Quick Guidelines for SEAS processes

IPROCEMENT REQUISITIONS

HCOM (Marketplace) transactions:
- No additional paperwork needed

Non-Catalog requisitions:
1. Attach quote to the requisition
2. If creating a standing PO, specify that in the ‘Notes to approver’
3. The Financial Operations will transmit the PO to the vendor upon approval

Payment Request:
1. Attach invoice to the requisition in Oracle
2. Upon receiving email notification from Oracle (instructions on setting up notifications: see below) write the PR00... number on all invoices, highlight and send to UFS, 1033 Mass Ave 2nd Fl.

Non-Employee Reimbursement:
1. Attach scans of documentation (including signed NERF) to the requisition
2. Upon receiving email notification from Oracle (instructions on setting up notifications: see below) write the NR00... number on the original paperwork, highlight and send to UFS, 1033 Mass Ave 2nd Fl.

TRAVEL AND CARD SERVICES

Web Reimbursement/ Citi Direct Pay:
1. Select the RPM as the approver in web voucher, give the paperwork to the RPM
2. RPM approves and reassigns the requisition to Financial Operations. The original paperwork is sent to Financial Operations via courier
3. Financial Operations will retain an electronic copy and send the original paperwork to Central UFS

BCD Travel Authorization:
1. Submit BCD requisition to Financial Operations
2. Send email with BCD booking information to your Financial Operations contact

Pcard:
1. Independent review of each transaction line needs to be completed by noon on Thursday
2. Original receipts need to be kept by the reviewer with a printout of the week’s sweep (scanned records are allowed)

Vendor Setup (individuals and companies):
1. Submit a vendor request to your SEAS Financial Operations contact
2. Send an email to your SEAS FO with the request ID number and attach the W9. (If you don’t have the W9 please say so in your email and we will obtain a copy from the vendor)

- For foreign individuals: upon the submission of your vendor request, the individual will receive an email with Glacier login information. They will be instructed to print out the generated forms, sign them and send directly to Harvard NRA office via email, fax or regular mail.
- Your vendor request will be approved when Central matches it with the backup documentation (W9 or Glacier)
How to set up email notifications in Oracle

In order to set up your notifications in iProcurement, click on ‘Preferences’ in your iProcurement screen.

Select the type of message you’d like to receive (HTML is the most common selection) and click on ‘Apply’.