Create a Non-Catalogue Request

iProc Requisitioner | Oracle Financials

This guide is intended for iProc Requisitioners who need to raise a non-catalogue request via 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.

The requisition process:

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

What is a non-catalogue request?

If the supplier's catalogue is not held on the iProc system or available through eMarketplace, you'll need to complete a non-catalogue request. Please make sure you know which supplier you intend to use before starting a non-catalogue request. You should also be familiar with the CuPID database of University recommended suppliers.

Important: Do not raise requisitions for a Procurement Card in iProc. Please speak to your Operational Buyer for advice on these transactions.

To create a non-catalogue request you will need to:

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

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

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

3. The **Item Type** defaults as *Goods billed by quantity*, but there are other options. A non-catalogue request can be used when you wish to purchase a defined amount of goods or services supplied in one instance. This does not exclude part deliveries and part invoicing.

   When setting up a non-catalogue request like this you should use the **Item Type** *Goods billed by quantity*. This allows you to input the literal quantity of items and the unit value per item and receipt per item.

   Example: ordering 10 pine desks at £100 each:

   rather than: Quantity: 1, Price: £1000 or Quantity: 1000, Price: £1

   use: Quantity:10, Price: £100

   This will simplify the creation of partial receipts , ie to receipt 8 tables with a Quantity of 10, you would receipt 8. To receipt 8 tables with a Quantity set to 1, you would need to receipt 0.8.

4. Enter the **Item Description**. You can copy and paste the item description from a supplier's website, but be sure to remove any trademark and copyright symbols. Include the supplier's catalogue number if you have one, or any other information eg ISBN, product code or item reference.

   The *Item Description* is **important** because if it is too vague, incomplete or conflicting with the information on the invoice then the invoice will go on hold. Ensure any extra charges are included as an additional line.

5. 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.

6. Enter the **Quantity**.

7. Enter the **Unit of Measure** directly into the field if you know it (or the first few letters) and then press the **Tab key**. Examples include *Each*, *ml*, *gm*, *trays, and bags*. Alternatively, use the **magnifying glass** icon to search. You can use the **%** wildcard to see all available values.

8. Enter the **Unit Price**. This should always be entered net of VAT as VAT is calculated and added at the invoice input stage.

9. **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.

10. 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 it to the **Procurement Office**.

11. 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*.

12. To add more items to the *Shopping Cart*, repeat steps 3 – 11, 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!

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

14. 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.