Requisitioning Catalogue Items

iProcurement is the University’s purchasing system, containing store catalogues built from various preferred suppliers and approved items for purchase. When you shop using the store catalogues a requisition will be automatically generated for the item(s) you select and checkout for purchase.

**Important:** this reference card covers the steps required to add items to your shopping cart and raise a requisition. It assumes that you already know how to search for the item you wish to purchase, if not please refer to the Searching the University Catalogue reference card.

Create a Catalogue Requisition

1. Log into Themis, select the **iProcurement** responsibility.
   The **Shop, Stores Home Page** will display.

2. Search for the item you wish to purchase.
   The search results will display all items containing your search criteria.

3. Click the **Add to Cart** button attached to your chosen item.
   **Important:** the **Special Information** screen will display, only if the item added requires a permit and/or that you complete a pre purchase checklist.

   ![Special Information Screen]

   There are some items such as dangerous goods or chemicals, and electrical equipment that require you to enter a permit number and/or complete an EHS pre purchase checklist.

4. Select the relevant permit number from the drop down list, if applicable.
   If no permit is required this field will not be displayed and you can skip this step.

5. Complete the pre purchase checklist, if applicable, and click **Continue**.
   If no checklist is required the checklist will not be displayed and you can skip this step.

   The added item will now appear in your Shopping Cart on the right of the screen.

   ![Shopping Cart]

   **Note:** you can continue to add more items to your cart as required.
6 Click the **View Cart and Checkout** button.

The **Shopping Cart** screen displays with a separate line for each added item.

7 Enter the number you wish to purchase into the **Quantity** field then press Tab on the keyboard.

The **Amount (AUD)** field will update with the total cost based on the quantity entered.

For this example we entered a quantity of ‘3’ chairs at a cost of $306.40 per chair which totals to $919.20.

8 Click the **Checkout** button.

A Requisition is created and opens at the **Requisition Information** screen, the first stage in the completion of the requisition details.

**Note**: the progression bar at the top of the screen shows you the stage of requisition completion i.e. beginning with the **Requisition Information** stage and ending with the **Review and Submit** stage.

9 Complete the **Delivery** and **Billing** details as indicated in the table below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need-By Date</td>
<td>Enter the date you need the items to be delivered by.</td>
<td>The systems measures the supplier’s delivery performance based on how close to your Need-By Date they deliver the items to you. A 2 days threshold has been set as the <em>Need-By Date Offset</em> default. Therefore if the items are delivered within 2 days of your Need-By Date the supplier has met the delivery requirements in a timely manner. <strong>Note</strong>: This field setting is merely for information purposes only. Whatever date you enter here, and regardless of whether the item(s) are delivered on time or are late, you will still be able to receipt the items against the requisition once they are received.</td>
</tr>
<tr>
<td>Requester</td>
<td>Defaults with your name but can be changed if required.</td>
<td><strong>Note</strong>: If you are ordering items for someone else you should change the Requester to the name of the person for whom you are ordering the items.</td>
</tr>
<tr>
<td>Deliver-To Location</td>
<td>Defaults with your location but can be changed if required.</td>
<td><strong>Note</strong>: If you are ordering items for someone else you should change the Location to the address of the person for whom you are ordering the items.</td>
</tr>
<tr>
<td>Field</td>
<td>Action</td>
<td>Comment</td>
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<td>-----------------------</td>
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</tr>
<tr>
<td>Billing</td>
<td></td>
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<tr>
<td>Project</td>
<td>Leave blank, this feature is not used at the University.</td>
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</tr>
<tr>
<td>Task</td>
<td>Leave blank, this feature is not used at the University.</td>
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</tr>
<tr>
<td>Expenditure Type</td>
<td>Leave blank, this feature is not used at the University.</td>
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<tr>
<td>Expenditure Organization</td>
<td>Leave blank, this feature is not used at the University.</td>
<td></td>
</tr>
<tr>
<td>Expenditure Item Date</td>
<td>Leave blank, this feature is not used at the University.</td>
<td></td>
</tr>
</tbody>
</table>
| Charge Account         | Defaults from your HR record or from your primary account preference but can be changed if required. | With the exception of the natural account segment the remainder of the charge account string can be updated as appropriate to the item(s) being purchased.  
**Note:** the natural account segment updates automatically based on the category of the item you are purchasing and should not be changed. |
| Tax Classification Code | Defaults based on the item you are purchasing but can be changed if required. | For example, if the item is purchased from a local supplier the field will default as 'GST', however, if the supply is from overseas the field will default as 'FREE-GST'. |

10 Click the **Next** button.

The **Approvals** screen displays showing the people assigned to the requisition as approvers. For this example there are no approvers assigned because the total requisition amount is within the Preparer’s financial delegation level.
Important: different levels of approval apply depending on the total cost of the requisition, whether the item requires a permit, and the rules established by your Faculty or Division.

The following Approval settings apply;

**Auto-approval within the Preparer's financial delegation**
If the grand total of the requisition items is within your level of financial delegation, then no financial approver will be assigned to the requisition. In this instance the requisition will automatically be approved based on your delegation level. However you do have the option of manually adding additional approvers if required using the Manage Approvals button.

**Assigned Approvers above the Preparer's financial delegation**
If the grand total of the requisition items is above your level of financial delegation, another approver next in line in the approval hierarchy will automatically be assigned against the requisition.

**Added Reviewer**
In some instances your Faculty or Division may require an additional non-financial Reviewer to approve the requisition, if so you can add people with a Reviewer role to the requisition using the Manage Approvals button.

**Permit holders**
For items requiring a permit such as dangerous goods, the requisition will be pre-approved by the permit holder based on the permit number entered against the requisition at step 4 above.

To add additional approvers please refer to the section below on Adding an Approver to a Requisition, otherwise proceed to step 11 below.

11 Enter a reason for making the purchase into the **Justification** field.

*Note:* the comment you enter here will be visible to the approver and should be a clear concise statement of why you are making the purchase.

12 If applicable, click the **Add Attachment** button to add any supporting documentation to the requisition.

The Add Attachment form opens.

![Add Attachment Form](attachment.png)

Enter a document name in the **Title** field, click the **Browse** button and locate the file in your local directory, select the file name and click **Open** to populate the **File** field then click **Apply** to add the attachment to the requisition.

The Approvals screen is returned.

*Note:* in addition to adding a file attachment you may add a written attachment to send a note to the supplier, to provide special delivery instructions for example. To do so, select the 'To Supplier' option from the **Category** drop down list, select the 'Text' option in the Define Attachment section and type in your instructions to the supplier in the free text field.

13 Click the **Next** button to proceed.

The Review and Submit screen will display showing a requisition summary.

Here you have an opportunity to review the requisition details before going ahead and submitting it for approval. Should you need to correct any of the details you can do so using the **Back** button to return to the previous screen(s) that require changes.

14 Click **Submit**.

*Note:* once submitted, the requisition will either be automatically approved (if within your delegation level) or sent to the first level approver in the hierarchy.
Adding additional approvers to a requisition

1. Complete steps 1 to 10 of the Create a Catalogue Requisition steps outlined above. The Approvals screen displays showing the people assigned to the requisition as approvers. For this example, we can see that there is only one approver assigned against the requisition.

2. Click the Manage Approvals button. The Checkout: Manage Approvals screen displays.

3. Select the Insert Approver option under the Actions area.

4. Enter the name of the person to be added into the Approver field. You can do so by typing their last name i.e. ‘BELL’ and pressing Tab on the keyboard, or by using the Search icon to locate them in the staff listing.

5. From the Add to Location drop down list, select the position in the approval hierarchy where the new approver is to be situated. For example, we are adding Sandy Bell as an approver, and have elected to place her after Beena Mattam in the approval position as shown in the screen shot below.

6. Click Submit. The Approvals screen is returned showing the person added as an approver against this requisition.

7. Complete the remaining steps 11 and 14 of the Create a Catalogue Requisition steps outlined above.