**My Purchasing Options 12.2**

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.

***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: <https://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.

1. Press the **Tab key** or use the **magnifying glass** icon to search. The matching *Purchasing Units/Purchasing Schools* will be displayed.
2. 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.
3. Use the **Quick Select** icon to select your purchasing unit or school. This will now be updated in the relevant field.
4. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.
5. 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.

1. Press the **Tab key** or use the **magnifying glass** icon to search. The matching locations will be displayed.
2. 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.
3. Use the **Quick Select** icon to select your location. This will now be updated in the relevant field.
4. Click **Apply** to save these changes on your account. A message will be displayed to show that the purchasing options have been saved.
5. 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 Favourite Charge Account?***

The *Favourite 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 *Favourite 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 *Favourite 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 *Favourite 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.