eProcurement

myFinance Training Guide

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Section 1: Requisitions

Raise a requisition for catalogue items

Detailed procedure

Important: Please ensure you are using Chrome or Firefox (NOT Internet Explorer) to process orders via the FedUni Online Catalogue.

1. In the Main Menu, navigate to eProcurement > Manage Requisitions.

Hint: Use the Requisition Name field to name your requisition. This will make it easier for you to distinguish between requisitions in the future. For example, you could enter the name of the company you are purchasing from, and/or a brief description of the ordered goods.

Do not enter your name here as you are the only user who can see this information, and a listing of requisitions all with your name as the title will not help you distinguish between them.

2. Enter a name for your requisition into the Requisition Name field.

3. Click the Continue button.

4. Click the Web tab.

5. Click the FedUni Online Catalogue link.
6. The **Marketplace Home** page will be displayed. This page offers multiple ways in which to add products to your order.

7. Use the **Search box** option to search for an item by typing in a product name or product code.

8. Add an item to your order by entering the quantity, then clicking the **Add to basket** button.

   ![Search Screen](image)

   **Hint:** At any time you can click the **Federation University logo** to return to the home page.

9. As items are added to the basket, a popup will appear. You can access your basket from anywhere in the eMarketplace by clicking the **view basket** button.
10. Continue searching for and adding items until you are ready to checkout.

**Best practice:** Carefully check basket details prior to clicking checkout, as once you have returned to myFinance, you will be unable to edit the product details.

11. When you are finished, click the **Checkout** button.

12. You will be returned to the 3. **Review and Submit** page in myFinance to code your requisition.

**Important note regarding delivery addresses:** Every user has a default delivery location attached to their user profile. This can be changed on a per order basis if you wish, however please note that you may only specify ONE delivery address per order.

**To code each line individually:**

(Use this method if you need to code the lines with different Account codes, or different Dept / Project codes)
**Important:** The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an Account + Dept code, or an Account + Project code. Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.

A. Click the Expand Section button next to the item description.

B. The Account code is located on the Chartfields 1 tab. Enter the appropriate account code for your purchase into the Account field. (The Account code field will have defaulted based on the UNSPSC code attached to the product - you must check this code, and override it if required). **Hint:** When searching for an Account code, enter the number 5 then click the Lookup button. This will narrow down the results to expenditure codes only.

C. To access the Dept code and/or Project code fields, click on the corresponding Chartfields tab:
   a. Chartfields2 for the Dept code:

   b. Chartfields3 for the Project code:

D. Enter your Dept or Project code. Remember that either a Dept or a Project code is used – they cannot be used together.

E. **Continue to Step 12 on page 9**

**To code every line with the same Account + Dept, or Account + Project codes:**
Important: The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an Account + Dept code, or an Account + Project code. Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.

A. Click the Select All / Deselect All checkbox to select all lines.

![Select All / Deselect All]

Modify Line / Shipping / Accounting

B. Click the Modify Line / Shipping / Accounting button to add the same accounting details to every line.

![Modify Line / Shipping / Accounting]

 Hint: Account, Dept and/or Project fields are the only fields required to be completed on this page. All other fields will default from the requisition.

PLEASE DO NOT COMPLETE ANY OTHER FIELDS ON THIS SCREEN.

C. Click the Apply button. This will apply the Accounting Information you have specified (Account, Dept and/or Project) to every line in the requisition.

D. Click the OK button.
13. Click the **Save & preview approvals** button at the bottom of the page.

**Hint:** *On the Confirmation page, each item will have its own status. This allows the approver to choose to approve all lines, or deny individual lines within the requisition.*

14. Click the **Submit** button to submit the requisition for approval.

**End of procedure.**
Saved Baskets

As the eMarketplace will only show your purchasing history (i.e. requisitions that have been approved and converted to a PO), it will not automatically save any basket history.

Therefore, if you have repeat requisitions, for ease of ordering, it is useful to save these baskets of products for future. Although useful, you should still be aware of market changes and should continue to search the marketplace for alternative or better priced products before defaulting to previously purchased items.

Creating a Saved Basket of Products

1. Add your items to a basket as normal
2. In View Basket, you will find an option to create a saved basket:

   - **Add this basket to a saved basket**
   - **Subtotal 181.60**
   - **Checkout**

3. You will be presented with the option to add this basket to an existing saved basket, or create a new one.
4. Items can also be added to an existing saved basket from within the product detail:

   - **SHORTY DISPOSABLE SEROLOGICAL PIPETTES**
   - **Available quantity:**
   - **Check current stock - enter quantity required below**
   - **No delivery charge**
   - **No delivery charge**

5. You can easily access your Saved Baskets from the home page:
Sharing Baskets

Saved baskets can be shared with other users if required. For example, a team leader may wish for their team to order specific products.

1. To share a basket, navigate to the saved basket by clicking the Saved Baskets button.

2. Click the Share saved basket button.

3. Click on Add New User

4. Type the user’s name to share the basket with that user. You may grant permissions to a user to update the basket, but please note, this will update the basket for ALL users who can see the basket. This is useful for collaborative ordering (below).
Once shared, the user will see this basket in their own **Saved Baskets**.

**Collaborative Ordering**

When procuring items for a specific project, sharing the basket is a useful tool to allow users to add items to one basket, and one user can then check out the entire basket of goods. This can also be used to achieve volume quantity discounts by allowing multiple users to contribute items before the basket is checked out.

As with sharing baskets, follow the same process, but when adding a user, grant them permission to edit the contents. This will then update the contents of the basket for all users who have access to it.

The user who checks out the order will be the user who will progress the requisition through your finance system.

**Favourites**

As with Saved Baskets, **Favourites** can be added for ease of ordering in future. However, you should still search the marketplace for any market changes and better products rather than repeat ordering of the same item.

Favourites can be added from within the product information:
Favourites can then be accessed from the homepage:

End of procedure.
Raise a requisition for stationery items (Winc)

Detailed procedure

**Important:** Please ensure you are using Chrome or Firefox (NOT Internet Explorer) to process orders via the FedUni Online Catalogue.

1. In the **Main Menu**, navigate to **eProcurement > Manage Requisitions**.

**Hint:** Use the **Requisition Name** field to name your requisition. This will make it easier for you to distinguish between requisitions in the future. For example, you could enter the name of the company you are purchasing from, and/or a brief description of the ordered goods.

**Do not to enter your name here** as you are the only user who can see this information, and a listing of requisitions all with your name as the title will not help you distinguish between them.

2. Enter a name for your requisition into the **Requisition Name** field.

3. Click the **Continue** button.

4. Click the **FedUni Online Catalogue** link.

5. Click the **Winc Punchout** button.
6. The Winc website will be displayed. Proceed to search for and add items to your cart by using the Search bar at the top of the page, or by browsing the catalogues in the left-menu.

7. After selecting your items, hover your mouse over the **Shopping Cart** icon, then click **Checkout**.
8. Click **Complete Order**.

9. Click **Return Cart**.
10. You will be returned to the 3. Review and Submit page in myFinance to code your requisition.

**Important note regarding delivery addresses:** Every user has a default delivery location attached to their user profile. This can be changed on a per order basis if you wish, however please note that you may only specify ONE delivery address per order.

**To code each line individually:**

(Use this method if you need to code the lines with different Account codes, or different Dept / Project codes)

**Important:** The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an Account + Dept code, or an Account + Project code. Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.

A. Click the Expand Section button next to the item description.

<table>
<thead>
<tr>
<th>Requisition Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Line</strong></td>
</tr>
<tr>
<td>☐</td>
</tr>
</tbody>
</table>

B. The Account code is located on the Chartfields 1 tab. Enter the appropriate account code for your purchase into the Account field. (The Account code field will have defaulted based on the UNSPSC code attached to the product - you must check this code, and override it if required).
**Hint:** When searching for an Account code, enter the number 5 then click the **Lookup** button. This will narrow down the results to expenditure codes only.

C. To access the **Dept** code and/or **Project** code fields, click on the corresponding **Chartfields** tab:
   a. **Chartfields2** for the **Dept** code:
   
   ![Chartfields2](image)

   b. **Chartfields3** for the **Project** code:
   
   ![Chartfields3](image)

D. Enter your **Dept** or **Project** code. Remember that either a **Dept** or a **Project** code is used – they cannot be used together.

E. **Continue to Step 11 on page 17**…

**To code every line with the same Account + Dept, or Account + Project codes:**

**Important:** The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an **Account + Dept** code, or an **Account + Project** code. **Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.**

E. Click the **Select All / Deselect All** checkbox to select all lines.
F. Click the **Modify Line / Shipping / Accounting** button to add the same accounting details to every line.

**Hint**: Account, Dept and/or Project fields are the only fields required to be completed on this page. All other fields will default from the requisition.

**PLEASE DO NOT COMPLETE ANY OTHER FIELDS ON THIS SCREEN.**

G. Click the **Apply** button. This will apply the Accounting Information you have specified (Account, Dept and/or Project) to every line in the requisition.

H. Click the **OK** button.
11. Click the **Save & preview approvals** button at the bottom of the page.

**Hint:** On the **Confirmation** page, each item will have its own status. This allows the approver to choose to approve all lines, or deny individual lines within the requisition.

12. Click the **Submit** button to submit the requisition for approval.

**End of procedure.**
Raise a free format requisition

Detailed procedure

1. In the Main Menu, navigate to eProcurement > Create Requisition.

**Hint:** Use the Requisition Name field to name your requisition. This will make it easier for you to distinguish between requisitions in the future. For example, you could enter the name of the company you are purchasing from, and/or a brief description of the ordered goods.

   *Do not enter your name here* as you are the only user who can see this information, and a listing of requisitions all with your name as the title will not help you distinguish between them.

2. Enter a name for your requisition into the Requisition Name field.

3. Click the Continue button.
5. Click the Order using Free Format button.
6. Enter the Supplier name you wish to order from in the **Search for supplier** field. Alternatively, you can use the Alphabet listing on the left side of the screen to find the supplier.

7. Select the **Email** delivery option.

8. Click the **2. Add items >** button.
9. Enter an item description. Science Warehouse will automatically generate a list of possible matching catalogue items for you to select. You can select one of these, or you can continue creating your free format order for a non-catalogue item.

10. Enter a dash (-) in the Part number and Pack size fields.

11. Enter the Unit price (exclusive of GST), Quantity, and Unit of measure.
12. To add another item, scroll down and click the **+Add new line** button.

13. Repeat steps 8-10 for any additional items.

14. Click the **Add to basket** button.

15. Click the **Add to basket** button on the popup.

**Best practice:** Carefully check basket details prior to clicking checkout, as once you have returned to myFinance, you will be unable to edit the product details.

5. When you are finished, click the **Checkout** button.
6. You will be returned to the 3. Review and Submit page in myFinance to code your requisition. **Important note regarding delivery addresses:** Every user has a default delivery location attached to their user profile. This can be changed on a per order basis if you wish, however please note that you may only specify ONE delivery address per order.

**To code each line individually:**

(Use this method if you need to code the lines with different Account codes, or different Dept / Project codes)

**Important:** The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an Account + Dept code, or an Account + Project code. Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.

A. Click the **Expand Section** button next to the item description.

B. The Account code is located on the Chartfields 1 tab. Enter the appropriate account code for your purchase into the Account field. (The Account code field will have defaulted based on the supplier you have selected - you must check this code, and override it if required).

**Hint:** When searching for an Account code, enter the number 5 then click the **Lookup** button. This will narrow down the results to expenditure codes only.
C. To access the **Dept** code and/or **Project** code fields, click on the corresponding **Chartfields** tab:

   a. **Chartfields2** for the **Dept** code:

   ![Chartfields2](image1)

   b. **Chartfields3** for the **Project** code:

   ![Chartfields3](image2)

D. Enter your **Dept** or **Project** code. Remember that either a **Dept** or a **Project** code is used – they cannot be used together.

E. **Continue to Step 17 on page 16…**

To code every line with the same **Account + Dept**, or **Account + Project** codes:

**Important:** The Accounting Information fields are mandatory, and you will not be able to complete the requisition without entering either an **Account + Dept** code, or an **Account + Project** code. Please ensure the codes you enter are correct. If you are unsure which code to use, contact the FinanceHUB.

A. Click the **Select All / Deselect All** checkbox to select all lines.
B. Click the **Modify Line / Shipping / Accounting** button to add the same accounting details to every line.

![Modify Line / Shipping / Accounting](image)

**Hint:** Account, Dept and/or Project fields are the only fields required to be completed on this page. All other fields will default from the requisition.

**PLEASE DO NOT COMPLETE ANY OTHER FIELDS ON THIS SCREEN.**

C. Click the **Apply** button. This will apply the Accounting Information you have specified (Account, Dept and/or Project) to every line in the requisition.

D. Click the **OK** button.

7. Click the **Save & preview approvals** button at the bottom of the page.

**Hint:** On the **Confirmation** page, each item will have its own status. This allows the approver to choose to approve all lines, or deny individual lines within the requisition.

8. Click the **Submit** button to submit the requisition for approval.

End of procedure.
Troubleshooting

Q. Can an order include catalogue items as well as free format items?

A. Yes, catalogue items and free format lines can be combined on one order.

Q. What should I do if the Vendor I want to use is not in the system?

A. It is important to note that requisitions cannot be raised to Vendors who are not set up in myFinance. Please contact the Finance HUB prior to engaging any new supplier.

Q. How do I know what Account code to use?

A. The account codes to use when creating a requisition begin with 5***. These are expenditure codes. Please refer to the Non-Salary Expense Cost Listing.

Q. How does the Vendor get the Purchase Order?

A. Requisitions are sourced to Purchase Orders once the requisition has been approved, and are then automatically dispatched to Vendors.

Q. What do I do if the Vendor says they never received their Purchase Order?

A. The first thing you should do is ask the Vendor to check their Junk or Spam folder. If they are unable to locate the order, as them to confirm their email address. Once you have this information, you can log a job via the ServiceNow Portal requesting that the email address be checked, and a copy of the Purchase Order to be re-sent to the Vendor.

Q. What if I need to make a change to the requisition after I've submitted it?

A. Changes cannot be made to requisitions once they have been submitted. The order will need to be cancelled and a new order created.
Make your requisition ‘Amount only’ [also known as a ‘Standing order’]

**Amount Only** orders are typically used for:

- Goods that are ordered / delivered on a regular basis. Examples of this include purchases of food items by the Conference & Catering or Hospitality areas, or newspaper and milk deliveries to all areas of the University.
- Contracts that will be invoiced by the supplier in instalments

**Important: DO NOT USE THIS SYSTEM FOR INDEPENDENT CONTRACTORS**

If you have an enquiry regarding setting up an independent contractor purchase order, please email financehub@federation.edu.au.

Detailed procedure

1. After creating your order, log a job via the ServiceNow Portal requesting that the order be changed to “Amount Only”.
2. The Finance HUB will change the order and dispatch to print.

End of procedure.
Using the ‘Manage Requisitions’ screen

The Manage Requisitions screen allows you to keep track of all the requisitions you create. From this screen you are able to view approvals, check what stage your requisition is at, and look up payment details (date of payment, type of payment, total amount of payment and invoice number).

Detailed procedure

1. In the Menu, click the eProcurement link.
2. Click the Manage Requisitions link.

3. The Search Requisitions group box at the top of the screen allows you to search for a specific Requisition ID, or by Requester, Request Status, Entered By, or even the Purchase Order number (PO ID).

4. To search for a requisition using the ID number, enter the ID number into the Requisition ID field, then click the Search button.

*Hint: The system will default the Date From and Date To fields so that you are only seeing requisitions created in the 7 days prior to today. For example, if you have not created a requisition for two weeks, your requisitions will not immediately be displayed on this page, unless you modify the search criteria.*

*Modify the Date From and Date To fields to increase the number of requisitions displayed on this page, (or delete the dates out completely) before clicking the Search button.*

5. Click the Expand Section button to view the Request Lifespan and line items for a requisition (see example below).
Hint: The Request Lifespan gives you a quick visual indication of what stage the requisition is at in its journey. As the requisition goes through each stage, the corresponding icon becomes available as an active, full-colour link which you can click on for more information.

6. The following functions are available to you:

   A. Clicking the Approvals icon will display the Approval Status (if approved, who approved it and the date and time the approval occurred).

   Important: Following up requisition approvals is the responsibility of the requestor. Please be sure to regularly check the approval status; if you see that a requisition is Pending for more than a day or so, click the Multiple Approvers link to see who it is waiting on and get in touch with them.

To access the ChartFields (the Account, Department and/or Project codes used to code each line) from this page:

- click the Expand section button next to the Line Information heading;
- click the Select All / Deselect All link;
- click the View Line Details button;
- the ChartField combination will be displayed for each line of the requisition.
**Hint:** This is useful if you want to check what codes (Account, Dept and/or Project) were used on each line of the requisition.

B. The **Purchase Orders** icon will become active once the requisition has been approved and the system has created a Purchase Order. The **Purchase Order** details will be displayed (including the system-allocated purchase order number).

C. The **Receiving** link will become active once a partial or full delivery has been receipted in the system. Any **Goods Receipts** you have created will be displayed here (including any that have been cancelled).

D. If the **Invoice** icon is active, this means that the invoice has been entered into the system by Accounts Payable staff in Finance.

E. The **Payment** link will only become active if the payment has been scheduled, or already made. This page will show you the scheduled date for payment, payment amount, invoices being paid, and will list the payment method and reference number (highlighted in red below).
Hint: The Payment Amount (highlighted in green, above) will show the total amount of the payment. This may be more than the amount of your order, because the system automatically selects all invoices from that vendor with a due date that corresponds with that week’s payment run. So if 3 invoices have been paid, the total amount of the 3 invoices combined will show here. The Gross Paid Amount will show only the total of the invoice that relates to this requisition.

End of procedure.
Section 2: Approvals

Insert an Ad-Hoc Approver [for requisitions that exceed $150,000 excl. GST]

The following steps demonstrate how to insert an Ad-hoc Approver to a requisition, when the requisition value exceeds $150,000.

The automatic routing of Approvals only occurs when the value is below $150,000. When the value of the Requisition exceeds $150,000 (exclusive of GST), the system does not automatically forward it on to the appropriate Approver. The Requester needs to manually insert the appropriate Approver by clicking the Save and Preview Approvals button. The Submit button is then clicked once the Ad-Hoc Approver has been inserted.

This document outlines the steps Requesters need to take when creating Requisitions above $150,000 to ensure that their Requisitions are correctly approved. This is especially important at audit time, when staff may be asked to provide evidence that all purchase/s have adhered to the University's Procurement requirements.

Refer to the University Procurement – Purchasing Governance Policy & Procedure and the Delegations - Contract, Financials, Staffing and Tender Policy (FN1449) to ensure you are aware of your responsibilities.

Further assistance regarding Ad-Hoc Approvers can be sought by logging a Training Request via the Service Now portal.

Detailed procedure

1. Create a new requisition, and add all the goods / services required.
2. Complete the Review and Submit page.

**Important:** The Ad-Hoc Approval must be added BEFORE you submit the requisition.

3. Click the Save & Preview Approvals button.

**Important:** Do NOT click Save & Submit.

4. Click the Insert Approver button (see example below).
Important: Do NOT use the Start New Path link.

5. The Insert Additional Approver box will open on the screen.
6. Use the Lookup Button to view the list of Adhoc Approver User IDs.

7. Refer to Delegations - Contract, Financials, Staffing and Tender Policy (FN1449) and review Delegation Register Table to determine the appropriate approver for your purchase.
8. After confirming the appropriate Approver identified in the Policy, select their name from the list.
9. Click **Insert**.

10. A new box will appear with that person’s name. This will also have a status of **Not Routed**.
11. Click Submit.

**Important!** The requisition will be routed firstly to the initial approver and will have a status of **Pending**. When they have approved it, it will change to **Approved**, and then it will re-route to the ad-hoc approver (their box will then have a status of **Pending** until they approve it).

Note that the system will not create a PO until ALL approvers have approved it.
End of procedure.
Approve a requisition

When a requisition is submitted for approval, the system determines the appropriate approver based on:

A. the dollar value of the requisition
B. the Department or Project code used

An email is then sent to all the appropriate approvers, requesting that they log into myFinance and approve the requisition. (Only one approver is required to approve the requisition. Once it has been approved, it will no longer be available for another approver to access.)

Detailed procedure

1. Click the Approval Page link in the email.

2. If you are not currently logged into myFinance, the system will redirect you to the Login Page. Enter your User ID and Password, and click the Sign In button.

3. The system will take you directly to the Requisition Approval page.
4. The approver is required to check the order details prior to approving the requisition. To do this:
   
   A. Click the View Line Details button to view the ChartField Distribution (the Account, Department and/or Project codes) entered by the requester.
   
   B. Click the Comments Expand Section button to view any comments the requester has entered.

**Hint:** The Edit Requisition button will return you to the Review & Submit page of the requisition, and allows you to edit any of the requisition details.

**Best Practice:** If you believe any requisition details are incorrect (e.g. price or ChartField distribution), best practice is to Deny the requisition. To do this, use the Enter Approver Comments field to provide an explanation, or instructions for amendment, then click the Deny button. The requester will be notified, and will be able to view your comments. They will then have the option to cancel the requisition, or make any necessary changes (edit) and re-submit it.

**Important:** If the requisition amount is above your delegation you must include an Ad-Hoc Approver. Refer to the instructions on page 39 on how to do this.
5. After checking the requisition details, click the **Approve** button. The **Line Status** will change to **Approved**, and the system will record the name of the approver, their approval level, and the time and date the approval occurred (see example below).

![Requisition Approval Image]

6. Once approved, the requisition will be dispatched automatically in the next batch job (batch jobs run twice daily, currently at 3pm and 6pm).

   **Hint:** If you have multiple requisitions to approve, use the **Previous in List** and **Next in List** links at the bottom of the page to navigate directly to the **Approval** page for each requisition.

7. Click the **Home** link.

8. The requester will receive a notification email confirming that the requisition has been approved, and the **Requisition Status** on the **Manage Requisitions** page will have now changed to **Approved**.
The following requisition has been "Approved".

Requester: CGLEO
Business Unit: University of Ballarat
Requisition ID: 0000000001
Requisition Name: 0000000001
Date: 2008-11-05

You can navigate directly to the approval page for more information by clicking the link below.

https://it59m.ballarat.edu.au/cps/it59m/EMPLOYEE/PROV_MAIN_MENU.PV_REQ.APPROVAL.GEL?Action=UBUSINESS_UNIT=UB001&REQ_ID=0000000001

**Hint:** The Approve Requisitions page can also be accessed directly from the myFinance Home Page:

---

End of procedure.
Section 3: Goods receipts

Enter a goods receipt

After a Purchase Order is dispatched, the vendor ships the ordered item/service. When the item arrives, a Goods Receipt needs to be created in myFinance to record the goods as ‘received’.

This is an essential part of the payment process as without a goods receipt in the system, Finance will not be able to make payment to the vendor.

Detailed procedure

If the Vendor supplies you with a tax invoice:
1. Carefully check to see that you have received everything you ordered
2. Check that there is no significant price variations between the order and the invoice
3. Write “OK to pay” and scan the document to financehub@federation.edu.au

If the Vendor sends the invoice to the HUB:
1. You will receive an email asking you to confirm that the order is okay to pay.
2. Check that there is no significant price variations between the order and the invoice
3. Confirm that the order is okay to pay (or specify if it is not) via reply email.

Cancelling a goods receipt

If you need to cancel a goods receipt, please log a job via the ServiceNow Portal.

End of procedure.