



# Estates & Facilities

## Internal Trade User Guide

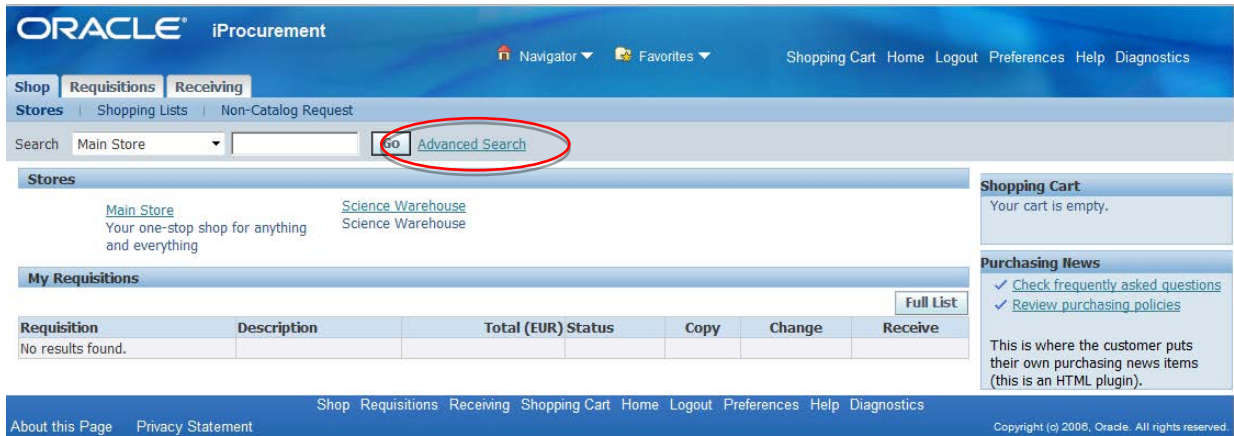
23/02/2017

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

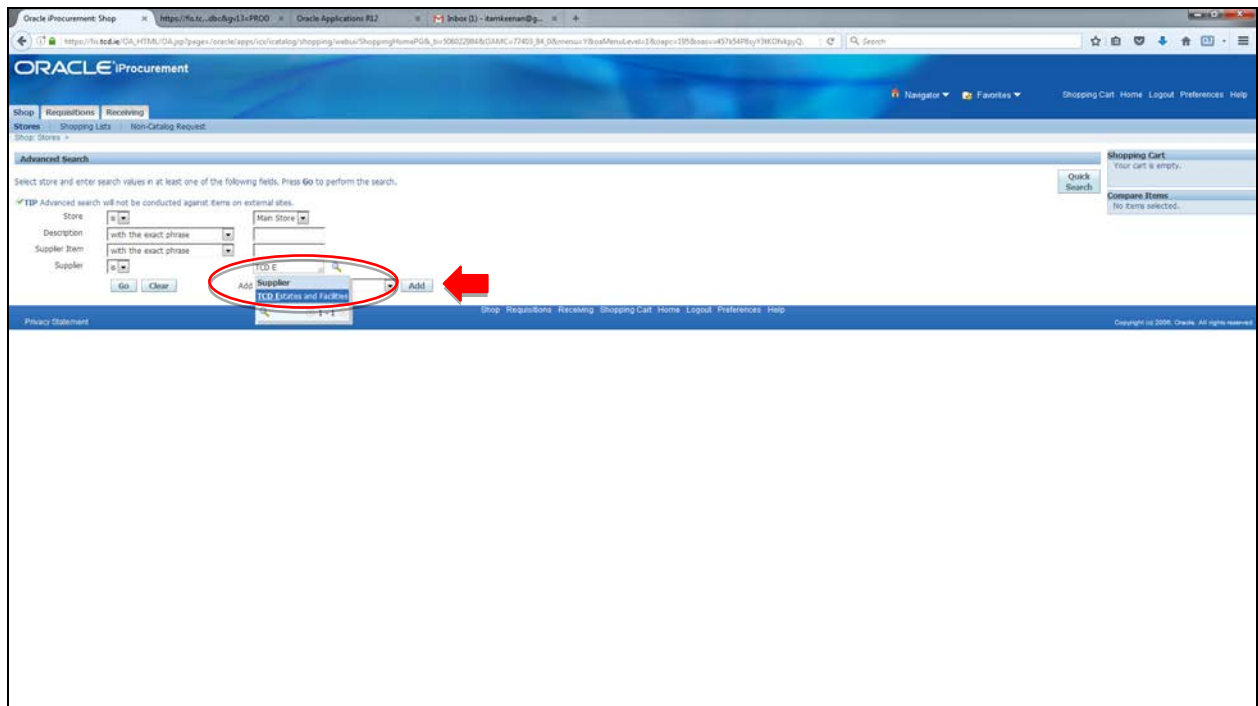
# Internal Trade User Guide

## 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”.



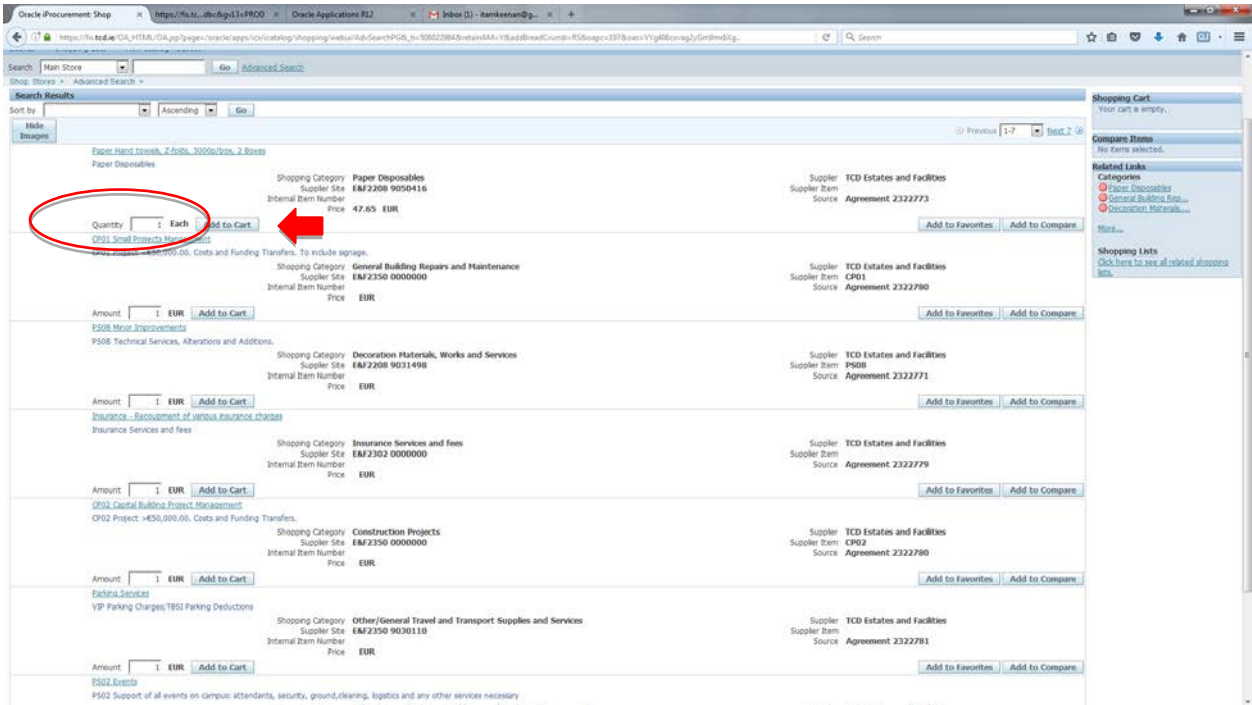
Enter “TCD Estates and Facilities” and Click “Go”.



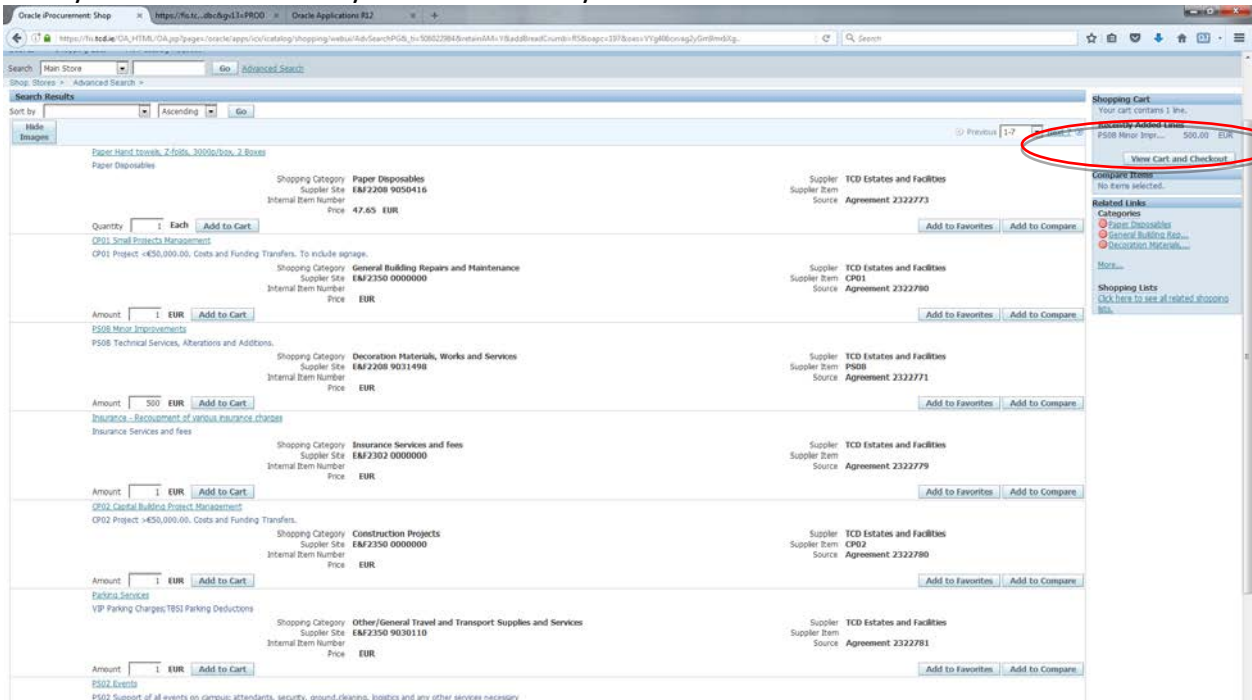
**Note: all internal suppliers' names begin with “TCD”**

## Internal Trade User Guide

- 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”

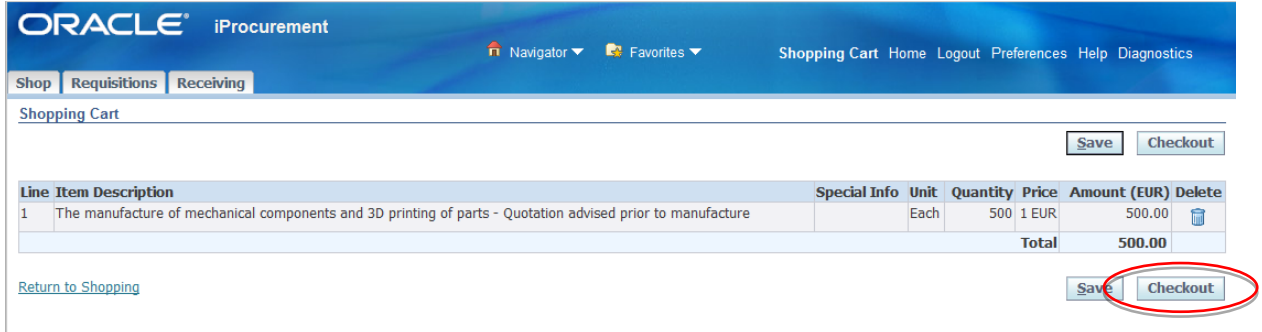


Now you can see the item you selected is in your basket.



## Internal Trade User Guide

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”



6. At Check-out please ensure that the following information is provided:
  - **Requisition Description:** 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 **to include the Estates and Facilities Request Number**. If the request number is not identified the requisition will be rejected.
  - **Requester:** Default to the preparer. Amend if required based on local hierarchies.
  - **Deliver to Location:** Default to the requester’s location. Amend if required.
  - **Suggested Buyer:** POA in your area (e.g. Kim, Sena)
  - **Billing:** Enter Project POETA details if it is for a Research account.
  - **Edit Lines:** 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 MUST 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](https://www.tcd.ie/financial-services/coding/internal%20trade%20expense%20codes%20march%202016.pdf)**

## Internal Trade User Guide

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

ORACLE® iProcurement

Navigator Favorites Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving

Requisition Information Approvals Review And Submit

Checkout: Requisition Information

\* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

\* Requisition Description 3D printing for Project 123 Feb 2016

Chemical requisitions: Has a risk assessment been carried out?

Chemical requisitions: Does this chemical require a hazard licence?

Requisitions over €5,000: Have 3 quotes been obtained?

Delivery Billing

\* Need-By Date 25-Feb-2016 00:00:00

\* Requester Kim, Sena

\* Deliver-To Location 5 COLLEGE GREEN 2.02

\* Suggested Buyer Kim, Sena

Project

Task

Award

Expenditure Type

Expenditure Organization

Expenditure Item Date

GL Date 23-Feb-2016

Intended Use

Cancel Save Submit Edit Lines Step 1 of 3 Next

About this Page Privacy Statement Shop Requisitions Receiving Shopping Cart Home Logout Preferences Help Diagnostics Copyright (c) 2006, Oracle. All rights reserved.

- Check-out Further Information:

- Approvals: shows who will be approving this order based on the local cost centre hierarchy.
- Notes:
  - 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. **The Estates and Facilities request number should be included here.**
- Attachment: any additional documents or attachments regarding this order. (optional)

# Internal Trade User Guide

ORACLE iProcurement

Shop Requisitions Receiving

Requisition Information Approvals Review And Submit

Checkout: Approvals and Notes

Your requisition will be sent to the following list of approvers.

Save Submit Back Step 2 of 3 Next

Approvals

Manage Approvals

Notes

Justification

Note To Buyer

Note To Supplier

Attachments

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Save Submit Back Step 2 of 3 Next

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"

ORACLE iProcurement

Shop Requisitions Receiving

Requisition Information Approvals Review And Submit

Checkout: Review and Submit Requisition

Save Printable Page Back Step 3 of 3 Submit

Requisition 1171272: Total 500.00 EUR

Created By **Kim, Sena** Non-Recoverable Tax **0.00**  
 Creation Date **23-Feb-2016 10:31:05** Recoverable Tax **0.00**  
 Description **3D printing for Project 123 Feb 2016** Approval Total **500.00**  
 Justification

Requisition Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Lines

Details	Line	Description	Cost Center	Unit	Quantity	Price	Amount (EUR)	Attachments	Recoverable Tax (EUR)	Non Recoverable Tax (EUR)	Approval Amount (EUR)
Show	1	The manufacture of mechanical components and 3D printing of parts - Quotation advised prior to manufacture	2000	Each	500	1 EUR	500.00		0.00	0.00	500.00
							<b>Total</b>	<b>500.00</b>			

Save Printable Page Back Step 3 of 3 Submit

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

Requisition 1171272: Total 500.00 EUR											
Created By <b>Kim, Sena</b>						Non-Recoverable Tax <b>0.00</b>					
Creation Date <b>23-Feb-2016 10:31:05</b>						Recoverable Tax <b>0.00</b>					
Description <b>3D printing for Project 123 Feb 2016</b>						Approval Total <b>500.00</b>					
Justification											
Requisition Attachments											
Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog		
No results found.											
Lines											
Details	Line	Description	Cost Center	Unit	Quantity	Price	Amount (EUR)	Attachments	Recoverable Tax (EUR)	Non Recoverable Tax (EUR)	Approval Amount (EUR)
<input type="checkbox"/> Hide	1	The manufacture of mechanical components and 3D printing of parts - Quotation advised prior to manufacture	2000	Each	500	1 EUR	500.00		0.00	0.00	500.00
Requester <b>Kim, Sena</b>						Deliver-To Location <b>5 COLLEGE GREEN 2.02</b>					
Need-By Date <b>25-Feb-2016 00:00:00</b>						Destination Type <b>Expense</b>					
Item Number						Supplier <b>TCD MECHANICAL ENGINEERING</b>					
Category Description <b>Mechanical Components/Spare Parts</b>						Supplier Site <b>TCD MECH ENG</b>					
P-Card Used <b>No</b>						Supplier Contact					
						Contact Phone					
						Supplier Item					
Billing Information											
Charge Account	Project Number	Task Number	Award Number	Expenditure Type	Expenditure Organization	Expenditure Date	Item	Contract Percent	Contract ID	Contract ID	
10-2000-9070003-310000000	52800-							100			
<b>Total</b>							<b>500.00</b>				

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

The screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with 'ORACLE iProcurement', 'Navigator', 'Favorites', 'Shopping Cart', 'Home', 'Logout', 'Preferences', and 'Diagnostics'. Below this is a breadcrumb trail: 'Shop > Requisitions > Receiving'. The main content area displays a 'Confirmation' message: 'Requisition 1171272 has been submitted to TO\_B.Buyer2 for approval.' It also provides instructions: 'To check on this requisition's status, click on the Requisitions tab or look in My Requisitions on the Shop page.' A 'Continue Shopping' button is located at the bottom right of the confirmation area. The footer contains 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

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.**

## Internal Trade User Guide

### 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.