SHARED SERVICES CENTRE
RESEARCH COUNCILS UK

Purchasing using Oracle iProcurement

Oracle R12

Arts & Humanities Research Council
BBSRC bioscience for the future
EPSRC Pioneering research and skills
E·S·R·C Economic & Social Research Council
MRC Medical Research Council
NATURAL ENVIRONMENT RESEARCH COUNCIL
Science & Technology Facilities Council

What is the RCUK SSC Ltd all about?

Why have a Shared Services Centre?

The Research Councils have established a Shared Services Centre (SSC) based in Swindon, offering services in Human Resources (HR), Finance, Procurement, IT and Grants processing to the Research Councils and their Institutes.

Jointly owned by the Research Councils, the SSC is governed by a Board of Directors made up of representatives from all seven Research Councils. The focus for us is on customer service. When fully functional we will employ around 600 people. Many of these are being transferred from the Research Councils, bringing complementary skills and knowledge of the customers who will be using the new Shared Services Centre.

By adopting shared services the Research Councils make financial savings for investing back into research, but also increase their operational efficiency. The main objective of the SSC is releasing £450m to front line, world class research over the next 10 years.

The SSC began providing services to the Research Councils from mid 2008. Roll out across the remaining Research Councils continues in 2009 and early 2010.

What we do

Our services include Human Resources, Payroll, Finance, Procurement, IT and Grants administration.

HR and Payroll	Finance	Procurement	Grants	Information Systems
Starting work	Record to reporting	Category management	Receive and check proposals	Incident management
At work	Order to cash	Strategic sourcing	Peer review arrangements	Availability
Increasing capability	Purchase to pay	Supplier performance & relationship Management regional customer account management	Applications processing	Change / release management
Attendance	Invest to refresh (Assets)	Business performance management	Post award management	Security management
Reward and recognition	Performance management	Procurement policy	Payment profiles	Application management
Leaving work	Project management	Procurement strategy		
HR strategy and employment framework	Cash management	E-Procurement		
Payroll				
Management information and reporting				
Process management and continuous improvement				

While all of these services are being underpinned by technology, considerable emphasis is on individuals managing their own information. This is supported by professional, customer focused teams, as well as qualified specialists dealing with all issues and activities requiring a human touch.

The way we do things – our vision and values

We're ensuring that our vision and values are embedded in the way we do business, the way our employees work and in the way we treat others.

Our vision *– professional people working together to deliver quality services for the benefit of the research community.*

But what does this mean in practice?

Professional people working together - the SSC is discovering and developing ways its people can work as teams by sharing knowledge. At the SSC the word professional describes the way people work.

Deliver quality services – delivering quality services is crucial to support the Research Councils. Quality cannot be compromised as the consequences of failure could be far-reaching, such as supplies not reaching a base in remote or hostile environments.

For the benefit of the research community - a key driver for establishing the SSC is delivering increased benefit to research. Some benefits will derive from savings made through combining resource in one place, while others will come from sharing best practice and working together.

SSC values

Flexibility – taking on new tasks and responsibilities by being adaptable, willing and always keen to try something new. Achieving the goal by modifying approach or style.

Service excellence - providing a courteous and professional service and consistently striving for excellent service delivery.

Valuing self and others - recognising the contributions of others, dealing with people honestly, dignity and fairness. Value diversity.

Empowerment and accountability - Involving others effectively and giving them responsibility to achieve specific goals whilst providing coaching and advice. Involving people in decisions and thereby obtaining their commitment.

Positive engagement - acting on own initiative, and demonstrating energy and determination to achieve results.

The SSC provide various publications to keep employees up to date with what is ongoing on around the business. This includes Catalyst and SSC News update, both of which can be found on the SSC intranet. A monthly team brief is also presented to each department.

About this Guide

How to use this Guide

This guide explains how to enter data, query data and navigate within the Oracle Application.

Text Formatting and Abbreviations

Bold blue text represents an item that needs to be selected.
Bold red text represents a value that needs to be entered.

Notes about a topic are presented inside grey boxes.

Best Practice

Users can help to ensure that the system operates to the highest performance levels at all times by adhering to the following:

- Do NOT leave an action or a process waiting for a User response
- Close the form when you have finished an action or process
- Close your session when leaving your PC
- Logout of Oracle when you have completed your tasks
- Always use the correct logout routine – never just switch off the PC
- Fewer open applications on your PC will help to improve system performance

Data

All data used is purely for training purposes and will not affect the live system. Any changes will not be reflected in the live system.

iProcurement Hints and Tips

- To view how much VAT will be added to your requisition click on “Next” twice on the Checkout screen before you click on “Submit”.

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Purchasing using Oracle iProcurement

iProcurement is a simple portal that is used by the Research Councils and the SSC to order goods and services.

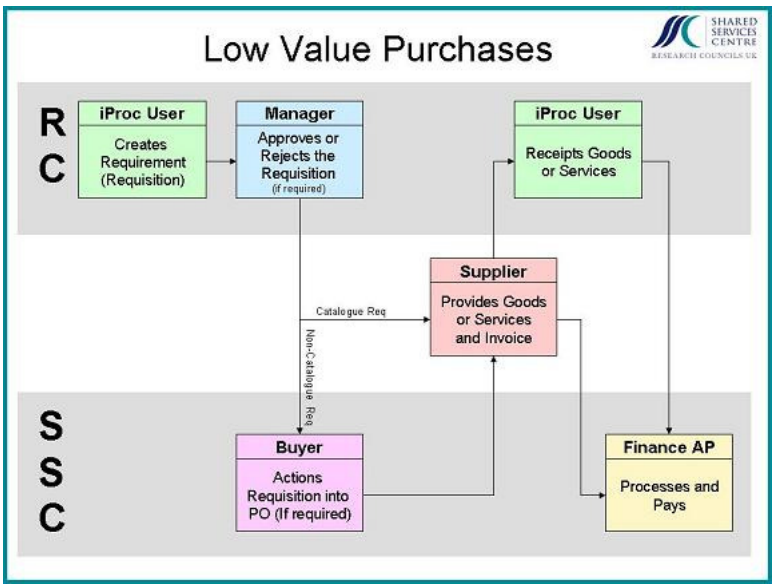
How to Buy

Goods
In Oracle goods can be ordered using the Science Warehouse catalogues. It is the simplest way to order and it is the first type of order that we create.

Services
In Oracle you will be able to order services through “Smart Forms”. Smart Forms are designed to guide you through the purchasing process to ensure the supplier is given sufficient information.

Large or Specialised Items
Any items that cannot be ordered through the Science Warehouse catalogues or Smart Forms can be put through as a non-catalogue request. All non-catalogue requests will be picked up by a buyer in the SSC and actioned.

How it Works



This is a simplified diagram to show how Oracle deals with your order.

1. It all starts with you creating a requisition in Oracle.

2. Depending on your council your manager may need to approve your requisition before it goes to the supplier or a buyer.

3. If you use a catalogue or a smart form a purchase order will be created automatically and your order will go out to the supplier.

   If you used a non-catalogue request your requisition will go to a buyer first who will either create a purchase order or a tender.

4. The supplier supplies the goods or services

5. Your receipt the goods or services in Oracle

6. Finance processes and pays the suppliers invoice

1. Requisitioning

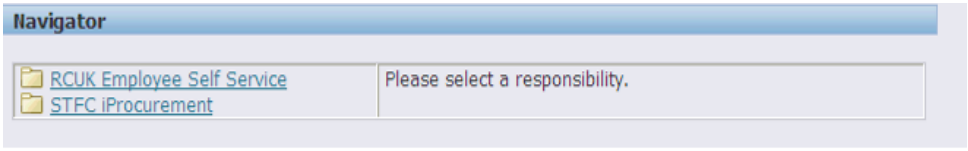
A requisition is an internal requirement document for goods or services. Once processed these documents will generate purchase order numbers which are then sent to the suppliers.

There are several types of requisitions in Oracle. They are:

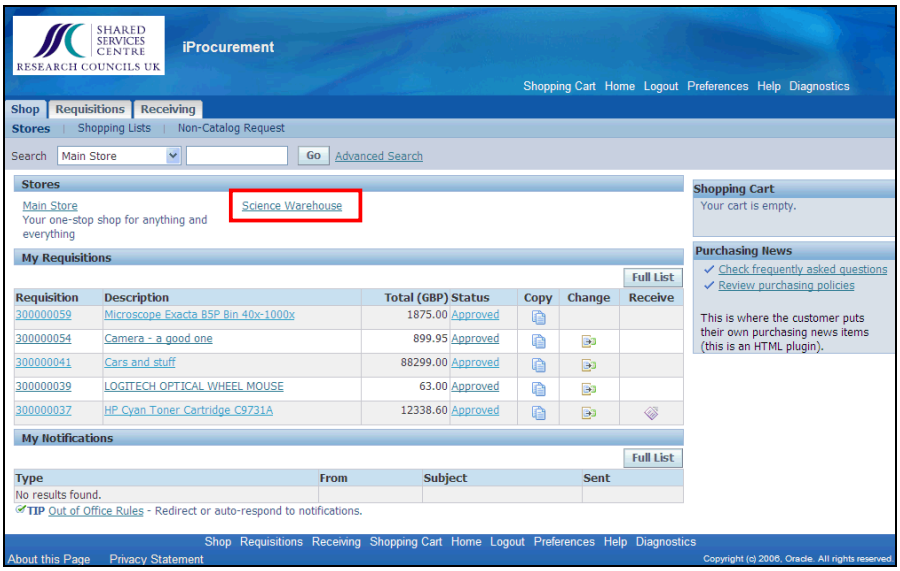
- Catalogue Requisitions
- Smart Form Requisitions
- Non-Catalogue or Free-Text Requisitions

1.1 Science Warehouse Catalogue Requisition

In this example we use Science Warehouse to order a laptop case.



1. Click the **STFC iProcurement** link.

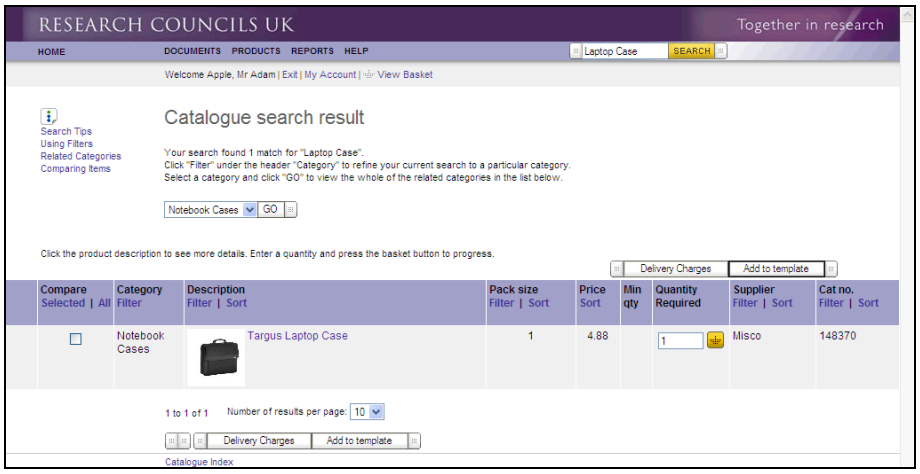


2. Click the **Science Warehouse** link under **Stores**.

3. Click in the **Search Catalogue** field.

4. Enter the required information into the **Search Catalogue** field. Enter a valid value e.g. "**Laptop Case**".

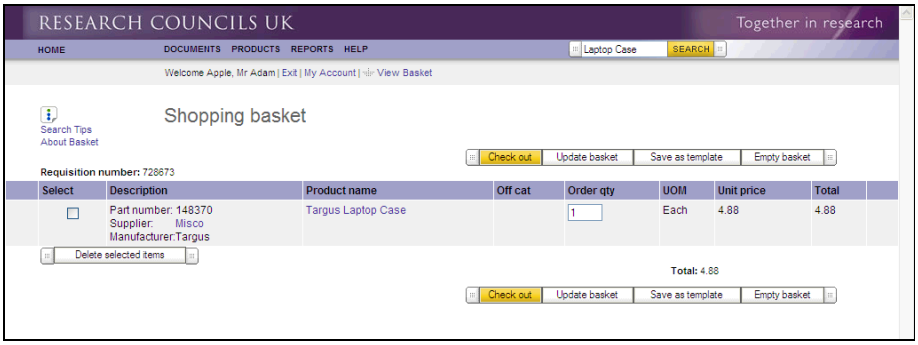
5. Click the SEARCH button.



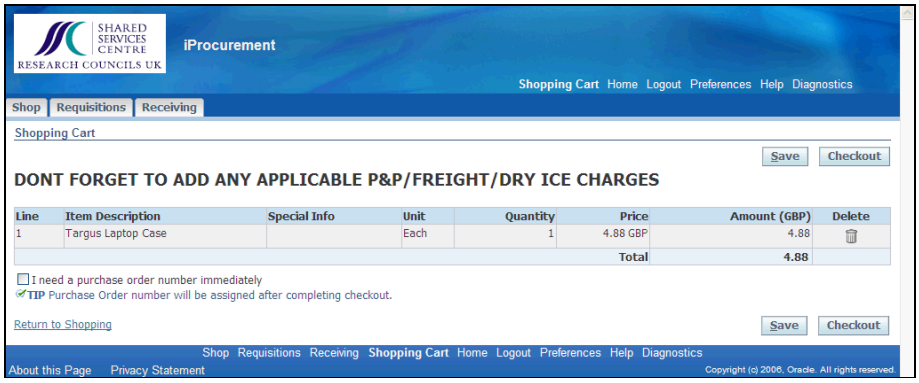
6. Click in the **Quantity Required** field.

7. Enter the required information into the **Quantity Required** field. Enter a valid value e.g. "**1**".

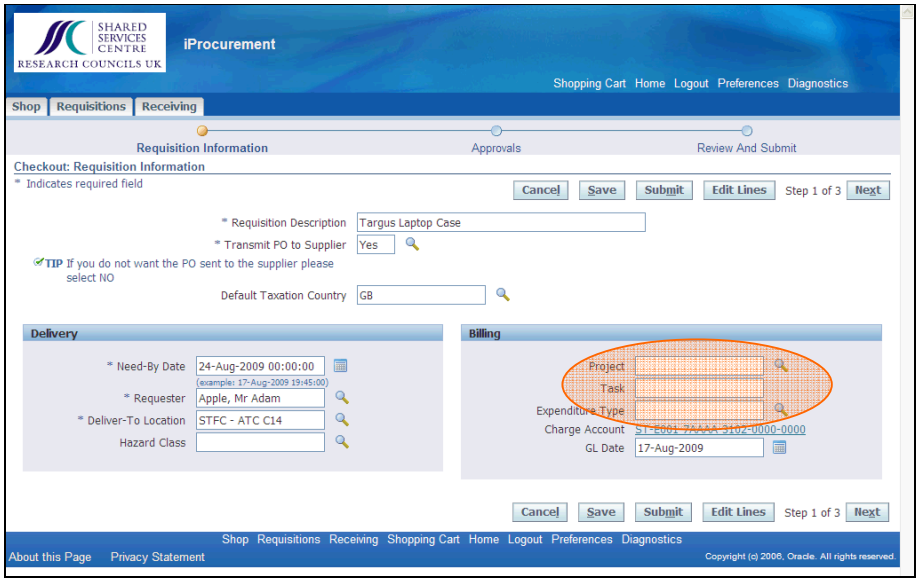
8. Click the **Add to Cart** button.



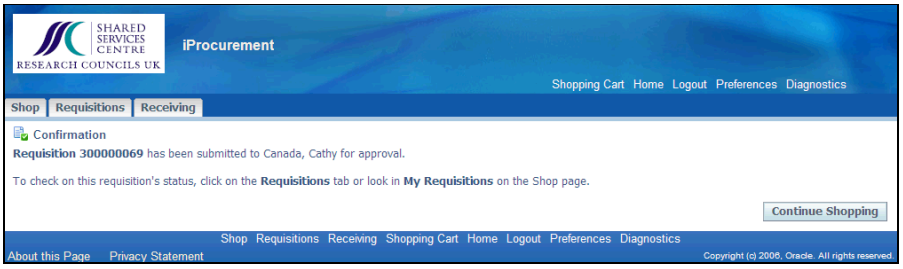
9. Click the Check out button.



10. Click the Checkout button.



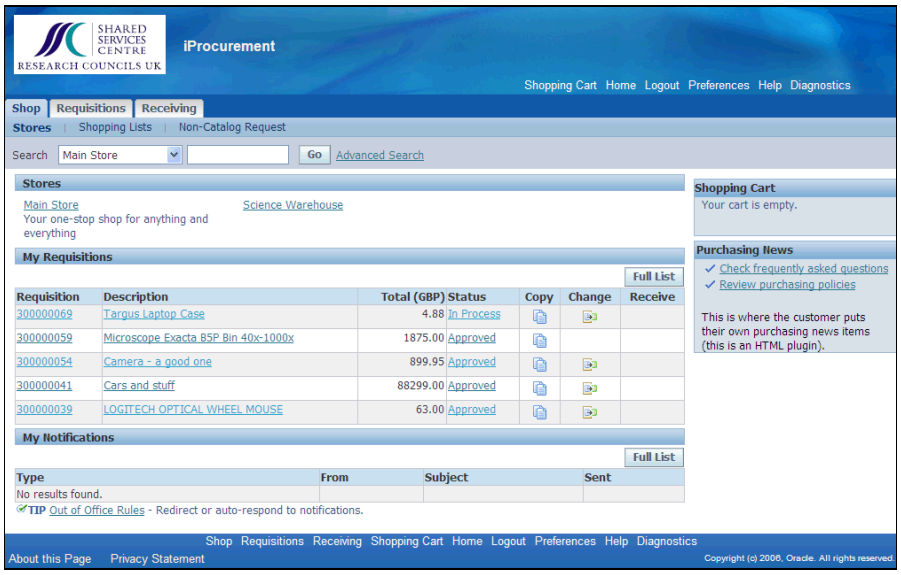
11. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000069 has been submitted to Canada, Cathy for approval.

12. Click the Continue Shopping button to go back into iProcurement.

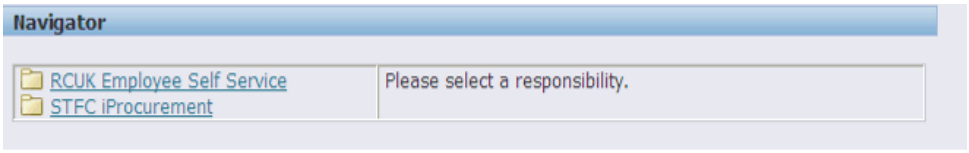


1.2 Smart Form Requisition

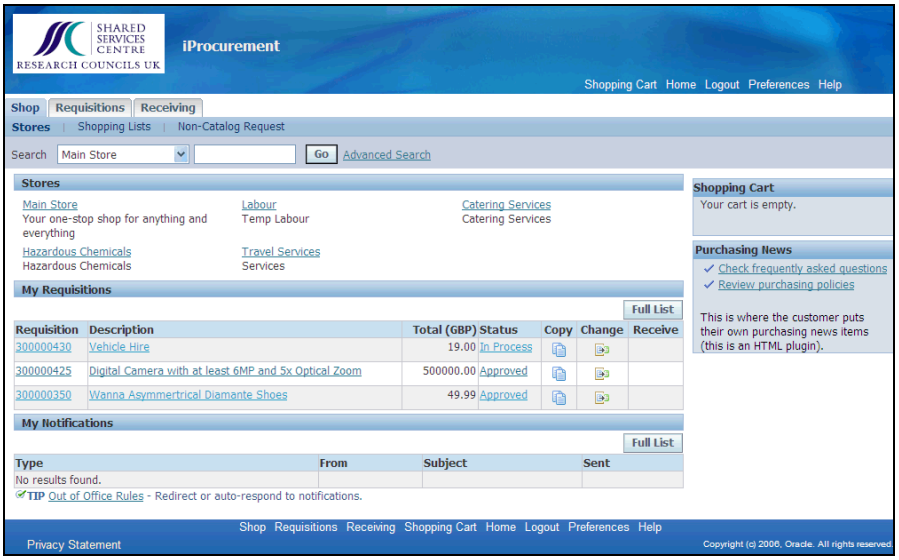
Smart Forms requisitions are setup to guide you through purchasing items that are not suitable for the Science Warehouse catalogues. Initially the SSC will use Smart Form requisitions for services such as legal and transport services.

In this example we create a Smart Form requisition for a rental car.

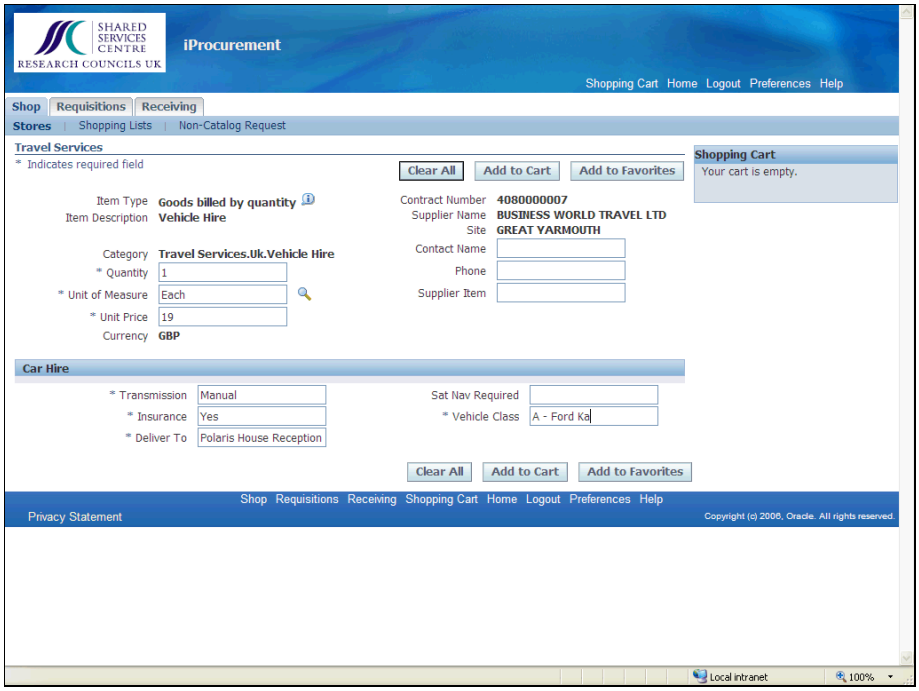
Procedure



1. Click the **STFC iProcurement** link.



2. Click the **Travel Services** link.



3. Enter the required information into the **Unit Price** field.
   Enter a valid value e.g. "**19**".

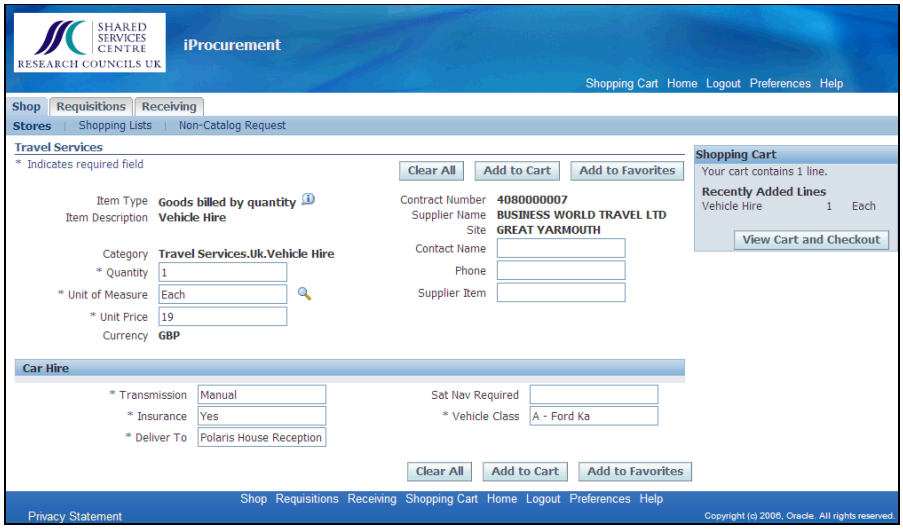
4. Enter the required information into the **Transmission** field.
   Enter a valid value e.g. "**Manual**".

5. Enter the required information into the **Insurance** field.
   Enter a valid value e.g. "**Yes**".

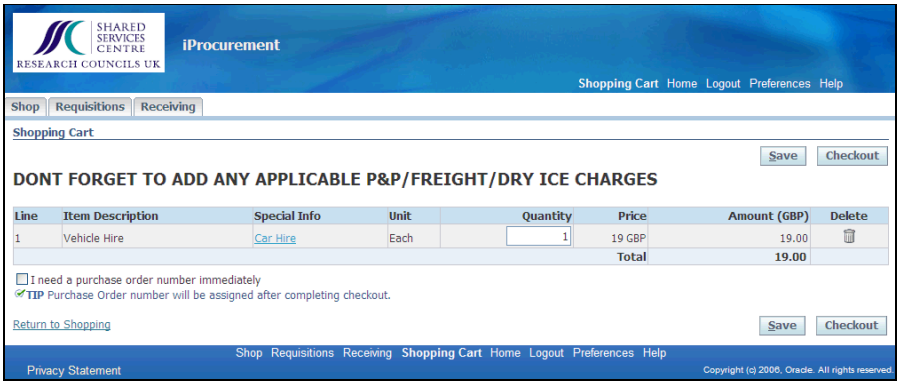
6. Enter the required information into the **Deliver To** field.
   Enter a valid value e.g. "**Polaris House Reception**".

7. Enter the required information into the **Vehicle Class** field.
   Enter a valid value e.g. "**A - Ford Ka**".

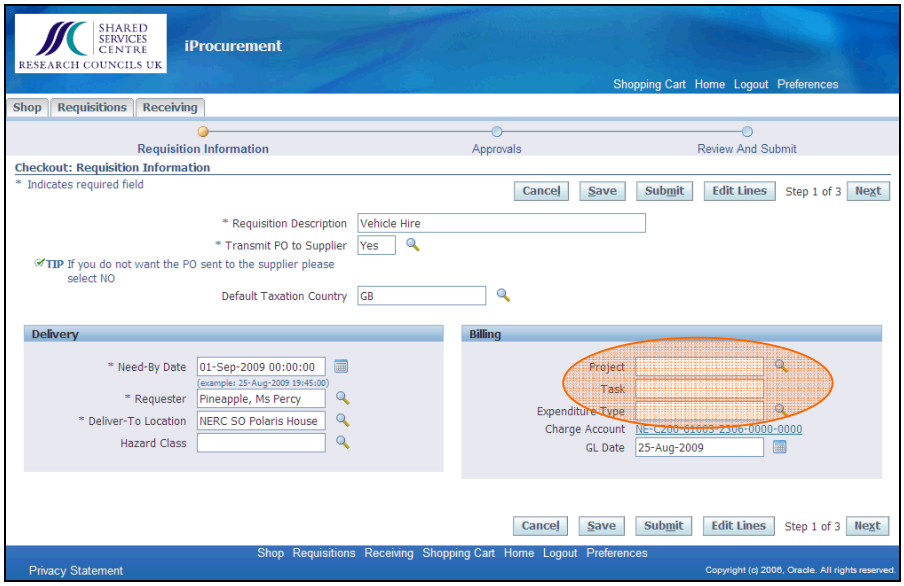
8. Click the Add to Cart button.



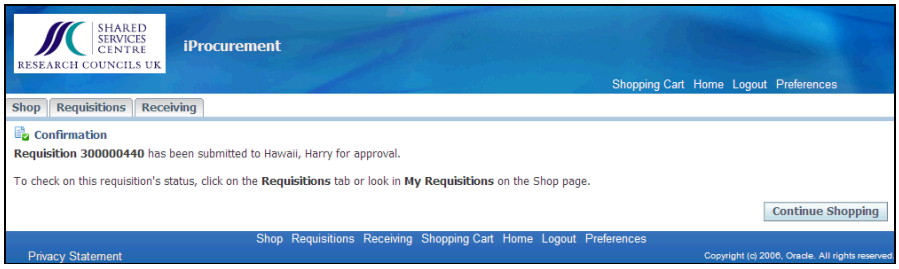
9. Click the **View Cart and Checkout** button.



10. Click the **Checkout** button.



11. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



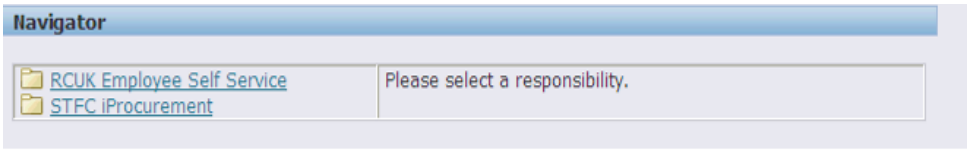
You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000440 has been submitted to Hawaii, Harry for approval.

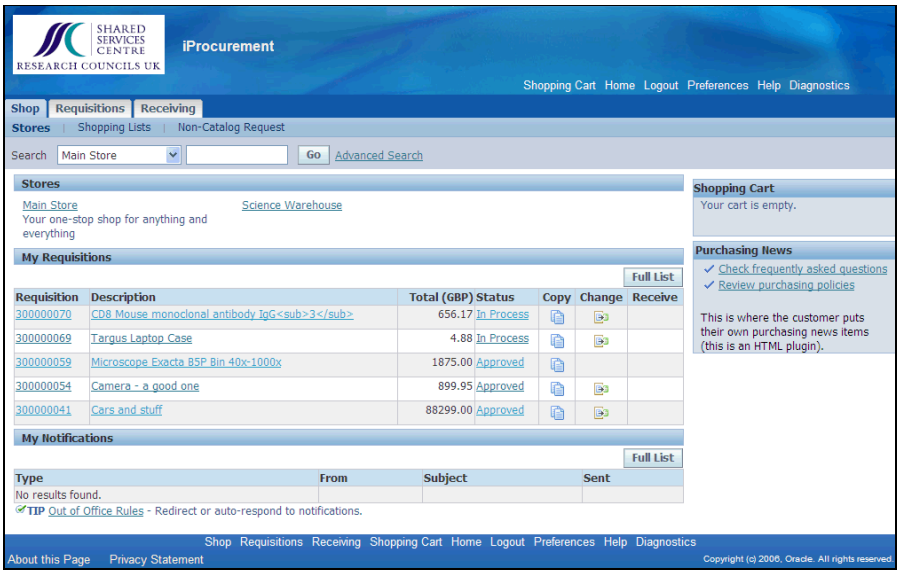
1.3 Non-Catalogue Request for Goods

A non-catalogue request should only be created if the item cannot be ordered in the Science Warehouse catalogue or on one of the Smart Forms.

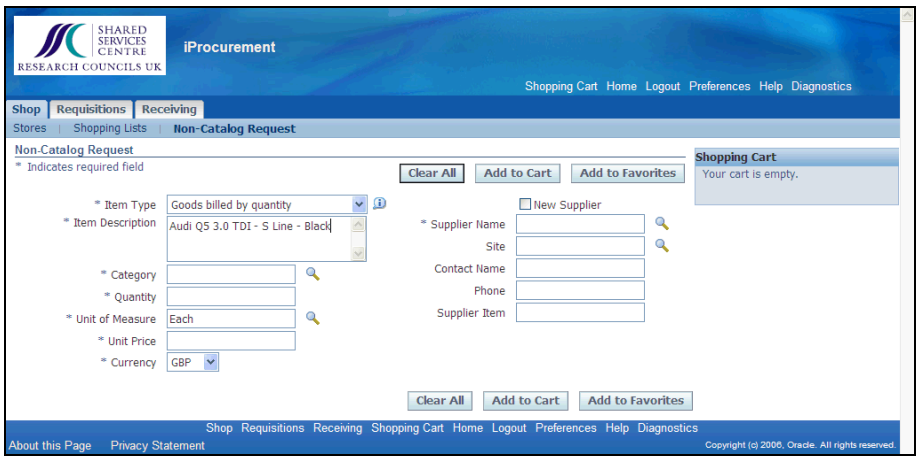
In this example we create a non-catalogue request for an Audi Q5.



1. Click the **STFC iProcurement** link.



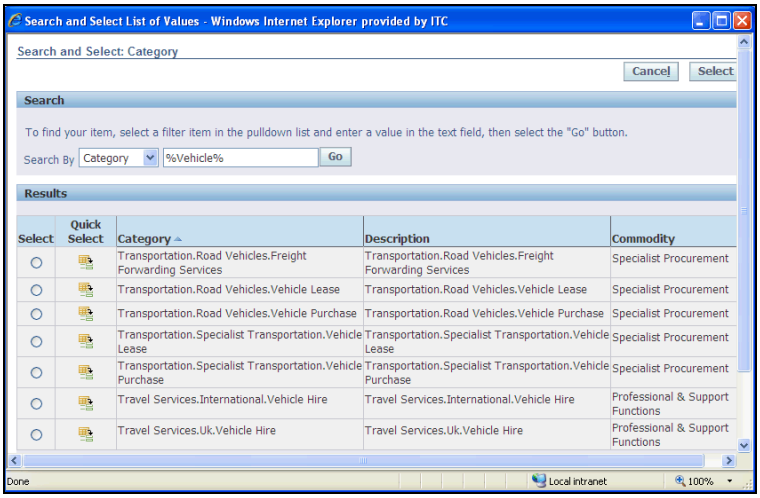
2. Click the **Non-Catalog Request** link.



3. Click in the **Item Description** field.

4. Enter the required information into the **Item Description** field.
Enter a valid value e.g. "**Audi Q5 3.0 TDI - S Line - Black**".

5. Click the **Search for Category** button.

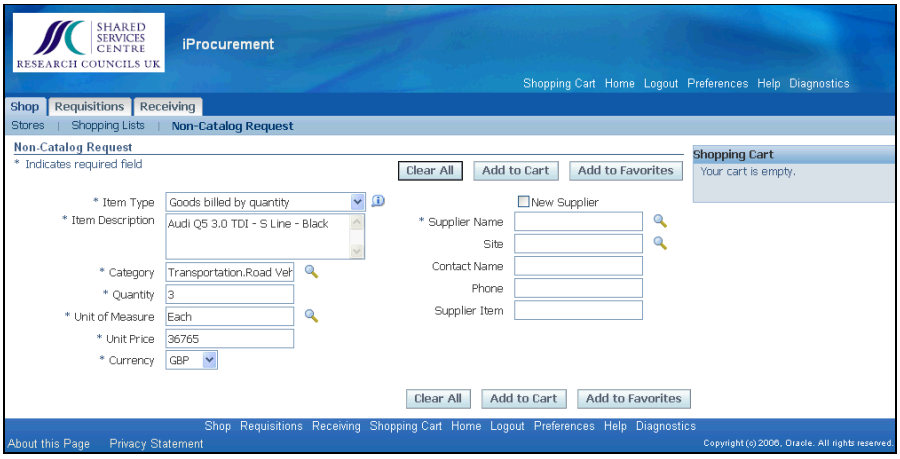


6. Click in the **Search By** field.

7. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**%Vehicle%**".

8. Click the **Go** button.

9. Click the **Quick Select** button to select **Transportation.Road Vehicles.Vehicle Purchase**.



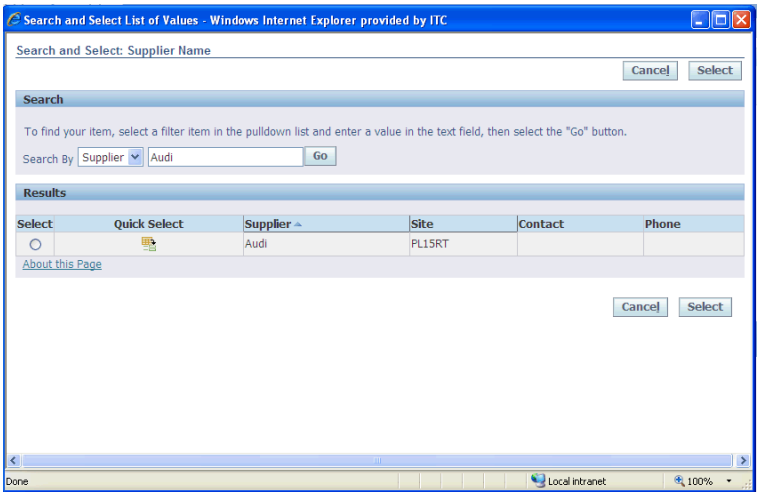
10. Click in the **Quantity** field.

11. Enter the required information into the **Quantity** field.
Enter a valid value e.g. "**3**".

12. Click in the **Unit Price** field.

13. Enter the required information into the **Unit Price** field.
Enter a valid value e.g. "**36765**".

14. Click the **Search for Supplier Name** button.

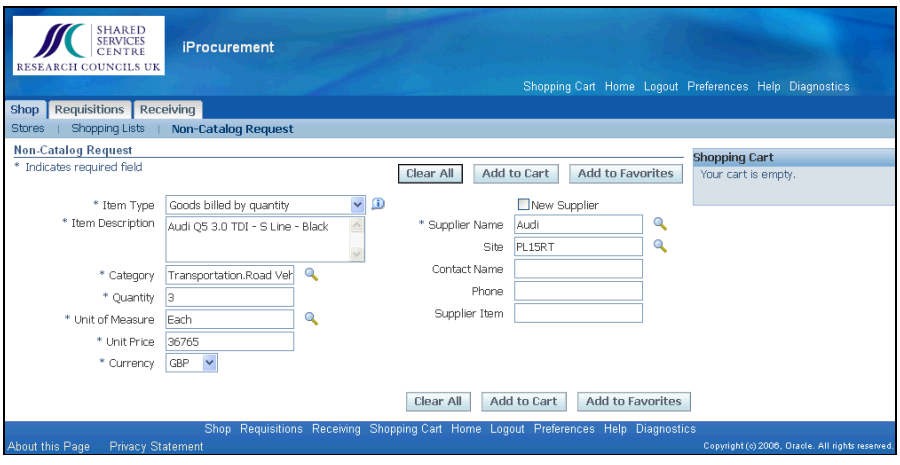


15. Click in the **Search By** field.

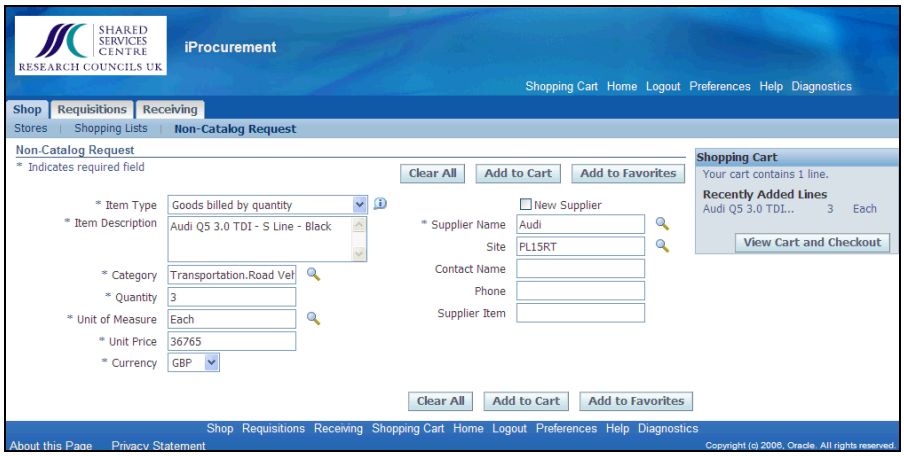
16. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**Audi**".

17. Click the **Go** button.

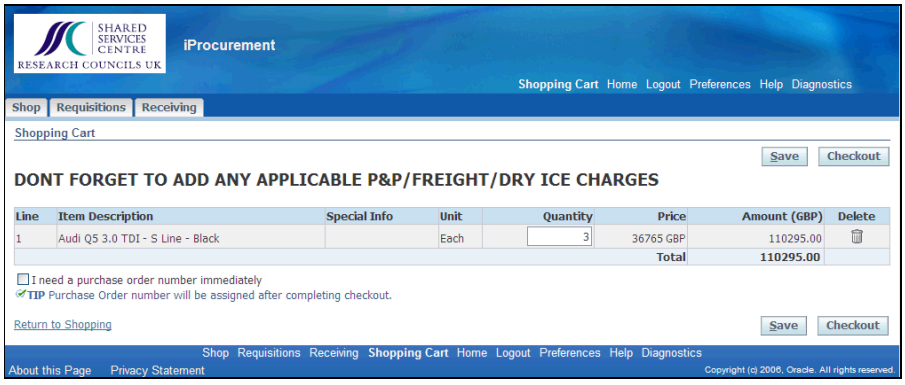
18. Click the **Quick Select** button.



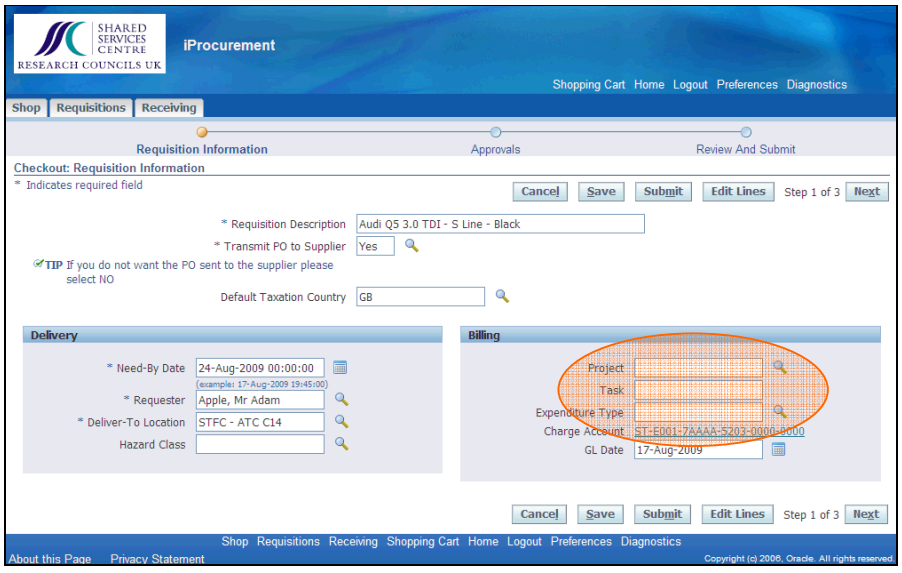
19. Click the Add to Cart button.



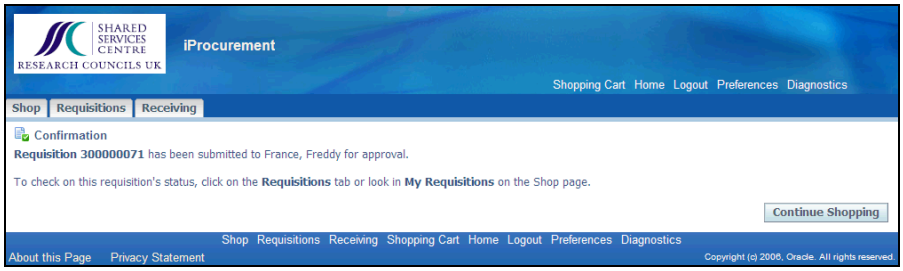
20. Click the View Cart and Checkout button.



21. Click the Checkout button.



22. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000071 has been submitted to France, Freddy for approval.

2. Requisition Options

2.1 Science Warehouse Comparison Tool

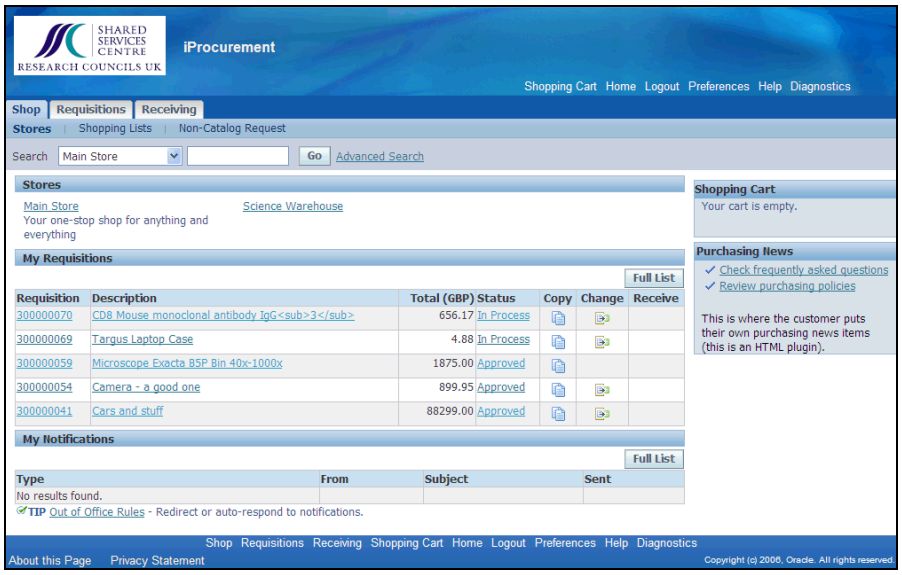
Science Warehouse provides us with a powerful filter and comparison tool that allows you to easily find an item to your exact specification.

In this example we search for Mouse Antibodies and filter by the category Primary Antibodies.

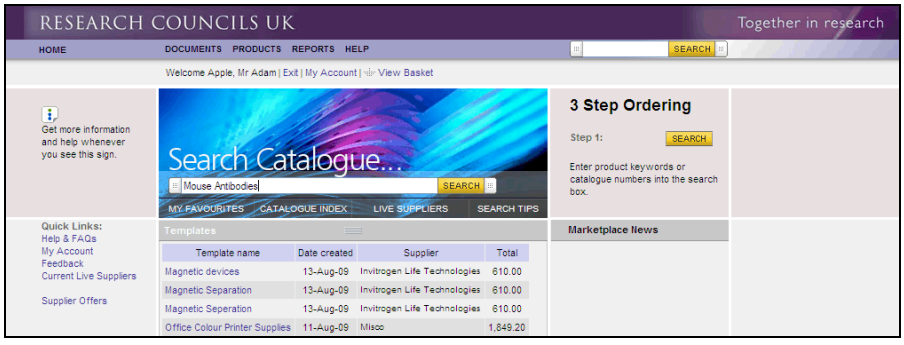
Once filtered we are able to view the section specific to Primary Antibodies.

We then utilise the comparison tool to compare our chosen antibodies side-by-side.

1. Click the **STFC iProcurement** link.



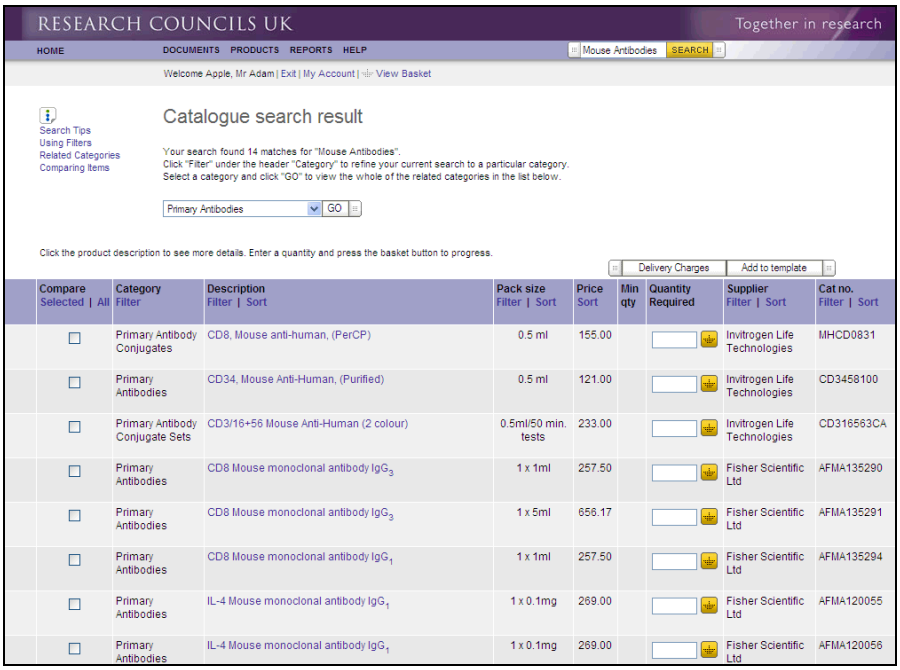
2. Click the **Science Warehouse** link.



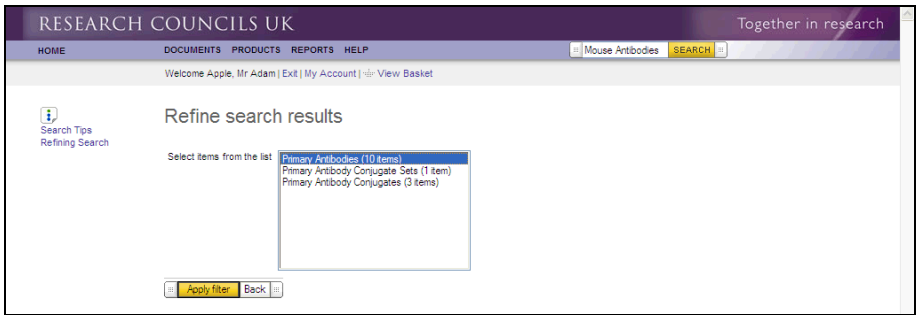
3. Click in the **Search Catalogue** field.

4. Enter the required information into the **Search Catalogue** field. Enter a valid value e.g. "**Mouse Antibodies**".

5. Click the SEARCH button.

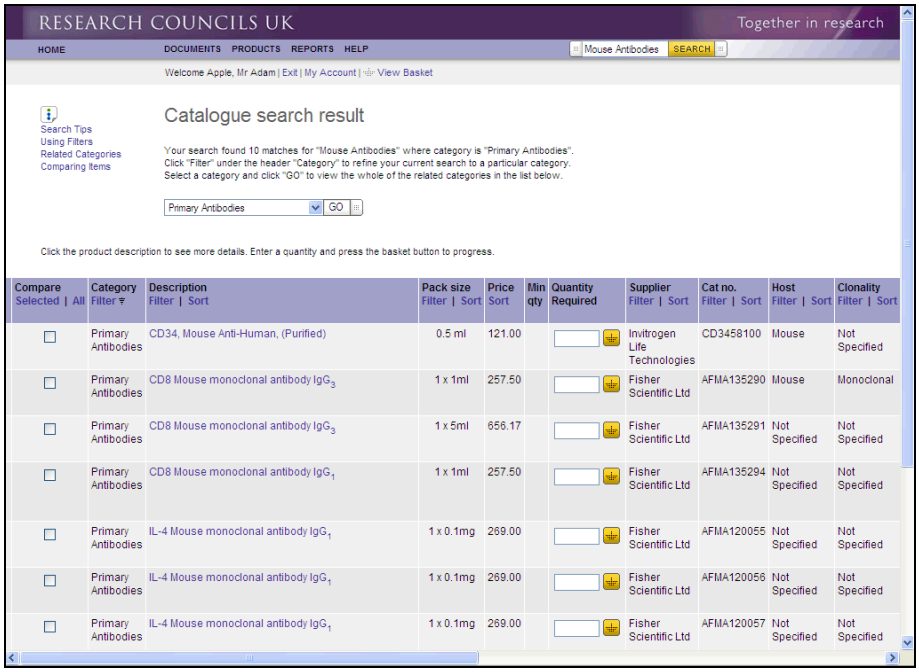


6. Click the **Filter** link under **Category**.

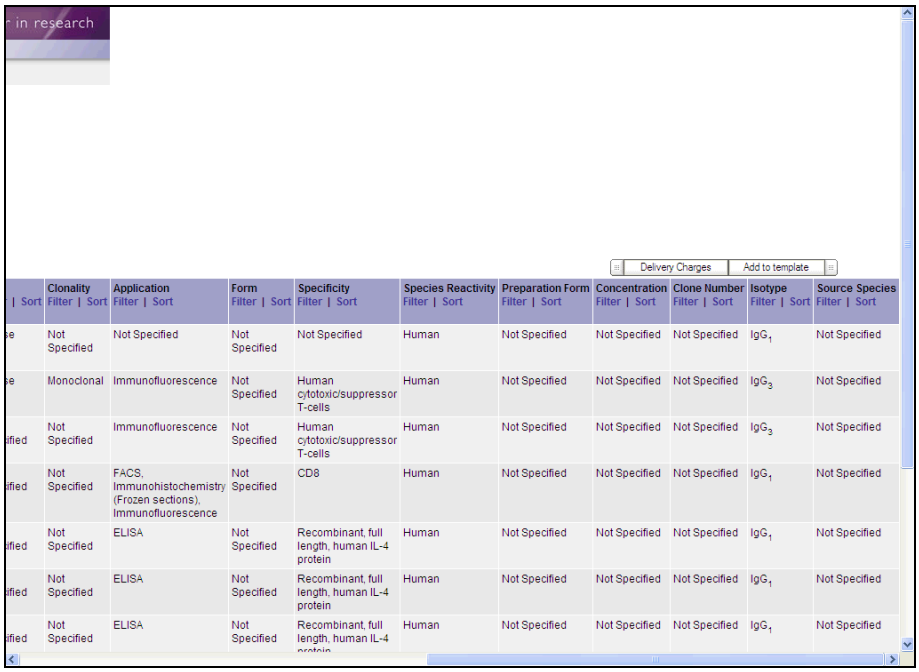


7. Click the **Primary Antibodies (10 items)** list item.

8. Click the Apply filter button.

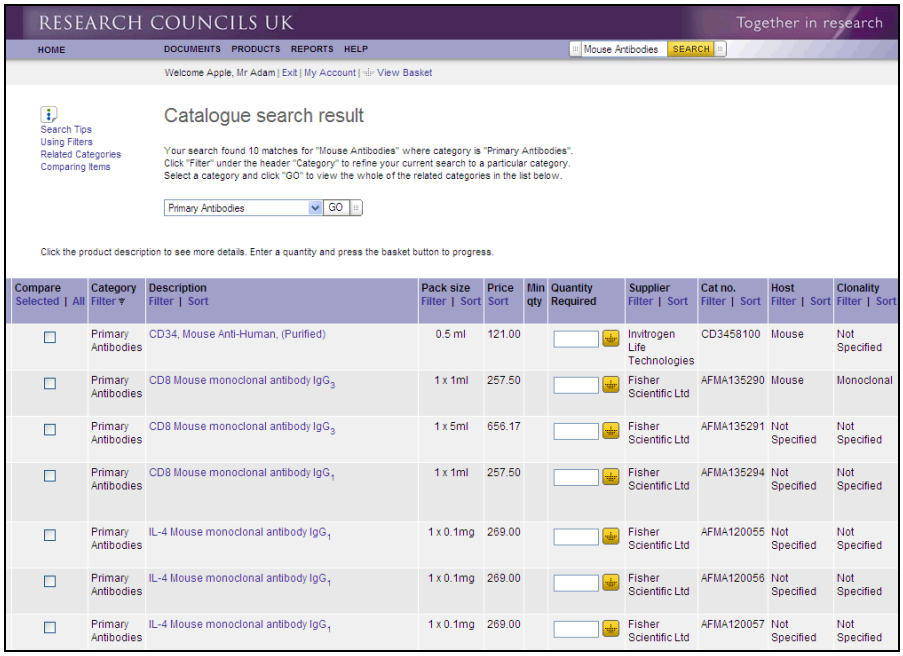


9. Click the **horizontal** scrollbar to scroll right.



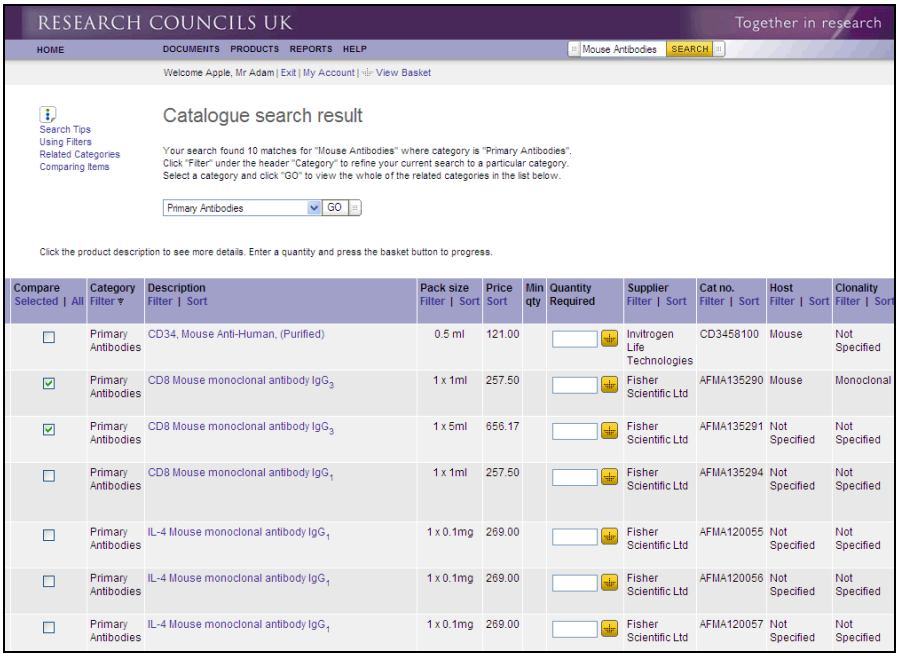
10. This will display the sections unique to the filtered category.

    Click the **horizontal** scrollbar to scroll left.

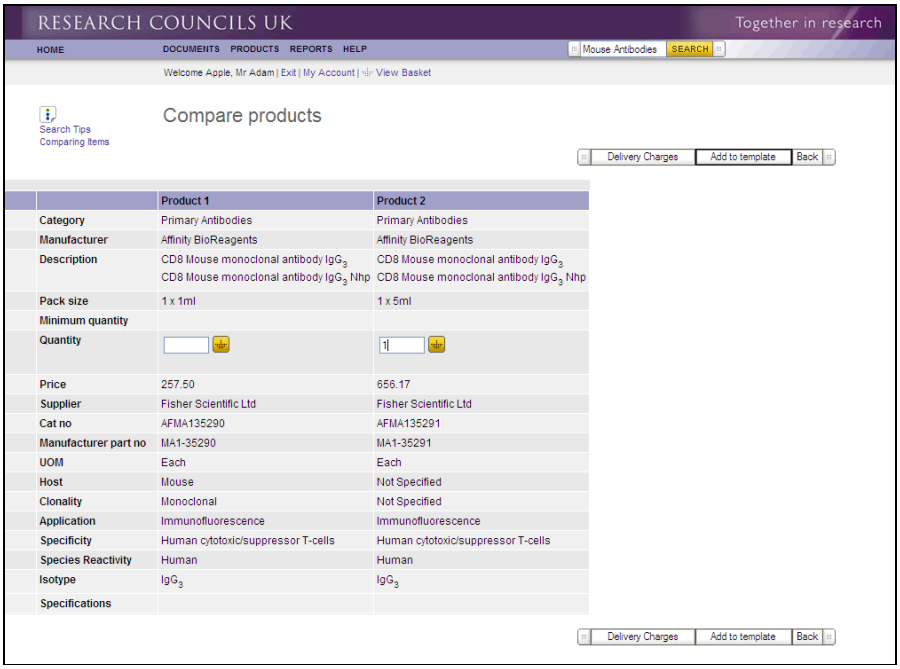


11. Tick the first **CD8 Mouse monoclonal antibody** box.

12. Tick the second **CD8 Mouse monoclonal antibody** box.



13. Click the **Selected** link under **Compare**.

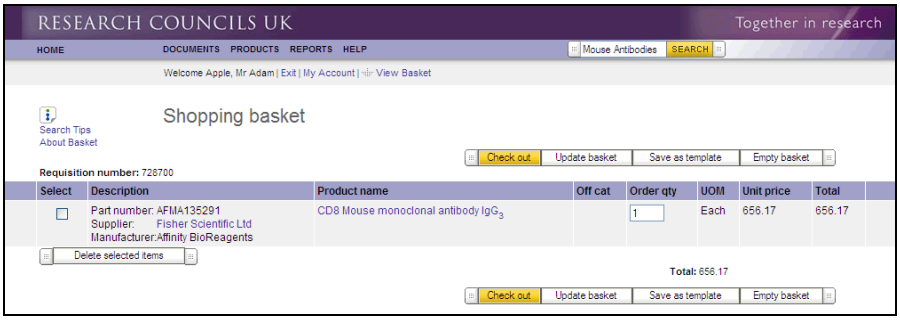


14. Review your selection.

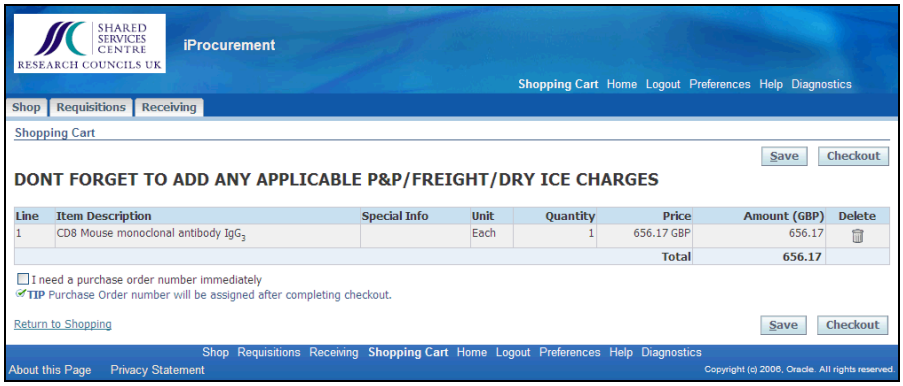
    Click in the **Quantity** field for **Product 2**.

15. Enter the required information into the **Quantity** field.
    Enter a valid value e.g. "**1**".

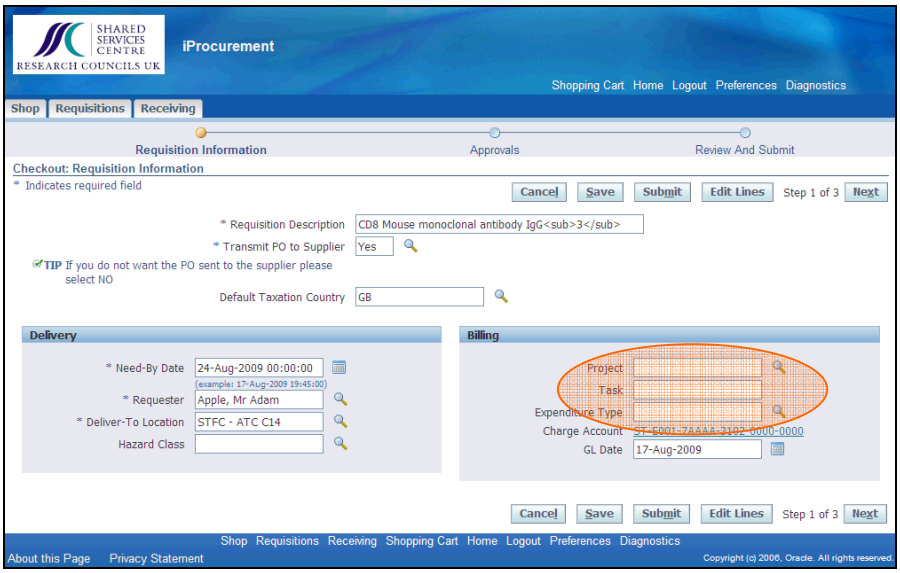
16. Click the **Add to Basket** button.



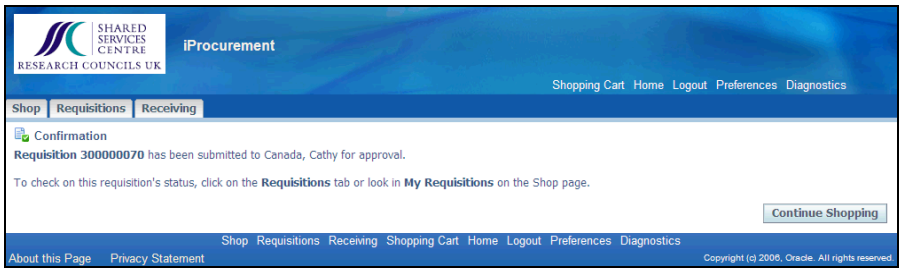
17. Click the Check out button.



18. Click the **Checkout** button.



19. Ensure all the Project Information and Expenditure type is entered before you click the **Submit** button, else the system will not know the Project you're procuring against.



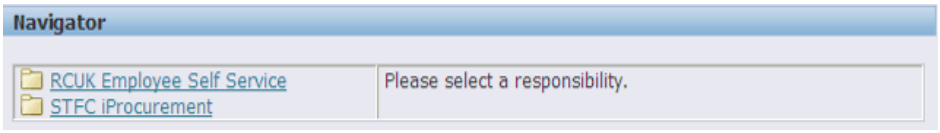
You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000070 has been submitted to Canada, Cathy for approval.

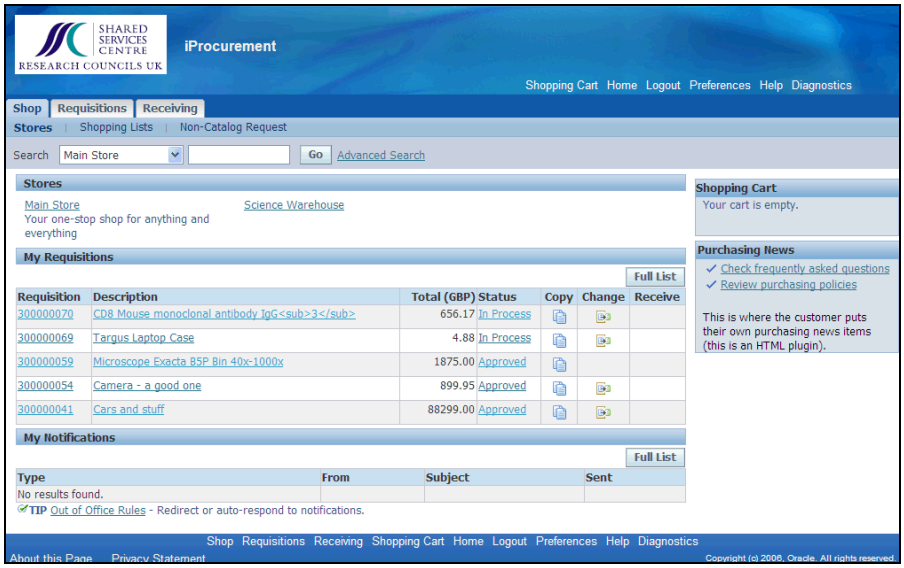
2.2 Creating a Science Warehouse Template

Science Warehouse allows you to create a template (or shopping list) for items that you regularly purchase. These templates can be shared with others in your organisation. E.g. you may use a shared template for office stationery.

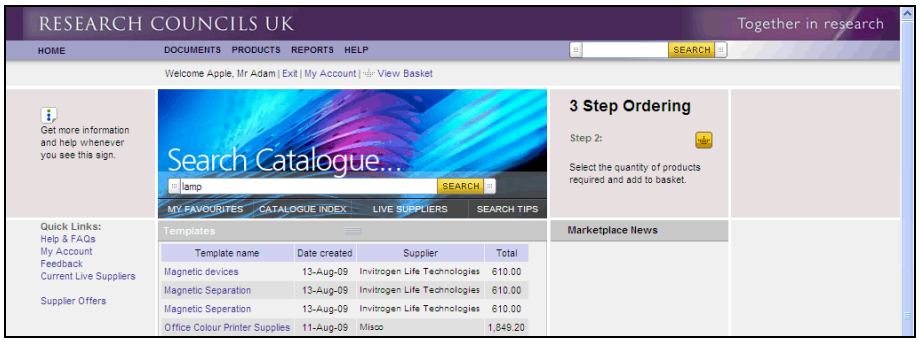
In this example we create a template for replacement parts for a specialist lamp. We also allow two other users to share this template. One user is allowed to modify the template and the other user can only create orders from the template.



1. Click the **STFC iProcurement** link.



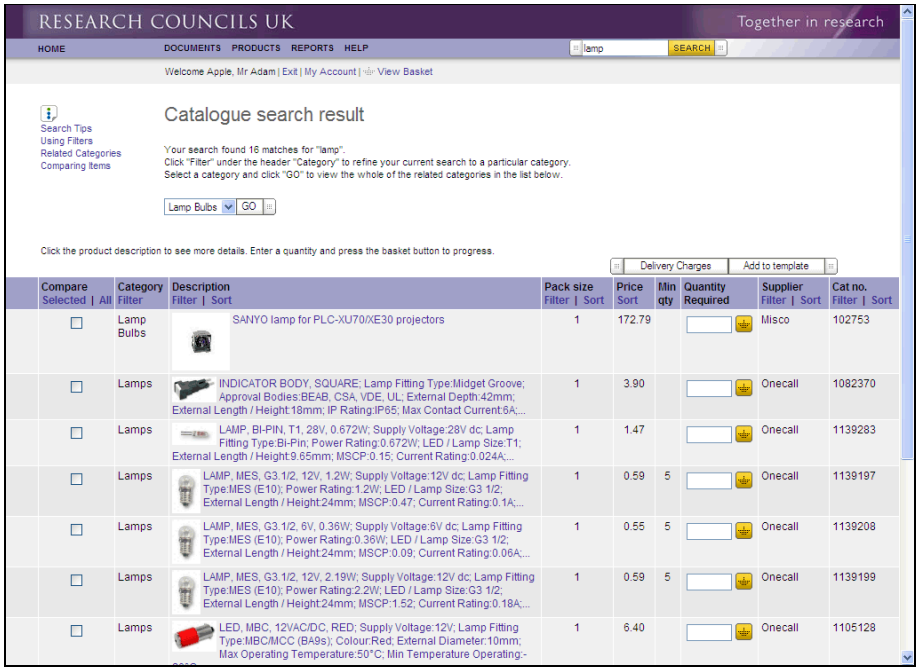
2. Click the **Science Warehouse** link.



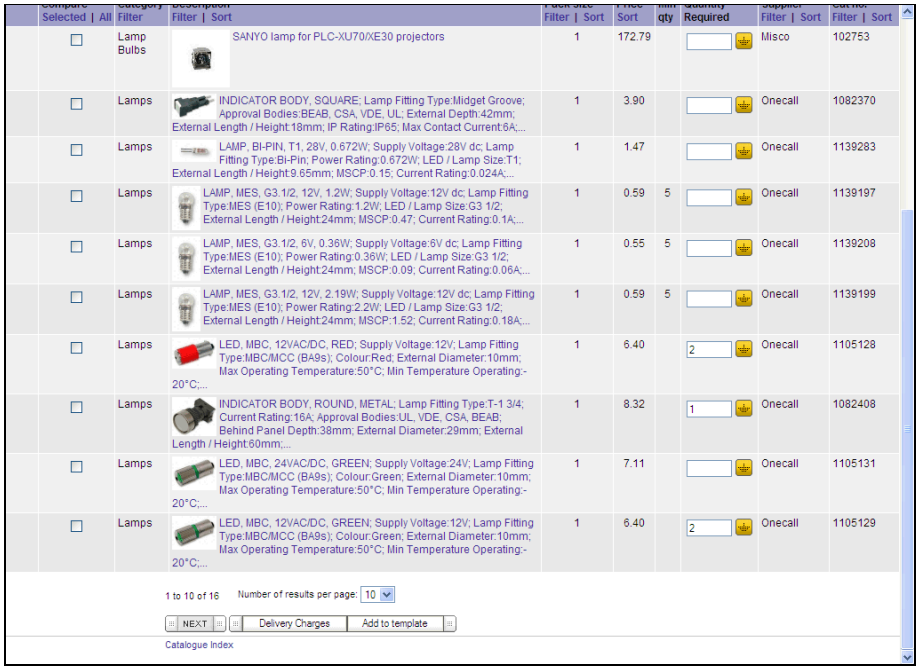
3. Click in the **Search Catalogue** field.

4. Enter the required information into the **Search Catalogue** field. Enter a valid value e.g. "**lamp**".

5. Click the SEARCH button.



6. Click the **vertical** scrollbar to scroll down if required.



7. Click in the **Quantity** field next to the **Red LED (£6.40)**.

8. Enter the required information into the **Quantity** field.
Enter a valid value e.g. "**2**".

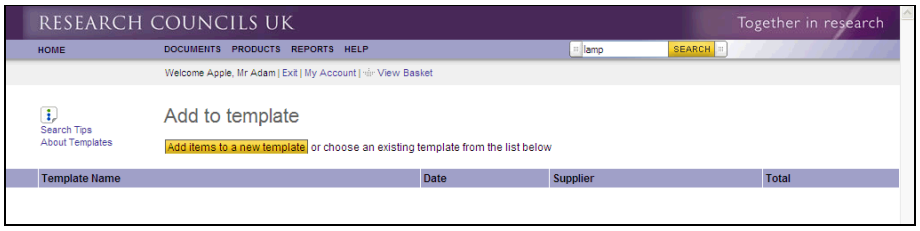
9. Click in the **Quantity** field next to the **Indicator Body (£8.32)**.

10. Enter the required information into the **Quantity** field.
Enter a valid value e.g. "**1**".

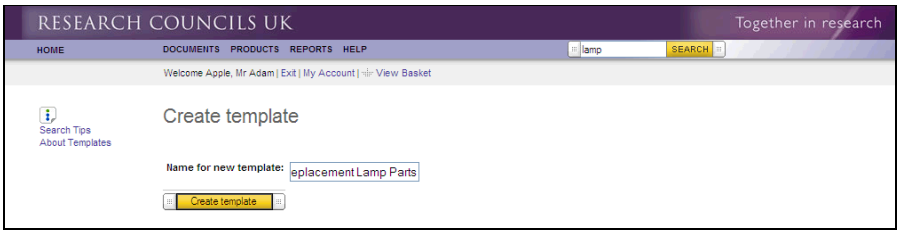
11. Click in the **Quantity** field next to the **Green LED (£6.40)**.

12. Enter the required information into the **Quantity** field.
Enter a valid value e.g. "**2**".

13. Click the Add to template button.

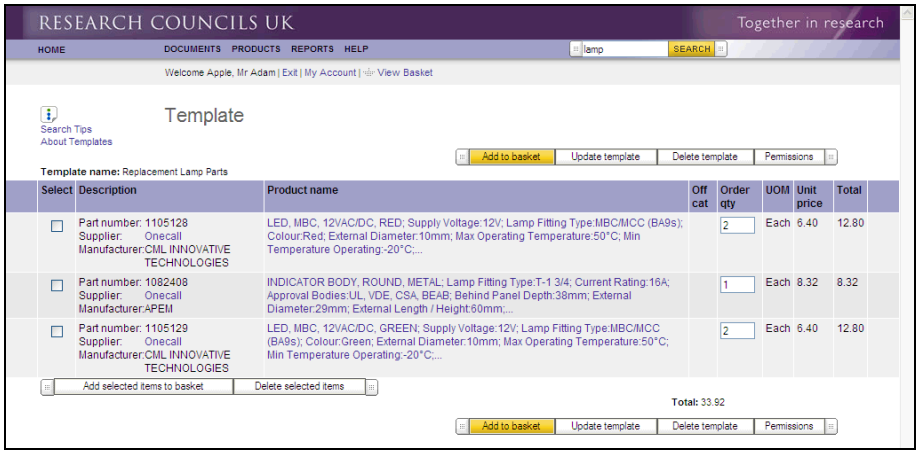


14. Click the Add items to a new template link.

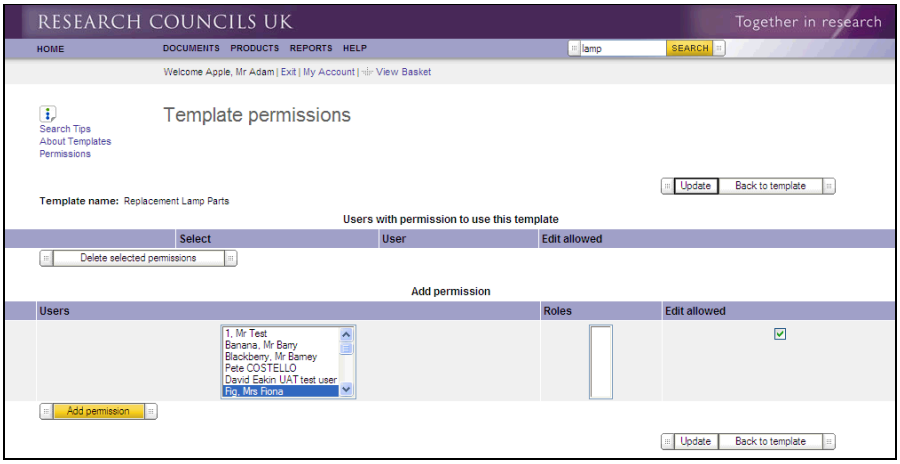


15. Enter the required information into the **Name for new template:** field.
Enter a valid value e.g. "**Replacement Lamp Parts**".

16. Click the Create template button.



17. Click the Permissions button.

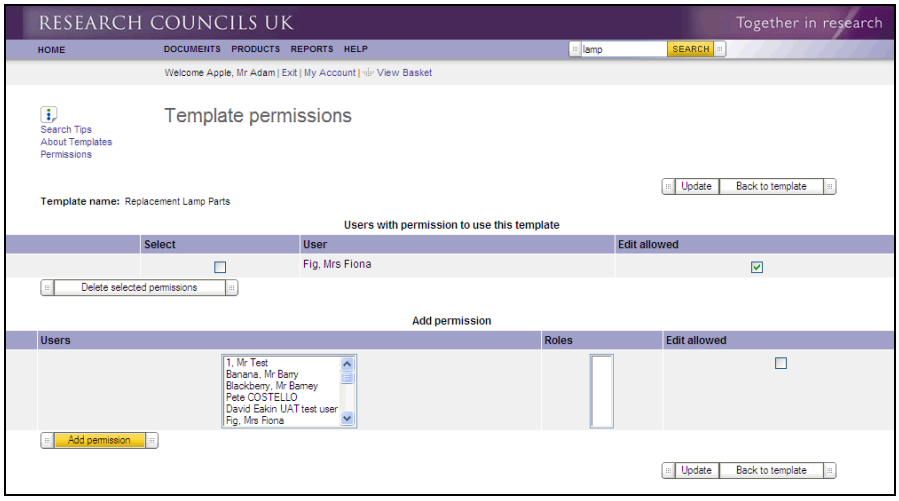


18. Click the **Fig, Mrs Fiona** list item.

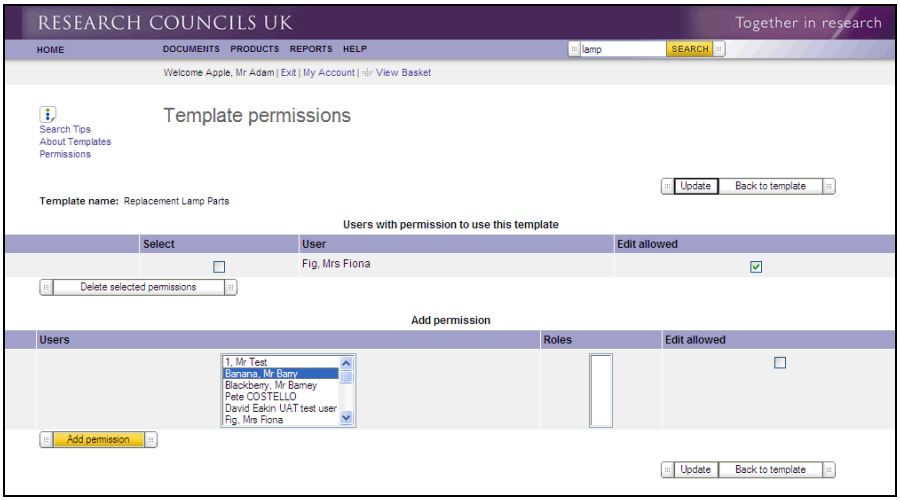
19. If required tick the **Edit allowed** box.

Please be aware that users with editing permission will be able to change your template and give others permissions to view or edit your template.

20. Click the Add permission button.

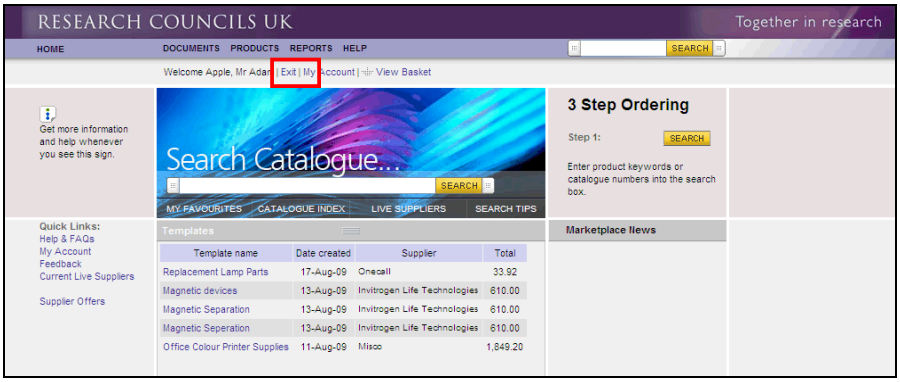


21. Click the **Banana, Mr Barry** list item.

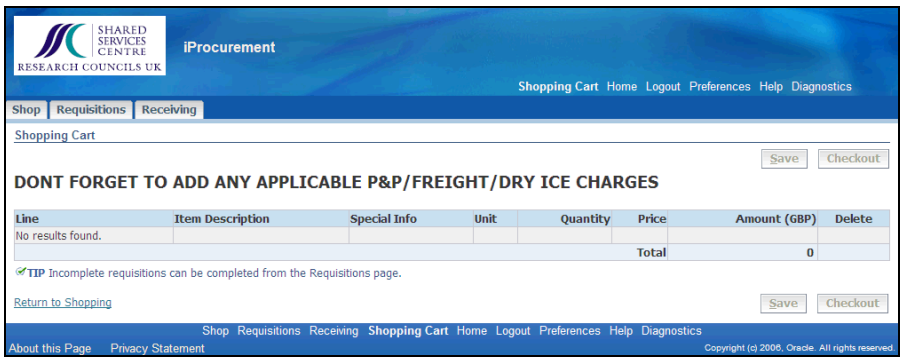


22. Click the Add permission button.

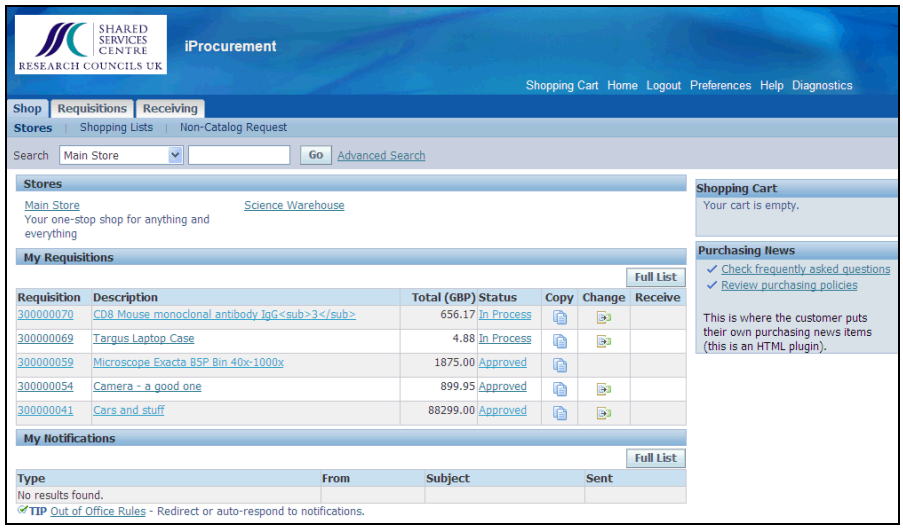
23. Click the HOME link in the top left hand corner.



24. Click the **Exit** link.

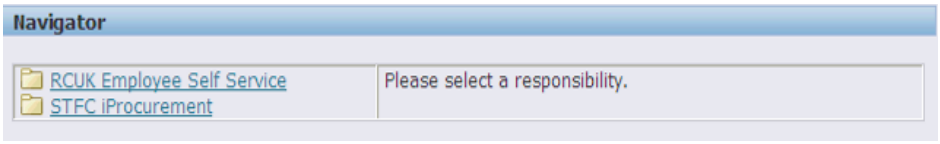


25. Click the Shop tab to go back to the iProcurement homepage.

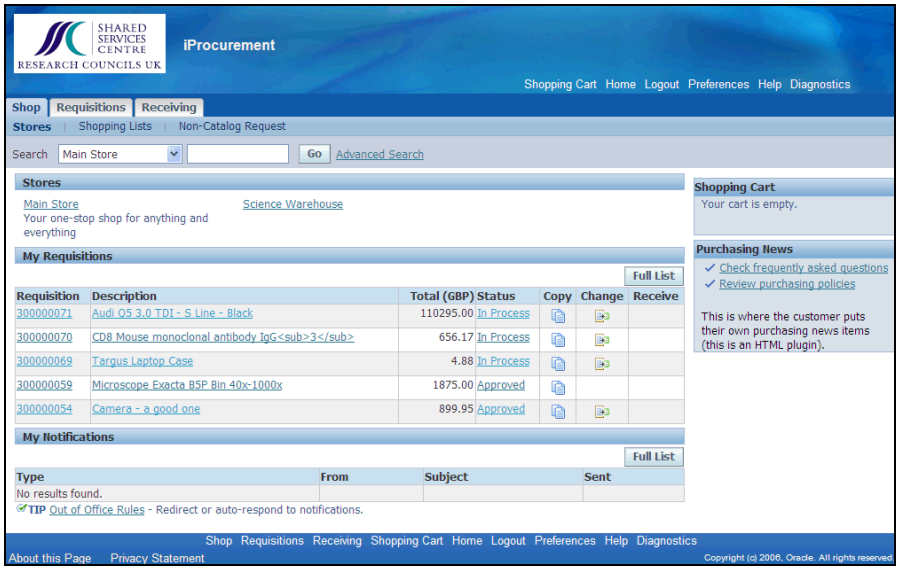


2.3 Non-Catalogue Requests for Services

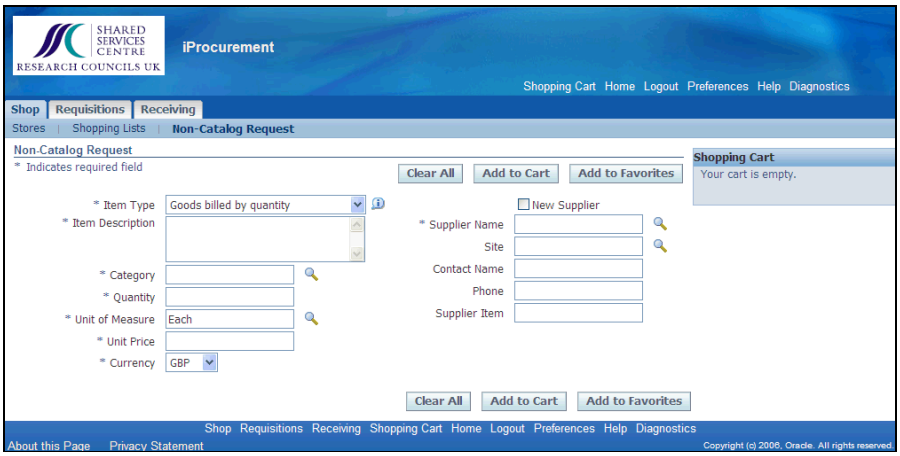
In this example we create a non-catalogue request for window cleaning.



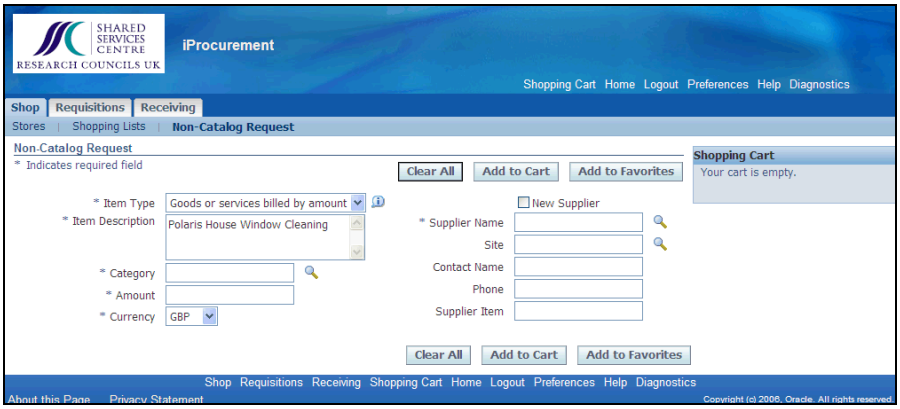
1. Click the **STFC iProcurement** link.



2. Click the **Non-Catalog Request** link.



3. Click the **Item Type** drop-down list.



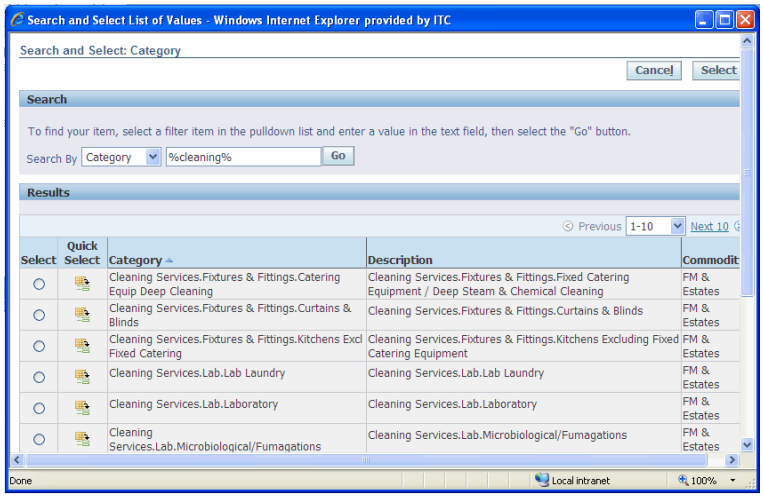
4. Click the **Goods or services billed by amount** list item.

Note that you can also use **Services billed by quantity**. E.g. instead of a service costing a flat amount (i.e. £2500) it may be broken into units such as 5 days at £500 per day.

5. Click in the **Item Description** field.

6. Enter the required information into the **Item Description** field.
Enter a valid value e.g. "**Polaris House Window Cleaning**".

7. Click the **Search for Category** button.

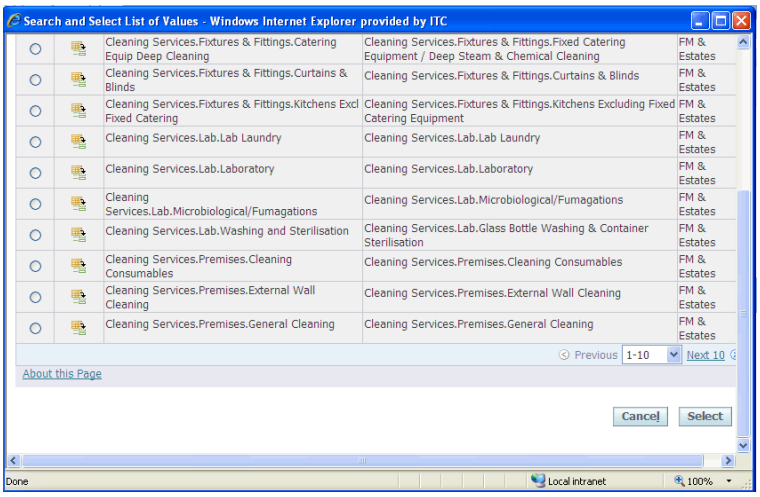


8. Click in the **Search By** field.

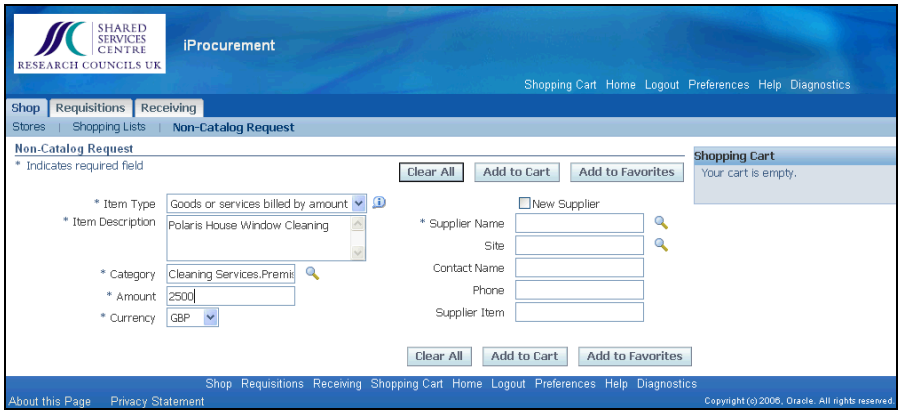
9. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**%cleaning%**".

10. Click the Go button.

11. Click the **vertical** scrollbar to scroll down if required.



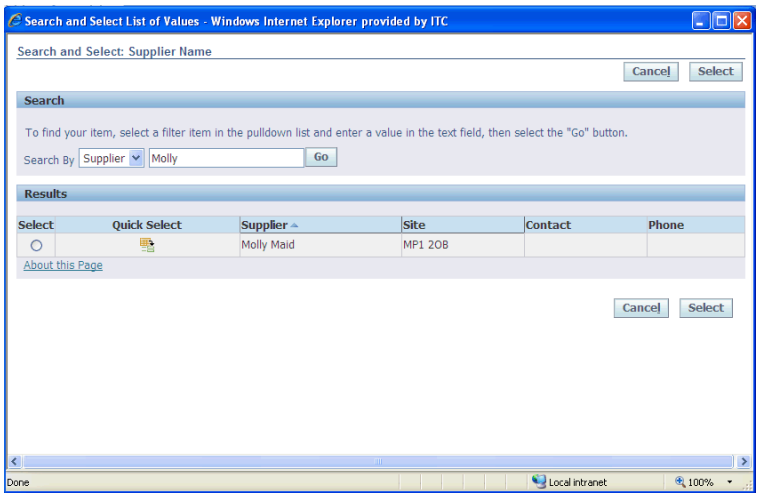
12. Click the **Quick Select** button next to **Cleaning Services.Premises.General Cleaning**.



13. Click in the **Amount** field.

14. Enter the required information into the **Amount** field.
Enter a valid value e.g. "**2500**".

15. Click the **Search for Supplier Name** button.

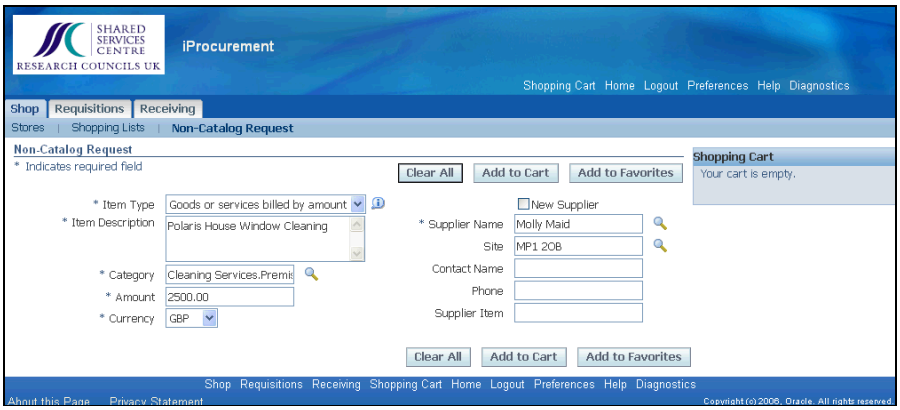


16. Click in the **Search By** field.

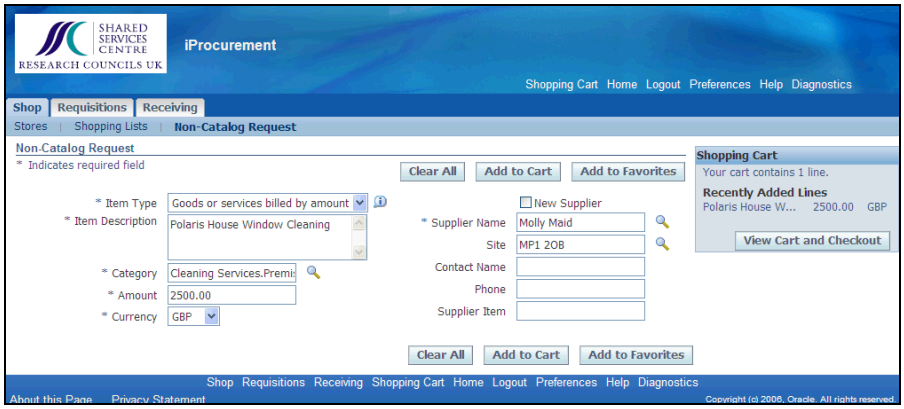
17. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**Molly**".

18. Click the Go button.

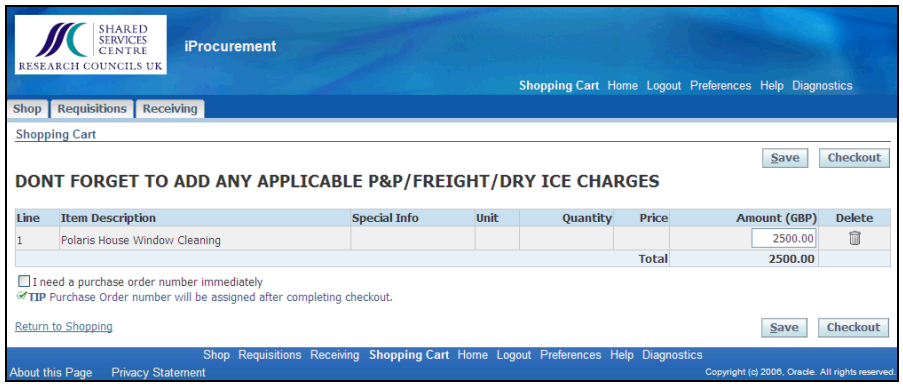
19. Click the **Quick Select** button.



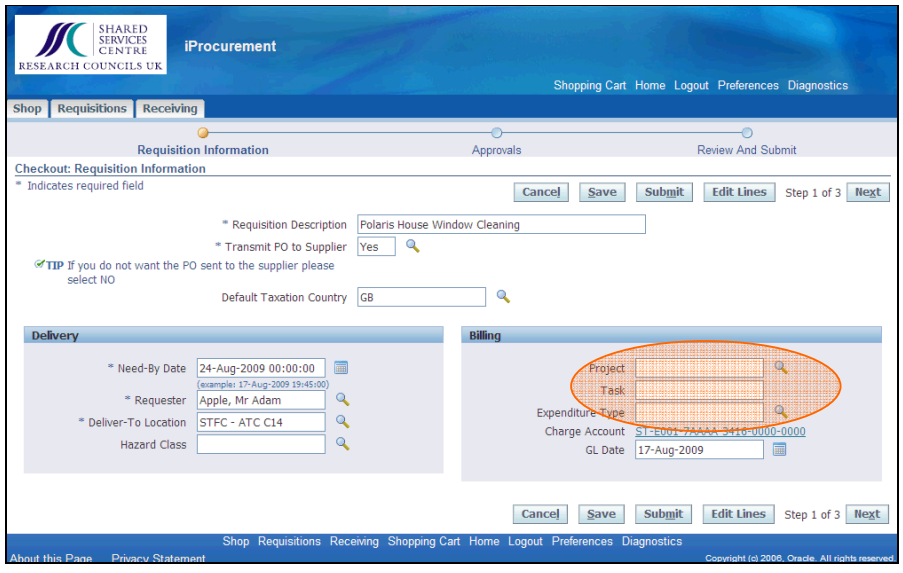
20. Click the Add to Cart button.



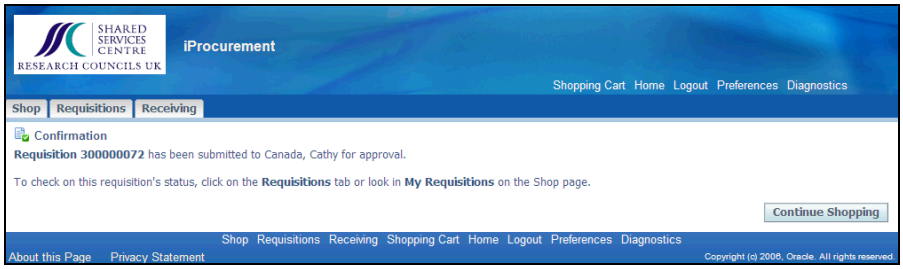
21. Click the View Cart and Checkout button.



22. Click the Checkout button.



23. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



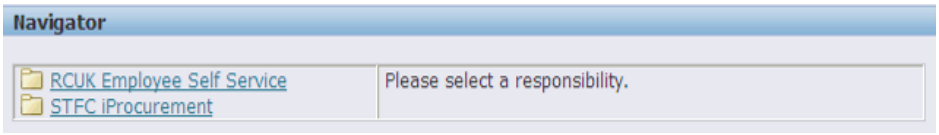
You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000072 has been submitted to Canada, Cathy for approval.

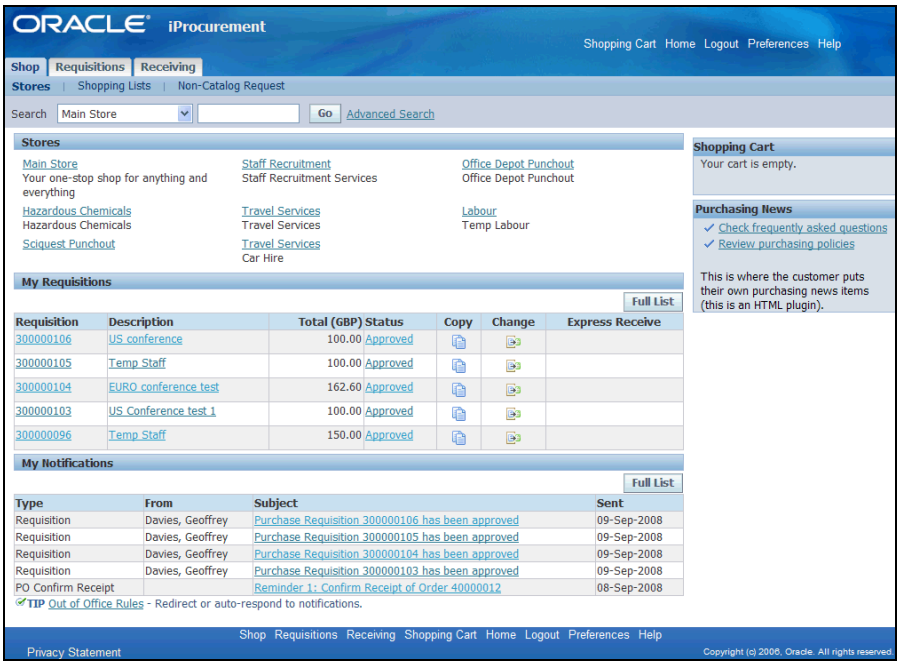
2.4 Foreign Non-Catalogue Request

In this example we create a non-catalogue request for a European conference in Euros.

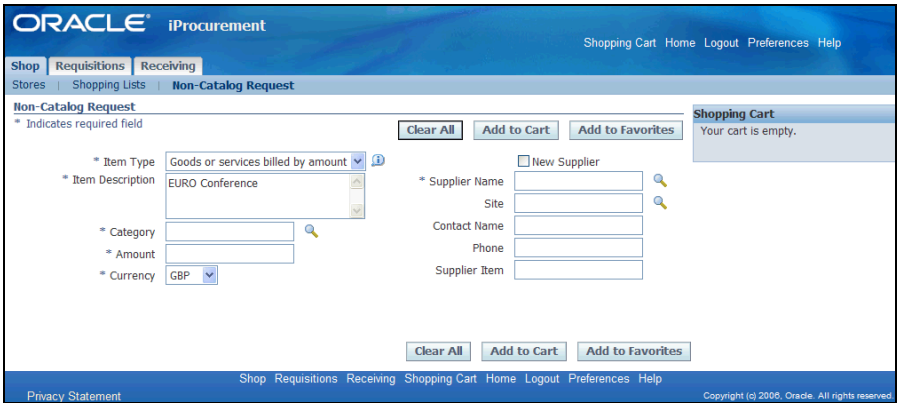
Procedure



1. Click the **STFC iProcurement** link.



2. Click the **Non-Catalog Request** link under the **Shop** tab.



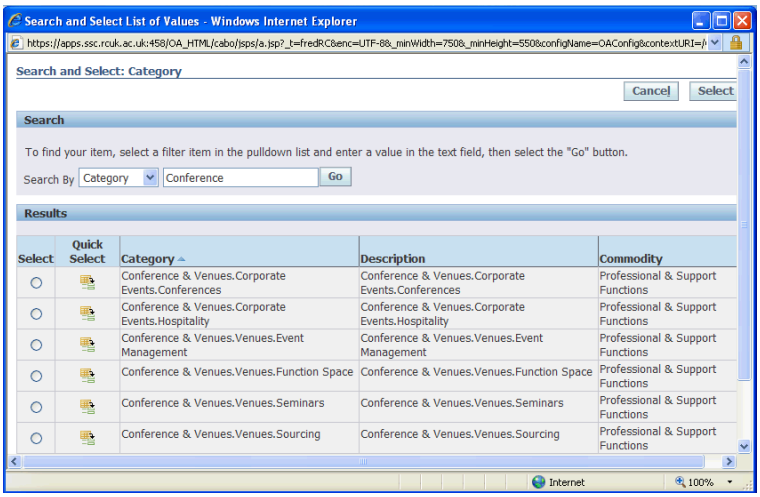
3. Click the **Item Type** drop-down list.

4. Click an entry in the list. Select **Goods or services billed by amount**.

5. Click in the **Item Description** field.

6. Enter the required information into the **Item Description** field.
Enter a valid value e.g. "**EURO Conference**".

7. Click the **Search for Category** button.

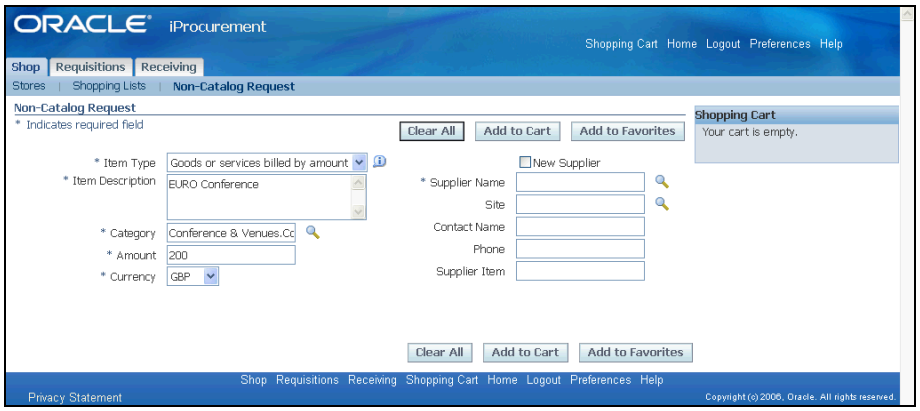


8. Click in the **Search By** field.

9. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**Conference**".

10. Click the Go button.

11. Click the **Quick Select** button to select **Conference & Venues. Corporate Events. Hospitality**.



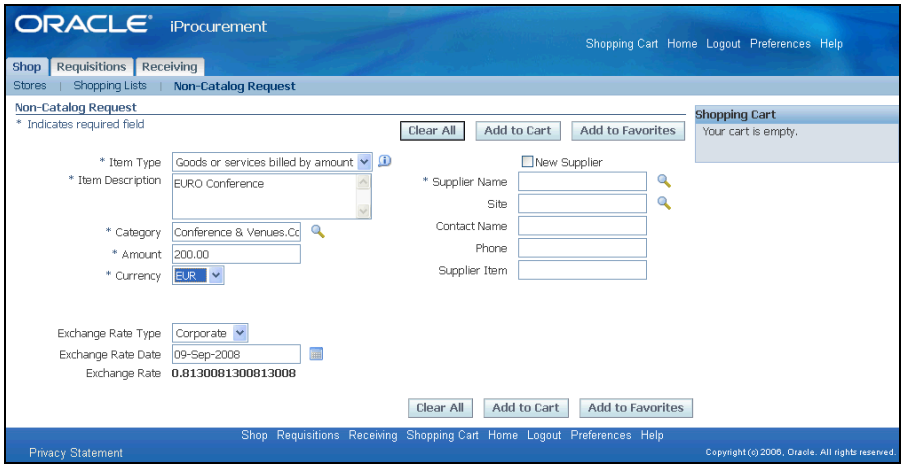
12. Click in the **Amount** field.

13. Enter the required information into the **Amount** field.
Enter a valid value e.g. "**200**".

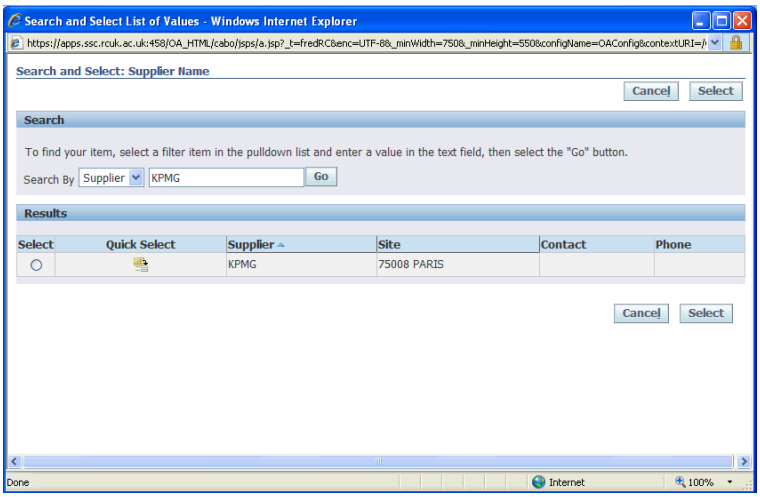
14. Click the **Currency** drop-down list.

15. Click an entry in the list. Select **EUR**.

Once you have selected a currency it will default to using the Corporate Exchange Rate as seen below.



16. Click the **Search for Supplier Name** button.

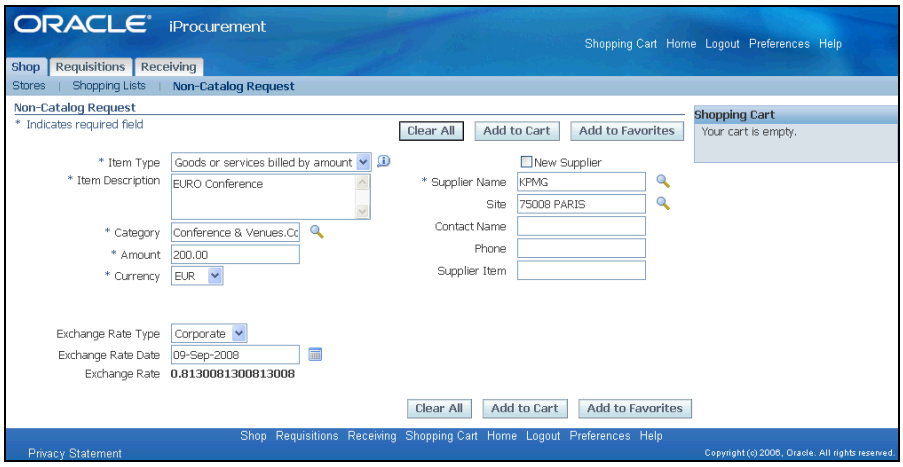


17. Click in the **Search By** field.

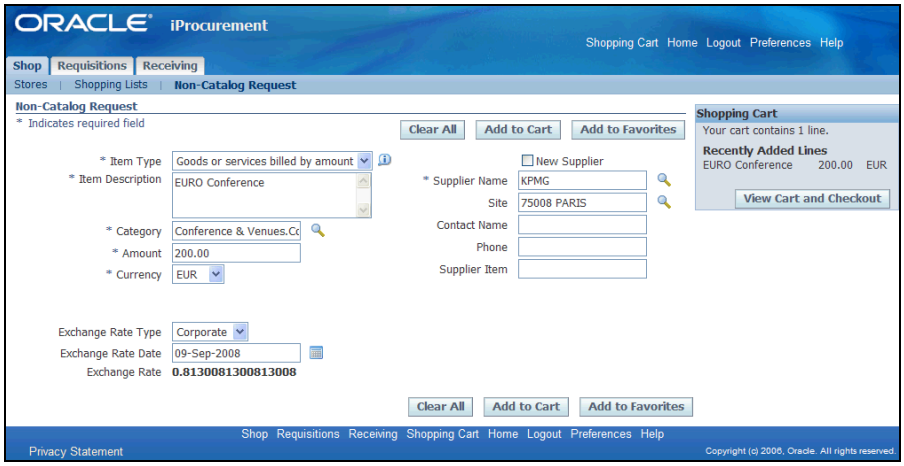
18. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**KPMG**".

19. Click the Go button.

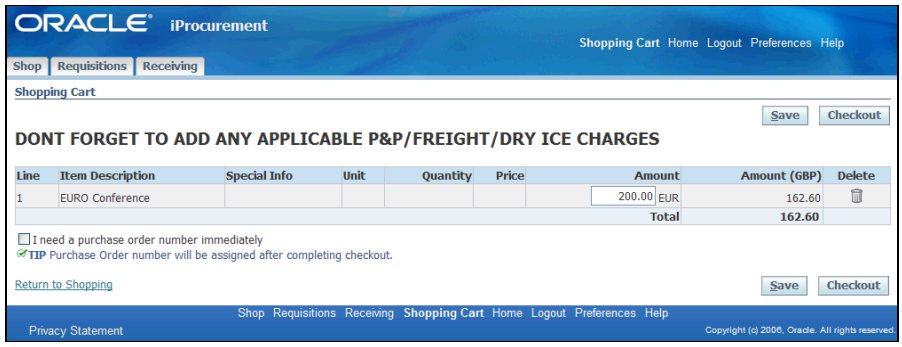
20. Click the **Quick Select** button to select **KPMG**.



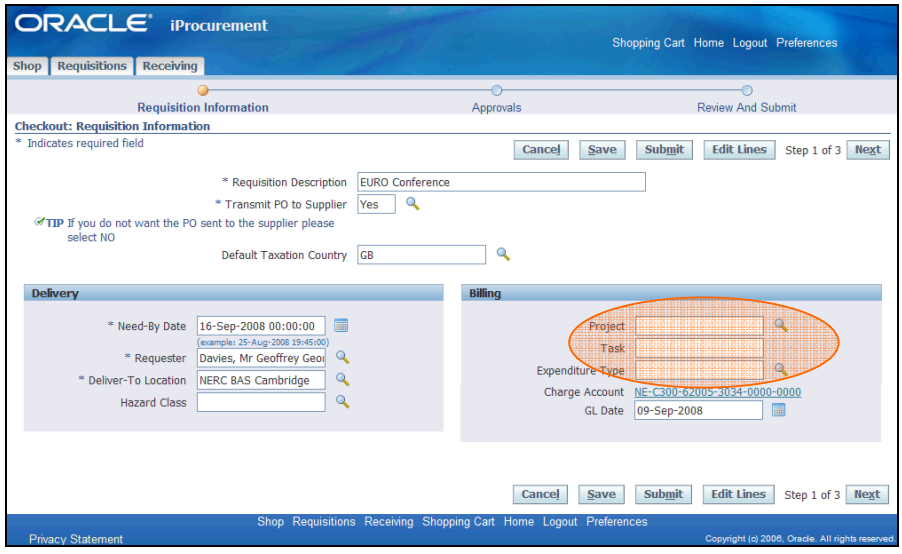
21. Click the Add to Cart button.



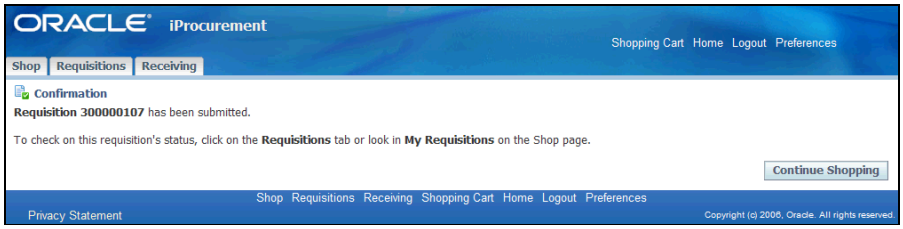
22. Click the **View Cart and Checkout** button.



23. Click the **Checkout** button.



24. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.

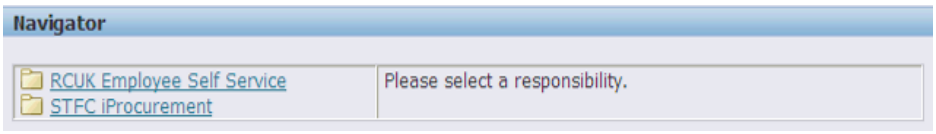


You should get a confirmation message similar to the one below:

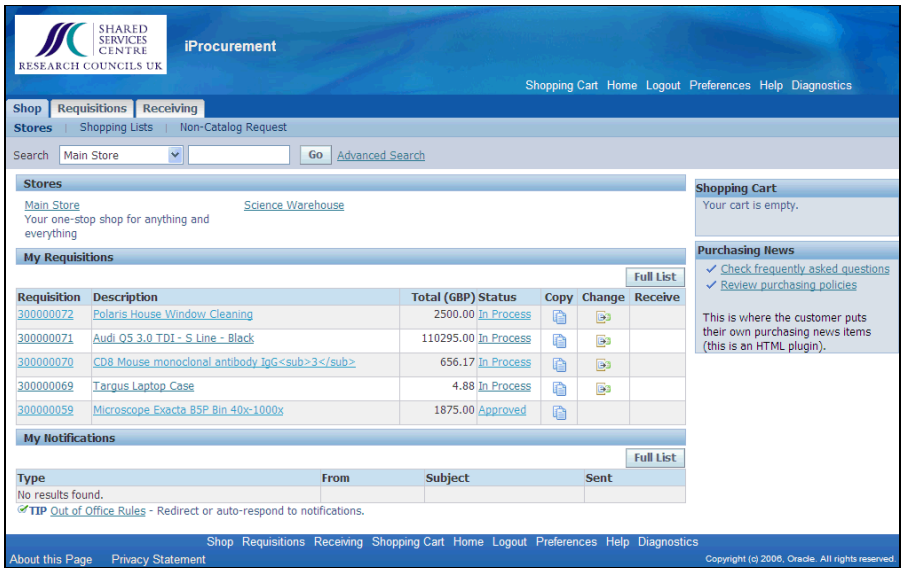
Confirmation
Requisition 300000107 has been submitted.

2.5 Non-Catalogue Request with a New Supplier

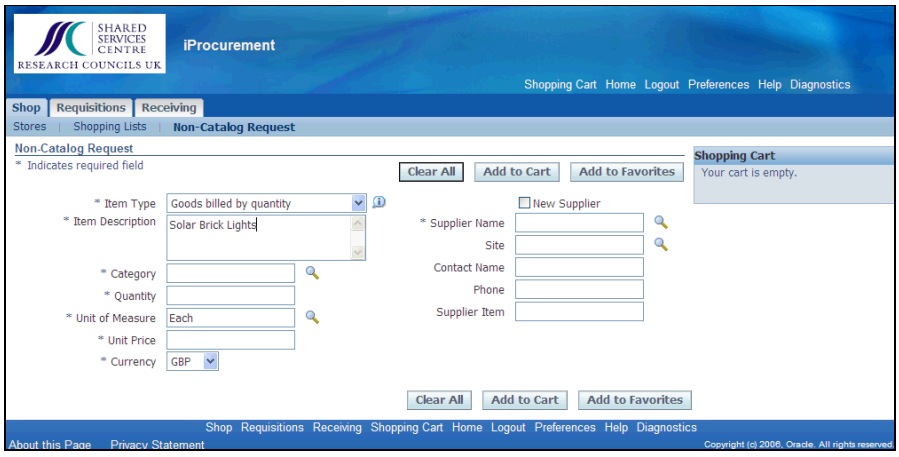
In this example we create a non-catalogue request for some solar brick lights from a supplier that currently does not exist on the system.



1. Click the **STFC iProcurement** link.



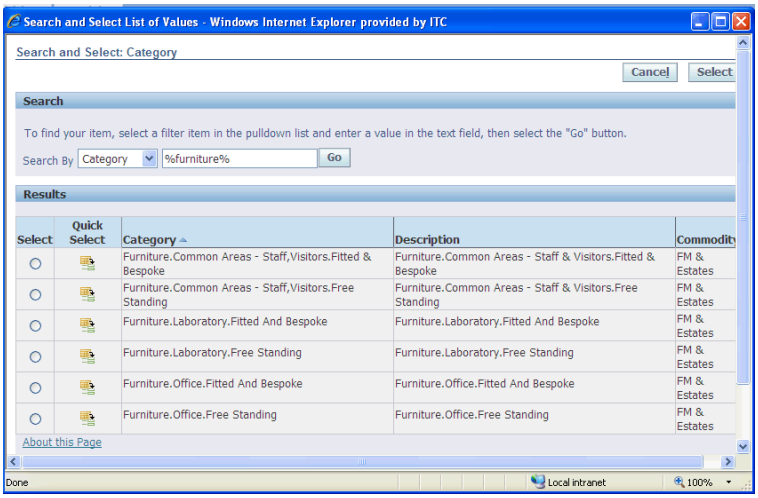
2. Click the **Non-Catalog Request** link.



3. Click in the **Item Description** field.

4. Enter the required information into the **Item Description** field. Enter a valid value e.g. "**Solar Brick Lights**".

5. Click the **Search for Category** button.

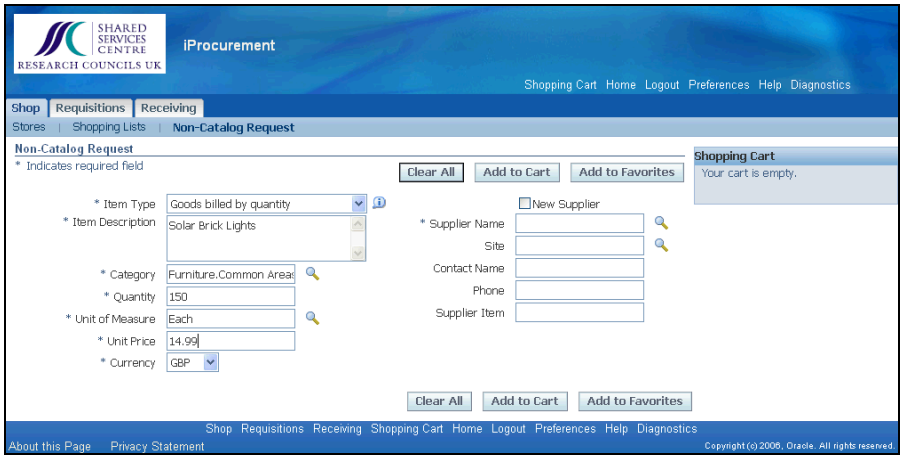


6. Click in the **Search By** field.

7. Enter the required information into the **Search By** field. Enter a valid value e.g. "**%furniture%**".

8. Click the **Go** button.

9. Click the **Quick Select** button to select **Furniture.Common Areas - Staff, Visitors.Fitted & Bespoke**.



10. Click in the **Quantity** field.

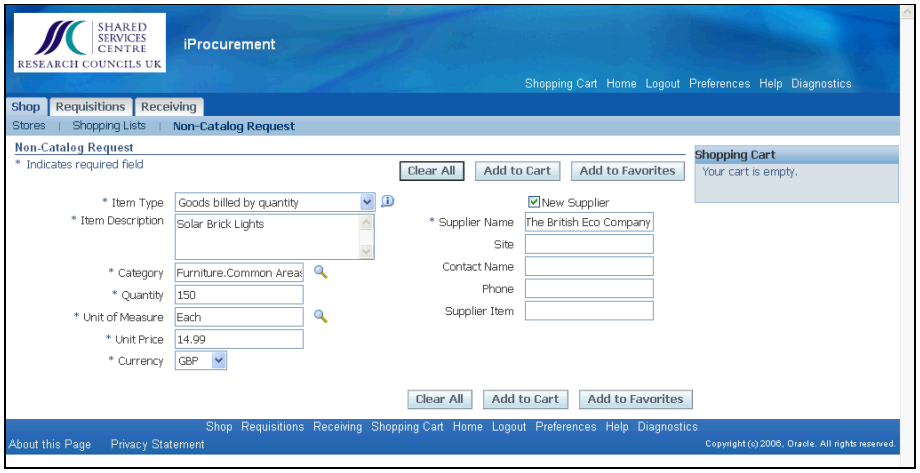
11. Enter the required information into the **Quantity** field.
Enter a valid value e.g. "**150**".

12. Click in the **Unit Price** field.

13. Enter the required information into the **Unit Price** field.
Enter a valid value e.g. "**14.99**".

14. Tick the **New Supplier** box.

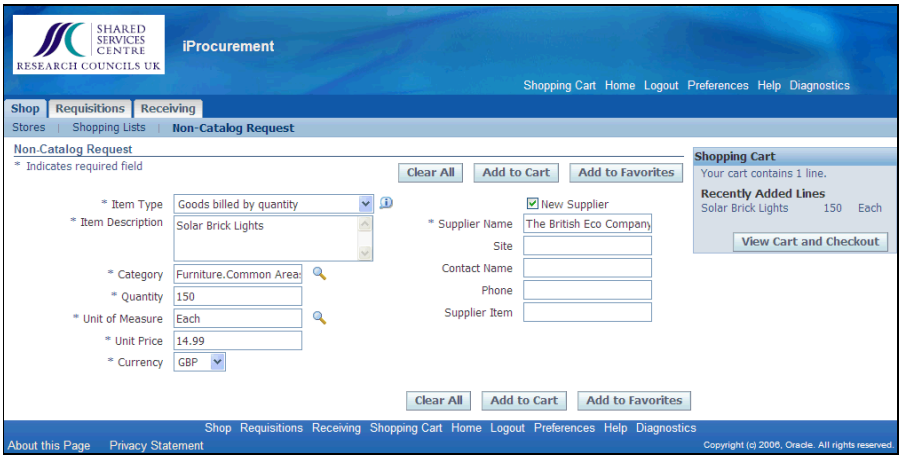
Ticking the new supplier box will allow you to key in your required supplier. Please note that the Procure to Pay team will also require you to fill in a ***new supplier form*** before a new supplier can be setup.



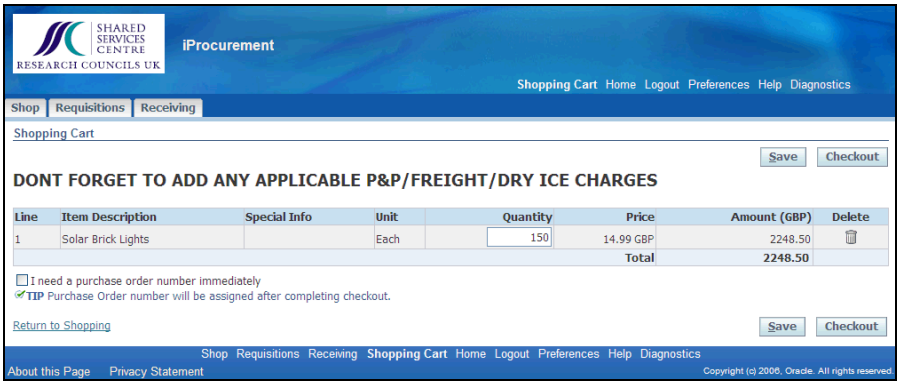
15. Click in the **Supplier Name** field.

16. Enter the required information into the **Supplier Name** field.
Enter a valid value e.g. "**The British Eco Company**".

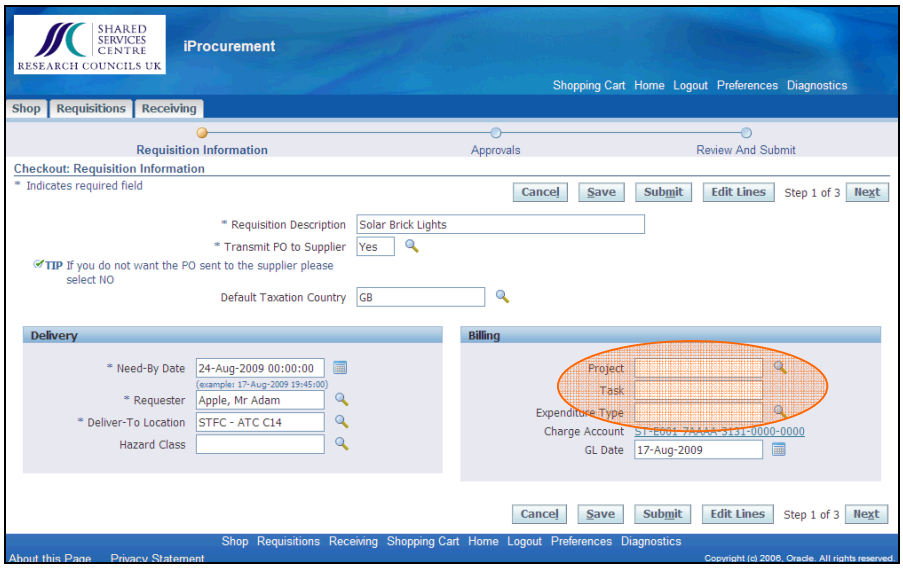
17. Click the Add to Cart button.



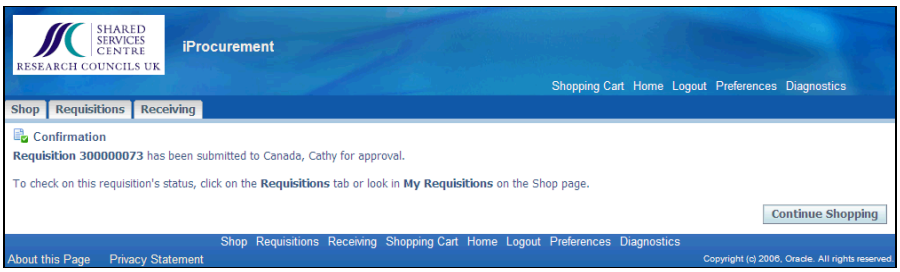
18. Click the View Cart and Checkout button.



19. Click the Checkout button.



20. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



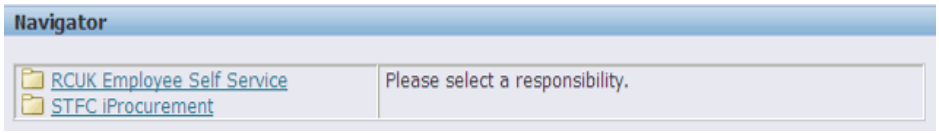
You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000073 has been submitted to Canada, Cathy for approval.

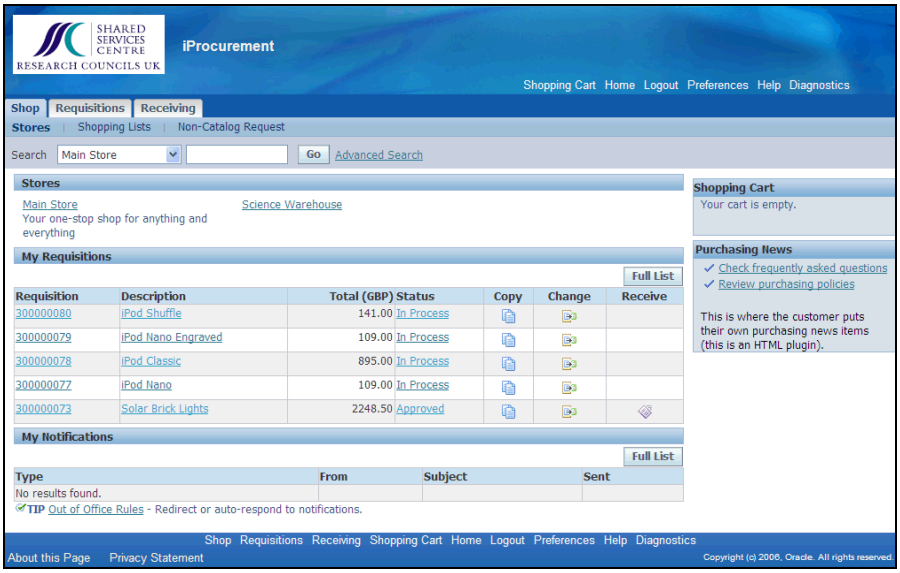
2.6 Amend a Requisition before a Purchase Order is Created

Requisition amendments may differ depending on what stage you decide to change your requisition. In this example we add an extra iPod onto an existing requisition that has not yet been processed into a purchase order.

Please note that amendments made to a requisition after a purchase order has been created will result in a change request which is sent to a buyer in the SSC.

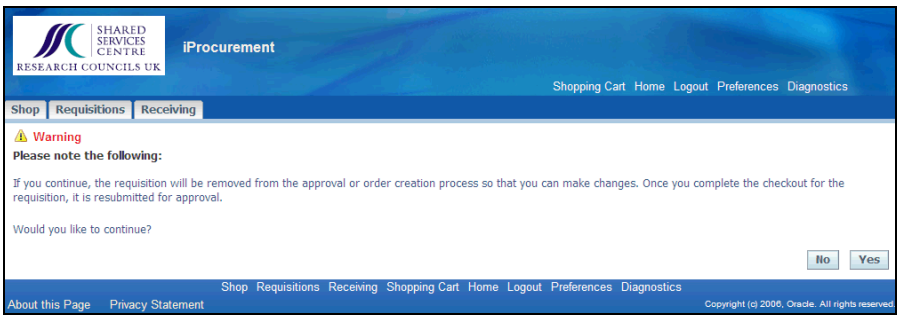


1. Click the **STFC iProcurement** link.

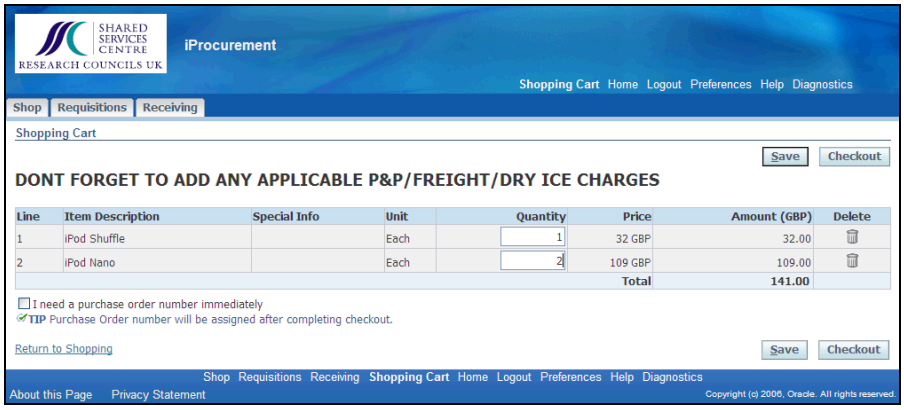


2. Click the **Change Requisitions** button next to requisition **300000080**.

   Alternatively you can find your requisition in the **Requisition** tab, select your chosen requisition and click on the **Change Requisition** button.



3. Click the Yes button.

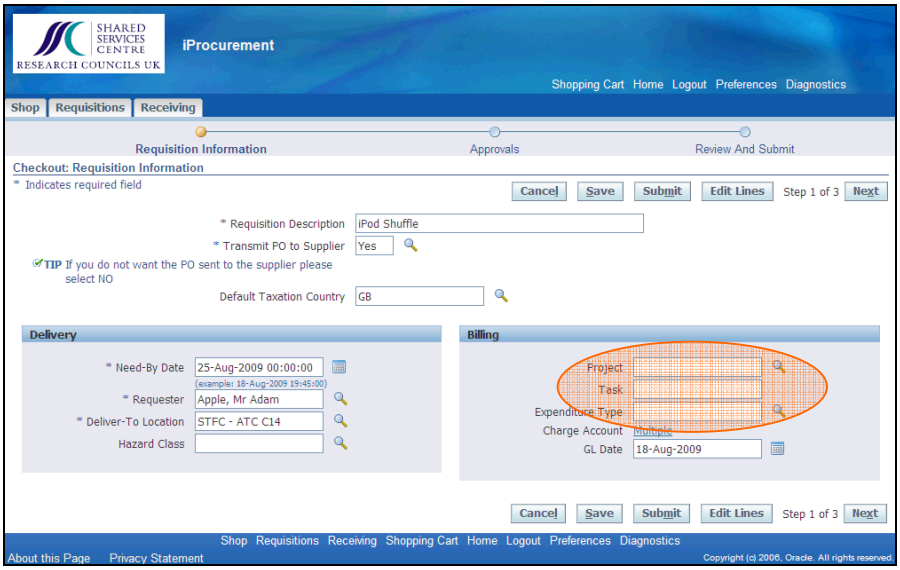


4. At this point you can add or delete items. To add a new item to your Shopping Cart click on the Shop tab.

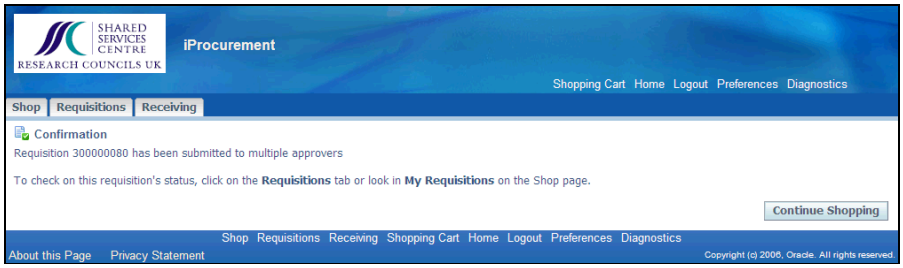
   Click in the **Quantity** field next to the **iPod Nano**.

5. Enter the required information into the **Quantity** field.
   Enter a valid value e.g. "**2**".

6. Click the Checkout button.



7. Ensure all the Project Information and Expenditure type is entered before you click the Submit button, else the system will not know the Project you're procuring against.



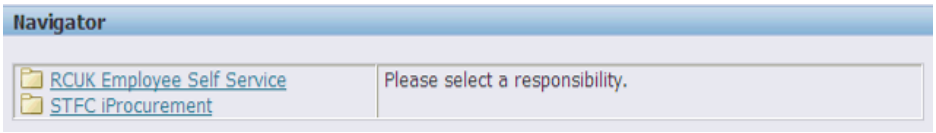
You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000080 has been submitted to multiple approvers.

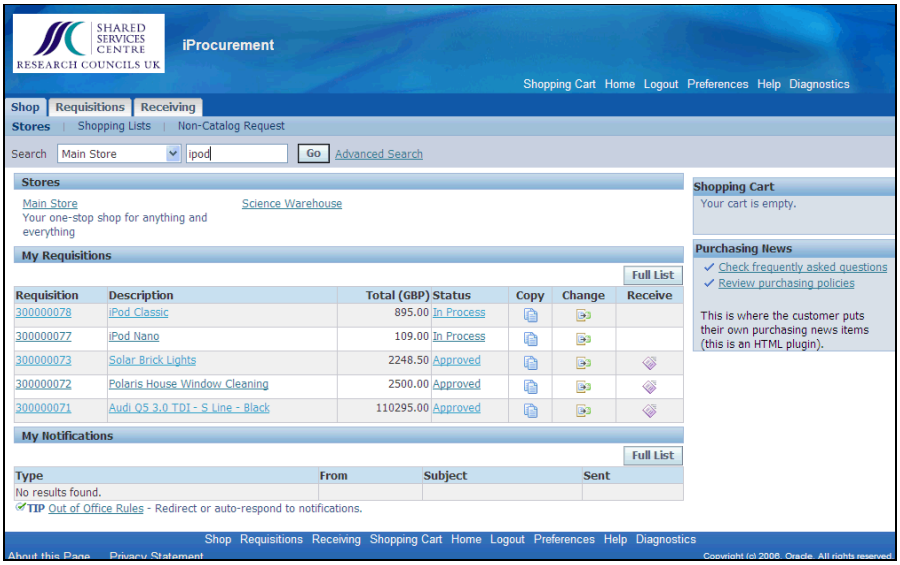
2.7 Adding Notes and Attachments to Requisitions

In this example we order an iPod that needs to be engraved.

We add notes to the supplier and an attachment with the engraving instructions. We also change the requisition description so we can easily find it later.



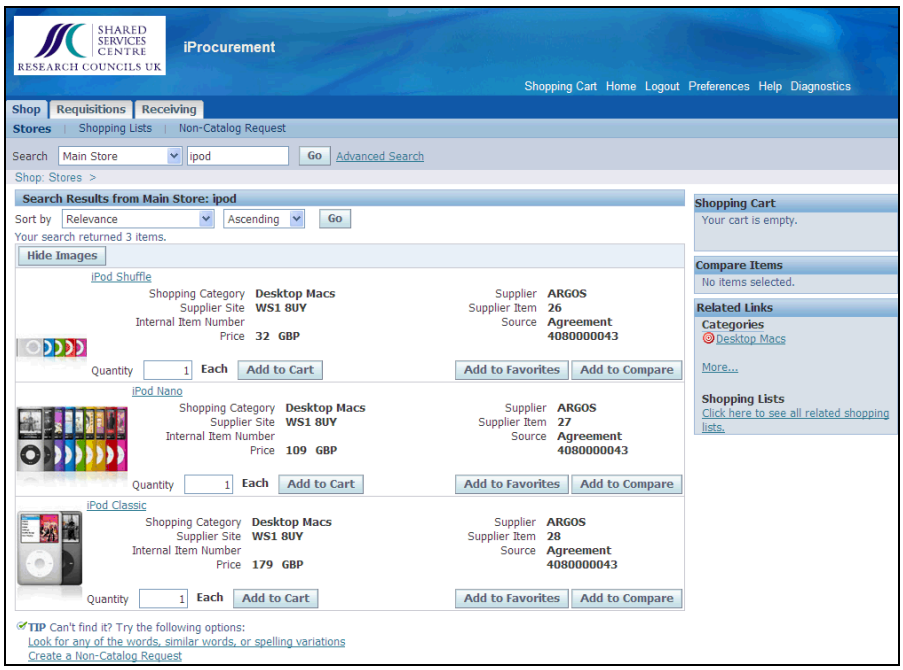
1. Click the **STFC iProcurement** link.



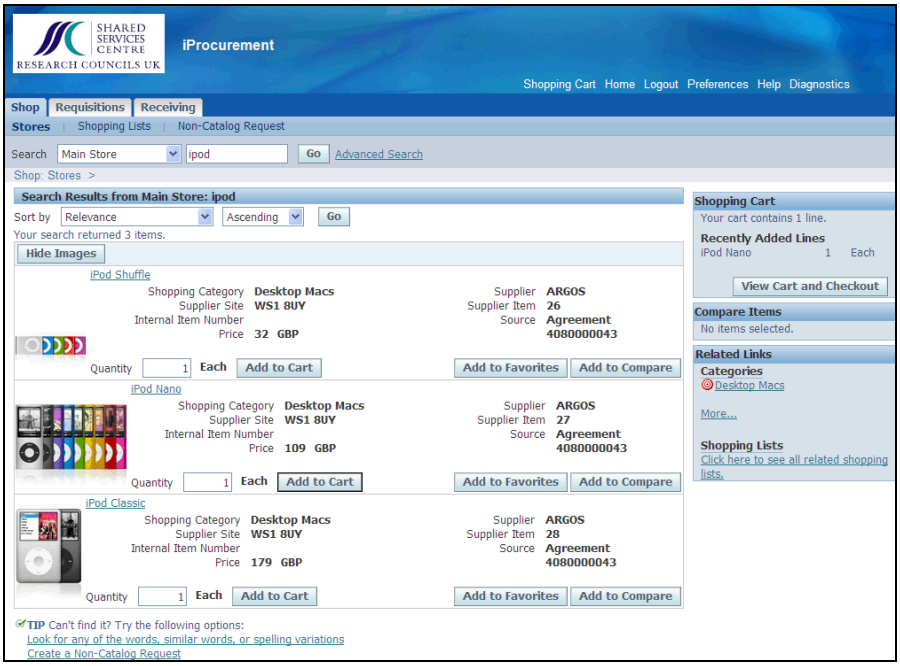
2. Click in the **Search** field.

3. Enter the required information into the **Search** field.
   Enter a valid value e.g. "**ipod**".

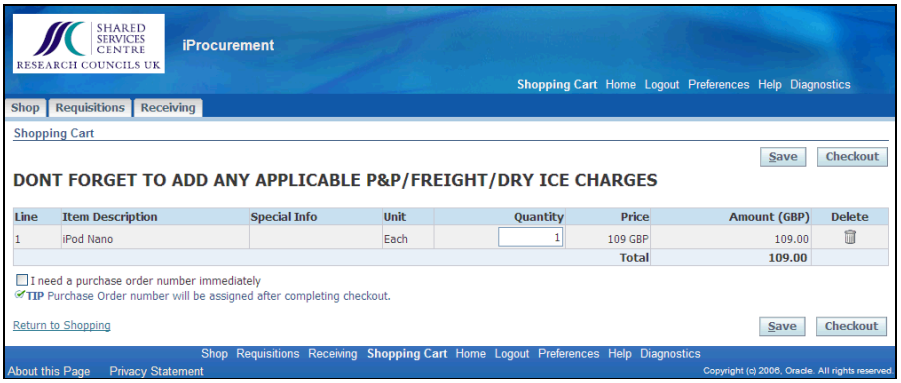
4. Click the Go button.



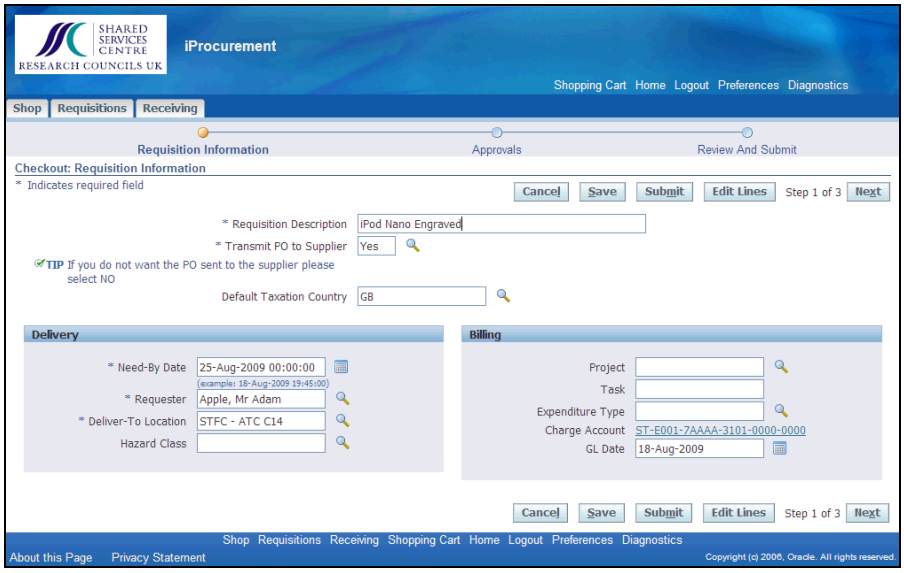
5. Click the Add to Cart button next to the **iPod Nano**.



6. Click the View Cart and Checkout button.



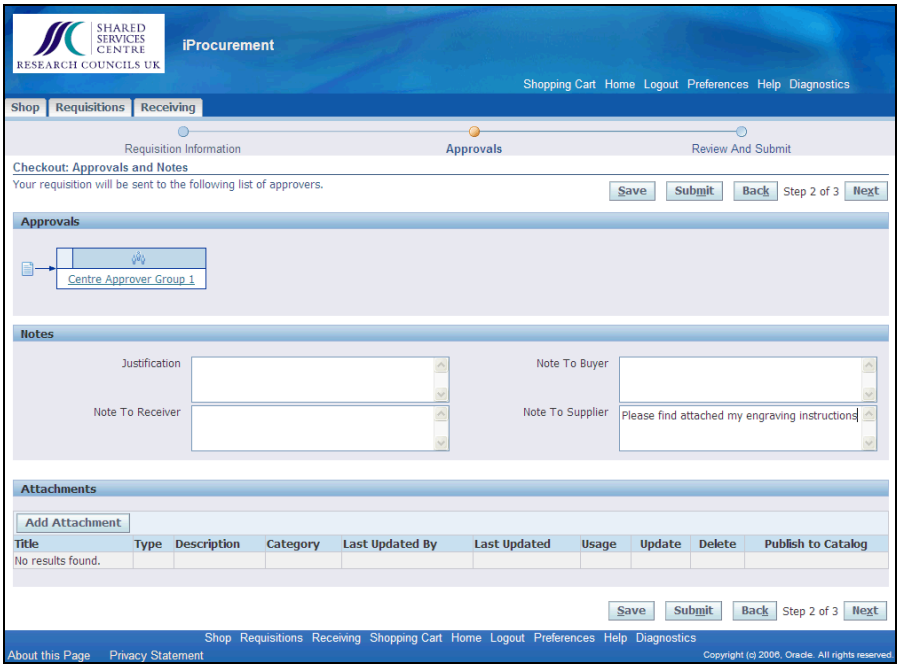
7. Click the Checkout button.



8. Click in the **Requisition Description** field.

9. Enter the required information into the **Requisition Description** field. Enter a valid value e.g. "**Engraved iPod Nano**".

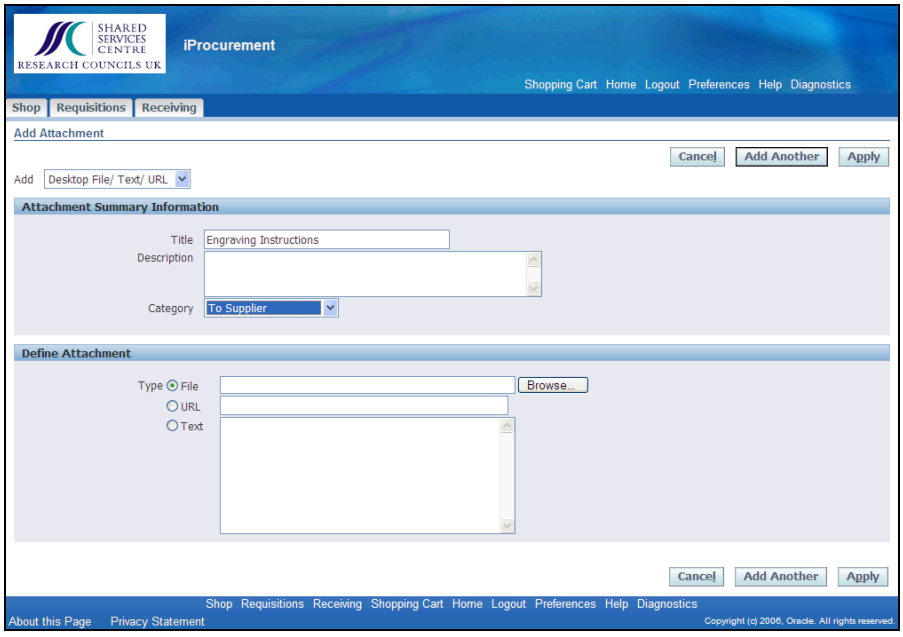
10. Click the Next button.



11. Click in the **Note To Supplier** field.

12. Enter the required information into the **Note To Supplier** field. Enter a valid value e.g. "**Please find attached my engraving instructions**".

13. Click the Add Attachment button.



14. Click in the **Title** field.

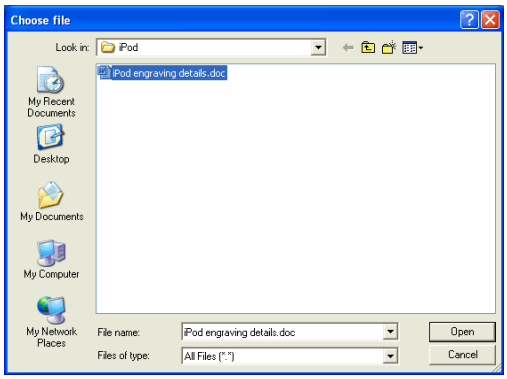
15. Enter the required information into the **Title** field.
Enter a valid value e.g. "**Engraving Instructions**".

Please be sure to select the correct category. For attachments such as quotations please leave the category as **Internal to Requisition** as this will stop the supplier seeing the attachment. You can also add an attachment that can be seen by the buyer but not the supplier. In this example we attach a file that can be seen by the supplier and all others who can see the order.

16. Click the **Category** drop-down list.

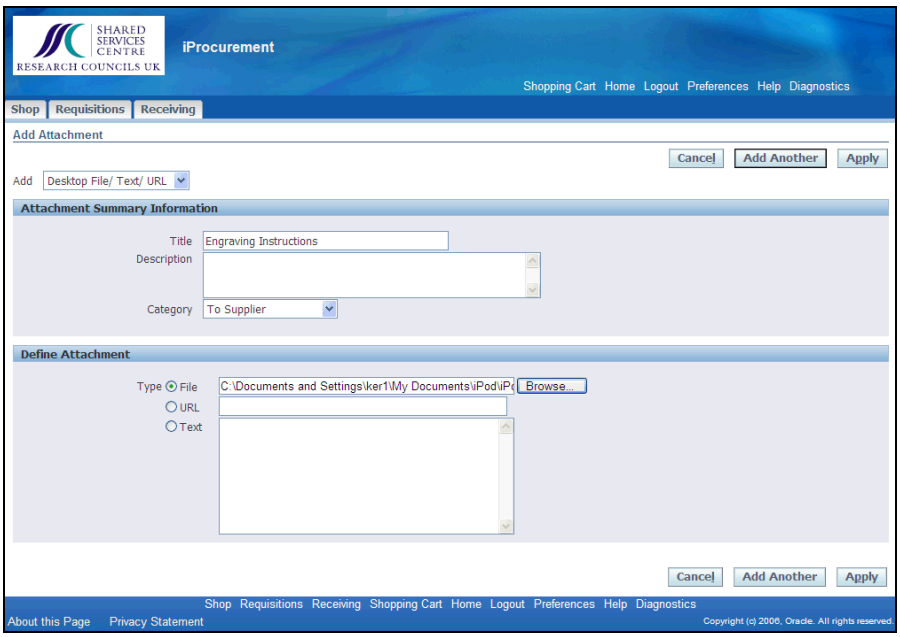
17. Click the **To Supplier** list item.

18. Click the Browse... button.

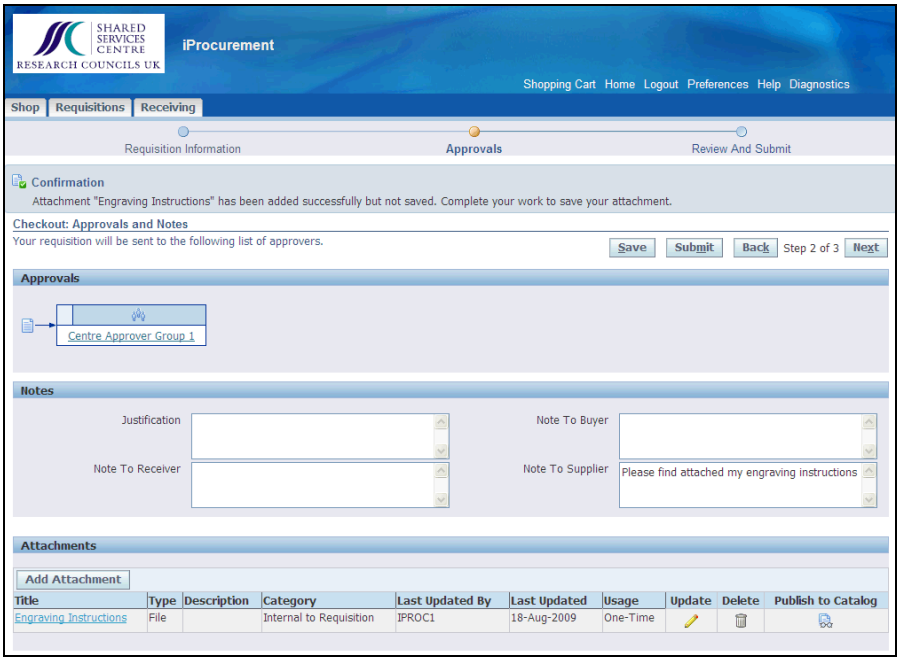


19. Browse to your file location.
Click the **iPod engraving details.doc** list item.

20. Click the Open button.



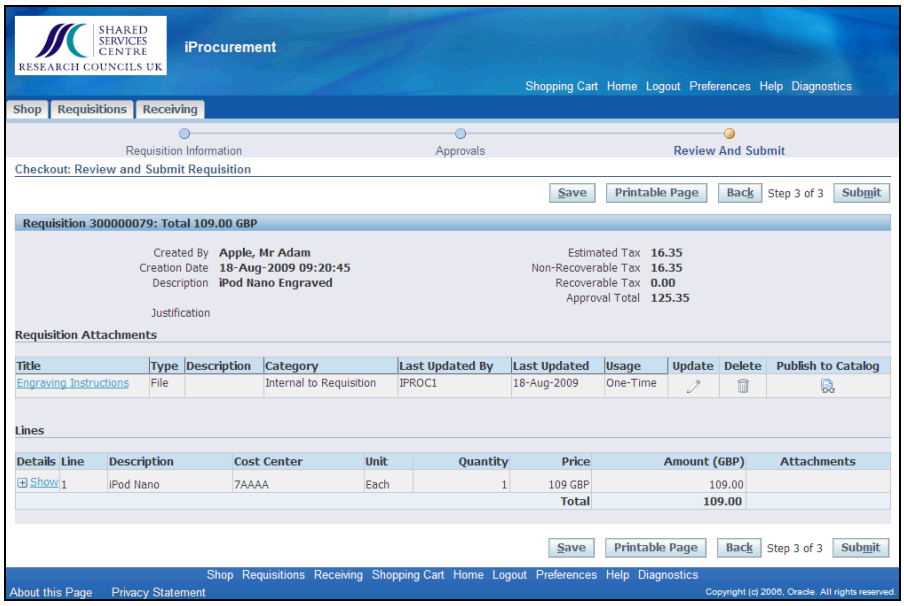
21. Click the **Apply** button.



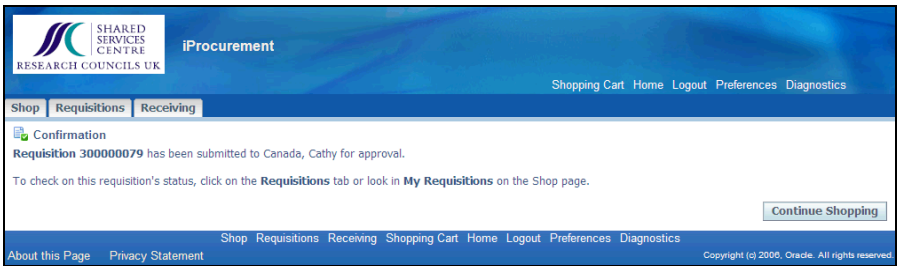
You should get a confirmation message similar to the one below:

Confirmation
Attachment “Engraving Instructions” has been added successfully but not saved. Complete your work to save your attachment.

22. Click the Next button.



23. Click the Submit button.



You should get a confirmation message similar to the one below:

Confirmation
Requisition 300000079 has been submitted to Canada, Cathy for approval.

3. Approving

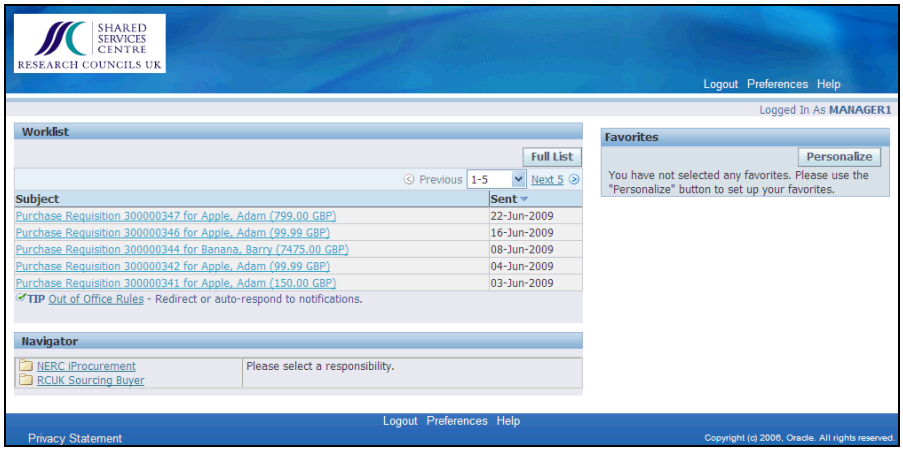
Approving

Before your requisition gets sent to the Procurement Team (non-catalogue requisitions) OR automatically gets turned into a purchase order and sent out to the supplier (catalogue or smart form requisitions) it must be approved.

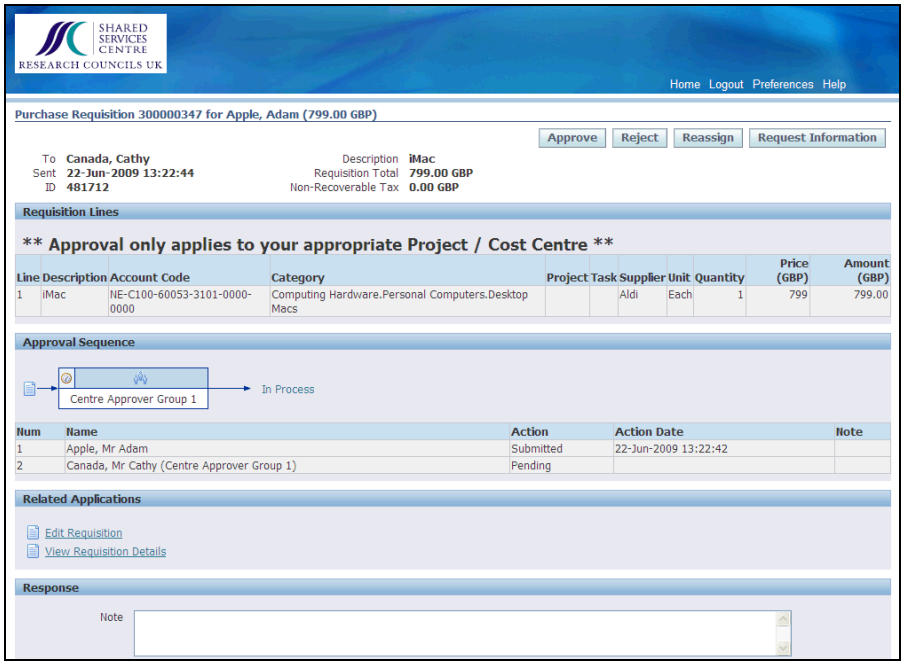
The approval management process will route your approval via the approval levels set by your Research Council.

3.1 Approve a Requisition

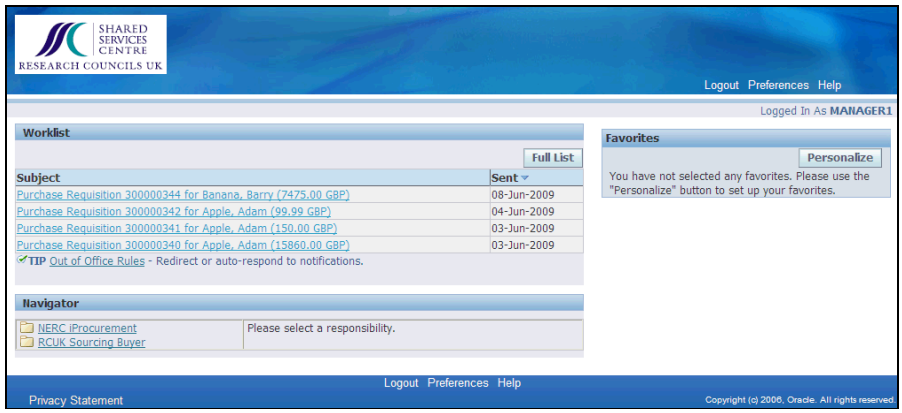
In this example the manager, Cathy Canada, approves the requisition for an Apple iMac.



1. Click the **Purchase Requisition 300000347 for Apple, Adam (799.00 GBP)** link.



2. Click the **Approve** button.



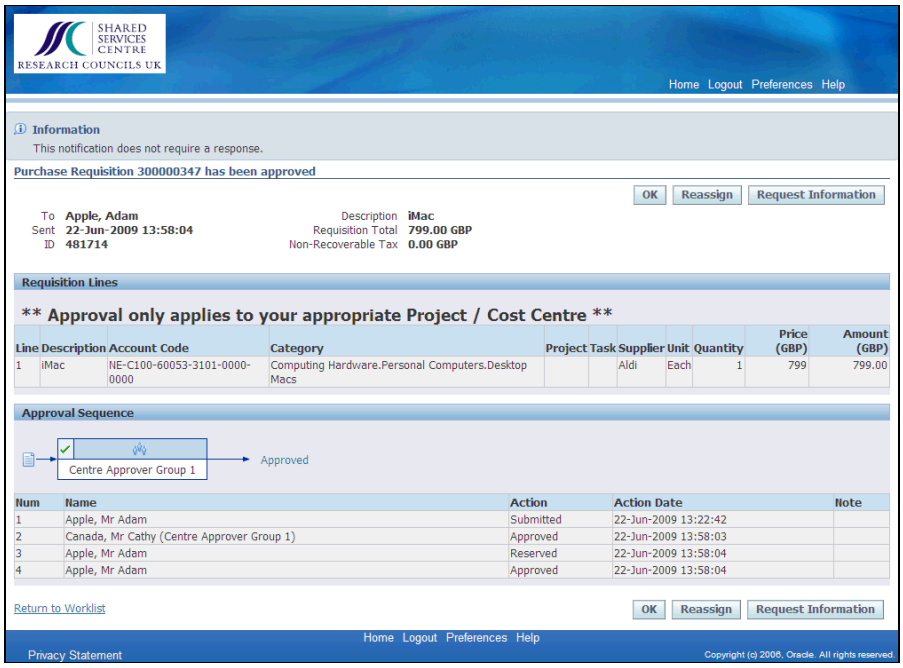
Once approved the requisition will then disappear from your Worklist.

3.2 View an Approved Requisition

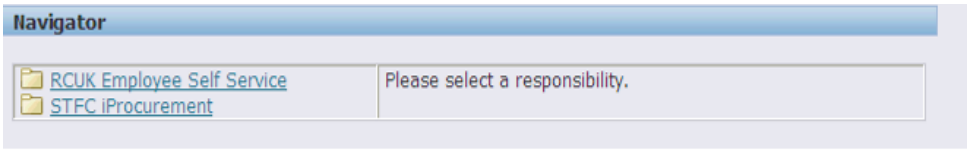
There are two ways of checking whether or not your requisition has been approved:

- Checking for notifications which tell you the item has been approved
- Checking the item status in iProcurement

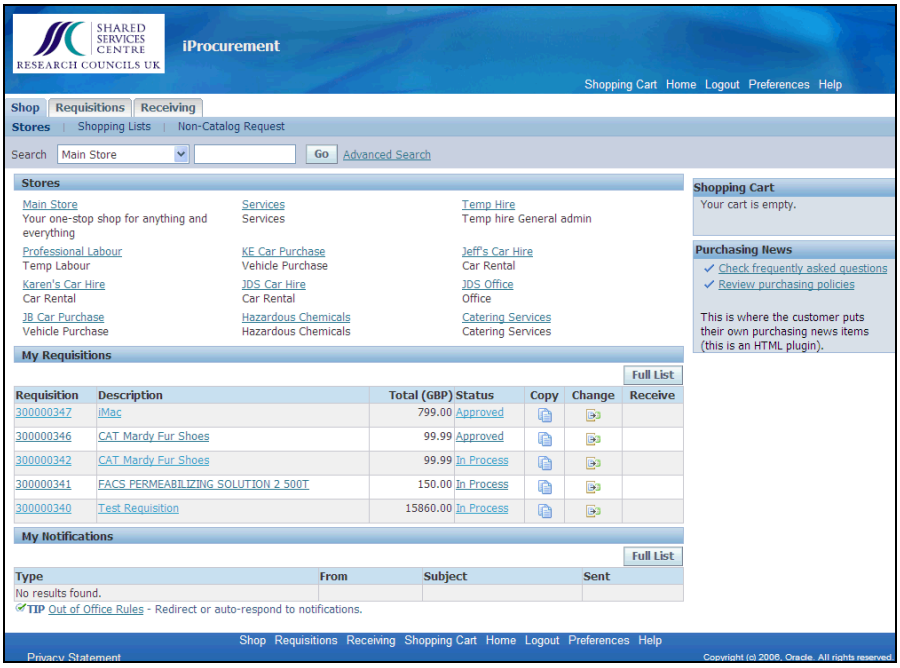
1. You get a notification when your requisition has been approved. Click the **Purchase Requisition 300000347 has been approved** link.



2. Click the OK button.



3. Click the **STFC iProcurement** link.

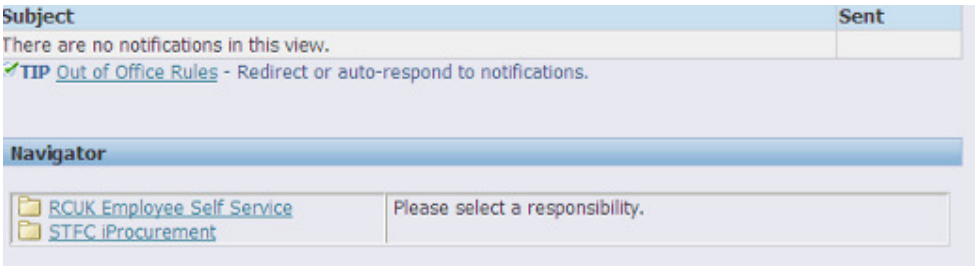


4. Notice that Requisition 300000347 has got an "**Approved**" Status.

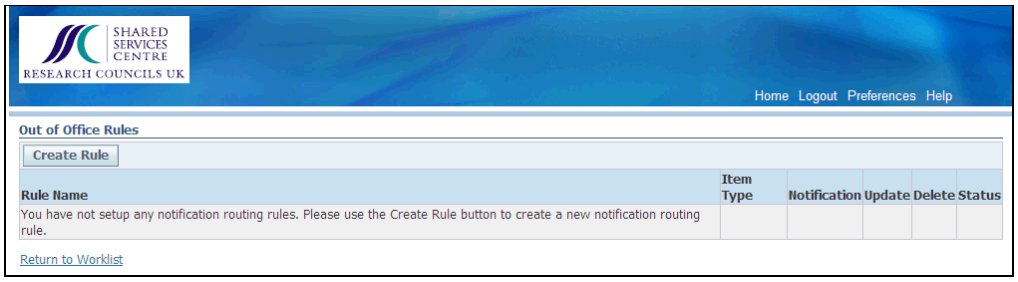
3.3 Setting Vacation Rules

For periods of absence it is important that Vacation Rules are set to enable notifications to be redirected to a specified person.

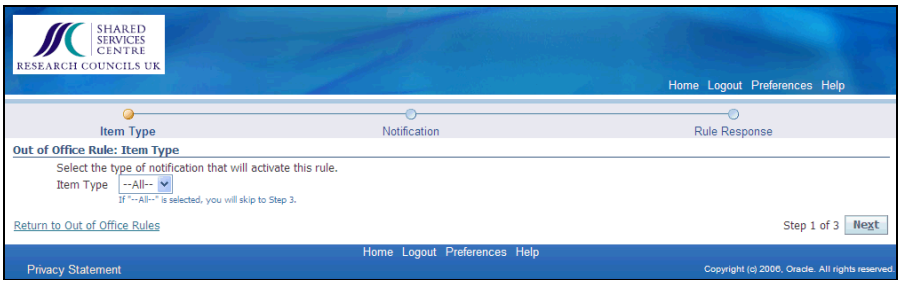
In this example we set a rule that delegates all approvals to another member of staff for a set period of time.



1. Click the **Out of Office Rules** link.

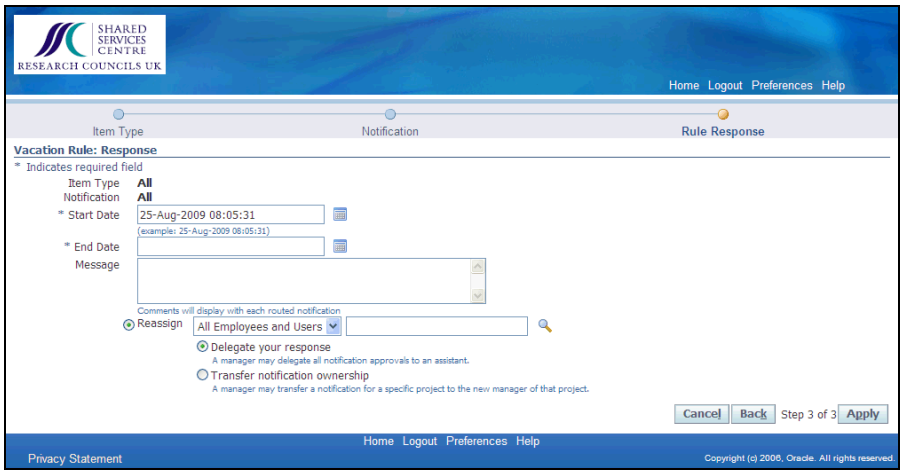


2. Click the Create Rule button.

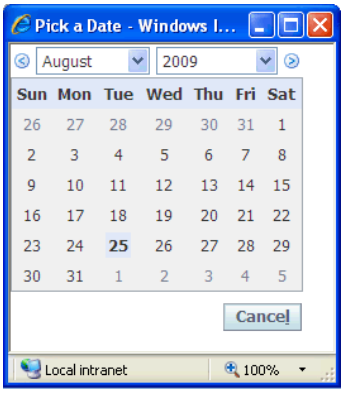


3. In this example we are redirecting all notifications, but it is possible to only redirect requisition notifications by selecting **Requisition** from the **Item Type** list.

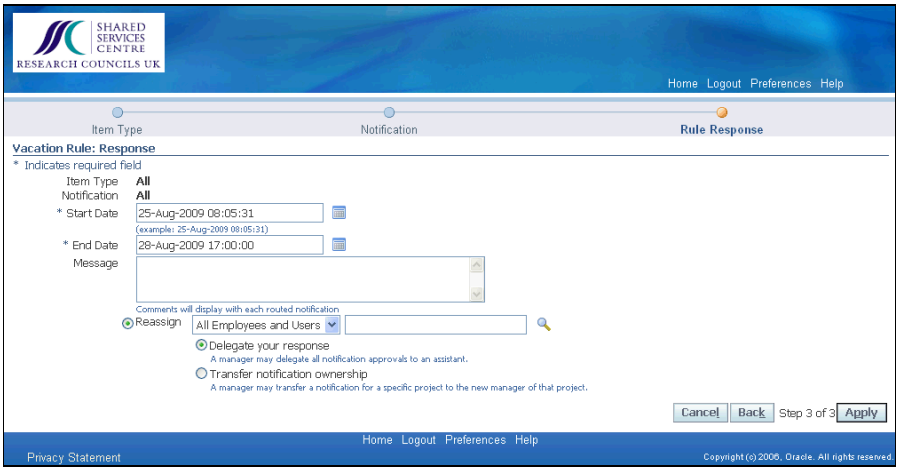
   Click the Next button.



4. Click the **End Date** button.



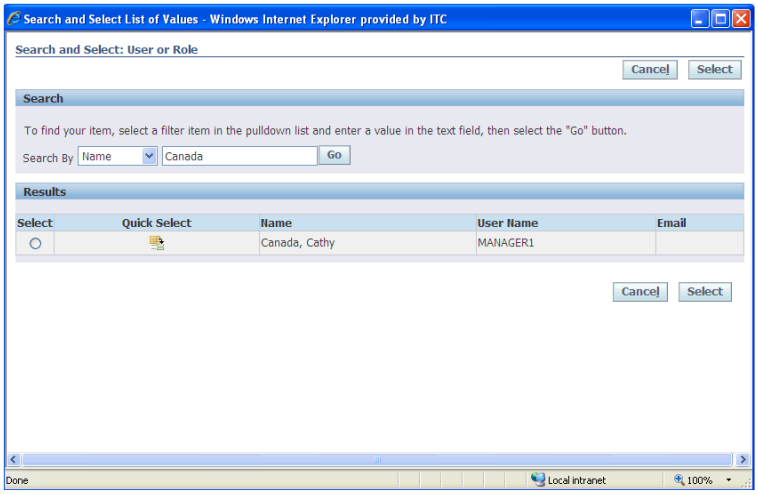
5. Select the appropriate date.
E.g. Click the **28** link.



6. Click in the **End Date** field.

7. Enter the required information into the **End Date** field.
Enter a valid value e.g. "**17:00:00**".

8. Click the **Search for Employees and Users** button.

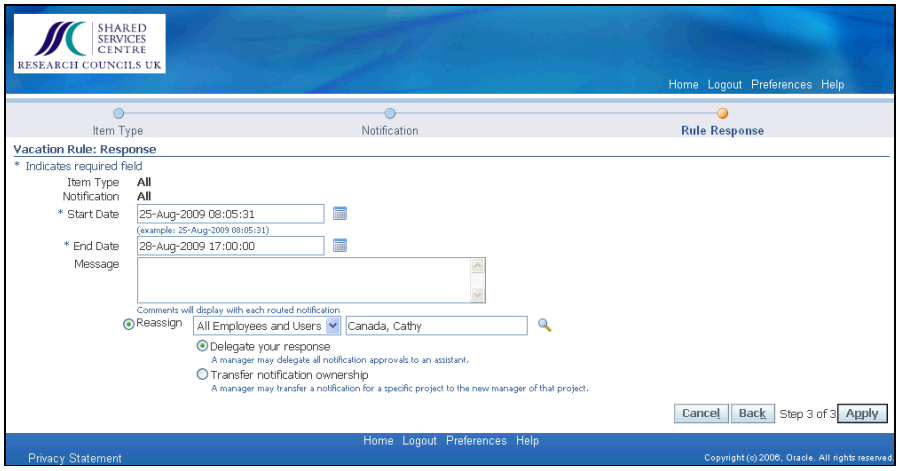


9. Click in the **Search By** field.

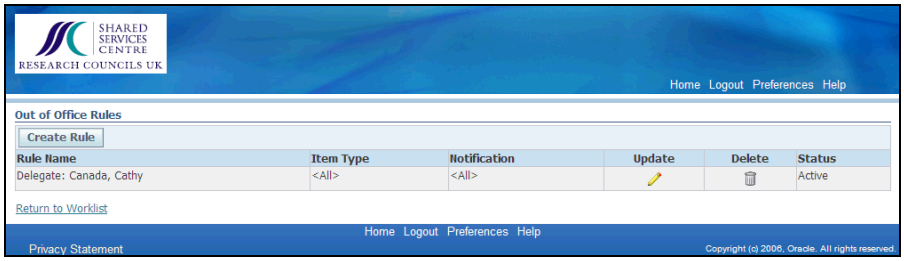
10. Enter the required information into the **Search By** field.
Enter a valid value e.g. "**Canada**".

11. Click the Go button.

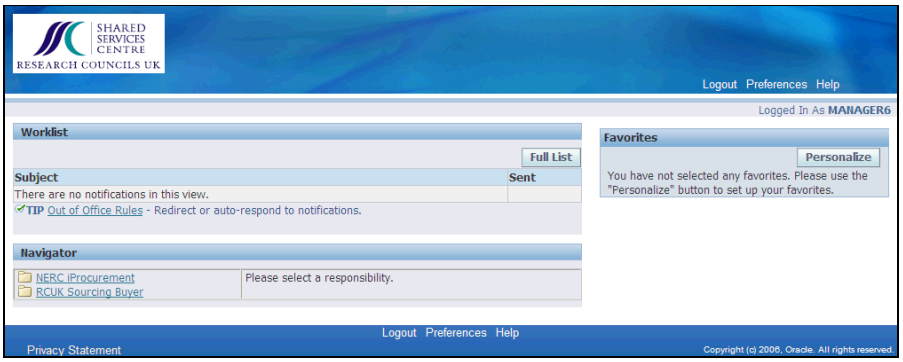
12. Click the **Quick Select** button to select **Canada, Cathy**.



13. Click the Apply button.



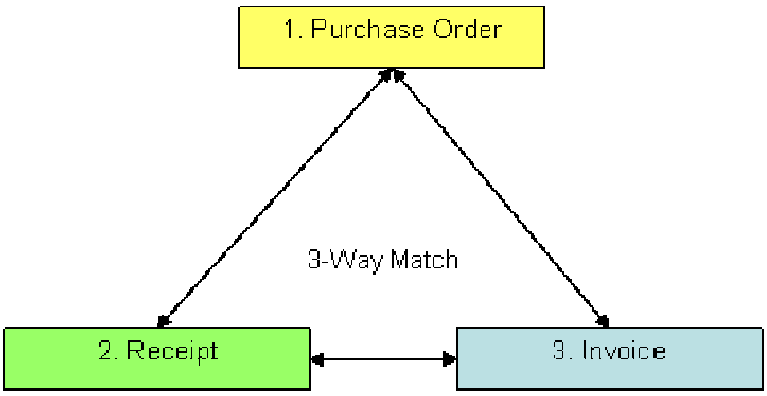
14. Click the **Return to Worklist** link.



4. Receipting

It is extremely important to receipt your goods or services once you have received them. If you do not do this the payment of your supplier's invoice may be delayed. If you forget, Oracle will send you a notification to remind you.

The SSC and the Research Councils is using the 3-way match system. The 3-way match means that the goods or services receipt must match the purchase order and the invoice before the supplier is paid.

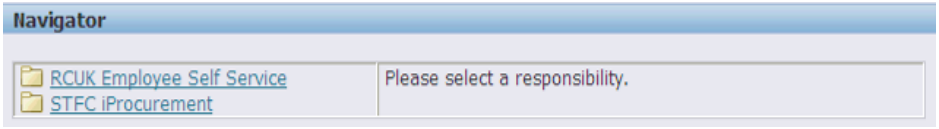


In this section we cover:

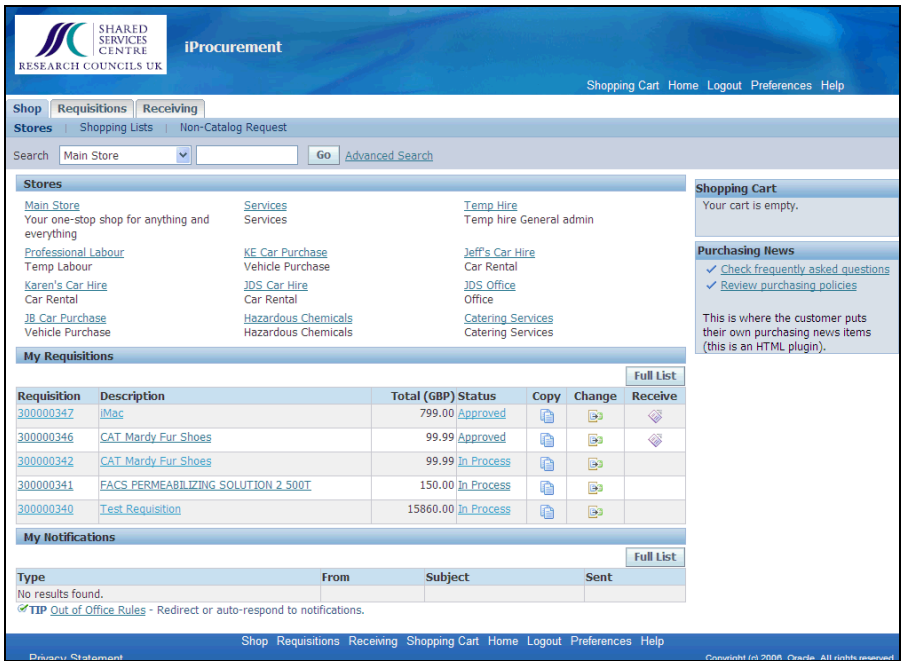
- Full Receipt
- Part Receipt
- Amending a Receipt

4.1 Full Receipt – Goods

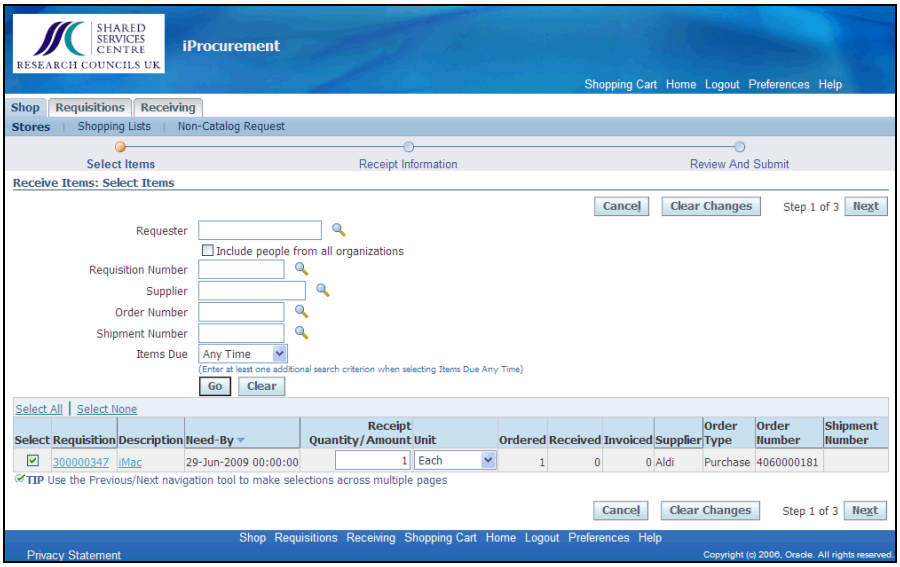
In this example we receipt the Apple iMac.



1. Click the **STFC iProcurement** link.



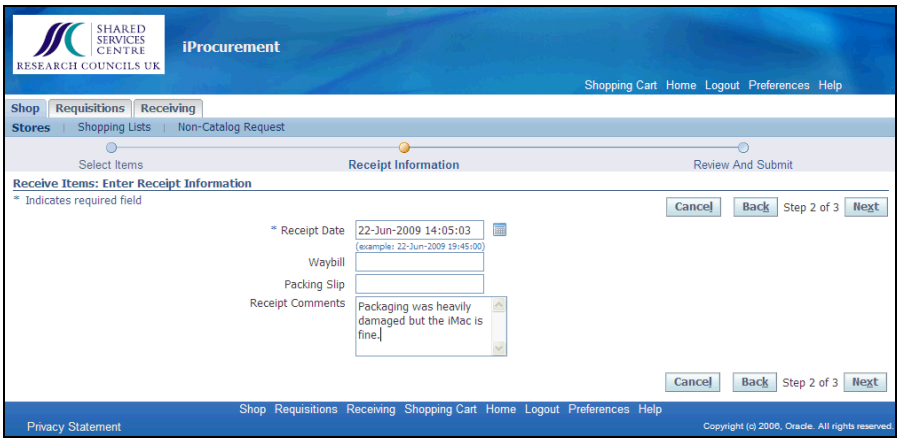
2. Click the **Receive** button on the iMac line.
If you cannot find the item you wish to receive on this list you can click on the **Receiving** tab and click on **Full List**.



3. Select the appropriate order.
E.g. Tick the **300000347** box.

4. Enter the desired information into the **Receipt Quantity/Amount** field.
Enter a valid value e.g. "**1**".

5. Click the Next button.

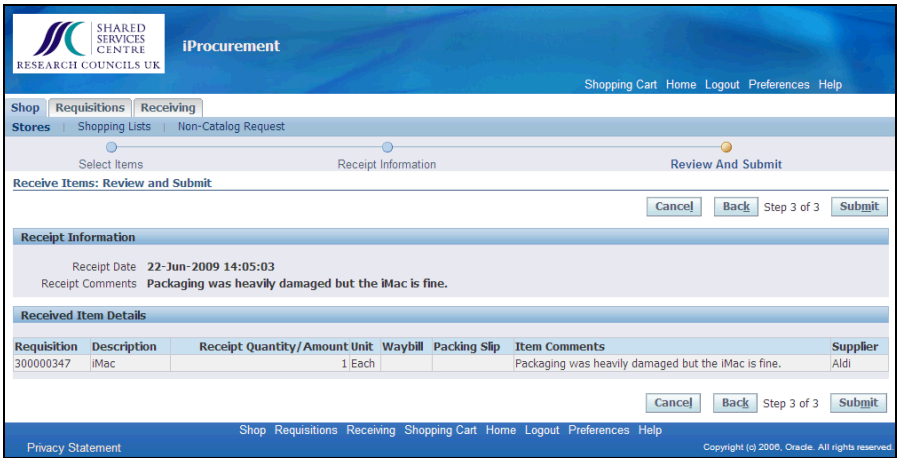


6. Click in the **Receipt Comments** field.

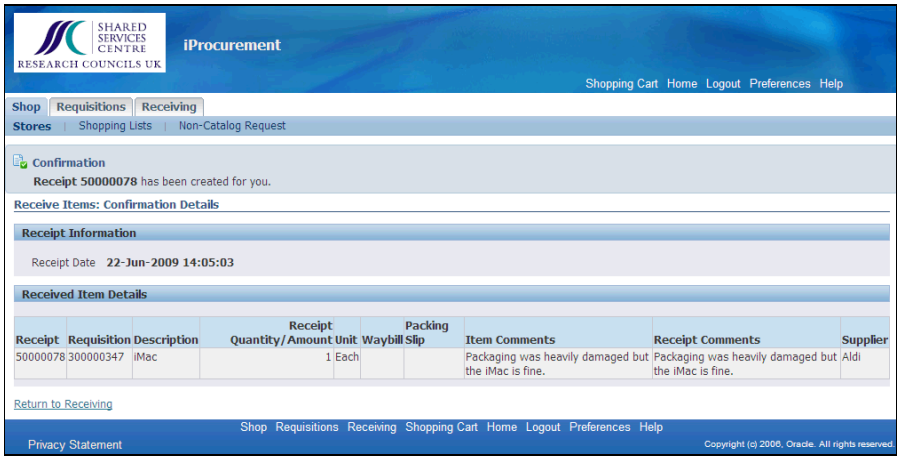
7. Enter the desired information into the **Receipt Comments** field.
Enter a valid value e.g. "**Packaging was heavily damaged but the iMac is fine.**".

Enter the Waybill (tracking number) and Packing Slip numbers if you have any.

8. Click the Next button.



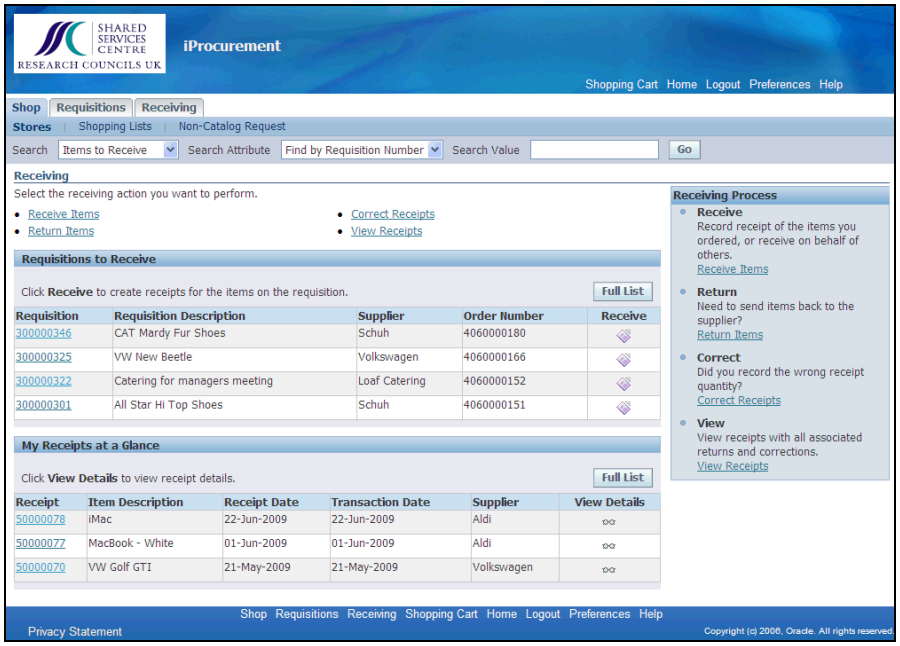
9. Click the Submit button.



You should get a confirmation message similar to the one below:

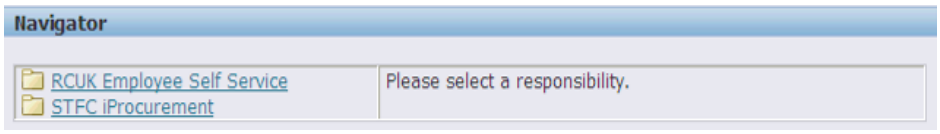
Confirmation
Receipt 50000078 has been created for you.

10. Click the **Return to Receiving** link.

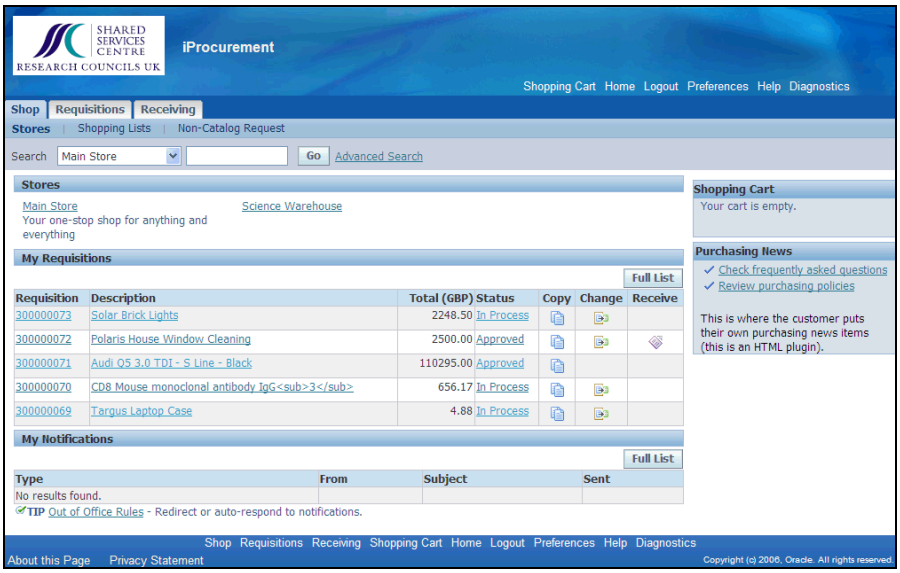

SHARED SERVICES CENTRE
RESEARCH COUNCILS UK
iProcurement
Shopping Cart Home Logout Preferences Help
Shop Requisitions Receiving
Stores | Shopping Lists | Non-Catalog Request
Search Items to Receive Search Attribute Find by Requisition Number Search Value Go
Receiving
Select the receiving action you want to perform.
Receive Items
Return Items
Correct Receipts
View Receipts
Requisitions to Receive
Click Receive to create receipts for the items on the requisition.
Full List
Requisition Requisition Description Supplier Order Number Receive
300000346 CAT Mardy Fur Shoes Schuh 4060000180
300000325 VW New Beetle Volkswagen 4060000166
300000322 Catering for managers meeting Loaf Catering 4060000152
300000301 All Star Hi Top Shoes Schuh 4060000151
My Receipts at a Glance
Click View Details to view receipt details.
Full List
Receipt Item Description Receipt Date Transaction Date Supplier View Details
50000078 iMac 22-Jun-2009 22-Jun-2009 Aldi
50000077 MacBook - White 01-Jun-2009 01-Jun-2009 Aldi
50000070 VW Golf GTI 21-May-2009 21-May-2009 Volkswagen
Receiving Process
Receive
Record receipt of the items you ordered, or receive on behalf of others.
Receive Items
Return
Need to send items back to the supplier?
Return Items
Correct
Did you record the wrong receipt quantity?
Correct Receipts
View
View receipts with all associated returns and corrections.
View Receipts
Shop Requisitions Receiving Shopping Cart Home Logout Preferences Help
Privacy Statement
Copyright (c) 2006, Oracle. All rights reserved.

4.2 Part Receipt – Services

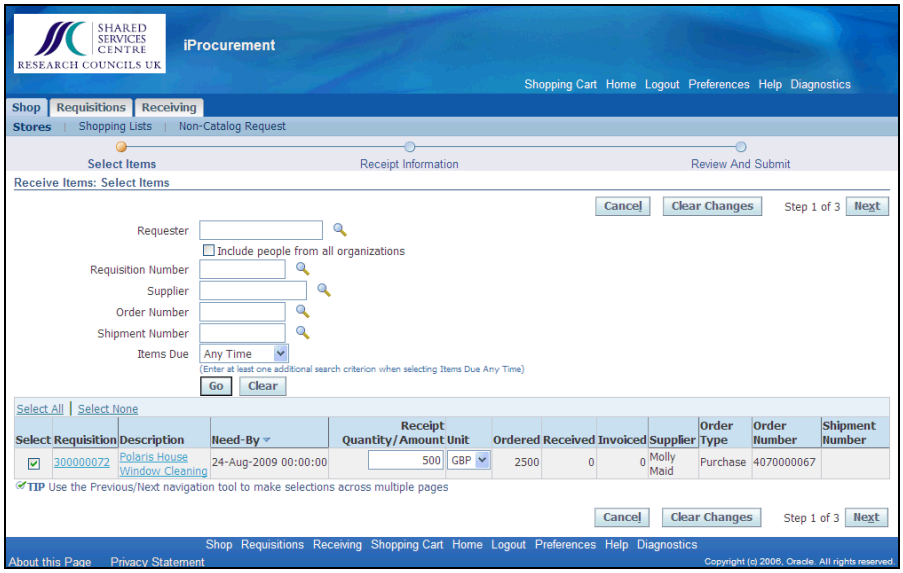
In this example we receipt £500 worth of window cleaning. The original requisition was for £2500.



1. Click the **STFC iProcurement** link.



2. Click the **Receive Requisitions** button next to the Polaris House Window Cleaning line.



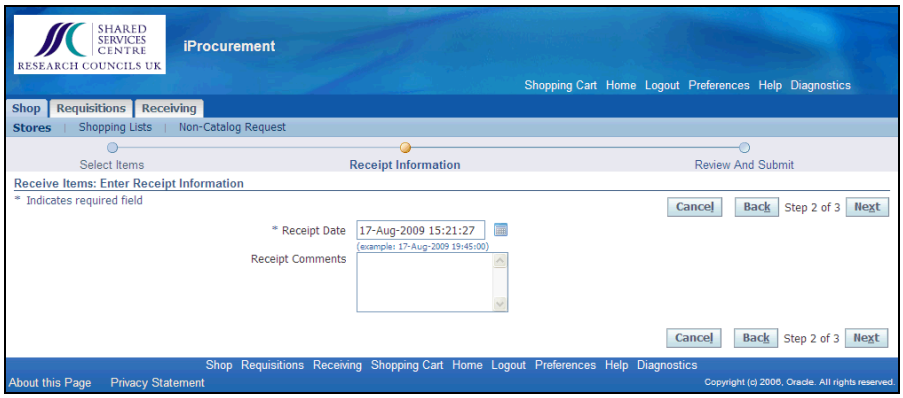
3. Tick the **300000072** box.

4. Click in the **Receipt Quantity/Amount** field.

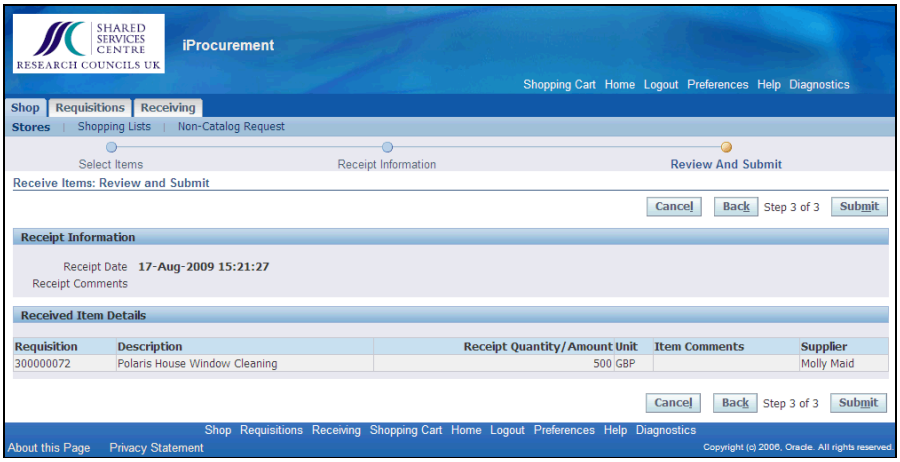
5. Press **[Delete]**.

6. Enter the required information into the **Receipt Quantity/Amount** field. Enter a valid value e.g. "**500**".

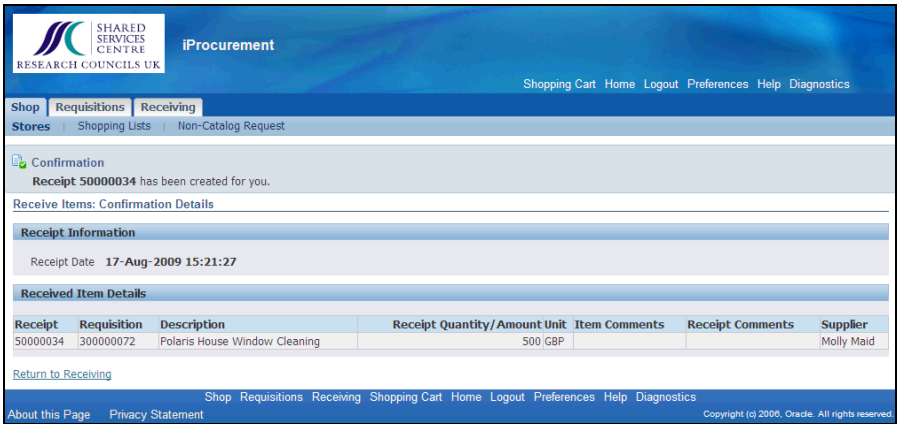
7. Click the Next button.



8. Click the Next button.



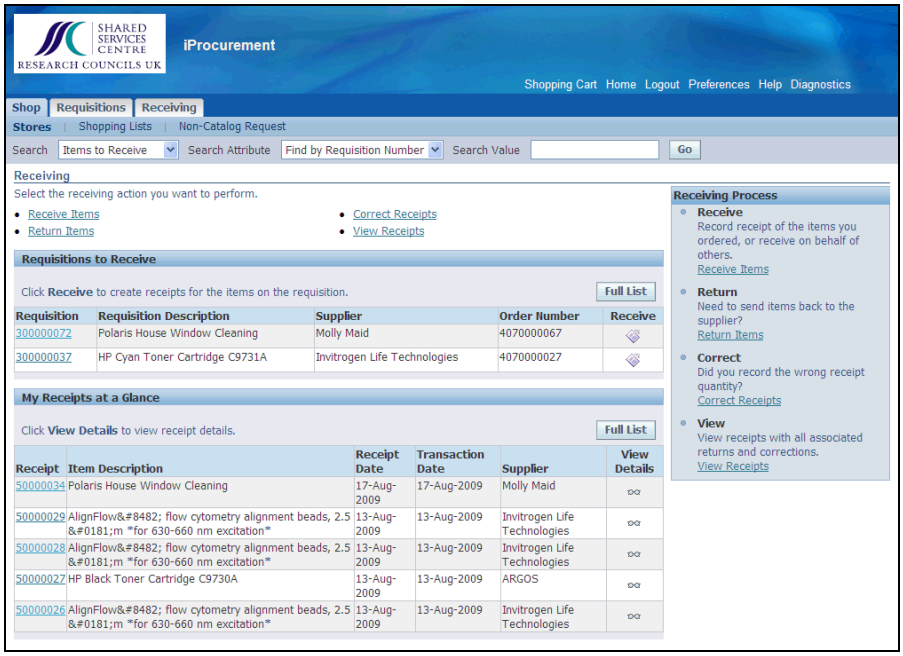
9. Click the Submit button.



You should get a confirmation message similar to the one below:

Confirmation
Receipt 50000034 has been created for you.

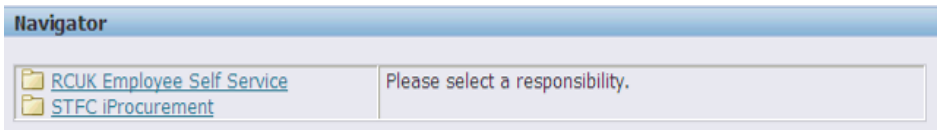
10. Click the **Return to Receiving** link.



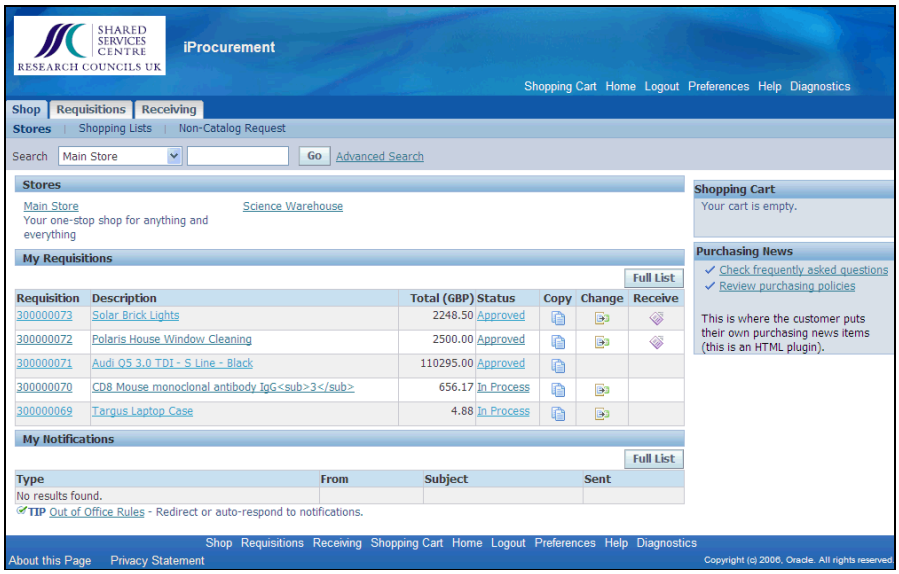
When you do a part receipt you will have a receipt for the part you receipted and the requisition will still be listed in the “Requisitions to Receive” list to receipt the remained for the item. In this example you can see ***Polaris House Window Cleaning*** under both Requisitions to Receive and My Receipts at a Glance.

4.3 Amend/Correct a Receipt

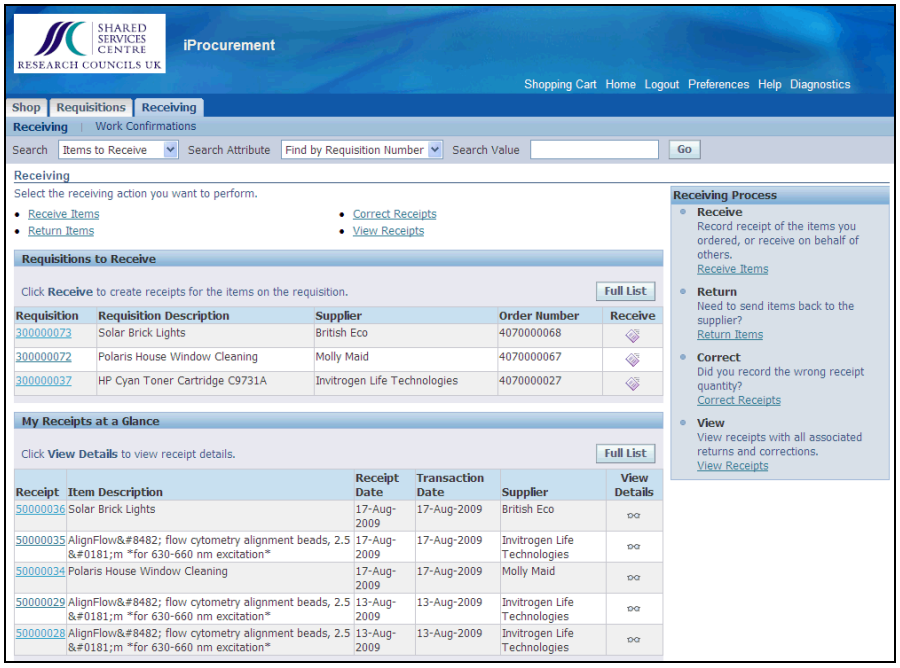
In this example we correct a receipt where we receipted 99 solar bricks instead of 100.



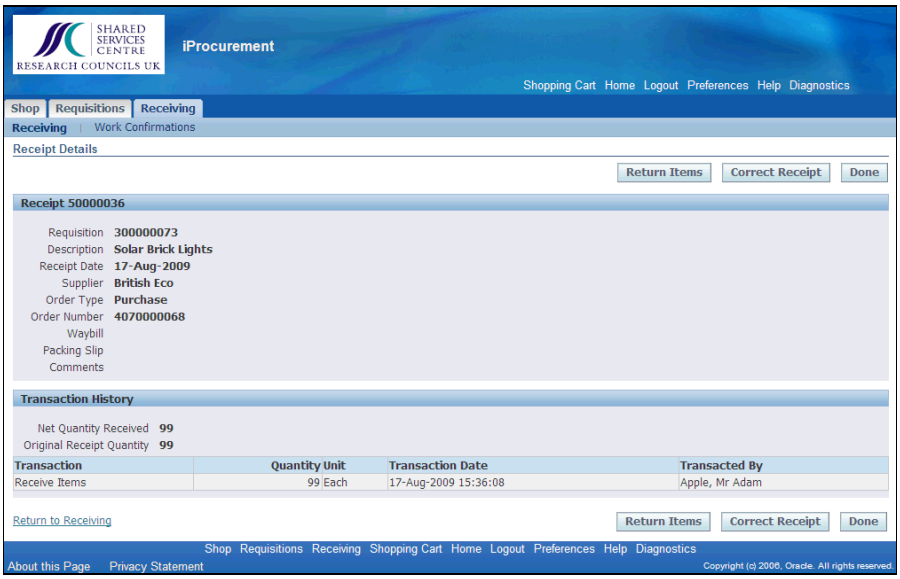
1. Click the **STFC iProcurement** link.



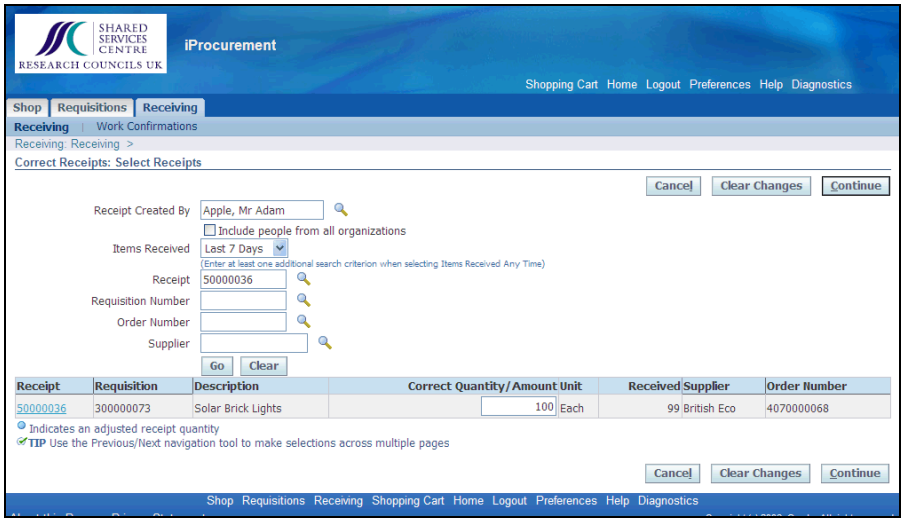
2. Click the **Receiving** link.



3. Select the appropriate receipt under **My Receipts at a Glance**. Click the **50000036** link.



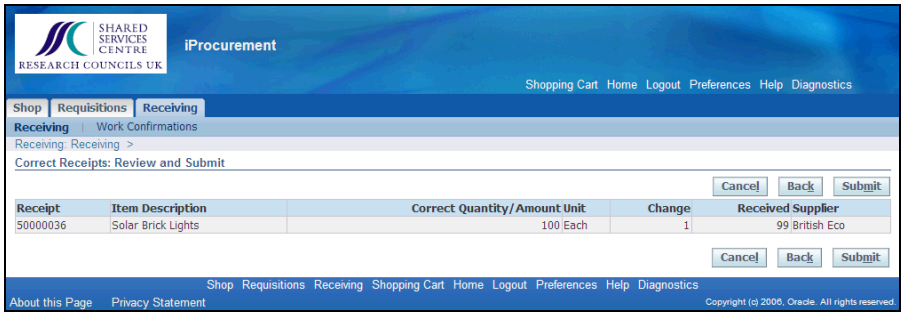
4. Click the Correct Receipt button.



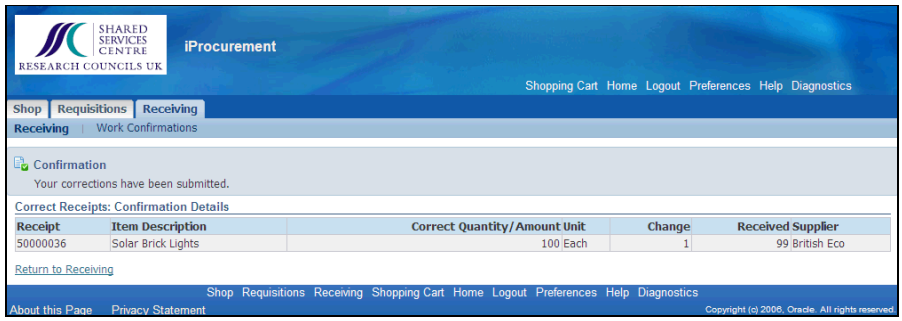
5. Click in the **Correct Quantity/Amount** field.

6. Enter the required information into the **Correct Quantity/Amount** field. Enter a valid value e.g. "**100**".

7. Click the Continue button.



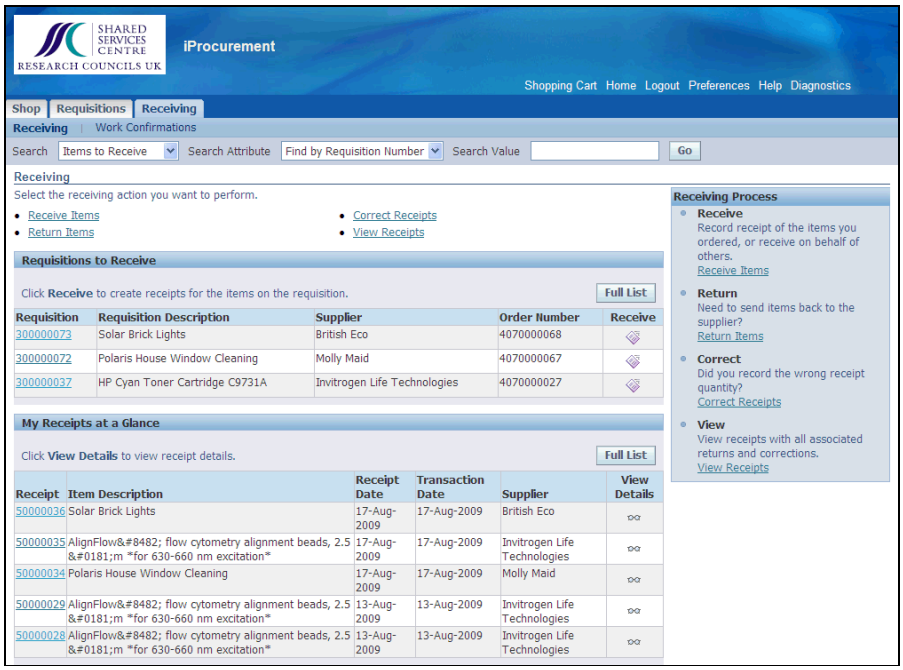
8. Click the Submit button.



You should get a confirmation message similar to the one below:

Confirmation
Your corrections have been submitted.

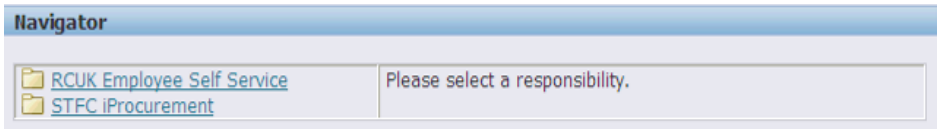
9. Click the **Return to Receiving** link.



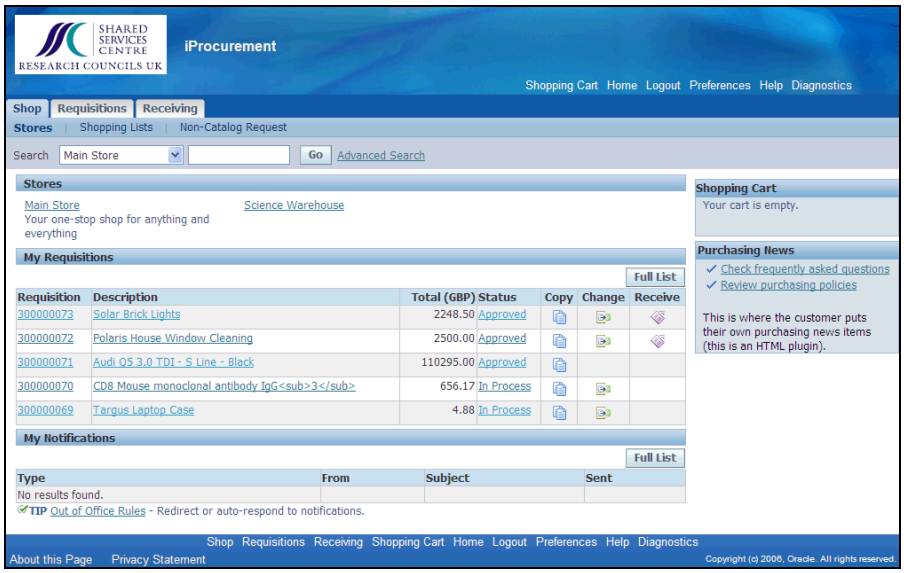
5. Returned Goods

5.1 Return Goods to the Supplier

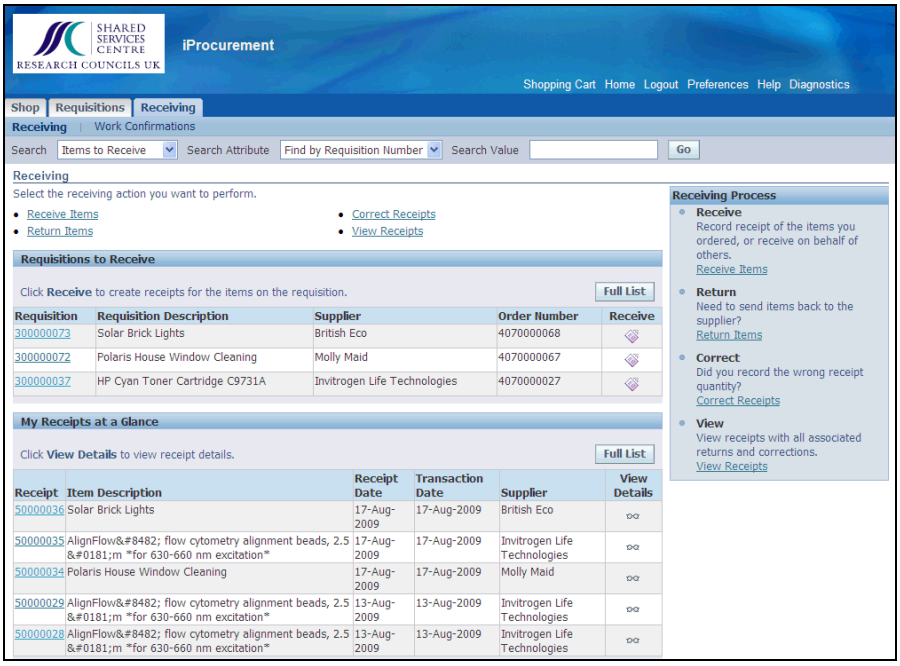
In this example we return 20 damaged solar bricks.



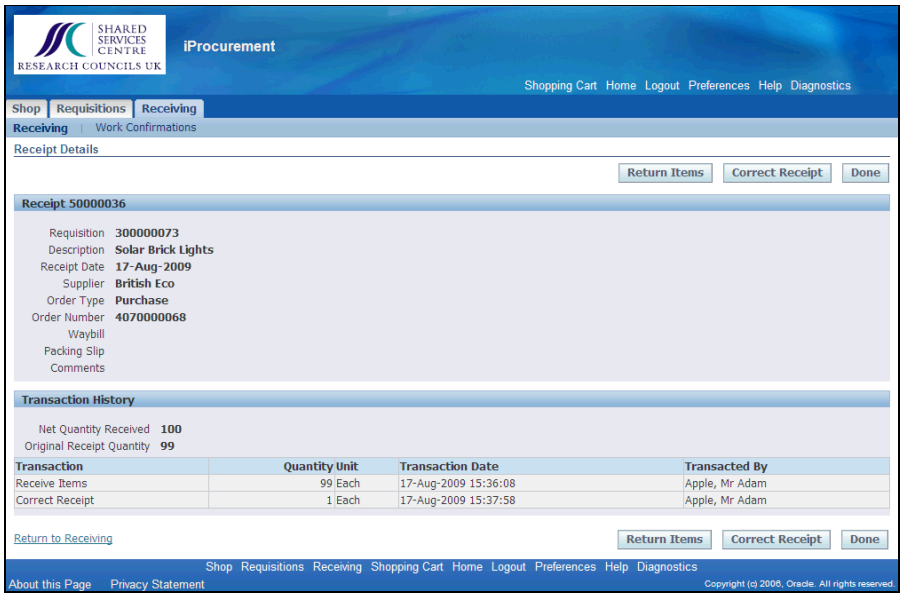
1. Click the **STFC iProcurement** link.



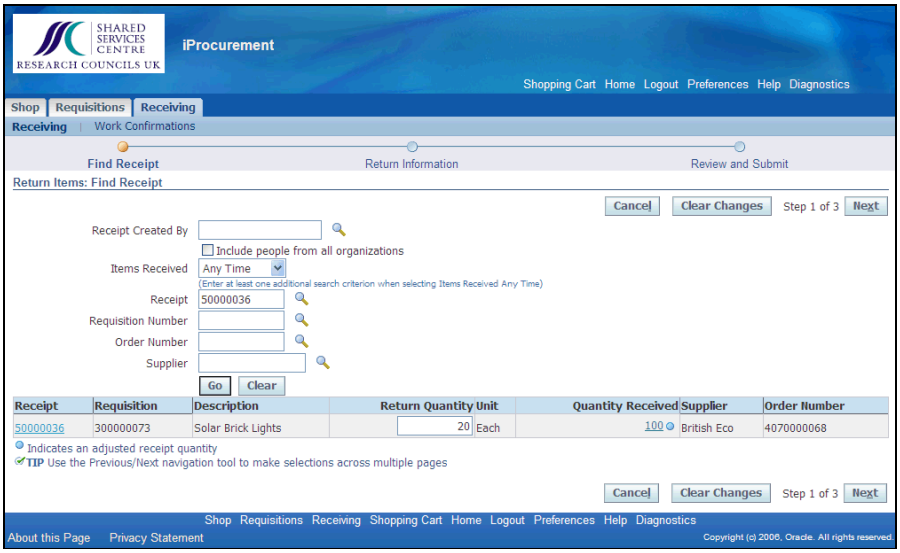
2. Click the **Receiving** tab.



3. Select the appropriate Receipt.
E.g. Click the **50000036** link.



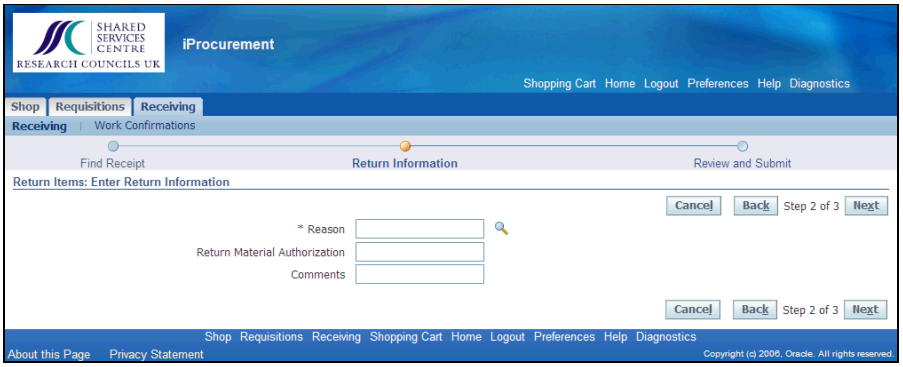
4. Click the button.



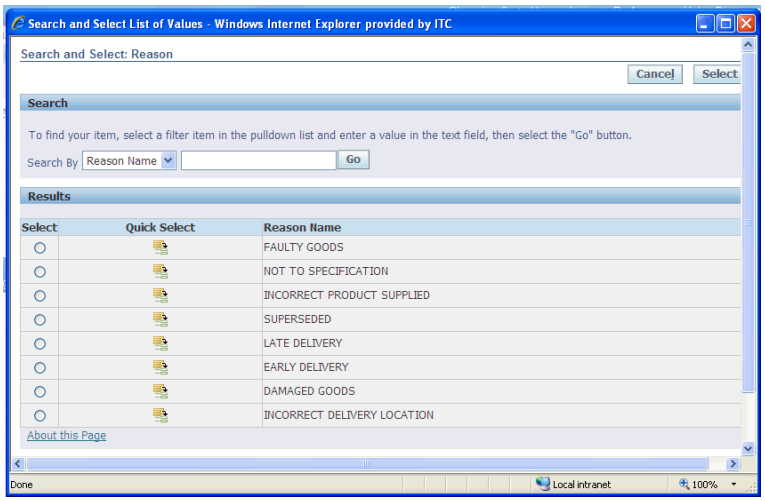
5. Click in the **Return Quantity** field.

6. Enter the required information into the **Return Quantity** field. Enter a valid value e.g. "**20**".

7. Click the Next button.

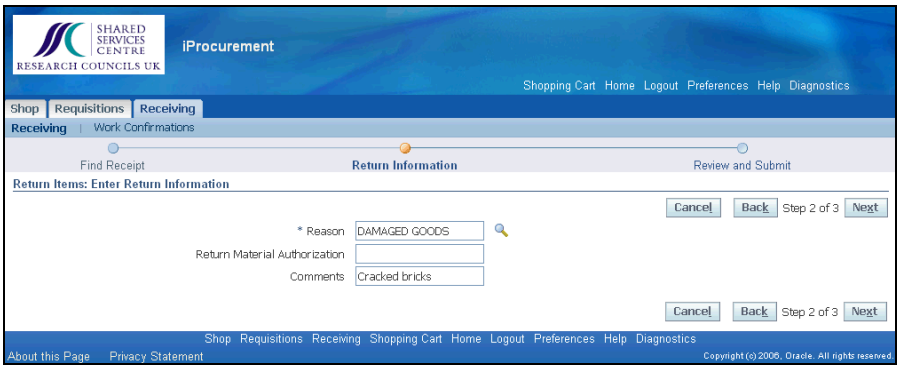


8. Click the **Search for Reason** button.



9. Click the **Go** button.

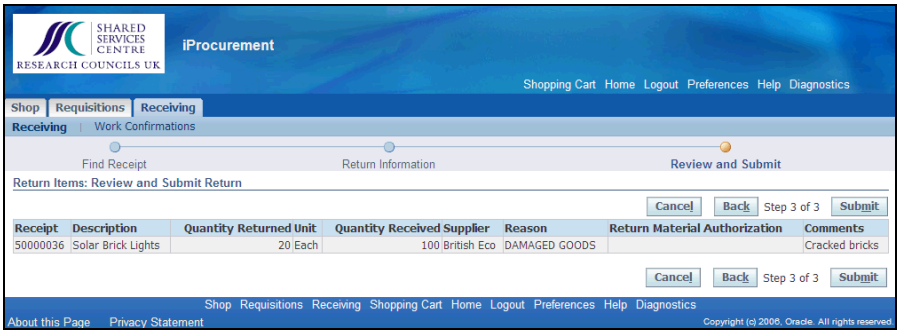
10. Click the **Quick Select** button to select the appropriate value. E.g. **Damaged Goods**.



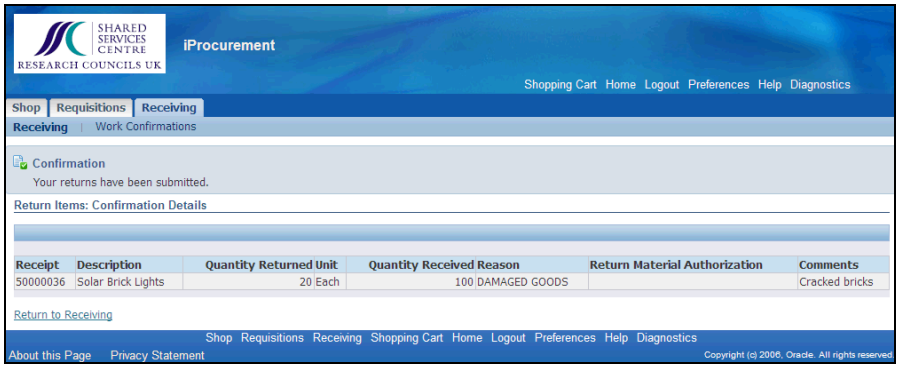
11. Click in the **Comments** field.

12. Enter the required information into the **Comments** field. Enter a valid value e.g. "**Cracked bricks**".

13. Click the **Next** button.



14. Click the Submit button.



You should get a confirmation message similar to the one below:

Confirmation
Your returns have been submitted

If you wish to view your return details you can click on **Return to Receiving** and then select the receipt number from the list. This will show you a complete audit trail of the receipt, returns and any corrections as well as the current net quantity of items received.