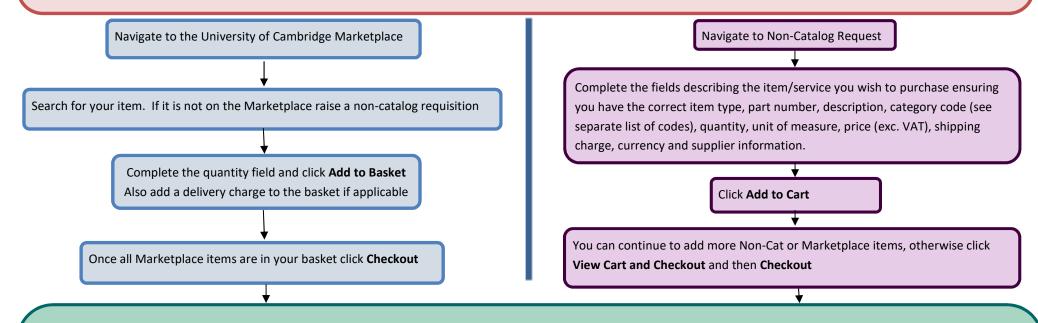# The iProcurement Process

- Purchase Orders must be raised for all items over £100 in value.
- Non-Catalogue orders: written prices are required for items less than £1,000 and three written quotes for items valued £1,000 —£25,000.
- Marketplace orders: for items less than £25,000 only the price from the Marketplace is needed; for items over £25,000 three written quotes are required.
- If three written quotes are required and can't be obtained then an approved dispensation from the competitive bids procedure will be required before an order can be approved.
- Please refer to the Financial Regulations, Schedule 1 if you are purchasing items over the value of £25,000.

Navigate to the University of Cambridge Marketplace

↓

Search for your item. If it is not on the Marketplace raise a non-catalog requisition

↓

Complete the quantity field and click **Add to Basket**
Also add a delivery charge to the basket if applicable

↓

Once all Marketplace items are in your basket click **Checkout**

Navigate to Non-Catalog Request

↓

Complete the fields describing the item/service you wish to purchase ensuring you have the correct item type, part number, description, category code (see separate list of codes), quantity, unit of measure, price (exc. VAT), shipping charge, currency and supplier information.

↓

Click **Add to Cart**

↓

You can continue to add more Non-Cat or Marketplace items, otherwise click **View Cart and Checkout** and then **Checkout**

The **Checkout Requisition Information** screen displays. The information on this screen relates to all items in your basket. The following fields may require completing/amending:

* Requisition Description   * Need-By Date   * Deliver-To Location   * Project codes   * Tax Classification Code

Click **Edit Lines** if any of the fields above vary per line of your requisition. Edit Lines also enables you to split across code and track items as Fixed Assets. During checkout you can also add attachments e.g. your quotes and any notes to the buyer with instructions about despatching your order to the supplier or your dispensation number.

Once all information is entered, click **Return** and click **Next** to forward your requisition for approval **DO NOT CLICK ON SUBMIT!**

Click **Add Approver,** and if applicable you can add a note, attachments, print off the page and review your requisition. The approvers for your department are listed overleaf.
If you want to order online using a non-catalog purchase order number add a 'note to buyer' when checking out to prevent the order being sent by email.

Finally click **Submit**. The Marketplace order will transmit direct, or if it was non-catalog this will be emailed or faxed to the supplier by the approver. All goods should be delivered to *Goods In* who will receipt them on CUFS. You will receive an email advising you that your items have been receipted. You **must** receipt purchase orders for service orders yourself.

Detailed purchasing information can also be found in the Financial Procedures Manual (FPM) and the Financial Regulations on the Finance Division web page

Understanding the account code Structure

Expenditure against a project is recorded in the Grants module using the following detailed information.

Project	Task	Award	Exp. Type	Org.
SWA?/???	??	RG?????	xxxxxx	SW

Project Code: These are of the format

SWAG/??? … SW_CRI CRUK core grant

SWAH/??? … SW_CRI Other CRUK grants

SWAI/??? … SW_CRI External grants

Where ??? are numbers, which vary depending on the project for your dept.

Task: For SWAG projects select the appropriate task number to reflect CRUK's financial year e.g. Task 21 for expenditure up to 31 March 2021.

For SWAH & SWAI projects—most expenditure will be coded to Task 1 (Direct costs) although occasionally some projects may have other task numbers for specified work/research packages.

Award: This identifies the funding award the expenditure will be costed against and will also start RG and will always default in based on the completion of the previous fields.

Expenditure Type: This is the category heading that the expenditure falls under such as other costs/consumable, other costs/maintenance, other costs/miscellaneous.

Organisation: There are three CRUK organisations; one for each type of grant (as with the project codes). These all start with SW and follow the project codes (see above). Please don't use the obsolete SW_CRUK Cambridge Institute code.

The Research Grant code/s I will use is/are:

Projects in other depts.

Until the relevant project codes are set up for CRUK if you are purchasing items that relate to projects held by either Chemistry or Oncology departments please use the following GL codes:

Oncology: U.SWFD.GAAB.E???.0000   **Chemistry:** U. SWFE.GAAB.E???.0000

Expenditure against General Ledger Codes

GL codes are formed using codes for Cost Centre, Source of Funds, and a Transaction Code derived from the Category Code you choose (see separate listing).

For other codes, please speak to the CRUK CI Finance Office

Purchasing Helpdesk:	(7)65999/(7)65101 UFS_PO@admin.cam.ac.uk
CRUK account code queries	Annie Baxter x69504 / Anna Sullivan x30967 Christie King x69854 / Catherine Austen x30963
Supplier amendments/additions	finance@cruk.cam.ac.uk
Supplier payments/invoices	Clinical School Accounts Office SharedServicesFinance@admin.cam.ac.uk Suppliers to use financemedschl@admin.cam.ac.uk
Deliveries and receipting	Goods In (7)69700 Helpdesk-PS@cruk.cam.ac.uk
CUFS Password problems	http://ufs.admin.cam.ac.uk/help/password.cgi
CRI computer/printer set up & remote access	IT Helpdesk (7)69600 ithelpdesk@cruk.cam.ac.uk
Funds Checking / Grant violations	Grants Mailbox grants@cruk.cam.ac.uk

Approvers

Up to £10,000	**Toby Moffatt**
Over £10,000 - no limits	**Chris Lehane via Your Finance Contact as above**
Radioactive orders	**Kesh Munbauhal via Your Finance Contact as above**