## WEBREQ1: Requisitions Advanced

The purpose of this section is to explain how to raise a Requisition via the Agresso Web. This Requisition will then follow an Approval workflow until it then becomes a Purchase Order, or, the Requisition is rejected and closed.
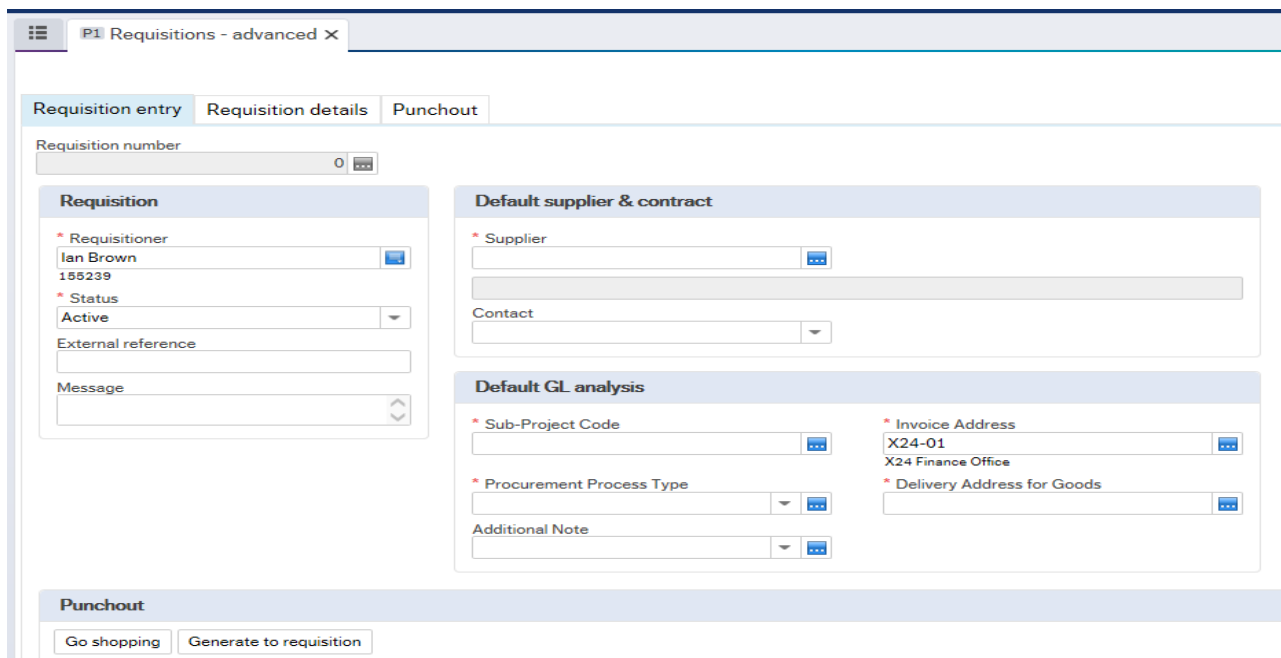
Once the Requisition has become a Purchase Order, and depending who the supplier is, it will be automatically emailed/faxed, or printed off and sent to the supplier. The Purchase Order will also record a commitment against the appropriate Cost Centre and Sub-project until all items on the Purchase Order are allocated to the corresponding invoice or the Purchase Order is manually closed.

WEBREQ1.1: Raising a Requisition
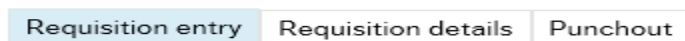
1. To access the Requisitioning screen:
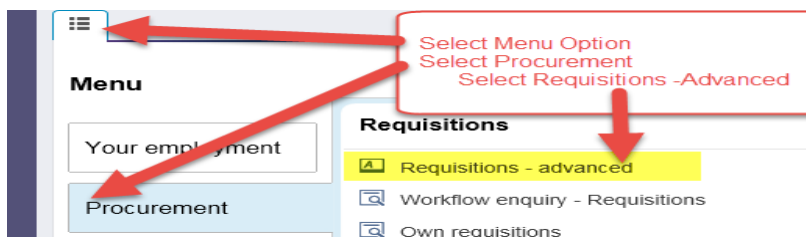
The following screen will appear:

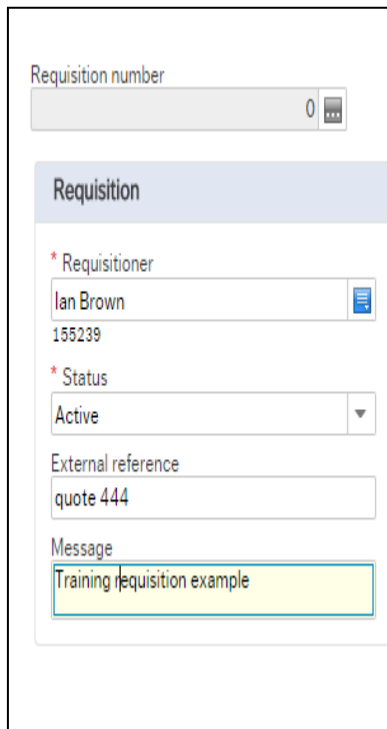**The red star * indicates required fields that must be used when raising a requisition**

2. There are three Tabs on this screen, the first two Tabs will be used to enter the details of the Requisition

The Punchout Tab is used for E-Procurement Orders - See University Agresso website for more details.

WEBREQ1.2: Requisition Entry Tab – Mandatory

The following fields must be populated on this screen (highlighted fields are most relevant):

1. Requisition Number

This appears once all the Requisition details have been entered and the Requisition has been saved.

2. Requisitioner

This will automatically populate with the Staff ID and Name of the person raising the Requisition. This will appear on the Purchase Order as 'Our Reference'.

3. *Status

This will show the Status of the Requisition:
Active – The requisition is currently being raised or processed.
Closed – The Requisition has been manually closed.
Parked – The requisition has been parked – It will not go for approval.

4. External Reference

This field is optional and will be appear printed in 'Your Reference' field on the Purchase Order. Enter the required information that you would like to appear on the Purchase Order e.g. quote number, supplier customer reference/ number/contact, etc…
N.B. Please note this will not appear on the E-procurement orders

5. Message

This field is optional and can be used to pass on information regarding the Requisition. This information will not be printed on the Purchase Order.
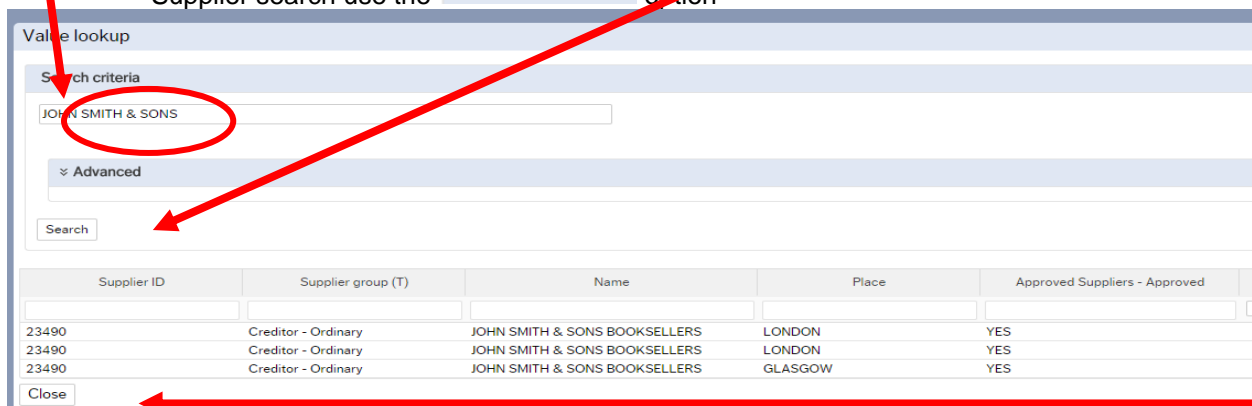
6. *Supplier ID

Only ONE supplier is used per requisition. Either enter in the Supplier ID required or click on [icon] to open the search screen.

In the Search Criteria enter the name of required Supplier. Then click on Search

The results will appear below. Click once on the required Supplier, which will then populate the Supplier ID field and close the search screen. For a more advanced Supplier search use the ⌄ Advanced option

Value lookup

Search criteria

JOHN SMITH & SONS

⌄ Advanced

Search

Supplier ID	Supplier group (T)	Name	Place	Approved Suppliers - Approved	
23490	Creditor - Ordinary	JOHN SMITH & SONS BOOKSELLERS	LONDON	YES	
23490	Creditor - Ordinary	JOHN SMITH & SONS BOOKSELLERS	LONDON	YES	
23490	Creditor - Ordinary	JOHN SMITH & SONS BOOKSELLERS	GLASGOW	YES	

Close

Approved Supplier Field: Any supplier available on the Agresso can be used to raise a requisition. This field will display the approval status of a supplier:

Yes: An existing Current, valid signed Contract/Framework Agreement is available for the supplier selected. This can be checked by visiting the [Procurement Website](#) to check Supplier contracts.
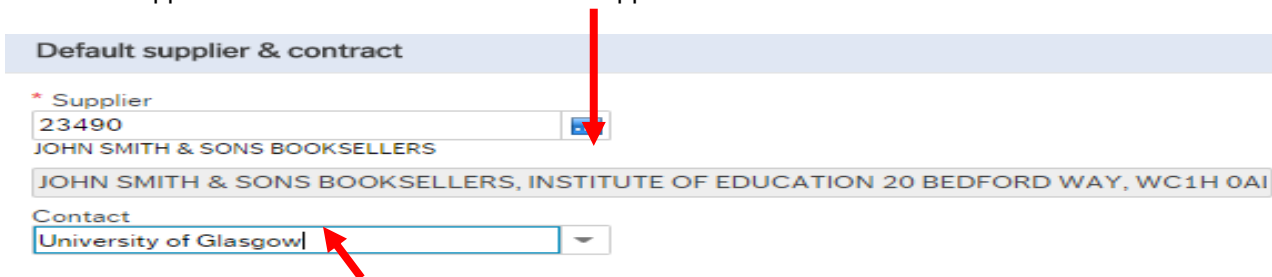
No: No contract / Framework or Quick Quote has yet been identified by the Procurement Office. Users must ensure purchases are in line with the Guidance for Procurements less than £25,000 found at:
http://www.gla.ac.uk/services/procurementoffice/procurement/

Partner: the supplier has been identified as working in partnership with the University of Glasgow.

Property Leases: the supplier has been identified as being used for Property Leases with the University of Glasgow.

Overseas Agent: the supplier has been identified as being used as an Overseas Agent with the University of Glasgow.

Once the Supplier is selected the address for the supplier will see on the screen.

7. Contact   Click on the drop-down box to choose a different address held against the supplier. If there is only one line, and then this will be the default address for the supplier. Once a new address is selected the selected address will be seen on the screen.
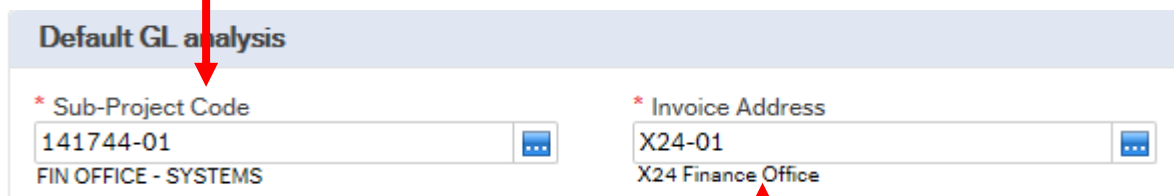

8. *Sub-project Code   Enter the Sub-project code that costs of the purchase will be allocated against. This can be split against different Sub-projects at a later stage.
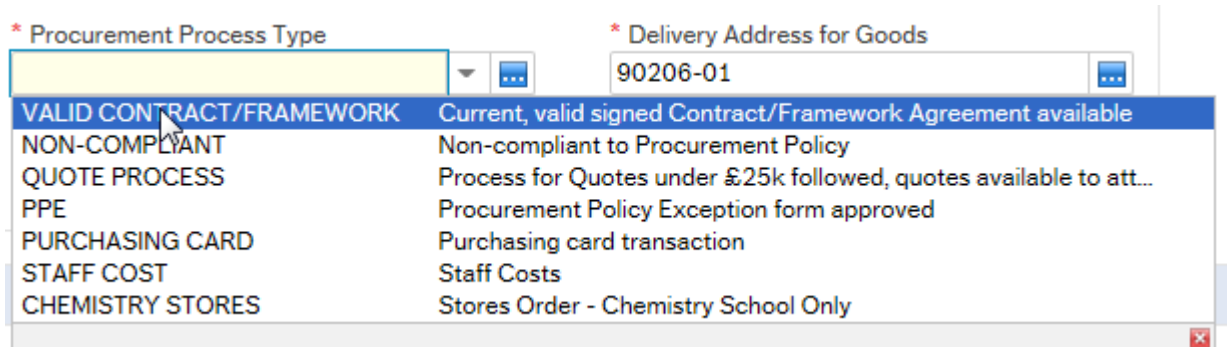

9. *Invoice Address**   This is the address to which the invoices will be sent. This will automatically default to the Finance Office. This cannot be amended.

10. *Procurement Process Type   **From the drop down list you will select the Procurement Policy followed when selecting the supplier and purchase required:**

Procurement Process
Type Options   Description

VALID CONTRACT
/FRAMEWORK   An existing Current, valid signed Contract/Framework Agreement is available for the supplier selected. This can be checked if the supplier is approved in Step 6 or by visiting the Procurement Website to check Supplier contracts.

NON-COMPLIANT   Non-compliant with Procurement Policy – Purchase is **NOT** supported by a valid Contract/Framework Agreement/ Tender/Quote/ Procurement Policy Exception form.

QUOTE PROCESS   Process for Quotes under £25k has been followed as per the university Procurement Process less than £25K.

Value of Purchase*	Requirement
£0 to £999	1 verbal quotation
£1,000 to £2,999	1 written quotation
£3,000 to £4,999	2 written quotations
£5,000 to £24,999	3 written quotations
£25,000 +	Contact Procurement Office

If quotes are available they can be attached to the the to attach to the requisition if required. See Requisitioner User Manual – WEBREQ14 – Attaching Documents to a requisition.

PPE   A Procurement Policy Exception form has been completed and approved. (See Procurement Website for form and guidance).

PURCHASING CARD   This will be selected for Purchasing card Supplier Purchases.
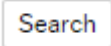
STAFF COST   This would be used to identify Staff Costs such as temporary staff, External Partners Staff costs, sub-contracted labour costs, non-university salaries.

CHEMISTRY STORES   Stores Order - Chemistry School Internal Order Only – This will be only used by the Chemistry School for Raising requisitions against the Chemistry Stores.

If you have any queries, what option you should select when using this field please contact the Procurement Office (finance-procurementhelpline@glasgow.ac.uk).

11. *Delivery Address for Goods   ***Either*** **enter the delivery address code for the address to which the goods are to be sent (e.g. 90206-01, Finance Office)** ***or*** **click on click on** [...] **to open search screen:**
N.B. The full address will be printed on the purchase order.

In the Search Criteria select enter the required School/subject name then click on **Search**
e.g. Finance - SSD
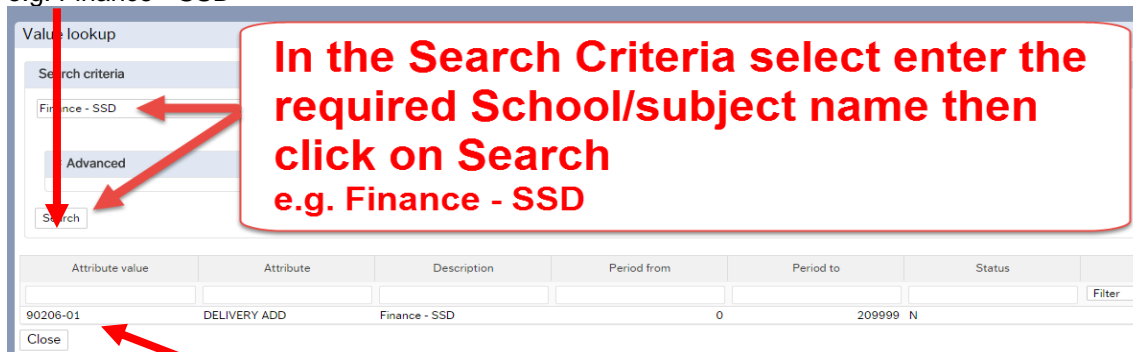
The results will appear below. Click once on the required individual School/Subject Address, which will then populate the Delivery Address for Goods field and close the search screen.

(For a more advanced Supplier search use the ⊙ Advanced *option)*

12. Additional Note

This field is optional and can be used to print extra information on the Purchase Order. Click on drop-down arrow to view the available options.

See an example of how screen could look:
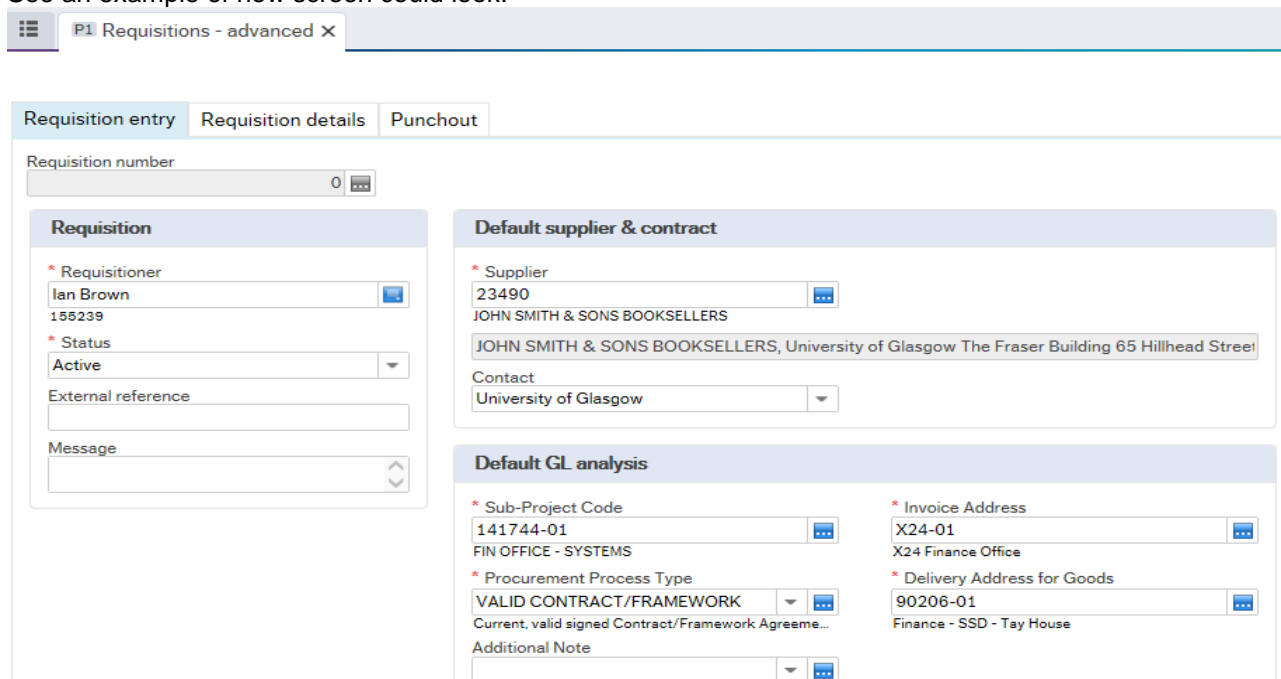
WEBREQ1.3: Requisition Details Tab – Mandatory

The following fields must be populated on this screen **(highlighted fields are most relevant):**

1. **Select** `Add` **to add a row or click on row**

2. *Product Code**   **Enter a Generic Product Code then press Tab on your keyboard.**
    See website for more info on generic product codes:
    http://www.gla.ac.uk/services/agresso/financialcoding/productcodes/
    To search for Product Codes on Agresso click on 📋 **then select**
    🔍 Value lookup

3. Description   **The description must be changed when a Generic Product Code is used. The description can be changed to something more appropriate to match the goods required. This field only has 255 characters. See adding further text in step WEBREQ1.2**. Step 9

    IF POSSIBLE PLEASE ENTER BOTH THE SUPPLIER'S CATALOGUE CODE AND A DESCRIPTION IN THIS FIELD.

    PLEASE NOTE - THE INFORMATION ON THIS FIELD IS ALSO PRINTED ON THE PURCHASE ORDER.
    12345
    The information in the Description Field per row is used when an invoice is automatically matched to the order and will be seen against the transaction details, enquiries and reporting purposes.

4. **Supplier ID**   **This will automatically be populated with the Supplier Id.**
5. Quantity   **Enter the number of goods required. This field must contain and quantity.**
6. **Currency**   **The Currency is automatically added depending on the supplier used.**
7. Price   **Enter the price of the goods before VAT. If not already specified enter the unit price (cost per unit) for the goods. This field must be populated with a price. If item is free 0.01 should be entered.**
8. **Amount**   **This is the amount in GBP before VAT**
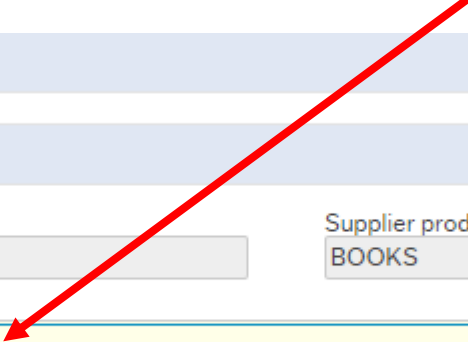
9. Product Text   **More detail can be entered in the Detail Information option**

Click to expand section

To add more rows go back up to WEBREQ1.2. Step 1

GL Analysis   This will show where each row will be charged to.

10. Account   The Account will automatically be selected from the Product Code to which the goods are to be charged.

11. Costc   The Cost Centre to which the Sub_project belongs to.

12. Sub_project   The Sub_project to which the goods are to be charged.

13. Tax Code **The Tax Code to be used for the goods** will automatically be selected depending on the Product Code**.**

AS   Standard rated – 20.0% on purchases
AE   Exempt on Purchases (e.g. education courses or conferences)
AZ   Zero-rated goods (e.g. books)
EF   Where a VAT 'exemption' certificate has been completed (Equipment used in Medical or Veterinary research, charity, advertising). *If using this code please ensure all the order lines are 'VAT' Exemption certificate, if not raise separate orders where lines are not VAT 'exemption' certificate*.
EU   Foreign order (VAT not charged by supplier but may be charged later)
A0   Outside the scope of vat. Should be used in the UK where the supplier is not vat registered or the supplier is a private individual and for some expenditure. Might also be used for Student Fees

14. Percentage   Percentage of the line to be charged to the Sub-project.

15. Amount   Amount of the line to be charged to the Sub-project.

WEBREQ1.4: Splitting Costs per Sub-project

Certain Purchase Orders costs will be split between different Sub-projects. Agresso Web allows order lines to be split, on a percentage basis or amount, over different Sub-projects.

If you wish to split the costs over more than one Sub-project please follow the following instructions:

Click on the first line and enter the percentage of the line or the amount to be charged to the Sub-project.

Click on **Split row** **This will expand this option by adding another row**

Select the second row by clicking on it to enter the Sub-project for the next Sub-project for costs to be split accordingly. Enter the percentage of the line or the amount to be charged to the Sub-project. Select ▲ to update the changes made.

The Total Percentage must equal 100, if not the Requisition will not save.

To keep on splitting costs by more than two Sub-projects select **Split row** to add more rows.

WEBREQ1.5: Adding/Amending/Deleting Rows

To add a row select **Add**

To amend a row click on the required row (should change colour).
Make the required changes then select ▲ to update the changes made

To Delete a row ☑ the required row then Select **Delete**

WEBREQ1.6: Saving the Requisition

To Save the Requisition Click on the Save button at the bottom of the screen

Save

| Save | Clear | Open | Print preview | Export | Log book | Copy requisition | Start from template | Save as template |
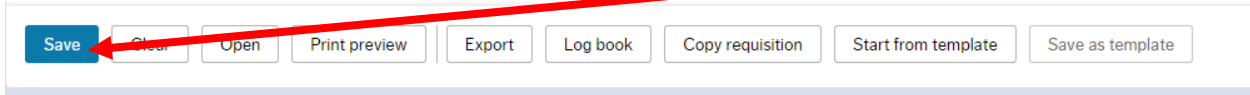
Once saved the user will get a requisition number. This will then go for approval.

✓ The requisition is saved with requisition number 2636026

Any errors see details and amend accordingly

⊘ Please correct the following:
   • **Delivery Address for Goods:** This field must contain a value.