Charging to a Project code

iProc Requisitioner | Oracle Financials

This guide is intended for iProc Requisitioners who have started the process to raise a requisition in the iProcurement (iProc) part of the Oracle Financials system and want to charge the requisition to a Project code from the *Checkout: Requisition Information* screen.

Before looking at how to charge to a Project code it is important to understand why they are used and how they are constructed:

- A Project code is an alternative code for the account number and relates to the research grant or contract that will be used to pay for the items on the requisition.
- Project codes begin with **one letter, R or P followed by six numbers** eg *R010079*.

The requisition process:

Shopping for Items → Shopping Cart → **Checkout: Requisition Information** → Checkout: Approvals and Notes → Checkout: Review and Submit

To charge a requisition to a Project code you will need to:

1. Complete the **first five fields on the right** of the *Checkout: Requisition Information* screen. These are:
    - Project
    - Task
    - Expenditure Type
    - Expenditure Organization
    - Expenditure Item Date

    If you are charging the requisition to more than one Project code, or to a Project and an Activity code, this information is entered on a different screen.

2. **Project** – This code is the research/project budget the cost will be charged to. It will begin with R or P then 6 numbers.

    Enter the **Project** code and then press the **Tab key**. Alternatively, select the **magnifying glass** icon to see more information about the Project and then select the correct Project code using the **Quick Select** icon.

    On the *Project Code Detail* screen ensure the *Project Name* is correct or your requisition may be sent to the wrong Approver and potentially be charged to the incorrect code.

    Project codes often have time restrictions on them, so you will need to ensure that your expenditure falls between the **dates** shown for this project.

3. **Task** – A form of category code. Some Project codes only allow certain Tasks to be used with them, due to spending restrictions placed on the funding.
   Enter the **Task** and then press the **Tab key**, or use the **magnifying glass** icon to search and then select the correct Task using the **Quick Select** icon.
   Entering the wildcard **%** will return all available Tasks for this project.

4. **Expenditure Type** – This is an **IE code** (Income and Expenditure) which is required for reporting purposes. An IE code is a 4-digit code to label what the expenditure is on the requisition. It is usually shown in the *Charge Account*. This is the same as the IE code which is the **second segment** of the *Charge Account*.
   Type the **Expenditure Type** by copying this from the **second segment** of the *Charge Account* and then press the **Tab key**.

5. **Expenditure Organization** – This is always entered as **University of Manchester**. Type ***u*** then press the **Tab key** and *University of Manchester* will appear in the field.

6. **Expenditure Item Date** – This is always entered as **today's date**. Enter today's date and then press the **Tab key**, or use the **calendar** icon to select today's date.

7. When the five Project fields have been completed click **Next**. Alternatively, you could click **Submit** if you do not wish to add notes or attachments to this requisition and follow the guidance in the *Checkout: Review and Submit* guide (follow the guide from step 2).
   The *Charge Account* field will not be updated to show the Project code on the *Checkout: Requisition Information* screen, but the iProc system will update the *Charge Account* information in the background when you click *Next* & *Submit* this requisition.

***Next step:* Follow the guidance in the *Checkout: Approvals and Notes* guide.**