

# iProcurement training

iProcurement is the module the University uses for purchasing and receipting goods and/or services. There are two responsibilities for this module.

The main difference is that only iProcurement Buyers can create and work with Purchase Orders.

Departments using iProcurement Requisitioners must also have Buyers who carry out the Autocreate process (manually converting all Requisitioners' approved requisitions into POs).

| iProc responsibility       | Main Activities   | Training Required  |  |                                  |
|----------------------------|---|--|--|----------------------------------|
|                            |   | iProc Part 1:<br>Getting started in iProcurement<br><i>Online or classroom</i> | iProc Part 2:<br>Month End processes<br><i>Online or classroom</i> | iProc Approvers<br><i>Online</i> |
| iProcurement Requisitioner | <ul style="list-style-type: none"> <li>• Raise requisitions for goods/services</li> <li>• Approve the requisition (if within approval limit)</li> <li>• Approve other colleagues' requisitions, as long as it is within their approval limit</li> <li>• Receipt, correct receipts and return items/services whether ordered by yourself or a colleague in the department</li> <li>• Amend requisitions</li> <li>• Query requisitions</li> </ul> | Mandatory  | n/a  | n/a                              |
| iProcurement Buyer         | As above <b>plus</b> : <ul style="list-style-type: none"> <li>• Create own and other colleagues' requisitions into purchase orders</li> <li>• Print any relevant purchase orders</li> <li>• Query purchase orders raised in the department</li> <li>• Cancel lines or entire purchase orders</li> <li>• Finally close lines/orders</li> <li>• Run the month-end <i>Open Purchase Order Report</i></li> </ul>                                    | Mandatory  | Highly recommended*  | n/a                              |
|                            | Approvers of requisitions and orders only (Nb. these users will not be given access to the Marketplace)   | n/a  | n/a  | Mandatory                        |

\*Staff wishing to attend this course must complete iProcurement Part 1 before attending iProcurement Part 2.

If your department uses the Inventory module, you will also need *CAPSA PO Buyer* to raise orders for stock items as iProcurement is not yet compatible with our Inventory module.

## Receipting only

In a small number of departments, some staff members only need to be able to receipt/return goods/services. Whilst these processes can be completed in iProc, if the only processes being completed are receipting and returning then there is an U.F.S PO Receiver responsibility. No training is required, however guidance notes will be sent to staff when requesting this responsibility.

## Purchasing approval limits

Each user with either *Requisitioner* or *Buyer* responsibilities needs to be assigned a particular purchasing approval limit as set out below. These limits reflect the gross value of the requisition or order they can approve up to.

|   |         |                       |
|---|---------|-----------------------|
| Zero (must ALWAYS forward for a colleague's approval) | £2,500  | £500,000              |
| £100 (Requisitioner Only)                             | £5,000  | No limits (unlimited) |
| £250  | £10,000 |                       |
| £500  | £50,000 |                       |

There are some variations on the limits. Some departments may still be using 'old limits', or need to purchase radio-active items or animals where additional controls are required. Call the general Helpdesk on 65999 for advice.