iProcurement - Non-Catalog Requests

Student Guide
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Oracle 11i - Abbreviations

Common Abbreviations

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

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
Objectives

After completing this module you should be able to:

• Understand how the Purchasing Policy affects purchases made through iProcurement
• Identify who is responsible for performing functions within the purchasing process
• Understand Key Functionality of iProcurement
• Understand how the purchasing hierarchy affects the approval process
• Request a New Vendor
• Request a Purchasing Account
Purchasing Policy

FINANCE AND BUSINESS SERVICES CENTRE

- 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.

The Procurement Procedures Manual is located at
Key Areas of Responsibility

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

Approvers
- Approving/rejecting requisitions.

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

Shared Services
- Entering invoices.
- Raising payments.
Key Functionality of Oracle iProcurement

**Shopping**
Process where users search for, compare, and select items that they need to purchase. This allows users to punch out (go to another supplier site) to supplier-hosted catalogues or browse internally-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 create a receipt and specify information about the delivery of their order.
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 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 on 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 with 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.
Request a New Vendor

The New Vendor Request form can be found at:

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

1. Navigate to the Finance & Business Services Centre Online Forms webpage and click on the New Vendor Request Form link under the iProcurement / Purchasing Forms header (http://www.ecu.edu.au/fbsc/fser/frm/form11.html).
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 (this is not a compulsory 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. Enter the vendor’s account number in the Account Number field.
25. If the vendor is an international vendor, tick checkbox and complete the International Vendor Bank Details section.

International Vendor Bank Details
26. Enter the vendor’s bank address line 1 in the Address 1 field.
27. Enter the vendor’s bank address line 2 in the Address 2 field.
28. Enter the city that the vendor’s bank is located in the City field.
29. Enter the state that the vendor’s bank is located in the State field.
30. Enter the zipcode that the vendor’s bank is located in the Zip field.
31. Enter the country that the vendor’s bank is located in the Country field.
32. If you only intend to use this vendor just this once, please check the box to indicate this.
33. If you have any additional comments that will assist the setting up of this new vendor, please use the Additional Comments field.
34. 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.

Note: If the Supplier you’re 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.
Request a Purchasing Account

The Oracle Applications Account Request form can be found at:-

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

1. Navigate to the Finance & Business Services Centre Online Forms webpage and click on the Oracle Applications Account Request Form link under the Account Applications Forms Header.
2. Enter the name of the account requestor in the Name field.
3. Enter the account requestor’s phone number in the Phone field.
4. Enter the account requestor’s email address in the Email field.
5. Select the Faculty / Centre that the account requestor belongs to in the Faculty / Centre field.
6. Enter the School / Branch that the account requestor belongs to in the School / Branch field.
7. Enter the account requestor’s ADS Username in the ADS Username field.
8. Select the Access Requirements needed by clicking in the checkboxes and radio buttons. If one of the Purchasing buttons is checked the form will default to the Purchasing section.
9. Enter the title of the account requestor’s position in the Position field.

10. Enter the person that the account requestor reports to (i.e. who will need to approve their requisitions) in the Requisition Approver field. Please note, this person must hold an iProcurement approval limit above the account requestor’s requested limit.

11. Enter the Approval limit that the account requestor is allowed in the Approval Limit field (if you are unsure refer to the Financial Delegations Manual).

12. Select the Delivery Location Campus from the pulldown list.

13. Enter the Building and Room Numbers where the account requestor will want the majority of their purchases delivered in the Building and Room fields.

14. 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).

15. Enter the Projects and Cost Centres that are within the account requestor’s approval.

16. Indicate if this account application is for a new position at the University, or if the account requestor is replacing someone who has left an existing position.

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

18. Please indicate if the person the account requestor is replacing has left the University.

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

20. 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.
Summary

You should now be able to:

- Understand how the Purchasing Policy affects purchases made through iProcurement
- Understand Key functionality of 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
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
- Reassign your notifications (Vacation Rule)
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
1. **Stores:** this is where you can link to any external catalogs that have been set up (i.e. Corporate Express Australia) and any internal catalogues or 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 than are displayed, 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 eBusiness Suite home page.

10. **Logout**: clicking this link will log you out of the Oracle Financials Applications.
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 can then copy the requisition to a new cart, make changes and submit.

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

(N) iProcurement Homepage > My Notifications
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 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 notifications you have received.
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 the approver has put any comments (eg. 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.
Viewing Notifications

Once you have responded to a notification, the system will return you to your list of open notifications.

From here you can choose to action all your open notifications, view additional notifications or sort or customise your notifications.

To action all Open Notifications:
1. (H) Select All
2. (B) Open. This will open each of your Open Notifications in turn so you can submit the appropriate action. This may just be clicking the (B) Ok to close the notification.

To return to the iProcurement homepage, click on the (T) Shop.
You can reassign your notifications so they can be actioned while you are on leave. This is very handy for staff who approve requisitions for others.

To put a vacation rule in place, click on the (H) Vacation Rule at the bottom of your notifications on the iProcurement homepage.
Notifications – Reassigning (Vacation Rule)

1. (N) iProcurement Homepage > My Notifications.
2. (H) Vacation Rules.
3. (B) Create Rule.
4. Select the type (the name of the notification/s that you want to create the rule for).
   Note: By selecting the item type ‘ALL’ you can create one rule for all your notifications (purchasing, GL journals, iAssets etc).
5. (B) Next.
Notifications – Reassigning (Vacation Rule)

1. Use the calendar icon to enter the Start Date for this rule (in 24 hour format).
2. Optionally use the calendar to enter an End Date for this rule.
3. Optionally enter a message for the person who will be receiving your notifications.
4. Use the torch icon to select the employee who will be receiving your notifications. Please note, they must have a current Oracle purchasing account.
5. Decide whether to Delegate your Response or Transfer Ownership of the Notifications.
6. Apply.

Definition of Delegate or Transfer:

Delegate your Response: Select this option if you want the give the user authority to respond to the notification on your behalf, but you want to retain ownership of the notification. For example, they can approve on your behalf, but the audit trail will show that you approved it.

Note: By using the delegation option, the person will inherit your approval limits, so this option can only be used if the delegate has equal or higher approval limits.
**Transfer Ownership:** Select this option if you want the person to have complete ownership of the notification. For example, the audit trail will show that person as the approver. Approval limits are not inherited so if you select this option approvals will be based on the approval limits of the person to whom it is transferred.

Once the rule is applied, it will show on your screen under the vacation rules. Dependant upon the start and end dates entered, the rule may be active or inactive. You can also delete or edit the rule from the vacation rules screen.
Using Search and Select to find field values

Throughout iProcurement you will see a torch icon at the end of some fields. The torch icon means you can open a search window which will allow you to search for the value you need. You can also use the % wildcard at the beginning and end of your search criteria to broaden your search.

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 an account code for consumables, try putting "%consum%" in the Find field. This will return anything that has “consum” anywhere within the string.

3. (B) Go.
4. Click the icon in the Quick Select column on the row that shows the 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.
General Preferences

(N) iProcurement Homepage > (H) Preferences

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.
• Change Password > Change Password: force a change of your password if required.
• 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 ‘ECU Purchasing User’ 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.
Preferences are used to automatically fill in specific information on various checkout pages. Preferences expedite shopping and save time.

To use these preference 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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

1. Complete the Requestor field and check the delivery address.
2. Create a Favourite Charge Account and set it as Primary.
3. Create another Favourite Charge Account.
Solution – Creating a Favourite Charge Account

Log on to the System

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

Navigate to the iProcurement homepage and open the iProcurement Preferences page.

• (N) iProcurement homepage > (H) Preferences.
• (H) iProcurement Preferences.

Set the Requestor name and check delivery details.

1. Set the requestor name and check the delivery address.

• Use the (I) Torch to search for the user name that you logged on with eg trainXX.
• In the Search field, type Trainee%
• (B) Go
• Scroll through the list to find your logon name, remember there may be more that one page of names returned.
• Either use the Quick Select or the Select radio button and (B) Select to return your user name. Check the delivery address field now has a value.

Create a Favourite Charge Account and set it as Primary

2. Create a favorite charge account.

• (B) Add Another Row.
• Nickname = FBSC Toner Cartridges
• ECU Accounting Flexfield = 68000.2430.4004.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. Create a favorite charge account.

• (B) Add Another Row.
• Nickname = Prof Development Software
• ECU Accounting Flexfield = 69600.2515.6008.SA.04.01.

• (B) Apply changes

You will receive a confirmation message at the top of the screen. To action these changes, log out of the system and back in using the same logon details.

The favourite charge accounts you have just created will be used later when completing the checkout process.
Summary

You should now be able to:

- Find things on the iProcurement Homepage
- Check and respond to your notifications
- Reassign your notifications (Vacation Rule)
- Access the General Preferences menu
- Access the iProcurement Preferences menu
- Use Search and Select to find field values
iProcurement - Overview of Raising Requisitions

Chapter 3
Raising Requisitions Overview

There are three different methods of raising requisitions using iProcurement:

1. External catalogs
2. Internal catalogs (Categories)
3. Non-catalog requests. With non-catalogs you can raise requisitions using the Non-Catalog Request hyperlink or use the Store templates.

1. External Catalogs:-
   External catalogs can be found under the Stores listing on your iProcurement shop page. Using the link under Stores, or the search tool to search for items sold by a supplier with an external catalog will take you from iProcurement to an external website hosted by the supplier. You can then select the items you want to purchase and return them to iProcurement to complete the checkout process.

2. Internal Catalogs (Categories):-
   Internal Catalogs are catalogs from suppliers that are hosted internally by ECU. They are found under the Categories hyperlink. You can search the catalogs for items or use the hyperlinks to drill down to the items you want. All the information for that item including prices are defaulted, all you need to enter is the quantity and add to order.
3a. Non-Catalog Requests:-
With non-catalog requests you manually enter all the information about the item and choose
the supplier, site and contact details. You can use the non-catalog request hyperlink to raise a
requisition for more than one supplier. Non-catalog requests are also used for foreign
currency requisitions.

3b. Non-Catalog request templates:-
The listings under Stores include external catalogs, but also include non-catalog request
templates that have been set up with our preferred suppliers. These templates request
additional information that is needed by our suppliers to complete the order. They save time
raising requisitions and ensure the supplier has all information required for your order.
iProcurement - Raising Non-Catalog Requests

Chapter 4
iProcurement Raising Non-catalog Requests
Objectives

After completing this module you should be able to:

- Raise a requisition using a non-catalog request
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 where you can find alternate values.

**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. 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 requesting 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 (not to be used when purchasing assets).

4. **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.

5. **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.

6. **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.

7. **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.

8. **Unit Price** = Enter the unit price that the Supplier quoted you for this item.
   **Note:** The price entered must be the GST exclusive price.

9. **Currency** = AUD (default, 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
   **Note:** If you select a currency other than AUD, the supplier and site must accept that currency and the goods must be invoiced in that currency. Run a supplier query in Oracle core applications to check before raising your order.

10. **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.
    **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).

11. **Site** = The supplier site you want the resulting purchase order to be communicated to.

12. **Contact Name** = If you know the name of a contact at the supplier that you want to reference on the resulting purchase order.

13. **Phone** = if you know the phone number of a contact at the supplier that you want to reference on the resulting purchase order.

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

15. **(B) Add to Cart.**

If you want to request more than one item:

16. Repeat steps 3-15.
Once you have requested all the items you need from this Supplier:-
18. Shopping Cart > (B) View Cart and Checkout.
19. (B) Checkout.
20. Complete the Checkout Process
21. (B) Submit.
Practice - Raise 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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Create a requisition using a non-catalog request

1. Raise a requisition to WA Toner Supplies in Osborne Park for 2 toner cartridges for a Sharp Printer at $75.00 each. Use the category ‘Printing and Photocopying.Printing Materials Excluding Paper’.

2. Add a second line on the requisition for 5 toner cartridges for a Canon Printer at $60.00 each.

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________
Solution – Raise a Requisition using a Non-Catalog Request

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

Create a 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. Use the torch to select the supplier.

3. Complete the required fields.

4. (B) Add to Cart.

5. Repeat step 3 until you have two lines in your shopping cart.

Complete the checkout process to submit the requisition

6. (B) View Cart and Checkout.

7. (B) Next.

8. (B) Next.

9. (B) Submit.

Please note the following:

   Requisition Number: ____________
Summary

After completing this module you should be able to:

- Raise a requisition using a non-catalog request
iProcurement Complete the Checkout Process
Objectives

After completing this module you should be able to:

- Complete the Checkout Process
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.01.2101

**Tax:-**
- Taxable = Is this requisition subject to tax (GST)? This is defaulted to 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.
- FREE-GST – University purchases where Suppliers will not 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).

If you need to check or change charge accounts, tax or delivery information for individual lines:-
- (B) Edit Lines.

**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 does not submit, there is a problem with one of the requisition lines and this must be resolved before it can be submitted.

If you are happy with the defaulted information against the requisitions lines and want to proceed to the next step:-
- (B) Next.

If you are happy with all requisition line information and the default approver and want to submit for approval:-
- (B) Submit.

If you want to cancel out of the Checkout process and return to viewing your Shopping cart:-
- (B) Cancel.

If you want to save the requisition and take it through the Checkout process later:-
- (B) Save
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 where you can find alternate values.

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

- Edit the default charge 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 required.
- 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 or tax) 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. **Please note:** this is not applicable for Corporate Express requisitions as they will only deliver to the delivery address nominated on the ‘Checkout: Requisition Information’ screen.

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) Tax – change the tax code, 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 Tax

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

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.

On the Tax tab you can:-
• Change the Tax Code 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) 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 Accounts

(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 where you can find alternate values.

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

- Change the Charge Account for each individual line.
- Split the payment across multiple charge accounts.

**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 enter the ECU Flexfield Accounting field).
- If you didn’t create a favourite charge account you can type in the full flexfield combination (Project.CostCentre.Account.Activity.Location.Company) you want charge each individual line to, or use the torch icon to search for your flexfield.
If you want to apply the change to all requisition lines:-
   • Put a tick in the box on the bottom left of screen before the line that reads ‘Apply this Cost Allocation information to all applicable requisition lines’.
   • (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 to 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 update 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) Tax – 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 – Accounts (Split)

<table>
<thead>
<tr>
<th>Line Description</th>
<th>Unit</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount (AUD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Toner for Canon Printer</td>
<td>each</td>
<td>5</td>
<td>70.00</td>
<td>350.00</td>
</tr>
</tbody>
</table>

### Charge Accounts

<table>
<thead>
<tr>
<th>Line</th>
<th>ECU Flexfield Accounting</th>
<th>Percent</th>
<th>Quantity</th>
<th>Account (AUD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project.Cost Centre.Account.Activity.Location.Company</td>
<td>50</td>
<td>2.4</td>
<td>176.00</td>
</tr>
<tr>
<td>2</td>
<td>Project.Cost Centre.Account.Activity.Location.Company</td>
<td>50</td>
<td>2.5</td>
<td>175.00</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>100</td>
<td>5</td>
<td>350.00</td>
</tr>
</tbody>
</table>

Note: Total allocation must equal 100% of the selected line values.
- Apply this Cost Allocation information to all applicable requisition lines.

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 to 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 update 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.
Complete the Checkout process Edit Lines – Accounts (Split)

Edit Lines – Splitting the Charge Account

Once you return to the Edit Lines page after splitting the charge account, you will notice the Charge account for that line is listed as ‘Multiple’.
Complete the Checkout process: Edit Lines Attachments

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

On the Attachments tab you can:-

- Add attachments to the requisition.
- Add attachments to the individual requisition 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 where you can find 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.

If you want to add an attachment to the requisition:-

1. Requisition Attachments > (B) Add Attachments.
2. Enter a Description of the attachment.
3. Select a Category.
   **Note:** Valid categories to select from are:
   - Internal to Requisition
   - To Approver
   - To Receiver
   In most instances you will want to attach something to the Approver or internal to the requisition. **Note:** Attachments to Suppliers is not currently available. Attachments to Approver, Internal to Requisition, and To Receiver are the best ones to use.

4. Select the Type of Attachment.
   **Note:** Valid Attachment Types to select from are:
   - File
   - URL
   - Text

5. 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).

6. (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:-**
1. Requisition Line Attachments > (I) Attachments.
2. Repeat steps 1-6 for adding an attachment to a requisition.

**Note:** There is also the option to add an attachment in step 2 of the checkout process (Review Approver List).

**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) Tax – 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

If you want to add an attachment to the requisition:-

1. Requisition Attachments > (B) Add Attachments.
2. Enter a Description of the attachment.
3. Select a Category.
   Note: Valid categories to select from are:
   - Internal to Requisition
   - To Approver
   - To Receiver
   In most instances you will want to attach something to the Approver or internal to the requisition. Note: Attachments to Suppliers is not currently available. Attachments to Approver, Internal to Requisition, and To Receiver are the best ones to use.
4. Select the Type of Attachment.
   Note: Valid Attachment Types to select from are:
   - File
   - URL
   - Text
5. 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).

6. (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:-
1. Requisition Line Attachments > (I) Attachments.
2. Repeat steps 1-6 for adding an attachment to a requisition.

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) Tax – 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

Once you have finished editing your lines

1. (B) Return will take you back to the Checkout: Requisition Information screen above.
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 where you can 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 total dollar value of the requisition (including tax).
To Change the First Approver:–
• (B) Change First Approver.
• Type in the New First Approver’s Name. Note: All staff are listed in the forms as Surname, First name.
• (B) Apply.

To Add an Approver:–
• (B) Add Approver.
• Type in the Approver’s Name you want to add (format = Surname, 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.
• (B) Add Approver.

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.fbsc.ecu.edu.au/sp/html/ecu_preferred_suppliers.cfm 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 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 Requisition (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 where you can find 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

Complete the Checkout process
Printable Page

FINANCE AND BUSINESS SERVICES CENTRE

Oracle iProcurement

Checkout: Review and Submit Requisition

Requisition 56848: Total $20.00 AUD

<table>
<thead>
<tr>
<th>Description</th>
<th>Unit</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Toner for Sharp Printer, 6004, each</td>
<td></td>
<td>2</td>
<td>60.00 AUD</td>
</tr>
<tr>
<td>Estimated Tax</td>
<td></td>
<td></td>
<td>5.00</td>
</tr>
<tr>
<td>Approval Total</td>
<td></td>
<td></td>
<td>520.00</td>
</tr>
<tr>
<td>GST (10%)</td>
<td></td>
<td>17.00</td>
<td>11.90</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>520.00</td>
</tr>
</tbody>
</table>

Billing Information:
- Charge Account: 02000.0364.4004.5A-01-01
- Supplier: WA TONER SUPPLIES
- Supplier Contact: OSBORNE PARK
- Supplier ID: ML.01.01.9
- Supplier Phone: 08-6131 7728
- Supplier Email: info@watonersupplies.com.au
- Supplier Zero Rating: No
- Supplier GST: 17.00%
- Supplier Rate: 17.00%
- Supplier Address: 2300 Piccadilly St, Osborne Park, WA 6017

Complete the Checkout process: Printable Page
Practice - Complete the Checkout Process

Overview

In this practice, you will do the following:

- Make multiple changes to one requisition during the checkout process.

Assumptions

- You must have access to the Training database 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Make multiple changes during the checkout process

- Copy your most recent requisition by using the Copy icon on the list of most recent requisitions.
- (B) Checkout to take the requisition through the checkout process.

1. Change the Need-By date to five days from today
2. Change one of your lines to the Tax code FREE-GST
3. Change the charge account of the first requisition line to the FBSC Toner Cartridges favourite charge account created earlier
4. Split the cost 50/50 for the second line between the default and one of your favourite charge accounts.
5. Change First Approver to Trainer, Top (after the change has been made, use the Reset Approval List to change back to the default approver).
6. Add an attachment to the entire requisition. Choose a document from the Desktop.
7. Review requisition and view printable page

Submit Requisition for approval

Please note the following:

- Requisition Number: ___________
Solution – Complete the Checkout Process

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

Make multiple changes during the checkout process

• Copy your most recent requisition by using the Copy icon on the list of most recent requisitions.

• (B) Checkout to take the requisition through the checkout process.

1. Change the Need-By date to five days from now.
   
   Note: Navigate to the field titled ‘Need-By Date’ of the ‘Checkout: Requisition Information’ screen.

2. Change one of your lines to Tax code FREE-GST
   
   Note: (B) Edit Lines > (T) Tax. Click in field ‘Tax Code’ delete current value, use Torch to search for other values, select code FREE-GST. (B) Return to ‘Edit Lines’ screen.

4. Change the first requisition line to the ‘FBSC Toner Cartridges’ favourite charge account created earlier.
   
   Note: (T) Accounts > (H) Charge Account. Use the arrow for the Nicknames field and highlight one of the Nicknames. (B) Return

5. Split the cost 50/50 for the second line between the default and one of your favourite charge accounts.
   
   Note: (B) Edit Lines > (T) Accounts > (I) Split > (B) Add Another row. Use the arrow on the Nicknames field to select one of your favourite charge accounts. Enter 50 in the Percentage field for both lines. (B) Return to the ‘Edit Lines’ screen.

6. Change First Approver to Trainer, Top. Once changed, use the Reset Approval List to revert to the original approver. (Otherwise the trainer won’t be able to approve your requisition).
   
   Note: From ‘Checkout: Requisition Information’ screen (B) Next > (B) Change First Approver > (I) Torch. In search field type Trainer%Top% > (B) Go. Use Quick Select to choose Trainer, Top. Once back at ‘Checkout: Select Approver’ screen (B) Apply > (B) Reset Approval List.

7. Add an attachment to the entire requisition. Pick a document from the Desktop.
   
   Note: On the ‘Checkout: Select Approver’ screen (B) Add Attachments. Enter a description, choose the attachment type (B) Apply.
8. Review requisition and view printable page.

   *Note:* From the ‘Checkout: Select Approver’ screen, (B) Next > (H) Show (to show line detail) > (B) Printable Page. Please note, you cannot print from the training environment. Close Printable window.

9. (B) Submit.

Please note the following:

Requisition Number: ____________________________
Summary

After completing this module you should be able to:

- Complete the Checkout Process
iProcurement - Raising Non-Catalog Requests using a Template

Chapter 6
iProcurement Raising Non-Catalog Requisitions using a Template

iProcurement
Raising Non-Catalog Requisitions using a Template
Objectives

After completing this module you should be able to:

- Raise a non-catalog requisition using a template
Raising a Non-Catalog Requisition using a Template

(N) iProcurement Homepage > (T) Shop > Stores list > (H) Template name

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

**Note:** Depending on the template used, some fields may have defaulted values or not be showing on the screen. Other templates will have additional fields that must be completed.

**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.

**Hint:** To avoid delays, it is recommended that you ring the Supplier before raising the requisition to confirm the item description and unit price (in particular) are correct.

**To order items using a Non-Catalog template:-**

1. Navigate to the iProcurement homepage.
2. (T) Shop > Stores list > (H) Template name
3. Choose Request Type from drop down list
4. Item Type – this will default from template.
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 have the same Item Description, work out the best price and roll both lines 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). This may be defaulted, depending on the template used.

   **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, this may be defaulted depending on the template.

   **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.

   **Note:** The price entered must be the GST exclusive price.

10. **Currency** – this will default from template.

11. **Supplier Name** – this will default from the template

12. **Site** – this will default from template

13. **Phone** = this will default from template

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

15. Complete any additional fields that are shown on the template

16. (B) Add to Cart.

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

19. Repeat steps 3-18.

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

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

19. (B) Checkout.

20. Complete the Checkout Process

21. (B) Submit.
Practice - Raising a Requisition using a Template

Overview

In this practice, you will do the following:

- Raise and submit a non-catalog requisition using a template (for this exercise we will use ECU PC SOE Computers).

Assumptions

- You must have access to the Training database 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Create a non-catalog requisition using a template

Complete the checkout process to submit the requisition

Please note the following:

Requisition Number: ____________
Solution – Raising a Requisition using a Template

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

Create a non-catalog requisition using a template

1. Navigate to the iProcurement homepage.
   • (N) iProcurement homepage.
   • (T) Shop > Stores List > (H) ECU PC 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 fields that appear under the SOE PC Computer / Laptop heading. Complete the additional fields with your details.

Complete the checkout process to submit the requisition

3. (B) View Cart and Checkout.

4. Accept the checkout defaults.

5. (B) Submit.
Summary

After completing this module you should be able to:

- Raise a non-catalog requisition using a template
iProcurement Raising Requisitions using Internal Catalogs (Categories)
Objectives

After completing this module you should be able to:

• Raise a requisition using Internal Catalogs (categories)

• View the Compare feature of categories
Raising a Requisition using Internal Catalogs (Categories):-

(N) iProcurement Homepage > (T) Shop > (H) Categories

To order items using Categories:-
1. Navigate to the iProcurement homepage.
2. (T) Shop > (H) Categories.
3. Either use the search field at the top of the screen, or Browse hyperlinks to drill down to the category you want.
4. Enter the quantity you want to order in the Quantity field.
5. (B) Add to Cart.

If you want to request more than one item:-
6. Repeat steps 3-5.

Once you have requested all the items you need from this Supplier:-
7. Shopping Cart > (B) View Cart and Checkout.
8. (B) Checkout.
9. Complete the Checkout Process
10. (B) Submit.
Using Compare in Categories

Categories can also be used to compare products and prices from different suppliers. ECU currently only has one supplier under categories but as more are added, the compare function can be used to compare similar products between suppliers.

To compare products:-
1. Find the first item you want to compare.
2. (B) Add to Compare.
3. Find the other items you want to compare.
4. (B) Add to Compare.
5. When you have all items you want to compare listed under the Compare Items heading (B) Compare

iProcurement will list all known information about the selected items and show them side by side. You can also add to cart from this screen if you decide to order any of the items.

To exit Compare:-
1. Either (H) Return to return to Categories or,
2. (B) View Cart and Checkout if you are ready to proceed to checkout.
Practice - Raising a Requisition using Categories

Overview

In this practice, you will do the following:

• Raise and submit a requisition using Categories.

Assumptions

• You must have access to the Training database 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 = trainXX
– Password = trainXX
– Responsibility = ECU Purchasing User

Create a requisition using Categories

Complete the checkout process to submit the requisition

Please note the following:

    Requisition Number: ____________
Solution – Raising a Requisition using Categories

Log on to the System

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

Create a requisition using categories

1. Navigate to the iProcurement homepage.
   - (N) iProcurement homepage.
   - (T) Shop > (H) Categories.

2. Create two lines on the requisition. Choose two different Adobe products to add to your cart.
   
   Note: You can use the search field at the top, or browse through the catalogue. If you use the Browse feature (H) Software > (H) PC > Sort by Description in ascending order.

Complete the checkout process to submit the requisition

3. (B) View Cart and Checkout.

4. Change the charge account to the ‘Prof Development Software’ favourite charge account you created earlier. Apply this to all lines. Accept all other checkout defaults.

5. (B) Submit.

Please note the following:

Requisition Number: ____________
Summary

After completing this module you should be able to:

- Raise a requisition using Internal Catalogs (categories)
- View the Compare feature of categories
Copy a Cart
Objectives

After completing this module you should be able to:

- Copy a Cart
Copy a Cart

Copying an existing Requisition

(N) iProcurement Homepage > My Requisitions > (I) Copy > (B) Checkout

OR

(N) iProcurement Homepage > My Requisitions > (H) Requisition Number > (B) Copy to Cart > (B) Checkout

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.

Copy to cart is an exact replica of an existing requisition, including supplier, line and checkout information.

You cannot amend supplier information, line information or prices

You can amend quantity of items and checkout information.

Note: You cannot amend any information if you copy a requisition for Corporate Express.

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.
7. Complete the Checkout process

**You can also copy other’s requisitions by using the (B) Search on the Requisitions tab.**
Summary

After completing this module you should be able to:

- Copy a Cart
Save a Cart
Objectives

After completing this module you should be able to:

- Save a Cart
Save a Shopping Cart

(N) iProcurement Homepage > (H) Shopping Cart > (B) Save Cart

Saved carts appear in the Requisitions tab, with 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) iProcurement Homepage > 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,
add the new items to your existing cart. Remember you can only raise a requisition to one supplier at a time.

**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 submitted, thereby leaving the original requisition as incomplete so that you can copy or complete it again later.

**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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Copy your most recent requisition

Save the shopping cart

Please note the following:

- Requisition Number: ___________
Solution – Saving a Shopping Cart

Log on to the System

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

Create a shopping cart

1. Navigate to the iProcurement homepage and copy your most recent requisition to a new cart.
   • (N) iProcurement homepage.
   • My Requisitions > (I) Copy.

2. (B) Checkout.

3. (B) Save.

4. (B) New Cart

5. Note the requisition number from your list of most recent requisitions: _________________
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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Retrieve a shopping cart

Complete the Checkout process to submit the shopping cart

Please note the following:

Requisition Number: ________________
Solution – Retrieving a saved Shopping Cart

Log on to the System

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

Retrieve a saved shopping cart

1. Navigate to the iProcurement homepage.
   
   - (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 purpose of this exercise we will Copy to Cart.

3. Change the quantity ordered on each line.

Complete the checkout process to submit the requisition

4. (B) Checkout.

5. (B) Next.

6. (B) Next.

7. (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”.

Assumptions

- You must have access to the Training database 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Delete a saved (incomplete) shopping cart
Solution – Deleting a saved Shopping Cart

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

Create a shopping cart
1. Navigate to the iProcurement homepage.
   • (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.
After completing this module you should be able to:

- Save a Cart
iProcurement
Create a Favourite Shopping List
Objectives

After completing this module you should be able to:

- Create a Personal Favourites Shopping List
Create a Personal Favorites Shopping list

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:-

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

Simply completing a Non-Catalog, store template or internal 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.

Note: You can create personal favourites from different suppliers. Please note though when raising requisitions from your favourites list, only choose one supplier per requisition.
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.
Objectives

After completing this module you should be able to:

- Create a Personal Favourites Shopping List
iProcurement - View Requisitions

Chapter 10
View Requisitions

FINANCE AND BUSINESS SERVICES CENTRE

View Requisitions
Objectives

After completing this module you should be able to:

- Check the status of a requisition
- Search for a requisition
- Find additional information about a requisition
Check the status of a requisition
Check the status of a Requisition

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 > My Requisitions. You can also view all your requisitions from the Requisitions tab.

A requisition can be in any one of the following status at any one time:-

- **Incomplete** requisition is a saved cart, or a requisition that has been returned as no approver could be found.
- **Pre-Approved** requisition is approved, but forwarded to another approver.
- **Rejected** has been rejected by your approver.
- **Returned** is where the buyer has returned the requisition without creating a purchase order.
- **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 cancelled.

• **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 INCOMPLETE. You will receive an email notification advising you that no Approver was found for your requisition. You can elect to complete the requisition to submit again 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:** 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.

**Note:** Any requisition that has a blue dot next to it means that there is a cancellation pending. To see details of the cancellation, click on the status link.
Search for a requisition
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 Additional Information on a Requisition
Finding More Information about a Requisition

If you want to know additional information about a requisition, ie. whether an invoice has been received or paid, receipt details etc:-

- 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 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 = trainXX
– Password = trainXX
– Responsibility = ECU Purchasing User

Check the status of your requisitions

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

How many requisitions have been approved? ________________________________

How many requisitions are incomplete? ________________________________

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

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

Search for specific requisitions

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

1. What is the PO number of the first requisition you created today? ____________________
2. Who approved the first requisition you created today? _____________________________
3. What time did they approve it? ______________________________________________
4. Search for requisitions created by Smith, Tim, Any Time. Answer the following questions:
5. How many requisitions has he created? ________________________________
6. What is the PO# for requisition number 52508? ______________________________
7. What is the date of his oldest requisition? ________________________________
Solution – Searching for specific Requisitions

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

Search for specific requisitions
Navigate to the iProcurement homepage and display the full list of requisitions you created today.
• (N) iProcurement homepage.
• (T) Requisitions.

Enter search criteria to determine the answers to the following questions:
1. What is the PO number of the first requisition you created today? ________________
2. Who approved the first requisition you created today? _________________________
3. What time did they approve it? ____________________________________________
4. Search for requisitions created any time by Smith, Tim.
   • (N) iProcurement homepage.
   • (T) Requisitions.
   • (B) Search
   • Enter Smith, Timothy in the Created By field or use the torch to search for him
   • (B) Go
5. How many requisitions has he created? 4
6. What is the PO# for requisition number 52508? 602900
7. What is the date of his oldest requisition? 06-Jun-2006
Practice - Finding more information about a Requisition

Overview

In this practice, you will do the following:

• Search for a particular requisition and find additional information on that requisition.

Assumptions

• You must have access to the Training database 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 = trainXX
− Password = trainXX
− Responsibility = ECU Purchasing User

Find more information about requisitions

Search for requisition# 55411 and answer the following questions:

1. What is the PO number for this requisition? _______________________________________

2. Who raised this requisition? __________________________________________________

3. What is the invoice number for this requisition? ___________________________________

4. When and how was the invoice paid? ____________________________________________

Find out more about another requisition, search for requisitions for the supplier KI SCIENTIFIC PTY LTD

5. What is the requisition number? ________________________________________________

6. How much is the requisition for? _______________________________________________

7. Are there any holds on the invoice? _____________________________________________

8. If so, what is the name of the hold? ____________________________________________
Solution – Finding more information about a Requisition

Log on to the System
- Username = trainXX
- Password = trainXX
- 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.
   - Enter search criteria. Requisition# 55411, raised Any Time, status Approved.
   - (B) Go.

Answer the following questions:

2. What is the PO number for this requisition? 605729
3. Who raised this requisition? Brayshaw, Kim
   Hint: (H) Requisition number, look in requisition header information for ‘Created By’.
4. What is the invoice number for this requisition? WKI2150106
   Hint: (H) Requisition number > (I) Details > Scroll down to the Invoice section.
5. When and how was the invoice paid? Electronic Payment on 13-Nov-2006
   Hint: (H) Requisition number > (I) Details > Scroll down to the Payment section.

Find out more about another requisition, search for requisitions for the supplier KI SCIENTIFIC PTY LTD

- (N) iProcurement homepage.
- (T) Requisitions.
- (B) Search.
- Enter search criteria. Raised > Any Time, status > Approved, Supplier > KI SCIENTIFIC PTY LTD
- (B) Go
6. What is the requisition number?  
   55388

7. How much is the requisition for?  
   $13,990.00 AUD
   
   Hint: (H) Requisition number > check the Amount (AUD) column.

8. Are there any holds on the invoice?  
   Yes
   
   Hint: (H) Requisition number > (I) Details, scroll down down to the Invoice section, check the On Hold field.

9. If so, what is the name of the hold?  
   Quantity Received (Qty Rec)
   
   Hint: (H) Requisition number > (I) Details, scroll down down to the Invoice section > (H) Show:
Summary

After completing this module you should be able to:

- Check the status of a requisition
- Search for a requisition
- Find additional information about a requisition
iProcurement - Cancel a Requisition

Chapter 11
iProcurement Cancel a Requisition
Objectives

After completing this module you should be able to:

- Cancel a requisition
Cancel a Requisition

(N) iProcurement Homepage > (T) Requisitions > Select Requisition > (B) Cancel Requisition

Note: You cannot cancel a requisition that has been receipted, invoiced or paid in full. You cannot cancel a requisition for Corporate Express. If you need to cancel a Corporate Express requisition, call them to confirm the cancellation. Once they confirm it’s cancelled on their end, contact the Systems team who will cancel it for you.

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 the 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 cancellation before the requisition is placed on a purchase order, then the cancellation occurs immediately.

If you have 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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Cancel a requisition that has a purchase order number assigned

Track the cancellation request

Please note the following:

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

Log on to the System
- Username = trainXX
- Password = trainXX
- 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 eg., “The Supplier 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.
After completing this module you should be able to:

- Cancel a requisition
iProcurement Receiving
Objectives

After completing this module you should be able to:

- Find items to receive
- Receive items
- Return items
- Correct receipts
- View receipts
- Understand the importance of receiving
Finding and Receiving Items
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 where you can 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

You can also search by:

- Requisition Number
• Purchase Order Number
• Supplier

You can 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

Note: You can also receive items on behalf of others. Use the search fields to find the requisition.
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 where you can find 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 (ie you cannot receive more than one supplier on a receipt).
Receiving Items: Receipt Information (Step 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 where you can find 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 mandatory.
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 where you can find 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 - Find and Receive 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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Find and Receive items
Solution – Find and Receive Items

Log on to the System

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

Receive items

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

2. Find your requisitions.

3. (H) Receive Items.

4. Select items to receive by ticking in checkbox next to the line/s you want to receive. Adjust quantities if needed.

5. (B) Next.

6. Optionally, update the Receipt Date to reflect another date and / or time.

7. Optionally include a Receipt Comment.

   **Note:** you can record different information against each item that you are receiving.

8. (B) Next.

9. (B) Submit.
Returning Items
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 where you can 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 receive the items again in the iProcurement system when you physically receive the replacements.
- If you request a credit note you will need to track the progress (refer to Chapter ‘View Requisitions - Finding additional 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 FBSC 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:
   - Wrong Size
   - Wrong Quantity
   - Damaged on Arrival
   - Faulty
   - No Longer Required
   - Wrong Item

2. Some suppliers may give you a return authorisation number which you can enter in this field. It is not mandatory.

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)

(N) iProcurement Homepage > (T) Receiving > (H) Return 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 where you can find alternate values.

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.
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 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Find Receipt and Return some items
Solution – Returning Items

Log on to the System
− Username = trainXX
− Password = trainXX
− 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.
Correcting Receipts
Correcting Receipts

(Note) 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 where you can 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 menu 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 – 3 above.
Practice - Correcting Receipts

Overview

In this practice, you will do the following:

- Correct one 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 = trainXX
- Password = trainXX
- Responsibility = ECU Purchasing User

Find and Correct a receipt
Solution – Correcting Receipts

Log on to the System

– Username = trainXX
– Password = trainXX
– 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 receive items 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 correct.
   • 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.
View Receipts
**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 where you can find 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 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 = trainXX
- Password = trainXX
- 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 = trainXX
- Password = trainXX
- 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? ____________________________________________________________
The importance of Receiving

Why should I receive?

• If you do not receive the items in the system, the supplier will not get paid.
• If the supplier does not get paid, they may refuse to continue supplying goods / services to ECU, and may even initiate legal action to recover the money owed to them.
Summary

After completing this module you should now be able to:

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

Note: This flowchart shows the pre-requisites for training.
• Users who are regular purchasers of Assets including equipment, should attend at least the first 45 minutes of iAssets training

• The customised receiving process is demonstrated in this session.

Note: If you regularly purchase assets over $1,000 it is recommended you attend the iAssets training course. There are special receiving customisations that affect purchasing that are demonstrated and explained in this course.
Q&A