Quick Reference

Creating a Blanket Order

Responsibility: ANY end user responsibility beginning with “ECU Purchasing”

1. (N) iProcurement Homepage.
2. Click on the Non-Catalog Request link on the Shop tab.
3. Change the Item Type to “Goods or services billed by amount” by clicking on the down arrow at the end of the Item Type field.
4. Enter the Item Description to describe the goods / service you are requesting. Make sure to indicate that this order is covering a period of time.
5. Select the purchasing Category by typing in a value surrounded by the % wildcard.
6. Enter the blanket Amount you want to request be committed to the Supplier for the purpose outlined in the Item Description field.

! IMPORTANT !
This should be the ex-GST amount as all requisitions are raised without GST.

7. The Currency defaults to AUD but you can use the down arrow at the end of the field to change it.
8. Enter the Supplier Name (make use of the % wildcard).
9. If the search criteria you entered in the Supplier Name field matched only one supplier in the system then the Site field should already be completed for you (and the Contact Name and Phone fields also, if there are values stored in them). If so, go to step 10; otherwise scroll through the Search and Select list of values and click the Quick Select icon for the Supplier and Site you want.

10 Click the Add to Cart button back on the original page. When you Add items to Cart they should then appear in your Shopping Cart.
11 If you want to add more lines to this requisition, change the Item Description, Category, and Amount to reflect the new item.

! IMPORTANT !
Remember to change at least the Item Description, because if you don’t the system will look at the lines and group lines with the exact same description.
Remember to add each individual item to cart before moving on to the next one.

12 When you have added all the lines that you want click the View Cart and Checkout button.
13 Click the Checkout button to progress to the ‘Checkout: Requisition Information’ screen.
14 The Requisition Description defaults the value from the first requisition line Item Description. Change it to be more meaningful.

! IMPORTANT !
If you need to change / split the default expense account, please see Changing / Splitting Charge Accounts [PO-041]. If you need to change the deliver-to location, please see Changing the Delivery Address [PO-044].

15 Click the Next button to progress to the ‘Checkout: Review Approver List’ screen.
16 Confirm that the Approver Name is correct. If it isn’t see Changing the First Approver [PO-043].
17 If you need to add another approver, see Adding Another Approver [PO-042].

! IMPORTANT !
Pelham, Stephen is the top of the purchasing approval hierarchy. If he is listed as your approver, then there is a problem – no-one between you and the top of the tree can approve for the dollar amount and the flexfield(s) you have quoted on your requisition. If this is the case, save your requisition by clicking the Save button and investigate. See Retrieving a Shopping Cart [PO-034] when you are ready to complete your requisition.

18 If you need to add an attachment to the approver, please see Adding an Attachment to the Approver [PO-045].
19 Click the Next button to progress to the ‘Checkout: Review and Submit Requisition’ screen.
20 Check over the details of the requisition to make sure you are 100% happy with them. To see charge account details, click the Show Details link.
21 If you are not completely satisfied with the requisition, click the Back button to make other checkout changes.
22 If you are completely happy with the requisition, click the Submit button.
23 Take note of the Requisition Number in case you need to query it with the Approver, or the Systems team.