

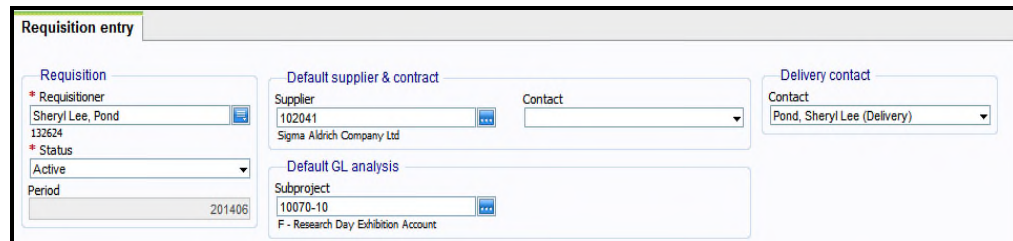
Create a Requisition in Self Service

Login to Agresso. Select Self Service - Procurement – Requisitioning – Requisition Standard


In Requisition entry, the following will default;


Period. The current financial period.

Requisitioner. Your name.



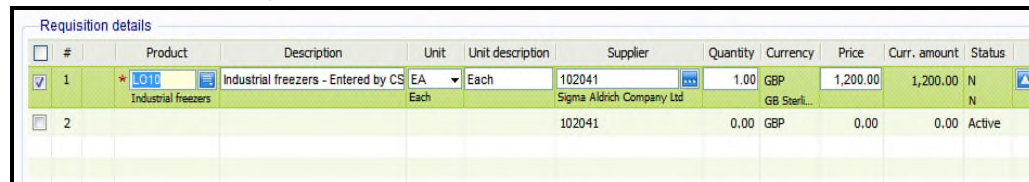
You must also enter:

SupplierID. If unknown use the inline (click in the field and type a character) or Field help to search 

Enter Subproject. If unknown use the inline (click in the field and type a character) or Field help to search 


Delivery address will default to your delivery address

In Requisition Details, you will need to:




#	Product	Description	Unit	Unit description	Supplier	Quantity	Currency	Price	Curr. amount	Status
1	LO10	Industrial freezers - Entered by CS	EA	Each	Sigma Aldrich Company Ltd	1.00	GBP	1,200.00	1,200.00	N
2	Industrial freezers		Each		Sigma Aldrich Company Ltd	0.00	GBP	0.00	0.00	Active



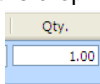
Enter Product If unknown use the inline (click in the field and type a character) or Field help to search 

Replace default description with a meaningful description (optional)

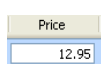
Select the appropriate unit from the drop list




Enter quantity ordered (optional)

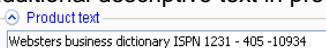



Enter Net Price Per unit or total amount



To add a second or subsequent line click anywhere on the row below or click on the Add button 

Enter additional descriptive text in product text field. This will appear on the Purchase order.



Save once requisition is complete 


Opening Requisitions

Open the standard requisition entry screen



Click on Open

Enter the requisition number


10036454 

Copying requisitions

Open an existing requisition



Click on Copy requisition


 Copy requisition

Using templates


Open an existing requisition



Click on save as template

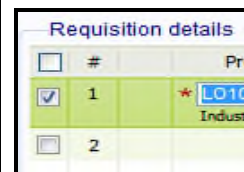
 Save as template

To use a template click on Start from Template

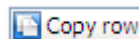
 Start from template

Copying Requisition Lines

Click the box alongside the existing line

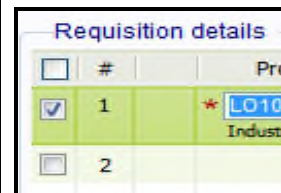


Click Copy row



Deleting Lines

Click the check box alongside the existing line



Click Delete button. 

Approval Task Levels

When a requisition is created it must be approved by all levels before a PO is generated.

< £2000

Budget Holder/PI ONLY

£2001-£10,000

BH/PI plus Cost Centre Manager

£10,001-£50,000


BH/PI plus Senior Executive (Principal, Dep. Principal, Deans for Ed., Research, Students, Institute Dir., Dean of Joint Faculty, Secretary and Dir. of Academic Admin. & Quality, Finance & Corporate Services Dir.)

> £50,001

BH/PI plus Finance & Corporate Services director/Deputy Principal/Principal, Alert to Procurement

Amending a Rejected Requisition

A rejected requisition is received as a workflow task

-  Workflow tasks
- ☒ Rejected items


Click on the task and amend the requisition according to the approvers comments

Workflow log (row 1)

28/07/2010 10:44 Train14 - Distributed
11/08/2010 11:53 Abi Carberry - Rejected - "Cancel"

Mark as closed to terminate the requisition


Requisition details

Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product
	Close		GBP	58.80	10.00	EA	5.88	SA01 Office Equipment

or mark as resubmit to resubmit for approval

Requisition details

Map	Status	Funds check	Currency	Curr. amount	Quantity	Unit	Price	Product
	Resubmit		GBP	58.80	10.00	EA	5.88	SA01 Office Equip...

Save once changes are complete  Save

Blanket/Call off orders

A blanket order uses Qty rather than price to set the total amount of the Purchase order. This can be used for spend with suppliers who will invoice you regularly but do not require multiple purchase orders.

Supplier	Quantity	Currency	Price	Curr. amount
100039 Office Depot UK Limited	2,000.00	GBP GB Sterling	1.00	2,000.00

Amend Purchase Order

- Select Purchase Orders – Order Amendment/ Confirmation
- Enter the PO number and tab
- Edit Purchase Order as required
- Click Save
- Order will go for approval.

-  Purchase orders
-  Purchase order printout
-  Order amendment/confirmation

Cancel (CLOSE) Purchase Order

- Select Purchase Orders – Order Amendment/ Confirmation
- Enter the PO number and tab
- Select the lines you wish to cancel
- Select Terminate from the drop menu
- Order will go for approval.

Goods Receipting (GRN) a Purchase Order in Self Service

Goods receipt (SL)

Workflow user log | Export | Log book | Add to shortcuts | Home | Icons and navigation keys | Help | UNIT4ideas

Order information

Order number: Order status: Supplier:

Delivery date: 2014-01-01

Order line	Supplier product	Supplier product description	Product	Description	Order qty	Ordered amount	Previously received	Qty. received	Unit	Unit price	Cancel the rest of goods to be delivered
1	LF17	Lab Consumables & Sundries Misc.	LF17	GPS Syringe filter 0.45um pore size(MilporeSLVH33K5), product code: FDR-050-470W	3.00	329.67	0.00	0.00	EA	109.89	<input type="checkbox"/>
2	LF17	Lab Consumables & Sundries Misc.	LF17	Pouring ring Duran-pk 10, product code: PTF-690-506H	2.00						<input type="checkbox"/>
3	LF17	Lab Consumables & Sundries Misc.	LF17	Plastibrand-UV-Cuvette semi-micro 100pcs-1.5 to 3.0ml(Plastibrand7591 50), product code: CIA-205-110E	2.00						<input type="checkbox"/>
4	LF17	Lab Consumables & Sundries Misc.	LF17	30ml Universal tube Sterilin, product code: DIS-080-100Q	1.00						<input type="checkbox"/>
5	LF17	Lab Consumables & Sundries Misc.	LF17	7ml-tube-Bijou-Sterilin, product code: DIS-080-10R	1.00						<input type="checkbox"/>
Σ					9.00						

☐ Add ☒ Set received to zero ☒ Receipt all Goods on order ☒ Cancel the rest of goods to be delivered ☐ Delete ☐ Batch and serial information

Receipting must be done in order to release payment.

Select Procurement – Purchase orders – Goods receipt

- Enter PO number in Order No. field
- Enter the quantity received.
- Select Rest cancelled to cancel the remainder, if appropriate

Cancel the rest of goods to be delivered

☐

Previously received Qty. received Unit

0.00 0.00 EA


0.00 0.00

Batch and serial information

Missing Goods Receipt Tasks – To do

The task will be listed as a workflow task ☒ Missing Goods Receipt OrderNo: 3004...

Click on the task link to view the task details.

Receipt the correct quantity in the Qty received field  Save

Approval automatically creates PO Rejection returns to requisitioner. PDF file e-mailed to supplier or requisitioner

If matched payment is made

No match, workflows to requisitioner or approver