

## Electronic ordering using R12 iProcurement

For a number of years Oxford University has operated an integrated finance system for generating purchase orders for goods and services. The R12 iProcurement system enables users to raise requisitions electronically, enables principal investigators (PI) or supervisors to approve purchases electronically and enables suppliers to receive purchase orders electronically.

Users of the iProcurement system can order direct from a marketplace of suppliers such as Fisher Scientific, VWR, Thorlabs, Office Depot and many more by simply searching the catalogue for goods on the system and adding to cart, just like other internet based suppliers.

Users can also punch-out to some supplier websites such as RS Components, Insight (for IT) and OneCall (the umbrella group for Farnell, CPC and Element 14) browse the supplier website, add anything they need to their carts and transfer the cart back into the iProcurement system. **This system removes the need to get quotations or price verifications** from these suppliers as they are **preferred suppliers** and the University has negotiated prices and discounts with them.

The ordering system also has a non-catalogue request function for ordering goods and services that are not on electronically held catalogues or linked supplier websites, however suppliers need to be **approved suppliers** and requisitions need attached copies of quotes and price verifications. (Note that approval of a new supplier can take several weeks).

Electronic ordering allows users to find the most cost effective suppliers of goods, all helping to stretch budgets further. Approval of requisitions is via e-mail so there is no need for the PI, supervisor or budget holder to be in the office (or the UK for that matter) and no need for penned signatures. Quotations, contracts and other important documents are attached to requisitions and therefore available for future reference.

However, in addition to the electronic R12 iProcurement system, the Department of Materials still operates the older system of paper requisitioning. Each time someone submits a paper requisition the finance team have to type it into the electronic system. This duplication of work is inefficient and wastes time, money and effort, not to mention resources. Currently **50% of orders still use the older inefficient paper system** rather than the electronic iProcurement system.

With this in mind, **the finance team would like to see the requisition system move entirely to iProcurement (electronic) ordering by the end of this financial year (31st July 2017).**

To access iProcurement you simply need to complete a 20 minute online training course to become a "Shopper" and then apply for access to the system. (see details below).

Being a shopper allows you to see the whole process, access old orders, check the progress of existing orders, save regularly ordered items to your favourites and much more besides.

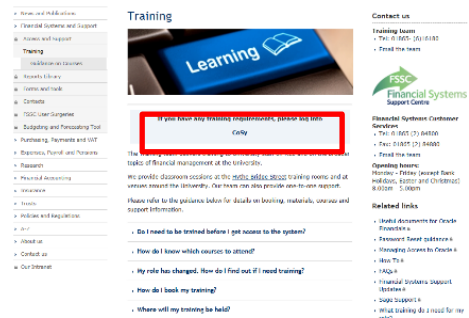
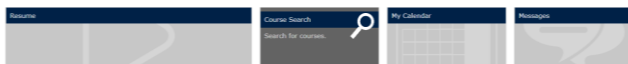
PIs, supervisors and budget holders can approve orders via an email sent to them rather than being chased to physically sign a piece of paper. need to do the training course, although that would also be beneficial thus allowing you to have an overview of all orders using their budget cost code.

# Get started with Electronic Ordering via R12 iProcurement

To access training visit

<https://www1.admin.ox.ac.uk/finance/support/training/>

- Click on the CoSY link (red outline in image) and sign in using your university SSO username and password.
- In the CoSY training opening page click on Course Search



- Enter the word “Shopper” in the Course/title of the Course Search area and click search

- From the list of search results, choose the “Shopper” course by clicking on the green arrow. You will be sent a link to give access to the training. You can also take the “Shopping Optional Extras” course if you wish. If you are a PI or supervisor and have responsibility for approving carts you can complete the “Reviewer” and “Reviewer – Formerly Shopper” courses.

Search results

Course	Type	Action
Buyer	E-learning	
Preparer - Formerly Shopper	E-learning	
Reviewer	E-learning	
Reviewer - Formerly Shopper	E-learning	
Shopper	E-learning	
Shopping Optional Extras	E-learning	
XL Connect	E-learning	

If you would like further assistance then please call Kiri Holmes on 73706 who will happily walk you through the ordering process and assist you to enter your first orders.

The intention is to incorporate iProcurement training into the induction training for all new-starters.

This is still a work in progress, and input from members of the department is vital to help get this project up and running. So please feel free to contact the finance team with any queries and questions you may have so this can be a team effort for the whole department. We appreciate this is a substantial change for some groups and we are happy assist in the transition in any way we can.