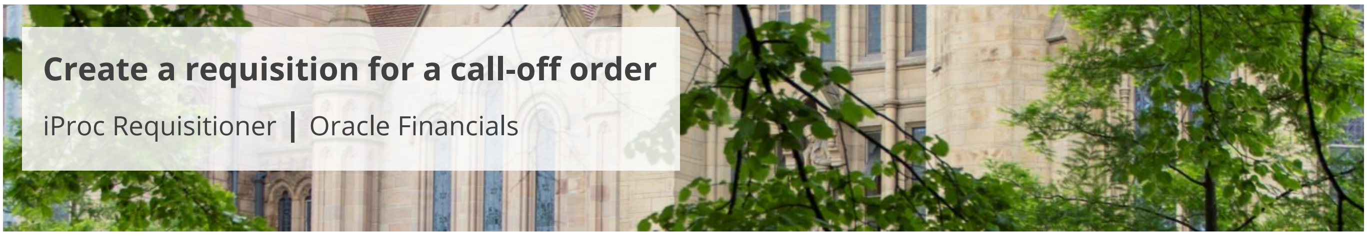

Create a requisition for a call-off order

iProc Requisitioner | Oracle Financials

This guide is intended for iProc Requisitioners who need to raise a requisition for a call-off order in the iProcurement (iProc) part of the Oracle Financials system. It covers the shopping for items part of the requisition process, in this case the items are not in eMarketplace and the requisition needs setting up in a particular way.

The requisition process:

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

What is a call-off order?

A call-off order can be used when you wish to purchase either goods or services over a period of time that may be supplied in irregular amounts or intervals and covers numerous individual orders and payments. They are typically used where individual spend cannot be predicted in advance (eg utility bills).

Requisitions for call-off orders are raised in exactly the same way as non-catalogue requests and are usually amount based requisitions.

When setting up a requisition for a call-off order, the *Unit of Measure* is set to *GBP* and the *Quantity* and *Price* are reversed so that the *Price* is 1 ie:

rather than:	Quantity: 1, Price: £2000
use: Quantity:	£2000, Price: 1

This simplifies the creation of part receipts. For example, to receipt £750 with a quantity of 2000 you would receipt 750. To receipt £750 with a quantity set to 1, you would need to receipt 0.375.

To create requisition for a call-off order you will need to:

1. Login to Oracle Financials via this link: http://financelive.fin.manchester.ac.uk/

2. Click the **PO Internet Procurement MP (UOM)** responsibility to open iProc.

> Always ensure your *Shopping Cart* is empty before proceeding with a new requisition.

3. Select the **Non-Catalog Request** link which can be found below the *Requisitions* tab

4. The **Item Type** defaults as *Goods billed by quantity*, but there are other options. When setting up a requisition for a call-off order, you must change the *Item Type* **Goods or services billed by**

amount. This will allow you to receipt against the amount. Once changed, the fields displayed on the non-catalogue request form will change.

5. Enter the **Item Description**. Start the description with *Call-off order...* as this will help the Operational Buyer and Central Accounts Payable identify these requisitions/orders more easily. Enter as detailed a description as you can, including start and end dates of when the goods/services will be provided if possible. Ensure any extra charges are included as an additional line. If too vague, incomplete or conflicting with the information on the invoice then the invoice will go on hold.

6. Enter the **Category** of spend. Enter the category code directly, or if you are unsure, use the **magnifying glass** to search. After completing your preferred search select the **Quick Select** icon to select the correct category code.

   What are category codes?

   Category codes are a way of labelling expenditure. The category code allows us to report accurate spends to external providers of funding, as well as allowing us to track category spend which can then be used by strategic procurement in negotiations with suppliers.

   Category codes are broken up into groups eg *Stationary & Office Supplies* or *Laboratory Supplies & Services*. Each group is assigned a letter to help you search eg *L* for *Laboratory Supplies & Services*.

   How can I search for category codes?

   In Oracle Financials, the wildcard is **%** and this helps with your searches.

   To see all category codes within a group, enter the group letter followed by the wildcard eg *L%.*

   Alternatively, you can change the **Search By** menu to **Description** and search by keyword eg *%apparatus%.* Using the wildcard at the front and end of the keyword means that you are looking for wherever that keyword appears in the description, whereas using % before the keyword searches for anything where the keyword is the last word, and using % after a keyword means the search will look for options where the keyword is at the front of the description.

   Searching by **Description** means you can also search using an IE (Income & Expenditure) code to see which category codes are mapped to the IE code eg *%6010%*.

   Where can I find a list of category codes?

   A full list of category codes can be found on the Procurement website for reference but if you are unsure please contact your Operational Buyer.

7. Enter the **Amount**. Enter the total amount for the call-off order. Usually this will be the contracted value for the year. This should always be entered net of VAT as VAT is calculated and added at the invoice input stage.

8. **Currency** defaults to *GBP*. Use the **drop-down menu** to select a different currency.

   If the incorrect currency is used then the purchase order (PO) generated cannot be used to pay the invoice and it will have to be manually authorised by the Approver.

   Requisitions on a Procurement Card must always be raised in GBP.

   Please note the exchange rate used within your requisition and include this in the *Item Description*.

   If you find a supplier who is setup to the wrong currency please contact the **Procurement Office** to amend.

9. Enter the **Supplier Name** directly into the field or use the **magnifying glass** icon to search. After completing a search select the **Quick Select** icon to select the correct supplier/site. Once selected, the supplier site and contact details will populate automatically.

What if I don't know which supplier to use?

If you're not sure which supplier to select, you should first look in **CuPID** to see the University recommended supplier for this product/service.

Which supplier site should I select?

In some instances there may be multiple sites to select from. Choosing the correct site is very important to ensure your order is sent to the right location. Procurement is currently cleaning the supplier data in an attempt to make this process simpler.

What if the supplier isn't listed in Oracle?

If you've searched and the supplier isn't listed in Oracle, you'll need to complete the **New Supplier Process** using the **Can't find the right supplier?** link above the *Supplier Name* field. Download and complete the form and return to the **Procurement Office**.

10. Check that all of the details are correct for this item and then select **Add to Cart**. The item is now shown in your *Shopping Cart*.

11. To add more items to the *Shopping Cart*, repeat steps 4 – 9, changing the fields **(except *Supplier* – *see the note below*)** for the second item as appropriate. Click **Add to Cart** to add any additional items to the requisition.

Note that the *Supplier* fields are left the same on additional lines on the requisition, as you only raise a requisition with one supplier!

12. Continue repeating the steps until you have added all items in your Shopping Cart. The maximum number of lines on a requisition is **50**.

13. If you've finished adding items, select **View Cart and Checkout** below the *Shopping Cart* area.

Next step: Follow the guidance in the [Shopping Cart](#) guide.