2018 ORACLE PURCHASE ORDER RENEWAL PROCESS

As we approach the end of fiscal year 2018, it is time to start the renewal of Blanket Purchase Orders and Service/Maintenance Agreements that are scheduled to expire on or around June 30, 2018.

RENEWAL PROCESS FOR FY19

All renewal requisitions must be submitted through Oracle as NEW requisitions. Renewal requisitions and POs created prior to 7/1/2018 will still have the R18 or P18 prefix. Renewal requisitions and purchase orders created after 7/1/2018 will have R19 or P19 prefixes.

IDENTIFYING LEGACY ORDERS FOR RENEWAL

To identify Blanket Purchase Orders and Service/Maintenance Agreements that potentially require renewing, the Financial Unit Manager should log into Oracle and run the Departmental Playbook P2P Purchasing Summary report.

Prompts: Set the Accounting Period to Dec 17 to identify the legacy POs that were converted to Oracle and select your Financial Unit. You may also sort or filter by status.

Report Results: The P2P Summary Report will list all eProcurement POs that converted to Oracle along with the dollar balances at the time of conversion (12/19/2017). This report does not provide the order type such as Blanket or Service/Maintenance, so if you can't identify the order type from the report, you may look up the PO in eProcurement to confirm if it is a Blanket or Service/Maintenance order. Once you have confirmed which of your converted POs qualify for renewal, follow the specific order type instructions below.

DUPLICATING ORACLE REQUISITIONS

Oracle provides a duplicating function to allow you to "clone" or duplicate a requisition. If you have several identical or near identical orders to renew, you can create one new requisition and then, before submitting it for approval, duplicate it using the Actions -> Duplicate function. After duplicating the requisition, you can edit specific details such as price, delivery location or quantity as required.
BLANKET PURCHASE ORDER RENEWALS FOR FY19

Important Changes for FY19

Use of Blanket Orders

Oracle’s expanded menu of requisition Smart Form types and Aquiire’s superior eCommerce functionality provide the means to replace many blanket orders with more appropriate Smart Form orders or individual Aquiire transactions. Going forward, the use of blanket orders will be reduced in favor of these alternative ordering methods.

Three-Way Matching

New and renewal blanket orders will be configured for 3-way match receiving to further enhance departmental oversight and payment control over these transactions. There will be limited exceptions to the use of the Receiving feature for Blanket orders – these include gas cylinder rentals, utilities and telephone/cable services.

To create your FY19 requisition:

1. **Needs Assessment:** Perform an assessment to determine if the blanket order can be eliminated or replaced by transactional Aquiire orders or alternative Smart Form. Requests to renew blanket orders with minimal spend volume will be rejected or returned for further justification. If you confirm that you still require a blanket PO with the supplier, please include an explanation in the requisition Justification field.

2. In Oracle, select the Smart Form type “Blanket Order”.

3. Complete the requisition following the standard Oracle process. Be sure to include the Current/Expiring PO number in the Additional Information section.

4. **IMPORTANT:** For FY19 requisitions submitted prior to 7/1/2018, for Billing, set the Budget Date to 7/1/2018. For requisitions submitted after 7/1/2018, use the default Budget Date.

5. Note to Supplier field, include this statement – “Use this purchase order only for orders after 7/1/2018”

6. Verify that all appropriate data fields have been completed and that the appropriate documents are attached. **NOTE:** Incomplete requisitions will be rejected back for correction.

Requisitions for Blanket purchase orders are typically processed and released 15 days prior to their effective start date.
SERVICE/MAINTENANCE AGREEMENT RENEWALS

To create your FY19 requisition:

1. Confirm that your department still owns the equipment and that a service agreement is still required or desired.
2. Obtain the new service agreement from your supplier.
3. In Oracle, select the Smart Form type “Service/Maintenance”.
4. Complete the requisition following the standard Oracle process. Be sure to include the Current/Expiring PO number in the Additional Information section.
5. IMPORTANT: For requisitions submitted prior to 7/1/2018, for Billing, set the Budget Date to 7/1/2018. For requisitions submitted after 7/1/2018, use the default Budget Date.
6. Note to Supplier field, include this statement – “Use this purchase order only for orders after 7/1/2018”
7. Attach the unsigned supplier contract agreement to the requisition.
8. Verify that all appropriate data fields have been completed and that the appropriate documents are attached. NOTE: Incomplete requisitions will be rejected back for correction.

Requisitions for Service/Maintenance orders are typically processed and released up to 45 days prior to their effective start date.

SUPPORT

If you have any questions regarding the purchase order renewal process you may:

1. email your questions to Purchasequestion@vanderbilt.edu
2. call Purchasing at 615-322-2911x4
3. call the primary purchasing agent assigned to the products or services commodities to be ordered. The list of agents and their assignments is available at https://finance.vanderbilt.edu/purchasingservices/about/contact.php