

Estates & Facilities

Internal Trade User Guide

23/02/2017

	Revis	ion History
Revision No. Date		Description of Change
1.0	22/02/2017	Document Created
2.0	23/02/2017	Template & Version Number Applied

1. Login to iProcurement

2. If you have the catalogue number of the item you are ordering, search the catalogue number in the search field. Otherwise, search the full catalogue of the supplier via "Advanced Search".

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Enter "TCD Estates and Facilities" and Click "Go".

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3. You will be presented with Estates and Facilities catalogue. Choose the correct catalogue item. More detailed information around the catalogue item options can be viewed at Appendix 1. Enter the agreed QTY or Amount and Click on "Add to Cart"



Now you can see the item you selected is in your basket.

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- 4. If you wish to add more items, enter the appropriate QTY or Amount from the list and repeat Step 3. Otherwise, click "View Cart and Checkout"
- 5. Once you are happy with your basket, click "Checkout"

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- 6. At Check-out please ensure that the following information is provided:
 - <u>Requisition Description</u>: In order to allow you to recognise the order at a later stage it is necessary that a summary of the work is included here <u>to include the</u> <u>Estates and Facilities Request Number</u>. If the request number is not identified the requisition will be rejected.
 - <u>Requester</u>: Default to the preparer. Amend if required based on local hierarchies.
 - <u>Deliver to Location</u>: Default to the requester's location. Amend if required.
 - <u>Suggested Buyer</u>: POA in your area (e.g. Kim, Sena)
 - <u>Billing</u>: Enter Project POETA details if it is for a Research account.
 - <u>Edit Lines</u>: Click Edit Lines to review or amend General ledger charge account code .
 - Intended Use: Leave it blank. It is only applicable for orders from outside the EU.
 N.B. Expenditure type <u>MUST</u> be Internal Expenditure type. Full list of the internal expenditure types can be found at:

https://www.tcd.ie/financial-

services/coding/internal trade expense codes march 2016.pdf

7. Once all required information including correct charge account code is entered, click "Next"

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Shop Requisitions Recei	ving Shopping Car	rt Home Logout P	Cance! Save Submit Edit Lines Step 1 3 Next references Help Diagnostics Copyright (c) 2006, Oracle. All rights reserved.

- 8. Check-out Further Information:
 - <u>Approvals:</u> shows who will be approving this order based on the local cost centre hierarchy.
 - <u>Notes:</u>
 - Justification (optional) a note to your approver to justify your purchase. It will not appear on your PO.
 - Note To Buyer (optional): a note to your POA regarding your purchase. It will not appear on your PO.
 - Note To Supplier: Any additional information that you wish to have it on your
 PO. It will be on your PO and visible for the supplier. <u>The Estates and Facilities</u> request number should be included here.
 - Attachment: any additional documents or attachments regarding this order. (optional)

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- 9. When you are happy that all of the information entered is correct, Click "Submit"
- 10. Review all information entered. You can check further information by clicking "+Show"

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Please ensure to check "Billing Information" for correct internal expense code (expenditure type).

If not, please go back to step 6 and amend.

Internal Trade User Guide

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11. Once submitted, you will receive a confirmation with a PR number.



- 12. Once your approver approves the requisition, a purchase order (PO) number will be created by the system and will automatically be emailed to Estates and Facilities.
- 13. Once received by Estates and Facilities, the PO details will be checked. If all is in order work will proceed in accordance with details provided by the Estates and Facilities manager. If all is not in order the PO will be queried and relevant updates requested.

N.B. Internal trade orders will be automatically paid the day after a PO is receipted. Please ensure to receipt the PO once the good(s) or service(s) has been delivered. Appendix 1: Details to assist with choosing the correct Estates and Facilities Catalogue Item.

Insurance - Recoupment of various insurance charges	Insurance Services and fees relating to insurance costs being borne by College departments.
Parking Services	VIP Parking Charges and/or TBSI Parking Deductions being met by a College department.
PS10 Move Management	PS10 Logistical Services; Cost of moves within and between sites being met by a College department.
PS08 Minor Improvements	PS08 Technical Services, Alterations and Additions managed by the Facilities and Services team that are being funded by College departments.
CP01 Small Projects Management	CP01 Project <€50,000.00. Costs and Funding Transfers for small projects being managed by the capital projects team where costs are being met wholly or partly by a College department. To include signage.
CP02 Capital Building Project Management	CP02 Project >€50,000.00. Costs and Funding Transfers for large projects being managed by the capital projects team where costs are being met wholly or partly by a College department.
PS02 Events	PS02 Costs relating to the support of all events on campus: attendants, security, grounds, cleaning, logistics and any other services necessary where those costs are being met by a College department.
PS03 Internal Cleaning	PS03 Cleaning Services costs that are being met by a College department.
CS13 Waste Management	CS13 Cost of Waste Management and recycling services including ad hoc skips being met by a College department.
CS06 Mail Services	CS06 Cost of Mail Services including large mail shots being met by a College department.
Paper Hand towels, Z-folds, 3000p/box, 2 Boxes	Paper Disposables – stock item. Where cost is being met by a College department.
Z Fold Paper Towels, 4000	Paper Disposables – stock item. Where cost is being met by a College department.