Receipting a requisition in iProcurement

iProcurement is the University’s purchasing system, containing store catalogues built from various preferred suppliers and approved items for purchase. You can shop by using the University catalogue to create a requisition or by using the non-catalogue requisition process to purchase items not listed in the catalogue. Either way a purchase order will be created and linked to the requisition. The purchase order is sent to the supplier and they will quote the PO number on the delivery paperwork when the items are delivered to you. You can use the PO number to search and retrieve the relevant requisition to be receipted.

Receipting a requisition in iProcurement

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

2. Click on the Receiving tab at the top of the screen. The Receiving screen displays. Your most recently approved requisitions for which a purchase order has been created will be listed under the Requisitions to Receive section of the screen.

From here you can either, click the Receive icon next to one of the listed requisitions to receipt items pertaining to that requisition number or for older requisitions you can use the search feature to retrieve a particular requisition and create the receipt.

Note: you can also retrieve and process receipts for requisitions raised by another person within your Faculty or Division.

Either option will generate the receipt taking you to the same receiving screen used to complete the receipt details.

Continue with the steps below to use the search feature to find the requisition to be receipted.
Search for the requisition to be receipted.

3. Select **Items to Receive** as the action option in the **Search** field.

   Setting the action to ‘Items to Receive’ initiates the receiving process in the system.

4. Select a **Search Attribute** option from the drop down list.

   You can search by **Requisition Number**, **Order Number** or by **Supplier**.

   We recommend you search using the **Order Number** option as the purchase order should be quoted on the delivery paperwork received from the supplier.

5. Enter the purchase order number in the **Search Value** field

   **Note**: if you are searching by requisition number, you should enter the requisition number here.

6. Click **Go**.

   The **Receive Items: Select Items** screen displays.

   **Note**: the progression bar at the top of the screen shows you the stage of receipt completion i.e. beginning with the **Select Items** stage and ending with the **Review and Submit** stage. This is the same screen you would have arrived at by clicking the **Receive** icon at step 2 above.

   The purchase order we searched for has returned the associated requisition.

7. Click the **Select** checkbox next to the retrieved requisition line.

8. If you are receipting only some of the items, change the **Receipt Quantity** number as appropriate.

9. Click the **Next** button.

   The **Receipt Information** screen displays.
**Note:** a warning message will appear at the top of the screen if your item was delivered outside the 2 day tolerance period against the date specified in the *Need By Date* field when the requisition was raised. This is for your information only, to notify you that the supplier did not provide the goods in a timely manner. The error message does not prevent you from going ahead and receipting your item(s).

10. Enter an appropriate **Packing** and **Receipt Comments** if desired and click the **Next** button. For example, if you are raising a partial receipt you may wish to enter a comment indicating what portion of the order you are receipting. If 5 of 15 items are on backorder you might indicate that only 10 items were delivered and 5 are backordered. The **Review and Submit** screen displays.

11. Tick the confirmation checkbox to acknowledge that items have been received, handled and stored in accordance with EHS requirements and in line with the pre-purchase checklist (where applicable).

12. Click the **Submit** button.