. If you are still able to access your old account, you can take a screenshot or create a PDF of your lists for future reference. *(Answered by Cheryl Foster, GMHEC)*

22. How will multiple approvals work in Oracle?

Should you have multiple charge accounts due to a split transaction, the approval would go to whomever is identified as the budget manager for the department listed in the department code of the EDORDA, or designation if applicable. *(Answered by Cheryl Foster, GMHEC)*

23. How do I return items purchased through a punchout supplier?

Returning an item through a punchout is similar to returning an item with an online supplier. For Amazon, you would click the Amazon link in Oracle. Go to "your orders" and request a return from the website. For all other punchout suppliers, you will contact the customer service lines to request a return.