

NOTE: A location is the site that the department will have the goods shipped (Ship To) to or the bill sent to (Bill To) by the company the purchase document is allocated to.

1. General:

This form should be completed when a Department needs to Add, Change or Inactive a Location for the processing of purchase documents in the Purchasing or Inventory Module.

2. Action Required:

Check the appropriate block for action required.

3. Inventory Organization:

For Inventory Module only. Enter the organization name that the new location will be linked to.

4. Address Style:

For Inventory Module only. Not required unless other than Canada.

5. Tax Name:

For Inventory Module only. Tax type (GST, HST, No Tax)

6. Location Name:

Indicate Location name when changing or inactivating an existing location. Location name for new locations will be assigned by Treasury Board. Eg EXC001

7. Location Description:

Location description is what the department will see when selecting the location from the List of Values in the Oracle Financial system. Dept identifier (Eg. FIN) and Division or Section should be included in description.

8. Location Type:

Click the appropriate blocks to indicate the type of location. (Eg, Bill To and Ship To or just Ship To)

9. Department Name

Enter the name of the department that the Location is associated to. Eg Executive Council

10. Location Address:

First line of address should be the department name. Second and third lines should include division name, and address. When setting up for ship to location, the full address should be completed not a PO Box number.

11. Department Approved By:

This field would be dated and approved by the proper authority (Manager/Director or equivalent of the Financial Administration Division) in the department.

12. Operational Management & Strategic Planning Division Use Only:

Not to be completed by Department.

Actioned on and By to be signed by the Security Group in OMSP Division, Dept of Finance

Approved on and By to be signed by the Manager of the OMSP Division, Dept of Finance