

Harvard SEAS HCOM Shoppers Training

Topics covered

- Types of requisitions
- Procure-to-Pay process
- Standing orders
- Returning items
- Cancelling/ changing orders
- Additional forms/ requirements
- Vendor request

Types of requisitions

- **Purchase order:**

The preferred method of shopping at the University.

- ❖ Marketplace purchase

- purchase through the 'Shop' feature in iProcurement

- ❖ Non-catalog purchase

- purchase using the 'Non-catalog order' tab
 - also used to create standing orders

- **Payment Request**

- after-the-fact invoice payment

- **Non-Employee Reimbursement**

Setting your preferences

Accessed by clicking on the Preferences link in iProcurement

- Under 'Notification Mailer Preferences' select type of email you would like to receive when your requisitions are approved or have been modified.
- The email address your notifications are sent to is pulled from Peoplesoft – contact HR or Registrar's office if you need to update it.

The screenshot displays the iProcurement 'General Preferences' page. The left sidebar contains a navigation menu with the following items: Application, iProcurement Preferences, Notification Mailer Preference (highlighted), and Services Bill To Override. The main content area is titled 'General Preferences' and includes a section for 'Delivery Manager e-mail server credentials' with input fields for 'e-Mail username' and 'e-Mail password'. Below this is the 'Notifications' section, which contains a tip: 'TIP Please select Email Style from drop down menu for Requisition Approval Notification.' The 'Email Style' dropdown menu is open, showing the following options: Disabled, Do not send me mail, HTML mail (selected), HTML mail with attachments, HTML summary mail, Plain text mail, Plain text mail with HTML attachments, and Plain text summary mail. The page footer includes a navigation bar with links: Shop, Requisitions, Receiving, Payment Request, and Reporting.

Setting your preferences

The system will allow you to default a number of values, including:

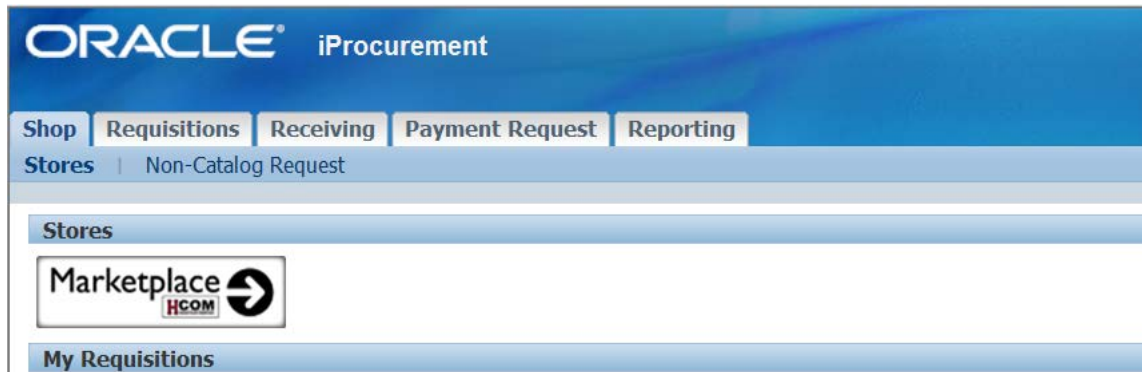
- The preferred number of days between the date an order is placed and the item(s) are delivered
- The name of the person who placed the request
- A default delivery location
- Frequently-used charge accounts (33-digit number lists)

The screenshot shows the 'iProcurement Preferences' web application. At the top, there are navigation tabs: 'hop', 'Requisitions', 'Receiving', 'Payment Request', and 'Reporting'. The 'Receiving' tab is selected. On the left, a sidebar menu shows 'Application' with sub-items: 'iProcurement Preferences' (selected), 'Notification Mailer Preference', and 'Services Bill To Override'. The main content area is titled 'iProcurement Preferences' and includes a note: '* Indicates required field'. Below this, the 'Delivery' section contains several input fields: '* Need By Date Offset' (value: 5), '* Need By Time' (value: 00:00, with an example '(Example: 17:30)'), '* Requester' (value: Curry, Joanna A), and '* Deliver-To Building' (value: NR0013). Each field has a magnifying glass icon for search. Below the 'Delivery' section, there is a checkbox for 'Receiving Required' which is checked. The next section is 'Favorite Charge Accounts', which includes a tip: 'Use the Select column to set your primary favorite charge account. TIP During checkout the system automatically generates charge accounts. In some circumstances, the system may select your primary favorite charge account.' Below the tip, there is a 'Select Account:' label and a 'Set as Primary' button. A table follows with columns 'Select *Nickname' and 'HRVD Accounting Flexfield'. The table lists four charge accounts with radio buttons in the 'Select' column. The first account is selected. At the bottom of the table is an 'Add Another Row' button.

Select	*Nickname	HRVD Accounting Flexfield
<input checked="" type="radio"/>	HR	325.28552.8267.000001.584510.0000.0 TUB.ORG.OBJECT.FUND.ACTIVITY.SUBACTIVITY.ROOT
<input type="radio"/>	Student groups	325.28620.8172.000001.584750.0000.0 TUB.ORG.OBJECT.FUND.ACTIVITY.SUBACTIVITY.ROOT
<input type="radio"/>	facilities (kitchen supplies)	325.28571.6570.000001.585501.0001.0 TUB.ORG.OBJECT.FUND.ACTIVITY.SUBACTIVITY.ROOT
<input type="radio"/>	office supplies	325.28530.6640.000001.584510.0000.0 TUB.ORG.OBJECT.FUND.ACTIVITY.SUBACTIVITY.ROOT

HCOM Marketplace purchase

Accessed by clicking on the HCOM Marketplace button to access over 200 suppliers' catalogs

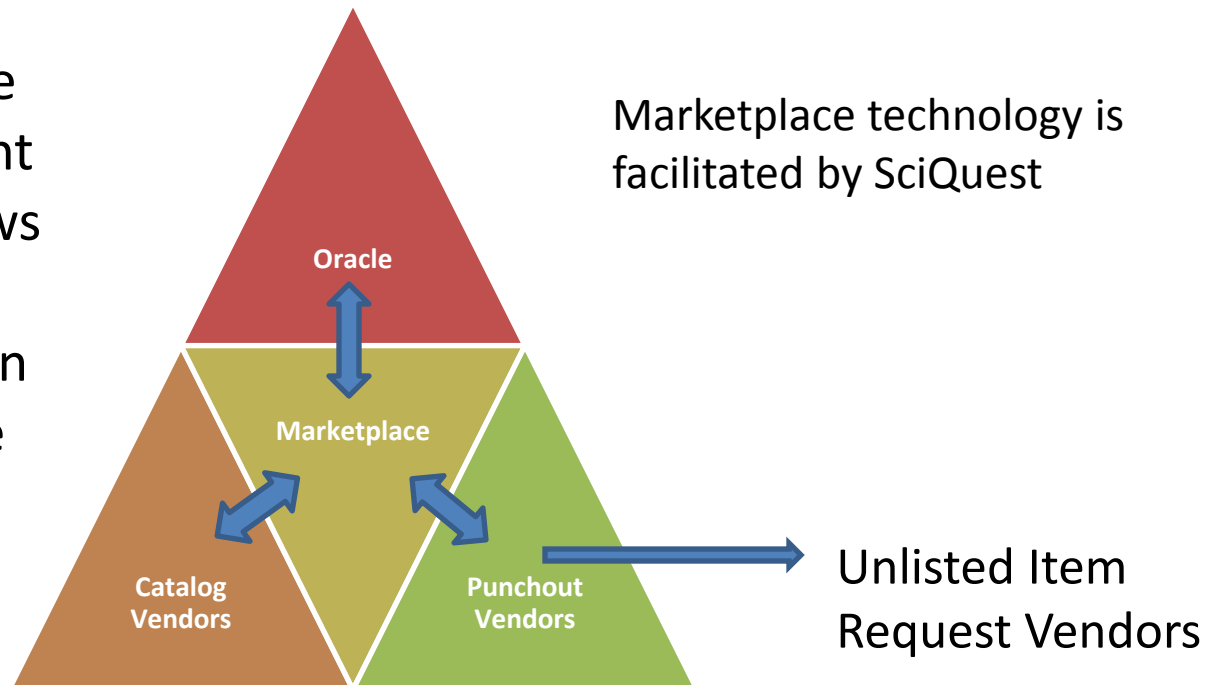


After requisition is complete and the final approval is granted, the order gets sent directly to the vendor.

Note: HCOM orders (PO number starts with 4000...) cannot be changed or cancelled by the shopper in the iProcurement system.

The Marketplace

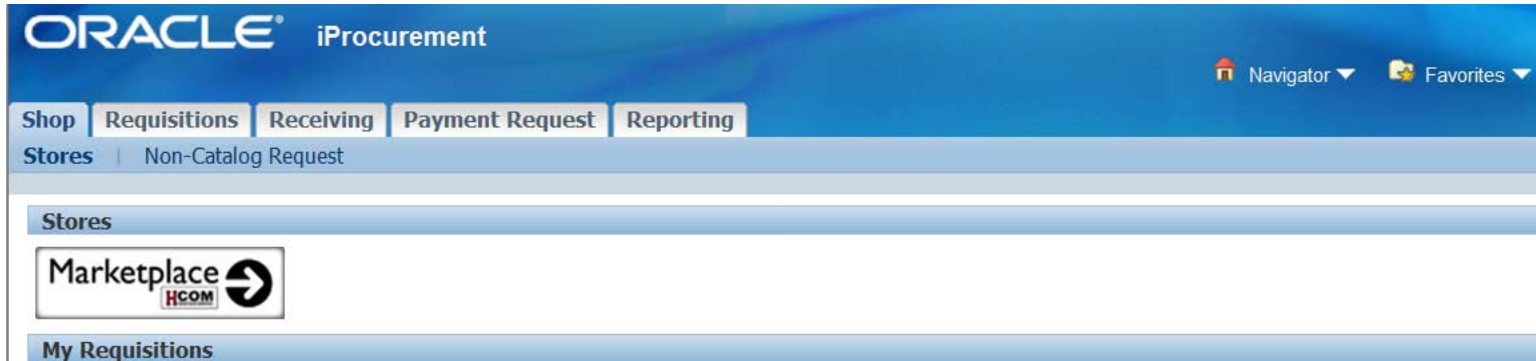
The Marketplace sits between Oracle and the vendors, creating a point of integration that allows purchasers to bring vendor item information back into Oracle for use in creating a Purchase Order



Punchout Requests differ from Catalog Requests only in where the searchable list of commodities is stored. Punchout catalogs are stored externally on the vendor's website; Catalogs are stored internally within the Marketplace.

Non-catalog purchase




Accessed by clicking on the 'Non-catalog' link in the home screen





The purchase information needs to be entered manually.

Non-Catalog Request

* Indicates required field

* Item Type	Goods billed by quantity	
* Item Description	<input type="text"/>	
* Category	NON-CAT.PURCHASE	
* Quantity	<input type="text"/>	
* Unit of Measure	Each	
* Unit Price	<input type="text"/>	
* Currency	USD	

* Supplier Name	<input type="text"/>	
* Site	<input type="text"/>	
Contact Name	<input type="text"/>	
Phone	<input type="text"/>	
Supplier Item	<input type="text"/>	

Clear All

Add to Cart

Clear All

Add to Cart

Non-catalog purchase cont.

In all search fields in Oracle you can use % as a wild card. Search for the Vendor Name as well as the appropriate Vendor Site (verify with the 'Pay to:' section on the quote/invoice)

Each
550
USD

https://finapps-prod.huit.harvard.edu:8000/?_t=fredRC&enc=ISO-8859-1&_minWidth=750&_minHeight=5 - Internet Explorer

Search and Select: Supplier Name

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button. Advanced Search

Search By Supplier Edmund optics Go

Results








Select	Quick Select	Supplier	Site	Address	Contact	Phone	Fax	Email
<input type="radio"/>		EDMUND OPTICS INC	01_PRIMARY	ATTN ACCOUNTS RECEIVABLE 101 EAST GLOUCESTER PIKE BARRINGTON NJ 08007-1380 US				
<input type="radio"/>		EDMUND OPTICS INC	BARRINGTON_02	ANCHOR OPTICAL SURPLUS 101 EAST GLOUCESTER PIKE BARRINGTON NJ 08007-1380 US				

Cancel Select

100%

Non-catalog purchase cont.

Enter the relevant information as shown (this should be readily available to you from a vendor quote, or website), then **Add to Cart** – bottom right of the screen. The Item Description is very important, as changes cannot be made to a non-catalog PO once approved. **The description should include catalog number and description of the item to be purchased.** The revisions to these orders are limited to Need by Date, and Total Price. Once all of the information is added, click **View Cart and Checkout.**

		<input type="button" value="Clear All"/>	<input type="button" value="Add to Cart"/>
* Item Type	Goods billed by quantity 	* Supplier Name	EDMUND OPTICS INC 
* Item Description	FC-SMA Hybrid Adapter (FC-SMA) #90-983 	* Site	01_PRIMARY 
* Category	NON-CAT.PURCHASE 	Contact Name	<input type="text"/>
* Quantity	2	Phone	<input type="text"/>
* Unit of Measure	Each 	Supplier Item	<input type="text"/>
* Unit Price	75		
* Currency	USD 		
		<input type="button" value="Clear All"/>	<input type="button" value="Add to Cart"/>

Non-catalog purchase cont.

When creating an order based on a quote, select 'Goods or services billed by amount' from the dropdown menu under 'Item type'. This will create a PO for the total dollar value of the quote and multiple invoices will be accepted against it.

This option can be used for standing orders as well.

* Item Type

Goods or services billed by amount

* Item Description

Olympus SZX7 Zoom Stereo Microscope system,
quote #123456

* Category

NON-CAT.PURCHASE

* Amount

2000

* Currency

USD

* Supplier Name

EDMUND OPTICS INC

* Site

01_PRIMARY

Contact Name

Phone

Supplier Item

Clear All

Add to Cart

Non-catalog purchase cont.

Please note the screen below:

- Quantity is 2000. Price is 1 USD.
- This is necessary in order to receive a specific invoice amount when billed each month. If the PO is not created in this manner, receipt of an invoice can only be made once and the PO will then be closed by AP.
- If necessary, notify the vendor that the invoice must be sent to you directly.

The balance will diminish as you receive against the PO.

Line	Item Description	Asset Tag Number	Line Level Notes	Unit	Quantity	Price	Amount (USD)
1	Olympus SZX7 Zoom Stereo Microscope system, quote #123456			Each	2000	1 USD	2,000.00
2	FC-SMA Hybrid Adapter (FC-SMA) #90-983			Each	2	75 USD	150.00
Total							2,150.00

Checkout process

- Your deliver-to location must be accurate (list of locations with H-codes attached), in order to avoid loss of product or delays in delivery. The 'Requester' field does not go on the shipping label; make sure to include your name on the 'Attn of Name/Department' line
- You must enter a clear Requisition Description, linking the purchase to a project.
- The Receiving Required for Payment box must be checked. Once your product is delivered to you, please electronically receive in the system (receiving info to follow).

The screenshot displays a web-based form for the checkout process, divided into two main sections: Requisition Information and Billing.

Requisition Information:

- Navigation:** A top bar contains tabs for "Living", "Payment Request", and "Reporting". Below this, a progress bar shows three steps: "Requisition Information" (active), "Approvals", and "Review And Submit".
- Buttons:** "Cancel" and "Save" buttons are located on the right side of the form.
- Requisition Description:** A text field contains "Microscope and fiberoptics purchase for XYZ project, dr. Frankenstein".
- Form Fields:**
 - ☒ Receiving Required for Payment
 - * Need-By Date: 30-May-2017 00:00:00 (with a calendar icon)
 - (example: 25-May-2017 19:45:00)
 - * Requester: Curry, Joanna A (with a search icon)
 - * Attn of Name/Department: Joanna Curry/ SEAS Procurement
 - * Attn of Room/Floor: 20 University Rd SEAS 6th Fl
 - ☐ Set Attn Lines as Default
 - * Deliver-To Building: NR0013 (with a search icon)

Billing:

- Charge Account:** 325.28530.6640.000001.584510.0000.00000
- Bill To Attn of Name/Department:** (empty text field)
- Bill To Attn of Room/Floor:** (empty text field)
- Bill To:** (empty text field with a search icon)
- ☒ Use Central Administration Bill To Address

Checkout process cont.

- The Charge Account section must be accurate. This automatically populates with the default account that was assigned to you upon being granted iProcurement access. Please ensure that the correct object code is listed, and change the account if needed. To change the costing string, click on the link, change the code to the one that matches your purchase, click apply. Click next to move forward with submission of the requisition.
- Standing orders have an option to have the invoice sent somewhere other than the default Central AP mailing address. You can uncheck the box and provide your address in the fields provided.

Checkout process cont.

- To add an attachment (quote, invoice, additional documentation), you must first save the attachment to a file. Hover over the Add Attachment link, select File from the drop down. Add a title. Select the file to attach. Remember to SAVE before proceeding!
- You may also add a note to the supplier in the box to the right. Please notify vendors (and your approvers) directly if there are specific mailing/delivery instructions. A handful of vendors do not receive the notes.
- For Linde and Airgas orders, the account number assigned to your lab or location, must be included in this space, along with other notes.

Approvals

No Approvals Required

Manage Approvals

Notes

Note to Approver

Note To Supplier

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Vendor Justification / Debarment Certification Section

Vendor	Vendor Site	*Justification Reason	Justification Explanation	*Pricing Review Code	Pricing Other Explanation	Debarment Certification (DC)
No results found.						

[download a copy of the Debarment form](#)

Checkout process cont.

- In some instances you may need to modify your default approval hierarchy.
- You may 'Add an approver' if necessary, by clicking the radio button and adding the preferred approver's name (Last, First), and clicking the flashlight to search.
- If you need to route your requisition through a different approval structure (ie. different Harvard school, etc.) select the 'Change First Approver' option and select the appropriate replacement for your default approver.
- Vendor Justification Form section is required for federally sponsored purchases over \$5,000. Attach backup documentation as attachment upon filling the section out.
- Once this step is complete, click submit to return to your previous page.

Placing orders with the vendor

- HCOM orders are transmitted to the vendors automatically.
- Non-catalog vendors have to be sent to the vendor; otherwise the order doesn't get placed.
- Upon receiving a notification that your requisition has been approved, copy the PO number from the email (starts with 700...)
- In the 'Requisitions' tab click on 'Search' and paste the 7000... number

Shop

Requisitions

Receiving

Payment Request

Reporting

Requisitions

Notifications

Approvals

Requisitions

Search

Views

Indicates requisition with a pending change request.

Select requisition:

Copy To Cart

Change

Complete

Previous

1-10

Next 10

Select	Requisition	Supplier	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	6959861	MILLENNIUM PRINTING CORPORATION	testing attachments	50.00	25-May-2017 14:00:58	Approved	70002191497
<input type="radio"/>	6900669	EDMUND OPTICS INC	Microscope and fiberoptics purchase for XYZ project, dr. Frankenstein Lab	2,150.00	06-Apr-2017 13:09:23	Approved	70002191463
<input type="radio"/>	6895139	W B MASON COMPANY INC	office supplies for 20 University Rd	120.30	03-Apr-2017 10:17:26	Approved	40002130412
<input type="radio"/>	6880414	HOTLINE TECHNOLOGIES INC	Hotline Technologies Innovation Challenge award 2016	1,500.00	21-Mar-2017 12:16:20	Approved	PR002117627
<input type="radio"/>	6877560	STEPHINE ERWIN	Stephen Erwin Inv.: 001 Dated: 2/14/17 Consulting planning	880.00	17-Mar-2017 14:53:25	Approved	PR002114916
<input type="radio"/>	6870185	AGILITY ROBOTICS INC	Cassie 1.1 Bipedal Robot, Agility Robotics Cassie Series, Kuindersma-Agility Robotics - 3/6/17	250,000.00	10-Mar-2017 12:24:11	Approved	70002108388
<input type="radio"/>	6819150	FLAGSHIP PRESS INC	Joanna Curry business cards	25.00	25-Jan-2017 15:48:18	Approved	40002095277
<input type="radio"/>	6814472	MILLENNIUM PRINTING CORPORATION	testing attachments	50.00	23-Jan-2017 09:58:49	Approved	70002058961
<input type="radio"/>	6812981	MILLENNIUM PRINTING CORPORATION	test requisition	0.00	20-Jan-2017 09:27:19	Cancelled	70002057556
<input type="radio"/>	6796451	VERICORE LLC	MTI settlement - Vericore 5406617	1,186.00	05-Jan-2017 15:54:05	Approved	PR002043032

Select requisition:

Copy To Cart

Change

Complete

Previous

1-10

Next 10

Checkout process cont.

- Open the PDF file (to the right of the requisition) and email to the vendor.
- The email is usually provided in the quote; if not – look for a sales email on the company's website.

Shop Requisitions Receiving Payment Request Reporting

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Requisitions Search

Enter search criteria and press the Go button to find the requisitions.

Requisition Created By

Requisition Created Any Time ▼

Requisition Number

Order Number

Requester

Requisition Status All Statuses ▼

Requisition Description

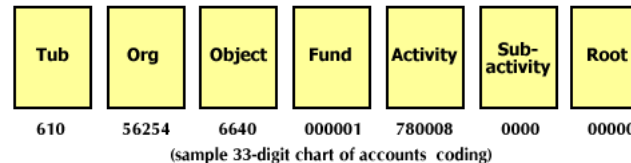
Supplier

Select	Requisition	Supplier	Description	Total (USD)	Creation Date ▼	Status	Order	PO
<input type="radio"/>	6900669	EDMUND OPTICS INC	Microscope and fiberoptics purchase for XYZ project, dr. Frankenstein Lab	2,150.00	06-Apr-2017 13:09:23	Approved	70002191463	PDF

Common object codes

Common object codes	When to use
6600	Lab supplies
6640	Office supplies – cannot be charged to government accounts
6660	Computer supplies – up to \$500 per item, if larger use object code 6750
6710	Computer software
6811	Fabrication – Non-sponsored >= \$5000
6812	Fabrication – Sponsored >= \$5000
6813	Equipment – Non-sponsored >= \$5000
6814	Equipment – Sponsored >= \$5000
6750	Computer hardware – between \$500-\$4999 per item
6770	Rental of equipment
8050	Book binding
8091	Repair of computer hardware
8140	General repairs, non-computer repairs and maintenance fees
8230	Rental of uniforms – or purchase and laundry service of uniforms
8360	License fees
8540	Photocopying + duplicating
8570	Copyright fee/ royalty fee
8700	Postage

*Sponsored fund range: 100000-299999



Receiving orders

- Electronic receipt is required for the invoice to get paid
- If all the goods you ordered are delivered, receive all the goods ('Express receive')
- If only a portion of the goods are delivered, receive only what was delivered
- If all the goods are delivered and you need to return one or more items, receive all the items and process the return

Shop Requisitions Receiving Payment Request Reporting

Receiving | Work Confirmations

Search Items to Receive Search Attribute Find by Order Number Search Value Go

Receiving

Select the receiving action you want to perform.


- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted.

Full List



✓TIP ** in front of Order Number denotes receiving required for payment

Requisition	Requisition Description	Supplier	Order Number	Express Receive
5161117	Coffee services for 20 University Rd	ATLANTIC COFFEE AND PROVISION LTD	**70000690851	
5142710	Harvard SEAS Shred Day 4/5/13 inv#45527	DATASHREDDER CORPORATION	PR000687055	

My Receipts at a Glance

Click **View Details** to view receipt details.

Full List

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
534156	Notebook/LCD Privacy Monitor Filter for 21.3 Notebook/LCD Monitor	23-Apr-2013	23-Apr-2013	W B MASON COMPANY INC	
534155	3M 22" Widescreen Privacy Filter	23-Apr-2013	23-Apr-2013	GOVCONNECTION INC	

Returning orders

- Order first has to be received in iProcurement
- Reasons for return include:
 - overshipped,
 - damaged,
 - quality,
 - incorrect goods
- Obtain RMA # from vendor (if needed, contact Financial Operations Office for assistance)
- Complete return in iProcurement
- Ship item back

Completing a return in HCOM

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Navigator Favorites Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving Payment Request Reporting

Receiving Work Confirmations

Search Items to Receive Search Attribute Find by Order Number Search Value Go

Receiving
Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

Requisitions to Receive
Click **Express Receive** to directly create receipts with the receipt values automatically defaulted.
TIP ** in front of Order Number denotes receiving required for payment
[Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
5164731	Procurement supplies	GOVCONNECTION INC	**40000693713	
5163475	Procurement supplies	W B MASON COMPANY INC	**40000692555	

Receiving Process

- Receive**
Record receipt of the items you ordered, or receive on behalf of others.
[Receive Items](#)
- Return**
Need to send items back to the supplier?
[Return Items](#)
- Correct**
Did you record the wrong receipt quantity?
[Correct Receipts](#)

Shop Requisitions Receiving Payment Request Reporting

Receiving Work Confirmations

Find Receipt Return Information Review and Submit

Return Items: Find Receipt

Receipt Created By Curry, Joanna A

☐ Include people from all organizations

Items Received Last 7 Days

Receipt

Requisition Number

Order Number

Supplier

Go Clear

Cancel Clear Changes Step 1 of 3 Next

Receipt	Requisition	Description	Return Quantity Unit	Quantity Received Supplier	Order Number
529967	5161117	Coffee services for 20 University Rd	Each	250.9 ATLANTIC COFFEE AND PROVISION LTD	70000690851
531038	5161117	Coffee services for 20 University Rd	Each	165.25 ATLANTIC COFFEE AND PROVISION LTD	70000690851
531662	5163475	Hot Cups, Paper, 16 oz., Coffee Dreams Design, 50/Pack	Each	1 W B MASON COMPANY INC	40000692555
531662	5163475	Notebook/LCD Privacy Monitor Filter for 21.3 Notebook/LCD Monitor	Each	W B MASON COMPANY INC	40000692555
531662	5163475	Stainless Steel Office Ruler With Non Slip Cork Base, 12"	Each	2 W B MASON COMPANY INC	40000692555

Indicates an adjusted receipt quantity

TIP Use the Previous/Next navigation tool to make selections across multiple pages

Cancel Clear Changes Step 1 of 3 Next

Completing a return in HCOM

The screenshot shows the 'Return Information' form in the HCOM system. At the top, there is a navigation bar with tabs for 'Shop', 'Requisitions', 'Receiving', 'Payment Request', and 'Reporting'. Below this, a sub-navigation bar shows 'Receiving' and 'Work Confirmations'. The main form area has a progress indicator with three steps: 'Find Receipt', 'Return Information' (the current step), and 'Review and Submit'. The 'Return Information' section includes a 'Return Items: Enter Return Information' label, a 'Reason' dropdown menu, a 'Return Material Authorization' dropdown menu, and a 'Comments' text area. A 'Search for Reason' button is located next to the 'Return Material Authorization' dropdown. On the right side of the form, there are 'Cancel', 'Back', and 'Next' buttons, with 'Step 2 of 3' displayed between 'Back' and 'Next'. At the bottom of the page, there is a footer bar with links for 'Shop', 'Requisitions', 'Receiving', 'Payment Request', 'Reporting', 'Shopping Cart', 'Home', 'Logout', 'Preferences', and 'Help'. The copyright notice 'Copyright (c) 2006, Oracle. All rights reserved.' is visible in the bottom right corner.

Shipping

In order to ship a package via Fedex please fill out the Fedex airbill and bring the package to the Loading Dock in the LISE Building or 52 Oxford Street. There are carts available in the loading dock area as well as some packing materials. If help is needed with larger packages, please contact:

§ 9 Oxford Street (for LISE, McKay, Pierce, Maxwell Dworkin, Cruft buildings)

Please contact Allison Galipeau: tel: 617-496-4489 email: agalipeau@fas.harvard.edu

§ 52 Oxford Street (for Northwest, ESL 58 Oxford St and 60 Oxford St. buildings)

Please contact Alfred Trainor: tel: 617-496-5432 email: ajtrain@fas.harvard.edu

Holds resolution

- Email notification from noreply-apollo26@harvard.edu
- **Receiving Hold:** vendor bills for items, but the items haven't been formally received in HCOM.
 - To resolve:** complete receipt in HCOM or contact Financial Operations if items haven't arrived
- **Price Hold:** vendor bills for items \$9.99 over the price of line item (shipping excluded)
 - To resolve:** Use the 'change requisition' feature to increase the price of the line item or contact Financial Operations
- **Quantity Hold:** vendor bills for additional units of an item exceeding the PO quantity
 - To resolve:** Use the 'change requisition' feature to increase the quantity or contact Financial Operations if the overbilling is an error.

Changing and cancelling purchase orders

- Only Non-catalog POs (7000...) can be changed/cancelled
- Only the original shopper can change/cancel orders
- Changes allowed are: quantity, amount, need-by date. All changed requisitions increasing the dollar amount will be re-routed through the approval flow.
- Cancellation requests and price decreases do not require approval.
- If the order has already been placed with the vendor, please notify them about the cancellation
- Account code distribution field cannot be changed. In case you used incorrect account coding, please contact your approver.
- Requisitions that contain Marketplace line items cannot be changed using this feature. In order to cancel a Marketplace PO (number beginning with 40000*****, please email your Financial Operations contact

Changing/ cancelling a requisition

ORACLE iProcurement

Navigator Favorites Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving Payment Request Reporting

Requisitions Notifications Approvals

Requisitions

Search

Views

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Change Complete Previous 1-10 Next 10

Select	Requisition	Supplier	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	5072710	MILLENNIUM MAINTENANCE	yfhghf	54.00	04-Feb-2013 14:20:39	Incomplete	
<input checked="" type="radio"/>	5072707	MILLENNIUM PRINTING CORPORATION	test requisition	40.00	04-Feb-2013 14:19:19	Approved	70000619792
<input type="radio"/>	5072664	Multiple	testing NR multiple	188.00	04-Feb-2013 14:10:09	Incomplete	
<input type="radio"/>	5072657	Multiple	testing NR multiple	0.00	04-Feb-2013 14:07:36	Cancelled	Multiple

ORACLE iProcurement

Navigator Favorites Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving Payment Request Reporting

Requisitions Notifications Approvals

Enter Changes View Approvals Review And Submit

Change Order 5072707 (40.00 USD): Select Lines

For lines with multiple distributions, click on the Quantity link to change quantities or click on the Amount link to change amount.

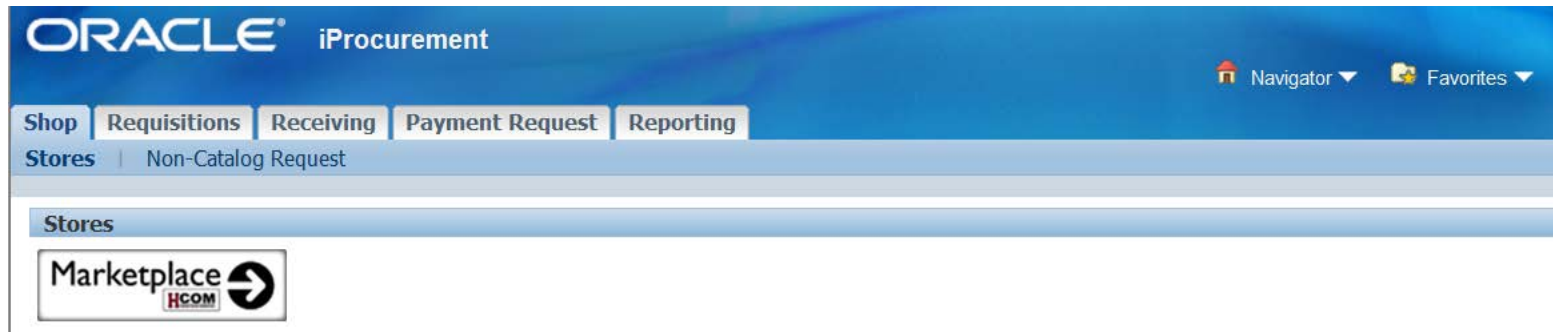
Cancel Step 1 of 3 Next

Line	Description	Order Type	Order	*Need-By	Unit	*Quantity	Price	Amount (USD)	Cancel Line	Reason
1	business cards	Purchase	70000619792	12-Feb-2013	Each	40	1 USD	40.00	<input type="checkbox"/>	requisition created in error

TIP Note that not all lines may be eligible for changes.

Payment Request

Accessed by clicking on 'Payment Request' tab



Examples of use:

- when you cannot submit a pre-commitment requisition (ex. when the vendor does not accept purchase orders or you're paying for a service/order that has already been completed)
- Payments to individuals (performers, lecturers, awards, fellowships, honorariums, etc.)
- Administrative payments if a standing order cannot be used (royalties, membership, refunds)

Payment Request cont.

- Follow similar process as non-catalog order:
 - Provide adequate description and reference invoice or order
 - Attach an electronic copy of the invoice
- When the requisition is approved and the requestor receives an email notification with the PR number (PR00...) write the PR number on the paper copy of the invoice and send it to Central AP (1033 Mass Ave, 2nd Fl). There is a courier pick up box in the Pierce Hall mailroom.

Standing orders

- Standing Orders are used to create a purchase order for recurring goods/services (e.g.sub-contracts, temp services, equipment maintenance services, dry ice e.t.c).
- A standing purchase order can accommodate multiple invoices over an extended period of time with the convenience of preapproval and no individual approvals are required for invoices.
- Things to remember:
 - Standing Order should be created for the current fiscal year or length of project.
 - Standing Order should be created using Service Contract or Quote from the supplier as the source.
 - Goods or Services Billed by Amount or Services Billed by Quantity item type should be used for Standing Order for Services.
 - Invoices should reference the Purchase Order number.
 - Invoices should reference the appropriate Purchase Order lines to be charged.

New vendor/ vendor site request



Information required to complete a new vendor request:

- Vendor's W9 form
- Complete vendor name
- Vendor type
- Tax ID number
- Permanent address
- Remit to address
- Select your Financial Operations contact as your vendor request approver
- Notify your approver via email about a pending vendor request

Submitting a new vendor request

Vendor Information

* Vendor Name

Vendor Name max length = 50

* Vendor Type

[Address Standards](#)

Remit Address

* Address Line1

Address Line2

Address Line3

* City

The city name will be used to derive the site name

State

Postal Code

example (i.e. 02138-1619)

Country



Canadian Province

[Postal Code Lookup](#)

Phone

Format 123-123-1234

Fax

Format 123-123-1234

Permanent Legal Address ***

*** Permanent Legal Address will be used for Tax Reporting purposes

☐ Same as Remit Address

* Address Line1

Address Line2

Address Line3

* City

The city name will be used to derive the site name

State

Postal Code

example (i.e. 02138-1619)

Country



Canadian Province

[Postal Code Lookup](#)

Phone

Format 123-123-1234

Fax

Format 123-123-1234

Notes to CRT

Approver Information

* Tub



* Org



* Approver Name



Submit

SEAS Building location codes

Location ID	SEAS Location	Street Address
H03761	58 Oxford St	40 Oxford St (ESL)
H06225	60 Oxford St	60 Oxford St (Wyss)
H04131	Conant	12 Oxford St
H04132	Converst	12 Oxford St
H03760	Cruft Lab	19 Oxford St
H04145	Hoffman Lab	20 Oxford St
H03763	Jefferson Lab	17 Oxford St
H03763	LISE Bldg	15 Oxford St
H04133	Mallinckrodt	12 Oxford St
H03762	Maxwell Dworkin	33 Oxford St
H86073	McKay Lab	9 Oxford St – All deliveries except Gases and WB Mason
H03764	Pierce Hall	29 Oxford St
X04555	Rowland Institute	100 Edwin Land Blvd (02142)
H04221	Lyman	13 Oxford St
H04435		7 Divinity
H05532	Wyss	107 Ave Louis Pasteur
S00032	Northwest Bldg B1	52 Oxford St
NR0013	20 University Rd	20 University Rd
S00045	Karp Research Labs	Children's Hospital-1 Blackfan Circle
H86069	LISE	11 Oxford Street
H86084	WYSS CLSB	3 Blackfan Circle
H02740		HSPH 665 Huntington Ave. Bldg 1. Room G33
S00085		100 Bigelow Street
H86079		NW Labs Receiving Area
H04151		Harvard Forest

Useful links/ contact information

- **SEAS Financial Operations Team:**

procurementhelp@seas.harvard.edu

Donesia Cummings: 617-495-4461; cummings@seas.harvard.edu

Hera Daldalian: 617-495-4429; hera@seas.harvard.edu

Noemis Ortiz: 617-496-3625; nortiz@seas.harvard.edu

Joanna Curry: 617-496-6970; jcurry@seas.harvard.edu

- **SEAS Financial Operations website:**

www.seas.harvard.edu/financial-operations

- **Strategic Procurement website:**

www.procurement.harvard.edu

- **Shipping and Receiving :**

9 Oxford Street (for LISE, McKay, Pierce, Maxwell Dworkin, Cruft buildings)

Please contact Allison Galipeau: tel: 617-496-4489 email: agalipeau@fas.harvard.edu

§ 52 Oxford Street (for Northwest, ESL 58 Oxford St and 60 Oxford St. buildings)

Please contact Alfred Trainor: tel: 617-496-5432 email: ajtrain@fas.harvard.edu