Setting iProcurement Preferences

Preferences can be set in iProcurement which will expedite your shopping and automatically populate certain fields on various checkout pages. You can set preferences for Shopping, Favourite Lists, Delivery Defaults, and Favourite Charge Accounts.

Important: When setting up Favourite Charge Accounts, you must set one as your Primary account.

Log into Themis and select the iProcurement responsibility.

1. Click on the Preferences link on the top right of the screen and click the iProcurement Preferences link under the Application menu.

Note: All iProcurement preference selections are made in this one screen.
Setting Shopping Preferences

2 Enter your desired shopping preferences as indicated in the table below.
   If you don’t make any selections the system defaults will apply.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Favourite Store</td>
<td>Enter the store name that you use most often to set it as the default store in the Search field on the Shopping screen. Otherwise leave it set as &quot;No Preference&quot; to accept the system default Main Store.</td>
<td>Note: By using Main Store to search, you will be searching the entire University catalogue. When you are shopping, the store name can be changed for each search action you perform if required.</td>
</tr>
<tr>
<td>Search Results Per Page</td>
<td>Enter the number of lines you wish to view per screen in the Receiving and Requisitions screens.</td>
<td>Note: the system defaults as “10” lines but can be changed if desired.</td>
</tr>
<tr>
<td>Shopping Search Results Per Page</td>
<td>Enter the number of items you wish to view in the catalogue search results screen.</td>
<td>Note: the system defaults as “7” items but can be changed if desired.</td>
</tr>
<tr>
<td>Sort Shopping Search Results By</td>
<td>Select a search attribute (descriptor) that you prefer to see your search results sorted by and indicate whether your results are to be sorted in Ascending or Descending order.</td>
<td>Note: the University has set search results to display the cheapest item first, if more than one of the same item is returned.</td>
</tr>
<tr>
<td>Shopping Search Results Layout</td>
<td>Select either; Grid View – to present the results in tabular row format like a spreadsheet. Paragraph View – to present the results in a paragraph similar to a printed catalogue.</td>
<td></td>
</tr>
</tbody>
</table>

Setting Favourite Lists

The system contains a favourite list called “Personal Favourites”, you can add an often purchased item to this list at any time while you are shopping by clicking on the Add to Favourites button in the shopping screens. However, should you want to organise your Personal Favourites into sub-lists you can do so as indicated below.

3 Click the Add Another Row button under the Favourite Lists area

4 Enter a name for your new favourite list and click Apply.
   You can add as many list names as desired. For example, you may wish to set up a separate list for favourite Stationary Items and Favourite Chemicals.

5 Click Set As Primary against the list you want to set as the favourite default list and click Apply.
   Once established your lists are displayed in the Select List drop down menu on the Shopping Lists screen and can be selected from your favourites whenever you need to raise a requisition rather than having to conduct a search for them each time you shop.
   Note: after adding an item to your Personal Favourite list if set as the primary list, you can then move your favourite items into the relevant sub-list as appropriate.
## Setting Delivery Defaults

6 Enter your desired delivery default preferences as indicated in the table below.

If you don’t make any selections the system defaults will apply.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
</table>
| Need-By Date Offset    | Defaulted as 2 but can be changed if desired.                                         | The number of day set here is used as a tolerance level to measure the supplier’s promptness in delivering the items ordered.  
For example, in setting 2 days in this Need-By-Date Offset field the system will count 2 days from the Need-By Date Time entered for each requisition, and once receipted issue a warning that the items were delivered outside our desired delivery date.  
**Note:** this is only useful for monitoring the supplier service and does not restrict you from processing orders or receipting the delivered items. |
| Need-By Date Time      | It is not recommended to set anything here.                                           | **Note:** If you wish to monitor the supplier’s delivery performance (as described in the comments of the field above) you should set a Need-By-Date Time when raising each requisition order and not as a default setting here. |
| Requester Name         | Defaults with your name as the Preparer but can be changed if desired.               | **Note:** If you most often order goods on behalf of a particular person other than yourself, you can set their name in this field as the default requestor. |
| Deliver-To Location    | Defaults with your own Budget Unit as the Preparer but can be changed if desired.    | You will be able to change this each time you raise a requisition.  
**Note:** if you most often order goods on behalf of a particular person other than yourself, you should set that person’s Budget Unit as the Deliver-To Location. |
| Subinventory           | N/A                                            | **Note:** sub-inventory is not used at the University. |
Setting Favourite Charge Accounts

Charge accounts are the General Ledger accounts to which a purchase will be charged. In this section you can set up the most commonly used charge accounts as your favourites and give each favourite account an easy to remember nickname i.e. Operating, Project A, Project B etc. Once set up, you will be able to select from your charge account favourites using the Nickname drop down list during the checkout process.

**Important:** You must mark one of your favourite accounts as your primary default account. The primary account will be populated automatically but can be changed in the requisition checkout stage if required.

To set a favourite charge account

7. Click the **Add Another Row** button under the Favourite Charge Accounts section in the Preferences screen.

A new account line will display.

For our example below, we had already added a favourite operating account and now we will add a favourite project account.

8. Enter a name in the **Nickname** field and then click on the **Account lookup** icon.

The account segments screen displays.

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7. Click the **Add Another Row** button under the Favourite Charge Accounts section in the Preferences screen.

A new account line will display.

For our example below, we had already added a favourite operating account and now we will add a favourite project account.

8. Enter a name in the **Nickname** field and then click on the **Account lookup** icon.

The account segments screen displays.
Enter the account segment codes as appropriate for the favourite account you are creating. **Important**: it doesn’t matter what expenditure natural account you enter because the natural account segment will change automatically based on the type of item you purchase while shopping. Refer to the *How favourite charge accounts work while shopping* section below for further details.

Continue with the steps to create the favourite charge account as described below.

Click the **Search** button to check if the account combination entered already exists in Themis. If it does exist it will display in the **Results** area at the bottom of the screen. If it doesn’t exist, click the **Create** button instead.

Select the **Radio** button next to the *existing or newly created* account string, and click the **Select** button. You can continue to add additional favourite charge accounts as desired.

**How favourite charge accounts work while shopping.**

For example, if making a purchase using our favourite operating charge account as set in our preferences below.

When we make the purchase, a bar fridge for example, the account string defaults from our favourite operating charge account preference, and only the natural account is replaced with the natural account for the item chosen.

**Important**: the natural account, once updated, must not be changed during the shopping requisition process.

**Apply all your preferences before exiting the iProcurement Preferences screen.**

Click the **Apply** button to save all your preference settings. **Note**: you must hit apply before you leave the iProcurement Preferences screen otherwise your preference settings will not be saved.