The iProcurement Process

- Purchase Orders must be raised for all items over £100 in value
- For Non-Catalogue orders: written prices are required for items less than £1,000 and three written quotes for items valued £1,000 —£25,000
- For Marketplace orders: for items less than £25,000 only the price from the Marketplace is needed; for items over £25,000 three written quotes required.
- 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

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, description, category code, quantity, unit of measure, price (exc. VAT), 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:

* Description
* Need-By Date
* Deliver-To Location
* Project codes
* Tax information

Click Edit Lines if any of the fields above vary per line of your requisition. Edit Lines also enables you to split across codes, track items as Fixed Assets and add attachments.

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 of the page and review your requisition. The approvers for your department are listed overleaf.

Finally click Submit. The Marketplace order will transmit direct, or if it was a Non-Catalog this will be printed on the approvers printer and it will need to be faxed to the supplier. 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.

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.

<table>
<thead>
<tr>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Exp. Type</th>
<th>Org.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SWAG/xxx</td>
<td>14</td>
<td>RG???</td>
<td>Travel</td>
<td>SW</td>
</tr>
</tbody>
</table>

**Project Code:** These are of the format
- SWAG/xxx ..... CRUK’s core grant
- SWAH/xxx ..... Any other CRUK grants
- SWAI/xxxx ..... External research grants

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

**Task:** For SWAG and SWAH projects select the appropriate task number to reflect CRUK’s financial year e.g. Task 14 for expenditure up to 31 March 2014.

For SWAI projects—most expenditure will be coded to Task 1 (Direct costs) although occasionally some projects may have other tasks (Tasks 2-11) 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 Travel, Equipment, Staff

**Organisation:** There are three CRUK organisations; one for each type of grant (as with the project codes). These all start with SW.

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**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 specific donations.** GL codes to use for expenditure in relation to the following donations

- U.SW.SWCA HCHU.E????.0000  Brindle discretionary Fund
- U.SW.SWCB HCHU.E????.0000  Griffiths discretionary Fund
- U.SW.SWCC HCHT .E????.0000  Caldas MetaBric Fund

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

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**Approvers**

| £5,000       | Karen Martin          |
| £10,000      | Emma Ryley and Paulina Annison |
| £no limits   | Ruth Bennett, Katy Smith and John Wells |
| Radioactive orders | Ruth Bennett |
| BRU orders up to £5000 | Ruth Bennett (will confirm with Allen Hazlehurst) |

**Purchasing Helpdesk:** UFS_PO@Admin.cam.ac.uk  
(7)65101

**CRUK account code queries & supplier amendments/additions** 
Ruth Bennett (7)69504 or Paulina Annison

**Supplier payments/invoices** 
Clinical School Accounts Office  
Tricia Speed (7)60708

**Deliveries and receipting** 
Goods in

**CUFS Password problems** 
http://ufs.admin.cam.ac.uk/help/password.cgi

**CRI computer/printer set up & remote access** 
Nigel Berryman (7)69775

**Funds Checking / grant violations** 
Ruth Bennett or Emma Ryley