

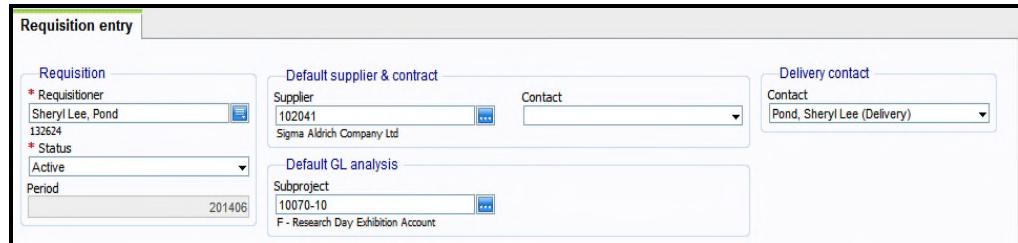
Create a Requisition in Self Service

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.



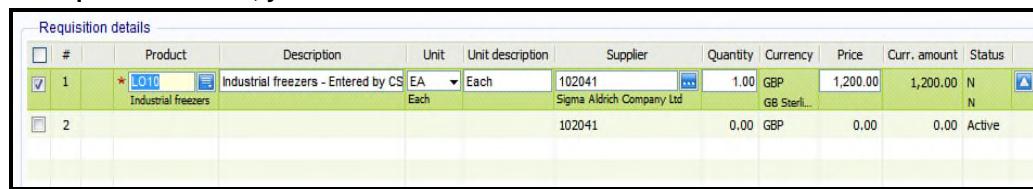
You must also enter:

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:




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

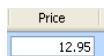
Replace default description with a meaningful description (optional)



Select the appropriate unit from the drop list

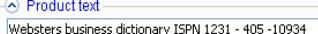


Enter quantity ordered (optional)



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 

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

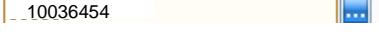
Opening Requisitions

Open the standard requisition entry screen



Click on Open

Enter the requisition number

 10036454 

Copying requisitions

Open an existing requisition



Click on Copy requisition

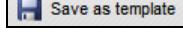


Using templates

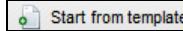
Open an existing requisition



Click on save as template



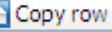
To use a template click on Start from Template



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 

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

<input type="checkbox"/> Map	<input type="checkbox"/> Status	<input type="checkbox"/> Funds check	<input type="checkbox"/> Currency	<input type="checkbox"/> Curr. amount	<input type="checkbox"/> Quantity	<input type="checkbox"/> Unit	<input type="checkbox"/> Price	<input type="checkbox"/> Product
<input type="checkbox"/> Close			GBP	58.80	10.00	EA	5.88	SA01 Office Equipment

or mark as resubmit to resubmit for approval

 Requisition details

<input type="checkbox"/> Map	<input type="checkbox"/> Status	<input type="checkbox"/> Funds check	<input type="checkbox"/> Currency	<input type="checkbox"/> Curr. amount	<input type="checkbox"/> Quantity	<input type="checkbox"/> Unit	<input type="checkbox"/> Price	<input type="checkbox"/> Product
<input type="checkbox"/> Resubmit			GBP	58.80	10.00	EA	5.88	SA01 Office Equipment

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

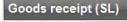
- Select Purchase Orders – Order Amendment/ Confirmation
- Enter the PO number and tab
- Edit Purchase Order as required
- Click Save
- Order will go for approval.



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 Receiving (GRN) a Purchase Order in Self Service

 Goods receipt (SL)

<input type="checkbox"/> Save	<input type="checkbox"/> Clear	<input type="checkbox"/> Documents	<input type="checkbox"/> Workflow user log	<input type="checkbox"/> Export	<input type="checkbox"/> Log book	 Your shortcuts	 Add to shortcuts	 Home	 Icons and navigation keys	 Help	 UNIT4ideas																																																																																																																													
<table border="1"> <tr> <td>Order information</td> <td>References</td> <td>Delivery</td> </tr> <tr> <td>Order number</td> <td>Requested by</td> <td>Delivery date</td> </tr> <tr> <td>Order status</td> <td></td> <td>Delivery time</td> </tr> <tr> <td colspan="3">00:00</td> </tr> </table>												Order information	References	Delivery	Order number	Requested by	Delivery date	Order status		Delivery time	00:00																																																																																																																			
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Receiving 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

<input type="checkbox"/> Cancel the rest of goods to be delivered
<input type="checkbox"/> Previously received <input type="checkbox"/> Qty. received <input type="checkbox"/> Unit
0.00 0.00 EA
0.00 0.00 EA
0.00 0.00 EA
<input type="checkbox"/> 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.

Qty. received 10.00 Save 

Receipt the correct quantity in the Qty received field 10.00 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