



## **Finance Transformer**

### **Purchase to Pay**

#### **Limit Requisition File Attachments to Header Level**

## Introduction

From 29 April, files can only be attached to a requisition at header level. This enhancement streamlines the approval process for requisitions by ensuring that supporting file attachments are always visible to a signatory on the approval email, therefore avoiding duplicate rounds of queries, or approvers separately logging-in to MyFinance at every stage.

This guide explains how to use this new functionality. It assumes you have the iProcurement responsibility within MyFinance and are a key member of the project code you wish to charge (if you are not a key member, please liaise with your Departmental Administrator who can request you are given access if appropriate).

## Attaching Files to Requisitions

1. Go to your iProcurement responsibility in MyFinance and select **Non-Catalog** request. Enter the requisition detail using the standard process and add to the shopping cart. **Click View Cart and Checkout:**

ORACLE iProcurement

Shop Requisitions Receipt of Goods

Stores Non-Catalog Request

Non-Catalog Request

\* Indicates required field

\* Item Type Goods billed by quantity

\* Item Description Laboratory Coats

\* Category Medical & Laboratory cot

\* Quantity 10

\* Unit of Measure Each

\* Unit Price 50

\* Currency GBP

\* Supplier Name ANACHEM LTD

\* Site NON-CATALOG REQ

PO Email Address

Supplier Item

Shopping Cart

Your cart contains 1 line.

Recently Added Lines

Laboratory Coats 10 Each

View Cart and Checkout

2. Enter the **Product Category** and the **Project** code information. Click **Edit**:

Shopping Cart

\* Requisition Description Laboratory clothing

Justification

\* Need-By Date 26-Apr-2020 00:00:00

\* Deliver-To Location C13 - AP Delivery

Tax

Default Taxation Country GB

Intended Use

\* Product Category GOODS

Additional Header Information

This is a retrospective purchase No

Bill To Location C13 - AP Invoice Address

PO Administrator Morrissey, Ms Eleanor (Eleanor)

Hide Delivery and Billing

Delivery

\* Requester Morrissey, Ms Eleanor (E)

Billing

Project 501903

Task 100

Award 156780

Expenditure type ZZ Lab Consumables

Expenditure Item Date 24-Apr-2020

VAT TIPS

TIP It is an offence to make an incorrect VAT declaration. To qualify for VAT zero rating under the medical exemption criteria the purchase must be wholly or mainly used for MEDICAL research, training (teaching), diagnosis or treatment

TIP Select the Intended Use of Medical Research to apply VAT zero rating under the MEDICAL EXEMPTION criteria. Be aware that many items are not eligible for zero rating in any circumstances e.g. Furniture, Stationery, Toner

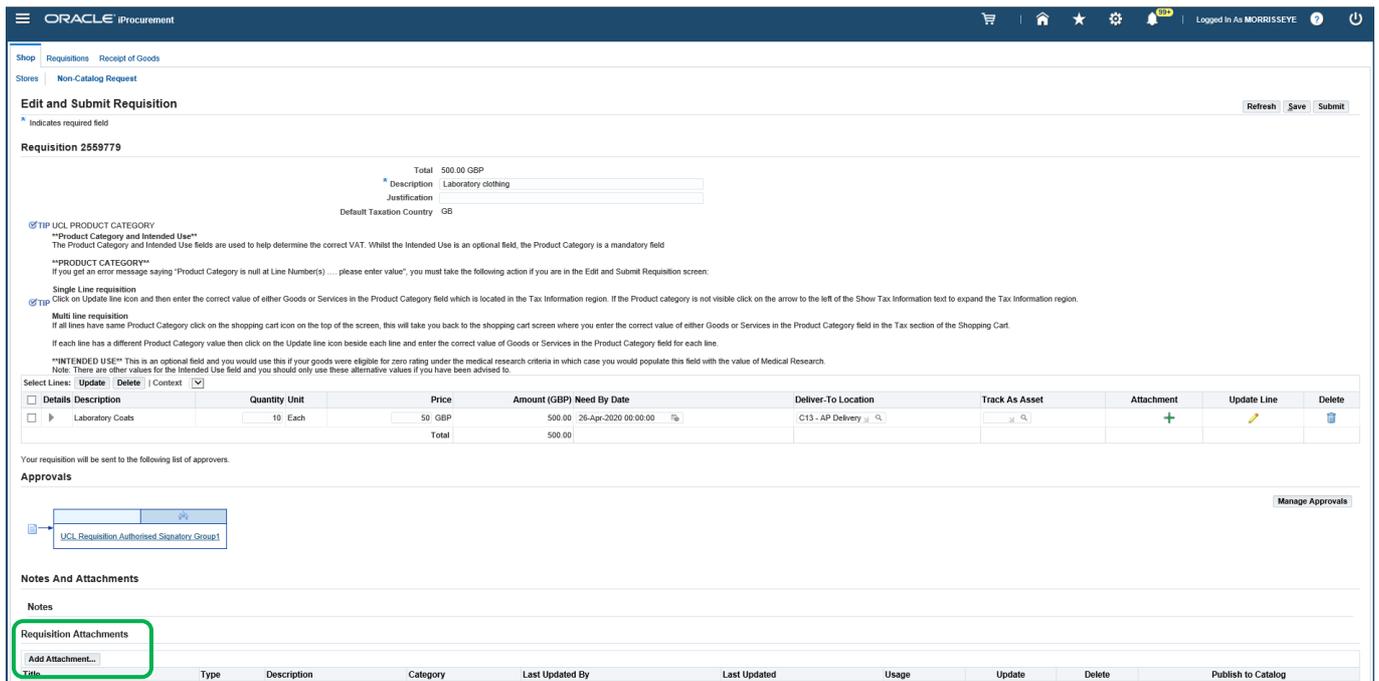
TIP Cartridges, Batteries, film etc. (FOR MORE DETAILS SEE THE VAT GUIDANCE INFORMATION ON THE FINANCE WEBSITE)

TIP The system will automatically apply tax codes based upon the expenditure type and the location of the supplier

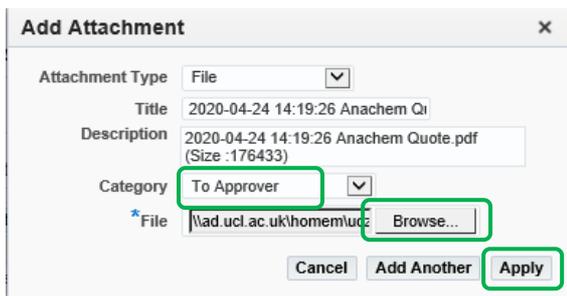
Line	Item Description	Unit	Quantity	Price	Amount (GBP)	Track As Asset	Delete
1	Laboratory Coats	Each	10	50 GBP	500.00		
Total					500.00		

Continue Shopping Edit Save Submit

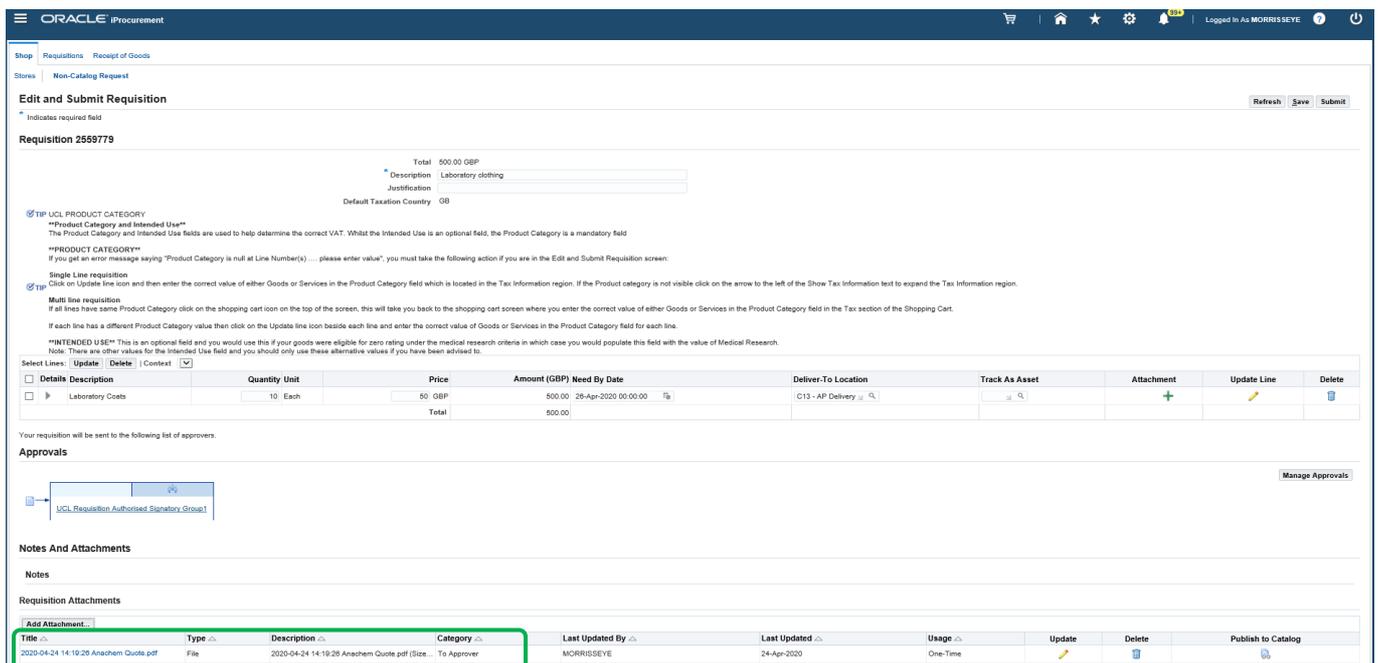
3. File attachments should be added at the bottom of the screen at the header level. Click **Add Attachment**:



4. Choose the person you wish to view the attachment. If you wish for the approver to view the attachment, select **To Approver**. Please note that when raising requisitions over £50k, the **To Approver** option must be chosen at all times. Click **Browse** to find file and then **Apply**:



5. The file is then attached to the requisition and it can be submitted:



6. The **Attachment** field on the line level has been restricted to **text notes only** to the supplier. This is used to add further notes on a requisition if applicable. **It cannot be used for file attachments.**

**Oracle iProcurement**

Shop | Requisitions | Receipt of Goods

Stores | Non-Catalog Request

**Edit and Submit Requisition** Refresh Save Submit

Indicates required field

**Requisition 2559779**

Total: 500.00 GBP  
 Description: Laboratory clothing  
 Justification:  
 Default Taxation Country: GB

**TIP UCL PRODUCT CATEGORY**  
 \*\*Product Category and Intended Use\*\*  
 The Product Category and Intended Use fields are used to help determine the correct VAT. Whilst the Intended Use is an optional field, the Product Category is a mandatory field.  
 If you get an error message saying "Product Category is null at Line Number(s) .... please enter value", you must take the following action if you are in the Edit and Submit Requisition screen:  
 \*\*PRODUCT CATEGORY\*\*  
 If you get an error message saying "Product Category is null at Line Number(s) .... please enter value", you must take the following action if you are in the Edit and Submit Requisition screen:  
**Single Line requisition**  
 Click on Update line icon and then enter the correct value of either Goods or Services in the Product Category field which is located in the Tax Information region. If the Product category is not visible click on the arrow to the left of the Show Tax Information text to expand the Tax Information region.  
**Multi line requisition**  
 If all lines have same Product Category click on the shopping cart icon on the top of the screen, this will take you back to the shopping cart screen where you enter the correct value of either Goods or Services in the Product Category field in the Tax section of the Shopping Cart.  
 If each line has a different Product Category value then click on the Update line icon beside each line and enter the correct value of Goods or Services in the Product Category field for each line.  
 \*\*INTENDED USE\*\* This is an optional field and you would use this if your goods were eligible for zero rating under the medical research criteria in which case you would populate this field with the value of Medical Research.  
 Note: There are other values for the Intended Use field and you should only use these alternative values if you have been advised to.

Details	Description	Quantity	Unit	Price	Amount (GBP)	Need By Date	Deliver-To Location	Track As Asset	Attachment	Update Line	Delete
<input type="checkbox"/>	Laboratory Coats	10	Each	50 GBP	500.00	28-Apr-2020 00:00:00	C13 - AP Delivery		+		
<b>Total</b>					500.00						

**Add Attachment**

Attachment Type: **Short Text**

Title:

Description:

Category: **To Supplier**

\* Short Text:

Cancel Add Another Apply