iProcurement

Training Manual

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Oracle 11i - iProcurement Course

Student Guide
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  - Solution – Checking the status of Requisitions
  - Practice – Searching for specific Requisitions
  - Solution – Searching for specific Requisitions
  - Practice – Finding more information about a Requisition
  - Solution – Finding more information about a Requisition
- Agenda
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### Oracle 11i - iProcurement: Receiving

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Effective 5 December 2005
Revision V 1.0

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Oracle 11i Implementation Project

Chapter 1
Oracle 11i Implementation Project
Why are we re-implementing Oracle?

- Current Oracle system is not supported
- Chart of Accounts has been re-implemented
- Chance to implement new functionality
- Interfaces being re-written

Interfaces are the transfer of data from one system i.e. Callista to another system i.e. Oracle, which happens automatically. This allows the Oracle system to be used as the core financial system for the University.
New Functionality in 11i

- **Payables** – Redesigned Invoice entry screen, XML invoices and payments, email remittance advice
- **Cash Management** – new module for bank reconciliations
- **Fixed Assets** – iAssets, Asset maintenance, transfer Assets by category, Rollback/Recreate journal entries
- **Receivables** – Improved User Interface, Invoice preview and reprint, XML invoices, Credit Management
- **General Ledger** – XML Publisher, eJournals, Enhanced Drilldown & T Accounts, Automatic Journal Reversal, Web based account inquiries
You will be attending this Oracle 11i training session to enhance your understanding of the new finance system.

The above diagram shows the prerequisite training you will be attending, plus non-mandatory training sessions that we recommend.
Oracle 11i - Abbreviations

Chapter 2
Some common abbreviations used in this course:-

- (M) = Menu
- (B) = Button
- (Help) = Oracle Online Help Screens
- (N) = Navigator
- (I) = Icon
- (T) = Tab
- LOV = List of Values
- (H) = Hyperlink

Common Abbreviations

During this training session and future training sessions you will be enrolled in you will come across some standard menu path abbreviations that are used through the Oracle 11i documentation.
Objectives

After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through iProcurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through iProcurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
Purchasing Policy

- Purchase orders are the main method of procuring goods and services for the University and should be used for most purchases.
- Corporate credit cards should be used for all travel expenditure and for low value purchases (generally below $1,000) with a one-off Vendor where it would be uneconomical to use a purchase order.
- More detailed information on the methods of procurement can be found in the Procurement Procedures Manual on the Strategic Procurement web page.

After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through /Procurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
Key Areas of Responsibility

- Strategic Procurement
- Approvers
- iProcurement Users
- Shared Services
- Risk Management and Audit Assurance

Strategic Procurement
- Establishment of Preferred Vendor Agreements.
- Authorising the establishment of new Vendors.
- Approving Purchase Orders.

Approvers
- Approving/rejecting requisitions.

iProcurement Users
- Creating purchase requisitions where appropriate.
- Receiving items that have been ordered.

Shared Services
- Entering invoices.

Risk Management and Audit Assurance
- Accounting for matched purchase orders
After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through i/Procurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
Purchasing Hierarchy Overview

There are two different hierarchies used for approving purchase requests. The Requisition Approval Hierarchy is used whenever an iProcurement user in a Faculty/Centre creates and submits a Requisition using the iProcurement module. After the Requisition goes through this hierarchy and is approved, the Strategic Procurement team creates a Purchase Order from the Requisition and then the Purchase Order document travels through the Purchase Order Approval Hierarchy.

Requisition Approval Hierarchy

The Requisition Approval Hierarchy places each iProcurement user into a hierarchical position, based upon their role at the University. The Requisition Approval Hierarchy looks similar to what an organisational chart of the University may look like.

Each member of the hierarchy is assigned certain document approval rights, including the dollar value that they are allowed to sign-off on. When a new Requisition is created, an approval list is built based upon the Requisition Preparers' place in the hierarchy, as well as the dollar amount of the Requisition. The approval list will include the approver who has authority to approve the dollar amount and accounting flexfield referenced on the Requisition.

Based the sample hierarchy outlined in Figure A, if Worker A were to submit a Requisition in the amount of $25,000, the approval list generated by the system would include Manager A.
Since Manager A can approve documents up to $50,000, the Requisition would not need to travel to the VP for approval.

This system of document routing and approvals helps the University in several ways. It allows for greater control over University purchases, particularly those at very high dollar amounts. This allows for tighter financial control, which in-turn will lead to greater financial efficiency as well as increased managerial accountability. A system of hierarchical approvals works well in an organisation the size of ECU, where it is often very difficult to account for who is spending the money and where it is going.

**Purchase Order Approval Hierarchy**

After a Purchase Requisition is approved by the final approver, it moves on to the Strategic Procurement team where a Purchase Order is created. The Purchase Order must then go through the Purchase Order Approval Hierarchy.

**The Timeout Feature**

The hierarchy concept is dependent upon user interaction with the system to approve or reject purchasing documents.

So what happens when a user is not approving documents that are waiting for their approval? There is a timeout feature associated with each approval hierarchy with a schedule established to determine how long a document will wait for approval before issuing a reminder notification. This feature keeps documents moving if an approver is not approving documents in a timely fashion, or if an approver has gone on vacation without forwarding their approval notifications to another user.

Currently, the original Requisition approval notification will timeout after 1 day and then send a reminder notification email advising the approver that the document still needs to be approved. The system then gives the approver 2 more days to respond before issuing the final notification. If no response is received in 2 more days, the document is returned to the originator with a status of incomplete, and they will have to resubmit the document.

For example, using Figure A above, if Worker A submits a Purchase Requisition for $25,000 the approval list that is generated to approve the requisition would include Manager A. If Manager A does not perform any action with the document after 1 days, they will be sent a reminder notification advising them that the document is waiting for their approval. They then have 2 more days to approve the document until it times out. Should the document reach the final timeout on Manager A, the document would not move on to the VP because they were not in the original approval list. When the document times out it is then returned to the Requisition Preparer, Worker A.
After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through /Procurement
- Identify who is responsible for performing functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
Request a New Vendor

**Note:** All fields marked with a * are mandatory and require a value before the form can be submitted.

2. Enter your name in the Requested By field.
3. Enter your email address in the E-mail field.
4. Enter your phone number in the Phone field.
5. Select your Faculty / Centre from the pulldown list on the Faculty / Centre field.
6. Enter your School / Branch in the School / Branch field.

**Reason why a new vendor is required**

7. Select the reason why you need a new vendor added to the database in the Reason for New Vendor field.
8. If the reason you need a new vendor is not listed, type in the reason in the Other field.
New Vendor Details
9. Enter the Vendor’s Name in the Vendor Name field.
10. Select the Vendor Type from the pulldown list in the Vendor Type field.
11. Enter the Vendor’s email address in the Vendor Email field.
12. Enter the Address to send vendor payments (cheques) to in the Pay Address fields.
13. If the same address is to be used to send vendor purchase orders to, check the checkbox in the Copy? Field.
14. Alternatively, enter a different address to send vendor purchase orders to in the Purchasing Address fields.
15. Select the UNSPSC Segment code from the pulldown list in the UNSPSC Segment field.
16. Select the UNSPSC Family code from the pulldown list in the UNSPSC Family field.
   Note: The actual code will be displayed in a field to the right of the UNSPSC Family field.
17. Enter the vendor’s phone number (including area code) in the Phone Number fields.
18. Enter the vendor’s fax number (including area code) in the Fax Number fields.
19. Enter the vendor’s ABN number in the ABN fields (format is 99 999 999 999).

Vendor Bank Details
20. Enter the vendor’s bank account name in the Account Name field.
21. Enter the name of the vendor’s bank in the Bank Name field.
22. Enter the vendor’s BSB (format 999-999) in the BSB field.
23. Enter the name of the vendor’s bank branch in the Bank Branch field.
24. If the vendor is an international vendor complete the International Vendor Bank Details section.

International Vendor Bank Details
25. Enter the vendor’s bank address line 1 in the Address 1 field.
26. Enter the vendor’s bank address line 2 in the Address 2 field.
27. Enter the city that the vendor’s bank is in, in the City field.
28. Enter the state that the vendor’s bank is in, in the State field.
29. Enter the zipcode that the vendor’s bank is in, in the Zip field.
30. Enter the country that the vendor’s bank is in, in the Country field.
31. If you only intend to use this vendor just this once, please check the box to indicate this.
32. If you have any additional comments that will assist the setting up of this new vendor then please make then in the Additional Comments field.
33. If you are satisfied that you have provided as much information as possible and that information is accurate, please click the Submit button, or click the Clear button to clear your data entry.
34.
   Note: If the Supplier you are requesting is not going to be used very often, use the Additional Comments field to request that the Supplier Type ‘Annual Supplier’ be assigned. This way the Supplier won’t be deactivated due to lack of activity.
After completing this module you should be able to do the following:

- Understand how the Purchasing Policy affects purchases made through iProcurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
Request a Purchasing Account

Note: All fields marked with a * are mandatory and require a value before the form can be submitted.

2. Enter the name of the account holder in the Name field.
3. Enter the account holder’s phone number in the Phone field.
4. Enter the account holder’s email address in the Email field.
5. Select the Faculty / Centre that the account holder belongs to in the Faculty / Centre field.
6. Enter the School / Branch that the account holder belongs to in the School / Branch field.
7. Enter the account holder’s position (i.e. job title) in the Position field.
8. Enter the person that the account holder reports to (i.e. who will need to approve their requisitions) in the Report to Whom field.
9. Enter the Approval limit that the account holder is allowed in the Approval Limit field (if you are unsure refer to the Financial Delegations Manual).
10. Select the Delivery Location Campus from the pulldown list.
11. Enter the Building and Room Numbers that the account holder will want the majority of their purchases delivered to in the Delivery Location Building and Delivery Location Room fields.

12. Enter the charge account you want the system to default when you enter a requisition in the Default Flexfield fields (this is only a default and can be overridden at point of entry).

13. Enter the Cost Centres and Projects that are within the account holders approval.

14. Indicate if this account application is for anew position at the University, or if the account holder is replacing someone who has left an existing position.

15. If the account holder is replacing someone who has left an existing position, please advise the name of that person.

16. Please indicate if the person the account holder is replacing has left the University.

17. If the person who is being replace has not left the University, please advise which Faculty / Centre (or School / Branch) they have moved to.

18. Read the disclaimer and indicate your agreement and understanding of it by clicking the Submit button, or click the Clear button to clear your data entry.
You should now be able to do the following:

- Understand how the Purchasing Policy affects purchases made through iProcurement
- Identify who is responsible for perform functions within the purchasing process
- Describe how the purchasing hierarchy affects the approval process
- Request a New Vendor
- Request a Purchasing Account
iProcurement Overview
Objectives

After completing this module you should be able to do the following:

- Understand how Oracle iProcurement fits in with the other modules
- Identify and explain the key functionality of Oracle iProcurement
- Describe the flow of data in the Oracle iProcurement process
• Understand Oracle iProcurement components in the procure to pay process
• Identify key functionality of Oracle iProcurement
• Discuss key data flows in Oracle iProcurement
Oracle iProcurement Integration

Oracle Payables
- Accounting for matched purchase orders
- Suppliers
- Purchase orders

Oracle Purchasing
- Contract purchase agreements
- Document controls and defaults
- Employees (requestors and buyers)
- Organisations (receiving)
- Locations
- Hierarchies (approval)

Oracle General Ledger
- Sets of books
- Exchange rates
- Accounting flexfield
- Currency
• Charge account combinations

**Oracle Workflow**

• Account Generator
• Approval process
• Automatic document creation
• Notifications

**Oracle Projects (this module is being evaluated and may be implemented in the future)**

• Project and task tracking
• Expenditure type and expenditure organisation
Agenda

- Understand iProcurement components in the procure to pay process
- **Identify key functionality of Oracle iProcurement**
- Discuss key data flows in Oracle iProcurement
Key Functionality of Oracle iProcurement

**Shopping**
Process where users search for, compare, and select items that they need to purchase. Users can search the internal catalog, lists, table of contents, and categories. This allows users to punch out (go to another supplier site) to either supplier-hosted or marketplace-hosted catalogs to shop. Once found, the items can be quickly added to a shopping cart.

**Checkout and submit**
Requestors enter quantities, billing information, and delivery information in the shopping cart for their order. Their cart contents are converted to a requisition and submitted for approval.

**Approval and order creation**
The system moves requisitions (this process is called workflow) to the correct approvers based on predefined business rules. Approved requisitions are used to create purchase orders and blanket purchase agreement releases.

**Receive order**
Process where users specify information about the delivery of their order.
Shopping

Shopping describes the process of finding the correct items for your order and adding them to your shopping cart.

My Favorites

If requestors order the same items regularly they can develop a Favorites List by selecting an item from the search results and clicking the Add to Favorites button. **Note:** Item information in the Favorites List is not updated when the original item is updated in the Oracle /Procurement internal catalog.

Public List

Public lists are requisition templates that are created in Oracle Purchasing and then extracted into /Procurement. An example of a public list is an office supplies list. The list could contain the standard set of office supplies a new employee would need.

Search

Requestors can search for item names, item numbers, supplier names, and other criteria available in the internal catalog.

Browse Categories

Oracle /Procurement catalog management enables the catalog administrator to create a table of contents by item category. For example, you may want to order a pencil. By using the Browse
Category feature you would first select Office Supplies and then Pencils to see the selections available.

**Non-Catalog**

There may be occasions when an item is not listed in either the internal catalog or in a supplier-hosted or marketplace-hosted catalog. You can order an item that is not listed in your catalog by using the Create Non-Catalog Request page. Non-Catalog items can include services or specialty items.

**External Catalog (Punchout)**

Users may punchout to a supplier-hosted Web site to search for items and bring them back into Oracle iProcurement to be used on a requisition.
Overview of Checkout

Use the checkout process to complete necessary requisition information, copy items from your shopping cart to a requisition, and submit the requisition for approval.

- Step-by-step checkout takes the most steps to complete.
- Express checkout takes the fewest steps to complete.

**Step-by-step checkout**

The most detailed checkout method. This process leads the user through the entire checkout process one step at a time. Step-by-step checkout helps the user understand and correctly enter all the relevant information required on a requisition.

**Power checkout**

Designed for super users, it provides the most flexibility and complete control over the entry of data. The user can enter or change any information for one or all items on the requisition with minimum clicks.

**Express checkout**

The fastest method of the three. Delivery and billing information defaults from the user’s profile.
Approval and Document Creation

After the requisition is submitted, it passes through the Requisition Approval workflow to pass the business rules set up.

**AutoCreate**

Manual Oracle Purchasing process where approved requisitions do not reference a contract purchase order set up in the system.

**Create Documents Workflow**

Using a source document, this workflow automatically creates a purchase document from an approved requisition. If the source is a contract purchase agreement, then a purchase order release is created.
Overview of Receiving

The approved order is then transmitted to the supplier, the supplier ships the items, and the requestor then acknowledges receipt of the items.

Order Transmission
The approved order is transmitted to the supplier by mail or facsimile, e-mail, electronic data interchange (EDI), or extensible markup language (XML) as set up for the supplier in Oracle Purchasing.

Shipment Notification
The order is shipped and the supplier provides notification.

Receipt Confirmation
The requestor confirms receipt of the order, performs corrections of receipts, or does returns at desktop using Oracle iProcurement. A receipt can be created at time of receipting or by response to a confirm receipt notification.
• Understand iProcurement components in the procure to pay process
• Identify key functionality of Oracle iProcurement
• Discuss key data flows in Oracle iProcurement
Oracle iProcurement Submit Order Data Flow

The shopping cart contents become requisition lines during checkout and are submitted for approval.

Purchasing
The iProcurement requisition becomes part of the requisition pool awaiting action by workflow or AutoCreate.

Workflow
- PO Requisition Approval workflow routes the requisition for approval.
- PO Create Documents workflow creates a purchase order or release from the approved requisition.
- PO Approval workflow routes the purchase order for approval.
Summary

You should now be able to do the following:

- Understand how Oracle iProcurement fits in the procure to pay process
- Identify and explain key functionality of Oracle iProcurement
- Describe the flow of data in the Oracle iProcurement process
Oracle 11i - iProcurement:
Getting Started and
Housekeeping
Chapter 5
Objectives

After completing this module you should be able to do the following:

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
Agenda

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
Finding things on the iProcurement Homepage

1. **Stores**: this is where you can link to any external catalogs that have been set up (i.e. Corporate Express Australia) and any non-catalog request templates that have been set up for your convenience.

2. **My Requisitions**: this is a list of the last five (5) requisitions that you have raised. From here you can quickly identify the status of those requisitions, copy them to create new requisitions, and/or receive item orders. If you want to see more requisitions that you have received, click the Full List button.

3. **My Notifications**: this is a list of the last five (5) notifications that you have received (and not responded to). If you want to see more notifications that you have received, click the Full List button.

4. **Purchasing News**: this is where you can check the Frequently Asked Questions and the Purchasing Policies pages. If there is any system news it will also be displayed here.

5. **Shopping Cart**: if your shopping cart contains any items they will be displayed in this section. This is a new feature for ECU and should reduce the number of duplicate items ordered.

6. **Search**: from this area you can select a store to search and enter search criteria. For a more complex search, click the Advanced Search link.
7. **Help**: clicking this link will open up the Help menu from where you can access the Oracle Standard Help file relating to iProcurement.

8. **Preferences**: clicking this link will open up the Preferences menu, where you can change General preferences or iProcurement specific preferences.

9. **Home**: clicking this link will take you out of iProcurement and back to the Main Navigation page.

10. **Logout**: clicking this link will log you out of the Oracle Financials Applications.
Agenda

- Find things on the iProcurement Homepage
- **Check and respond to your notifications**
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
Notifications - Viewing

You will receive an FYI Notification from the system when a requisition you have raised has been actioned. The notification will either advise that the requisition has been approved or rejected.

If the requisition has been approved it will go on to be created into a purchase order that will be communicated to the supplier.

If the requisition has been rejected the requisition will show a status of REJECTED (under the My Requisitions heading), you are then able to change the requisition or add justification notes and then resubmit it.

Note: If you are an approver you will also see notifications that require your action. These notifications can be actioned from within iProcurement.

Note: Requisitions can have an approval status of Approved, Incomplete, In Process, Pre-Approved, Rejected, or Returned.
Notifications - Responding

You open a notification by clicking on the subject line of the notification you want to view. Once the notification is open you can view who actioned it and when, by looking at the Approval Sequence.

If your requisition was rejected you will see a link to resubmit the requisition (alternatively, this can be done from the iProcurement homepage).

If the approver has put any comments (i.e., the reason they rejected your requisition, or requesting more information) you will see this in the Notes column of the Approval Sequence table.

Once you have reviewed the notification, click the OK button to close the workflow and remove the notification from your Notifications Worklist.

Note: If you need to review this notification again, click the Full List button on the iProcurement homepage, and select All Notifications from the View pulldown list before clicking the Go button. This will bring back a list of all requisitions you have received.
Notifications – Granting Worklist Access

1. (N) Procurement Homepage > My Notifications.
2. (B) Full List.
4. (B) Grant Worklist Access.
5. Enter or Select the name of the Employee / User you want to grant access to.
6. Optionally add a description for your own information.
7. Select the date that you want to start granting access from.
8. Optionally enter the date you want to stop granting access.
9. (B) Apply.

Note: By granting access to your worklist you are allowing that person to respond to notifications on your behalf. This means that notifications appear that they have been approved by you, so please use this with caution and only grant access to people who can be trusted.
Practice - Granting Worklist Access

Overview

In this practice, you will do the following:

- Grant access to your worklist to the person sitting to your left.
- Access the worklist of the person sitting to your right.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

1. Grant your worklist access to the person sitting to your left.
2. Access the worklist of the person sitting to your right.
Solution – Granting Worklist Access

Log on to the System

− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Grant your worklist access to the person sitting to your left

1. Navigate to the iProcurement homepage and click the Full List button in the My Notifications section
   - (N) iProcurement homepage > My Notifications
   - (B) Full List

2. Open the Worklist Access page.
   - (H) Worklist Access
   
   **Note:** you can review the list of people who currently have access to your worklist on this page.

3. Grant Worklist Access to the person sitting on your left.
   - (B) Grant Worklist Access
   - Name = the username or employee name of the person sitting to your left
     
     **Note:** if you are not sure what their username is please ask them.
   - Description = (optional) enter a description detailing why you have granted access 
   - Start Date = use today’s date
   - End Date = use tomorrow’s date
     
     **Note:** by specifying an end date you are granting access to your workflow to that person for only the dates specified. If you leave the end date blank you are granting access indefinitely.
   - (B) Apply

4. Review your Worklist Access:
   
   **Note:** you should now see one entry listed in your Worklist Access table showing the information you just entered.

5. Return to the iProcurement Homepage.
   - (H) Shop: Stores
Access the worklist of the person sitting to your right

7. Navigate to the iProcurement homepage and click the Full List button in the My Notifications section
   - (N) iProcurement homepage > My Notifications
   - (B) Full List

8. Switch User
   - (B) Switch User
   - Select the User you want to switch to
   - (B) Apply

9. You should now be looking at the notifications for the person sitting to your right.
   **Note:** you can confirm this by looking at the top left of screen where it identifies: “Worklist for <username>”.

10. Repeat steps 7 and 8 and select your own username to switch back to your own notification list.
Notifications – Reassigning

1. (N) iProcurement Homepage > My Notifications.
2. (H) Vacation Rules.
3. (B) Create Rule.
4. Select the Item Type (i.e. the Name of the Notification you want to create the rule for).
   
   **Note:** By selecting the Item Type in Step 5 you can elect to create one rule for ALL your notifications, or separate rules for each type of notification you receive.
   
   If you selected “--All--” GOTO Step 9, else continue.
5. (B) Next.
6. Select Notification (i.e. the specific Notification message you want to create the rule for).
7. (B) Next.
8. Enter the Start Date you want to create this rule for (including the time in 24 hour format).
9. Optionally enter the date you want this rule to stop.
10. Optionally enter a Message to be shown the person who will be receiving your notifications.
11. Reassign your notification to a specific Employee / User.
12. Select the either delegate your response or transfer the ownership of the notification.
Delegate your response - Select this option if you want to give the new user authority to respond to the notification on your behalf, but you want to retain ownership of the notification yourself. For example, a manager might delegate all vacation scheduling approvals to an assistant.

Transfer notification ownership - Select this option if you want to give the new user complete ownership of and responsibility for the notification. For example, use this option if you should not have received the notification and you want to send it to the correct recipient or to another recipient for resolution. A transfer may have the effect of changing the approval hierarchy for the notification. For example, a manager might transfer a notification about a certain project to another manager who now owns that project.

14. (B) Apply.
Practice - Reassigning Notifications

Overview

In this practice, you will do the following:

- Reassign your requisition notifications to the person sitting to your left.
- Revoke the reassignment.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Reassign your requisition notifications to the person sitting to your left

Revoke the reassignment
Solution – Reassigning Notifications

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Reassign your requisition notifications to the person sitting to your left

1. Navigate to the iProcurement homepage and open the Vacation Rules page.
   - (N) iProcurement homepage > My Notifications.
   - (H) Vacation Rules.

2. Create a new vacation rule.
   - (B) Create Rule.
   - Item Type = Requisition.
   - (B) Next.
   - Notification = --All--.
   - (B) Next.
   - Start Date = accept the default of the current date and time.
   - End Date = use the calendar to select tomorrow’s date.
   - Note: by specifying an end date you are delegating your notifications to that person for only the dates specified. If you leave the end date blank you are delegating your notifications indefinitely.
   - Message = type in a message to the person who will be receiving your notifications.

3. Reassign the notification to the person on your left.
   - All Employees and Users = <username of person to your left>
   - Select “Delegate your response”
   - (B) Apply.

4. Review your Vacation Rules:
   - Note: you should now see one entry listed in your Vacation Rules table showing the information you just entered.

5. Return to the iProcurement Homepage.
• (H) Shop: Stores

**Revoke the reassignment**

6. Navigate to the iProcurement homepage and open the Vacation Rules page.
   - (N) iProcurement homepage > My Notifications.
   - (H) Vacation Rules.

7. Find the Rule you want to delete and click the trashcan icon in the Delete column of the row you want to delete
   - (I) trashcan (Delete column).

8. You are shown a warning message asking you to confirm that you want to delete the Vacation Rule.
   - (B) Yes.

9. Return back to the iProcurement homepage.
   - (H) Shop: Stores.
**Agenda**

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- **Access the Help menu**
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
The iProcurement help menu provides access to the Oracle Standard Help Files specific to iProcurement.

Under the Additional Help menu you will find ECU Specific contact information. Time permitting, this help file may evolve into ECU specific help in the future.
Agenda

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
You can control how you interact with Oracle Self-Service Web Applications by specifying user preferences on the Preferences page. None of the fields on this page are mandatory, but the ones that may be of most interest are:-

- **Change Password > Known As**: change the name that displays in the Welcome banner when you sign on to Oracle Self-Service Web Applications.
- **Start Page > Responsibility**: select a responsibility in this field and that responsibility will automatically load every time you log in to Oracle.
- **Start Page > Page**: include a specific page to load every time you log in to Oracle.
  
  **Note:** If you have your responsibility as “Internet Procurement (ECU): and your page as “PO SSP HOME” the iProcurement homepage will load every time you log in to Oracle.

- **Notifications > Email Style**: select the type of email notification you want to receive from the system.
  - **Disabled**: do not use this functionality.
  - **Do not send me mail**: do not send the notifications as e-mail. You can only view the notifications and take action from the Notifications Worklist page.
- HTML mail: send notifications as HTML e-mail. You must read your mail in an HTML e-mail viewer.
- HTML mail with attachments: send notifications as HTML e-mail including HTML attachments.
- HTML summary mail: send a summary of all notifications as HTML e-mail. You must use the Notifications Worklist page to take action on individual notifications.
- Plain text mail: send notifications as plain text e-mail.
- Plain text mail with HTML attachments: send notifications as plain text e-mail but include the HTML-formatted version of the notifications as attachments.
- Plain text summary mail: send a summary of all notifications as plain text e-mail. You must use the Notifications Worklist page to take action on individual notifications.

- When you have made the changes required click the Apply button.
  
  **Note:** if at any point you want to back out the changes you have made and return the system defaults click the “Reset to Default” button.
Agenda

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- **Access the iProcurement Preferences menu**
- Use Search and Select to find field values
Preferences are used to automatically fill in specific information on various checkout pages. Preferences expedite shopping and save time.

To use these preferences, make your selections and then click Apply. Some changes may not take effect until your next login.

**Note:** Any field marked with a blue asterisk is mandatory and will require a value before you are allowed to apply your changes.

**Note:** Most of the field values will default from the system setup, but you can modify them on a personal level from this screen.
Charge accounts are the General Ledger accounts to which a purchase will be charged. Normally, a purchase is charged to the account associated with your employee record. If you commonly order things which should be charged to other accounts you can set them up in this section and give them an easy to remember nickname. You can also select the account that you want to use by default during checkout.

To create a Favourite Charge Account:-
1. Type in a nickname that will identify the charge account during the Checkout process.
2. Enter the Accounting Flexfield (Project.Cost Centre.Account.Activity.Location.Company) that should be defaulted when the Nickname is used during the Checkout process.
   If this is the first charge account you are setting up:-
3. Select the row (by clicking the radio button in the Select column) and click the “Set as Primary” button.
   Note: You can only define one favourite charge account as the primary, but by repeating Step 3, you can change the primary to another row.
Practice - Creating a Favourite Charge Account

Overview

In this practice, you will do the following:

- Create a Favourite Charge Account and set it as Primary.
- Create another Favourite Charge Account.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

1. Create a Favourite Charge Account and set it as Primary.
2. Create another Favourite Charge Account.
Solution – Creating a Favourite Charge Account

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a Favourite Charge Account and set it as Primary

1. Navigate to the iProcurement homepage and open the iProcurement Preferences page.
   - (N) iProcurement homepage > (H) Preferences.
   - (H) iProcurement Preferences.

2. Create a favorite charge account.
   - (B) Add Another Row.
   - Nickname = Media Materials.
   - ECU Accounting Flexfield = 68000.2430.4000.SA.06.01.
   - Select the row you just entered by clicking the radio button in the Select column.
   - (B) Set as Primary.

Create another Favourite Charge Account

3. Navigate to the iProcurement homepage and open the iProcurement Preferences page.
   - (N) iProcurement homepage > (H) Preferences.
   - (H) iProcurement Preferences.

4. Create a favorite charge account.
   - (B) Add Another Row.
   - Nickname = Domestic Airfares.
   - ECU Accounting Flexfield = 68000.2430.3000.SA.06.01.
   - Select the row you just entered by clicking the radio button in the Select column.
   - (B) Set as Primary.

The favourite charge accounts you have just created will be used later during the non-catalog request exercises.
Agenda

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
Using Search and Select to find field values

1. Click the Flashlight icon to the right of the field where you need to search for values.
2. Enter information in the Search By field that will help reduce the list of possible choices (e.g. "furn" if you are searching for furniture items).
   
   **Note:** Use the "%" symbol as a wildcard. If you are searching for something specific but you only know part of the information, you can use the "%" symbol to take the place of the part that you do not know. For example, if you know you are looking for Cornell [something] Extension, try putting "corn%ext" in the Find field. This will return anything that has "corn" in the beginning and "ext" anywhere after it.
3. (B) Go.
4. Click the icon in the Quick Select column on the row that shows you value you want to use.
   
   **Note:** Using Quick Select automatically takes the value you have selected and populates the field you originated the search from with it. Alternatively, you can click the radio button in the Select column on the row that shows the value that you want to use, but then you have to click the Select button.
   
   **Note:** After selecting an item you should be returned to the form that you were on before you began the search. The new value that you chose should be input in the proper field.
You should now be able to do the following:

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Access the Help menu
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
Oracle 11i - iProcurement: Raising Requisitions

Chapter 6
iProcurement
Raising Requisitions
Objectives

After completing this module you should be able to do the following:

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Raising a Requisition using an External Catalog

To order stationery from the Corporate Express external catalogue (i.e. the punchout):-
1. Navigate to the iProcurement Homepage.
2. Corporate Express – Stationery Store.
   - **Note:** By doing this, you are leaving the ECU iProcurement website and navigating to the Corporate Express netXpress website.
   - **Note:** You may have to authenticate to access the Corporate Express website, the same as you would to visit any webpage external to ECU.

If you know the product code you want to order:-
3. Enter the product code in the Code field.
4. Enter the quantity you want to order in the Unit Qty field.
5. (B) Add to Order.

If you know the product code you want to order:-
6. Type in search criteria in the Product Search field.
7. (B) Go.
8. Enter the quantity of each item that you want to purchase in the Unit Qty field.
9. (B) Add to Order.
   
   **Note:** You can click on the Product Code to display more information about the product.
   
   **Note:** If you try to order an item that does not have a price attached to it, the system will warn you and you will be unable to continue with your order until you remove that item from your shopping cart.
10. Repeat Steps 3-5 or Steps 6-9 until you have ordered all the items that you require.

**If you need to place a special item order with Corporate Express:-**

11. (H) Special Products.
12. Enter the Product Description that Corporate Express have advised (include the product code if known).
13. Enter the amount you want to request in the Unit Quantity field.
14. Enter the ex-GST price that Corporate Express have given you in the Price field.
15. Repeat steps 12–14 for each special item order you require.
16. (B) Add to Order.

**To complete your order and return the items to the ECU /Procurement system:-**

17. (H) View.
18. (B) Complete Order.
   
   **Note:** You can either update the Quantity Order here by amending the value in the Qty Order column and clicking the Update Order button, or you can wait and update the quantities back in the ECU /Procurement System. This is also true for deleting lines from your order.
19. (B) Return Cart.
   
   **Note:** A Security Warning is displayed at this point advising that the current web page is trying to open a site on your intranet. You need to choose Yes. If you choose No, your items will not be returned to the ECU /Procurement System and you will stay on the Corporate Express website until you answer Yes.
20. (B) Checkout.
   
   **Note:** Accept the defaults for the checkout process. We will cover making changes through the checkout process later in the section called “Complete the Checkout Process”.
21. Checkout: Requisition Information > (B) Next.
22. Checkout: Review Approver List > (B) Next.
23. Checkout: Review and Submit Requisition > (B) Submit.
Practice – Raising a Requisition using an External Catalogue

Overview

In this practice, you will do the following:

- Raise and submit a requisition using the external stationery catalog (Corporate Express).

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a requisition using an external catalogue

Complete the order and return the items to the ECU iProcurement system

Complete the checkout process to submit the requisition

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Creating a Requisition using an External Catalogue

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = Internet Procurement (ECU)

Create a requisition using an external catalogue

1. Navigate to the iProcurement homepage and open the Stationery Store.
   - (N) iProcurement homepage.
   - (H) Stationery.

2. Request the following products:

<table>
<thead>
<tr>
<th>Product</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>86849981</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>10000461</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Crayola graphite pencil 68-1908 pk8</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Uhu 40573 21gm multipak glue stick pkt 4</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Spirax 56598 lecture book a4 side opening 140page</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Special Item 43276211 Green Pencil</td>
<td>100</td>
<td>.45</td>
</tr>
<tr>
<td>42838013</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Exp8 stapler metal full strip 26/6 black</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Special Item 44930294 Bostick glue gun</td>
<td>1</td>
<td>5.94</td>
</tr>
<tr>
<td>Special Item 42948576 Wooden Ruler 60 cm</td>
<td>50</td>
<td>.39</td>
</tr>
</tbody>
</table>

Complete the order and return the items to the ECU iProcurement system

3. (H) View.
4. (B) Complete Order.
5. (B) Return Cart.
6. (B) Yes.
Complete the checkout process to submit the requisition

7. (B) Checkout.

8. (B) Next.

   If you have to Add an Approver’s Name at this point please select:
   - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   - ECUTRN, Trainer 14 if you are training at JOONDALUP
   - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

9. (B) Next.

10. (B) Submit.

Please note the following:

    Requisition Number: ____________
    Purchase Order Number: ____________
    Receipt Number: ____________
Agenda

- Raise a requisition using an external catalog
- **Raise a requisition using a non-catalog request**
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Raising a Requisition using a Non-Catalog Request

(N) iProcurement Homepage > (T) Shop > (H) Non-Catalog Request

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you can find alternate values.

Note: You should only create one requisition per Supplier (and Site). If you do, it can cause unnecessary delays and result in you having to cancel and reissue separate requisitions.

Hint: To avoid delays, it is recommended that you ring the Supplier before making a Non-Catalog Request to confirm the description and unit price (in particular) are correct.

To order items using a Non-Catalog Request:-
1. Navigate to the iProcurement homepage.
2. (T) Shop > (H) Non-Catalog Request.
3. If you use a Non-Catalog Request Store you may have to select the Request Type:-
   Request Type = New (default).
Note: The reason that you have to select a request type is that we have non-catalog item request templates that are used to default certain information for certain item purchases. For example if you explore the SOE Computers store you will notice that there are three templates associated with that store and specific information is defaulted to make it easier to order SOE Computers.

4. Item Type = Goods billed by quantity (usually, but can be one of the other options as shown below).
   - Goods billed by quantity (default): used when request item(s) at a set price and you receive a quantity.
   - Service billed by quantity: used when requesting service(s) at a set price and you receive a quantity.
   - Goods or services billed as an amount: used when requesting item(s) or service(s) when you need to receive dollar amounts and not quantities.

5. Item Description = Adequately describe the item you are requesting so that there is no ambiguity for the Supplier (this will avoid delays in receiving items).
   Note: If you are ordering more than one item make sure that your item descriptions differ because the system will take requisition lines that use the same Item Description, work out the best price and roll it into one line.

6. Category = The category that best describes the item you are ordering (category format is major category.minor category explanation: Stationery.Stationery).
   Hint: Use the Search and Select torch icon at the end of the field.

7. Quantity = How many of the items you are requesting do you want?
   Hint: Use the Search and Select torch icon at the end of the field.

8. Unit of Measure = The unit of measure that best suits the item you are ordering (usually, but not limited to, Each).
   Hint: Use the Search and Select torch icon at the end of the field.

9. Unit Price = Enter the unit price that the Supplier quoted you for this item.

10. Currency = AUD (defaulted, but not limited to).
    Note: Other currencies available for selection include:
        - USD – United States Dollar
        - GBP – Great British Pound
        - EUR - Euro
        - SGD - Singapore Dollar
        - MYR – Malaysian Ringgit

11. Contract Number = If you know the contract number for this Supplier, enter the information here. This field is not mandatory.

12. Supplier Name = Type in the name of the supplier you want to fulfill this requisition.
    Hint: Use the Search and Select torch icon at the end of the field.

13. Site = The supplier site you want the resulting purchase order to be communicated to.
    Note: If you used Search and Select to find a Supplier, the Supplier Site will also be completed (along with the Contact Name and Number, if this information exists).

14. Contact Name = If you know the name of a contact at the supplier that you want to reference on the resulting purchase order.
15. Phone = if you know the phone number of a contact at the supplier that you want to reference on the resulting purchase order.
   
   **Note:** If you used Search and Select to find a Supplier, the Supplier Site will also be completed (along with the Contact Name and Number, if this information exists).

16. Supplier Item = If the supplier has given you a specific item code.

17. (B) Add to Cart.

**If you want to request more than one item:**

18. Repeat steps 3-17, if you used a Non-Catalog Request Store, or steps 4-17 if you didn’t.

**Once you have requested all the items you need from this Supplier:**

19. Shopping Cart > (B) View Cart and Checkout.

20. (B) Checkout.
   
   **Note:** Accept the defaults for the checkout process. We will cover making changes through the checkout process later in the section called “Complete the Checkout Process”.

21. Checkout: Requisition Information > (B) Next.

22. Checkout: Review Approver List > (B) Next.

23. Checkout: Review and Submit Requisition > (B) Submit.
Practice – Raising a Requisition using a Non-Catalog Request

Overview

In this practice, you will do the following:

- Raise and submit a requisition using a non-catalog request.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a requisition using a non-catalog request

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: __________

Purchase Order Number: __________

Receipt Number: __________
Solution – Raising a Requisition using a Non-Catalog Request

Log on to the System

− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Create a requisition using a non-catalog request

1. Navigate to the /Procurement homepage and open a non-catalog request.
   • (N) /Procurement homepage.
   • (T) Shop > (H) Non-Catalog Request.
2. Add an item to your cart.
3. (B) Add to Cart.
4. Repeat steps 2 and 3 until you have 5 items in your shopping cart.
   Mix it up a bit with the item descriptions, categories, units of measure etc, but make sure to only use one Supplier and Site.

Complete the checkout process to submit the requisition

6. (B) View Cart and Checkout.
7. (B) Next.
   If you have to Add an Approver’s Name at this point please select:
   − ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   − ECUTRN, Trainer 14 if you are training at JOONDALUP
   − ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY
8. (B) Next.
9. (B) Submit.
Practice – Raising a Requisition using a Non-Catalog Request Store

Overview

In this practice, you will do the following:

• Raise and submit a requisition using a non-catalog request store (ECU SOE Computers).

Assumptions

• You must have access to the Training database on which to complete this practice.

• Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
– Username = ecutrnXX
– Password = ecutrnXX
– Responsibility = ECU Purchasing User

Create a requisition using a non-catalog request store

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Raising a Requisition using a Non-Catalog Request Store

Log on to the System

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a requisition using a non-catalog request store

1. Navigate to the iProcurement homepage and open the Stationery Store.

   - (N) iProcurement homepage.
   - (T) Shop > (H) ECU SOE Computers.

2. Create two lines on the requisition. One for each of the following Request Types:
   - ECU SOE Desktop Computer
   - ECU SOE Laptop Computer

   Note the information that defaults and the new field that appears where you must enter the Supplier Quote Number.

Complete the checkout process to submit the requisition

3. (B) View Cart and Checkout.

4. (B) Next.

   If you have to Add an Approver’s Name at this point please select:
   - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   - ECUTRN, Trainer 14 if you are training at JOONDALUP
   - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

5. (B) Next.

6. (B) Submit.
Practice – Raising a Foreign Currency Requisition using a Non-Catalog Request

Overview

In this practice, you will do the following:

- Raise and submit a foreign currency requisition using a non-catalog request to American Training Institute.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.
- Responsibility selected to complete this practice is Internet Procurement (ECU).

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a foreign currency requisition using a non-catalog request

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Raising a Foreign Currency Requisition using a Non-Catalog Request

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a foreign currency requisition using a non-catalog request

1. Navigate to the iProcurement homepage and open a non-catalog request.
   - (N) iProcurement homepage.
   - (T) Shop > (H) Non-Catalog Request.

2. Create two lines on the requisition (making sure to change the currency to USD).

Complete the checkout process to submit the requisition

3. (B) View Cart and Checkout.

4. (B) Next.

   If you have to Add an Approver’s Name at this point please select:
   - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   - ECUTRN, Trainer 14 if you are training at JOONDALUP
   - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

5. (B) Next.

6. (B) Submit.
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- **Copy an existing requisition**
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Copying an existing Requisition

(N) iProcurement Homepage > My Requisitions > (I) Copy
OR
(N) iProcurement Homepage > My Requisitions > (H) Requisition Number > (B) Copy

**Note:** If you choose the second method of copying a requisition you will see the screenshot above, otherwise you will be taken straight to the Checkout screen.

You copy the item information from an original requisition into the shopping cart.

If your shopping cart already contains items, the system gives you a choice of the following:
- Add the copied items to the cart.
- Replace the cart with the copied items (saving the previous cart as an Incomplete requisition).

You can copy any requisition, irrespective of its status.
To copy an existing requisition:-
1. Navigate to the iProcurement homepage.
   OR
3. Navigate to the iProcurement homepage.
4. My Requisitions > (H) Requisition Number.
5. (B) Copy to Cart.
   Note: The buttons that are available for you to click on may vary depending on the status of the requisition, if it has been cancelled, or received, etc.
6. (B) Checkout.
   Note: Accept the defaults for the checkout process. We will cover making changes throughout the checkout process later in the section called “Complete the Checkout process”.
7. Checkout: Requisition Information > (B) Next.
8. Checkout: Review Approver List > (B) Next.
9. Checkout: Review and Submit Requisition > (B) Submit.
Practice – Copying an existing Requisition

Overview

In this practice, you will do the following:

- Copy the requisition you created in the practice called “Raising a Requisition using a Non-Catalog Request”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.
- Responsibility selected to complete this practice is Internet Procurement (ECU).

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = Internet Procurement (ECU)

Copy an existing requisition

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Copying an existing Requisition

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = Internet Procurement (ECU)

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   • (N) iProcurement homepage.
   • (T) Shop
   • My Requisitions > (I) Copy.

Complete the checkout process to submit the requisition
2. (B) Checkout.
3. (B) Next.
   If you have to Add an Approver’s Name at this point please select:
   − ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   − ECUTRN, Trainer 14 if you are training at JOONDALUP
   − ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY
4. (B) Next.
5. (B) Submit.
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Changing an existing Requisition

Before the requisition is placed on a purchase order: You can directly change a requisition line if it has not been placed on a purchase order. The system withdraws the requisition from the approval or purchase order creation process and places the requisition lines in your shopping cart. You can make changes and start the Checkout process.

Note: There will be no change history when you change a requisition before it is placed on a purchase order (only after).

After the requisition is placed on a purchase order: After a requisition line has been placed on an approved purchase order, you can request changes to specific attributes on the line and the corresponding purchase order. The buyer on the purchase order must accept the change request after which attributes on both requisition and purchase order will be updated. Select the line and click Change as described above.

If the requisition is Rejected or Returned: You can only resubmit the requisition (by first clicking Change).
To change an existing requisition:-
1. Navigate to the iProcurement homepage.
   OR
3. Navigate to the iProcurement homepage.
4. My Requisitions > (H) Requisition Number.
5. (B) Change.
   **Note:** The buttons that are available for you to click on may vary depending on the status of the requisition, if it has been cancelled, or received, etc.
6. You can change the Quantity ordered or cancelled on a requisition line.
   **Note:** The changes to the requisition will be submitted for approval again.
7. (B) Checkout.
   **Note:** Accept the defaults for the checkout process. We will cover making changes throughout the checkout process later in the section called “Complete the Checkout process”.
8. Checkout: Requisition Information > (B) Next.
10. Checkout: Review and Submit Requisition > (B) Submit.
Practice – Changing an existing Requisition

Overview

In this practice, you will do the following:

- Change the requisition you created in the practice called “Raising a Requisition using a Non-Catalog Request”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Change an existing requisition

Complete the checkout process to submit the requisition

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Changing an existing Requisition

Log on to the System
- Username = ecutrnnXX
- Password = ecutrnnXX
- Responsibility = ECU Purchasing User

Change an existing requisition

1. Navigate to the iProcurement homepage and change the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   - (N) iProcurement homepage.
   - (T) Shop
   - My Requisitions > (I) Change.

2. Change the quantity ordered on each line to something other than what it currently is.

Complete the checkout process to submit the requisition

3. (B) Checkout.

4. (B) Next.
   
   If you have to Add an Approver’s Name at this point please select:
   - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   - ECUTRN, Trainer 14 if you are training at JOONDALUP
   - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

5. (B) Next.

6. (B) Submit.

Note: Go back to the iProcurement homepage and take a look at the Approval History for this requisition.
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- **Save a cart to come back to later**
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Instructor Note: Why would you want to do this? If you are in the middle of putting together a requisition and are interrupted you can save the cart and come back to it later. Alternatively you may order the same items on a regular basis.

Saved carts appear in the Requisitions tab, in an Incomplete status.

Select the incomplete requisition and click Complete when you are ready to check out.

If you leave items in the cart when you check out, they will still be there when you log back in (i.e. as soon as you click the Add to Cart button the item stays in the cart until you delete it).

Note: You can modify the contents of a saved cart during the Checkout process.

Save a Shopping Cart:-
(N) iPProcurement Homepage > (H) My Requisitions > (H) Requisition Number > (B) Copy to Cart or (B) Complete

Since a saved cart appears as an incomplete requisition you can simply click on the requisition number of the cart you want to retrieve and choose to either Copy to Cart or Complete.
**Note:** If you choose Copy to Cart you are creating a whole new requisition, but if you choose Complete you will complete the current requisition and the requisition status will change from Incomplete to In Progress (or approved depending on your approval limit).

**Note:** If your cart already contains items and you choose Copy to Cart on an existing requisition the system will ask you if you want to replace the items currently in your cart, or add the new items to your existing cart.

**Retrieve a saved Shopping Cart:-**
(N) iProcurement Homepage > My Requisitions > (H) Requisition Number > (B) Complete or (B) Copy to Cart.

**Note:** If you click the Complete button the requisition number already assigned is used and is submitted for approval. If you click the Copy to Cart button a new requisition number is assigned and that is submitted, thereby leaving the original requisition as incomplete so that you can copy it again.

**Delete a saved Shopping Cart:-**
(N) iProcurement Homepage > My Requisitions > (H) Requisition Number > (B) Delete.
Practice – Saving a Shopping Cart

Overview

In this practice, you will do the following:

- Create and save a shopping cart.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a shopping cart

Save the shopping cart

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Saving a Shopping Cart

Log on to the System

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a shopping cart

1. Navigate to the iProcurement homepage and open a non-catalog request.
   - (N) iProcurement homepage.
   - (T) Shop > (H) Non-Catalog Request.
2. Add an item to your cart.
3. (B) Add to Cart.
4. Repeat steps 2 and 3 until you have 5 items in your shopping cart.
   Mix it up a bit with the item descriptions, categories, units of measure etc, but make sure to only use one Supplier and Site.

Save the shopping cart

3. (B) View Cart and Checkout.
4. (B) Save.
Practice – Retrieving a saved Shopping Cart

Overview

In this practice, you will do the following:

- Retrieve the shopping cart you saved in the practice called “Saving a Shopping Cart”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Retrieve a shopping cart

Complete the Checkout process to submit the shopping cart

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Retrieving a saved Shopping Cart

Log on to the System

– Username = ecutrnXX
– Password = ecutrnXX
– Responsibility = ECU Purchasing User

Retrieve a saved shopping cart

1. Navigate to the iProcurement homepage and open a non-catalog request.
   • (N) iProcurement homepage > (T) Shop.
   • My Requisitions > (H) Requisition Number (of the incomplete requisition you created in the practice “Saving a Shopping Cart”).

2. (B) Copy to Cart.

   **Remember:** if you click Complete you will use the requisition number already assigned, but if you click Copy to Cart you will create a new requisition (and number). Either option is valid, it really depends on the outcome you want to achieve. For the purposes of this exercise we will Copy to Cart.

3. Change the quantity on each line.

Complete the checkout process to submit the requisition

4. (B) Checkout.

7. (B) Next.

   If you have to Add an Approver’s Name at this point please select:
   – ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   – ECUTRN, Trainer 14 if you are training at JOONDALUP
   – ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

8. (B) Next.

9. (B) Submit.
Practice – Deleting a saved Shopping Cart

Overview

In this practice, you will do the following:

- Delete the saved cart you created in the practice called “Saving a Shopping Cart” and save a shopping cart.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Retrieving a shopping cart

Complete the Checkout process to submit the shopping cart
Solution – Deleting a saved Shopping Cart

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Create a shopping cart

1. Navigate to the iProcurement homepage and open a non-catalog request.
   - (N) iProcurement homepage > (T) Shop.
   - My Requisitions > (H) Requisition Number (of the incomplete requisition you created in the practice “Saving a Shopping Cart”).

2. (B) Delete.

3. Read the warning message.

4. (B) Yes.
Agenda

MANAGEMENT SERVICES CENTRE

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Create a Personal Favorites shopping list

Instructor Note: Why would you want do this? For frequently ordered items. Only problem is that you can’t change the price of the item (see Note below)

Taking the time to setup shopping lists initially, can save you time and speed up the requisitioning process for items that are frequently required at a later date.

Add items to your Personal Favorites shopping list:-

Add items to your Personal Favorites shopping list:-

(N) iProcurement Homepage > (T) Shop > (H) Non-Catalog Request > (B) Add to Favorites

Simply completing a Non-Catalog Request for the items you want to add to your shopping list and click the Add to Favorites button instead of the Add to Cart button.

Note: Once you have added an item to your favourites you can choose to add it to the cart also.

Note: You cannot create a shopping list from items brought back in from an external catalogue.

Note: If you do create a shopping list, please remember that you are unable to change the price of that item. This means that if the price of that item changes, you will need to remove it from your shopping list, and re-create it if you want to continue using it.
View your Personal Favorites shopping list:-
(N) iProcurement Homepage > (T) Shop > (H) Shopping Lists
When you are viewing your Personal Favorites shopping list you can very quickly and easily build your requisition because the details required to place a Non-Catalog Request have already been entered.

Note: You can repeatedly add items to requisitions from your Personal Favorites shopping list. Items will remain in the shopping list until you delete them.

Note: You are the only one who can view your Personal Favorites shopping list – you cannot share it with anyone.

Add items from your Personal Favorites shopping list to your Shopping Cart:-
(N) iProcurement Homepage > (T) Shop > (H) Shopping Lists > (B) Add to Cart
To add an item from your Personal Favorites shopping list to your Shopping Cart, simply display your Personal Favorites shopping list, enter the Quantity and click the Add to Cart button for the item(s) you want to request.

Delete items from your Personal Favorites shopping list:-
(N) iProcurement Homepage > (T) Shop > (H) Shopping Lists > (B) Delete from Favorites
When you no longer want an item to be listed in your Personal Favorites shopping list, simply display your shopping list and click the Delete from Favorites button for the item you want to delete.
Practice – Creating a Personal Favorites shopping list

Overview

In this practice, you will do the following:

• Create a Personal Favorites shopping list.

Assumptions

• You must have access to the Training database on which to complete this practice.

• Where XX is referenced, you will use the number shown on the training terminal you are using.

• Responsibility selected to complete this practice is Internet Procurement (ECU).

Tasks

Log on to the system

– Username = ecutrnXX
– Password = ecutrnXX
– Responsibility = Internet Procurement (ECU)

Create a personal favorites shopping list
Solution – Creating a Personal Favorites shopping list

Log on to the System
  – Username = ecutrnXX
  – Password = ecutrnXX
  – Responsibility = Internet Procurement (ECU)

Create a personal favorites shopping list

1. Navigate to the iProcurement homepage and open a non-catalog request.
   • (N) iProcurement homepage.
   • (T) Shop > (H) Non-Catalog Request.

2. Complete the form as if you were requesting an item.

3. (B) Add to Favorites.

   Add a total of 5 lines. Mix it up a bit with the item descriptions, categories, units of measure, AND Suppliers.
Practice – Viewing your Personal Favorites shopping list

Overview

In this practice, you will do the following:

- View the Personal Favorites shopping list you created in the practice called “Creating a Personal Favorites shopping list”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

View a personal favorites shopping list
Solution – Viewing your Personal Favorites shopping list

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

View a personal favorites shopping list

1. Navigate to the iProcurement homepage and open the shopping lists page.
   - (N) iProcurement homepage.
   - (T) Shop > (H) Shopping Lists.

   Note: All the items you added to your Personal Favorites shopping list in the practice called “Creating a Personal Favorites shopping list” should be listed.

3. Scroll through the list to confirm that list contains all the items you added in the previous practice.
Practice – Adding items from your Personal Favorites shopping list to your Shopping Cart

Overview

In this practice, you will do the following:

- Add items from the Personal Favorites shopping list you created in the practice called “Creating a Personal Favorites shopping list” to your shopping cart.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Add items from your personal favorites shopping list to your shopping cart

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Adding items from your Personal Favorites shopping list to your Shopping Cart

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Add items from your personal favorites shopping list to your shopping cart
1. Navigate to the iProcurement homepage and open the shopping lists page.
   • (N) iProcurement homepage.
   • (T) Shop > (H) Shopping Lists.

2. Scroll through the list and click the Add to Cart button for each item in your Personal Favorites shopping list.

Complete the checkout process to submit the requisition
3. (B) View Cart and Checkout.
4. (B) Next.
   If you have to Add an Approver’s Name at this point please select:
   - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   - ECUTRN, Trainer 14 if you are training at JOONDALUP
   - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY
5. (B) Next.
6. (B) Submit.
Practice – Deleting items from your Personal Favorites shopping list

Overview

In this practice, you will do the following:

- Delete the items you added to your Personal Favorites shopping list in the practice called “Creating a Personal Favorites shopping list”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Delete items from your personal favorites shopping list
Solution – Deleting items from your Personal Favorites shopping list

Log on to the System

− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Delete items from your personal favorites shopping list

1. Navigate to the iProcurement homepage and open the shopping lists page.
   • (N) iProcurement homepage.
   • (T) Shop > (H) Shopping Lists.

2. (B) Delete from Favorites.

3. (B) Yes (to confirm the deletion).

4. Repeat steps 2 – 3 until you have deleted all the items listed in your personal favorites shopping list.
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- **Complete the Checkout process**
- Check the status of Requisitions
- Cancel a Requisition
Complete the Checkout process: Requisition Information

(N) iProcurement Homepage > Shopping Cart > (B) Checkout

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen where you can find alternate values.

Delivery:
Requisition Description = a meaningful description to help you identify this requisition later.
Need By Date = by default this is 2 days beyond the current date, but you can overwrite this default with a more appropriate date as required.
Requestor = by default this is your name, however, if you are raising this requisition on behalf of someone else you can change this to their name.

Note: You can only change the name to another Oracle iProcurement user.

Note: Even if you change the requestor’s name the approval process will still follow your approval path.
Deliver-To Location = by default this is the location specified in your Internet Procurement preferences, but you can overwrite it now to have this particular requisition delivered to another location within the University.

**Note:** The naming convention is CAMPUS.BUILDING.ROOM e.g. JO.1.2101

**Billing:-**
Most of this section relates to Project Accounting which is not currently implemented at ECU. The two fields you do need to complete are:

- **Taxable** = Is this requisition subject to tax (GST)? In all cases you should leave this value set at the default of Yes.
- **Tax Code** = Specify which tax code is applicable to this requisition. In most instances this will be either GST (10%) or Free-GST.

**Note:** You can change the tax code at a line level if some of the items you have ordered are subject to tax, and some are not.

**Note:** You can pick any of the following tax codes:
- GST (10%) – University purchases where Suppliers will charge GST.
- INP-TAX – University purchases where Suppliers will charge GST and the University is not entitled to claim (i.e. Student Housing).
- NON-REP – NON-REPORTABLE payments (i.e. interest, wages, internal).
- Free-GST – University purchases where Suppliers will not charge GST.
- PAYG-WH (48.5%) – University purchases where Suppliers have not provided an ABN or a submitted a signed Statement by Supplier to indicate that they are not required to quote an ABN.

If you need to change any of this information for individual lines:-

- (B) Edit Lines.

If you want to proceed to the next step (and accept the defaulted information against the requisition lines):-

- (B) Next.

If you are happy with the requisition and want to submit it for approval:-

- (B) Submit.

If you want to cancel out of the Checkout process and return to viewing your Shopping cart:-

- (B) Cancel.

**Note:** When you are more confident using iProcurement, you can either click the Next button to move to the “Review Approver List” step, or even just choose to submit the requisition at this point by clicking the Submit button. When you click this Submit button at this point the system uses default values from your purchasing user setup, your profile options and from your Internet Procurement Preferences. If the requisition is not in a submittable state when you click the Submit button, the system will advise you and you will be unable to submit it until the problem is resolved.
Complete the Checkout process: Edit Lines Delivery

(N) iProcurement Homepage > Shopping Cart > (B) Checkout > (B) Edit Lines

**Note:** Fields marked with a blue asterisk are mandatory and require a value.

**Note:** Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

**Edit lines if you want to do any of the following:-**

- Edit the default account information. This information is already entered for you based on your Purchasing User setup, your profile options and your Internet Procurement preferences, but you can change it if desired.
- View additional line details. The first step of the checkout process shows only fields that apply to all lines.
- Vary information (such as delivery information) by line.
- Add line-level attachments.

**On the Delivery tab you can:-**

- Change the Need By Date for each individual line.
• Change the Requestor for each individual line.
• Change the Deliver-To Location for each individual line.

**To edit several lines at once:**

- Put a tick in the Select column checkboxes for the lines you want to edit.
- (B) Update.
- Make the required changes.
- (B) Return.

**If you have made all the changes you needed to make on the requisition lines:**

- (B) Return.

**If you want to make further changes to the requisition lines:**

- (T) Billing – mostly related to Project Accounting, but you can change the tax code on this tab, if required.
- (T) Accounts – change the charge account, or split a cost between multiple charge accounts.
- (T) Attachments – attach a file specific to an individual requisition line (we will cover attaching a file to the requisition in Step 2 of 3 Review Approver List).
Complete the Checkout process: Edit Lines - Billing

(N) iProcurement Homepage > Shopping Cart > (B) Checkout > (B) Edit Lines > (T) Billing

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

On the Billing tab you can:-

• Change the Tax Code for each individual line.
  
  Note: The other fields on the screen relate to Project Accounting which ECU does not currently haveimplemented.

To edit several lines at once:-

• Put a tick in the Select column checkboxes for the lines you want to edit.
  
  • (B) Update.
  
  • Make the required changes.
  
  • (B) Return.
If you have made all the changes you needed to make on the requisition lines:-

• (B) Return.

If you want to make further changes to the requisition lines:-

• (T) Delivery – change the Deliver-To Location, the Need By Date, and the Requestor.
• (T) Accounts – change the charge account, or split a cost between multiple charge accounts.
• (T) Attachments – attach a file specific to an individual requisition line (we will cover attaching a file to the requisition in Step 2 of 3 Review Approver List).
Complete the Checkout process: Edit Lines Billing

(N) iProcurement Homepage > Shopping Cart > (B) Checkout > (B) Edit Lines > (T) Accounts

Note: Fields marked with a blue asterisk are mandatory and require a value.
Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

On the Accounts tab you can:-
• Change the Charge Account for each individual line.
• Split the payment across multiple charge accounts.

To edit several lines at once:-
• Put a tick in the Select column checkboxes for the lines you want to edit.
• (B) Update.
• Make the required changes.
• (B) Return.
If you want to change the charge account:-

- (H) Charge Account
- If you created a favourite charge account (or several) you will be able to use them by selecting the name you gave it in the Nickname field (thereby removing the need to manually code the ECU Flexfield Accounting field).
- If you didn’t create a favourite charge account you can type in the full flexfield combination (Project.Cost Centre.Account.Activity.Location.Company) you want code each individual line to.
- (B) Return.

If you want to split a payment across multiple charge accounts:-

- (I) Split or (H) Charge Account.
- (B) Add Another Row.
- If you created a favourite charge account (or several) you will be able to use them by selecting the name you gave it in the Nickname field (thereby removing the need to manually code the ECU Flexfield Accounting field).
- If you didn’t create a favourite charge account you can type in the full flexfield combination (Project.Cost Centre.Account.Activity.Location.Company) you want code each individual line to.
- Enter the percentage split in the Percent column OR the Quantity split in the Quantity column (making a change in one drives a change in the other).
- Note: You will receive an error message if you try to enter percentages that do not total 100%.
- The Amount field will automatically updated based upon the split you have chosen.
- (B) Return.
  Note: When you split the charge account for a line and then return to the Edit Lines – Accounts page you will notice that the Charge Account for that line is listed as Multiple.

If you have made all the changes you needed to make on the requisition lines:-

- (B) Return.

If you want to make further changes to the requisition lines:-

- (T) Delivery – change the Deliver-To Location, the Need By Date, and the Requestor.
- (T) Billing – mostly related to Project Accounting, but you can change the tax code on this tab, if required.
- (T) Attachments – attach a file specific to an individual requisition line (we will cover attaching a file to the requisition in Step 2 of 3 Review Approver List).
Complete the Checkout process: Edit Lines Attachments

(N) Procurement Homepage > Shopping Cart > (B) Checkout > (B) Edit Lines > (T) Attachments

**Note:** Fields marked with a blue asterisk are mandatory and require a value.

**Note:** Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

**Note:** When you receive written quotes from Suppliers, these quotes should be scanned and attached to the requisition to satisfy the audit requirement for you to demonstrate that the three required quotes have been obtained when the order is over $5,000. When attaching the quotes, please attach either as Internal to Requisition or To Approver.

**On the Attachments tab you can:-**

- Add attachments to the requisition.
- Add attachments to the individual requisition lines.

**If you want to add an attachment to the requisition:-**
• Requisition Attachments > (B) Add Attachments.
• Enter a Description of the attachment.
• Select a Category.
  **Note:** Valid categories to select from are:
  - Internal to Requisition
  - Miscellaneous
  - To Approver
  - To Buyer
  - To Supplier
  - To Receiver
  In most instances will want to attach something to the Approver or to the Supplier.
• Select the Type of Attachment.
  **Note:** Valid Attachment Types to select from are:
  - File
  - URL
  - Text
• Along side the Attachment Type you selected you will need to provide additional information.
  **Note:** Ensure that you provide the appropriate information:
  - If you selected Type = File: use the Browser button to locate the file that you want to attach.
  - If you selected Type = URL: type in the web address that you want to attach.
  - If you selected Type = Text: Type in the text you want to attach (and optionally provide a Name for the text attachment).
  
  (B) Apply.
  **Note:** There will be information displayed in the Requisition Attachments section to let you know if there is an attachment to the overall requisition.

**If you want to add attachments to a requisition line:-**
• Requisition Line Attachments > (I) Attachments.
• Enter a Description of the attachment.
• Select a Category.
  **Note:** Valid categories to select from are:
  - Internal to Requisition
  - Miscellaneous
  - To Approver
  - To Buyer
  - To Supplier
  - To Receiver
  In most instances will want to attach something to the Approver or to the Supplier.
• Select the Type of Attachment.
  **Note:** Valid Attachment Types to select from are:
Along side the Attachment Type you selected you will need to provide additional information.

**Note:** Ensure that you provide the appropriate information:
- If you selected Type = File: use the Browser button to locate the file that you want to attach.
- If you selected Type = URL: type in the web address that you want to attach.
- If you selected Type = Text: Type in the text you want to attach (and optionally provide a Name for the text attachment).

- (B) Apply.
  **Note:** There will be an additional icon displayed against a requisition line that has an attachment so that you can easily identify it.

**If you have made all the changes you needed to make on the requisition lines:-**
- (B) Return.

**If you want to make further changes to the requisition lines:-**
- (T) Delivery – change the Deliver-To Location, the Need By Date, and the Requestor.
- (T) Billing – mostly related to Project Accounting, but you can change the tax code on this tab, if required.
- (T) Accounts – change the charge account, or split a cost between multiple charge accounts.
Complete the Checkout process Add Attachments
Complete the Checkout process: Review Approver List (Step 2 of 3)

(N) iProcurement Homepage > Shopping Cart > (B) Checkout > (B) Next

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

Approver List:

If you do not have the authority to approve the flexfield and dollar amount (including tax) the system will attempt to find someone in your approval path that can. If the system is unable to find someone the Approver Name will be shown as “No data exists”. Usually the system will at least find Pelham, Mr. Stephen as he is the Strategic Procurement Manager and sits at the top of the purchasing approval hierarchy.

Regardless of whether the system finds an approver for your requisition, or not, you can always elect to change the first approver or add another approver.

Note: make sure that the approver you use can authorise for both the flexfield AND the dollar value (including tax).
To Add an Approver:-
- (B) Add Approver.
- Type in the Approver’s Name you want to add (format = Surname, First Name OR Surname, Title, First Name).
- If you already had an Approver in the Approval List, identify if you want the newly added Approver to receive an email notification BEFORE, or AFTER the existing Approver by using the pulldown list.

To Change the First Approver:-
- (B) Change First Approver.
- Type in the New First Approver’s Name.
- (B) Apply.

To Delete an Approver:-
- (I) trashcan in the Delete column on the same line as the name of the Approver that you want to remove from Approval List.
  Note: You can only delete Approvers that you have manually added to the Approval List.

To Reset the Approval List:-
- (B) Reset Approval List
  Note: This button is only available once you have made changes to the Approval List.

If you want to justify the requisition to the Approver:-
- Type in the reason you are raising the requisition in the Justification field.

If you want to add a Note to the Buyer:-
- Type in a note in the Note To Buyer field
  Note: This information is displayed to the ECU Buyer and is not transmitted to the Supplier. You would use this field, for example, if you were requesting item to be bought from a Supplier in direct competition with one of our Preferred Suppliers (see list available at http://www.ecu.edu.au/msc/sp/prefsuppllist/index.html and you wanted to advise the Buyer).

Attachments:-

Note: When you receive written quotes from Suppliers, these quotes should be scanned and attached to the requisition to satisfy the audit requirement for you to demonstrate that the three required quotes have been obtained. When attaching the quotes, please attach either as Internal to Requisition or To Approver.

If you want to add an attachment to the requisition:
- Requisition Attachments > (B) Add Attachments.
- Enter a Description of the attachment.
• Select a Category.
  Note: Valid categories to select from are:
  - Internal to Requisition
  - Miscellaneous
  - To Approver
  - To Buyer
  - To Supplier
  - To Receiver
  In most instances you will want to attach something to the Approver or to the Supplier.
• Select the Type of Attachment.
  Note: Valid Attachment Types to select from are:
  - File
  - URL
  - Text
  • Along side the Attachment Type you selected you will need to provide additional information.
    Note: Ensure that you provide the appropriate information:
    - If you selected Type = File: use the Browser button to locate the file that you want to attach.
    - If you selected Type = URL: type in the web address that you want to attach.
    - If you selected Type = Text: Type in the text you want to attach (and optionally provide a Name for the text attachment).
    • (B) Apply.
  Note: There will be information displayed in the Requisition Attachments section to let you know if there is an attachment to the overall requisition.

If you want to save the changes you have made so that you can come back to them later:-
  • (B) Save.

If you want to proceed to the next step (Review and Submit Requisition):-
  • (B) Next.

If you want to go back to the previous step (Requisition Information):-
  • (B) Back.

If you are happy with the requisition and want to submit it for approval:-
  • (B) Submit.
Complete the Checkout process: Review Approver List (Step 3 of 3)

(N) iProcurement Homepage > Shopping Cart > (B) Checkout > (B) Next

Note: Fields marked with a blue asterisk are mandatory and require a value.
Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

If you want to save the changes you have made so that you can come back to them later:-
• (B) Save.

If you want to go back to the previous step (Review Approver List):-
• (B) Back.

If you want to print a copy of the requisition for your own records:-
If you want to see requestor, delivery, supplier and billing details:
• (H) Show (for each line you want to show the additional details).
If you want to hide requestor, delivery, supplier and billing details (after electing the show them):

- (H) Hide (for each line you want to hide the additional details).
- (B) Printable Page
- (M) File > Print (on the browser menu) OR (B) Printer (on browser toolbar).

**Note:** the Printable Page is displayed in a new browser window, so you can simply close that window when you are ready. If your iProcurement Review and Submit window is not visible, look for it on your Windows taskbar and open it from there.

**If you are ready to submit the requisition for approval:-**

- (B) Submit
### Complete the Checkout process: Printable Page

#### Management Services Centre

**Checkout: Review and Submit Requisition**

**Requisition 283: Total 2499.00 AUD**

**Created By:** King, AB

Created Date: 11-Nov-2005 23:00:00

**Description:** Standard ECU Executive SDE desktop

**Last Updated By:** AM

Last Updated Date: 11-Nov-2005

**Cost Center:** 1000.00 AUD

**Project:** ECU000 3100

**Task:** 3100.00 AUD

**Expenditure Type:** Expense

**Percent:** 100

**Expenditure Organization:** VICTORIA PARK

**Expenditure Item Date:** 21-01-2006

**Contacts:**
- Supplier Contact: VICTORIA PARK
- Supplier Information: VICTORIA PARK

**Billing Information**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Standard ECU Executive SDE desktop</td>
<td>2950.00</td>
<td>1</td>
<td>2950.00</td>
</tr>
</tbody>
</table>

**Invoice Account:**

<table>
<thead>
<tr>
<th>Account</th>
<th>Number</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECU000 3100 SDE 3100.00</td>
<td>2499.00 AUD</td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 2499.00 AUD

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**Oracle 11i - Procurement: Raising Requisitions**

Revision V 1.0

Effective 5 December 2005

Chapter 6 - Page 74
Practice – Changing the Deliver-To Address

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can change the deliver-to address during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Change the deliver-to address during the checkout process

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Changing the Deliver-To Address

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Copy an existing requisition

1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   • (N) iProcurement homepage.
   • (T) Shop
   • My Requisitions > (I) Copy.

Change the deliver-to address during the checkout process

2. (B) Checkout

If you want to change the Deliver-To Location for the whole requisition, goto task #3. Otherwise, goto task #4.

3. Change the value in the Deliver-To Location field to BU.02.140 to change the Deliver-To Location for the entire requisition.

Goto task #7

4. (B) Edit Lines.

5. Change the value in the Deliver-To Location field to be different for each line.

6. (B) Return.

7. (B) Next.

   If you have to Add an Approver’s Name at this point please select:
   − ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
   − ECUTRN, Trainer 14 if you are training at JOONDALUP
   − ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

8. (B) Next.

9. (B) Submit.
Practice – Splitting the Charge Account

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can split the charge account during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Split the Charge Account during the checkout process

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Splitting the Charge Account

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   - (N) iProcurement homepage.
   - (T) Shop
   - My Requisitions > (I) Copy.

Split the charge account during the checkout process
2. (B) Checkout.
3. (B) Edit Lines.
4. (T) Accounts.
5. (I) Split.
6. (B) Add Another Row.
7. Use the pulldown in the Nickname field to select one of the ‘Favorite Charge Accounts’ you created in the practice called “Creating a Favorite Charge Account” (ref Chapter 5).
8. Update the Percent, Quantity or Amount field to reflect the split you want.
   Remember: Changing the value in one of these columns drive a change in the others.
9. Repeat Steps 6 – 8 until you have split the charge account as you want it.
10. (B) Return.
11. (B) Return.
12. (B) Next.
    If you have to Add an Approver’s Name at this point please select:
    - ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
    - ECUTRN, Trainer 14 if you are training at JOONDALUP
    - ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY
13. (B) Next.
14. (B) Submit.
Practice – Attaching to a Requisition

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can attach a file during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Attach a file to a requisition line during the checkout process

OR

Attach a file to a requisition during the checkout process (Method I)

OR

Attach a file to a requisition during the checkout process (Method II)

Please note the following:

☐ Line Attachment, or

☐ Requisition Attachment (Method I), or

☐ Requisition Attachment (Method II).

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Attaching to a Requisition

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   - (N) iProcurement homepage.
   - (T) Shop
   - My Requisitions > (I) Copy.

Attach a file to a requisition line during the checkout process
2. (B) Checkout.
3. (B) Edit Lines.
4. (T) Attachments.
5. (I) Attachments.
6. Description = specification drawing.
7. Category = To Approver.
8. Type = File.
9. (B) Browse.
10. Select a file to attach.
11. (B) Open.
12. Name = Specifications.
13. (B) Apply.
   
   Note: You can add more than one attachment to a line at once, if required.
14. Repeat Steps 5 – 13 for each line you want to add an attachment to.
15. (B) Return.
16. (B) Next.
If you have to Add an Approver’s Name at this point please select:
− ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
− ECUTRN, Trainer 14 if you are training at JOONDALUP
− ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

17. (B) Next.
18. (B) Submit.

**Attach a file to a requisition during the checkout process (Method I)**

19. (B) Checkout.
20. (B) Edit Lines.
21. (T) Attachments.
22. (B) Add Attachments.
23. Description = 3 written quotes.
24. Category = To Approver.
25. Type = File.
26. (B) Browse.
27. Select a file to attach.
28. (B) Open.
29. Name = Written Quotes.
30. (B) Apply.

*Note:* You can add more than one attachment to a requisition at once, if required.

31. (B) Return.
32. (B) Next.

If you have to Add an Approver’s Name at this point please select:
− ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
− ECUTRN, Trainer 14 if you are training at JOONDALUP
− ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

33. (B) Next.
34. (B) Submit.

**Attach a file to a requisition during the checkout process (Method II)**

35. (B) Checkout.
36. (B) Next.

If you have to Add an Approver’s Name at this point please select:
  – ECUTRN, Trainer 01 if you are training at MOUNT LAWLEY
  – ECUTRN, Trainer 14 if you are training at JOONDALUP
  – ECUTRN, Trainer 36 if you are training at CHURCHLANDS or BUNBURY

37. (B) Add Attachments.

38. Description = Justification.

39. Category = To Approver.

40. Type = File.

41. (B) Browse.

42. Select a file to attach.

43. (B) Open.

44. Name = Required Justification.

45. (B) Apply.

Note: You can add more than one attachment to a requisition at once, if required.

46. (B) Next.

47. (B) Submit.
Practice – Changing the First Approver

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can change the first approver during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Change the first approver during the checkout process

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Changing the First Approver

Log on to the System
- Username = ecutrnx
- Password = ecutrnx
- Responsibility = ECU Purchasing User

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   - (N) iProcurement homepage.
   - (T) Shop
   - My Requisitions > (I) Copy.

Changing the first approver during the checkout process
2. (B) Checkout.
3. (B) Next.
4. (B) Change First Approver.
5. New First Approver = ECUTRN, Trainer 01, ECUTRN, Trainer 14, or ECUTRN, Trainer 36. Your trainer will be able to advise which value you should use.
6. (B) Apply.
7. (B) Next.
8. (B) Submit.
Practice – Adding an Approver

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can add an approver during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Add an approver during the checkout process

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Adding an Approver

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   • (N) iProcurement homepage.
   • (T) Shop
   • My Requisitions > (I) Copy.

Add an approver during the checkout process
2. (B) Checkout.
3. (B) Next.
4. (B) Add Approver.
5. Approver Name = ECUTRN, Trainer 01, ECUTRN, Trainer 14, or ECUTRN, Trainer 36. Your trainer will be able to advise which value you should use.
6. Select After, so that this new Approver receives the notification after your existing Approver.
7. (B) Next.
8. (B) Submit.
Practice – Putting it all together

Overview

In this practice, you will do the following:

- Copy an existing requisition so that you can make multiple changes to one requisition during the checkout process.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Copy an existing requisition

Make multiple changes during the checkout process

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________

I made the following changes to my requisition before submitting it:

____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
Solution – Putting it all together

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Copy an existing requisition
1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   • (N) iProcurement homepage.
   • (T) Shop
   • My Requisitions > (I) Copy.

Make multiple changes during the checkout process
2. (B) Checkout.
   No help this time – make the changes that you think you might have to make to a requisition when you get back to your workplace.
3. (B) Submit.
Practice – Printing a copy of a Requisition

Overview

In this practice, you will do the following:

• Copy an existing requisition so that you can print a copy of it just before you submit it.

Assumptions

• You must have access to the Training database on which to complete this practice.
• Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
– Username = ecutrnXX
– Password = ecutrnXX
– Responsibility = ECU Purchasing User

Copy an existing requisition

Print a copy of the requisition before you submit it

Please note the following:

Requisition Number: ____________

Purchase Order Number: ____________

Receipt Number: ____________
Solution – Print a copy of a Requisition

Log on to the System

− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Copy an existing requisition

1. Navigate to the iProcurement homepage and copy the requisition created in the practice called “Raising a Requisition using a Non-Catalog Request”.
   
   • (N) iProcurement homepage.
   
   • (T) Shop
   
   • My Requisitions > (I) Copy.

Print a copy of the requisition before you submit it

2. (B) Checkout.

3. (B) Next.

4. (B) Next.

5. (H) Show to see more details on a line.

6. (H) Hide to see fewer details on a line.

7. (B) Printable Page.

   Note: How the page is presented when the Printable Page button is clicked is how the page will display for printing.

8. (M) File > Print (on the browser menu) or (B) Print (on the browser toolbar)

   Note: the Printable Page is displayed in a new browser window, so you can simply close that window when you are ready. If your iProcurement Review and Submit window is not visible, look for it on your Windows taskbar and open it from there.

9. (B) Submit.
Agenda

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Check the status of a Requisition

(N) iProcurement Homepage > My Requisitions > (H) Status
OR
(N) iProcurement Homepage > (T) Requisitions > (H) Status

After you complete and submit a requisition it is forwarded to your approver(s) (if it is outside your own approval limit). Once the requisition is approved, a Buyer assigns a Purchase Order number to the requisition and communicates the order to the Supplier.

The most recently created requisitions are listed in the middle of the iProcurement homepage > (T) Shop. You can also view all your requisitions in the Requisitions tab.

A requisition can be in any one of the following statuses at any one time:-
- An **Incomplete** requisition is a saved cart.
- A **Pre-Approved** requisition is approved, but forwarded to another approver.
- **Rejected** has been rejected by your approver.
- **Returned** is where no approver is found, or the buyer has returned the requisition without creating a purchase order.
- An **In-Process** requisition has been submitted but not yet approved.
- **Approved** means the requisition is ready for a Buyer to convert it to an order and communicate it to the Supplier.
- A **Cancelled** requisition has been approved for cancellation.
- **Requires Reapproval** means that you or an approver made a change that requires reapproval.

You can view the Approval History of a requisition by clicking the Status link for that requisition. The Approval History will show you what date and time you submitted the requisition for approval, who is the next person in the approval process, and what date time they actioned their notification.

**Note:** When your requisition is submitted for approval (and is outside your own approval authority) an email is generated to an Approver to alert them to the fact that there is a requisition that requires their attention. If they don’t action the requisition on this first email notification, in one day, the notification is cancelled and a reminder is issued. The Approver the has two days to respond to this reminder. If the requisition is still not actioned the system cancels the reminder notification and issues a final reminder. Again the Approver has two days to action the requisition. If the requisition still hasn’t been actioned two days after the system issued the final reminder the requisition is returned to you with a status of RETURNED. You will receive an email notification advising you that no Approver was found for your requisition. You can elect to submit the requisition again either as it is, or you can change the Approver during the Checkout process.

**Note:** On the Requisitions tab you can not only see the Status of your requisitions you can see the Purchase Order number (once one has been created from your requisition).

**Note:** If you want to see the lines of a requisition either click the Requisition Number or the Requisition Description. If you want to see further details relating to receipts and payments, you can click on the Details icon show on each line of the requisition.

**Note:** if you make changes to a requisition that has a status of “In Process” the requisition will be removed from the approval process until you have made your changes and resubmit it.

**Note:** To see why your requisition was rejected or returned you can click on the Status. If a reason was provided it will be displayed in the notes column.
Search for a Requisition

(N) iProcurement Homepage > (T) Requisitions > (B) Search

After you complete and submit a requisition it is forwarded to your approver(s) (if it is outside your own approval limit). Once the requisition is approved, a Buyer assigns a Purchase Order number to the requisition and communicates the order to the Supplier.

If you want to search for requisitions specifying certain search criteria:-

• Enter the search criteria you want to search on.
• (B) Go.

If you want to clear the search criteria:-

• (B) Clear.

To return to the Requisition List:-

• (B) Views.
Finding More Information about a Requisition

If you want to know if an invoice has been matched to your requisition, and if that invoice has been paid:-

- Click on the Requisition Number or Requisition Description.
- (I) Details.
- Review the information displayed.
- (B) OK.
Practice – Checking the status of Requisitions

Overview

In this practice, you will do the following:

• Check the status of the requisitions that you created today.

Assumptions

• You must have access to the Training database on which to complete this practice.

• Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Check the status of requisitions

Have a look in the Status column and answer the following question:

How many requisitions have been approved? ______________________________________

How many requisitions are pre-approved? _______________________________________

How many requisitions are incomplete? _________________________________________

Why are they incomplete? _____________________________________________________

How many requisitions have become purchase orders? ______________________________
Solution – Checking the status of Requisitions

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Check the status of requisitions
1. Navigate to the iProcurement homepage and display the full list of requisitions you created today.
   - (N) iProcurement homepage.
   - (T) Shop.
   - My Requisitions.
   - (B) Full List.

Have a look in the Status column and answer the following question:
How many requisitions have been approved? ________________________________
How many requisitions are pre-approved? ________________________________
How many requisitions are incomplete? ________________________________
Why are they incomplete? ____________________________________________
How many requisitions have become purchase orders? ________________________________
Practice – Searching for specific Requisitions

Overview

In this practice, you will do the following:

- Search for requisitions using different criteria.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Search for specific requisitions

Enter search criteria to determine the answers to the following questions:

2. How many requisitions did you raise to Corporate Express Australia Ltd, KEWDALE? __
3. How many requisitions has the person sitting to your right raised today? _______________
4. What time did you raise your last requisition? ________________________________
5. Has your last requisition been approved yet? ________________________________
6. What is the PO number of the first requisition you created today? _________________
7. Who approved the first requisition you created today? _________________________
8. What time they approve it? ____________________________________________

One last thing:

9. Query up all your requisitions and go back to the practices where you created them so that you can record the PO number for each of them (if you haven’t already).
Solution – Searching for specific Requisitions

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Search for specific requisitions

1. Navigate to the iProcurement homepage and display the full list of requisitions you created today.
   - (N) iProcurement homepage.
   - (T) Requisitions.
   - (B) Search.
   - <enter search criteria>
   - (B) Go.

Enter search criteria to determine the answers to the following questions:

2. How many requisitions did you raise to Corporate Express Australia Ltd, KEWDALE? ___
3. How many requisitions has the person sitting to your right raised today? _______________
4. What time did you raise your last requisition? ________________________________
5. Has your last requisition been approved yet? _________________________________
6. What is the PO number of the first requisition you created today? ________________
7. Who approved the first requisition you created today? _________________________
8. What time they approve it? _____________________________________________

One last thing:

9. Query up all your requisitions and go back to the practices where you created them so that you can record the PO number for each of them.
Practice – Finding more information about a Requisition

Overview
In this practice, you will do the following:

• Find out if a requisition has been paid, and on what payment number.

• Find out if an invoice has been raised against a requisition, and if that invoice is on hold.

• Find out if the requisition has been received, and by whom.

Assumptions

• You must have access to the Training database on which to complete this practice.

• Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Find more information about a requisition

Answer the following questions:
2. Who received this requisition? ____________________________________________
3. What is their phone number? ____________________________________________
4. What invoice number relates to this requisition? __________________________
5. When was the invoice paid? ____________________________________________
6. (B) Ok.
7. (H) Return.

Find out more about another requisition
13. The invoice relating to this requisition is on hold, why? ____________________

14. Which supplier was this requisition raised to? ____________________________
15. What is the purchase order that was created from this requisition? 

16. When was the invoice due to be paid?
Solution – Finding more information about a Requisition

Log on to the System
− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Find more information about a requisition

1. Navigate to the iProcurement homepage and display the full list of requisitions you created today.
   - (N) iProcurement homepage.
   - (T) Requisitions.
   - (B) Search.
   - (B) Clear.
   - Requisition Created = Any Time
   - Requisition Number = 2.
   - (B) Go.
   - (H) Requisition Number.
   - (I) Details.

Answer the following questions:

2. Who received this requisition? _________________________________________________

3. What is their phone number?   _________________________________________________

4. What invoice number relates to this requisition? ___________________________________

5. When was the invoice paid? ___________________________________________________

6. (B) Ok.

7. (H) Return.

Find out more about another requisition

8. (B) Clear.


10. (B) Go.
11. (H) Requisition Number.
12. (I) Details.

**Answer the following questions:**

13. The invoice relating to this requisition is on hold, why? __________________________

14. Which supplier was this requisition raised to? _________________________________

15. What is the purchase order that was created from this requisition? ________________

16. When was the invoice due to be paid? _________________________________________

17. (B) Ok.

18. (H) Return.
**Agenda**

**MANAGEMENT SERVICES CENTRE**

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- **Cancel a Requisition**
Cancel a Requisition

(N) /Procurement Homepage > (T) Requisitions > Select Requisition > (B) Cancel Requisition

When you cancel it, it still has an approval status of “Approved” (i.e. the approval status doesn’t change because you cancelled it), but you can’t “change” it anymore- this is how you know.

Note: You cannot cancel a requisition that has a status of Incomplete (but you can Copy it To Cart and delete the items if you no longer want it).

Note: Before a requisition is placed on a purchase order you can directly cancel the requisition, or any of it’s lines. After a requisition is placed on a purchase order you can only request that the lines be cancelled. The Buyer on the purchase order must accept the cancellation request before the lines on both the requisition and the purchase order will be cancelled. Once the cancellation has been accepted the Purchase Order will be communicated to the Supplier again.

To cancel a line:
• In the Requisitions tab, find and select your requisition.
• (B) Cancel Requisition.
• Select the line you want to cancel.
• Provide a reason.
• (B) Continue.
• (B) Submit.

If you make a change or cancellation before the requisition is placed on a purchase order, then the change or cancellation occurs immediately.

If you have requested a change or a cancellation to a requisition after it is placed on an approved purchase order, you can track the progress of the request. The requisition is placed in a Pending Change Request state until the request has been responded to by a buyer.

To track the change or cancellation:-
• In the Requisitions tab, locate or search for the requisition.
• (H) Status.
• (B) Change History.
Practice – Canceling a Requisition

Overview

In this practice, you will do the following:

- Cancel a requisition.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Cancel a requisition

Track the cancellation request

Please note the following:

- Requisition Number: ____________
- Purchase Order Number: ____________
- Receipt Number: ____________
Solution – Canceling a Requisition

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Cancel a requisition

1. Navigate to the iProcurement homepage and display the full list of requisitions you created today.
   - (N) iProcurement homepage.
   - (T) Requisitions.
2. (H) Requisition Number.
   **Note:** Pick a requisition that has an associated purchase order number.
3. (B) Cancel Requisition.
4. Select all the lines on the requisition.
   - Put a tick in the Select column for every line on the requisition.
5. Provide a reason as to why the line is being cancelled.
   **Note:** Make something up, but make it believable. E.g. “My budget has been cancelled”, “The Supplier rang and can’t supply this item”.
6. (B) Continue.
7. (B) Submit.
   **Note:** Because the requisition has an associated purchase order you will have to wait for the buyer to approve the change request before the lines will actually be cancelled.

Track the cancellation request

8. Navigate to the Requisitions tab.
   - (N) iProcurement homepage.
   - (T) Requisitions.
9. Locate the requisition number you requested to be cancelled.
10. (H) Status.
Summary

You should now be able to do the following:

- Raise a requisition using an external catalog
- Raise a requisition using a non-catalog request
- Copy an existing requisition
- Change an existing requisition
- Save a cart to come back to later
- Create a Personal Favorites shopping list
- Complete the Checkout process
- Check the status of Requisitions
- Cancel a Requisition
Oracle 11i - iProcurement: Receiving

Chapter 7
iProcurement Receiving
Objectives

After completing this module you should be able to do the following:

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Agenda

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Finding Items to Receive

(N) iProcurement Homepage > (T) Receiving

Note: Fields marked with a blue asterisk are mandatory and require a value.
Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

Recently ordered items will appear in the “Requisitions to Receive” section, or you can click the (B) Full List to see all the requisitions you have raised in the system. Alternatively, you can use the search facility at the top of the screen.

The Search facility allows you to search for:-
- Items to Receive
- Items to Return
- Receipts to Correct
- Receipts to View
and you can search by:
- Requisition Number
• Purchase Order Number
• Supplier

You can also find items to receive by clicking the Receive Items link in the Receiving section or over on the right in the Receiving Process section. Both of these links will take you to the same page (called Receive Items: Select Items). You can search on this page for:
• Requestor
• Requisition Number
• Supplier
• Order Number
• Shipment Number
• Items Due
Practice – Finding Items to Receive

Overview

In this practice, you will do the following:

- Find items that are able to be received.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Find items to receive
Solution – Finding Items to Receive

Log on to the System

− Username = ecutrnxXX
− Password = ecutrnxXX
− Responsibility = ECU Purchasing User

Find items to receive

1. Navigate to the iProcurement homepage and display the Receiving page.
   • (N) iProcurement homepage.
   • (T) Receiving.

2. Find one of the requisitions you created today by using the PO Number.
   • Select Find by Order Number using the pulldown on the middle field.
   • <enter search criteria>.
   • (B) Go.

3. Find all requisitions able to be received by using the Supplier Name.
   • Select Find by Supplier using the pulldown on the middle field.
   • <enter search criteria>.
   • (B) Go.

4. Find all requisitions created by you today that are ready for receipt.
   • (H) Receive Items.
   • (B) Go.
Agenda

- Find items to receive
- **Receive items**
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Receiving Items: Select Items (Step 1 of 3)

(N) iProcurement Homepage > (T) Receiving > (H) Receive Items

**Note:** Fields marked with a blue asterisk are mandatory and require a value.

**Note:** Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

The receiving process is broken down into three steps:

- Select Items
- Receipt Information
- Review & Submit

**Select Items:**

1. Tick the checkbox in the Select column to identify which items you want to receive.
2. Amend the Receipt Quantity if the defaulted value (of the quantity ordered) is not the quantity you want to receive.
3. (B) Next.

**Note:** at anytime you can cancel the receipt by clicking the Cancel button.
Note: You can receive all your outstanding items at once, but the system will create one receipt per supplier (i.e. you cannot receive more than one supplier on a receipt).
Receiving Items: Receipt Information (2 of 3)

(N) iProcurement Homepage > (T) Receiving > (H) Receive Items > (B) Next

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

Receipt Information:-

1. The Receipt Date is defaulted to the current date and time. It is acceptable to leave this as per the default, however, it can be changed to reflect a different receipt date.

2. ECU does not use the Waybill or Packing Slip functionality, so these fields are not required.

3. (Optional) enter a Receipt Comment.

4. If the information you have just entered applies to all items you are receiving at this time, make sure ‘Yes’ is selected, otherwise select ‘No’ and enter item-specific receipt information.

5. (B) Next.

Note: at anytime you can cancel the receipt by clicking the Cancel button.
Receiving Items: Review & Submit (Step 3 of 3)

(N) iProcurement Homepage > (T) Receiving > (H) Receive Items > (B) Next

Note: Fields marked with a blue asterisk are mandatory and require a value.
Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

Review & Submit:
1. Check over the Received Item details to confirm that they are correct.
2. If the details are not correct, click the Back button to return to the Receipt Information screen (and again if you need to return to the Select Items screen).
3. If the details are correct, click the Submit button to complete the receiving process.
   Note: at anytime you can cancel the receipt by clicking the Cancel button.
4. Take note of the Receipt Number for your records.
Practice – Receiving Items

Overview

In this practice, you will do the following:

- Receive all the items that you requested during this training session.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Receive items
Solution – Receiving Items

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Receive items
1. Navigate to the iProcurement homepage and display the Receiving page.
   - (N) iProcurement homepage.
   - (T) Receiving.
2. Use one of the methods you just practiced to find your requisitions.
3. Select 10 items to receive.
4. (B) Next.
5. Optionally, update the Receipt Date to reflect another date and / or time.
6. Optionally include a Receipt Comment.
   **Note:** you can record different information again each item that you are receiving.
7. (B) Next.
8. (B) Submit.
9. Go back to the practice/s where you created the requisition/s you just received and record the receipt number/s you just created.

Receive the rest of the items you have requested today, that are ready for receipt.
10. (H) Return to Receiving.
11. (H) Receive Items.
12. (H) Select All.
13. (B) Next.
14. Optionally, update the Receipt Date to reflect another date and / or time.
15. Optionally include a Receipt Comment.
   **Note:** you can record different information again each item that you are receiving.
16. (B) Next.
17. (B) Submit.

18. Go back to the practice/s where you created the requisition/s you just received and record the receipt number/s you just created.

19. Go back to the practice/s where you created the requisition/s you just received and record the receipt number/s you just created.
Find items to receive
Receive items
**Return items**
Correct receipts
View receipts
Understand the importance of receiving
Returning Items: Find Receipt (Step 1 of 3)

(N) iProcurement Homepage > (T) Receiving > (H) Return Items

**Note:** Fields marked with a blue asterisk are mandatory and require a value.
**Note:** Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

**Note:** Returning items in the iProcurement system does *NOT* advise the Supplier. You will still need to contact the Supplier to organise for the item/s to be picked up. You will also need to discuss with your Supplier if you want replacement items to be delivered, or if you want a credit note issued.

- If you request replacement items then you will need to re-receive the items in the iProcurement system when you physically receive them again.
- If you request a credit note you will need to track the progress (refer to Chapter Raising Requisitions - Finding more information about a Requisition) to determine when the credit note has been matched to the requisition line for that item so that you can contact the MSC Systems team to request that the order line be closed.)
The returning process is broken down into three steps:-

- Find Receipt
- Return Information
- Review & Submit

Find Receipt:-

1. Enter appropriate search criteria to find the specific receipt relating to the item(s) you want to return:
   
   - Receipt Created By: enter the name of the person who created the receipt.
   - Items Received: use the pulldown to select the time period of the receipt. Valid options are:
     - Last 7 Days,
     - Last 30 Days,
     - Last 60 Days,
     - Anytime.
   - Receipt: enter the receipt number.
   - Requisition Number: enter the requisition number.
   - Order Number: enter the purchase order number.
   - Supplier: enter the name of the supplier.

2. (B) Go to execute the search or (B) Clear to clear the criteria.

3. Review the list of records returned from executing your search.

4. If you can see the item that you want to return listed:
   - Enter the quantity you want to return in the Return Quantity field.
   - (B) Next

   **Note:** at anytime you can cancel the receipt by clicking the Cancel button.

If you cannot see the item that you want to return listed:-

1. Execute a new search by repeating steps 1 – 2 above.
Returning Items: Return Information (Step 2 of 3)

1. Optionally select a reason by using the Search and Select screen. Valid options are:
   - Damaged on Arrival
   - Faulty
   - No Longer Required
   - Wrong Item

2. ECU doesn’t use the Return Material Authorization field so no entry is required in that field.

3. Optionally include a comment.

4. (B) Next.

Note: at anytime you can cancel the receipt by clicking the Cancel button.
Returning Items: Review & Submit (Step 3 of 3)

Review & Submit:

1. Check over the Return Item details to confirm that they are correct.
2. If the details are not correct, click the Back button to return to the Return Information screen (and again if you need to return to the Find Receipts screen).
   Note: at anytime you can cancel the return by clicking the Cancel button.
3. If the details are correct, click the Submit button to complete the Return process.

Note: Fields marked with a blue asterisk are mandatory and require a value.
Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.
Practice – Returning Items

Overview

In this practice, you will do the following:

- Return some of the items that you just received.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Return items
Solution – Returning Items

Log on to the System

− Username = ecutrnXX
− Password = ecutrnXX
− Responsibility = ECU Purchasing User

Return items

1. Navigate to the iProcurement homepage and display the Receiving page.
   - (N) iProcurement homepage.
   - (T) Receiving.

2. Find one of the receipts you created in the last practice and return some of the items you ordered.
   - (H) Return Items.
   - Enter search criteria or scroll through the list to find some items to return.
   - Type in the quantity that you want to return on each line in the Return Quantity column.
   - (B) Next.
   - Select a Reason why you are returning the items.
   - If you can’t find an appropriate reason, type in your reason in the Comments field.
   - (B) Next.
   - Review your return details.
   - (B) Submit.
Agenda

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Correcting Receipts

(N) iProcurement > (T) Receiving > (H) Correct Receipts

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are find alternate values.

Select Receipts:
1. Enter appropriate search criteria to find the specific receipt relating to the item/s you want to return:
   • Receipt Created By: enter the name of the person who created the receipt.
   • Items Received: use the pulldown to select the time period of the receipt. Valid options are:
     - Last 7 Days,
     - Last 30 Days,
     - Last 60 Days,
     - Anytime.
   • Receipt: enter the receipt number.
• **Requisition Number**: enter the requisition number.
• **Order Number**: enter the purchase order number.
• **Supplier**: enter the name of the supplier.

2. (B) Go to execute the search or (B) Clear to clear the criteria.
3. Review the list of records returned from executing your search.

**If you can see the item that you want to correct listed**:-
• Enter the correct quantity in the Correct Quantity field.
• (B) Continue.
• (B) Submit.
  
  **Note**: at anytime you can cancel the correction by clicking the Cancel button.

**If you cannot see the item that you want to correct listed**:-
• Execute a new search by repeating steps 1 – 2 above.
Practice – Correcting Receipts

Overview

In this practice, you will do the following:

- Correct some of the receipts you created in the practice called “Receiving Items”.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Correct receipts
Solution – Correcting Receipts

Log on to the System

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

Correct receipts

1. Navigate to the iProcurement homepage and display the Receiving page.
   - (N) iProcurement homepage.
   - (T) Receiving.

2. Find one of the receipts you created in the last practice and correct the quantity for some of the items you ordered.
   - (H) Correct Receipts.
   - Enter search criteria or scroll through the list to find some items to return.
   - Type in the quantity that you want to correct on each line in the Correct Quantity column.
   - (B) Continue.
   - Review your correction details.
   - (B) Submit.
Agenda

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Viewing Receipts

(N) iProcurement Homepage > (T) Receiving > (H) View Receipts

Note: Fields marked with a blue asterisk are mandatory and require a value.

Note: Remember that the torch icon at the end of a field will take you to a Search and Select screen when you are finding alternate values.

Recently received items will appear in the “My Requisitions at a Glance” section, or you can click the Full List button to see all the requisitions you have received in the system.

View Receipts:
1. Enter appropriate search criteria to find the specific receipt relating to the item/s you want to return:
   - **Receipt Created By:** enter the name of the person who created the receipt.
   - **Items Received:** use the pulldown to select the time period of the receipt. Valid options are:
     - Last 7 Days,
     - Last 30 Days,
- Last 60 Days,
- Anytime.

- **Receipt**: enter the receipt number.
- **Requisition Number**: enter the requisition number.
- **Order Number**: enter the purchase order number.
- **Supplier**: enter the name of the supplier.

2. (B) Go to execute the search or (B) Clear to clear the criteria.
3. Review the list of records returned from executing your search.

**If you can see the receipt you want to view listed:-**
- Enter the correct quantity in the Correct Quantity field.
- (H) Receipt Number – view information specific to the receipt (eg the data, time and receiver).

  **Note**: you can also correct the receipt or return items from this screen.

  **Note**: at anytime you can cancel the correction by clicking the Cancel button.

**If you cannot see the receipt you want to view listed:-**
- Execute a new search by repeating steps 1 – 2 above.
Practice – Viewing Receipts

Overview

In this practice, you will do the following:

- View the receipts you created today.

Assumptions

- You must have access to the Training database on which to complete this practice.
- Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

View receipts

Answer the following questions:

3. How many receipts did you create today? ____________________________

4. Which requisitions have adjusted receipt quantities? _____________________

5. How do you find out if the Received Quantity has been corrected, or if the item was returned to the Supplier? ____________________________
   ____________________________________________________________________
Solution – Viewing Receipts

Log on to the System
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU Purchasing User

View receipts

1. Navigate to the iProcurement homepage and display the Receiving page.
   - (N) iProcurement homepage.
   - (T) Receiving.

2. View all the receipts you have created today.
   - (H) View Receipts.

Answer the following questions:

3. How many receipts did you create today? ________________________________

4. Which requisitions have adjusted receipt quantities? _________________________

5. How do you find out if the Received Quantity has been corrected, or if the item was returned to the Supplier? ________________________________
Agenda

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- **Understand the importance of receiving**
The importance of Receiving - Commitments

What is a User Commitment?
What is a GL / Financial Commitment?

Receiving - Commitments

User Commitment
- where a requisition is approved and a purchase order created and sent but it has not been received in the system. All open (i.e. not cancelled and closed orders) purchase orders not received in the system will be included in the committed funds figure regardless if they are invoiced or not. This is another column in the same standard financial reports but only the reports in COGNOS are able to pull them in.

GL / Financial Commitment
- where a purchase order is received in the system but not invoiced. This is included in the actual column of your standard monthly financial reports - it represents an accrual (committed expense as ECU have taken hold of the goods and services) raised at month end and reversed in the next month. This action will keep on happening until the relevant invoice is matched to the purchase order and receipt already in the system.
The importance of Receiving

Why should I receive?

- If items are not received, it can clutter up your reports (accruals).
- It can appear as if you have paid for items twice (i.e. actual payment of unmatched invoice and accrual of unmatched, but receipted purchase order).

• If you don’t receive your items they will appear on your reports, and the accrual process will begin (accrual raised at month end, and reversed out at the start of the following month).
• In the instance where items are ordered and received but the invoice is not matched to the order, your reports will show as if you have paid twice when the accrual on the unmatched purchase order gets raised. To avoid this we encourage you to receive your items, and suppliers to quote the appropriate purchase order number on their invoices.
You should now be able to do the following:

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Where to from here

• Enrol in your next training course:-
  – eApprovers
  – eJournals
  – iProcurement
  – iAssets
  – Oracle 11i Reporting
  – AR Invoices

• Systems Support from the 10th January 2006
  – Call: 2772
  – Email: mscsystems@ecu.edu.au
Users who are regular purchasers of Assets, including equipment, need to enrol in the iAssets training module.

The customised receiving process will be demonstrated in this session.