WEBAPP1: Requisition Approval/Rejection – Purchasing Officer

The purpose of this section is to introduce a Purchasing Officer how to approve or reject a Requisition on Agresso Web. If the Requisition is approved it will proceed to next step of the Approval workflow until it becomes a Purchase Order. If the Requisition is Rejected it will be sent back to originating requisitioner.

- **If under £100 it will go straight to the Purchasing Officer to Approve.**

- **If over £100 it will go to a nominated Sub-Project Approver. It will then have to be approved by a Purchasing Officer before converting into a Purchase Order.**

- **The higher the requisition amount the more levels of authority have to approve the requisition.**

Once the Requisition has become a Purchase Order it will be automatically emailed/ faxed/ printed off by the Purchasing Officer and sent to the supplier. The Purchase Order will also record a commitment against the appropriate Cost Centre and Sub-Project until all items on the Purchase Order are allocated to the corresponding invoice, or, the Purchase Order is manually closed.

There are two options on how to approve a Requisition:

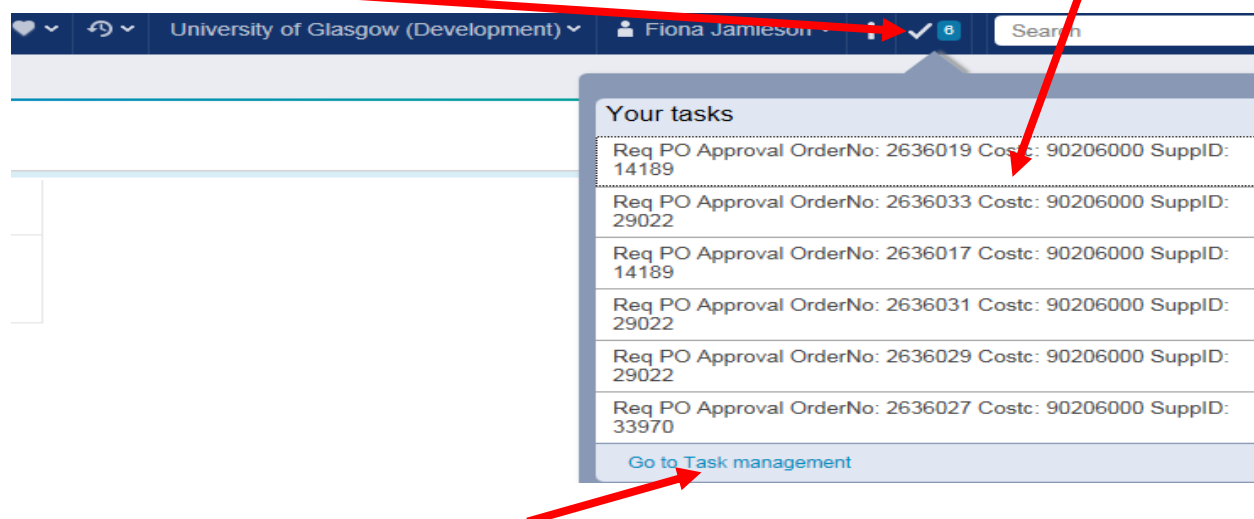WEBPAPP1.2: SIMPLE MODE -   This allows the user to Approve or Reject the whole requisition in one quick process

WEBPAPP1.3: ADVANCED MODE –   This allows the user to Approve and Reject individual lines with further details shown on screen

WEBAPP1.2: SIMPLE MODE Requisition Approval/Rejection

This allows the user to Approve or Reject the whole requisition in one quick process

1. To access the Approval or Reject screen:

Clicking on the task icon opens the task list preview where you can directly select a task.

Or choose to go to [Go to Task management]   where all you will be able to view all yours sorted according to , type of task and importance, due date.

University of Glasgow

Requisition details

Requisition information

Resource	Ian Brown	Requisition number	2636031
Updated	28/05/2015		

Workflow log (row 1)

28/05/2015 15:37 Ian Brown (IAN) - Distributed

(Enter a comment)

Copy

Message from user

training example

Requisition details

	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount	
☐	🖼			LAB33 Laboratory Consumables	12345 - microscope cleaner	29022 THORLABS LTD	2.00	GBP	10.00	20.00	🔼
Σ											

Kit components

Product text

123456 training example

GL Analysis

Map	Status		Account	Costc	Sub_project		Activity	Tax code	TS	Percentage	Amount	
🖼			6440 OTHER LABOR...	90206000 US - Systems	* 141744-01 FIN OFFICE - SYSTEMS	🔲	7400 General OH	* AS Purchases - Std...	13 POT 2	40.00	8.00	🔼

Approve | Reject | Advanced mode | Clear | Open | Workflow user log | Log book | Export

Requisition information

Resource	Ian Brown	Requisition number	2636031
Updated	28/05/2015		

2. Requisition information will show:
    a. Resource   The person who raised the Requisition
    b. Requisition number   Requisition number
    c. Updated   The last update

3. Workflow Log (per row)

Workflow log   The Workflow Comment will show any comments made during the workflow process.

Workflow log (row 1)

28/05/2015 15:37 Ian Brown (IAN) - Distributed

(Enter a comment)

Copy

4.   Message   The purpose of the requisition. This is entered by the Requisitioner

Message from user

training example

5.   Requisition Details   If required click on each row to see the Requisition Details per row

Each row will show the following information and, if required, can be amended by the Purchasing Officer
   a.   Product Code   University Specific Code for Purchasing
   b.   Product Description   Description entered by the Requisitioner
   c.   Supplier   The supplier
   d.   Quantity   The Quantity required
   e.   Currency   The Currency (this will depend on the Supplier selected)
   f.   Price   The Price of the goods before VAT
   g.   Curr. Amount   The Quantity multiplied by the Price

Requisition details

	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount	
☐				LAB33 Laboratory Consumables	12345 - microscope cleaner	29022 THORLABS LTD	2.00	GBP	10.00	20.00	
Σ											

6.   Product Text   For each row you will also see any additional information entered by the Requisitioner for the product required. This can also be amended

Product text

123456 training example

7.   GL Analysis   This shows the details of the Sub-Project that has been selected to pay for the purchases. Some of these fields can be amended
   a.   Account   The Account for Reporting Purposes. **Do not amend**
   b.   Cost Centre   The cost centre for the Sub-Project
   c.   Sub-Project   The Sub-Project Code
   d.   Tax Code   The Tax code for the purchase
   e.   Percentage   The Percentage of cost that is assigned to the Sub-Project
   f.   Amount   The Amount of cost that is assigned to the Sub-Project

GL Analysis

	Map	Status	Account	Costc	Sub_project	Activity	Tax code	TS	Percentage	Amount	
			6440 OTHER LABOR...	90206000 US - Systems	* 141744-01 FIN OFFICE - SYSTEMS	7400 General OH	* AS Purchases - Std...	13 POT 2	40.00	8.00	
Σ									40.00	8.00	

8.   Split Costs   If the costs are to split between different Sub-Projects the percentage/amount split will also be shown.

9.   **APPROVING OR REJECTING THE WHOLE REQUISITION**

Please note that once a requisition is approved or rejected it cannot be undone by the Approver.

[Approve]   [Reject]

[Approve]

10.   **Select** [Approve] **button to Approve the requisition. Once approved by a Purchasing Officer the requisition will convert into a Purchase Order.**

University of Glasgow

11. To Reject the requisition Select [Reject] **button and enter a comment why the requisition is to be rejected. The requisition will then go back to the person who approved the requisition.**

Req PO Approval - Reject
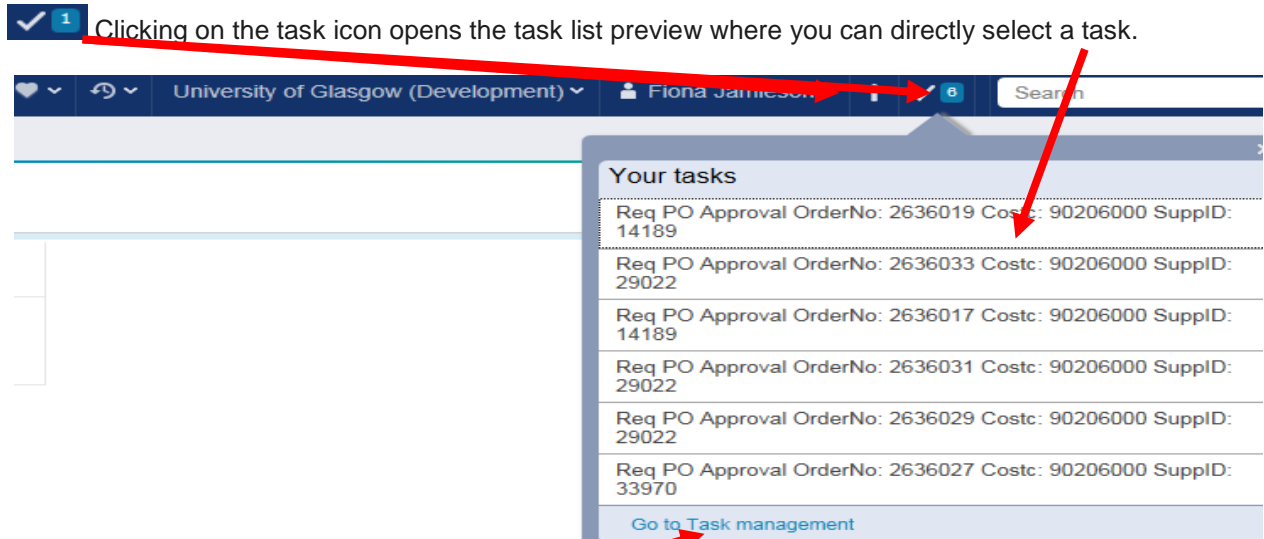
Enter your comment | Item no longer required

[Reject]

WEBAPP1.3: ADVANCED MODE Requisition Approval/Rejection

This allows the user to Approve and Reject individual lines with further details shown on screen

1. To access the Approval or Reject screen:

✓ [1] Clicking on the task icon opens the task list preview where you can directly select a task.

♥ ∨   🕘 ∨   University of Glasgow (Development) ∨   👤 Fiona Jamieson   ⋮   ✓ 6   Search

Your tasks

Req PO Approval OrderNo: 2636019 Costc: 90206000 SuppID: 14189

Req PO Approval OrderNo: 2636033 Costc: 90206000 SuppID: 29022

Req PO Approval OrderNo: 2636017 Costc: 90206000 SuppID: 14189

Req PO Approval OrderNo: 2636031 Costc: 90206000 SuppID: 29022

Req PO Approval OrderNo: 2636029 Costc: 90206000 SuppID: 29022

Req PO Approval OrderNo: 2636027 Costc: 90206000 SuppID: 33970

Go to Task management

Or choose to go to [Go to Task management] where all you will be able to view all yours sorted according to , type of task and importance, due date.

2. To use the Advanced Mode [Advanced mode] options select from the menu at the bottom of the screen

3. The Requisition details shown on screen will be the same as the Simple Mode Approval Screen mentioned in Section WEBAPP1.3

Requisition details

	Map	Status	Funds check	Product	Product description	Supplier	Quantity	Currency	Price	Curr. amount	
☐	🔲			LAB33 Laboratory Consumables	12345 - microscope cleaner	29022 THORLABS LTD	2.00	GBP	10.00	20.00	🔼
☐	🔲			LAB34	1234 Filtration	29022	1.00	GBP	0.01	0.01	

Σ

[Add] [Delete] [Kit components] [Approve] [Reject] [Undo]

4. **Approving a Requisition Row - Select** Approve **to approve each row, or Tick** ☑ **on the Rows required to Approve and select** Approve

	Map	Status	Funds check	Product	Product description	Supplier
☐	🔳	**Approve**		LAB33 Laboratory Consumables	12345 - microscope cleaner	29022 THORLABS LTD
☐	🔳			LAB34	1234 Filtration	29022

Requisition details

5. **Approving all rows - Tick** ☑ **on the below box to select all rows then select** ☑ Approve

✓	Map	Status	Funds check	Product
☑	🔳	**Approve**		LAB33 Laboratory Consumables
☑	🔳	**Approve**		LAB34

Requisition details

6. **Rejecting a Requisition Row - Select** Reject **to reject each row.**

Or Tick ☑ **on the Rows required to Reject and select** Reject

Requisition details

✓	Map	Status	Funds check	Product
☐	🔳	**Reject**		LAB33 Laboratory Consumables
☐	🔳			LAB34

A comment must be entered in the workflow for any rejected requisition.

≫ **Workflow log (row 1)**

28/05/2015 15:24 Ian Brown (IAN) - Distributed

Item Not required

7. **UNDO** – This option will allow the user to undo the Approval or Reject status of the row. Click on the Undo button to revert the line to original status. NB This must be done before requisition is saved

8. **Saving the Requisition Approval/Rejection** Once all the details for the Requisition have been Approved/Rejected the user can then Save the Requisition.

Select the Save **button at the bottom of the screen (you may need to scroll down to see this.**

Once saved the Requisition will then follow a workflow to the approval process until it then becomes a Purchase Order, or, the if Requisition is rejected it will be sent back to the originating requisitioner.
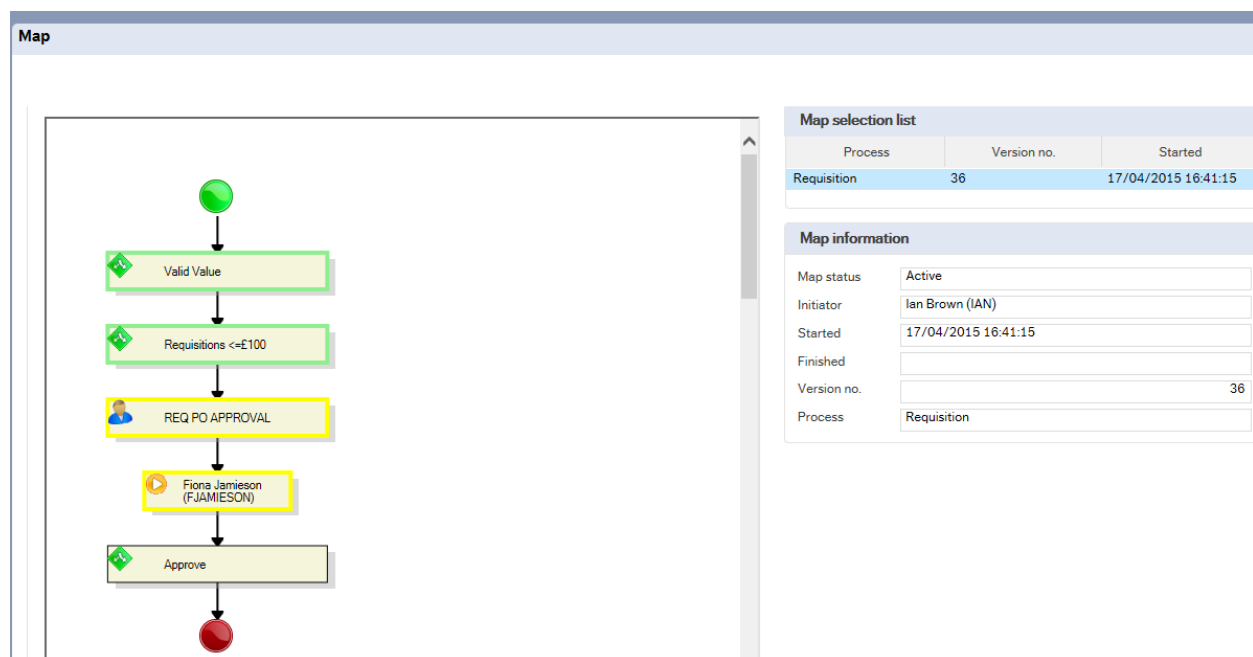
WEBAPP1.3: Workflow Map

The Workflow Map can be used to see what stage of the process each Requisition row is currently at.
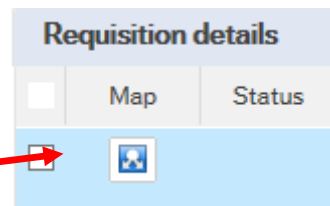
Select the workflow map icon on the required row.

The following screen will appear:

Task stages

 The highlighted areas in yellow show the parts of the workflow that need to be processed.

 If the process has a green tick – the person has completed their process

 If there is a Full Stop – The requisition has been Rejected

Place your cursor over the Workflow stage to see more information regarding each stage.