Getting Started in iPprocurement for Buyers
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Introduction to iProcurement

What is iProcurement?

It is on-line purchasing accessed via Cambridge University Finance System or (C)UFS.

The iProcurement module

This module enables you to raise requisitions (requests for items) via:

- **Marketplace**: Users can search for an item across a variety of suppliers. Once the requisition is approved and created into a purchase order it will be transmitted direct to the supplier.

- **Non-catalog**: If a supplier is not on the Marketplace you can still raise a requisition as iProcurement links to our existing supplier database. Once approved and created into a purchase order it will be printed and faxed through to the supplier.

CARE … If your supplier is not listed in any of the above methods please refer to the guidelines on ‘Adding a New Supplier’ which can be accessed via http://ufs.admin.cam.ac.uk/ssr/

Responsibilities and approval limits

A lot of what you can do depends on your responsibility and buying limit.

**U.F.S XX iProcurement Buyer**: in this responsibility the ‘XX’ represents your 2 digit UFS department code. This enables you to create a requisition and turn it into a Purchase Order (depending on your approval limit). You can also create other colleagues’ requisitions into orders as well as receipt, return and query orders.

**Approval limits**: for buyers these are £0, £100, £250, £500, £2500, £5000, £10000, £50000 and no limit. Your limit will be decided by your key contact. The system will automatically approve your requisition if it falls within your approval limit (this is the total cost including VAT). If it is outside of your limit you will have to forward it onto a colleague with the correct approval limit. A Buyer £0 can **produce** purchase orders but they would be **Incomplete** i.e. not approved and will need to be dealt with by a Buyer with an appropriate limit.

Help required on iProcurement?

Please contact the iProcurement help desk:

- 01223 (7)65101
- UFS_PO@admin.cam.ac.uk
Getting Started in iProcurement for Buyers

Procurement overview

The flowchart below guides you through the procurement process to assist you in completing the relevant fields.

Click on University of Cambridge Marketplace

Search for your item whether by description, product No, manufacturers No, chemical No. Is the item on the Marketplace?

Once you have found your item complete the Quantity field and click on the Shopping Basket Icon

You can re-search for another item to add to your basket. Once all items are in your shopping basket click Check out

Click Checkout again

Check out: Requisition Information
The following fields may require completing/amending:
- Need by Date
- Deliver-To Location
- Project information
- Tax Information
- Charge Account

To make the following changes click on Edit Lines
- Split between codes
- Add attachments
- Track items as assets

Once changes have been made click Return to go back to the Checkout: Requisition Information screen

Yes, click Submit. If you are a buyer the system will generate the Purchase Orders. If it is Marketplace, the order transmits directly. If Non-Catalog, the order will print and needs to be faxed. If you are requisitioner, a buyer in your department will create the purchase orders.

Is Requisition within your limit?

Yes

No, click Next and complete the following fields:
- Add one or more approvers
- Add Note to Buyer if applicable
- Add Attachments if applicable
- Print off the page if applicable
- Review requisition
- Click Submit
- The approver will receive the requisition and action it accordingly.
- Once approved, it will create into purchase order(s) and be sent to the supplier.
**Logging into iProcurement**

The link below will take you to the UFS home page.

[http://ufs.admin.cam.ac.uk/](http://ufs.admin.cam.ac.uk/)

From here you can access:

- the **LIVE** system once you have a username and password which must be requested by your Key Contact.
- the **PLAY** system – access can only be granted by Finance Training.
- reference documents.
- phone numbers for assistance.
- training manuals.

Once you have logged into UFS, the E-Business Suite/Oracle home page will display, and if you click on the relevant responsibility, a screen similar to below will display. You may have more than one module responsibility in UFS in which your case your screen will look slightly different.

Two tasks will appear:

- **iProcurement Home Page** will take you through to the iProcurement homepage where you can order your goods and services.
- **Personal Profiles** is where you can add and amend default settings and your contact details.

As a Buyer you also have access to the **Buyers Works Centre** which is discussed in more detail later in this manual.
Essential set up: personal profiles

Personal Profiles is a one-off set up that must be completed the first time you use iProc. It enables you to set up your printer and copies to allow automatic printing, phone numbers, contact email address and favourite cost centre code.

Step 1: Setting up your printer with UFS

a) From the E-Business suite home, click on the iProcurement Buyer responsibility.

b) Click on Personal Profiles and a blank profile page will display.

c) To put the screen into query mode and search for the field you need to check, you have two options:
   I. Press F11 on your keyboard to put the screen in query mode
   II. Click View > Query by Example > Enter.

d) The first line of the screen will go blue, which indicates it is in query mode.

e) Type in %PRINTER%, to search for the printer settings.

The % acts as a wildcard and assists with your search. By starting and finishing with the % the system will look for the word PRINTER that appears anywhere in the Profile Name field.
f) To run the query, again you have two options; either press Ctrl F11 or navigate to View > Query by Example >Run.

g) The screen now displays the printer you use when printing from UFS. If this is correct then you simply leave it and proceed to Step 2.

h) Click in the User Value field and the list of values button (three dots) will appear. Click on this.

i) To search for the printers in your department click in the find field and type in your department code before the % (e.g ZZ%) and click on Find.

j) Scroll down and highlight the printer you wish to use and click OK. The new printer code will appear in the User Value field.

k) Save your work by clicking on the yellow disk icon.

**Step 2: Setting up number of copies for printing**

The next step is to ensure the system has defaulted in the correct number of copies to be printed for your purchase orders.

a) Put the screen back into query mode (refer to step 1c).

b) This time type in %CONCURRENT% and run the query again (refer to step 1f).
c) Scroll down the list and find the **Concurrent:Report Copies** row. Click in the **User Value** field and input the number 1. This means that every time a Non-Catalog order has been approved the system will automatically print off 1 copy for you to then fax to the supplier.

d) **Save** your work.

---

**Step 3: Setting your contact details and default GL coding**

It is important to include some contact details on a purchase order so that suppliers can contact someone in the event of a query. The contact details that appear on the purchase order are determined by preferences set by the Buyer who approves that purchase order, whether via self-approval or on behalf of someone else.

a) Search using the keyword ‘%CAPSA%’. Then input your **email address** (character limit of 30), **fax number** (if you have one - character limit of 20) and **telephone number** (character limit of 20) in the associated fields.

b) Find the **CAPSA GL Cost Centre Default** profile and enter your four-letter cost centre into the corresponding User Value field.

c) You can repeat this process for the **CAPSA GL Source of Funds Default** value too if you wish.

**Do not change** the **CAPSA GL Entity Default** or **CAPSA GL Department Default**

---

**Step 4: Choose whose details appear on Purchase Orders (Buyers Only)**

a) In the %CAPSA% details of the Personal Profiles section (as in Step 3), click in the **User Value field** for CAPSA PO Queries and the list of values icon will appear (three dots). Click on the icon.
b) A window will appear allowing you to select either Buyer or Requisitioner.

- **BUYER** Your contact details will show on any purchase orders that you approve. If you have not entered your contact details in your personal profile then the purchase order will just show your name with no other contact details.
- **REQUISITIONER** The contact details of the requisition creator will pull through (be that you, another Buyer or Requisitioner). If that person has not entered any contact details then the purchase order will just show their name but no other details.

![Image of a window with options for Buyer and Requisitioner]

   c) **Click OK** to confirm and then **Save** the changes.
Once you have selected the relevant iProcurement responsibility, click on iProcurement Home Page and the iProcurement shop screen will display.

<table>
<thead>
<tr>
<th>Button/Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>This takes you to the E-Business Suite home page</td>
</tr>
<tr>
<td>Logout</td>
<td>Logs you out of UFS</td>
</tr>
<tr>
<td>Preferences</td>
<td>Set up default purchasing information specific to you.</td>
</tr>
<tr>
<td>Shop tab</td>
<td>Always displays the main iProcurement home page.</td>
</tr>
<tr>
<td>Requisitions tab</td>
<td>This enables you to view your requisitions, receipts, invoices and payments.</td>
</tr>
<tr>
<td>Receiving tab</td>
<td>Receipt, correct receipts and return on UFS. Not all users will have this tab, it depends on who receipts in the department.</td>
</tr>
<tr>
<td>Shopping Lists</td>
<td>Add favourite Non-Catalog items to your list to save time searching for them.</td>
</tr>
<tr>
<td>Non-catalog Request</td>
<td>This is where you go to order items from suppliers that are not on the Marketplace.</td>
</tr>
<tr>
<td>University of Cambridge</td>
<td>This is the link to the Marketplace for ordering.</td>
</tr>
<tr>
<td>Marketplace</td>
<td></td>
</tr>
<tr>
<td>-------------</td>
<td>---</td>
</tr>
<tr>
<td>Suppliers link</td>
<td>This will display a list of Marketplace suppliers as well as access to the University Supplier database.</td>
</tr>
<tr>
<td>My Requisitions</td>
<td>Lists the last five requisitions you have created, description amount and status. You also have links through to copy, change and receive. Click on More to view more than five. To look at one in more detail click on the relevant requisition number.</td>
</tr>
<tr>
<td>My Notifications</td>
<td>Will display requisitions where the approver requires more information and a summary of the requisition you have raised. Click on View Full List for all requisitions or Requisitions Tab. Set up out of office rules in iProc.</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>This displays what items are currently in your shopping cart awaiting checkout.</td>
</tr>
<tr>
<td>Purchasing News</td>
<td>This provides links to Financial Regulations, purchasing policies, and acts as a notice board for displaying purchasing news.</td>
</tr>
</tbody>
</table>
University of Cambridge Marketplace

The University of Cambridge Marketplace enables you to:

- Search the suppliers listed on the Marketplace
- Add items to your basket
- Compare products and prices
- The system will indicate with a Preferred as to whether the item is a preferred item from a preferred supplier
- View detailed product information
- Check availability of stock for some suppliers
- Create saved baskets and favourites (see Appendix D, page 85)

You must always search for your item in the Marketplace first. If your supplier and/or item is not on the Marketplace you can raise a requisition using Non-Catalog Requests (refer to page 34).

Navigating the Marketplace home page

1. From the iProcurement Shop page click on the University of Cambridge Marketplace link or the picture of the bridge. The following screen will display.
<table>
<thead>
<tr>
<th>LINK</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketplace home</td>
<td>At any time you click on this link it displays the main marketplace search screen.</td>
</tr>
<tr>
<td>My Account</td>
<td>This provides links to your orders, where you can search for previous requisitions, view your saved baskets and favourite products.</td>
</tr>
<tr>
<td>i help</td>
<td>If you require help when navigating the Marketplace, click on this icon which is always displayed within the banner at the top of your screen. Please note that the help information is not bespoke to the way the University uses the marketplace. In addition to guides there are some flash demonstrations e.g. Oligos</td>
</tr>
<tr>
<td>Logout</td>
<td>Exits the Marketplace and displays the iProcurement shopping cart page.</td>
</tr>
<tr>
<td>View Basket</td>
<td>Shows items in your basket awaiting check out.</td>
</tr>
<tr>
<td>Checkout</td>
<td>This takes you to the shopping cart screen in UFS ready to checkout your items.</td>
</tr>
<tr>
<td>Search</td>
<td>Enables you to search for an item in a variety of ways e.g. description, product No., manufacturer's No.</td>
</tr>
<tr>
<td></td>
<td>Ways to improve searching will also pop up.</td>
</tr>
<tr>
<td>Supplier Offers</td>
<td>Link through to special offers with the suppliers on the Marketplace.</td>
</tr>
<tr>
<td>Marketplace News</td>
<td>A notice board with up to date information.</td>
</tr>
<tr>
<td>Insight Direct, Dell, Xma Apple and Academia Apple Punch-outs</td>
<td>These links take you straight to the University’s computer based sites for custom built computer equipment</td>
</tr>
<tr>
<td>Heffers</td>
<td>This link takes you straight to the University Heffers website</td>
</tr>
<tr>
<td>Oligos</td>
<td>This link takes you through to the Oligo request screen</td>
</tr>
<tr>
<td>Browse Categories</td>
<td>Enables you to search for an item via Product Category Index e.g. P for pens</td>
</tr>
<tr>
<td>Browse Suppliers</td>
<td>Lists all the suppliers on the marketplace</td>
</tr>
<tr>
<td>Recent Orders</td>
<td>Once your requisition has been approved orders relating to the marketplace can be viewed under Recent Orders. The status field will indicate the progress made with the order by the marketplace supplier as well as the actual purchase order number.</td>
</tr>
<tr>
<td>Saved Baskets</td>
<td>This used to be known as Templates. Lists the baskets you have created and enables you to set permissions for other colleagues. (see page 82 Appendix D: Marketplace favourites and saved baskets)</td>
</tr>
<tr>
<td>Favourite Products</td>
<td>Lists your favourite Marketplace items (see page 84 Favourites)</td>
</tr>
</tbody>
</table>
Finding products on the Marketplace

BEFORE YOU START – circumstances when you need to raise separate requisitions to the same supplier.

1. Marketplace suppliers’ systems are unable to cope with the direct transmitting of Marketplace orders where there is more than one type of VAT e.g. paper at SR20% and a book at NO-UK VAT to the same supplier. Please ensure Marketplace orders to the same supplier do not have mixed VAT items. A separate requisition must be raised.

2. If you are ordering several items from the same Marketplace supplier you can only enter one delivery location code, you cannot have multiple delivery addresses. A separate requisition will need to be raised.

1. Enter your **search criteria** and click on the search icon

2. A screen similar to the next one will display with the items matching your search criteria. Highlighted words are matched to your search criteria.

Depending on the number of items you may have to click on **Next** to view the other suppliers, or amend the number of **Results Per Page**.
Information on delivery charges can be found on page 21.

**Viewing detailed product information**

To view detailed information on the item click on the *product description*. You can then **view available quantity** if provided and there are tabs that provide you with more information. From here you can also add the item to your favourite list or add it to a saved basket (refer to Appendix D: Marketplace favourites and saved baskets).

If you do not wish to filter or compare your search results proceed to page 20 Adding items to your basket.

---

**Please Note:**

Any pricing information should not be disclosed to anyone outside of the University’s employment, to do so would constitute a breach of the University’s confidentiality agreement with the supplier and could potentially lead to further legal action being taken against the University and/or the individual. Any requests for information on this agreement from outside of the University should be immediately referred to Procurement Services.

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**Filtering your search**

Once the list of items is displayed the **Filters** can be used to tailor your search results further, by description, price, category, supplier and/or pack size.

![Category Filter](image)

Click to expand the list and check the categories you require. The screen will then display those items that match your search criteria.

The first few most populated categories are shown. You can type in the search box to locate a Category, or click on *show all...* to view the full list.

---

**Compare products**

Following a search, you can compare the details of up to four items from the search results. Check the compare box for the relevant items and they will be listed at the top of the search results as they are selected.
Click on the Compare button to display the product details. The items you are comparing are displayed.
You can input quantity required, add an item to your shopping basket, view delivery charges for that supplier and see available stock (if provided by supplier).

**Adding items to your basket**

1. Once you have found the items you wish to buy, enter the amount in the **Quantity** field. The price will change to reflect the total cost of your desired quantity (with the original price showing below it).

2. Click on **add to basket**. You can also do this directly from the compare screen.
3. A running total of the number and value of items in your shopping basket is displayed in the header bar, click on **view basket** to view the contents.
From your shopping basket you can:

- Continue shopping
- Checkout your requisition and then add Non-Catalogue items to your cart
- Checkout your requisition and approve/forward for approval
- Amend the quantity
- Empty the basket
- Delete selected items
- Add the contents of the basket to a saved basket (see page 82 Saved Baskets)

Please be aware that the Marketplace timeout is 30 minutes of inactivity.

**Marketplace delivery charges**

The cost for a delivery charge must be taken into account at the Requisitioning stage, especially if it relates to a project as funds are checked at this stage of the purchase.

1. Once you have found your item on the Marketplace, click on ‘**Delivery charges may apply**’ to view applicable the delivery charge.

   *Do not add the delivery charge at this point as you may have other items to purchase from the same supplier that will impact the delivery cost. In addition if you do, the...*
delivery charge is added to your basket, the basket screen displays with delivery charge but no item so you have to search for the item again to add that to basket

2. **Add** the item to your shopping basket.

3. Click on **View Basket**.

4. Once all the item/s are in your basket, click on ‘**Delivery charge may apply. Click for details**’.

5. Click **Add to Basket** for the applicable charge.

6. The item and delivery charge are now in your basket ready to check out.

If a delivery charge is applicable and it hasn’t been added when you click **Checkout** from the Marketplace, the system will prompt you to either ‘**Add to basket**’ the relevant delivery charge or select ‘**No thanks**’.
Checking out

Please ensure you are familiar with the University’s Chart of Accounts and/or the Project structure before attempting to checkout. Refer to Appendix A: Chart of accounts for more information.

Depending on your approval limit you will have one of the following checkout options:

**Within limit:** The requisition will approve, the system will create it into an order and approve it.

**Outside limit:** You will have to forward it to a colleague for approval. Once approved by a buyer the system will create it in to an approved order.

Either way, if the order was to a Marketplace supplier it will transmit directly, if it was a Non-Catalog order it must be emailed or printed then faxed/posted. Regardless of which check out method, you must ensure that:
- the requisition is charged to the correct account or project code(s)
- correct tax codes are used.

In addition to this you can also specify different Need-By dates, location codes, split cost of an item over a variety of codes, add notes and attachments to Non-Cat suppliers as well as track an item if it is a fixed asset.

**Basic checkout**

1. From the shopping cart screen click on **Checkout** to display the **Checkout: Requisition Information** screen.
1. Amend the **Requisition Description** if need-be. It’s purely for your information only.

**Delivery**

2. **Need-By date** will default in with today’s date plus seven days, unless you have set an alternative delay in iProcurement Preferences (see page 38). You can change this date by clicking on the calendar icon.

3. **Requester** will default in with the name of the person raising the requisition. If you are raising on behalf of a colleague you may be able to search and enter their name (but only if they are a UFS user).

4. **Deliver-To Location** will usually default in with your department code unless you have overridden this in iProcurement Preferences (see page 38). If this needs to be changed then enter your department code and press tab. Quick Select the relevant code.

**Billing**

5. Information will vary here depending on any default values you have setup in iProcurement Preferences (see page 38) or Personal Profiles (see page 9).

   a. **Coding to projects**

      i. If you have specified a favourite project in iProcurement Preferences then the information will default in the Project, Task, Award, Expenditure Type, Expenditure Organization fields.

      ii. If you haven’t set up a favourite project, complete the fields either manually entering the information or using the **magnifying glass** icons to search for available values. (Refer to page 74 to understand the project structure).

      iii. Complete **Expenditure Item Date**.
b. **Coding to a department account (charge account field)**

The world Multiple displays if you have more than 1 item in your shopping cart. To view the code click on the word *Multiple* (or the charge account that is listed).

i. If you have set up a default cost centre or source of funds in **Personal Profiles** then these values will be used in the system-generated charge account(s), otherwise the department default values will have been used.

ii. More often than not this will require amending. Refer to page 74 to understand the coding structure. Information to enter will vary between departments.

You can split the cost of an item/service over more than one code. Refer to *Appendix C: Splitting over codes*.

6. **Tax classification code**

The value here relates to all the items in your cart. This will usually default in with SR20.0%. If tax code varies for the items in your cart, refer to *Edit Lines* on page 27. Refer to *Appendix B: Tax classification codes* for guidance on tax codes.

7. Once you have completed this screen, the following table will guide you through the next step.

<table>
<thead>
<tr>
<th>If data is correct for all items in your cart as they:</th>
<th>If data differs for the items in your cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>- are being delivered to the same location</td>
<td>e.g. items are of different tax codes or going to different account codes or you need to add attachments.</td>
</tr>
<tr>
<td>- have the same account code</td>
<td></td>
</tr>
<tr>
<td>- have the same tax code</td>
<td></td>
</tr>
<tr>
<td>- have no attachments</td>
<td></td>
</tr>
<tr>
<td>• if within your limit you can Submit refer to step 8</td>
<td>• Follow steps on <em>Edit Lines</em> (page 27).</td>
</tr>
<tr>
<td>• if outside your limit forward for approval refer to step 9</td>
<td></td>
</tr>
</tbody>
</table>

**Submitting requisition: within your approval limit**

8. Once you have clicked on **Submit**, the requisition will approve and the system will create a purchase order per supplier in your cart. You will receive emails advising you of the relevant purchase order numbers.

   o Orders to **Marketplace suppliers** will be transmitted directly to the suppliers.

   o Orders to **Non-Catalog suppliers** will be printed (as long as the *Personal Profile* set up was completed) these can then be faxed to the supplier. Alternatively, the PDF version of the order can be manually emailed to the supplier.
Please note: If you receive an email advising you that the ‘Requisition no longer exists’, no action is required. This is due to the timing difference between the system generated notification emails advising you that the requisition is approved and the subsequent purchase order/s have been approved. The email can be ignored as it has no impact on the requisition or order.

Forwarding your requisition: outside approval limit

9.1 Click Next to display the Checkout: Approvals and Notes screen.

9.2 Click Manage Approvals and type in the surname of the colleague you wish to send it to in the Approver field (their approval limit must be above yours!), tab and name will default in unless there is more than one individual with that name, in which case Quick Select the relevant name.

9.3 Submit

9.4 If you want to add more than 1 approver, click on Manage Approvals again and repeat step 9.2. You can Add to Location if you wish to change the order of approvers.

9.5 You can add a Note To Buyer and Add Attachment (refer to page 29) for the entire cart.

9.6 To review the requisition before you submit, click Next to display the Checkout: Review and Submit requisition screen. To view line information click on Show.

9.7 Click Submit. The requisition will now be sent to the relevant people in the order you stipulated for approval, they will receive an e-mail notification and it will display in their My Notification screen.
Advanced checkout options – edit lines

Edit Lines allows you to vary the checkout information on a line-by-line basis.

Edit Lines is accessed by clicking on the Edit Lines button from the Checkout: Requisition Information screen. The most common amendments are:

- the Tax code as it varies for the items in the cart
- the account codes as it varies for the items in the cart
- splitting costs over more than one code
- indicating an item is a fixed asset (item costing over £5,000 and remaining within the University for at least one year)
- adding attachments to a line only

Delivery tab

You can amend the:

- **Need-by date**: select a different date from the calendar icon.
- **Requester**: This will default in with your name but you can amend to a colleagues name if they are on UFS.
- **Deliver-to location**: remember you can’t mix Deliver-to locations on a single order to a Marketplace supplier.

Billing tab

This is where you can amend/input a project code and tax code per item line. If the project fields are left blank, then the expense will be coded to departmental accounts.
Coding an item to a project or amending to a different project code

Use either the magnifying glass to search for information or manually enter it in.

- **Project**: Enter your department code and tab and **Quick select** the correct project code.
- **Task**: Click on the magnifying glass, click **Go**, click **Quick select** for the relevant task number.
- **Award**: Enter RG and press **tab**, if there is one award it will default in, otherwise click **Quick select** for the relevant award number.
- **Expenditure type**: Partially type in a keyword e.g. Other% and press **tab** or click on the magnifying glass, click **Go**, click **Quick select** for the relevant expenditure type.
- **Expenditure organization**: Enter your department code and press **tab**, the organisation will default in or **Quick select** if there is a pick list.
- **Expenditure item date**: Use the calendar to select todays date.

Amending tax classification code

Please note:

Marketplace suppliers systems are unable to cope with the direct transmitting of Marketplace orders where there is more than one type of VAT e.g. paper at SR20% and a book at NO-UK VAT to the same supplier. Please ensure Marketplace orders to the same supplier do not have mixed VAT items. A separate requisition must be raised.

- Delete the incorrect tax code, click on the magnifying glass and click **Go**.
- **Quick select** relevant tax code.
Accounts tab
The screen shot below is an example of item line 1 being coded to a project (source of funds starts with an M) and line number 2 being coded to departmental funds.

The department code that defaults in will vary for individuals. If a cost centre or source of funds was set up in Personal Profiles then these will appear in the charge accounts in-place of the departmental default values.

To amend the GL code:
- Click on the existing charge account code string (ensuring you are not selecting one with a source of funds starts with an M).
- Either manually overtype the cost centre and/or source of funds or click on the Magnifying glass icon at the end of that field and search for the correct information. Do not amend the E transaction code that the system has generated.

Track the item as an asset:
If an item you are buying is £5,000 or more and will remain within the University for at least one year, then it will need to be tracked as an asset. Click on the Split icon for the relevant line and enter Y in the Track As Asset field.

Attachments tab
You can add an attachment to the entire cart or to an individual item line. Many departments use them to attach details of quotes or dispensations that they have obtained prior to raising the requisition.

Attachments to suppliers (i.e. Category: To Supplier) can only be used for non-catalog orders. Supplier attachments for Marketplace orders will not be transmitted with the order.
To add an attachment to the entire cart click on **Add Attachments** or if you want to attach to an individual item click on the icon. Either way the following screen will display.

- **Description** summarises what the attachment relates to.
- **Category**, amend accordingly as to who the attachment is for.
- Attach either a file, URL or simply complete the text box. For attachments to non-catalog suppliers, avoid File and URL attachments.
- You can add more than one attachment. Once completed click **Apply**.
  - If attached at item line, a paperclip icon will display in the attachments column and an un-editable line in the cart attachments.
  - If attached at cart level an editable line will display
Once changes have been made either Submit if within your approval limit or follow steps on forwarding for approval on page 26.

**After checkout, what happens...**

...to my requisition once it is approved by a colleague?

Once they have approved your requisition the system will create it into an order, and approve it. You will receive an email notification advising you of the relevant purchase order numbers.

If it was a Marketplace supplier the purchase order will transmit electronically to the supplier, if it was a Non-Catalog requisition it will be printed and either faxed or manually emailed by the approver.

...if the approver is away?

The approver has the option of setting up a rule which automatically forwards a requisition/order to another colleague for approval. If you send an order to a colleague who is away their rule will automatically forward your order to the person they have reassigned their work to.

If after 3 days the requisition/order is not approved an e-mail will automatically be sent to the originator advising it has not yet been approved. If another 2 days pass and the requisition/order is still not approved a further e-mail will be sent to the originator advising of this. If a further 2 days pass a final reminder will be sent to the approver. After seven days the requisition/order will go back to the preparer and appear in their Saved Cart to be re-submitted.

Please note that **foreign currency requisitions** must be approved the same day due to changes in exchange rates. If the requisition has been sent to someone and you do not receive an e-mail notification advising that it has been approved you must follow the instructions on page 45.
...if I need to redirect a requisition to another approver

If a requisition needs to be withdrawn from the approval process to be sent to another approver, then follow instructions on page 45.

..if I need to amend my requisition

Follow steps on page 41, as the status of the requisition is crucial in whether you can amend or not.

...if I want to find out what my purchase order number is?

To view the number once the requisition is created into a purchase order you can either go to My Requisitions or Requisitions tab. If there is no Purchase Order number, your requisition is still awaiting creation into a Purchase Order. You will receive email notifications of your order number.

Funds check failures for requisitions charged to projects

Almost all projects will have an absolute budgetary limit that cannot be exceeded, however this limit may also be explicitly divided across tasks and expenditure item types.

iProcurement checks all requisitions with project information against the project budgets to ensure you do not exceed any of the explicit budgets defined on the project. However, this occurs after you have submitted the requisition and seen the confirmation screen.

At this point, if any of the budgets for your specified projects have been exceeded then your requisition will receive a status of Pre-approved and iProcurement will issue you with two emails, with the following subject lines:

- Unable to reserve Purchase Requisition...
- Failed to reserve funds for Purchase Requisition...

These warning (which will also appear in the My Notifications section of the iProcurement Home page) both contain the same message, which will include a line indicating why the funds check has failed.

E.g. “Line #1 Distribution #1 GMS: Budgetary control fails at the Task level”, indicates that the task selected for line 1 of the requisition does not have sufficient budget to pay for the requisition.
Note: the buttons and controls shown beneath these messages should not be used.

Your local Grants Administrator or local accounts team should be able to review the grant you are trying to use and advise you on why the funds check failure is occurring and what changes you need to make to the accounting information in order to check out the order successfully.

You can then amend the requisition as normal (refer to page 41) and complete checkout again.
Non-catalog items

You can raise non-catalog item lines to an internal department, to a supplier that is not available through the Marketplace or to a supplier that is on the Marketplace but from whom you wish to order a bespoke product.

You will also need to follow this process to include delivery charges for Non-Catalog suppliers.

1. Click Non-catalog request to display the template.

   ![Diagram of the Non-Catalog Request form]

   Remember! Anything with a * is a mandatory field. When searching use the wildcard % at the start and end to assist with your search.

2. Item type defaults in as Goods billed by quantity. Amend if required using the drop down list.
3. Enter the **item description** (this will appear on the purchase order). Ensure detailed information is given here.

4. Click on the **magnifying glass** icon to search for the **Category code by description**. Enter part or all of the **description** and click on **Go**. Select the relevant code for the item. If you know the code you can manually type it in but it must be in upper case.

5. Enter a **quantity**. The word ‘Loading’ may display when you click in this field, even though there is nothing to load as it is a free text field. Ignore it by clicking into the field again and entering the relevant information.

6. EA will default in as the Unit of Measure (UOM). Use the **magnifying glass** to change the UOM field if required.

7. Enter the **unit price** excluding VAT (sterling, foreign or discounted values). If it is a foreign currency the system will convert it using the exchange rate loaded.

8. Currency will default in as GBP. If it’s a foreign currency requisition click on the drop down list and select the correct currency. **Care! Foreign Currency requisitions must be approved the same day.**

9. Enter the **suppliers name** and **tab** or use the **magnifying glass** to find the name and site of the supplier. If there is more than one site, you will have a list to choose from. **Do not select Zmarketplace supplier sites.** If it is an internal department the site address will pull through as ‘MAIN’.

10. Input a **Part Number** or product reference number if you have one.

11. Click **Add to Cart**.

12. To add more Non-Catalog items to the cart repeat the process. Shipping/delivery charges will need to be added on as a separate Non-Catalog line.

13. Once all Non-Catalog items are in your cart click on **View Cart and Checkout**.

If you regularly order the same item from the same supplier then refer to **Appendix E: Non-catalog favorites** on page 86.
Call-off orders

The University’s iProcurement system does not have direct support for advanced order types such as blanket purchase agreements, planned orders and scheduled releases. However, these types of orders can be replicated in-part by creating non-catalog requests with the item type set to “Goods or services billed by amount”.

Note: This will place a commitment against the charge account or grant specified during checkout.

Examples of such orders might include:

- A contract for 12-months of IT support to be invoiced on a monthly basis
  - The purchase order is raised for the whole value of the contract.
  - The supplier would invoice on a monthly basis for 1/12th the value of the contract.
  - The requisitioner would create a receipt once a month for the value of the invoice.

- An order for £1000 worth of diagnostic testing, to be invoiced as each diagnostic test is requested.
  - The purchase order is raised and approved for the whole value of the order.
  - Users will request diagnostic testing on a piecemeal basis (where each diagnostic test costs just a fraction of the whole order value) up to the total value of the original order.
  - The supplier will invoice as tests are provided.
  - Users will receipt in iProcurement as their diagnostic tests are performed.
  - Invoices are paid.

In the first example, an order is raised for a 12-month service contract thus creating a commitment in our accounts however; we have not had to pay for the whole contract in advance.

In the second example, an order is raised and approved to provide a total value of a product or service. Typically this would be used where low-value items or services are frequently requested and the overhead to approve many small orders would be impractical.

Raising the order

When raising these orders change the Item Type to Goods or services billed by amount.
The **Amount** field should then be the total monetary value of the order. The process for adding to cart remains the same.

### Checking out

When checking out, the quantity will be the monetary amount, the price will show as £1 and the amount field will be the total monetary value of that service/item.

![Shopping Cart Table](image)

### Receipting and returning

Refer to page 49 for guidance on receipting against call-off orders.
Setting default values in iProcurement

You can set a number of default values that will affect (and speed up) the checkout process for you. Most of these values are accessed via the iProcurement Preferences screen. However, if you wish to setup a default cost centre or source of funds, this is done via Personal Profiles (refer to page 9).

iProcurement preferences

Preferences enable you to set up and save specific purchasing defaults and are a one off task, though you can change it later. Any field marked with a * is a mandatory field. The information that you set up in Preferences will default in against the requisition when you are checking out.

1. Click on Preferences from the Shop page and the General Preferences screens displays.

2. Click iProcurement preferences to display the screen below.

3. From this screen you can complete a couple of set ups in the Delivery section:

- **Need by days:** Amend to what you would like to default in e.g. 1. If you don’t then 7 days will be the system default.
4. To set up a favourite project code:

   a) **Project**
      
      Type in your department or project code and **tab** to list all your department’s project codes. Click on **Quick select** for the relevant code.

   b) **Task**
      
      Click on the **magnifying glass** for the Task field, click **Go** and **Quick select** the relevant task number.

   c) **Award**
      
      Click on the **magnifying glass** for the Award field, click **Go** and **Quick select** the relevant award number.

   d) **Expenditure type**
      
      Click on the **magnifying glass** for the Expenditure Type field and click **Go** to view all types or enter in a key word followed by the wildcard % to help search. Click **Go** and **Quick select** the relevant expenditure type.

   e) **Expenditure org**
      
      Type in your department code and **tab and Quick select** the relevant Organization.

   f) Click **Apply changes** and all the fields should be completed as per example below. This code will take preference when checking out and you can amend this project code when checking out.
Managing requisitions

There are various ways that you can view and manage your requisitions.

My requisitions

From the shop page under My Requisitions, you can:

- Review basic and detailed requisition line information
- View your 5 most recently raised requisitions
- Change a requisition (Page 44)
- Receive your items (Page 47)
- Copy a requisition (Page 42)

Requisition statuses

A requisition can have any of the following statuses at some point during the procurement process. Some statuses are obvious in what they mean:

- Approved
- Rejected
- Incomplete: requisition has been started and not yet checked out
- Pre-approved: requisition not yet approved or more information is required by the approver

Reviewing requisition information

1. Click on either the requisition description or the number and summary information displays.

2. If there is a purchase order number in the far right column then your requisition has been created into a purchase order, if the number is hyperlinked then the order has been approved.
3. To view more information, click on the Details icon for a line. You can view information on the receipt, invoice and also the payment of the item once it has gone through the pay process.

4. Click Return or Shop.

Requisitions searching tab

Whether you click on this tab or Full List in My Requisitions the following screen will display.

It displays your 10 most recent requisitions, and to view more you would need to click on Next 10.
Searching requisitions

Clicking **Search** provides you with more criteria.

You can search in a number of ways using the fields above. Within the requisitions tab, you can view other information:

- **Notifications**: This lists all notifications that are triggered by the system on a Requisition
- **Approvals**: Lists any requisitions for you to approve and that you have approved.

To copy or not to copy a requisition

You may notice a Copy icon on the iProcurement Home Page and a button titled ‘Copy to Cart’ on the requisitions tab. Copying does not work for all requisitions and its success depends on how the lines in the original requisition were generated.

### If the requisition you are trying to copy contains .......

<table>
<thead>
<tr>
<th>Marketplace item lines</th>
<th>You cannot copy this requisition, an error message will display advising a new requisition must be raised.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mixture of Marketplace and Non-catalog lines</td>
<td>You can copy the requisition, ensuring you update the price and quantity if applicable.</td>
</tr>
<tr>
<td>Non-catalog item lines</td>
<td></td>
</tr>
</tbody>
</table>

Incomplete requisitions

A requisition will have an incomplete status if it was started and never finished, copied but not used, saved and forgotten or not approved by an approver within 7 days.

It is important that any incomplete requisition is either completed or deleted from the system. This is to ensure that monies aren’t marked against GL or grant codes that could actually be used for another purchase.
It is recommended that if a requisitioner/buyer leaves the department and/or the University then this should be included as part of a leaving procedure. If they have already left then please contact the iProcurement Helpdesk with information on the requisition that needs cancelling.

Deleting incomplete requisitions raised by yourself

1. Once you have found the incomplete requisition click on the requisition number and then click **Delete**. You cannot cancel incomplete requisitions.

2. A warning message will display advising that once it is deleted it cannot be undone. Click **Yes**. The list of your requisitions will then display again and the requisition you have just deleted is no longer listed.

Completing an incomplete requisition raised by yourself

You can use complete where you have a requisition which has not yet been checked out and therefore the status is incomplete.

1. Click on the requisition number.

2. Click **Complete**.
   - If you already have items in your shopping cart a message will display asking if you would like to add them to your existing cart. Click the relevant button.
   - If you don’t have items in your cart they will simply add to your shopping cart.

3. Complete the remaining checking out process.
Amending requisitions

Amendments can only be made to requisitions that have not yet been created into a purchase order, so this must be checked first.

- **Pre-requisite**: Check whether the requisition has not yet been created into a purchase order

  Click on Requisitions tab and find the requisition. If there is no number in the Order field then it has not yet been created into a purchase order and you are fine to make changes.

  If a requisition has been created into a purchase order no changes or cancellations can be made by the requisitioner. The requisitioner must contact the buyer to advise of the amendments to be made and the buyer will amend the order accordingly.

**Requisition not yet approved, Pre-approved status**: If the requisition has not been approved the requisitioner can cancel the entire requisition, a line or make any changes, checkout and resubmit it to an approver.

**Requisition approved, Approved status**: If the requisition has been approved the requisitioner can cancel the entire requisition, a line or make any changes, checkout and submit it if within their approval limit or submit it to an approver.

**Requisition rejected, Rejected status**: If a requisition has been submitted for approval but it is incorrect the approver will reject it with a reason why and the requisitioner will receive an e-mail notification. If a rejected requisition was coded to a grant, funds will still be reserved against the grant. The requisitioner must either resubmit the requisition with the required amendments to the approver, or the requisitioner will need to cancel it.

**Request information, Pre-approved status**: A requisition may appear in My Notifications as the approver requires further information before they proceed with the approval. The requisitioner will receive an e-mail notification as well advising of this.

**Cancelling an entire requisition or line**

1. From the **Requisitions tab, Find** and then **Select** the requisition.

   Remember if there is a number in the order field then you cannot cancel from this screen. Refer to page 61 on cancelling orders.
2. Click **Cancel Requisition**.

   All lines of the requisition will display.

3. You can either:
   a. select a line and click **Continue** to cancel that line only or
   b. click on **Cancel Entire Requisition**.

4. Click **Submit** on the Review and Submit screen.

5. A message will display advising you that the cancellation has been submitted for processing.

6. Click **Return to Requisition Status**. Any lines that you have cancelled will be a nil value and will have the cancelled indicator icon.

7. The line or requisition will no longer be able to be created into a purchase order.

**Withdrawing a requisition to make changes**

1. Find the requisition and click on the **requisition number**.

   Remember if there is a number in the order field then you cannot withdraw the requisition.

2. Click **Change**.

3. The system will advise you that you are withdrawing it from the approval process. Click **Yes**.
4. Items will be back in your shopping cart.

5. You cannot make changes to the quantity or price if the item is from the Marketplace. If you need to change either of these then delete the line, click Shop, go back into the Marketplace, search for the item and add it to your cart again.

6. If it is a Non-Catalog item then you can amend the quantity and price.

7. Click Checkout to complete the process making any relevant changes as you proceed.

8. If the requisition is within your approval limit, click Submit.

9. If the requisition is outside your approval limit, click Next (the name of the approver will default in, amend if you are sending it to another approver) and Submit.

**Amending a rejected requisition**

1. Find the rejected requisition in My Requisitions.

2. Click on the Rejected status to find out why it has been rejected, then click OK.

3. Follow the process on ‘Withdrawing a requisition to make changes’ and make the relevant change to correct the rejection.
Receipting and returning

You must receipt all items/services ordered. The responsibility of the receipting will vary within departments as it maybe the requisitioner, the approver, stores department or another colleague.

Once an item or service is receipted by an individual other than the requisitioner an e-mail notification will be sent to the requestor advising them that their goods/services have been received.

Navigate: iProcurement home page > Receiving tab

1. Click on the Receiving tab. Requisitions to Receive and My Receipts at a Glance will display.

2. If an item was missed from the requisition and added to the purchase order once it had been created e.g. delivery charge, then it will not display alongside the requisition lines to receive. To ensure all lines are receipted, complete the Search Value field with the Order Number and click Go.

3. All lines will display ready for receipting.
4. **Select** the line you are receiving.

5. Update the **Receipt Quantity** field if you are receipting a different quantity to that which you have ordered.

6. The person who requested the item will be displayed on the far right hand side of the screen.

7. Click **Next** to display the following screen.

   If you have a **delivery note number** enter it in the **Packing Slip** field and add any relevant receipt comments.

8. Click **Next**.

9. You may get a warning message at this point. This only relates to items you are receipting on UFS that you have received before your specified Need-By Date. If this message displays click **Yes**.

10. The **Review and Submit** screen will display. To complete the receipt process, click **Submit**.
11. A confirmation message with your receipt number will display.

12. Click Return to Receiving and the item will be listed in My Receipts at a Glance. To view the receipt information you can click on the glasses icon for the relevant line.

**Receipting against call-off orders**

When receipting a call-off order (or any order raised with an Item Type of Goods or services billed by amount) it is important to notice that the receipting screen uses the amount for the Receipt Quantity.

To create a receipt for the product or service you’ve received, adjust Receipt Quantity to the monetary value of the product or service you’ve received, and then complete the receipting process as usual.

**What if I need to correct the receipt?**

1. From the Receiving tab, Receiving Process box, click on Correct Receipts

2. Items will display that have been receipted within the last 7 days from the date the requisition was raised. Amend and search if applicable.

3. Input the Correct Quantity for the relevant line and click Continue.

4. Correct Receipts: Review and Submit screen displays. Click on Submit.

5. Confirmation message displayed confirming the adjustment.

**Returning on UFS**

Please contact the supplier to arrange for the return of the item, a returns authorisation number may be given to you.

1. From the Receiving tab, Receiving Process box, click on Return Items.

2. Items will display that have been receipted within the last 7 days from the date the requisition was raised. Amend and search if applicable.
3. Input the **Return Quantity** for the relevant line and click **Next** and the Return Items: Enter Return Information screen displays.

4. In the **Reason** field click on the **Magnifying glass, Go.**

5. Click **Quick Select** for the relevant reason.

6. Enter the returns authorization code if relevant.

7. Input any comments if applicable and click **Next.**

8. The Review and Submit screen displays, click **Submit.**

9. No returns number is given.
Approving and rejecting requisitions

If you receive an e-mail notification advising you that a requisition is awaiting your approval you must action it as soon as possible, especially if it is a foreign currency requisition. The requisition will be listed in My Notifications.

If you are going to be absent from the office ensure you set a rule in My Notifications, to ensure any requisitions sent to you for approval are automatically forwarded to another colleague. You can action a requisition away from your desk as long as you have remote access (refer to page 53).

An automatic e-mail will be sent to the originator if you have not approved it within 3 days, a further e-mail will be sent 2 days later to the originator to advise the document has still not been approved and a further final reminder two days later if it still has not been approved. The requisition will then be in the saved cart of the person who raised it.

At the bottom of the iProcurement shop screen is My Notifications, which lists any requisitions awaiting your approval.

Actioning requisitions

1. From My Notifications, click on the Requisition awaiting your approval and a screen similar to below will display with limited information, where you will have a number of actions you can carry out.
Edit requisition

Enables those items within the requisition to be displayed in your shopping cart screen with a view to amending them e.g. account code was incorrect, wrong tax code or a need to split over various account codes.

- Click Edit Requisition.
- Approver Shopping Cart will display, click on Approver checkout and make any relevant changes as you check the requisition.
- Once changes have been made click Submit.
- Click Continue to complete your approval response (refer to page 53)

View requisition details

This enables you to view requisition lines in more detail.

- Click on View Requisition Details to display the details screen.
- Click on the Details icon for the first item line. This will show any receipts, invoices and payments made relating to the item line.
- Click Show Additional Information to review the requisition line supplier, account code and any attachments.
- To view the Tax Information click on the link in the Item Information section. Then click Additional Tax Information, click Cancel to display the Lines.
- Click Return to Requisition Line Details.
- Click Return and then Return again to display the purchase requisition screen.
- Complete your approval response.

Open document

This will only appear when there are attachments associated with the requisition.
Approval responses

- **Approve:** Select if requisition is correct. If the requisition was raised by a member of staff with Requisitioner responsibility, once approved the requisition will go into the pool for the department awaiting creation into an order by a buyer. If it was raised within a buyer responsibility, the system will approve it, create it into an order, approve the order and either transmit direct to the Marketplace supplier or it will be printed and faxed to supplier.

- **Approve and forward** Use if you wish another of member to review it even after you have approved it yourself. Ensure that you enter the **Surname** of the colleague in the blank **Forward To field** and tab. Complete the **Note** field if applicable and click **Approve and Forward**.

- **Forward:** Use this is you wish to forward the requisition to another colleague. Ensure you complete the **Forward To** and **Note** fields and then click **Forward**.

- **Reject:** Complete the **Note** field and then click **Reject**. Requestor will receive an e-mail notification and it will display in their My Notifications and in My Requisitions. Funds will still be reserved if expenditure was coded to a grant.

- **Request information** Use this if more information is required prior to approval. Click **Request Information** and complete the **Information Requested** field before clicking **Submit**. Requestor will get an e-mail notification and it will display in their My Notifications and in My Requisitions.

Once you have carried out an action on a requisition, it will no longer be listed in My Notifications and the status will update on the requestors screen.

**Actioning a requisition via remote access**

When you receive the email notification click on the link ‘Please click here to respond’. You will need to login to UFS. Follow the procedures above to approve or reject the requisition.

Some users may experience problems when actioning remotely, their cache will need to be cleared which can usually be accessed via internet options.

**Setting vacation rules**

Set this rule up when you are going to be away from the office so that any requisitions sent to you for actioning will be sent to another colleague to action in your absence.

1. From the iProcurement Home Page, click on **Vacation Rules** and **Create Rule**.

2. Select **Next** on the Vacation Rule: Item Type screen to display the screen below.
3. Complete the following fields:
   - **Start Date**
   - **End Date**
   - **Message**

4. In the blank delegate field enter the **surname of the colleague** and **Tab**.

   Please ensure that the colleague you are delegating to in your absence has an equal or higher approval limit to yours!

5. If there is more than one member of staff with that surname **Quick Select** the relevant one.

6. Click **Apply**.
The Buyers Work Centre: searching

The Buyers Work Centre (BWC) has replaced the Purchase Order Summary Screen. It provides more flexibility when searching (whether orders, requisitions, suppliers), running and printing reports/orders. It is only available in iProcurement Buyer responsibility. You can export data from the search screens into Excel.

Purchase order summary

1. When you navigate to orders, a list of purchase order headers you raised will display, showing summary header information as well as the matched amount to the invoice.

2. If you did not want to search by Headers, you can search by one of the other tab options: Lines, Shipments, Pay Items, Distributions all of which will have different search fields.

If you wish to view all orders to a particular project then this can be done on the Distributions tab and adding an additional search field called Project.
Searching

When using the search facility, the parameters you can use will vary depending on which tab you had clicked on as per step 2 above.

This guide will display screenshots when searching on the Header tab.

1. Click on **Search** at the top right side of the screen.
2. Select whether you wish to show data when all or any conditions are met.
3. Enter the criteria you wish to search or use the drop down lists to select values.
4. Click **Go**.
5. Search results will display accordingly.

**Additional search fields**

The screenshot above shows only 4 fields for searching, but you can add in additional search parameters by clicking on the drop down arrow in the **Add Another** field.

If you wish to search by **Description** then you will need to enter in at least one other search criteria.

% can still be used when searching.

**Viewing detailed order information**

1. To drill down on an order click on the **Order Number**. Once you have done use the tabs to find the information you are looking for.
This tab provides you with the description, category code, quantity, unit of measure, price, amount, and need-by date. The details button will provide you with a view of the line, shipping, and billing information.

**Shipments:**
As per lines but showing the location code of where the order will be delivered to. The details button will provide you with a view of the line, shipping, and billing information.

**Distributions:**
As per lines but with the addition of the account codes inputted for the expense.

**Additional views**
At the top of the window there is an Actions box that enables you to view more related documents.

Simply select the view and click Go.

**Viewing tax information**

1. Once you have found your order and you wish to view the tax code, click on the **Order Number**. This will open the Standard Purchase Order Window.

2. Click on **Update**.

3. Click on the **Actions** field drop down arrow and select **Manage Tax**.

4. Click **Go**.
The tax page of the order will display with the relevant item lines.

To view the tax information you can either click on **Show** for the relevant item line or click on **Additional Tax Information**.
Buyers Work Centre: amending a tax code

You can amend a tax code on an order that has a status of **Approved**, with a closure status of **Open** and **not receipted or matched to an invoice**. Otherwise it will need to be amended at the Accounts Payable stage of processing the invoice.

1. Click on the **order number** that the amendment relates to. This will display the Header screen of the order.
2. Click **Update**.
3. Navigate to **Actions** and amend to **Change Amount**, **Go** and **Save**.

![Image of the Buyers Work Centre interface showing the amendment process]

4. Navigate back to **Actions**, select **Manage Tax** and **Go**.
5. Warning message may display asking you to save your work, if so click **Yes**.

![Image of the Buyers Work Centre interface showing managed tax details]

6. Click **Additional Tax Information**.
7. Amend the code accordingly by deleting the incorrect code and either manually typing in the code e.g. ME and use % to assist searching or use the torch. **Note:** you must press tab after entering a value here.

8. Click **Apply** and the Tax screen will display and the Non-recoverable, Recoverable and Total Tax fields will amend accordingly.

9. Click **Return to Update Standard Purchase Order**.

10. Click **Submit**. The order status will be Approved with a Closure Status of Open.

11. If needed, you can the re-print the order and send it to the supplier. Refer to the separate guidance on Buyers Work Centre: Re-printing Orders. No amendments will submit electronically.
Buyers Work Centre: cancelling orders

While you can make limited changes to purchase orders, these changes are covered in *iProcurement 2: Managing Orders and the Buyers Work Centre*. However, the following notes will show you how to cancel an order line or cancel an entire order.

**Pre-requisites:** You must find the order. If you do not know how to search for an order then refer to page 55.

**Navigate**

Buyers Work Centre > Orders

Cancelling an order line

This process can be carried out as long as the item has not been receipted or matched to an invoice. Contact the supplier, unless they contacted you, to advise that the product is not required and upon confirmation proceed to cancel the line in UFS.

1. Find and make note of the Purchase Order for the line you wish to cancel.
2. Click the Lines tab and in the Add Another list select **Order** and click **Add**.
3. Enter the **PO number** in the **Order** field and click **Go**. The lines of the PO will display.
4. Click the Select radio button for the line you wish to cancel.
5. In the Select Line drop down box select **Cancel** and click **Go**.
6. A cancel line screen will display with a warning message advising that the action cannot be reversed.

7. Complete the Reason and Note to Supplier field.

   If the item was from the Marketplace then the communication Method will default in as XML. However, amendments to Marketplace orders will not transmit directly to the supplier, the order will need to be reprinted and either scanned and emailed or faxed.

   If it was a non-catalog item then the communication method will default in as None. Amend this to Print.

8. Click Apply.

9. The Line screen will display, the amount will be zero with a status of cancelled. Make note of the purchase order number and click on Clear.

10. Click on the Headers tab and enter the order number into the Order field and click Go.

    If the order status is Requires Reapproval continue to step 11, otherwise go to step 13.

11. In the Select Order field ensure it states Update and click Submit. This will display the order on the screen.

12. Click on the Submit button regardless of your limit and this should submit your cancellation and update the status to Approved.
13. Re-print the order and send a copy to the supplier to confirm the cancellation.

If you re-queried the PO by clicking on the number, and then the Lines tab, you will see that the line quantity is zero as well as the amount. If you want to know why it was cancelled you can click on the details icon and if a note was entered at the cancelled stage it would display in the Notes section on the screen.

**Cancelling an order**

You can cancel an order up to the time the item/service has been receipted in UFS. If receipting has taken place then the item/service will need to be returned to enable this process to be followed. Contact the supplier, unless they contacted you, to advise that the product/s is not required and upon confirmation proceed to cancel the line in UFS.

1. Find and **Select** the order you wish to cancel.

2. Amend the **Select Order** drop down list to **Cancel** and click **Submit**.

   A warning message advises that the action cannot be reversed.

3. The **Cancel Standard Purchase Order** screen displays.

4. Complete the **Reason** and **Note to Supplier** field.

5. **Non-Catalog Communication Method** is **None**. Amend to **Print** and it will print from the set-up of the person cancelling the document as long as it was completed in Personal Profiles.
Communication for Marketplace is XML. However, it will not transmit directly and you will need to print and send it to supplier.

6. Ensure the Cancel Requisition remains as Yes.

7. Click Apply. The status will be Cancelled and the closure status will be Closed.

8. Ensure that you send a confirmation of the cancellation to the supplier.

Adding an instruction to an already raised order or indicating it’s a confirmation order

If you need to add an instruction to an already approved Non-Catalog order once it has printed then you can do this via the Buyers Work Centre. This will print out at the top of the order. It is not recommended for Marketplace orders.

1. First find and Select the order you wish to add the instruction to.

2. Navigate to the Select Order field, which should default in with Update and press Submit.

3. The Update Standard Purchase Order screen displays.

4. Complete the Note to Supplier field.

5. Click Save.

6. If relevant you can indicate whether this is a confirmation order by amending the drop down list at the top of the order header.

7. If the status of the purchase order is Requires Re-approval, Reserved, click Submit and the order status will change back to Approved if you have sufficient authority. You can also submit the order for approval via Approval Path button if required, select the Purchasing path and input the surname of the colleague and submit.

8. A revised order should automatically print as long as per your personal profile is set up.
**Buyers Work Centre: re-printing orders**

Re-printing orders is carried out in the Requests section of the Buyers Work Centre. It is carried out as if running a report in the system but with far fewer parameters required.

Navigate **Buyers Work Centre > Requests**

Selecting the name of the request

The screen below is the schedule request screen.

1.1. Click into the *Program Name* field, type *Print* and press tab. You will see a popup.

1.2. Quick Select *Printed Purchase Order Report (UFS) – XML Publisher* and the screen below will display.
1.3. Click the **Parameters** tab.

1.4. Complete accordingly (this screenshot is reprinting by PO number only).

1.5. If you have a printer set up on your account and don’t want a paper copy to print then click the **Print Options** tab and amend copies to zero.

1.6. From here click **Continue**, and the system will take you to the summary screen. As it is just an order you are re-printing then you don’t need to complete the other tabs.

**Review and submitting the request**

1. From the summary screen click **Submit**
2. A message will display advising that the request has been scheduled. Click OK.

3. The Requests screen displays the last 24 hours requests.

4. Click Refresh until the Phase changes to Completed.

5. Click on the icon for the relevant request line in the Output column to display the PDF version of the order.

Emailing the purchase order

Email

The steps for this will vary depending on your browser.

- From the menu toolbar: File, Send, Page by email
- Hover towards the bottom of the document, a pop up screen displays and you can then Save a copy of the document to a local file and then attach it to an email it from there.

To view recent requests that you have run navigate to:

iProcurement Buyer > Buyers Work Centre > Requests > View
Creating a requisition into a purchase order

This process is only relevant to those departments who have staff with iProcurement Requisitioner responsibility and use the Autocreate process.

All approved requisitions will sit in the department’s requisition pool within the BWC awaiting creation into an order by a member of staff with an iProcurement Buyer Responsibility. You can create a single purchase order from a number of requisition lines as long as the item lines are to the same supplier and supplier site.

Selecting Requisitions from the Pool

Responsibility  iProcurement Buyer
Navigate  Buyers Work Centre > Requisitions

1. A screen will display with approved requisitions for autocreation.

2. You can view account code and tax information by drilling down on the Requisition Number. Once you have clicked on the number the requisition line displays and there is a link to the Tax Information in the Item Information section. Once clicked on you can then click on Additional Tax Information.
3. To create requisition lines to the same supplier and supplier site into an order click in the Select box for the relevant lines as per the following screenshot.

4. Once all lines to the same supplier have been selected, click the Add button and the lines will be added to the document builder that displays at the top right side of the screen.

5. Click on Create.

6. You will notice that the Orders tab now displays, with the order number.
7. From the above screen:
   a. Enter a **description** for the order.
   b. If this is a confirmation select **Yes** from the drop down list.
   c. Complete the **Bill-To and Ship-To**
   d. You can add Note to Supplier (please be aware that if it is a marketplace supplier then the message will not transmit but will remain on the order in UFS)
   e. You can click on the other tabs to review the information.
   f. You can save the order as you may have further items to add to it during the day.
   g. **Save**

8. Review:
   a. **Incorrect Tax Codes** can be amended:
      - To check the tax code, click on the drop down list in the **Actions** field and select **Manage Tax, Go**.
      - Click on **Update, Additional Tax Information** and amend the tax code accordingly.
      - Click on **Apply** and then click on **Return to Update Standard Purchase Order**
   b. **Incorrect Account Codes**
      There is no opportunity to correct these at this stage, apart from reject and then return the requisition for it to be amended, or amend the account code when the invoice is processed in AP.
7. If you have a Non-Catalog order that you need to add more lines to e.g. delivery charges, click on Lines tab, Add 5 Rows button and enter the information accordingly

   **Please: do not use the Add 5 Rows button if it is a Marketplace Order as this causes significant issues when the order is being transmitted and impacts the processing of the invoice**

9. If coding to Grants then you can Check Funds from Actions at the top of the page and click Go and the relevant information screen will display, which you act upon accordingly.

10. Final step is to Submit and a confirmation screen will display.
   - Marketplace orders will transmit electronically.
   - Non-Cat orders will print as per Buyers print set up.

**Adding to existing unapproved purchase orders**

If you have an unapproved order, you can add requisition lines to the same supplier throughout the day, therefore submitting only one order.

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>iProcurement Buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigate</td>
<td>Buyers Work Centre &gt; Orders</td>
</tr>
</tbody>
</table>

1. First thing to do is find the Order number you are adding the requisition line to.

2. The order will be listed as Incomplete. Make note of the number and click the Requisitions tab so that the Requisitions for Autocreation screen displays. Remember you can only add requisitions lines for the same supplier to the same order supplier.

3. **Amend** the document builder by clicking on the drop down arrow and selecting Add to Order.

4. **Select** the lines and click Add.

5. The document builder will list the items and the Order Number you are adding to must be entered in the Order field.

6. Click Create.

7. The order will open and to view this you would simply click on the Lines tab and Submit.

**Returning a requisition from the pool to the requisitioner**

If an item line needs to be returned due to incorrect information then even though it is an approved requisition in the pool it can still be done.
However, please **be aware** that if you are returning a requisition then it will return all lines from the requisition not just the one you have selected, unless the other lines have already been created into a purchase order.

1. From the Requisitions for Autocreation screen **select** the requisition you are returning and click **Return**.

2. A message will pop up and your next step is determined by the message!

   ![Warning](image)

   **Warning**
   
   All lines on the selected requisitions will be returned except for those lines that are already placed on a purchase order.

3. If you are happy to proceed then enter a note in the **Reason** field and click **Apply**.

   The requisitioner will receive an email advising of the return. They will click on the **Change** icon for the relevant requisition and whilst it will display all original item lines in the checkout screen there will be an icon that displays on the lines that have already been created into an approver purchase order therefore unable to make any amendments to them.
Further topics

This first course in iProcurement covers the essential topics needed to get working in iProcurement and the Buyers Work Centre. However, there are a number of advanced topics which are covered in the second iProcurement Course (Managing Orders and the Buyers Work Centre).

The second course is aimed at iProcurement Buyers only and would be beneficial for any Buyers with a significant purchasing role. The course covers advanced use of the Buyers Work Centre. This includes:

- iProcurement Reporting

  Advanced use of the Buyers Work Centre:
  - Searching and Personalising in the Buyers Work Centre
  - Changing Tax Codes on Purchase Orders
  - Confirmation orders
  - Handling Incomplete Purchase Orders and requisitions

These topics are also covered in the course manual for iProcurement 2 and the detailed guidance notes available on the documentation web pages on the Finance Division website under Training > Documentation & FAQs > iProcurement
Appendix A: Chart of accounts

When you purchase an item or service, expenditure is allocated to your departments Chart of Account. Some departments have two options, it can either be coded to the department's budget/funds or to a Research Grant/Project.

General Ledger Account Structure

General ledger account codes are made up of six segments, usually written in a string format e.g. **U.XX.XXAA.AAAA.ESBC.0000** (XX being your department code).

- **Organisation** (1 character) **U**
- **Department** (2 characters) **ZZ**
- **Cost Centre** (4 characters) **ZZ??**
- **Source of Funds** (4 characters) **????**
- **Transaction** (4 characters) **E??**
- **Spare** (4 zeros) **0000**

**Organisation Segment:** This is used to split transactions by legal entity. Normally this will be U for departments within the University of Cambridge.

**Department Segment:** This is used to define the Department who is processing the transaction, e.g. AG for the Finance Division.

**Cost Centre Codes:** Cost centres enable departments to organise and group their accounts to reflect their own departmental activities e.g. administration, laboratories, conferences, canteens or specific courses. Expenditure (and income) is allocated to the appropriate cost centre. This enables departments to monitor income and expenditure, in some instances comparing to budget, for their specified cost centres.

The Cost Centre code comprises four characters: the first two replicate the department code and the next two are selected by the department. The department then chooses a suitable description for each cost centre to identify the particular activity it represents.

**Source of Funds Codes:** Funding for the University's activities comes from many different sources. The University has a responsibility to its sponsors, donors, and government funders to separate, manage and report (in most cases) on the activities based upon the source of funds. Source of Funds code is represented by four characters, which are the same across all departments. Refer to Financial Procedures manual chapter 3.

**Transaction Codes:** Transaction Codes are used to describe the type of expenditure or income e.g. a book or room hire charges. Accurate selection of transaction codes is important for reporting and control purposes. The code consists of four characters. The first identifies the broad transaction category, the next three categorise the transaction in more detail. E.g. If you were ordering some box files you would select transaction code ESBC.
E: Expenditure on Consumables account
S: Stationery and Office Supplies
BC: Box Files

Expenditure transactions codes starting with E***

- A Audio-visual and Multimedia
- B Library and Publications
- C Catering Supplies and Services
- D Medical, Surgical and Nursing Supplies and Services
- E Agricultural/Fisheries/Forestry/Horticultural Supplies and Services
- F Furniture, Furnishing & Textiles
- G Cleaning Materials & Equipment, Janitorial supplies
- J Utilities
- K Computer
- L Laboratory & Animal House Supplies and Services
- M Workshop & Maintenance Supplies (Lab and Estates)
- P Printing
- Q Telecommunications, Postal and Mail Room Services
- R Professional & Bought in Services
- S Stationery & Office Supplies
- T Travel & Transport (incl. Vehicle hire and subsistence)
- U Safety & Security
- V Vehicles (Purchase, Lease, Contract Hire)
- W Estates & Buildings

Spare Code: There is a spare field at the end of the coding string in case the University decides to expand the accounting code structure in future. However it still has to be filled in.

Research grants and project structure

A “grant” consists of two main parts;

**The award** - represents the sponsor who is doing the funding.

**The project** - describes the way in which the funds are spent.

In the main, a grant will have a single award and project. However it is worth being aware that one award may fund several projects and in turn one project may be funded by several different awards. The coding structure for Grants and Projects is set out differently to that for the General Ledger codes. The Grants/Projects coding consists of 5 segments: -

Project Code: Linked to an award the project code has the department code in the first four digits. *i.e. XXAG/001* (XX being the department code).
**Task:** Projects are broken down into tasks. Could be described as ‘work parcels’, they aid in managing the project. Every Project will have at least two tasks for direct and indirect costs.

**Award:** This code links the project to the General Ledger. The Award is number issued by Research Services and will start with RG followed by 5 digits. (e.g. RG12345).

**Expenditure type:** This is the category heading that the item falls under, picked from the List of Values. They are broad headings such as Travel, Equipment, Staff, Other Costs etc.

**Organisation:** The department or sub-department code.

A General Ledger account code will be automatically generated from the above information. Never manually type in a GL code for a grant/project.

---

*Transactions that are entered for Research Grants require special Grant code combinations to record the type of specific information for their reporting purposes. However, when the information is transferred into the General Ledger it is then automatically summarised and converted into the string format.*

---

If you are unsure as to the coding information you will need to enter when raising requisitions, then please speak with your departments accounts team. Getting it right is a crucial part of the process otherwise orders get delayed, invoice processing is more complex.
Appendix B: Tax classification codes

You don’t have to be an expert in VAT to use the UFS modules however, it is important that you have an understanding as to the various tax codes and the scenarios in which they would be used.

<table>
<thead>
<tr>
<th>Tax Name</th>
<th>Example of when to use</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR20%</td>
<td>Standard Rate for most everyday items</td>
</tr>
<tr>
<td></td>
<td>• Computer equipment</td>
</tr>
<tr>
<td></td>
<td>• Stationery supplies</td>
</tr>
<tr>
<td></td>
<td>• Clothes</td>
</tr>
<tr>
<td></td>
<td>• Some foods/drinks</td>
</tr>
<tr>
<td>EC20%</td>
<td>Same as SR20% however, use this code if you are buying Standard Rate items outside of the UK.</td>
</tr>
<tr>
<td>Services Tax</td>
<td>This is a 20% tax rate and is used when purchasing services from overseas. However, if the service you are buying is not VATable then use NO-UK VAT.</td>
</tr>
<tr>
<td>NO-UK VAT</td>
<td>This is a 0% VAT name.</td>
</tr>
<tr>
<td></td>
<td>• Hire of rooms</td>
</tr>
<tr>
<td></td>
<td>• Travel tickets</td>
</tr>
<tr>
<td></td>
<td>• Books</td>
</tr>
<tr>
<td>ME0%</td>
<td>Medical exempt for equipment used in medical or veterinary research e.g.</td>
</tr>
<tr>
<td></td>
<td>• Bandages</td>
</tr>
<tr>
<td></td>
<td>• Scalpels</td>
</tr>
<tr>
<td></td>
<td>• Test tubes</td>
</tr>
<tr>
<td>INTERNAL</td>
<td>This 0% code is used when paying internal invoices as no VAT is charged between depts.</td>
</tr>
<tr>
<td>RR5.0%</td>
<td>Reduced rate mainly used by Estate Management.</td>
</tr>
</tbody>
</table>
Appendix C: Splitting over codes

Within iProcurement, it is possible to split the cost of an item or service over:

- two grant codes
- two department codes
- a mix of grant and department codes

**Be aware …. If you set up a favourite Grant code in Preferences**

- If it is one of the codes you wish to use for splitting then leave the default information in the **Billing** section of the **Checkout: Requisition Information** screen.
- If you want to use totally different codes then ensure you delete the Grant information from the **Billing** section of the **Checkout: Requisition Information** screen.

**More than one Grant code**

1. Once the items are in your cart, click **Edit Lines**.

2. Click **Billing** tab and enter one of the project codes in the relevant item line (unless the project code information has defaulted in from preference set up).

3. Click on **Split** to display the Requisition Information: Split Cost Allocation screen.

4. Click **Add Another Row**, which will display a blank row.

5. Complete the fields for the project and amend either the Percent, Quantity or Amount field for each line allocating split of expense accordingly.
6. Once totals equal 100% click on **Apply** to display the Requisition Information: Edit Lines screen. Remember to indicate if the item is a fixed asset by clicking on the **Accounts** tab and the **Split** icon.

**Over more than one department code**

1. If any of the Grant fields on the checkout screen are completed, delete the information.

   This process will not work if any of the **Project**, **Task**, **Award**, **Expenditure Type**, **Expenditure Organisation** and **Expenditure Item Date** are completed.

2. Click **Edit Lines, Accounts** tab.

3. Click on the **Charge Account** code for the relevant item and update the **Accounting Flexfield** with the correct code if it differs from what has defaulted in.

4. Click **Add Another Row** to display line 2 and either the system generated code, or the code set in your Personal Profiles will default in.

5. Update the **Accounting Flexfield** for Line 2 with the correct code.

6. Update either the Percent, Quantity or Amount field accordingly and tab.
7. Once totals equal 100% click on **Apply** to display the Requisition Information: Edit Lines screen. Remember to indicate if the item is a fixed asset by clicking on the **Accounts** tab and the **Split** icon.

8. The charge account for the item line you have split should display as Multiple.

9. Complete remaining process

**Split cost over a GL and grant code**

1. Even though you are partially coding to a grant, please ensure that no data is entered in the following fields:

   - **Project**, **Task**, **Award**, **Expenditure Type**, **Expenditure Organisation** and **Expenditure Item Date**.

2. Click on **Edit Lines, Accounts Tab** and click on the **Split** icon for the relevant item.
3. The **Accounts** tab will display. Amend the GL code string to the code you wish to use as well as either the Percent, Quantity or Amount fields.

4. Click **Add Another Row** and then click **Projects** tab and a screen similar to below will display.

5. Do not input anything in Line 1 on the projects tab as that relates to the GL code that was entered at step 2.

6. Complete Line 2 with the project information and update the Percent field and Tab.

7. Once totals equal 100%, click **Apply** to display the Requisition Information: Split Cost Allocation screen and lines will be coded to GL and project.

8. Click **Apply** and either complete remaining tabs if required or click **Apply** to display the Checkout: Requisition Information screen to complete remaining process.
Appendix D: Marketplace favourites and saved baskets

Saved Baskets

These enable you to create a saved shopping basket of items that you can add to your current shopping basket the next time you require them. Within this function you can set up permissions to allow colleagues access to use your saved basket.

Once your saved basket has been created, you can view it from the University of Cambridge marketplace screen under the My Account menu or by clicking on the Saved Basket tab on the marketplace home page.

Setting up and Adding to a Saved Basket

1. First add the items that you wish to include in a saved basket (i.e. something you order on a regular basis) into the shopping basket.

2. Click on view basket. Prior to checking out click on Add this basket to a saved basket. The contents of the shopping basket can then either be added to an existing saved basket or a new saved basket created.

3. Create a name for the saved basket and click on Create New Saved Basket. The screen below will display with the items that you have added to that basket.
4. In addition you can also search for individual items and add those to a saved basket.

**Sharing your saved basket**

Saved baskets can be shared with other users so they can be used for raising requisitions.

1. Click on the saved basket name, you can access your saved baskets either from the home page or the My Account menu. Click on the button **Share saved basket**.

2. Click on **Add new user**.

3. Enter the surname name of the user.

4. Tick the **User may change basket content** check box to allow the user to edit the basket so they can order the quantity they require as per screen below and add items to it. CARE! Edit allowed also enables an individual to delete the basket even if they did not create it.

5. Click the **Add permission** button.
Favourites

Like saved baskets, favourites allow you to create lists of items you may wish to order on a regular basis. However favourites are personal lists and cannot be shared with other users. These can be accessed from the Marketplace home page, under My Account, Favourite Products.

To add an item to your favourites you must:

1. **Search** for the product.
2. Once found click on the **product description**.
3. Product information will display and under Product options click on **Add to favourite products**.
To remove an item from favourites click on the favourite products link in the Market Place screen, click on the product name and there will be an option to Remove from favourite products.
Appendix E: Non-catalog favorites

You can also add the item to your favorites by clicking on Add to Favorites. This will save you time when requesting that item again.

Once you have completed steps 1-10 of creating a Non-Catalog requisition you can add the item to your favorites by clicking on Add to Favorites. A message will display advising you that the item has been added to your shopping list.

To add a favourite item from your shopping list to your cart:

1. Click on Shopping Lists.

2. List of favorite items will display.

3. Amend the quantity if need-be.
4. Click on Add to Cart for a specific item or click Add All Items To Cart, if applicable.
5. Click View Cart and Checkout
6. The items will then be displayed in your shopping cart.

7. From the shopping cart, you can then amend the price, if it has changed since the last time you ordered that item, quantity and description.