

Oracle / iProc

E-Catalogue & Non Catalogue Requisitions

Presentation by

Darren Lewis (Interim E-Catalogues Manager)

Mohamed Patel (Contracts Officer)

on behalf of the Procurement Department

Changes to Procurement

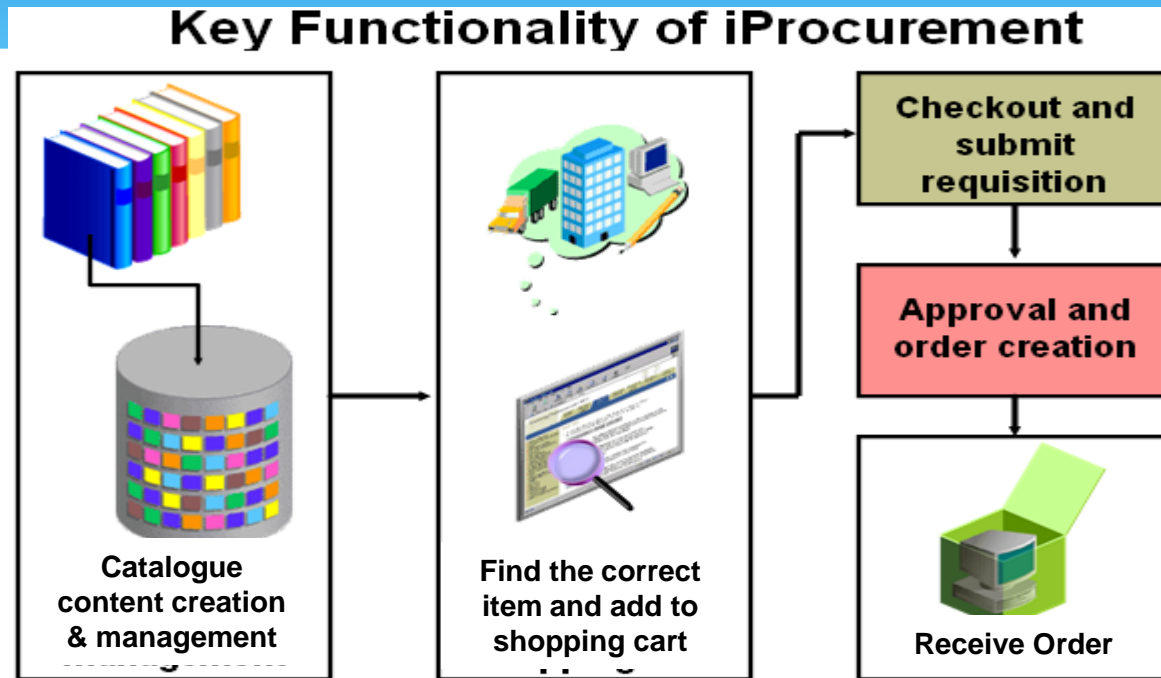
iProc / Oracle

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

Oracle iProcurement: Shop - Windows Internet Explorer

http://patfinapp.lrh-tr.nhs.uk:8001/OA_HTML/RF.jsp?function_id=7330&resp_id=50428&resp_appl_id=178&security_group_id=0&lang_code=US¶n...

File Edit View Favorites Tools Help

Oracle iProcurement: Shop - Windows Internet Explorer

Oracle iProcurement

Shopping Cart Home Logout Preferences Help Diagnostics

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

Search Main Store Go Advanced Non-Catalog Request

Stores

Main Store Main Store Exchange.Oracel.com

My Requisitions

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

Full List

My Notifications

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

TIP Vacation Rules - Redirect or auto-respond to notifications.

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

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http://patfinapp.lrh-tr.nhs.uk:8001/OA_HTML/OA.jsp?page=/oracle/apps/ixc/catalog/shopping/webui/NonCatalogRequestPG&ti=1494 Local intranet | Protected Mode: Off 100%

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/icx/catalog/shopping/webui/NonCatalogRequestPG8

File Edit View Favorites Tools Help

Oracle iProcurement: Shop

Shopping Cart Home Logout Preferences Help Diagnostics

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

Non-catalog Request Store

* Indicates required field

* Request Type: New

* Item Type: Goods billed by quantity

* Item Description:

* Category:

* Quantity:

* Unit of Measure: EACH

* Unit Price:

* Currency: GBP

Contract Number:

Supplier Name:

Site:

Contact Name:

Phone:

Supplier Item:

Clear All Add to Cart Add to Favorites

Shopping Cart

Your cart is empty.

Clear All Add to Cart Add to Favorites

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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

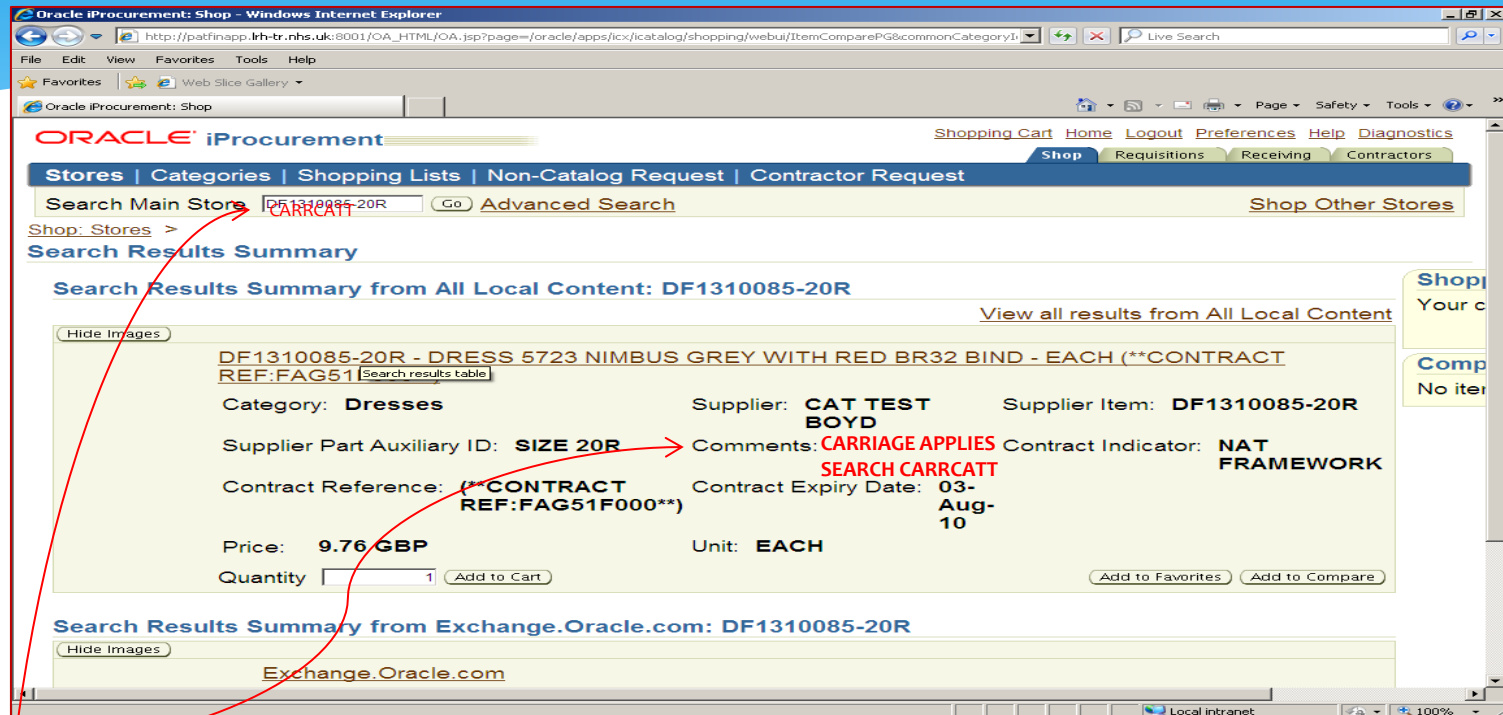


- * Search main store - Enter item code or search by word / multiword (use % as your wildcard).
- * Enter quantity.
- * Add to cart.
- * Done – All other information has already been completed for you.

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 happen you will see the first 3 options appear on screen, to ensure all options are shown **Click on view all results.**

Comments Section

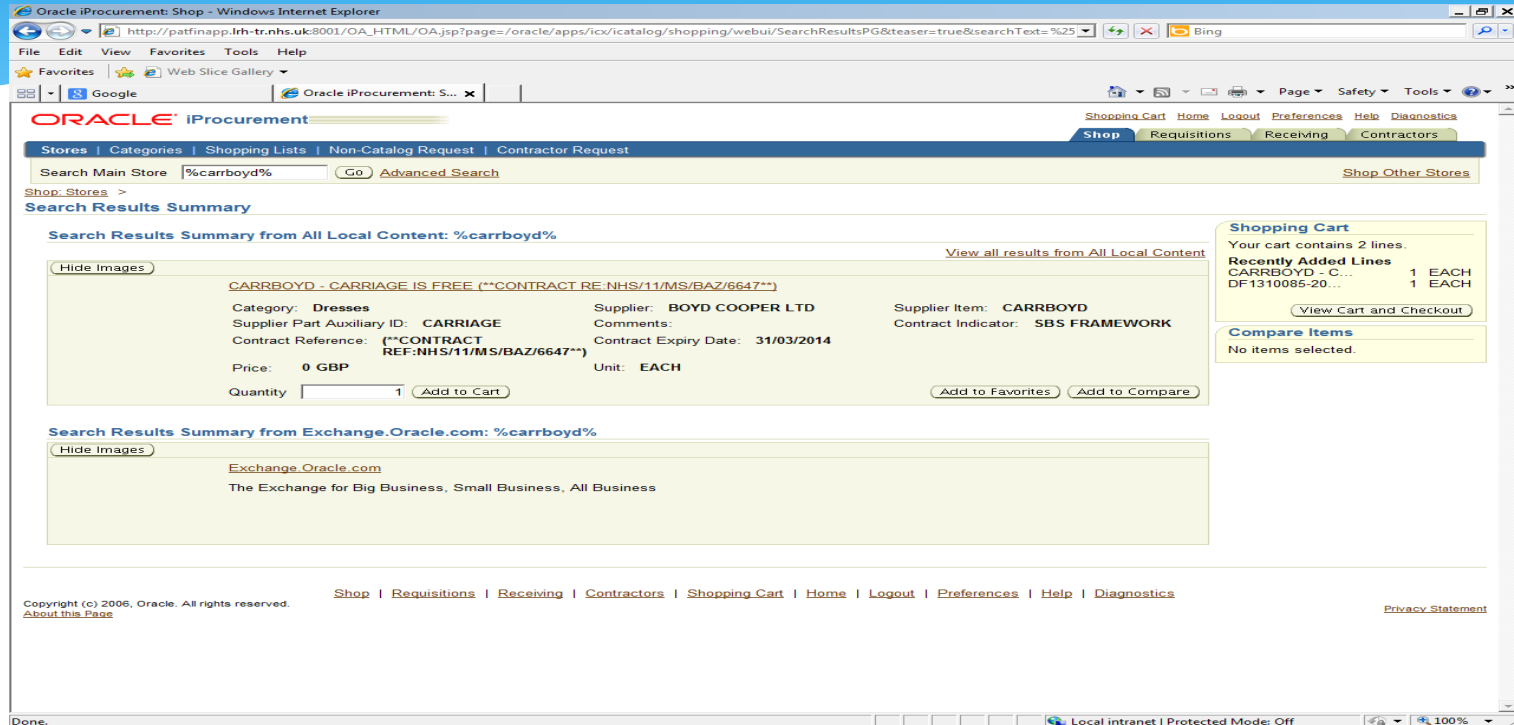


The comments section indicates important information regarding the product or carriage. The above case shows that the requisition will require a carriage line adding to it.

* 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



- * 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&oaapc=11&oas=P728zzrfwOK

Oracle iProcurement: Checkout

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	DF1310085-20R - 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

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Save Checkout

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/webui/ShoppingCartPG&OASF=ICX_POR_SHOPPING_CART&reta

Oracle iProcurement: Checkout

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

* 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](#)

Billing

* Taxable Yes

* Tax Code ZER

Charge Account [Enter Charge Account](#)

Cancel Save Edit Lines Step 1 of 3 Next

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Done.

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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/px/por/req/webui/CheckoutSummaryPG&porMode=display&porSummaryP...

Oracle iProcurement: Checkout

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

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Done

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100%

13:00
18/06/2013

Click on Enter Charge Account.

Requisition info: Split Cost Allocation

Oracle iProcurement: Checkout - Windows Internet Explorer

http://patfinapp.lrh-tr.nhs.uk:8001/OA_HTML/OA.jsp?page=/oracle/apps/ix/port/req/webui/CheckoutLinesPG&portMode=display&OA_SubTabIdx=-1&

Oracle iProcurement: Checkout

Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving Contractors

Requisition Information Approvers Review & Submit

Requisition Information: Split Cost Allocation

Indicates required field

Return

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	Organisation-Cost Centre-Subjective-Analysis-Spare	100	1	4.99	
Add Another Row					
		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

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Done

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13:02
18/06/2013

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

LPT Accounting Flexfield

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

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.lth-tr.nhs.uk:8001/OA_HTML/OA.jsp?page=/oracle/apps/ixc/por/req/webui/CheckoutLinesPG&porMode=display&OA_SubTabIdx=-1&

Oracle iProcurement: Checkout

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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

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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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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. [v]

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

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	[Update]	[Delete]	[Publish]

[Save] [Back] Step 2 of 3 [Next]

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Note - important changes

- Note to approve (**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 'Add Attachment' form in the Oracle iProcurement system. The form is divided into two main sections: 'Attachment Summary Information' and 'Define Attachment'. In the 'Attachment Summary Information' section, the 'Description' field contains 'Darren Lewis 0116 295 0438' and the 'Category' is set to 'To Supplier'. In the 'Define Attachment' section, the 'Type' is set to 'Text' (indicated by a red arrow), and the 'Text' area contains the message 'This department closes at 12.30pm - no deliveries will be accepted after this time' (also indicated by a red arrow). The 'Name' field is empty. Red arrows from the 'Process' list on the right point to these specific fields: 'Category', 'Description', 'Text' type, and the text content area. The form includes navigation links at the top (Shopping Cart, Home, Logout, Preferences, Help, Diagnostics) and at the bottom (Shop, Requisitions, Receiving, Contractors, Shopping Cart, Home, Logout, Preferences, Help, Diagnostics). The footer includes copyright information (Copyright (c) 2006, Oracle. All rights reserved.) and a privacy statement link.

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

Review & Submit

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http://patfinapp.lrh-tr.nhs.uk:8001/OA_HTML/OA.jsp?page=/oracle/apps/proc/approval/webui/ReqApprListPG&_ti=1818123751&retainAM=Y&Mod=

Oracle iProcurement: Checkout

ORACLE iProcurement

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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	1	19.76 GBP	9.76	
Show 2	2	Icecream chocolate flavour 5ltr	8730	EACH	1	14.99 GBP	4.99	
							Total	14.75

Save Printable Page Back Step 3 of 3 Submit

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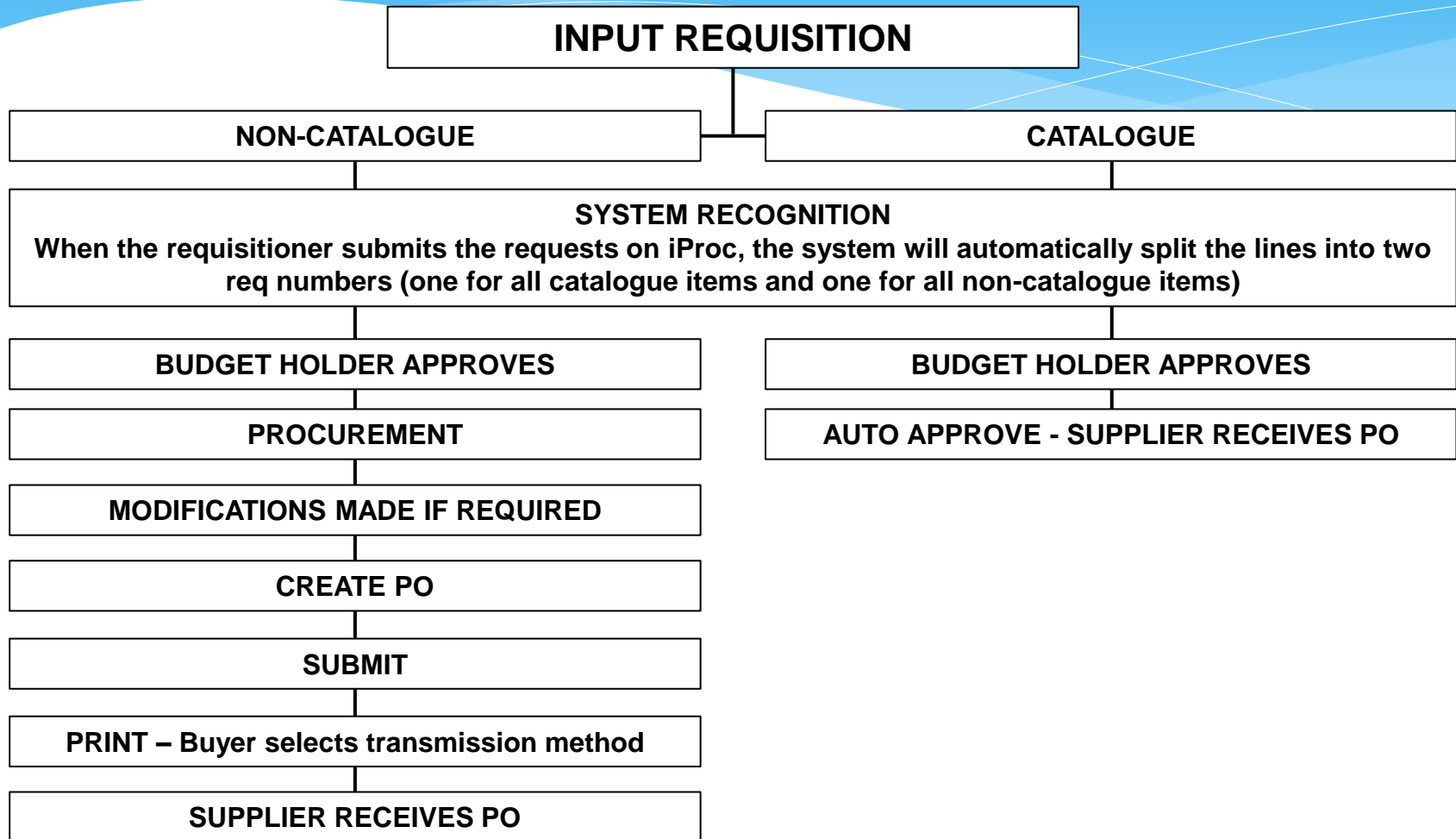
Shop Requisitions Receiving Contractors Shopping Cart Home Logout Preferences Help Diagnostics

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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
STEARNS 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

- * Mohamed Patel – 0116 295 0433
- * Email – catalogue.helpdesk@leicspart.nhs.uk