

# EDUCATION AUTHORITY

## iProcurement Approver's User Guide

2019

Requisition/Order Queries: Tel. 028 9056 6499 or Email [procurement@eani.org.uk](mailto:procurement@eani.org.uk)

System/Login Queries: Tel. 028 9056 6478 or Email [ifs.queries@eani.org.uk](mailto:ifs.queries@eani.org.uk)

iProcurement Accounts Queries: Helpdesk Tel. 028 9056 6233 or Email  
[accounts@eani.org.uk](mailto:accounts@eani.org.uk)

*This is a Training guide for the EA iPROCUREMENT module for the Education Authority.*

## 1. INTRODUCTION & NAVIGATION

iProcurement or iProc is short for Oracle internet procurement. It is the new method to allow you to request goods or services for your school or section in the Education Authority (EA). It uses web based forms similar to those used on many internet shopping sites.

Oracle iProcurement provides the user with more information on products and aims to be both more intuitive and faster than previous Oracle Requisitioning.

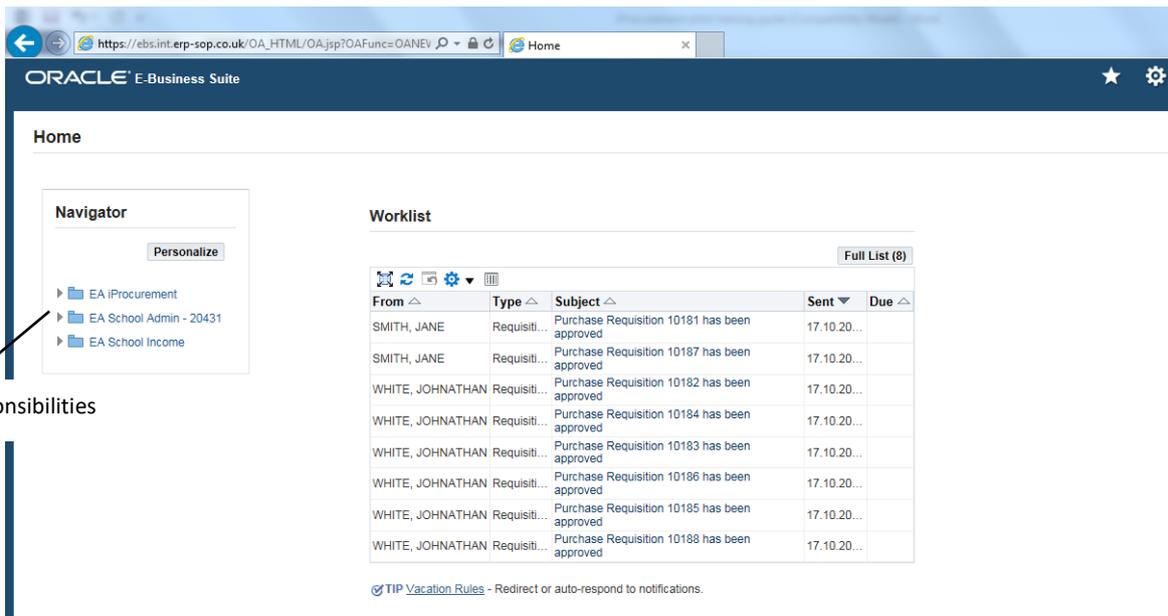
### 1.1 Logging on to EA Financial System

To access the EA Financial system an Oracle logon is located on your PC desktop. Click on the icon.

The following screen will appear:

- Enter '**User Name**'; this will be your employee number.
- Enter '**Password**' (passwords are case sensitive and must be 5+ characters). Please be aware that the EA Financial System will include your personal HR and Payroll details, therefore we advise that you keep your password confidential.
- Click '**Login**' or press return

The following screen – 'Home' page will appear listing all the responsibilities you have been set up with (responsibilities are allocated as per job requirements). [Note: if you have not setup your email notifications please access the 'First Logon Change Notification Method' user guide on the EA Intranet]

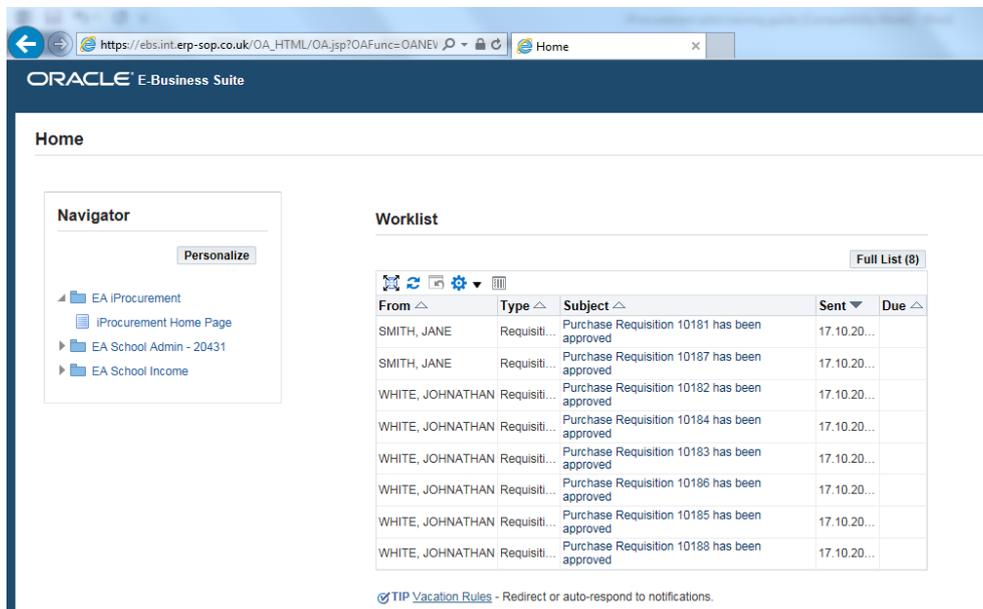


List of Responsibilities

## 1.2 Navigating iProcurement

### Navigator /Responsibilities

- Click on a responsibility within the 'Navigator' section. The menu of functions available within that responsibility will be listed

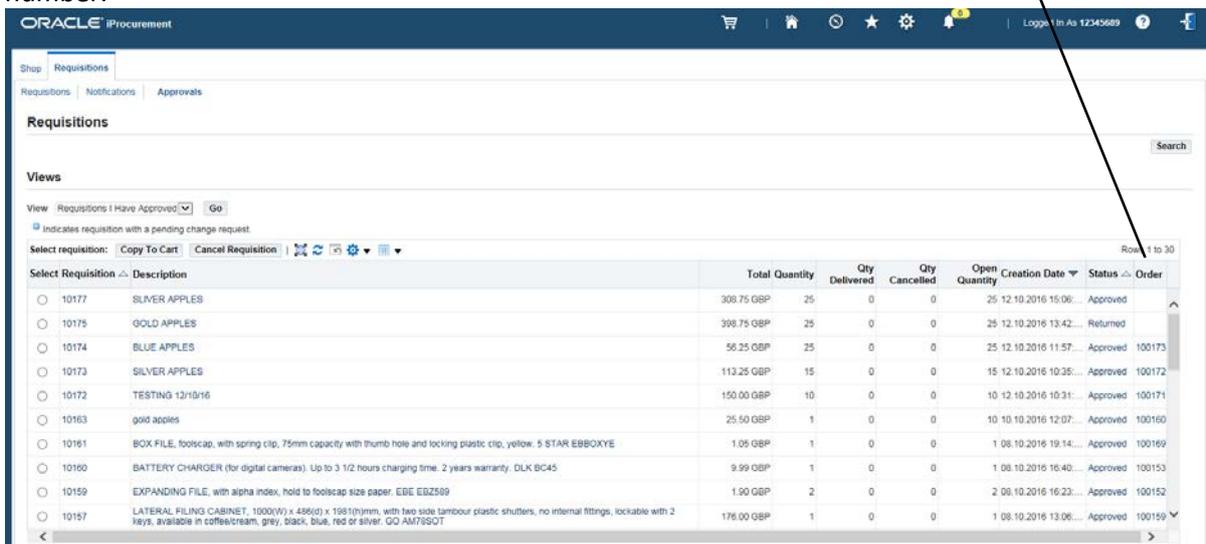


- Click on one of the function links to open a responsibility, e.g. EA iProcurement Approver.

## Drill Down feature

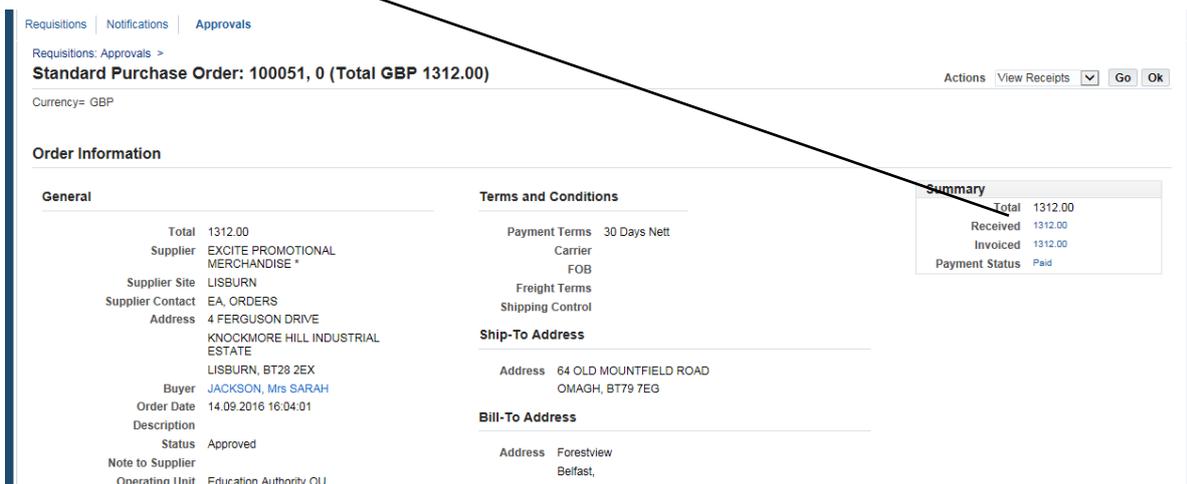
- A useful feature within iProcurement is the ability to drill down and back up to view full transaction history and associated transactions e.g. receipts, invoices, payments, etc. Click on anything that is hyperlinked (highlighted blue) to view further information e.g. Order Number will enable you view the Purchase Order, Invoice amount hyperlink will enable you to drill down to the Invoice and even right down to the payment.
- You can drill up and down within iProcurement including viewing the full action history showing who completed the transaction and when.

e.g. drill down from order number down to payment. Click on the hyperlink of the individual order number.



Select Requisition	Description	Total Quantity	Qty Delivered	Qty Cancelled	Open Quantity	Creation Date	Status	Order
10177	SILVER APPLES	308.75 GBP	25	0	0	25 12 10.2016 15:06...	Approved	
10175	GOLD APPLES	398.75 GBP	25	0	0	25 12 10.2016 13:42...	Returned	
10174	BLUE APPLES	56.25 GBP	25	0	0	25 12 10.2016 11:57...	Approved	100173
10173	SILVER APPLES	113.25 GBP	15	0	0	15 12 10.2016 10:35...	Approved	100172
10172	TESTING 12/10/16	150.00 GBP	10	0	0	10 12 10.2016 10:31...	Approved	100171
10163	gold apples	25.50 GBP	1	0	0	10 10 10.2016 12:07...	Approved	100160
10161	BOX FILE, foolscap, with spring clip, 75mm capacity with thumb hole and locking plastic clip, yellow, 5 STAR EBBOXYE	1.05 GBP	1	0	0	1 08 10.2016 19:14...	Approved	100169
10160	BATTERY CHARGER (for digital cameras). Up to 3 1/2 hours charging time. 2 years warranty. DLK BC45	9.99 GBP	1	0	0	1 08 10.2016 16:40...	Approved	100153
10159	EXPANDING FILE, with alpha index, hold to foolscap size paper. EBE EB2509	1.90 GBP	2	0	0	2 08 10.2016 16:23...	Approved	100152
10157	LATERAL FILING CABINET, 1000(W) x 486(D) x 1881(H)mm, with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, available in coffee/cream, grey, black, blue, red or silver. GO AM75GOT	176.00 GBP	1	0	0	1 08 10.2016 13:06...	Approved	100159

You can click on the Received amount to view receipt details and continue to drill down to further information (see screens below)



Requisitions: Approvals >  
**Standard Purchase Order: 100051, 0 (Total GBP 1312.00)**  
 Currency= GBP

Order Information

General		Terms and Conditions		Summary	
Total	1312.00	Payment Terms	30 Days Nett	Total	1312.00
Supplier	EXCITE PROMOTIONAL MERCHANDISE *	Carrier		Received	1312.00
Supplier Site	LISBURN	FOB		Invoiced	1312.00
Supplier Contact	EA_ORDERS	Freight Terms		Payment Status	Paid
Address	4 FERGUSON DRIVE KNOCKMORE HILL INDUSTRIAL ESTATE LISBURN, BT28 2EX	Shipping Control			
Buyer	JACKSON, Mrs SARAH	<b>Ship-To Address</b>			
Order Date	14.09.2016 16:04:01	Address	64 OLD MOUNTFIELD ROAD OMAGH, BT79 7EG		
Description		<b>Bill-To Address</b>			
Status	Approved	Address	Forestview Belfast,		
Note to Supplier					
Operating Unit	Education Authority OU				

Requisitions | Notifications | Approvals

Requisitions: Approvals >

### Receipts for Standard Purchase Order: 100051

[Export](#)

Receipt	PO Number	Line	Shipment	Description	UOM	Ordered	Returned	Net Received	Accepted	Defects	Location	Receipt Date	Promised Date	Need-By Date	Performance
52	100051	2	1	PROMOTIONAL ITEM 162408 - TELEPHONE MAGNET, Multi, with Student Finance NI Logo, Web address and Telephone number. Priced Per Pack of 500	Pack	1.0		1	0.0		GIBSON PS MK	15.09.2016 18:20:12		20.09.2016 00:00:00	On-Time
52	100051	1	1	PROMOTIONAL ITEM 04060857 - STRESS PIG, Pink with Student Finance NI Logo and Web address. Priced Per Pack of 500	Pack	1.0		1	0.0		GIBSON PS MK	15.09.2016 18:20:12		20.09.2016 00:00:00	On-Time
52	100051	5	1	PROMOTIONAL ITEMS 131457 - BALLPEN CONTOUR DIGITAL, White/Blue with Student Finance NI Logo and Web address. Priced Per	Pack	1.0		1	0.0		GIBSON PS MK	15.09.2016 18:20:12		20.09.2016 00:00:00	On-Time

Shop | Requisitions

Requisitions | Notifications | Approvals

Requisitions: Approvals > Requisition Details > View Order Details >

### Invoices for Standard Purchase Order: 100051

[Export](#)

Invoice	Invoice Date	Type	Supplier	Supplier Site	Currency	Amount	Due	Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	Payment	PO Number	Receipt	Attachments
PO2	20.09.2016	Standard	EXCITE PROMOTIONAL MERCHANDISE *	LISBURN	GBP	1574.40	0.00	Approved		Paid			20.10.2016	48	100051		

[Return to View Order Details](#)

Requisitions | Notifications | Approvals

Requisitions: Approvals > Requisition Details > View Order Details > View Invoices >

### Standard Invoice: PO2 (Total GBP 1574.40)

[Export](#)

Currency= GBP

General		Amount Summary		Payment Information	
Invoice Date	20.09.2016	Item	1312.00	Paid	1574.40
Status	Approved	Freight	0.00	Discount Taken	0.00
On Hold		Miscellaneous	0.00	Due	0.00
Batch	KC PO 2nd	Tax	262.40	Status	Paid
Attachments	None	Prepayment	0.00	Payment Date	21.09.2016
Supplier	EXCITE PROMOTIONAL MERCHANDISE *	Retainage	0.00	Payment	48
Supplier Site	LISBURN	Withholding Tax	0.00	Term	30 Days Nett
Address	4 FERGUSON DRIVE KNOCKMORE HILL INDUSTRIAL ESTATE LISBURN, BT28 2EX	Total	1574.40		

[Invoice Lines](#) | [Scheduled Payments](#) | [Hold Reasons](#)

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	PROMOTIONAL ITEM 04060857 - STRESS PIG, Pink with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	410.00		410.00	0.00	Approved	100051	1	1	JACKSON, Mrs SARAH	

ORACLE iProcurement

Shop | Requisitions

Requisitions | Notifications | Approvals

Requisitions: Approvals > Requisition Details > View Order Details > View Invoices > Invoice Details >

### Payment: 48 (Total GBP 1574.40)

[Export](#)

Payment Date	21.09.2016	Supplier	EXCITE PROMOTIONAL MERCHANDISE *
Method	Electronic	Supplier Site	LISBURN
Status	Negotiable	Address	4 FERGUSON DRIVE KNOCKMORE HILL INDUSTRIAL ESTATE LISBURN BT28 2EX
Status Date	21.09.2016	Bank Account	EA General Payments
Remit-to Supplier	EXCITE PROMOTIONAL MERCHANDISE *		
Remit-to Supplier Site	LISBURN		

#### Included Invoices

Invoice	Invoice Date	Type	Currency	Amount	Status	Payment Status	Payment PO Number	Receipt	Attachments
PO2	20.09.2016	Standard	GBP	1574.40	Approved	Paid	1574.40 100051		

## Browser 'Back' Button

- Do not use the 'Back' button within Oracle. To navigate within the screens 'return' message links are found at the bottom of the screens to return to the previous page, or follow the directions of the transaction e.g. 'OK', 'Submit' buttons.

Address 4 FERGUSON DRIVE  
KNOCKMORE HILL INDUSTRIAL ESTATE  
LISBURN, BT28 2EX

Total 1574.40

Invoice Lines Scheduled Payments Hold Reasons

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	PROMOTIONAL ITEM 04060857 - STRESS PIG, Pink with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	410.00		410.00	0.00	Approved	100051	1	1	JACKSON, Mrs SARAH	
2	Item	PROMOTIONAL ITEM 162408 - TELEPHONE MAGNET, Multi, with Student Finance NI Logo, Web address and Telephone number. Per Pack of 500	1	Pack	99.00		99.00	0.00	Approved	100051	2	1	JACKSON, Mrs SARAH	
3	Item	PROMOTIONAL ITEM 189364 - FLIP MOBILE PHONE HOLDER, Blue with Student Finance NI Logo, Web address and Telephone number. Priced Per Pack of 500	1	Pack	410.00		410.00	0.00	Approved	100051	3	1	JACKSON, Mrs SARAH	
4	Item	PROMOTIONAL ITEM 606312 - DUO HIGHLIGHTER, White with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	279.00		279.00	0.00	Approved	100051	4	1	JACKSON, Mrs SARAH	
5	Item	PROMOTIONAL ITEMS 131457 - BALLPEN CONTOUR DIGITAL, White/Blue with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	114.00		114.00	0.00	Approved	100051	5	1	JACKSON, Mrs SARAH	
6	Tax	UK TAX - UK-VAT						262.40	Approved					

Return to View Invoices

## Vacation Rule

- A Vacation rule can be created to handle your notifications automatically when you are not available to manage your notifications directly, such as when you are on leave. You can setup rules to send the notification automatically to another Approver (with the same Approval limits) for a period of time.

ORACLE E-Business Suite

Home

Navigator

Personalize

- EA iProcurement
- iProcurement Home Page
- EA School Admin - 20431
- EA School Income

Worklist

Full List (8)

From	Type	Subject	Sent	Due
SMITH, JANE	Requisiti...	Purchase Requisition 10181 has been approved	17.10.20...	
SMITH, JANE	Requisiti...	Purchase Requisition 10187 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10182 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10184 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10183 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10186 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10185 has been approved	17.10.20...	
WHITE, JOHNATHAN	Requisiti...	Purchase Requisition 10188 has been approved	17.10.20...	

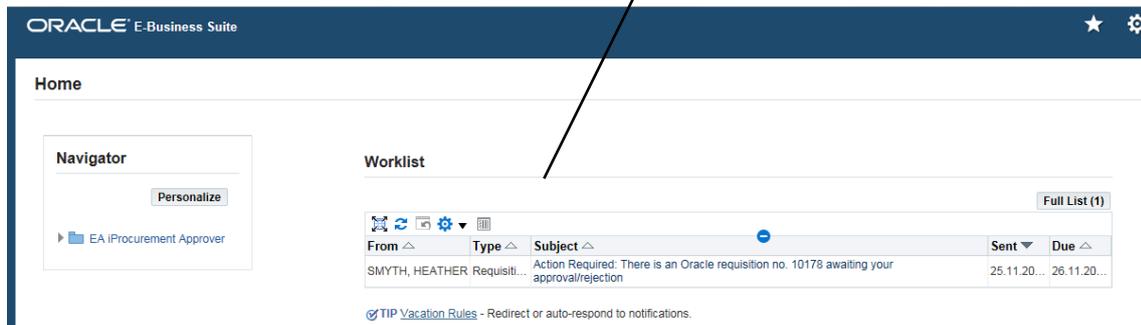
TIP Vacation Rules - Redirect or auto-respond to notifications.

## 2. APPROVALS

The Approver (Budgetholder) can approve a requisition submitted to them by logging into Oracle or directly via their email. An Approver is setup in Oracle with an Approval limit as directed by Finance.

### 2.1 Approve Requisition Within Oracle Worklist

2.1.1 A requisition can be approved within the Worklist in the Oracle Home page.

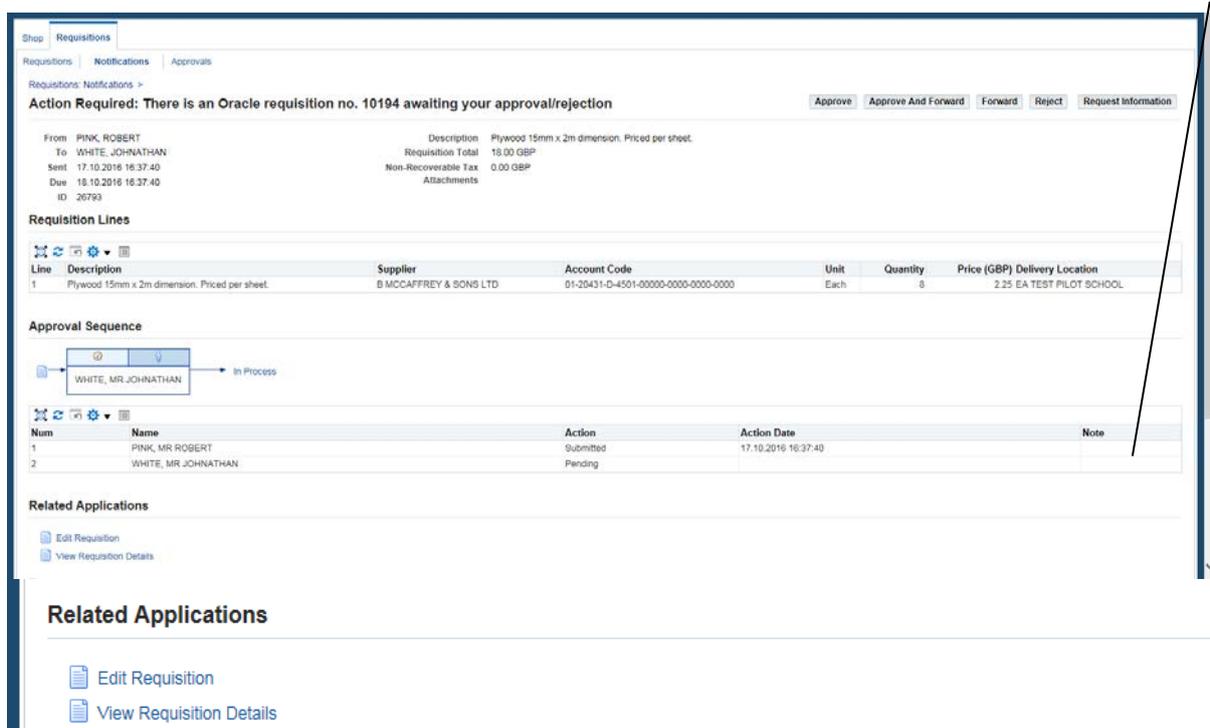


2.1.2 Open the notification by clicking on the subject link of the requisition that requires approval.

2.1.3 The notification will contain the Requisition details including Total, Accounting Charge Account and the Approval Sequence. If there are any Notes to Approver (Justification) this will be details in the Note field.

2.1.4 The original requisition can be viewed by clicking on the 'View Requisition Details' link in the Related Applications section of the screen. The 'Edit Requisition' link will display an error message if clicked as an approver is unable to edit a requisition.

Note to Approver if entered will be displayed here.



2.1.5 The Approver can action the Requisition by clicking on one of the following buttons:

- Approve
- Approve and Forward (Approve Requisition and forward to another Budget holder)
- Forward (Does not Approve but forwards Requisition for Approval to another Budget holder)
- Reject (Rejects Requisition and returns it to the Requestor)
- Request Information (Sends a notification to the Requestor requesting further information)

2.1.6 If the action is 'Approve' go to Step 2.1.14.

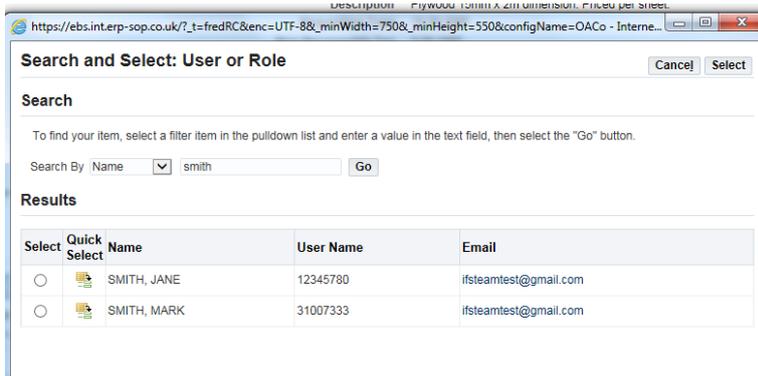
2.1.7 The 'Approve and Forward' and 'Forward' action requires the name of the Budget holder who it is being forwarded to needs be entered in the 'Forward To' field.

The screenshot displays the Oracle Requisition Notifications interface. At the top, there are buttons for 'Approve', 'Approve And Forward', 'Forward', 'Reject', and 'Request Information'. The notification details include: From: PINK, ROBERT; To: WHITE, MR JOHNATHAN; Sent: 17.10.2016 16:37:40; Due: 18.10.2016 16:37:40; ID: 26793. The requisition description is 'Plywood 15mm x 2m dimension, Priced per sheet' with a total value of 18.00 GBP. The 'Requisition Lines' table has one entry: Line 1, Description 'Plywood 15mm x 2m dimension, Priced per sheet', Supplier 'B MCCAFFREY & SONS LTD', Account Code '20451-D-4501-00000-0000-0000', Unit 'Each', Quantity '8', Price '(GBP)' '2.25', and Delivery Location 'EA TEST PILOT SCHOOL'. The 'Approval Sequence' shows a flow from 'PINK, ROBERT' (Submitted) to 'WHITE, MR JOHNATHAN' (Pending). The 'Response' section has a 'Forward To' dropdown set to 'All Employees and Users' and a search field with a magnifying glass icon. The 'Related Applications' section has links for 'Edit Requisition' and 'View Requisition Details'.

An error message will be displayed if you click 'Edit Requisition' as an approver is unable to edit, only approve within iProcurement (Audit segregation of duties).

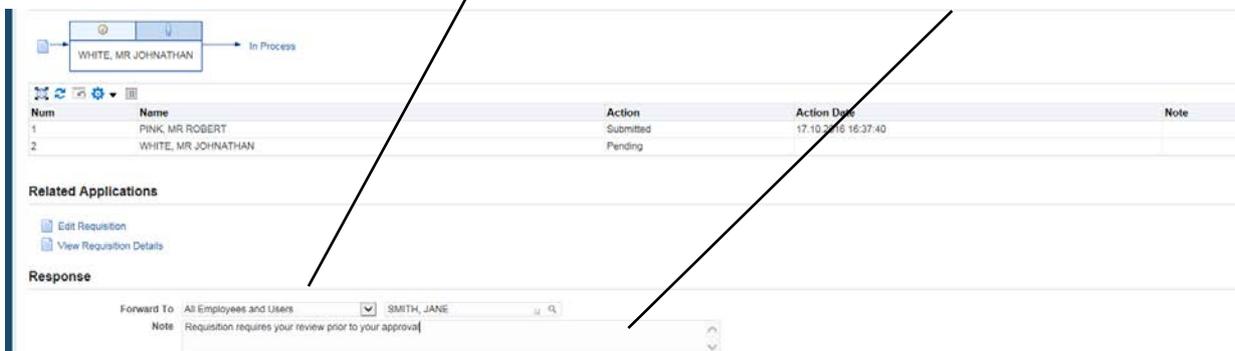
Click on magnifying glass to search for employee for forward to.

2.1.8 Use the magnifying glass to 'Search and Select'. Enter first few digits or full surname of the Approver to forward to, click 'Go'. Click on the 'Quick Select' icon to the left of the relevant Name shown in the screen below.



2.1.9 The Name will be populated in the 'Forward to' field. Enter a message to the person in the 'Note' field if required.

'Note': Alternatively a message to the Requestor can be entered here if you plan to click 'Reject' or Request Information' button



2.1.10 Click the relevant Action e.g. 'Approve' or 'Approve and Forward', etc.



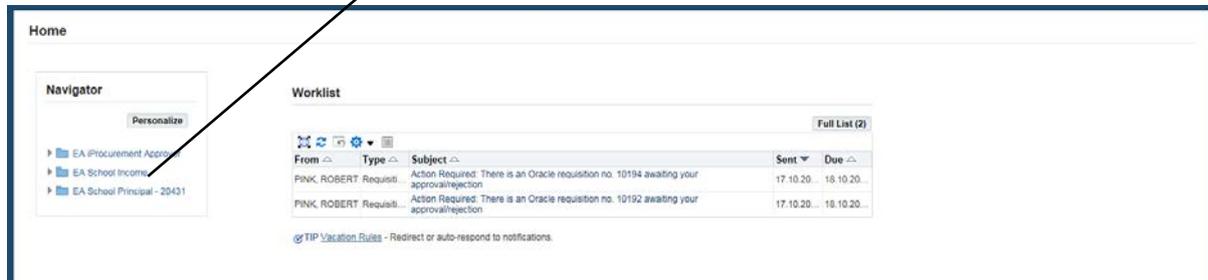
2.1.11 The Notification will be removed from the Open Notification page. A notification will be sent to the Requestor that the Requisition has been approved.



2.1.12 A notification (worklist and email) will be sent to the Requestor that the Requisition has been approved.

## 2.2 Approve Requisition Within EA iProcurement Approver Responsibility

2.2.1 Click on to the EA iProcurement Approver responsibility in the 'Navigator' section of the Oracle Home page.



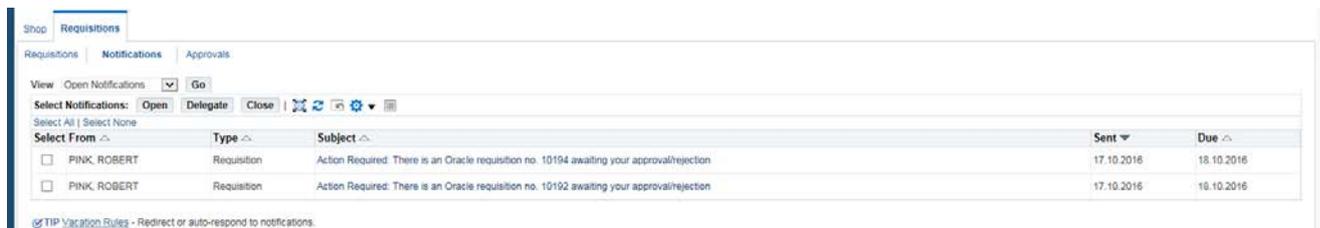
2.2.2 Click on to the Requisitions tab.



2.2.3 Click on Notifications to view Requisitions requiring Approval.



2.2.4 A list of notifications will be displayed.



2.2.5 The View 'Open Notification' will default. This means that it is only showing requisitions that require action.

2.2.6 Open the notification by clicking on the subject link of the requisition that requires approval.

Shop Requisitions

Requisitions Notifications Approvals

Requisitions: Notifications >

**Action Required: There is an Oracle requisition no. 10194 awaiting your approval/rejection** Approve Approve And Forward Forward Reject Request Information

From: PINK, ROBERT Description: Plywood 15mm x 2m dimension. Priced per sheet.  
 To: WHITE, JOHNATHAN Requisition Total: 18.00 GBP  
 Sent: 17.10.2016 16:37:40 Non-Recoverable Tax: 0.00 GBP  
 Due: 18.10.2016 16:37:40 Attachments  
 ID: 26793

**Requisition Lines**

Line	Description	Supplier	Account Code	Unit	Quantity	Price (GBP)	Delivery Location
1	Plywood 15mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS LTD	01-20431-D-4501-0000-0000-0000	Each	8		2.25 EA TEST PILOT SCHOOL

**Approval Sequence**

```

graph LR
  A[WHITE, MR JOHNATHAN] --> B[In Process]
  
```

**Related Applications**

- Edit Requisition
- View Requisition Details

Num	Name	Action	Action Date	Note
1	PINK, MR ROBERT	Submitted	17.10.2016 16:37:40	
2	WHITE, MR JOHNATHAN	Pending		

Note to Approver if entered will be displayed here.

2.2.7 The notification will contain the Requisition details including Total, Accounting Charge Account and the Approval Sequence. If there are any Notes to Approver (Justification) this will be details in the Note field.

2.2.8 After reviewing the Requisition details, click on the appropriate action e.g. 'Approve', 'Reject', etc.

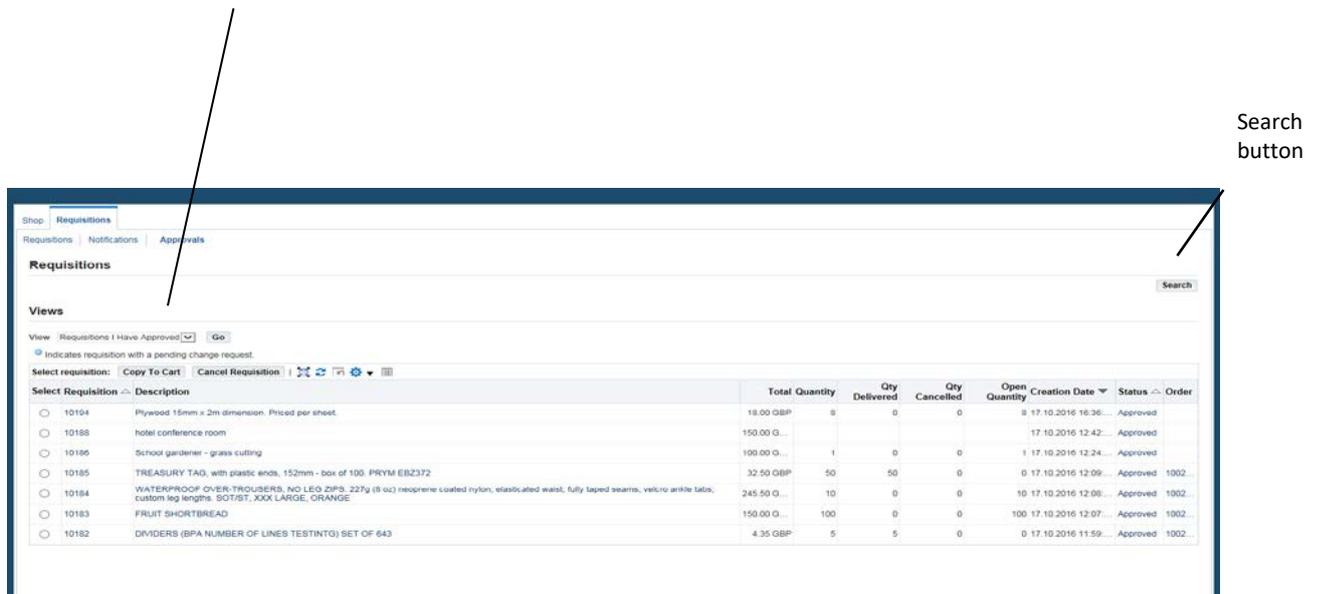
## 2.3 View Requisitions That You Have Approved

2.3.1 Click on to the EA iProcurement Approver responsibility.

2.3.2 To view the Requisition that you have Approved, click on the 'Approvals' link



2.3.3 Click on the arrow to the right of the View field, select 'Requisitions I Have Approved' and click 'Go'. The list of approved requisitions will be displayed below, including the Purchase Order number, and Quantity Delivered (populates once received).



2.3.4 The Purchase Order can be viewed by clicking on the 'Order' number hyperlink.

Qty cancelled	Open Quantity	Creation Date	Status	Order
0	8	17.10.2016 16:36:...	Approved	
		17.10.2016 12:42:...	Approved	
0	1	17.10.2016 12:24:...	Approved	
0	0	17.10.2016 12:09:...	Approved	1002...
0	10	17.10.2016 12:08:...	Approved	1002...
0	100	17.10.2016 12:07:...	Approved	1002...
0	0	17.10.2016 11:59:...	Approved	1002...

**Order Information**

General	Terms and Conditions	Summary
Total 1312.00 Supplier EXCITE PROMOTIONAL MERCHANDISE * Supplier Site LISBURN Supplier Contact EA, ORDERS Address 4 FERGUSON DRIVE KNOCKMORE HILL INDUSTRIAL ESTATE LISBURN, BT28 2EX Buyer JACKSON, Mrs SARAH Order Date 14.09.2016 16:04:01 Description Status Approved Note to Supplier Operating Unit Education Authority OU Supplier Order Number Attachments None	Payment Terms 30 Days Nett Carrier FOB Freight Terms Shipping Control <b>Ship-To Address</b> Address 64 OLD MOUNTFIELD ROAD OMAGH, BT79 7EG <b>Bill-To Address</b> Address Forestview Belfast	Total 1312.00 Received 1312.00 Invoiced 1312.00 Payment Status Paid

**PO Details**

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	Goods	40627-30	PROMOTIONAL ITEM 04060897 - STRESS PIG, Pink with Student Finance NI Logo and Web address. Priced Per Pack of 500		Pack	1	410	410.00	Closed		
2	Goods	40627-50	PROMOTIONAL ITEM 162408 - TELEPHONE MAGNET, Multi, with Student Finance NI Logo, Web address and Telephone number. Per Pack of 500		Pack	1	99	99.00	Closed		
3	Goods	40627-40	PROMOTIONAL ITEM 189364 - FLIP MOBILE PHONE HOLDER, Blue with Student Finance NI Logo, Web address and Telephone number. Priced Per Pack of 500		Pack	1	410	410.00	Closed		
4	Goods	40627-10	PROMOTIONAL ITEM 605312 - DUO HIGHLIGHTER, White with Student Finance NI Logo and Web address. Priced Per Pack of 500		Pack	1	279	279.00	Closed		

2.3.5 Further information can be viewed by clicking on the hyperlink numbers or description e.g. Invoice value link. Within iProcurement you can drill up and down through the transactions by clicking on the hyperlinks.

Shop Requisitions Receiving

Requisitions Notifications

Requisitions: Requisitions > Requisitions Search > View Order Details >

**Invoices for Standard Purchase Order: 100051** Export

Invoice	Invoice Date	Type	Supplier	Supplier Site	Currency	Amount	Due	Status	On Hold	Payment Status	Remit to Supplier	Remit to Supplier Site	Due Date	Payment	PO Number	Receipt	Attachments
PO2	20.09.2016	Standard	EXCITE PROMOTIONAL MERCHANDISE *	LISBURN	GBP	1574.40	0.00	Approved		Paid			20.10.2016	48	100051		

[Return to View Order Details](#)

Shop Requisitions Receiving

Requisitions Notifications

Requisitions: Requisitions > Requisitions Search > View Order Details > View Invoices >

**Standard Invoice: PO2 (Total GBP 1574.40)** Export

Currency: GBP

General	Amount Summary	Payment Information
Invoice Date 20.09.2016 Status Approved On Hold Batch KC PO 2nd Attachments None Supplier EXCITE PROMOTIONAL MERCHANDISE * Supplier Site LISBURN Address 4 FERGUSON DRIVE KNOCKMORE HILL INDUSTRIAL ESTATE LISBURN, BT28 2EX	Item 1312.00 Freight 0.00 Miscellaneous 0.00 Tax 262.40 Prepayment 0.00 Retainage 0.00 Withholding Tax 0.00 Total 1574.40	Paid 1574.40 Discount Taken 0.00 Due 0.00 Status Paid Payment Date 21.09.2016 Payment Term 30 Days Nett

Invoice Lines Scheduled Payments Hold Reasons

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	PROMOTIONAL ITEM 04060897 - STRESS PIG, Pink with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	410.00		410.00	0.00	Approved	100051	1	1	JACKSON, Mrs SARAH	
2	Item	PROMOTIONAL ITEM 162408 - TELEPHONE MAGNET, Multi, with Student Finance NI Logo, Web address and Telephone number. Per Pack of 500	1	Pack	99.00		99.00	0.00	Approved	100051	2	1	JACKSON, Mrs SARAH	
3	Item	PROMOTIONAL ITEM 189364 - FLIP MOBILE PHONE HOLDER, Blue with Student Finance NI Logo, Web address and Telephone number. Priced Per Pack of 500	1	Pack	410.00		410.00	0.00	Approved	100051	3	1	JACKSON, Mrs SARAH	
4	Item	PROMOTIONAL ITEM 605312 - DUO HIGHLIGHTER, White with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	279.00		279.00	0.00	Approved	100051	4	1	JACKSON, Mrs SARAH	
5	Item	PROMOTIONAL ITEMS 131457 - BALLPEN CONTOUR DIGITAL, White/Blue with Student Finance NI Logo and Web address. Priced Per Pack of 500	1	Pack	114.00		114.00	0.00	Approved	100051	5	1	JACKSON, Mrs SARAH	
6	Tax	UK-TAX - UK-VAT					262.40	0.00	Approved					

2.3.6 Alternatively the Search button can be used to Search for a Requisition that the Budget holder actioned. Enter search criteria and click 'Go'. The details will be displayed.

Shop | Requisitions | Notifications | Approvals

Requisitions: Approvals >

### Requisition Approvals Search

Enter search criteria and press the Go button to find the requisitions for approval. Views

Requisition Created By   Include people from all organizations

Requisition Created  Last 7 Days

Requisition Number

Order Number

Requester   Include people from all organizations

Requisition Status  All Statuses

Requisition Description

Supplier

Requisition	Description	Total	Quantity	Qty Delivered	Qty Cancelled	Open Quantity	Creation Date	Status	Order
No search conducted.									

## 2.4 Approve Via Email

2.4.1 An email will be sent to the Approver (budgetholder) when a requestor submits a requisition. The email will be displayed within the Approvers Education Authority email account (eani.org.uk or c2k).

2.4.2 The requisition details will be displayed within the email content, including requisition number, descriptions, full code combination, price and delivery location for each line, etc.

● Action Required: Action Required: There is an Oracle requisition no. 10197 awaiting your approval/rejection (2)

Workflow Mailer - EBSENV1 <ebseenv1@eani.org.uk> 3 Nov at 11:10 AM

To: CAMPBELL, LILY

This message contains blocked images. [Show Images](#) [Change this setting](#)

From: SMYTH, HEATHER  
 To: CAMPBELL, LILY  
 Sent: 03.11.2016 11:10:19  
 Due: 04.11.2016 11:10:19  
 ID: 28758

**Requisition Lines**

Line	Description	Supplier	Account Code	Unit	Quantity	Price (GBP)	Delivery Location
1	WHITEBOARD MARKERS, drywipe, wallet of 4 assorted colours - black, blue, red, green. WB EBZ769	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Pack	100	0.34	GIBSON PS MK
2	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, red - box of 12. 5 STAR 396802	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	150	0.9	GIBSON PS MK
3	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, blue - box of 12. 5 STAR 396799	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	110	0.9	GIBSON PS MK
4	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, black - box of 12. 5 STAR 396780	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	120	0.9	GIBSON PS MK

**For Email actions: Approve and Forward/Forward please login to Oracle.**

**Approval Sequence**

Image for document Image for approval path Image for approval path Image for approval path In Process

	CAMPBELL, Ms LILY		
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Num	Name	Action	Action Date	Note
1	SMYTH, Mrs HEATHER	Submitted	03.11.2016 11:10:19	
2	CAMPBELL, Ms LILY	Pending		

**Related Applications**

[Edit Requisition](#) [Edit Requisition](#)

[View Requisition Details](#) [View Requisition Details](#)

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Please click on one of the following choices to automatically generate an E-mail response. (Do Not Use the 'Forward' or 'Approve and Forward' Buttons). Please approve or reject this requisition. However, if you do not have the authority on the system to approve a requisition of this value, you must forward it by logging into Oracle. Please approve or reject this requisition.

Action: [Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Request Information](#)



2.4.3 The approval sequence will be displayed e.g. in this example Campbell, Ms Lily is the approver who has received this email to approve. If there is more than one approver in the sequence this will be displayed within the Approval Sequence section.

2.4.4 The requisition can be viewed within Oracle by clicking on the 'View Requisition Details' link. This will open the Oracle logon page and take you straight to the Requisition.

Shop Requisitions

Requisitions Notifications Approvals

### Requisition 10142

Description: LATERAL FILING CABINET, 1000(W) x 486(D) x 1981(H)mm, with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, available in coffee/cream, grey, black, blue, red or silver. GO AM78SOT

Created By: SMYTH, Mrs HEATHER

Creation Date: 06.10.2016 14:46:04

Deliver-To: 64 OLD MOUNTFIELD ROAD, OMAGH, Tyrone, BT79 7EG

Justification:

Status: In Process

Change History: No

Urgent Requisition: No

Attachment: None

Note to Buyer:

#### Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Qty Delivered	Qty Cancelled	Open Quantity	Price	Amount (GBP)	Details	Order
1	LATERAL FILING CABINET, 1000(W) x 486(D) x 1981(H)mm, with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, available in coffee/cream, grey, black, blue, red or silver. GO AM78SOT	07.10.2016 13:58...	GIBSON PS MK	Ea...	1	0.0		1	176.00	176.00		
2	DIVIDERS FOR SLOTTED SHELF (Item No.55) 5 dividers per shelf, pack of 5. AMVD7 BELFAST AND BALLYMENA AREA	07.10.2016 13:58...	GIBSON PS MK	Ea...	20	0.0		20	15.00	300.00		
3	UNDER SHELF LATERAL FILING for item No.50 lateral filing cabinet. Takes 270mm files. AMLFSS22 Available in med 270mm or large 330mm enter note of size in note to supplier	07.10.2016 13:58...	GIBSON PS MK	Ea...	53	0.0		53	20.00	1060.00		
4	1, 2 or 3 ROLL OUT SUSPENDED FILING FRAME WITH ANTI TILT DEVICE for item No.50 lateral filing cabinet. AMROF and AMR. It is recommended that the maximum number of roll out devices per cabinet is 3. note to supplier for size.	07.10.2016 13:58...	GIBSON PS MK	Ea...	20	0.0		20	55.00	1100.00		
<b>Total</b>										<b>2636.00</b>		

Return

2.4.5 After reviewing the details within the email, to approve click on the 'Approve' button.

2.4.6 An email opens, click 'Send'. This sends a message to Oracle to approve the requisition.

Action Required: Action Required: There is an Oracle requisition no. 10142 awaiting your approval/rejection - Message (HTML)

FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW

Cut Copy Paste Format Painter Clipboard Basic Text Names Attach File Attach Signature Follow Up High Importance Low Importance Zoom

To: ebslive@eani.org.uk

Cc:

Send Subject: Action Required: Action Required: There is an Oracle requisition no. 10142 awaiting your approval/rejection

Action: 'Approve'

If forwarding this document to another person, please enter their user-id below

Forward To: "

Note

Note: "

NID[27522/41366939757659800417669854766840790807@WFMAIL]

2.4.7 An email opens, click 'Send'. This sends a message to Oracle to approve the requisition.

## 2.5 Reject or Request Further Information Via Email

2.5.1 As indicated above an email will be sent to the Approver (budgetholder) when a requestor submits a requisition. The email will be displayed within the Approvers Education Authority email account (eani.org.uk or c2k).

2.5.2 Review the details within the Approval request.

• Action Required: Action Required: There is an Oracle requisition no. 10197 awaiting your approval/rejection (2)

• **Workflow Mailer - EBSENV1** <ebsenv1@eani.org.uk> 3 Nov at 11:10 AM

To CAMPBELL, LILY

This message contains blocked images. [Show Images](#) [Change this setting](#)

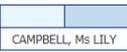
From SMYTH, HEATHER  
To CAMPBELL, LILY  
Sent 03.11.2016 11:10:19  
Due 04.11.2016 11:10:19  
ID 28758

**Requisition Lines**

Line	Description	Supplier	Account Code	Unit	Quantity	Price (GBP)	Delivery Location
1	WHITEBOARD MARKERS, drywipe, wallet of 4 assorted colours - black, blue, red, green. WB EB2769	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Pack	100	0.34	GIBSON PS MK
2	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, red - box of 12. 5 STAR 396802	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	150	0.9	GIBSON PS MK
3	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, blue - box of 12. 5 STAR 396799	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	110	0.9	GIBSON PS MK
4	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, black - box of 12. 5 STAR 396780	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	120	0.9	GIBSON PS MK

**For Email actions: Approve and Forward/Forward please login to Oracle.**

**Approval Sequence**

Image for document Image for approval path  Image for approval path Image for approval path In Process

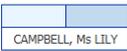
Num	Name	Action	Action Date	Note
1	SMYTH, Mrs HEATHER	Submitted	03.11.2016 11:10:19	
2	CAMPBELL, Ms LILY	Pending		

• Action Required: Action Required: There is an Oracle requisition no. 10197 awaiting your approval/rejection (2)

4	GEL INK PEN, medium point, tungsten carbide ball, self-clean, level-indicator, black - box of 12. 5 STAR 396780	EB ERSKINE & CO LTD *	01-74352-N-3605-00000-0000-0000-0000	Box	120	0.9	GIBSON PS MK
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**For Email actions: Approve and Forward/Forward please login to Oracle.**

**Approval Sequence**

Image for document Image for approval path  Image for approval path Image for approval path In Process

Num	Name	Action	Action Date	Note
1	SMYTH, Mrs HEATHER	Submitted	03.11.2016 11:10:19	
2	CAMPBELL, Ms LILY	Pending		

**Related Applications**

[Edit Requisition](#) [Edit Requisition](#)

[View Requisition Details](#) [View Requisition Details](#)

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Please click on one of the following choices to automatically generate an E-mail response. (Do Not Use the 'Forward' or 'Approve and Forward' Buttons).  
Please approve or reject this requisition. However, if you do not have the authority on the system to approve a requisition of this value, you must forward it by logging into Oracle.  
Please approve or reject this requisition.

Action: [Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Request Information](#)

  
Notificati...html

2.5.3 After reviewing the details within the email, to reject or request information click on the relevant button.

2.5.4 An email opens, within the ' ' enter a note indicating why the requisition is being rejected or the information requested e.g. Incorrect quantity entered in requisition.

