

## New Product Request Form (buyer only)

Issue Date	Review Date	Version
September 2020	September 2025	1

### Purpose

Allow buyers to request new items added to the online catalogue in a standardised manner. Automate the process as much as possible for the helpdesk / data analyst team

### Who should read this document?

Buyers, eProc Helpdesk, Data Analysts – within Procurement

### Key Messages

The SOP is designed to give a written guide for both of the departments involved in the New Product Request (NPR) Buyer Only process.

Detailing how the automation side works, and who owns which stage of the process flow.

Core accountabilities		
Owner	Senior Data Analyst Procurement	
Review	Head of Supply Chain and e-Procurement	
Ratification	Director of Finance & Finance Senior Management Team Meeting	
Dissemination (Raising Awareness)	Head of Supply Chain and e-Procurement	
Compliance	Information Governance	
Links to other policies and procedures		
Version History		
1	September 2020	Ratified by Head of Supply Chain on behalf of Director of Finance and published Trust-wide

*The Trust is committed to creating a fully inclusive and accessible service. Making equality and diversity an integral part of the business will enable us to enhance the services we deliver and better meet the needs of patients and staff. We will treat people with dignity and respect, promote equality and diversity and eliminate all forms of discrimination, regardless of (but not limited to) age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage/civil partnership and pregnancy/maternity.*

**An electronic version of this document is available on Trust Documents.  
Larger text, Braille and Audio versions can be made available upon request.**

Standard Operating Procedures are designed to promote consistency in delivery, to the required quality standards, across the Trust. They should be regarded as a key element of the training provision for staff to help them to deliver their roles and responsibilities.

<b>Section</b>	<b>Description</b>	<b>Page</b>
1	Introduction	4
2	Definitions	4
3	Regulatory Background	4
4	Key Duties	4
5	Procedure to Follow	4
6	Document Ratification Process	8
7	Dissemination and Implementation	9
8	Monitoring and Assurance	9
9	Reference Material	9
	<b>Appendices 01</b>	10

## Standard Operating Procedure (SOP)

### New Product Request Form (buyer only)

#### 1 Introduction

The SOP is designed for use within the procurement team only, covering the buyers, and the eProc helpdesk / Data analyst team

#### 2 Definitions

- NPRF (Buyer only) – New Product request Form (Buyer Only)

#### 3 Regulatory Background

#### 4 Key Duties

- Buyer – Raise form by completing all light blue (Mandatory) sections, and any dark blue / orange sections (Optional) and submit to the helpdesk using the automation button
- Helpdesk / Data Analyst– Enter CPA number for each item requested to be added. Using the automation button within the form allocate a log number and send email to the buyer. Convert file into up-loadable format and enter into online catalogue system

#### 5 Procedure to Follow

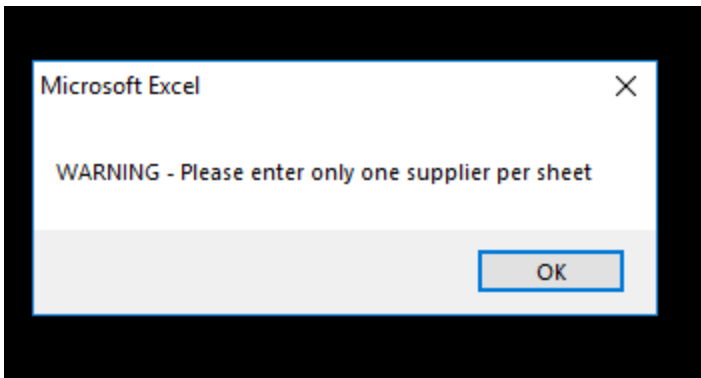
##### Stage 1: Buyer

The Buyer should complete the NPRF – Buyer ONLY file by completing the pale blue cells within the file. Each column has a header explanation which can be displayed by hovering the cursor over the header.

Some fields have drop down options to make selection easier. To open up the black section the buyer must enter their name (selected from a dropdown) and the supplier name (as stored in the catalogue system). They should complete this for each item they wish to add.

Buyer Name	Supplier (as spelt in Nexus)	ItemCode	Description	UOMCode	QOM	PurchasePrice	ContractNumber	ContractCode	PriceExpiryDate	DistributionFlag1	CategoryCode
Chris Stevens	Test										

Buyers can add up to 1000 new lines at any time, but they **MUST** be for the same supplier. If a different supplier is attempted to be added on the same sheet a warning message will be displayed as per the below.



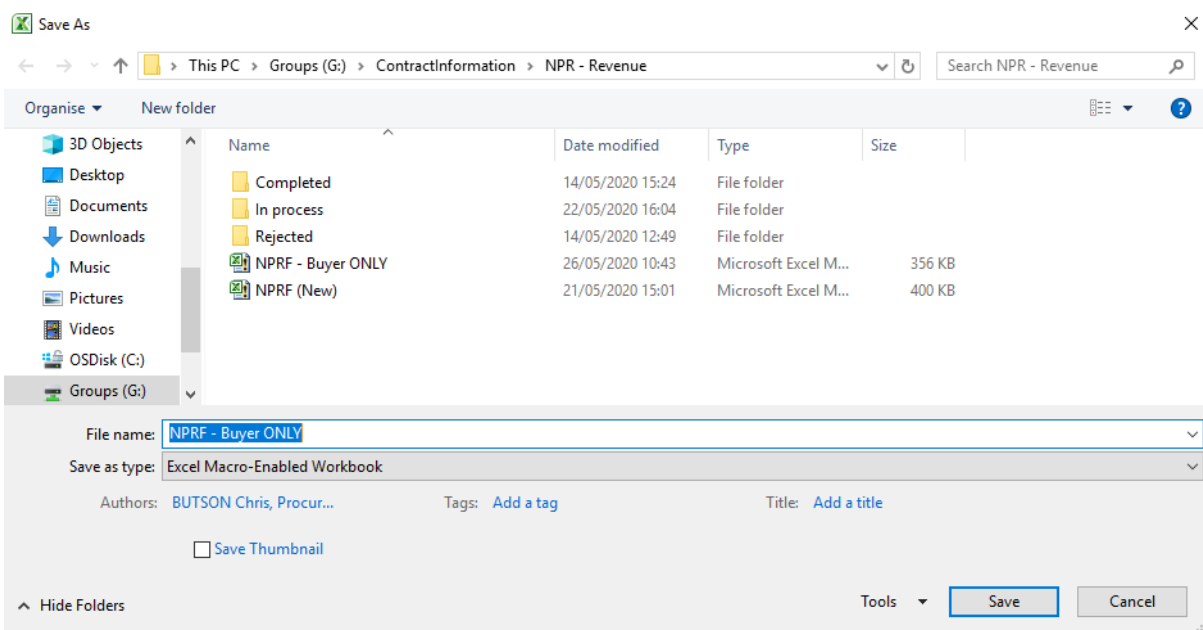
The dark blue columns are optional for the Buyer, and if additional information such as price breaks, start dates etc are required please inform the Helpdesk team separately.

The orange column (ContractCode) is for eProc use, unless the Buyer already knows the CPA, in which case they can enter it here.

Once the Buyer has completed the form (between 1 and 1000 items) they can click the "Save & Send" button at the right of the sheet.



This will provide the file explorer pop up where the Buyer can save and name the file in a location of their choice.




Once the file has been named and saved, it will automatically send an email to the eProc Helpdesk (**please note – Buyer must have outlook open and running on their computer**) with the file attached for actioning as shown below.

## New catalogue items

**[REDACTED]** (UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST)

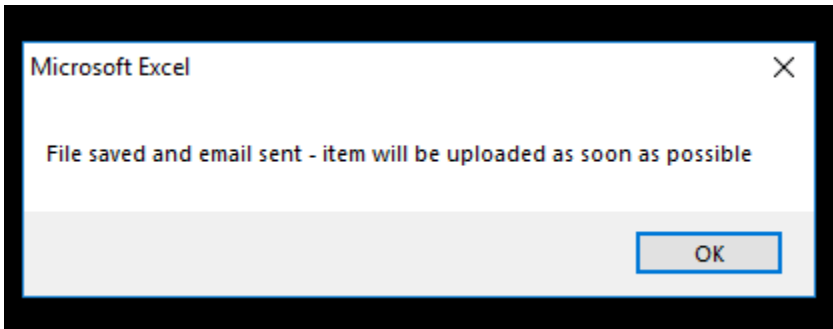
Sent: Tue 26/05/2020 12:00

To: EPROCHELPDESK (UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST)

Message     NPRF - Buyer ONLY.xlsm (360 KB)

Hello, please can these be added to the catalogue.

The Buyer will see a pop up message advising the file has been sent (as below) and they will see a copy of the email in their outbox. They can now close the file.



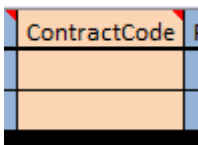
***\*Please note, if you do not save the file, no email will be sent to the helpdesk***

***\*\* to clear sheet click the "CLEAR SHEET" button***

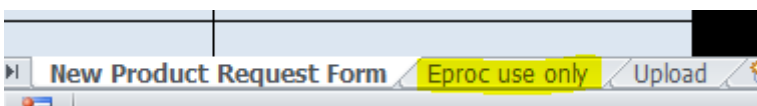


### **Stage 2: eProc Helpdesk**

The file will be received into the eProc Helpdesk Inbox. The team member should add the CPA Number for each item within the list by typing it in to the orange (ContractCode) column on the "New product request form" tab.



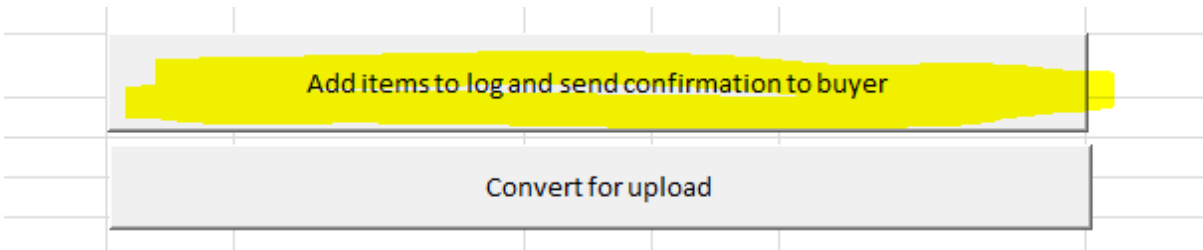
Once complete, they can select the "Eproc use only" tab at the bottom of the sheet.



By doing so, this will automatically allocate ID numbers to the new items which can be seen in columns B – K. These pull through automatically so need no manual intervention.

Buyer	Date	Number	Supplier	Product Code	Description	UOM	Price	Expiry Date	Class
Test ignore	26/05/2020	3	TEST	123-abc	Test item 1	EACH	5.95	31/12/2020	FYZ
Test ignore	26/05/2020	4	TEST	xyz-123	Test item 2	EACH	6.99	31-Dec	FYZ

The eProc team member simply has to click the “Add items to log and send confirmation to buyer” button. This will add the item(s) to the Master Log (G:\ContractInformation\NPR – Revenue\NPR – buyer only.xlsx) and send an email to the Buyer automatically advising the ID number(s) assigned to the New Product Request and that they will now process into the system.



The email will be sent as per the below format with a copy of the log file attached.

**New Product Request**

[REDACTED] (UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST)  
 Sent: Tue 26/05/2020 12:06  
 To: [REDACTED]

Hi [REDACTED]

Hope you're well?

I have just added NPR:4 to the NPR buyer only sheet and will now enter the items into the Nexus catalogue.

Kind Regards

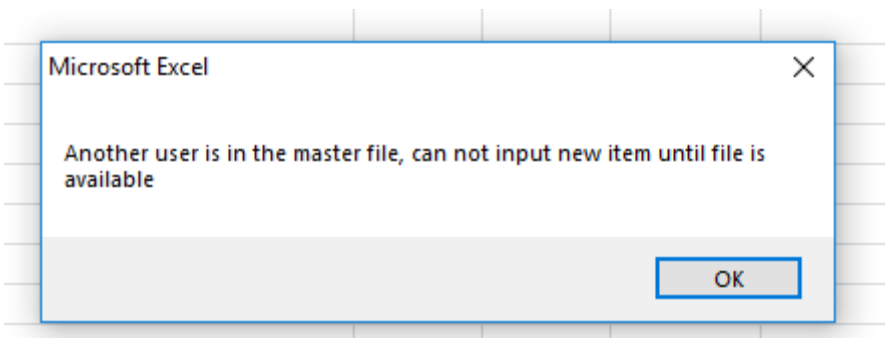
eProc Helpdesk

University Hospitals Plymouth NHS Trust - Procurement Department

Ground Floor | NU Building | Brest Road | Derriford | Plymouth | PL6 5YE

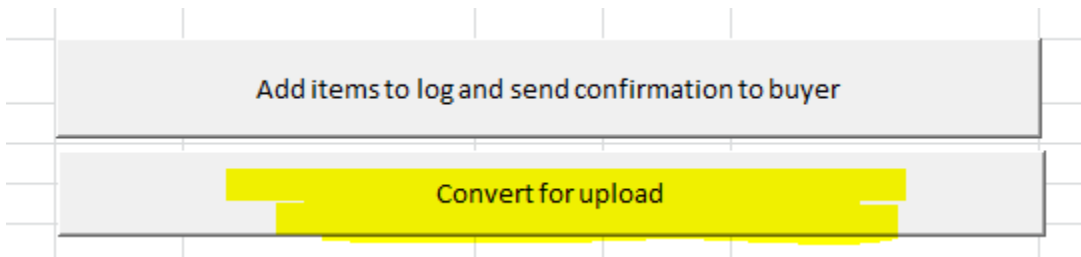
Tel: 01752 439628

***\*Please note, if someone is already in the master file a warning box will be displayed as below. It is not possible to add new entries and save the file if someone is already using it so they should be contacted to exit the file as soon as they have finished with it.***



**Stage 3: eProc Helpdesk**

The Helpdesk team member can now prepare the document for upload by simply clicking the “Convert for upload” button also within the Eproc use only tab.



This will automatically populate the “Upload” tab with the details of the new item(s) in the format currently supported for catalogue upload.

It will save a copy in the following location (G:\ContractInformation\Catalogue Management\2020 CATALOGUE CLEANSE\4. COMPLETE) as a txt file, naming it as the supplier name and the ID’s allocated.

The eProc user can then upload the file directly into the catalogue as they would do normally by selecting it from within the folder above.

Please see appendix for workflow.

## 6 Document Ratification Process

The design and process of review and revision of this procedural document will comply with The Development and Management of Formal Documents.

The review period for this document is set as default of five years from the date it was last ratified, or earlier if developments within or external to the Trust indicate the need for a significant revision to the procedures described.

This document will be reviewed by the Finance Senior Management Team Meeting and ratified by the Director of Finance.

Non-significant amendments to this document may be made, under delegated authority from the Director of Finance, by the nominated author. These must be ratified by the Director of Finance and should be reported, retrospectively, to the Finance Senior Management Team Meeting.

Significant reviews and revisions to this document will include a consultation with named groups, or grades across the Trust. For non-significant amendments, informal consultation will be restricted to named groups, or grades who are directly affected by the proposed changes.

## 7 Dissemination and Implementation

Following approval and ratification, this procedural document will be published in the Trust’s formal documents library and all staff will be notified through the Trust’s normal notification process, currently the ‘Vital Signs’ electronic newsletter.

Document control arrangements will be in accordance with The Development and Management of Formal Documents.

The document author(s) will be responsible for agreeing the training requirements associated with the newly ratified document with the **Director of Finance** and for working with the Trust’s training function, if required, to arrange for the required training to be delivered.

## 8 Monitoring and Assurance



- The form has been trialled, but will need constant monitoring and tweaking based on user feedback and improvement opportunities. The changing of online catalogue provider will also mean some amendments to the form layout
- Main responsibility for monitoring will lay with the Senior Data Analyst, and the Data Analyst within the procurement team
- Monitoring will be on going and ad hoc with collation of feedback from eProc helpdesk team and buyers.
- The form or process will be checked and reviewed, any amendments will be made and a new issue of the form raised.
- A new form will be circulated with a new revision and explanation of changes
- Circulation of revised forms will be through procurement team using the form..
- Learning will take place from feedback from users

## 9 Reference Material

N/A

## Appendix

## Appendix 01

<G:\ContractInformation\NPR – Revenue>

HELPDESK – NPRF



EMAIL RECEIVED TO THE HELPDESK INBOX WITH ATTACHMENT



HELPDESK ENTER THE CPA NUMBER(S) INTO THE ORANGE “CONTACT CODE” COLUMN WITHIN THE NEW PRODUCT REQUEST FORM TAB



SELECTING THE “EPROC USE ONLY” TAB, THE USER CAN THEN ADD THE ITEM(S) TO THE MASTER LOG AND SEND AN EMAIL TO THE BUYER INFORMING THEM BY CLICKING THE “ADD ITEMS TO LOG AND SEND CONFIRMATION TO BUYER” BUTTON



THE USER SHOULD THEN CLICK THE “CONVERT FOR UPLOAD” BUTTON, ALSO WITHIN THE “EPROC USE ONLY” TAB – WHICH WILL CONVERT THE FILE INTO THE CORRECT FORMAT FOR CATALOGUE UPLOAD

BUYER - NPRF



COMPLETE AT LEAST 1 LINE OF THE NEW PRODUCT REQUEST FORM TAB, ENSURING THAT ALL PALE BLUE COLUMNS ARE COMPLETE, AND DARK ONES COMPLETE IF KNOWN/ REQUIRED



CLICK THE SAVE AND SEND BUTTON, CHOOSE A LOCATION TO SAVBE THE FILE AND NAME IT. ONCE DONE, THIS WILL UATOMTICALLY SEND THE FILE TO THE EPROC HELPDESK FOR ACTIONING