

# Oracle / iProc

## E-Catalogue & Non Catalogue Requisitions

Presentation by

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on behalf of the Procurement Department

# Changes to Procurement

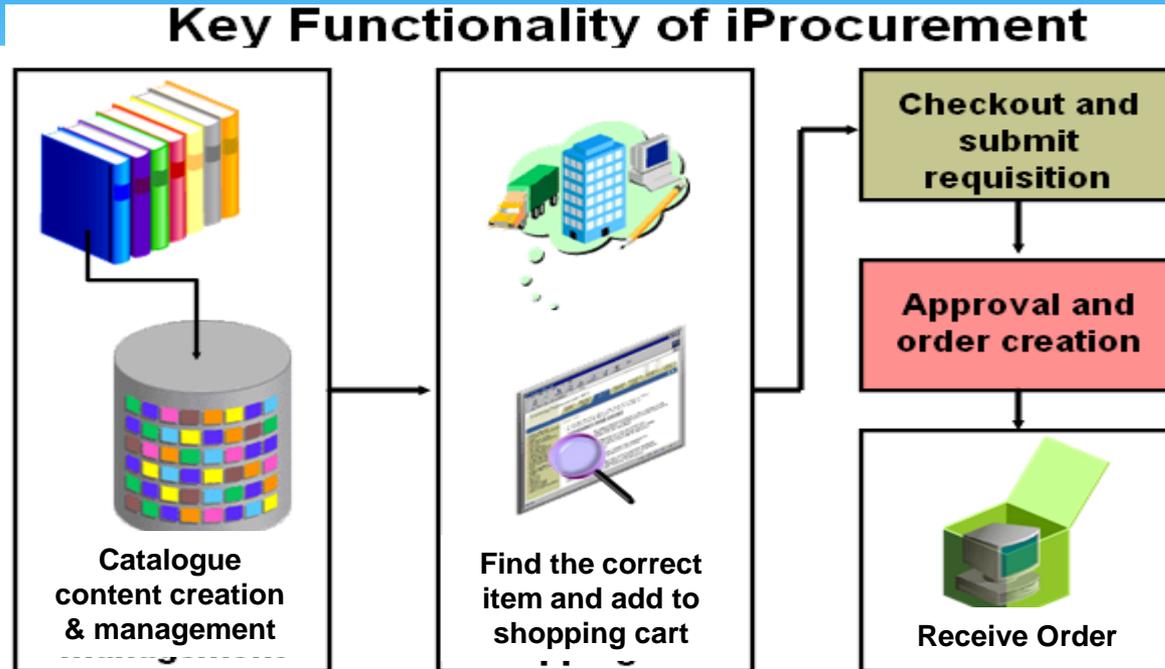
**iProc / Oracle**

**Changes to Non-Stock Procurement Only**

# Supplier E-Catalogues - The Benefits

- \* Large database of products to purchase from.
- \* Multiple word search for products.
- \* Contract pricing already set.
- \* Better descriptions already set.
- \* Accurate category coding already set (reports).
- \* Better budget control.
- \* Processing time reduced.
- \* Savings for the Trust.
- \* Less incorrect deliveries.
- \* Suppliers see the benefits and pass on discounts.
- \* Paperless system.

# E-Catalogue Process – How Does it Work?



- Supplier e-catalogues created within procurement.
- Requisitioner enters product code or searches for product then adds product to cart.
- Continue as before and submit requisition.
- Approval by budget holder.
- Supplier receives order.

# What can we E-Catalogue?

- \* Any national framework contracts.
- \* Trust contracts.
- \* Products that are purchased on a regular basis (within SFI limits).

# Items that are difficult to E-Catalogue

- \* Maintenance / Services / Works.
- \* Period orders / Call off orders.
- \* One off purchases such as capital Items or unique requirements.
- \* Staffing agencies (future development).
- \* Printing (future development).

# iProc Requisitions

## Navigating between e-catalogue and non-catalogue screens

Requisition	Description	Total (GBP)	Status	Copy	Change	Express Receive
10008553	M20EHA	79.47	Approved	[icon]	[icon]	[icon]
10008072	Office Chairs x 2 (Cat & Non Cat)	163.00	Approved	[icon]	[icon]	[icon]
10002937	ST298AQ-100 - LADIES S/S TUNIC AQUA/WHITE (CONTRACT REF FAG51C000) - EACH	12.58	Cancelled	[icon]	[icon]	[icon]
3677	CTM 4 user Annual Licence and implementation	7000.00	Approved	[icon]	[icon]	[icon]
595	Chair	135.86	Approved	[icon]	[icon]	[icon]

Type	From	Subject	Sent
PO Approval	Patel, Mr. Mohamed	Standard Purchase Order 25007463 has been approved	14/05/2009
PO Approval	Patel, Mr. Mohamed	Standard Purchase Order 19114978 has been approved	22/01/2009
PO Requisition Approval	Patel, Mr. Mohamed	Purchase Requisition 114041 has been approved	22/01/2009
PO Approval	Patel, Mr. Mohamed	Standard Purchase Order 25005888 has been approved	20/01/2009
PO Requisition Approval	Patel, Mr. Mohamed	Purchase Requisition 2007861 has been approved	20/01/2009

The screen that appears when you first log in to iProc.

- E-Catalogue ordering is done via the front screen – by entering a product code or searching via key a word/s where shown above (when searching via words enter % at the start and finish).
- For Non-Catalogue ordering – Click on the Non-Catalogue request button.

**Note – You should always check to see if a product is available via e-catalogue prior to raising a non-catalogue request**

# What's the difference – Non-Catalogue

Oracle iProcurement: Shop - Windows Internet Explorer

http://patfinfall.lrh-tr.nhs.uk:8002/OA\_HTML/OA.jsp?page=/oracle/apps/ics/catalog/shopping/webui/NonCatalogRequestPG8

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Diagnostics

Stores | Categories | Shopping Lists | Non-Catalog Request | Contractor Request

Shop Requisitions Receiving Contractors

Non-catalog Request Store

\* Indicates required field

Clear All Add to Cart Add to Favorites

Shopping Cart  
Your cart is empty.

\* Request Type: New  
\* Item Type: Goods billed by quantity  
\* Item Description: [empty]  
\* Category: [empty]  
\* Quantity: [empty]  
\* Unit of Measure: EACH  
\* Unit Price: [empty]  
\* Currency: GBP

Contract Number: [empty]  
Supplier Name: [empty]  New Supplier  
Site: [empty]  
Contact Name: [empty]  
Phone: [empty]  
Supplier Item: [empty]

Clear All Add to Cart Add to Favorites

Shop | Requisitions | Receiving | Contractors | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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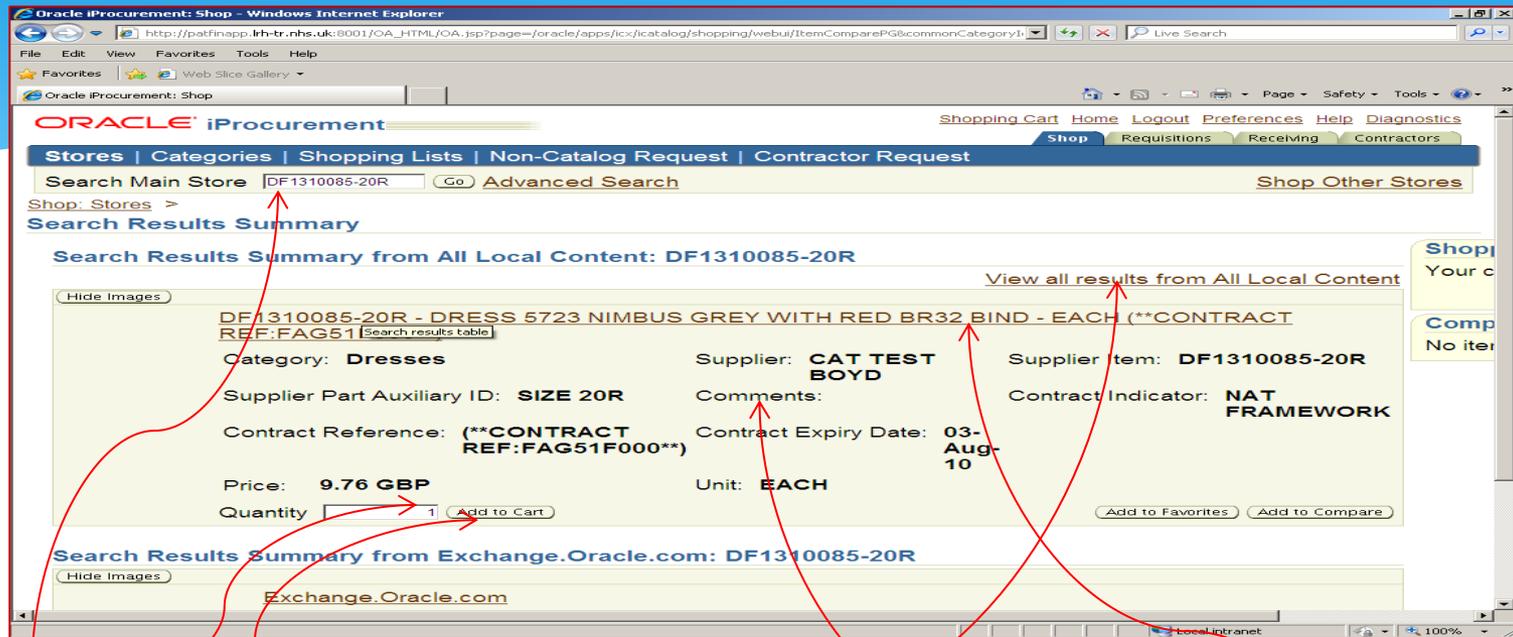
By clicking on “shop” – iProc will take you back to the front screen.

## Fields required to be completed.

- \* Item description / product code.
- \* Category coding.
- \* Unit of measure.
- \* Unit price.
- \* Supplier name.
- \* Supplier site.

**Note - Always check to see if products are available via e-catalogue prior to raising a non-catalogue request.**

# What's the difference - E-Catalogues



- \* Search main store - Enter item code or search by word / multiword (use % as your wildcard).
- \* Enter quantity.
- \* Add to cart.
- \* Done – All other information has already been completed for you.

## Note – Always check

- \* The product shown is what you require – do not just add to cart without checking first!
- \* The comments field – this may contain important information regarding the product and will also inform you if a carriage line needs to be added onto the requisition!
- \* Some products may have multiple lines for the same product (e.g. shoes size or colours), when this happens you will see the first 3 options appear on screen, to ensure all options are shown **Click on view all results.**

# Comments Section

The screenshot shows the Oracle iProcurement Shop interface. At the top, there is a search bar with the text 'CARRCATT' entered. Below the search bar, the search results summary for 'DF1310085-20R' is displayed. The product details include: 'DF1310085-20R - DRESS 5723 NIMBUS GREY WITH RED BR32 BIND - EACH (\*\*CONTRACT REF:FAG51)'. The comments section is highlighted with a red arrow and contains the text 'CARRIAGE APPLIES SEARCH CARRCATT'. The supplier is 'CAT TEST BOYD' and the supplier item is 'DF1310085-20R'. The contract reference is '\*\*CONTRACT REF:FAG51F000\*\*' and the contract expiry date is '03-Aug-10'. The price is '9.76 GBP' and the unit is 'EACH'. The quantity is set to '1'. There are buttons for 'Add to Cart', 'Add to Favorites', and 'Add to Compare'. The search results summary from Exchange.Oracle.com is also visible below.

The comments section indicates important information regarding the product or carriage. The above case shows that the requisition will require a carriage line adding to it.

\* Carriage is always set out in the same format = CARR + the first 4 letters of the suppliers name – In this case CARRCATT

\* Search for carriage as you would for any product, simply type (in this example) CARRCATT in the search field, then click go.

# Carriage Screen

The screenshot displays the Oracle iProcurement Shop interface in a Windows Internet Explorer browser. The search results for '%carrboyd%' are shown, featuring a product listing for 'CARRBOYD - CARRIAGE IS FREE'. The product details include:

- Category: Dresses
- Supplier: BOYD COOPER LTD
- Supplier Part Auxiliary ID: CARRIAGE
- Comments: (\*\*CONTRACT REF:NHS/11/MS/BAZ/6647\*\*)
- Contract Reference: (\*\*CONTRACT REF:NHS/11/MS/BAZ/6647\*\*)
- Contract Expiry Date: 31/03/2014
- Price: 0 GBP
- Unit: EACH

The interface also shows a 'Shopping Cart' summary on the right, indicating 2 lines in the cart. The bottom of the page contains navigation links and a copyright notice for 2006.

- \* Carriage screen appears.
- \* Add to cart as normal.
- \* **Note – That sometimes more than one option will appear. For example, there could be one for standard carriage, plus one for urgent carriage (Both will be seen at the same time).**

# Shopping Cart

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lth-tr.nhs.uk:8001/OA\_HTML/OA.jsp?OAFunc=ICX\_POR\_SHOPPING\_CART&retainAM=Y&\_ti=1818123751&oapc=11&oas=P728zzrfwOK

Oracle iProcurement

Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

Shop | Requisitions | Receiving | Contractors

Shopping Cart

Save Checkout

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (GBP)	Delete
1	DF-1310085-20R - DRESS 5723 NIMBUS GREY WITH RED BR32 BIND - EACH (**CONTRACT REF:NHS/11/MS/BAZ/6647**)		EACH	1	9.76 GBP	9.76	
2	Icecream chocolate flavour 5ltr		EACH	1	4.99 GBP	4.99	
Total						14.75	

Return to Shopping

Shop | Requisitions | Receiving | Contractors | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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Done

Local intranet | Protected Mode: Off

12:58 18/06/2013

Shopping Cart -  
Double check that  
the products &  
quantity you require  
are correct.

The click on  
checkout to proceed.

# Checkout Requisition Information

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lrh-tr.nhs.uk:8001/OA\_HTML/OA.jsp?pages=/oracle/apps/ixc/por/req/webui/ShoppingCartPG&OASF=ICX\_POR\_SHOPPING\_CART&reta

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving Contractors

Requisition Information Approvers Review & Submit

Checkout: Requisition Information

\* Indicates required field

\* Requisition Description DF1310085-20R - DRESS 5723 NIMBUS GREY WITH RE

Cancel Save Edit Lines Step 1 of 3 Next

Delivery Billing

\* Need-By Date 02/07/2013 00:00:00  
(example: 18/06/2013 19:45:00)

\* Requester Lewis, Mr. Darren

\* Deliver-To Location LEICESTERSHIRE PARTI  
[Enter one-time address](#)

\* Taxable Yes

\* Tax Code ZER

Charge Account Enter Charge Account

Cancel Save Edit Lines Step 1 of 3 Next

Shop Requisitions Receiving Contractors Shopping Cart Home Logout Preferences Help Diagnostics

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Done.

Local intranet | Protected Mode: Off

12:59  
18/06/2013

Deliver to location – This must be changed to where you wish the goods to be delivered. Click on the torch button to help to navigate to the correct location.

**Note – If the delivery location is not changed, your goods could be delivered to towers hospital.**

Click on this to enable the charge account screens to appear.

# Edit Lines

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lrh-tr.nhs.uk:8001/OA\_HTML/OA.jsp?page=/oracle/apps/cx/por/req/webui/CheckoutSummaryPG&porMode=display&porSummaryP...

Oracle iProcurement: Checkout

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

Shop | Requisitions | Receiving | Contractors

Requisition Information | Approvers | Review & Submit

Requisition Information: Edit Lines

\* Indicates required field

Delivery | Billing | Accounts | Attachments

Select Lines: Update | Copy | Delete

Select All | Select None

Select Line	Description	Charge Account	Split
<input type="checkbox"/> 1	DF1310085-20R - DRESS 5723 NIMBUS GREY WITH RED BR32 BIND - EACH (**CONTRACT REF:NHS/11/MS/BAZ/6647**)	Enter Charge Account	
<input type="checkbox"/> 2	Icecream chocolate flavour 5ltr	Enter Charge Account	

TIP Click on a Split icon to allocate costs to multiple accounts.

Delivery | Billing | Accounts | Attachments

Return

Shop | Requisitions | Receiving | Contractors | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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Done

Local intranet | Protected Mode: Off

13:00 18/06/2013

Click on Enter Charge Account.

# Requisition info: Split Cost Allocation

The screenshot shows the Oracle iProcurement Checkout interface. The main heading is "Requisition Information: Split Cost Allocation". Below this, there is a "Selected Line" table and a "Split Cost Allocation" table.

Line Description	Unit	Quantity	Price	Amount (GBP)
2 Icecream chocolate flavour 5ltr	EACH	1	4.99 GBP	4.99

Line	LPT Accounting Flexfield	Percent	Quantity	Amount (GBP)	Delete
1	Organisation-Cost Centre-Subjective-Analysis-Spare	100	1	4.99	
<a href="#">Add Another Row</a>		100	1	4.99	

A red arrow points from the "Add Another Row" button to the text: "Account code can be split or you can apply the same code by clicking on the button shown."

Below the tables, there are checkboxes for "TIP Total allocation must equal 100% of the selected line values." (checked) and "Apply this Cost Allocation information to all applicable requisition lines." (unchecked).

Account code can be split or you can apply the same code by clicking on the button shown.

# LPT Accounting Flexfield

Search and Select List of Values - Windows Internet Explorer

Search and Select: LPT Accounting Flexfield

Search

\* Organisation: LE  
Leicestershire partnership Trust

\* Cost Centre: 8730  
Commercial Support

\* Subjective: 6358  
Welfare Foods

\* Analysis: 0000

\* Spare: 0000

Default  
Search Clear

Results

Create

Select Code Combination

LE-8730-6358-0000-0000
------------------------

Cancel Select

Done. Local intranet | Protected Mode: Off 13:07 18/06/2013

Organisation defaults to LE

Cost Centre – click on the torch and type in the your department to obtain the code.

Subjective – click on the torch and description to find the appropriate code.

Analysis & Spare defaults to 0000.

Click on create.

Click on Select.

# Split Cost Allocation

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lrh-tr.nhs.uk:8001/OA\_HTML/OA.jsp?page=/oracle/apps/icx/por/req/webui/CheckoutLinesPG&porMode=display&OA\_SubTabIdx=-1&

Oracle iProcurement: Checkout

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving Contractors

Requisition Information Approvers Review & Submit

Requisition Information: Split Cost Allocation

\* Indicates required field

Selected Line

Line Description	Unit	Quantity	Price	Amount (GBP)
2 Icecream chocolate flavour 5ltr	EACH	1	4.99 GBP	4.99

Projects Charge Accounts

Line	LPT Accounting Flexfield	Percent	Quantity	Amount (GBP)	Delete
1	LE-8730-6358-0000-0000 Organization-Cost Centre-Subjective-Analysis-Spare	100	1	4.99	
Add Another Row		Total	100	1	4.99

Projects Charge Accounts

TIP Total allocation must equal 100% of the selected line values.

Apply this Cost Allocation information to all applicable requisition lines

Return

Shop Requisitions Receiving Contractors Shopping Cart Home Logout Preferences Help Diagnostics

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• Split cost allocation (optional).

• Click to duplicate account code across all req. lines.

• Click on return.

# Review Approver List

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Shopping Cart Home Logout Preferences Help Diagnostics  
Shop Requisitions Receiving Contractors

Requisition Information Approvers Review & Submit

**Confirmation**  
Attachment "Text" has been added successfully but not saved. Complete your work to save your attachment.

Checkout: Review Approver List  
Your requisition will be sent to the following list of approvers. [Save](#) [Back](#) [Step 2 of 3](#) [Next](#)

[Change First Approver](#)

Approver Name	Delete
Holloway, Mrs. Jennifer	Delete

[Add Approver](#)

Note To Approver: Details can be enter for catalogue and non-catalogue reqs.

Note To Buyer: This should only be used for a non-catalogue req.

**Attachments**  
[Add Attachments](#)

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Undefined	Short Text	Darren Lewis 0116 295 0438	To Supplier	DLEWIS	18/06/2013	One-Time			

[Save](#) [Back](#) [Step 2 of 3](#) [Next](#)

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## Note - important changes

- Note to approver (**no change**) - This can be used for **both e-catalogue and non-catalogue** requisitions.
- Note to buyer (**change**) - Can only be used for **non-catalogue** requisitions.
- Information for suppliers (**Change**) - To add additional information to a purchase order (such as delivery requests etc.) click here. This will bring up the **suppliers information screen**.

# E-Catalogue Purchase Orders

## How to add information for suppliers

### Important Note

Prior to the introduction of e-catalogues, any additional notes that were required for the supplier, were entered onto the note for buyer section. This would then be checked by the procurement team and then added onto the PO.

As purchase orders now go directly to suppliers (e-catalogue orders only), the only way to enter information for them to see on the PO, is to follow this section.

### Process: -

- Ensure the category is set to supplier.
- Enter name in description field.
- Ensure text is ticked.
- Give detailed description of what you required the supplier to do (Only this information will appear on the purchase order).

The screenshot shows the Oracle iProcurement 'Add Attachment' form. The 'Attachment Summary Information' section has 'Description' set to 'Darren Lewis 0116 295 0438' and 'Category' set to 'To Supplier'. The 'Define Attachment' section has 'Text' selected, with the text 'This department closes at 12.30pm - no deliveries will be accepted after this time' entered in the text area. Red arrows indicate the flow of information from the form fields to the process steps on the right.

Please note - any information sent to suppliers will be monitored (audit requirement).

# Review & Submit

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lfh-tr.nhs.uk:8001/OA\_HTML/OA.jsp?page=/oracle/apps/icc/por/approval/webui/ReqApprListPG&\_ti=1818123751&retainAM=Y&Mod=...

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Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving Contractors

Requisition Information Approvers Review & Submit

Checkout: Review and Submit Requisition

Save Printable Page Back Step 3 of 3 Submit

Requisition 10009073: Total 14.75 GBP

Created By Lewis, Mr. Darren  
Creation Date 04/04/2013 14:35:15  
Description DF1310085-20R - DRESS 5723 NIMBUS GREY WITH RED BR32 BIND - EACH (\*\*CONTRACT REF:NHS/11/MS/BAZ/6647\*\*)  
Justification Details can be enter for catalogue and non-catalogue reqs.

Requisition Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Undefined	Short Text	Darren Lewis 0116 295 0438	To Supplier	DLEWIS	18/06/2013	One-Time			

Lines

Details	Line	Description	Cost Center	Unit	Quantity	Price	Amount (GBP)	Attachments
Show 1	1	DF1310085-20R - DRESS 5723 NIMBUS GREY WITH RED BR32 BIND - EACH (**CONTRACT REF:NHS/11/MS/BAZ/6647**)	8730	EACH		19.76 GBP	9.76	
Show 2	2	Icecream chocolate flavour 5ltr	8730	EACH		14.99 GBP	4.99	
							Total	14.75

Save Printable Page Back Step 3 of 3 Submit

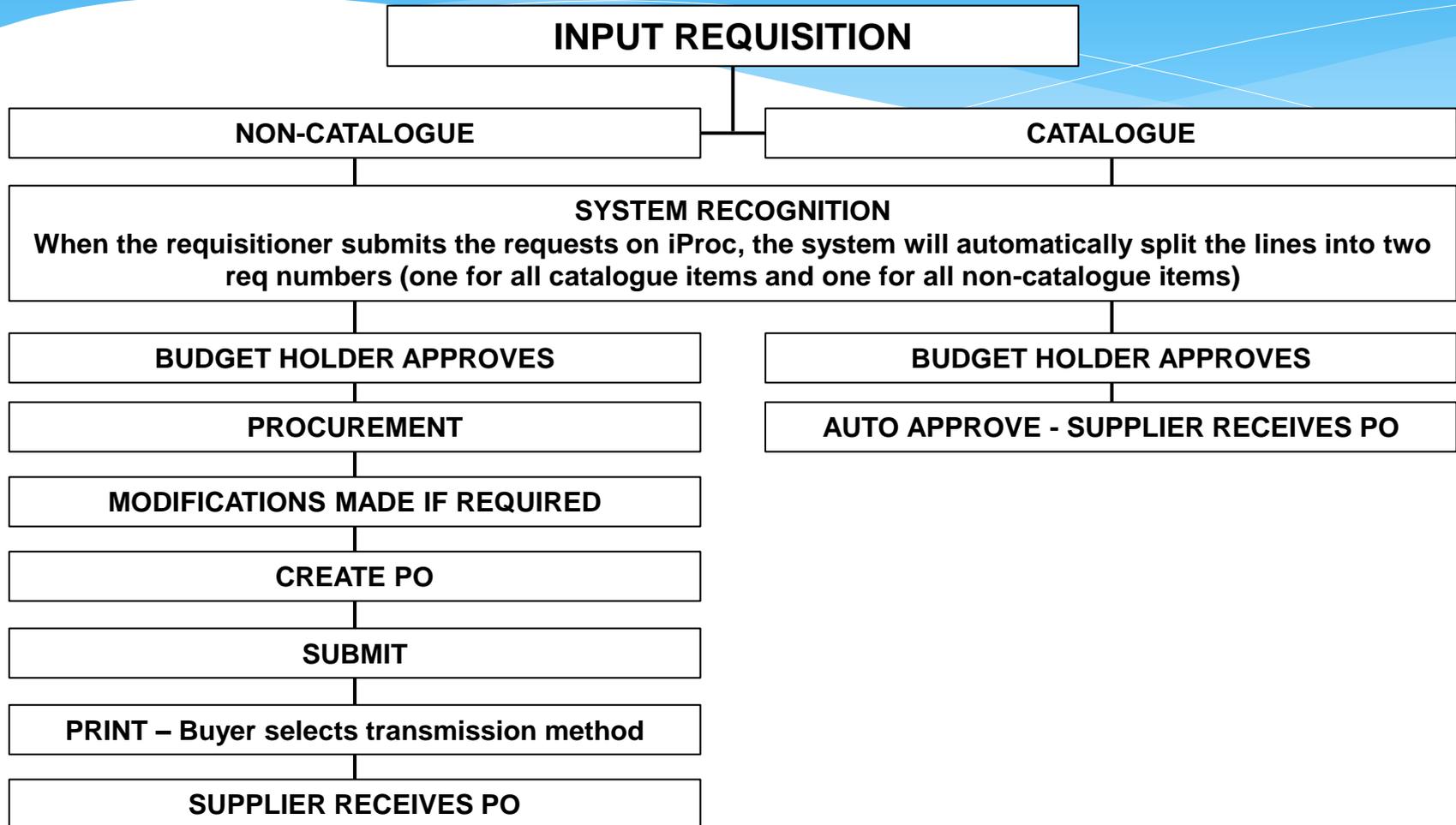
Shop | Requisitions | Receiving | Contractors | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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- Check details, then submit.
- The requisition will then go to the approver.
- E-catalogue purchase orders will go direct to the supplier via the system.
- If your requisition contains a e-catalogue and a non-catalogue req line, the system will split them so two order numbers are raised.

**Note - procurement will be monitoring all e-catalogue & non-catalogue requests.**

# Requisition with E-Catalogue and Non-Catalogue Products – System Process



# Future Developments

- \* Product Images shown on iProc (in process)
- \* Punch-out sites direct to suppliers.
- \* Standardisation of some types of products.
- \* Some printing & staff agencies to be added.

# Things to remember

- \* Supplier e-catalogues have been set up to save you time and money for the Trust.
- \* Always check to see if a product is available via e-catalogue prior to using the non-catalogue option.
- \* Always check the comments field for product information and carriage details.
- \* Carriage – prefix is always CARR followed by the first 4 letters in the suppliers names.
- \* Please contact the e-catalogue team if you encounter any errors or if you wish to add any supplier and/or products.
- \* Remember to change your delivery location.
- \* Some products have multiple lines for the same product (e.g. shoe sizes), when this occurs, you will see the first 3 options, to see all options click on view all results.
- \* **Please note - that although great care has been taken when producing these e-catalogues, - it is the end user's (your) responsibility to check that product details are correct prior to them being added to cart.**

# E-Catalogue Supplier's Available AS @ 01/07/2013

A ALGEO LTD  
ABBOTT LABORATORIES LTD  
ALEXANDRA PLC  
AMBE MEDICAL GROUP  
B & D ELECTROMEDICAL  
BAKER ROSS LTD  
BOYD COOPER LTD  
BUSINESS DICTATION LTD  
COVIDIEN(UK) COMMERCIAL LTD  
DEVILBISS HEALTHCARE LTD  
EMERGENT CROWN  
GODFREY SYRETT LIMITED  
GRAHAME GARDNER LTD  
HENRY SCHEIN MEDICAL  
HOSPITAL METALCRAFT LTD – LIVE FROM 08/07/2013  
INTUS HEALTHCARE LIMITED  
KAPITEX HEALTHCARE LTD  
K-BINS LTD  
KETTERING SURGICAL APPL LTD  
LAERDAL MEDICAL LTD  
MALEM MEDICAL  
MED-FIT UK LTD  
MELTEMI COMPANY CLOTHING LTD  
NOTTINGHAM REHAB SUPPLIES – LIVE FROM 08/07/2013

OSWALD DONNER LTD  
P3MEDICAL LTD  
PARK HOUSE HEALTHCARE LTD  
PATTERSON MEDICAL  
PINEAPPLE CONTRACTS  
PLATON MEDICAL LTD  
PROMEDICS ORTHOPAEDIC  
ROCOM GROUP LTD  
ROMPA LIMITED  
RS COMPONENTS LTD  
SABER OFFICE FURNITURE LTD  
SCALEWAYS (LEICESTER) LTD  
SIR SCOT YOUNG RESEARCH  
SPECIALIST CRAFTS LTD  
STEARN ELECTRIC CO LTD  
SUPERDRAGON TCM UK LTD  
U GROUP LTD  
VALLEY NORTHERN  
WELCONSTRUCT GROUP LTD T/A WELCO  
  
WHITE MEDICAL  
WINSLOW  
WRS GROUP U K  
XMA

# E-Catalogue Team

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