

### 3.4.7 Oracle iProc User Training Guide

Issue Date February 2010, page 1 of 5

Responsible Person(s): Buying Systems Trainer, Buying Systems Coordinator

Related Documents:

#### Oracle iProc ENHT Online Ordering System

Open the application 'Internet Explorer' by double clicking the icon with your mouse.



Type the following web address into the address bar:

<http://nww.sharedfinancialservices.nhs.uk/oraapps.html>

And hit the enter key. Once the Oracle Homepage has loaded up — click on the 'Oracle Logon South West button to login.

**ORACLE LOGON SOUTH WEST**

This will take you to the Oracle Login Page below:

**ORACLE** E-Business Suite

#### Login

Username

Password

Enter your Username and password and click the login button. Your User name will be RWH your forename initial and your surname. E.G. Joe Bloggs would logon as RWHJBLOGGS

If you forget your password or username use the 'Forgotten your username?' or 'Forgotten your password?' links at:-

<http://nww.sharedfinancialservices.nhs.uk/oraapps.html>

Once you have logged in, you will see a new page listing your Oracle responsibilities. In order to create a requisition you will need to click on: **NHS\_RWH\_IPROC\_GLOBAL**

This will load a new page and allow you access to the iProcurement Home Page. Click on the link and you will be redirected to the iProcurement Home Page

Navigate

[NHS\\_RWH\\_DISCO\\_USER](#)  
[NHS\\_RWH\\_IPROC\\_GLOBAL](#)  
[NHS\\_RWH\\_NON\\_PO\\_APPROVAL](#)  
[NHS\\_RWH\\_PAYABLES\\_HELPDESK](#)  
[NHS\\_RWH\\_PAYABLES\\_INQUIRY](#)  
[NHS\\_RWH\\_PO\\_SUMMARY](#)  
[NHS\\_RWH\\_PURCHASING\\_BUYER](#)  
[NHS\\_RWH\\_RECEIPTOR](#)

Navigate

**NHS\_RWH\_IPROC\_GLOBAL**

**NHS\_RWH\_IPROC\_GLOBAL**

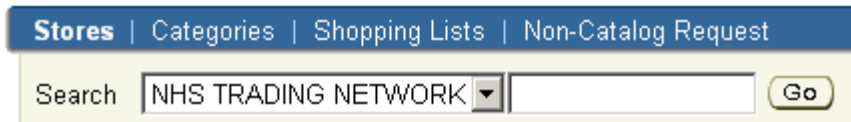
[iProcurement Home Page](#)

This will take you into Oracle iProcurement.

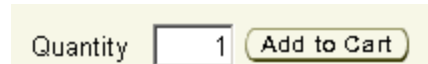
**ORACLE** iProcurement

## To create a non-stock catalogue item Requisition:

First find the item/s you would like by entering the item number or a brief description into the text box and then click the 'Go' button.



And hit the enter key. This will load a list of suggestions which you can browse through using the 'Previous' and 'Next' buttons till you find the correct item. Once you've found the item you wish to order, type in the quantity you wish to order and click 'add to cart'.



On the left of the page a button to 'View Cart and Checkout' will appear. Click this to go to your shopping cart.

[View Cart and Checkout](#)

You will then have the option to edit the item quantity and to 'Save' the order till later or to complete the order by clicking on 'Checkout'.

[Save](#) [Checkout](#)



This will take you to stage 1 of the checkout process. You will have the option to change your need by date and delivery location. It is recommended that you leave the buyer and requester as the default.

You are also able to check that the order is charged against the correct cost centre by clicking on the charge account.

Taxable Yes  
Tax Code Standard  
Charge Account [RWHN.172150.7350.00000.00000.000000](#)

Throughout the checkout process you can 'Cancel' or 'Save' your order, or 'Edit' the product lines you've ordered.

[Cancel](#) [Save](#) [Submit](#) [Edit Lines](#) [Step 1 of 3](#) [Next](#)

Click Next to proceed to stage 2. Here you have the opportunity to check that your order will be sent to the correct Approver to authorise—usually your Line Manager.

[Change First Approver](#)  
[Approver Name](#)

You can also add notes to Justify the order or to add information for the buyer. If necessary you can also upload attached files by clicking the 'Add Attachments' button.



Click 'Next' to proceed to the final stage of the order. This gives you the chance to review your order and confirm that all details are correct.

### Attachments

[Add Attachments](#)

Once you are happy click on 'Submit' to place your order.

[Submit](#)

Remember that once your order has been approved—if it has not been received by R&D it is your responsibility to 'Receive' the order online so that the supplier's invoice will be cleared for payment.

## To make a Non-catalogue item Requisition:

First you will need to find the item category. To do this click on 'Categories' in the blue bar at the top of your screen. [Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#)

You will see a list of categories displayed below. Click on the category that is most suitable for your item, and it will then take you to a menu of sub-categories. Again click on the sub-category that is most suitable for the item you wish to order, and you will be taken to a third further sub-category. Choose the final category that is most suitable for your order and make a note of the 3 digit code.

E.G. XCB for Vehicle Hire Cars • [XCB VEHICLE HIRE CARS](#)

Then click on 'Non-Catalog Request' in the blue bar.

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#)

You will then be able to select the item type from the drop down bar and enter the item description, the quantity you require and the price. The default currency is GBP £. To enter the category you will need the 3 digit code you looked up earlier. Enter the code and click on the torch to look up the correct category. Enter the unit of measure E.G. Day, Litre, Each, Box etc and again click on the torch to confirm the correct entry. If you do not know the price use £0.01 as default.

Item Type	<input type="text" value="Goods billed by quantity"/>	<input type="checkbox"/>	New Supplier
* Item Description	<input type="text"/>	Supplier Name	<input type="text"/>
* Category	<input type="text"/>	Site	<input type="text"/>
* Quantity	<input type="text"/>	Contact Name	<input type="text"/>
* Unit of Measure	<input type="text" value="EACH"/>	Phone	<input type="text"/>
* Unit Price	<input type="text"/>	Supplier Item	<input type="text"/>
* Currency	<input type="text" value="GBP"/>		

You then need to confirm the supplier details. Enter part of the supplier name and click on the torch to look up the correct supplier. If you cannot find them then tick the box for 'New Supplier'. The site should be filled in automatically. Then enter a **Contact Name**, **Phone**, and **Supplier Item** before clicking 'Add to Cart'.

On the left of the page a button to 'View Cart and Checkout' will appear. Click this to go to your shopping cart.

You will then have the option to edit the item quantity and to 'Save' the order till later or to complete the order by clicking on 'Checkout'.

This will take you into the checkout process, complete stages 1-3 as you would for a stock requisition once all 3 stages are complete you can submit your order for approval.

**Remember:** that once your order has been approved — if it has not been received by R&D it is your responsibility to 'Receive' the order online so that the supplier's invoice will be cleared for payment.

## Receiving an order

Once you have successfully placed an order and it has been approved, you may receive a notification requiring you to receive the goods in order to complete the transaction. To do this click on the 'Receiving' tab at the top right of the page.

Shop Requisitions **Receiving**

You will see a list of recent orders you have placed listed beneath 'Requisitions to Receive'. Click on the order that you wish to complete.

### Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted.

[Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
No results found.				

Alternatively if the order you wish to receive is not displayed, or you wish to receive an order on behalf of someone else, click on 'Receive Items' on the right of the page in the Receiving Process box. This will allow you to search for the order you wish to receive.

### Receiving Process

- Receive**  
Record receipt of the items you ordered, or receive on behalf of others.
- [Receive Items](#)

Requester

Include employees from all organizations

Requisition Number

Supplier

Order Number

Shipment Number

Items Due

(Enter at least one additional search criterion when selecting Items Due Any Time)

The form will default to your username and to orders within the last 7 days, you can edit these as necessary and search for the order by Req No., Supplier, Orde No. or Shipment No. Search results will be displayed below.

[Select All](#) | [Select None](#)

Select	Requisition	Description	Need By	Receipt Quantity Unit	Ordered	Received	Supplier	Order Type	Order Number	Shipment Number
<input type="checkbox"/>	30523	930435050 - CORTICAL SCREW DIA 3.5 X 50	22-Apr-2008 00:00:00	10 EACH	10	0	DEPUY INTERNATIONAL LTD	Purchase	76053041	
<input type="checkbox"/>	30523	1401214 - 3.2MMX14IN GUIDE PIN	22-Apr-2008 00:00:00	6 EACH	6	0	DEPUY INTERNATIONAL LTD	Purchase	76053041	

TIP Use the Previous/Next navigation tool to make selections across multiple pages

[Step 1 of 3](#)

Once you can view the order you wish to receive, the items ordered will be listed as in Picture #29. To select a line, click the select box and check that the quantity you've received is correct. Once you are satisfied, click on 'Next' to enter the 3 step Receiving process.

\* Receipt Date

(example: 23-Sep-2008 19:45:00)

Waybill

Packing Slip

Receipt Comments

Step 2 requests you to confirm the delivery information, by entering Waybill and Packing Slip reference numbers if available, as well as the receipt date and any comments regarding the delivery. Click 'Next' to proceed to the final step of the Receiving process.

Here you can review the received items and once satisfied, click on 'Submit' to complete the receipt.

### Receive Items: Review and Submit

[Step 3 of 3](#)

#### Receipt Information

Receipt Date **08-Oct-2008 13:25:39**

Receipt Comments

#### Received Item Details

Requisition	Description	Receipt Quantity Unit	Waybill	Packing Slip	Item Comments	Supplier
30523	930435050 - CORTICAL SCREW DIA 3.5 X 50	10 EACH				DEPUY INTERNATIONAL LTD

[Step 3 of 3](#)

NB: You can also 'Express Receive' the items ordered at any time through this process. However this will not allow you to enter any delivery information or to part receive the order.

## Using Favourites

Favourites can be a very useful way of speeding up the ordering process, especially if you tend to only order specific products on a regular basis. To see your favourites list simply click on the 'Shopping Lists' Tab at the top left of the page.

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#)

This will display a list of all items that you have added to your favourites. You can add both Catalogue and Non-Catalogue products to your favourites list.

To add a Catalogue item—simply search for the product (as detailed on page 2) when you have found the item you wish to add, simply click on the 'Add to Favourites' button.

**JACKET LONG LINE POLYESTER BLACK SIZE 08**

Category: <b>BAB COATS MENS</b>	Supplier: <b>BOYD COOPER LTD</b>	Supplier Site: <b>DERBY</b>
Supplier Item: <b>FJ555 08 BLACK</b>	Trust Part Number:	CPA Reference: <b>76015226</b>
Price: <b>47 GBP</b>	Unit: <b>EACH</b>	

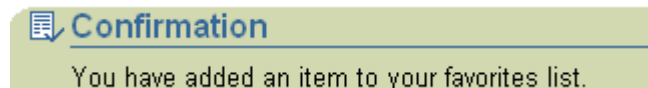
Quantity

To add a Non-Catalogue item to your favourites list, simply create a Non-Catalogue Request in the normal way (as detailed on page 3) and click on the 'Add to Favourites' button.

**Non-Catalog Request**  
\* Indicates required field

Item Type	Goods billed by quantity	<input type="button" value="Clear All"/>	<input type="button" value="Add to Cart"/>	<input type="button" value="Add to Favorites"/>
* Item Description	<input type="text"/>	<input type="checkbox"/> New Supplier	<input type="text"/>	<input type="text"/>
* Category	<input type="text"/>	Supplier Name	<input type="text"/>	<input type="text"/>
* Quantity	<input type="text"/>	Site	<input type="text"/>	<input type="text"/>
* Unit of Measure	EACH	Contact Name	<input type="text"/>	<input type="text"/>
* Unit Price	<input type="text"/>	Phone	<input type="text"/>	<input type="text"/>
* Currency	GBP	Supplier Item	<input type="text"/>	<input type="text"/>

Once you have successfully added an item to your favourites you will see the following confirmation message:



### **Useful Information Regarding Favourites & Catalogue / Non-Catalogue Requests:**

If you request a Catalogue Item, once approved your order will be sent directly to the supplier. This means that where possible you should use Catalogue Items as they will be processed quicker.

The Catalogue is constantly being updated, so items that you have originally created as Non-Catalogue Requests, may eventually be added to the catalogue. If you are notified of this, you should remove the item from your favourites list, by clicking on the 'Delete From Favourites' button.

**JACKET LONG LINE POLYESTER BLACK SIZE 08**

Category: <b>BAB COATS MENS</b>	Supplier: <b>BOYD COOPER LTD</b>	Supplier Site: <b>DERBY</b>
Supplier Item: <b>FJ555 08 BLACK</b>	Trust Part Number:	CPA Reference: <b>76015226</b>
Price: <b>47 GBP</b>	Unit: <b>EACH</b>	

Quantity

Once you have removed the Non-Catalogue item, you should then add the Catalogue item to your favourites to replace it — as detailed above.

If you have an item you wish to be added to the catalogue—please email all relevant details to Mark Lainchbury at: [mark.lainchbury@hsmc.nhs.uk](mailto:mark.lainchbury@hsmc.nhs.uk)