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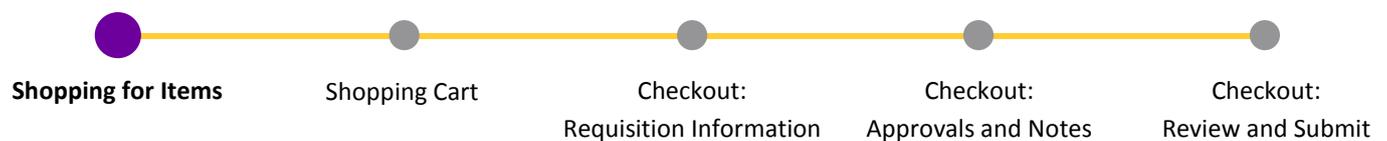
My Purchasing Options

iProc Requisitioner | Oracle Financials

This guide is intended for iProc Requisitioners who want to check and/or amend their default settings in the *My Purchasing Options* tab in the iProcurement (iProc) part of the Oracle Financials system.

The requisition process:

Shopping for Items — Shopping Cart — Checkout: Requisition Information — Checkout: Approvals and Notes — Checkout: Review and Submit

What is My Purchasing Options?

Your user account will have certain defaults assigned to it; these are based on your request for access in the Oracle system. The *My Purchasing Options* feature allows you to check and amend the default settings on your user account.

You should check these defaults before raising your first requisition as changing the defaults makes requisition raising quicker for you.

How can I view My Purchasing Options?

1. Login to Oracle Financials via this link: http://financelive.fin.manchester.ac.uk/

2. Click the **PO Internet Procurement MP (UOM)** responsibility to open iProc.

3. Click the **My Purchasing Options** tab. Your current settings will be displayed.

How can I make changes in the Purchasing section (Purchasing Unit and Purchasing School)?

The *Purchasing* section shows the *Purchasing Unit* and *School Code* which your purchasing documents will be assigned to.

To change these fields you will need to:

1. Click into the **My Purchasing Unit** field or the **Purchasing School** field. The steps below apply to both of the fields.

2. Enter a search eg 3 letter school code, or the first letter only eg first letter of the Faculty code.

    In Oracle Financials, the wildcard is **%** and this helps with your searches. To see all values within a particular Faculty, enter the Faculty letter followed by the wildcard eg *E%.*

    Alternatively, you can search by keyword eg *%chemistry%.* Using the wildcard at the front and end of the keyword means that you are looking for wherever that keyword appears in the description, whereas using % before the keyword searches for anything where the keyword is the last word, and

using % after a keyword means the search will look for options where the keyword is at the front of the description.

3. Press the **Tab key** or use the **magnifying glass** icon to search. The matching *Purchasing Units/Purchasing Schools* will be displayed.

4. Find and select your purchasing unit or school. Use the **Next** and **Previous** options to move through the results if the option you want does not appear on the first page.

5. Use the **Quick Select** icon to select your purchasing unit or school. This will now be updated in the relevant field.

6. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.

7. Select the **Shop** tab to raise a requisition with the updated purchasing options.

How can I make changes in the Personal section (Deliver To Location and Phone Number)?

The *Personal* section shows the *Deliver To Location* which your purchasing documents will be assigned to. This is a mandatory field, so make sure you enter your location here.

Also shown is the system held *Phone Number* for you. This may be shown on purchasing documentation sent to suppliers.

To change your **Deliver To Location** you will need to:

1. Click into the **My Deliver To Location** field and enter a search for your location eg the first letter of the location.

    In Oracle Financials, the wildcard is **%** and this helps with your searches. To see all values that begin with a particular letter, enter the letter followed by the wildcard eg *E%* for *Estates*.

    Alternatively, you can change the **Search By** menu to **Description** and search by keyword eg *%stores%*. Using the wildcard at the front and end of the keyword means that you are looking for wherever that keyword appears in the description, whereas using % before the keyword searches for anything where the keyword is the last word, and using % after a keyword means the search will look for options where the keyword is at the front of the description.

2. Press the **Tab key** or use the **magnifying glass** icon to search. The matching locations will be displayed.

3. Find and select your *Deliver To Location*. Use the **Next** and **Previous** options to move through the results if the option you want does not appear on the first page.

4. Use the **Quick Select** icon to select your location. This will now be updated in the relevant field.

5. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.

6. Select the **Shop** tab to raise a requisition with the updated purchasing options.

To change your **Phone Number** you will need to:

1. Click into the **My Phone Number** field and type in your phone number. This may be shown on purchasing documentation sent to suppliers.

2. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.

3. Select the **Shop** tab to raise a requisition with the updated purchasing options.

How can I change My Favorite Charge Account?

The *Favorite Charge Account* section shows the **default Activity code** used when raising requisitions. This is initially set to *WH00187*.

If you always raise requisitions to a particular Activity code, you should set this as your *Favorite Charge Account.* Once set, all requisitions you raise will default to this code, which will save you time!

This feature does not work for Project codes (a code beginning with R or P).

To change your *Favorite Charge Account* you will need to:

1. Click into the **Activity** field and enter the Activity code you wish to set as your default code when raising requisitions. Press the **Tab key** or use the **magnifying glass** icon to search. If a search window opens at this point, find and select the correct Activity code using the **Quick Select** icon.

2. The Activity code you have selected as your *Favorite Charge Account* is now shown. Check this is correct.

3. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.

4. Select the **Shop** tab to raise a requisition with the updated purchasing options.

Next step: Raise a requisition with these new settings in place.