Oracle (ERP) Purchasing Requisition and Purchase Order Approval Policy

Oracle has been configured to align with the Williamson County Purchasing Policy.

Role Definitions and Responsibilities

Requisition Requestors: Requestors shall be authorized by Department Head, Elected Official or their designee to create purchase requisitions in Oracle.
Limit shall be $0.01.

Requisition Approvers: Approvers shall be authorized by Department Head, Elected Official or their designee to approve purchase requisitions in Oracle.
Limit shall be $19,999.99.

Purchase Order Creator/Approver (Oracle Buyer): Approvers are authorized by the Purchasing Agent/Deputy Purchasing Agent to create and approve purchase orders after a requisition is routed through required approvals.

Purchasing Module Permission Verification: Purchasing Agent/Deputy Purchasing Agent are authorized by the Commissioners Court to verify Oracle Purchasing Module System user permissions ServiceNow requests and forward to Oracle System Administrators.

Subsequent Oracle Hierarchy Approvers: Subsequent Oracle Hierarchy Approvers shall be authorized by the Commissioners Court to approve purchases of $20,000 and over and special funds purchases (i.e. technology funds, court reporter funds, projects/grants etc.). These hierarchy approvers include Purchasing Buyer Pass-Through Queue, Budget Officer, Chief of Staff and County Judge.

Purchase Order Viewer: Viewers shall be authorized by Department Head, Elected Official or their designee to view Purchase Orders in Oracle.

Oracle Purchasing System Administrators: Administrators shall be authorized by the Chief Information Officer to set up and maintain the Oracle Purchasing Module System permissions and roles. Oracle System Administrators shall provide Department Heads and Elected Officials a permissions report once per year.

Funding Source Assignment: Funding Sources are created and assigned by the Auditor's Office. As new codes are created and assigned the Auditor's Office is responsible for notifying the Department Head or Elected Official.

Department Head and Elected Officials: Department Heads and Elected Officials shall be responsible for authorizing and maintaining purchasing permissions, role assignments, GL codes and special funds on their departmental spreadsheet report.

ServiceNow Managers: ServiceNow Managers are designated by Department Heads or Elected Officials to enter employee asset requests through ServiceNow. ServiceNow Managers shall be responsible for new requests, change requests and termination requests for Oracle Purchasing Module System permissions.

Oracle Purchasing Module System Configuration

Pass-through: The Oracle Purchasing Module requires a value of $0.01 to be assigned to a role with no approval authority. This functionally is referred to as "pass-through".

Report To Field: The Oracle Purchasing Module defines the purchasing requisition approval routing path as "Report To Field" in the system.

Requisition Requestors: Requisition Requestors shall be assigned a pass-through limit of $0.01 in order to generate a requisition.1

Requisition Approvers: Requisition Approvers shall be assigned an approval limit of $19,999.99 but some exceptions apply, in order to approve a requisition. Requisitions under $20,000 will be approved by the Department Approver and route to the Purchasing Buyer's requisition queue (Oracle Auto Create file).

In some cases, departments have more than one level of department approver. The highest department level approver whose limit shall not exceed $19.999.00 shall report to the Senior Contract Specialist in the Oracle configuration. The Senior Contract Specialist queue (Purchasing Buyer Pass-Through queue) is the first level in the Subsequent Oracle Hierarchy Approvers workflow.

Funding Sources (GL Codes): All Funding Sources (GL Codes) include General Fund, Special Funds, Project Funds and Grant Funds as determined by the Auditor's Office. Usually, a range is entered to allow future codes to be included.

Funding sources are assigned and sent to a department by the Auditor's Office and shall be established in the baseline configuration.

Funding Source Exception: Special Funds, Project Funds and Grant Funds requisitions shall route through the Subsequent Oracle Hierarchy Approvers and shall require Requisition Requestors and Requisition Approvers authorized with Oracle Purchasing Module System permissions to be assigned an approval limit of $0.01 (no approval authority) to assure correct routing.

Baseline: A baseline configuration shall be established in the fall of 2023 and each year thereafter for each Department Head or Elected Official to document all up to date Oracle Purchasing Module System permissions through ServiceNow. This baseline utilizes a spreadsheet report generated by Oracle that reflects the Oracle Purchasing roles and permissions.

ServiceNow Software Asset Request

A spreadsheet report reflecting department roles and funding sources will be generated by the Information Systems Department and placed in the department's SharePoint file once per year. This report reflects the roles and permissions in Oracle.

New Oracle permissions or changes to existing permissions for employees shall be requested through the ServiceNow Software Asset Request Form by Department Heads, Elected Officials and or ServiceNow Managers. Each authorized Oracle Purchasing user will require a ServiceNow ticket for subsequent updates.

The request requires that the complete department spreadsheet of roles and funding sources be included with edits and signed by the Department Heads, Elected Officials, or ServiceNow Mangers.

The Purchasing Department will review the request and verify that correct role assignments have been documented. Once the Purchasing Department approves the Asset Request through ServiceNow, the Information Systems Department shall implement and configure Oracle Purchasing Module System permissions to reflect that approved request.

Purchasing staff will check against the Williamson County Purchasing Hierarchy Report for staffing updates on a weekly basis. When the purchasing staff notices a title change, promotion, or termination they will make every effort to remind the Department Heads, Elected Officials or authorized ServiceNow Mangers that heir Oracle Purchasing Module System permissions may need to be updated.

Department Training

Department Heads, Elected Officials and ServiceNow Managers, Requisition Requestors, Requisition Approvers, and subsequent Approvers are not permitted Oracle Purchasing access until they have completed required training through the Purchasing Department.