Creating an internal order

An internal order may be used to purchase goods or services from another department or service area within the University (e.g.: a training course, hiring of facilities or equipment, security cards, etc).

Issuing an internal order

1. Navigate to Internal Transactions > Transactions.
   The Internal Order/Supply Summary screen will display. Note: any transactions that have been created by or requested of your department will display in this screen.

2. Click on the New Order button located at the bottom of the screen.
   The Enter Internal Orders screen will display.

3. Complete the transaction details.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Type</td>
<td>This field will default to Internal Order.</td>
<td></td>
</tr>
<tr>
<td>Order Date</td>
<td>This field will default to today and should not be changed.</td>
<td></td>
</tr>
<tr>
<td>Required By</td>
<td>This field will default to today and should not be changed.</td>
<td></td>
</tr>
<tr>
<td>Order Department</td>
<td>This field will default to the department and section you have set in your User Profiles. For further details on setting your profiles refer to the Setting your user profiles reference card.</td>
<td></td>
</tr>
<tr>
<td>Order Section</td>
<td>This field will default to the department and section you have set in your User Profiles. For further details on setting your profiles refer to the Setting your user profiles reference card.</td>
<td></td>
</tr>
<tr>
<td>Supply Department</td>
<td>Type the number of the department from which you are requesting goods/services and press Tab. Alternatively, you may select the appropriate department from the List of Values (LOV).</td>
<td></td>
</tr>
<tr>
<td>Supply Section</td>
<td>Select the appropriate section from the LOV.</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Enter an appropriate description of the transaction. These details will display as a summary reference in the body of the email correspondence sent to the supplying department.</td>
<td></td>
</tr>
</tbody>
</table>

4. Details in the Order tab will populate from your defaults. You may alter these details manually if required.

<table>
<thead>
<tr>
<th>Order Attention</th>
<th>Miss Terri Novell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td><a href="mailto:novell@unimelb.edu.au">novell@unimelb.edu.au</a></td>
</tr>
<tr>
<td>Telephone</td>
<td>03 44 2222</td>
</tr>
<tr>
<td>Fax</td>
<td>03 44 2222</td>
</tr>
</tbody>
</table>

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5 Click on the Delivery tab and complete the details if required.

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>This field will default to 1.</td>
<td>Note: in subsequent lines this will default to the next available line number in sequence.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the goods/services you require.</td>
<td>Alternatively, you may copy and paste the general description for the internal order entered above.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Enter the price per unit of the goods/services required.</td>
<td></td>
</tr>
<tr>
<td>UOM</td>
<td>Select the unit of measure from the LOV.</td>
<td></td>
</tr>
<tr>
<td>Qty Ordered</td>
<td>Enter the quantity of goods/services you require.</td>
<td></td>
</tr>
<tr>
<td>Total Price</td>
<td>Themis will automatically calculate this value based on the Unit Price and Qty Ordered entered above.</td>
<td>You may need to place your cursor in this field to view the total price.</td>
</tr>
</tbody>
</table>

6 Place your cursor on the first line in the Order Lines section of the screen and enter the line item details.

<table>
<thead>
<tr>
<th>Field</th>
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<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Click on the LOV and complete your charge account details.</td>
<td>Many of the segments will default based on your user profile settings. Note: the Natural Account segment must be from the 72XX [Expense] series.</td>
</tr>
<tr>
<td>Debit</td>
<td>Enter the debit amount for the account line.</td>
<td>Note: The Debit total must equal the total order price.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the account line.</td>
<td>Alternatively, you may copy and paste the description from the order line. Note: the description entered in this field will display on your General Ledger reports.</td>
</tr>
</tbody>
</table>

7 Click on the Distribution button and enter the account charging details.

**Note:** if you have multiple order lines you will have to complete a separate Distribution screen for each line entered.

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</tr>
<tr>
<td>Debit</td>
<td>Enter the debit amount for the account line.</td>
<td>Note: The Debit total must equal the total order price.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the account line.</td>
<td>Alternatively, you may copy and paste the description from the order line. Note: the description entered in this field will display on your General Ledger reports.</td>
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8 Click on the Save icon in the toolbar and close the Distributions screen.

Themis will automatically generate an Order Number (displayed on the top left of the Enter Internal Orders screen).

9 Click on the Approve Order button.

The Approver Document screen will display.

The approver will default as specified in your User Profiles, but you may select an alternative approver if required.

10 Click the OK button to submit the order for approval.

The selected approver will receive a worklist notification advising that the transaction requires action. If the order is not actioned the same day, an email notification will also be sent (overnight) to the approver. Once approved, the order will display in the Internal Order/Supply Summary screen of the department who will supply the goods/services.