Product category and Non Catalogue Requisition

**Single line Requisition charged to one project**

Complete Non Catalog Request screen and then click Add to Cart and then View Cart and Checkout. You will be taken to the shopping cart screen.

**Note:** Intended Use and Product category field has changed location in the Shopping cart screen.

- Enter value of either Goods or Services in Product category field (you must only use a value of either Goods or Service no other value should be selected).

- Optionally enter value in Intended use – pick value from LOV.
Enter Project, Task, Award, (PTA) in the Billing section.

Click Submit, Requisition is submitted for approval.

Click on Continue Shopping to exit this message.
Multi Line Non Catalog Requisition charged to one project

Complete Non Catalog Request screen and then click Add to Cart and then View Cart and Checkout. You will be taken to the shopping cart screen.

Note: In this example we have used different Purchasing Categories so the Expenditure Type shows as Multiple because the Purchasing Category is used to derive the Expenditure Type.

![Shopping Cart](image)

Enter PTA in billing section.

Click on Submit.
**Note:** The following error message appears because you did not put a value in the Product Category field in the Shopping Cart screen.

The Product Category is a mandatory field hence the reason for this error message. Click OK.

The cursor will be in the Product Category field where you must enter the value of either Goods or Services (Do not enter any other value).

![Shopping Cart Example](image)

Click Submit and the Requisition is submitted for approval.
Checking VAT on the requisition

You can check the VAT that will be charged on the Requisition by clicking on the Edit icon (see screen shot below) before submitting the requisition for approval.
After clicking on Edit icon the Edit and Submit Requisition screen is displayed.

You will need to scroll down the screen to get to the Tax Information section in the Edit and Submit Requisition screen.

In this example VAT of £33.87 will be charged.

To submit the Requisition for approval click on the Submit button in this screen and a message appears confirming the Requisition has been submitted.

Click on Continue shopping to exit this message.
**Splitting Cost of Requisition line between more than one project**

Complete Non Catalog Request screen and then click Add to Cart and then View Cart and Checkout. You will be taken to the shopping cart screen.

*Note:* The Expenditure Type field has already been populated based on the Purchasing Category used when the Requisition was created in the Non Catalog Requisition screen.
Use scroll bar on the right hand of the screen to scroll down the screen so you can see the Edit icon.

Click on Edit icon to enable you to split the cost of the line between the more than one PTA combination. The Edit and Submit Requisition screen will open.

Select the Update Line icon.

Update Line screen opens. Scroll down screen to get to Billing section.

Either

Enter 1st PTA combination and then click on the add another line icon.

Or

Click on add another line icon

You can add as many lines as you need depending on how many PTA combinations you want to split the costs against.
Note: If splitting costs which involved PTA from another department the maximum number of departments you can split across is 5.

Enter the PTA as necessary and split the cost by percentage, quantity or monetary value.

Note: However you split the cost, the percentage total must equal 100%.

Click on Apply and you are returned to the Edit and Submit requisition screen. You may need to scroll down the screen to see Apply link.

Note: We have not added the Product Category or Intended Use value and if you click on Submit you will get the following error message.

Note: Only the Product category is a mandatory field which is why the error message only references the Product category.
As this is a single line Requisition the simplest way to enter the Product Category and/or Intended Use is to click on the Update line icon.

Enter the value of either Goods or Services in the Product Category field. **Do not enter any other value in the Product category field.**

Optionally enter a value for Intended Use, use the LOV to select the value for Intended Use. **Intended Use is not a mandatory field.**

Scroll down the screen until the Apply icon is displayed and click on Apply.
To submit the Requisition for approval you can click on the Submit button in the Edit and Submit Requisition screen.

A message appears confirming the Requisition has been submitted.

Click on Continue Shopping to exit this message.
Product Category and Catalogue Requisition

**Single line Catalog Requisition charged to one project**

In this example we will select an item from UCL e-Market place and return to iProcurement.

Click on UCL eMarket place link on the Shop page.

Search for item in the UCL eMarket place (see section on search feature in UCL e-Market place for more information on this functionality) and add item to basket.

Click Checkout to return item to iProcurement.
(The following is same if you select an item from R S Components catalogue and return to iProcurement).

**Note:** you are now returned to the Edit and Submit Requisition screen.

To enter PTA for single line requisition click on Update line icon. You may need to scroll down the screen to see the fields where you enter PTA.

Enter PTA in relevant fields.

![Update Line](image)

Enter Product Category of either Goods or Services in the Product category field *(Do not enter any other value)*.

Optionally enter a value for Intended Use.

Click on Apply, you may need to scroll down the screen to see the Apply link.

**NOTE:** If you forgot to enter a value for the Product Category the following error message will appear in the Edit and Submit Requisition screen when the Requisition is submitted for approval.

![Error Message](image)
You will not be able to submit the requisition for approval until you enter a Product Category.

If you need to enter Product Category, Click on Update Line icon, to display the Product Category field and enter the value of either Goods or Services (Do not enter any other value).

Click Apply.

Submit the Requisition for approval. You no longer get an error message in the Edit and Submit Requisition screen.

A message appears confirming the Requisition has been submitted.

Click on Continue shopping to exit this message.
**Multi line Catalog Requisition charged to one project**

In this example we will select items from UCL eMarket place and return to iProcurement.

Click on UCL eMarket place link on the Shop page.

Search for items in the UCL eMarket place (see section on search feature in UCL eMarket place for more information on this functionality) and add items to basket.

Click on Checkout to return item(s) to iProcurement.
The easiest way to add the same PTA for all lines on a catalogue requisition is to tick the Select box next to each line and then click on the Update link.
The Requisition Information: Update Selected Line screen is now displayed.

Enter PTA in the Billing section.

Note: the Expenditure Type is already populated based on the Purchasing Category that has been mapped to the items selected from the UCL eMarketplace.

In the above example all items are stationery so have the same Expenditure Type, if different Purchasing Categories were used this field would have a value of Multiple.

Note: There is nowhere to add the Product category in this screen.

Click Apply to apply the PTA to all lines.

Click on Submit and you get error message that there is no Product category on all lines.
You can add the Product Category to each line individually by clicking on the Update Line icon although this is somewhat laborious if you are using the same Product Category for all lines.

If there is a different Product Category on each line you will have to update the Product Category for each line by clicking on the Update Line icon.

The easiest way to add the same Product Category to all lines for a multi-line Catalogue requisition is to click on the Shopping Cart icon at top of the screen.
This takes you back to the Shopping Cart where you can add the Product Category value which will apply to all lines.

You can also add a value for the Intended Use if necessary here.

Click the Submit button to Submit the requisition for approval and a confirmation message appears.

Click Continue Shopping to exit this message.