EDUCATION AUTHORITY

iProcurement Approver's User Guide

2019

Requisition/Order Queries: Tel. 028 9056 6499 or Email <u>procurement@eani.org.uk</u> System/Login Queries: Tel. 028 9056 6478 or Email <u>ifs.queries@eani.org.uk</u> iProcurement Accounts Queries: Helpdesk Tel. 028 9056 6233 or Email <u>accounts@eani.org.uk</u>

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.

ORACLE	
	llear Name
	Dassword
	Password
	Login Cancel
	Login Assistance
	Register here
	Accessibility
	None
	Language
	English

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]

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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

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> 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.

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

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Buyer	JACKSON, Mrs SARAH	OMAGH, BT79 7EG	
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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.

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2	Item	PROMOTIONAL ITEM 162408 - TELEPHONE MACRET, Multi, with Student Finance NI Logo, Web address and Telephone number. Per Pack of 500	r 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 Logor Web address and Telephone number. Priced Per Pack of 502	1 Pack	410.00	410.00	0.00	Approved	100051	3	1	JACKSON, Mrs SARAH	
4	Item	PROMOTIONAL ITEM 60F312 - 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 TEMS 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	Тах	UK TAX - UK-VAT			262.40	0.00	Approved					

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.

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	WHITE, VOHNATHAN	Requisiti	Purchase Requisition 10186 has been approved	17.10.20	
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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.

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- 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.

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Jime Description Supplier Account Code Unit Quantity Price (GBP) Delivery Location Plywood 15mm x.2m dimension. Priced per sheet. B MCCAFFREY & SONS LTD D1-20431-0-4501-00000-0000000000000000000000000	X2B0	• .									
Physical Sequence BMCCAFFREY & SONG LTD D1-20431-D-4501-00000-0000-0000 Each 8 2.25 EA TEST PILOT SOCHOOL Upproval Sequence Improval Sequence Improval Sequence Improval Sequence Improval Sequence Improval Sequence Improval Sequence Improval Sequence <th< td=""><td>Line Descrip</td><td>tion</td><td>Supplier</td><td></td><td>Account Code</td><td></td><td>Unit</td><td>Quantity P</td><td>rice (GBP) De</td><td>livery Locati</td><td>on</td></th<>	Line Descrip	tion	Supplier		Account Code		Unit	Quantity P	rice (GBP) De	livery Locati	on
Approval Sequence	1 Plywood	15mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	.TD	01-20431-D-4501-00000-0000-0000-00	00	Each	8	2.25 EA	TEST PILOT	SCHOOL
Related Applications	0	0									
Edit Requisition	₩₩4TE ₩ 2 10 Φ Num 1 2	MR JOHNATHAN In Process MR JOHNATHAN In Process Mane PRK, MR ROBERT WHITE, MR JOHNATHAN			Action Submitted Pending	Action Date 17.10.2016 16:37:40				N	lote
Were Remission Datas	Munte Num 1 2 Related Appl	MR JOHNATHAN MPiccess MR JOHNATHAN MR ROBERT WHITE, MR JOHNATHAN ications			Action Submitted Pending	Action Date 17.10.2016 10:37:40				N	lote
	Munite Martin Martin Munite Num 1 2 Related Appl B Edt Request	MR JOHNATHAN MPiccess MR JOHNATHAN MR ROBERT WHITE, MR JOHNATHAN lications			Action Submitted Pending	Action Date 17.10.2016 10:37:40				N	lote
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Related Applications	Related Appl	MR JOHNATIAN MR Process MR JOHNATIAN MR Mane PRACMAR ROBERT WHITE, MR JOHNATHAN Incations Recon Detais ed Applications			Action Submitted Pending	Action Date 17.10.2016 16:37.40				N	lote
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Related Applications	Relate Related Appl State Require Related Appl Edit Require Relate Relate	MR JOHNATIAN MR Process MR JOHNATIAN MR POPERT MR ROBERT WHITE, MR JOHNATHAN Iteations Edit Detais Edit Requisition			Action Submitted Pending	Action Date 17.10.2016 16:37.40				N	liote

- 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.

	Oracle requisition no. 1019	4 awaiting your approv	al/rejection	Approve	Approve And Forw	rard Forward Reject Request Inform
From PINK, ROBERT		Description Plywood 15	mm x 2m dimension. Prices per sheet			
To WHITE, JOHNATHAN Seed, 17:10:2016 16:37:40		Requisition Total 18.00 GBP				
Due 18.10.2016 16:37:40		Atlachments				
ID 26793						
Requisition Lines						
12 5 0 · 0			/			
Line Description	Su	pplier	Account Code	Unit	Quantity	Price (GBP) Delivery Location
1 Plywood 15mm x 2m dimension. Price	ed per sheet. B N	ICCAFFREY & SONS LTD	01-20431-D-4501-00000-0000-	0000-0000 Each	0	2.25 EA TEST PILOT SCHOOL
Approval Sequence			/			
		/	/			
WHITE MR JOHNATHAN	 In Process 					
X250.						
Num Name		/	Action	Action Date		Note
2 WHITE MR JOHNAT	HAN		Pendina	17.10.2016 16:37.40		
		_/				
Edit Requisition						
View Requisition Details						
Response						
		/				
Forward To All Employe	es and Users	∃ ¢				
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Related Applications	2 <u>2</u>					() 다 여 ⁴ 1월 22 박 9 년 48 18 19
Related Applications						●日本美 <u>新</u> 公司口 (1)
Related Applications						9 대 세 해 <u>8</u> 운 후 9 4 <u>4</u> 8 8
Related Applications	02 2					· · · · · · · · · · · · · · · · · · ·
Related Applications						() 다 여 전 월 값 후 의 4 <u>6</u> 88 <u>8</u>
Related Applications						■ ☆ 4 ♥ 3 ₩ 2 ♥ 4 ☆ ■
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Related Applications Edit Requisition Construction Details Response Forward No	To All Employees and User	s V		3 Q		
Related Applications Edit Requisition Vyw Requisition Details Response Forward No	To All Employees and User	s V		3 Q		
Related Applications Edit Requisition Uview Requisition Details Response Forward No	To All Employees and User	s V		<u>Р к</u>		
Related Applications Edit Requisition Uview Requisition Details Response Forward' No	To All Employees and User	s		3 Q		

duties).
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.

	ch an	d Select: User o	r Role		Cancel Sele
Searc	h				
Search Resul	h By Na ts	ame 🗸 smith	Go		
Select	Quick Select	Name	User Name	Email	
Select	Quick Select	Name SMITH, JANE	User Name 12345780	Email ifsteamtest@gmail.com	

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': Al Requesto plan to cli Informati	ternatively a message to t r can be entered here if yc ck 'Reject' or Request on' button
VINTE, MR JOHNATHAN In Process VINTE, MR JOHNATHAN VINTE, MR ROBERT VINTE, MR JOHNATHAN	Action Submitted Pending	Action Date 17.19.2 16 16:27.40	Note
Related Applications Control Response Forward To Note Requisiton requires your review prior to your approval	a 0		

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.

juisitions Notifications	Approvals.			
ew Open Notifications	Go			
elect Notifications: Open	Delegate Close	1 2 6 0 • 0		
elect All Select None				
elect From 🗠	Туре 🗠	Subject 🗠	Sent 🔻	Due 🗠
PINK, ROBERT	Requisition	Action Required: There is an Oracle requisition no. 10192 awaiting your approval/rejection	17.10.2016	18.10.2016

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.

Shop Requisitions					
stores	(1971)				
search Main Store	60				
Stores					Shopping Cart
					Very cart is apply
My Requisitions				Full List	Purchasing News Check frequently asked questions Review purchasing policies EDUCATION AUTHORITY PROCUREMEN
1 2 5 Q . III					Welcome to the Education Authority
	Description	Total (GRP) Status	Change	Express Receive	Procurement Catalogue
Requisition		four foor / andua	change	Express recerre	
Requisition No results found.					Please check if the item you require is within the Stores before raining a Non Catalogue requisitions. Non Catalogue requisitions require you to receive three quotations from suppliers prior to raising the order.

2.2.3 Click on Notifications to view Requisitions requiring Approval.

Approvals							
Go							
nding change request.							
Description	Total	Quantity	Qty Delivered	Qty Cancelled	Open Quantity Creation Date	Status	Order
	Accrovals	Accrovals	Accrovals	Approvals	Approvals	Approvals	Approvals

2.2.4 A list of notifications will be displayed.

	e Approvais			
ew Open Notifications	♥ Go			
Select Notifications: Op	en Delegate Close	X 2 3 ☆ • ■		
Select All Select None				
B	Tuna	Subject 🗠	Sent 🐨	Due 🗠
Select From A	i the w			
	Requisition	Action Required. There is an Oracle requisition no. 10194 awaiting your approval/rejection	17.10.2016	18.10.2016

- 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.

	Notifications Approvals									
equisition	s: Notifications >									
ction	Required: There is an Oracle requisiti	ion no. 10194 awaiting you	r approval/r	ejection	Appr	Approve A	nd 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									
Requisit	tion Lines									
H a l	5 0 - 11									
Line D	escription	Supplier		Account Code	Ur	it Quanti	ty Pr	ice (GBP) De	livery Loc	ation
pprova	lywood 15mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	TD	01-29431-D-4501-00000-0000-0000-0000	Ea	h	0	2.25 EA	TEST PILC	ST SCHOOL
pprova	Went E, MR JCHNATHAN	B MCCAFFREY & SONS L	TD	81-29431-8-4591-80000-8000-8000-8000	E:	h	0	2.25 EA	TEST PILC	37 SCHOOL
pprova	www.od.tismm.x.2m.dimension.Priced.per sheet. al Sequence WHITE, MR JCHNATHAN In Process In Process	B MCCAFFREY & SONS L	TD	01-20431-0-4501-00000-0000-0000-0000	E.	h	0	2.25 EA	TEST PILC	37 SCHOOL
Approva 	wwood t5mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	TD	01-20431-0-4501-00000-0000-0000-0000 Action	Ea Action Date	h	8	2.25 E4	TEST PILC	Note
Approva a→ M æ i Num	wwood t5mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	TD	01-20431-D-4501-00000-0000-0000-0000 Action Sutembed	Ea Action Date 17.10.2016 16.37.40	h	8	2.25 E4	TEST PILC	Note
Approva	Wwood timm x 2m dimension. Priced per sheet. Sequence WHITE, MR JCHNATHAN New Process No Name Process WHITE, MR JCHNATHAN	B MCCAFFREY & SONS L	TD	01-20431-D-4501-00000-0000-0000-0000 Action Sutemitted Pending	Ea Action Date 17.10.2016 16.37.40	h	0	2.25 E4	TEST PILC	Note
Approva	wwood t5mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	TD	01-20431-D-4501-00000-0000-0000-0000 Action Submitted Pending	Ea Action Date 17.10.2016 16.37.40	,h	0	225 EA	TEST PILO	Note
Approva	Al Sequence Seq	B MCCAFFREY & SONS L	TD	01-20431-0-4501-00000-0000-0000-0000 Action Submitted Pending	Ea Action Date 17.10.2016 16.37.40	,h	0	225 [4	TEST PILO	Note
Approva	ywood t5mm x 2m dimension. Priced per sheet. al Sequence www.ret_MR JOHNATHAN None PINK, MR ROBERT WHITE, MR JOHNATHAN Applications Regulation	B MCCAFFREY & SONS L	TD	91-20431-10-4501-00000-0000-0000-0000 Action Submitted Panding	Ea Action Date 17.10.2016 16.37.40	h	0	2 25 EA	TEST PILO	Note
Approva	hywood t5mm x 2m dimension. Priced per sheet.	B MCCAFFREY & SONS L	TD	01-20431-D-4501-00000-0000-0000-0000 Action Submitted Pending	Ea Action Date 17.10.2016 16.37.40	h	0	225 [4	TEST PILO	Note
Approva	ywood t5mm x 2m dimension. Priced per sheet. al Sequence WHITE, MR JOHNATHAN manual for the Process manual for the Proces	B MCCAFFREY & SONS L	TD	01-20431-0-4501-00000-0000-0000-0000 Action Submitted Pending	Ea Action Date 17.10.2016 16.37.40	h	0	225 04	TEST PILO	Note

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

shop Requisions								
Requisitions A	pprovals							
Requisitions								
								Sea
Views								
	✓ Go							
View _								
View Indicates requisition with a per-	ding change request.							
View _ [©] Indicates requisition with a per ⊠ ☎ ☞ ☆ ➡ Ⅲ	iding change request.							
View _ [●] Indicates requisition with a per 対 ♂ ○ ◆ ◆ Ⅲ Select Requisition	ding change request.	Total	Quantity	Ob Delivered	Oty Cancelled	Onen Quantity Creation Date	Status	0.

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 receipted).

iop 1	Requisitions								
iquisió	ions Notifica	Sons Apprivals							1
Barren	uisitions								
redu									
requ									Search
View	5								Search
View	S Requisitions I	Have Approved 🗹 🚱							Search
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View View Ind Select	s Requisitions I licates requisition: t Requisition:	tare Approved © Ge n with a peoring bronge request. Copy To Cart Canor Requisition 1 元 2 □ 1 0 0 + 10 A Description	Total Q	uantity	City Delivered	Qty Cancelled	Open Creation Date 👻	Status A	Search
View View Ind Select Select	S Requisitions I licates requisiti t requisition: t Requisition 10104	Have Approved 🕑 🔞 🙃 In with a pending change request. Copy fo Carl Cancel Requestion 1 💢 🌮 🕅 🕹 🕶 🔟 Obscription Pyrevod 15mm x 2m dimension. Priced per sinest.	Total Q	uantity	Qty Delivered 0	Qty Cancelled 0	Open Creation Date ▼ Guantity Creation Date ■ 8 17.10.2016 16.36	Status A	Search
/iew new Ind Select	S Requisitions I licates requisition t Requisition 10194 10188	Have Approved ◯	Total Q 18.00 GBP 150.00 G	uantity 8	Qty Delivered 0	Qty Cancelled 0	Open Creation Date ▼ B 17.10.2016 16.36 17.10.2016 12.42	Status A Approved	Search
View View O Ind Select Select O	S Requisitions (licates requisition requisition: t Requisition 10104 10188 10106	tave Approved	Total Q 18.00 GBP 150.00 G 100.00 G	uantity 8	Qty Delivered 0	Qty Cancelled 0	Open Quantity Creation Date ♥ ■ 17.10.2016 16.36 17.10.2016 12.42 1.17.10.2016 12.42	Status A Approved Approved	Search
/iew /iew /iew /iew /iew Select Select O O O	Requisitions (licates requisition: requisition: 10104 10188 10186 10185	Itaxe Approved Comporequest. Copy To Cart Cancel Requisition 1 2 2 7 10 2 10 10 10 10 10 10 10 10 10 10 10 10 10	Total Q 10.00 QBP 150.00 Q 100.00 Q 32 50 QBP	uantity 0 1 50	Qty Delivered 0 0 50	Cancelled 0 0	Open Guantity Creation Date ▼ 8 17 10.2016 19.30 17 10.2016 12.42 1 17 10.2016 12.94 0 17 10.2016 12.94	Status A Approved Approved Approved	Order
View view o Ind Select Select O O O O O	S Requisitions I locates requisitions C Requisitions 10104 10188 10185 10185 10184	tave Approved	Total Q 10.00 GBP 150.00 G 100.00 G 32 50 GBP 245 50 G	uantity s 1 50 10	Oty Delivered 0 50 0	Cancelled 0 0 0	Open Creation Date ▼ ■ 17 10.3016 10.30 17 10.3016 12.42 1 17 10.3016 12.43 10 17 10.3016 12.06 10 17 10.3016 12.06	Status Approved Approved Approved Approved Approved	Order
View view o ind Select Select O O O O O O	5 Requisitions 1 icates requisition: 7 Requisition 10104 10188 10185 10185 10184 10183	Have Aperoved Gen Have Aperoved Gen Have Apero	Total Q 18.00 GBP 150.00 G 100.00 G 22.50 GBP 245.50 G 150.00 G	uantity 8 1 50 10	Oty Delivered 0 50 0	Cancelled 0 0 0 0 0 0	Open Creation Date ▼ Cuantity Creation Date ▼ 8 17:10.2016 12:42 117:10.2016 12:42 117:10.2016 12:42 10:17:10.2016 12:08 100:17:10.2016 12:08	Status Approved Approved Approved Approved Approved Approved	Order 1002 1002

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

Qty ancelled	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

																/= GBP	urrenc
															mation	Inform	rder
									1312.00	Summary Total	5	Terms and Condition				ral	Gene
									1312.00 1312.00 Faid	Received Invoiced Payment Status	0 Days Nett	Payment Terms 3 Carrier EOR	IOTIONAL E *	1312.00 EXCITE PROM MERCHANDIS	Total Supplier		
												Freight Terms Shipping Control	DRIVE	LISBURN EA, ORDERS 4 FERGUSON	Supplier Site upplier Contact Address	54	
												Ship-To Address	HILL INDUSTRIAL	KNOCKMORE ESTATE			
											ITT9 TEG	Bill-To Address	5 28A 1 SARAH 04:01	JACKSON, Mr 14.09.2016 16:	Buyer Order Date		
												Address Forestview Belfast,		Approved	Status lote to Supplier	N	
													any ou	None	Order Number Attachments	Supplier	
																talls	O De
															Luide At Petale	Details	
tachments F	tachm	ttachr	is Ai	Status	ount	e An	ty Pri-	UOM (em Description	ob Supplier It	Type Item/J	Line .	etails
			10	Closed	10.00	10 4	1 4	Pack		Per Pack of 500	udent Finance NI Logo and Web address. Pr	04060857 - STRESS PIG, Pink with St	PROMOTIONAL ITEM	40627-30	Goods	1	Þ.
			d	Closed	99.00	19	1	Pack	500	Telephone number. Per Pack of	5, with Student Finance NI Logo, Web addres	162408 - TELEPHONE MAGNET, MU	PROMOTIONAL ITEM	40627-50	Goods	2	Þ
			đ	Closed	10.00 (10 4	1 4	Pack	ed Per Pack of 500	ress and Telephone number. Price	ER, Blue with Student Finance NI Logo, Wet	189364 - FLIP MOBILE PHONE HOLD	PROMOTIONAL ITEM	40627-40	Goods	3	Þ
			31	(Terres of	70.00	n i	1 2	Park		triced Per Pack of 500	with Student Einabre NI Loop and Web addre	605312 - DUO HIGH IGHTER WIM	PROMOTIONAL ITEM	40627-10	GAASE		
								P-28C R		TRANT PER PARK OF 16.83	ANTE ACCOUNTS FOR ANY PRIME FOR A PARTY APPENDING	PERCENT A CONTRACT OF A CONTRACT	PPROPRIATE STORE TEP N	MARK C 110			

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.

p Req	uisitions	Receiving											
quisition	ns N	lotifications											
uisition	s: Requis	sitions > Requisitions Search > View Order Details >											
voice	s for s	Standard Purchase Order: 100051											Exp
12													
voice -	Invoic	ce Date Type Supplier	Supplier Site Currency Amount Due Stat	us On Ho	ld Paym	ent Status	Remit-to Supp	lier Remit-to Sup	oplier Site	Due Date	Payment P	O Number Recei	pt Attachm
22	20.09.2	2016 Standard EXCITE PROMOTIONAL MERCHANDISE	LISBURN GBP 1574.40 0.00 Appr	oved	Paid					20.10.2016	5 48 1	00051	
itum to V	iew Orde	r Details											
Req	uisitions	Receiving											
quisition	ns N	otifications											
n isitinn	e Domie	ethne a Danijetine Saarh a Viaw Order Datalis a Viaw Invi	705 b										
anda	rd Inv	voice: PO2 (Total GBP 1574.40)											Expo
rencya	GBP												
			8111122000					Paymer	nt Informa	tion			
eneral			Amount Summa	ry					Paid	1574.40			
Invoid	ce Date	20.09.2016	Item	1312.00				Discou	Int Taken	0.00			
	Status	Approved	Freight	0.00					Status i	Paid			
G	Batch	KC PO 2nd	Miscenaneous	262.40 (1)				Paym	nent Date	21.09.2016	ł.		
Attact	hments	None	Prepayment	0.00					Payment	48			
s	upplier	EXCITE PROMOTIONAL MERCHANDISE *	Retainage	0.00					1erm -	30 Days Ne	80		
Suppl	ier Site	LISBURN	Withholding Tax	0.00									
A	ddress	4 FERGUSON DRIVE	Total	1574.40									
		LISBURN, BT28 2EX											
nvoice L	ines	Scheduled Payments Hold Reasons											
H S													
Line 🔺	Type -	Description		Qty UOM	Price	Tax Included	Amount - R	etainage Status -	PO Number	PO	PO Shipment	Buyer	Receipt
1	Item	PROMOTIONAL ITEM 04060857 - STRESS PIG, Pink with Stud Pack of 500	ent Finance NI Logo and Web address. Priced Per	1 Pack	410.00		410.00	0.00 Approved	100051	1	1	JACKSON, Mrs SARAH	
2	Item	PROMOTIONAL ITEM 162408 - TELEPHONE MAGNET, Multi, Telephone number. Per Pack of 500	with Student Finance NI Logo, Web address and	1 Pack	99.00		99.00	0.00 Approved	100051	2	1	JACKSON, MIS SARAH	
3	item	PROMOTIONAL ITEM 189354 - FLIP MOBILE PHONE HOLDE and Telephone number. Priced Per Pack of 500	K Blue with Student Finance NI Logo, Web address	1 Pack	410.00		410.00	0.00 Approved	100051	3	1	JACKSON, Mrs SARAH	
4	ltem	PROMOTIONAL ITEM 605312 - DUO HIGHLIGHTER, White wit Per Pack of 500	n Student Finance NI Logo and Web address. Priced	1 Pack	279.00		279.00	0.00 Approved	100051	4	1	JACKSON, Mrs SARAH	
		PROMOTIONAL ITEMS 131457 - BALLPEN CONTOUR DIGITA	L, White/Blue with Student Finance NI Logo and Web	1 Park	114.00		114.00	0.00 Anterward	100051	5	1	JACKSON, Mrs	
5	item	address. Priced Per Pack of 500		11.000	114.00		114.99	a.ea ripprorea	199991			SARAH	

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.



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.

This m From S To C Sent C Due C	nessage con SMYTH, HE CAMPBELL, 03.11.2016 04.11.2016	tains blocked images. Show Images ATHER LILY 11:10:19 11:10:19	Change this setting						
Requ	Jisition	Lines	/	Supplier	Account Code	Unit	Quantity	Price	Delivery
1	WHITEBO	ARD MARKERS, drywipe, wallet of	4 assorted colours - black,	EB ERSKINE & CO	01-74352-N-3605-00000-	Pack	100	(GBP) 0.34	GIBSON PS MK
2	GEL INK P	green. WB EB2769 EN, medium point, tungsten carbid red - box of 12, 5 STAR 396802	le ball, self-clean, level-	EB ERSKINE & CO	01-74352-N-3605-0000- 0000-0000-0000	Box	150	0.9	GIBSON PS MK
3	GEL INK P	EN, medium point, tungsten carbid blue - box of 12, 5 STAR 396799	le ball, self-clean, level-	EB ERSKINE & CO	01-74352-N-3605-00000- 0000-0000-0000	Box	110	0.9	GIBSON PS MK
4	GEL INK P	EN, medium point, tungsten carbid	le ball, self-clean, level-	EB ERSKINE & CO	01-74352-N-3605-00000- 0000-0000-0000	Box	120	0.9	GIBSON PS MK
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- 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.

Requisition 10142	a Approvais									
Details	Description Created By Creation Date Deliver:To Justification	LATERAL FILING CABINET, 1000(W) × 486(d) × 1981(h)mm, with two sole tambour plastic blutters, no internal fittings, locitable with 2 lens, available in colleversam, gave, take, take nee or silver. 30 AM783OT SW/TH, Mai HarATHER 06:10:2016 14:46;04 64 OLD MOUNTFIELD ROAD OMAGH, Tyrone, 61779 7EG			Change F Urgent Requ Attac Note to	Status In Process listory No isition No himent <u>None</u> Buyer				
11 2 18 Q • III										
			Need-By	Deliver-To	Unit Quantity	Qty Qty Delivered Cancelled	Open Quantity	Price	Amount (GBP)	Details Orde
Line Description								176.0	178.00	
Line Description LATERAL FILING CABI LATERAL FILING CABI	NET, 1000(W) x 486(d) x 1981(h)mm n, grey, black, blue, red or silver. GO	with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, AM78SOT	07.10.2016 13:58	GIBSON PS MK	Ea 1	0.0				
Line Description LATERAL FILING CABI Available in coffeercrean DIVIDERS FOR SLOTT	NET, 1000(W) x 488(d) x 1981(h)mm n, grey, black, blue, red or silver. GO ED SHELF (item No.55) 5 dividers pr	with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, MI78SOT r shelf, pack of 5. AMVD7 BELFAST AND BALLYMENA AREA	07.10.2016 13:58 07.10.2016 13:58	GIBSON PS MK GIBSON PS MK	Ea 1 Ea 20	0.0	20	15 GBP	300.00	
Line Description LATERAL FILING CABI available in coffeecrean DIVIDERS FOR SLOTT UNDER SHELF LATER enter note of size in note	NET, 1000(W) x 488(d) x 1981(h)mm n, grey, black, blue, red or silver. GO ED SHELF (item No.55) 5 dividers pr AL FILING for Item No.50 tateral filing to suppler	with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, MAT8907 sheft, pack of 5. AMVD7 BELFAST AND BALLYMENA AREA cabinet. Takes 270mm files. AMLFSS22 Available in med 270mm or large 330m	07.10.2016.13:58 07.10.2016.13:58 07.10.2016.13:58	GIBSON PS MK GIBSON PS MK GIBSON PS MK	Ea 1 Ea 20 Ea 53	00	20	15 GBP 20 GBP	300.00	8
Line Description LATERAL FILING CABI available in coffee/crean DIVIDERS FOR SLOTT UNDER SHELF LATER enter note of size in note recommended that the n	NET, 1000(W) x 485(d) x 1991(h)mm h, gray, black, blue, red or silver, GO ED SHELF (item No.55) 5 dividers pr AL FILING for item No.50 lateral filing to supplier SPENDED FILING FRAME WITH AN assimum number of foil out devices p	with two side tambour plastic shutters, no internal fittings, lockable with 2 keys, MAYSSOT sinel, pack of 5. AAV\D7 BELFAST AND BALLYMENA AREA cabinet. Takes 270mm files. AMLFSS22 Available in med 270mm or large 330m T1 TLT_DFVCE for them Na 50 users filing cabinet. AMROF and AMB. It is or cabinet 3. A net outpelfor thesis.	07.10.2016 13.58 07.10.2016 13.58 07.10.2016 13.58 07.10.2016 13.58	GIBSON PS MK GIBSON PS MK GIBSON PS MK GIBSON PS MK	Ea 1 Ea 20 Ea 53 Ea 20	00	20 53 20	15 GBP 20 GBP 55 GBP	300.00 1060.00 1100.00	

- 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.

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Action: 'Approve' If forwarding this docum below Forward To: '' Note Note: ''	ent to another person, please enter their user-id
NID[27522/41366939757	659800417669854766840790807@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.

This message conta rom SMYTH, HEA' To CAMPBELL, L Sent 03.11.2016 1 Due 04.11.2016 1 ID 28758 Cequisition L Line Description WHITEBOAR	Ins blocked images. Show Images Change this setting THER ILY 1:10:19 1:10:19						
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- 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.

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- 2.5.5 Click 'Send'. This sends a message to Oracle to reject or return the requisition to the user requesting information regarding the requisition. In addition an email is sent to the requestor detailing the reject or requesting information along with the note.
- 2.5.6 The requestor will take action on the notification within iProcurement e.g. amend, cancel or reply to the approver and resubmit for approval.