

WEBREQ18: Requisitions E-Procurement Catalogue

The purpose of this section is to introduce the user how to raise an E-Procurement Requisition via the Agresso Web out to the Marketplace. This Requisition will then follow an Approval workflow until it then becomes a Purchase Order or the Requisition is rejected and closed.

Features of E-Procurement

- E-Procurement is the option of ordering goods via a supplier website from Agresso.
- The goods ordered will then convert into a purchase order after going through the approval process
- The purchase order will be electronically sent to the supplier
- The supplier will e-mail the requisitioner confirming the purchase order
- A copy can be viewed/printed/saved if required

E-Procurement - Marketplace

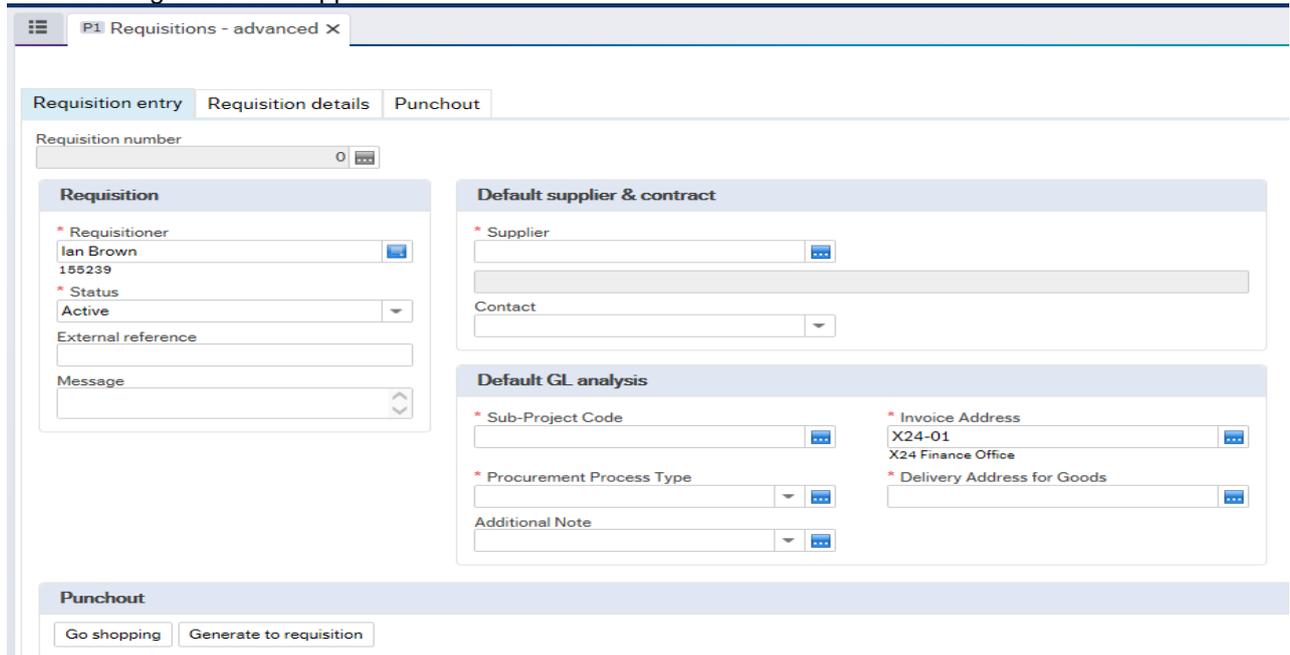
- From Agresso the user will be able to Punch-Out to what is known as a Marketplace website.
- The Marketplace website used by the University of Glasgow is Parabilis.
- The Marketplace website will host catalogues to allow the user to select which the goods are required.
- The Marketplace will also bring back the details selected back to the Agresso Requisition after being retrieved by the user.

WEBREQ18.1: 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

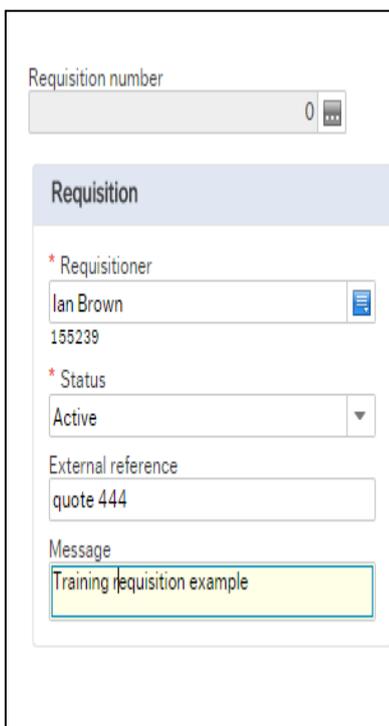
- There are three Tabs on this screen, the first two Tabs will be used to enter the details of the Requisition

Requisition entry Requisition details Punchout

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

WEBREQ18.2: Requisition Entry Tab – Mandatory

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

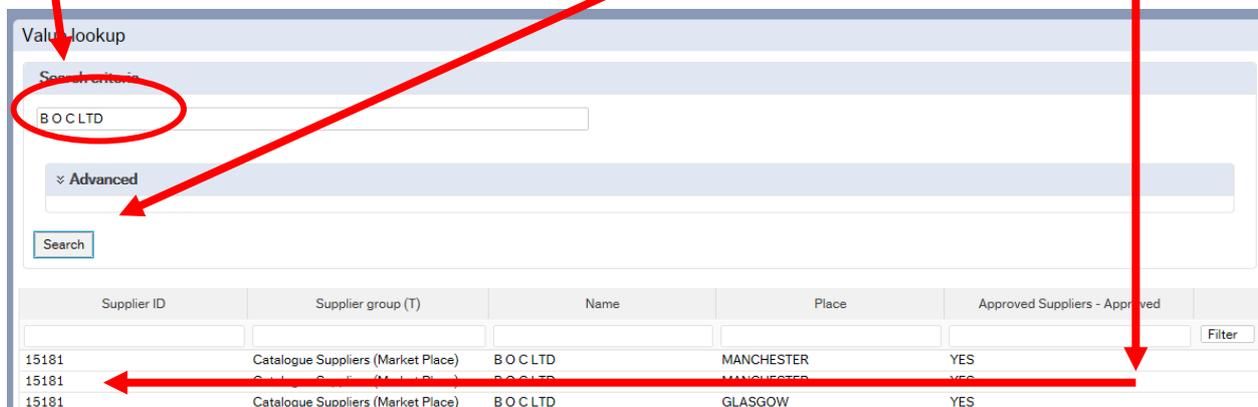
	<ol style="list-style-type: none"> 1. Requisition Number 2. Requisitioner 3. * Status 4. External Reference 	<p>This appears once all the Requisition details have been entered and the Requisition has been saved.</p> <p>This will automatically populate with the Staff ID and Name of the person raising the Requisition. This will appear on the Purchase Order as 'Our Reference'.</p> <p>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.</p> <p><u>N.B. Please note this will not appear on the E-procurement orders</u> This field is</p>
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optional and will be appear printed in 'Your Reference' field on the Purchase Order.

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  to open the search screen.

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



Supplier ID	Supplier group (T)	Name	Place	Approved Suppliers - Approved
15181	Catalogue Suppliers (Market Place)	B O C LTD	MANCHESTER	YES
15181	Catalogue Suppliers (Market Place)	B O C LTD	MANCHESTER	YES
15181	Catalogue Suppliers (Market Place)	B O C LTD	GLASGOW	YES

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

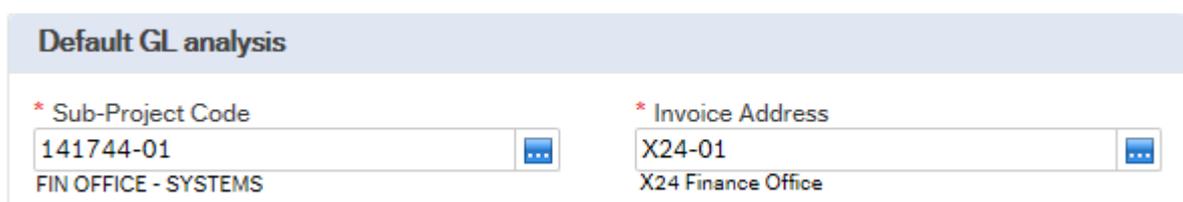


Default supplier & contract

* Supplier
15181
B O C LTD
B O C LTD, POLMADIE ROAD GLASGOW, GLASGOW, United Kingdom

Contact
POLMADIE ROAD

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.



Default GL analysis

* Sub-Project Code
141744-01
FIN OFFICE - SYSTEMS

* Invoice Address
X24-01
X24 Finance Office

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 * Delivery Address for Goods

90206-01

VALID CONTRACT/Framework	Current, valid signed Contract/Framework Agreement available
NON-COMPLIANT	Non-compliant to Procurement Policy
QUOTE PROCESS	Process for Quotes under £25k followed, quotes available to att...
PPE	Procurement Policy Exception form approved
PURCHASING CARD	Purchasing card transaction
STAFF COST	Staff Costs
CHEMISTRY STORES	Stores Order - Chemistry School Only

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 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

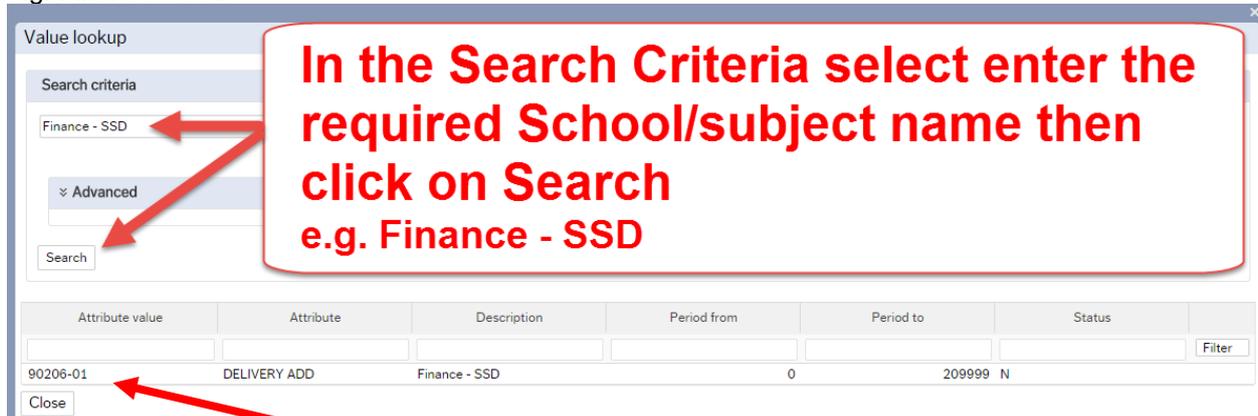
Stores Order - Chemistry School Internal Order Only – This will be only used by the Chemistry School for Raising requisitions against the Chemistry Stores.

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  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

e.g. Finance - SSD



In the Search Criteria select enter the required School/subject name then click on Search e.g. Finance - SSD

Attribute value	Attribute	Description	Period from	Period to	Status	Filter
90206-01	DELIVERY ADD	Finance - SSD	0	209999	N	

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)

Additional Note  

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 the screen could look:

Requisition entry | Requisition details | Punchout

Requisition number: 0

Requisition

* Requisitioner: Ian Brown (155239)

* Status: Active

External reference:

Message:

Default supplier & contract

* Supplier: 15181 (B O C LTD)

B O C LTD, Po Box 12 Worsley, M28 2UT MANCHESTER, United Kingdom

Contact:

Default GL analysis

* Sub-Project Code: 141744-01 (FIN OFFICE - SYSTEMS)

* Procurement Process Type: VALID CONTRACT/Framework (Current, valid signed Contract/Framework Agreeme...)

* Invoice Address: X24-01 (X24 Finance Office)

* Delivery Address for Goods: 90206-01 (Finance - SSD - Tay House)

Additional Note:

13. Go Shopping

This field will allow the user to go the Marketplace to be able to select the required Supplier for E-Procurement requisition. *NB. If asked for password in Marketplace close marketplace website and select GO SHOPPING to try again.*

Punchout

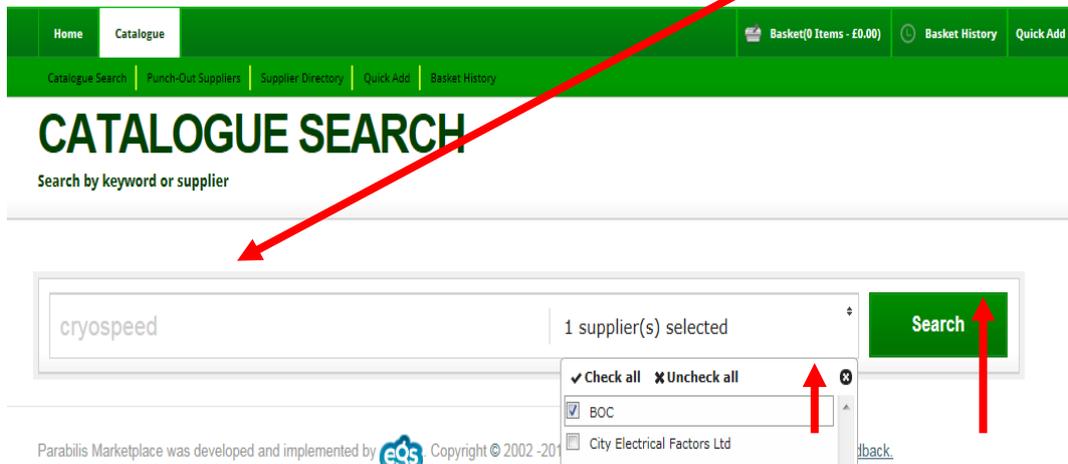
The Marketplace website will open:

WEBREQ18.3: Marketplace

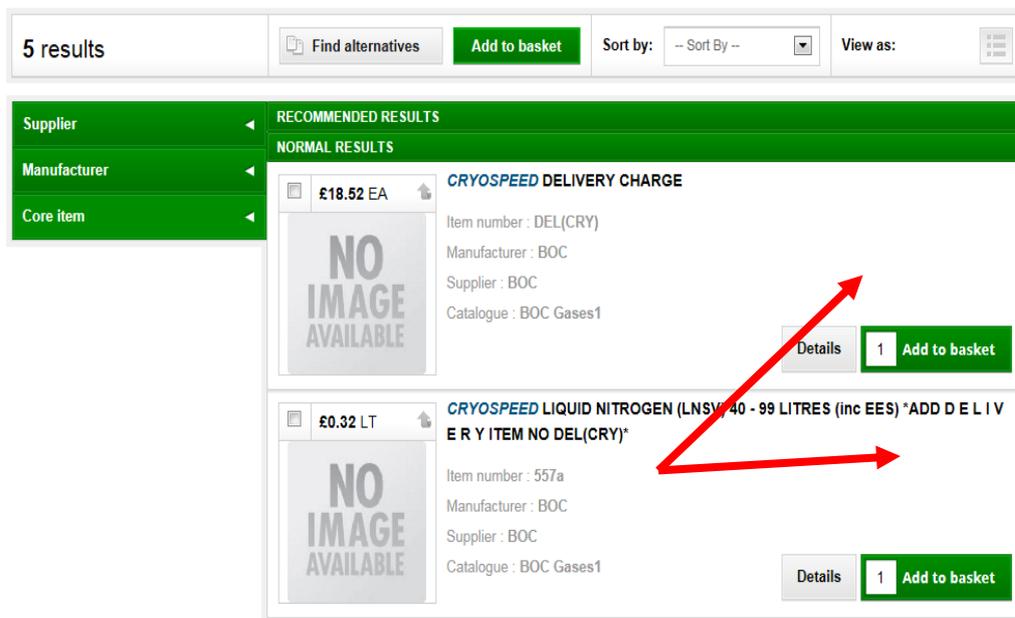


1. The user will select the Catalogue Search.

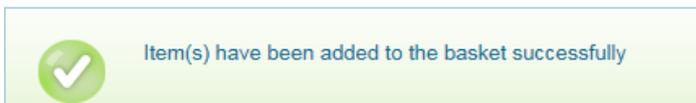
- This will take the user to a search option to find products hosted for a particular supplier on the Marketplace website.
- A keyword for the product required will be entered in the text box. This can be left blank for all products to appear in the search results.



- The user will select the required supplier from the drop down option then click Search



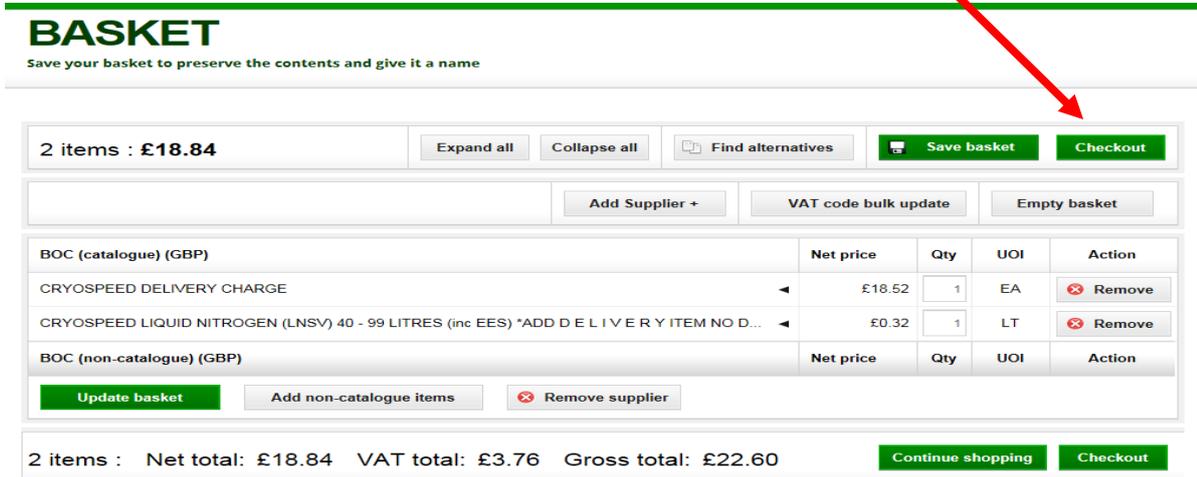
- From the search results user can enter the amount required and add items to the basket. This will be confirmed on the screen



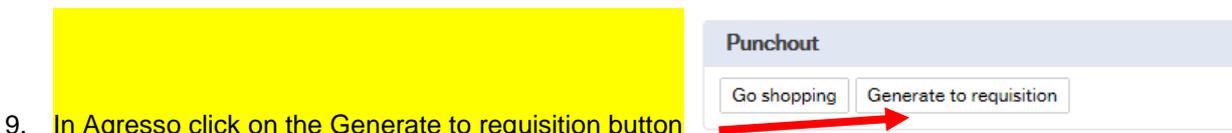
- Once all the items required have been selected the user will go to their basket at the top of the screen:



7. The detail of the basket will appear on screen and the user will Checkout



8. This will close the Marketplace website and take the user back into the Agresso Requisition Punchout Tab



9. In Agresso click on the Generate to requisition button

WEBREQ18.4: Requisitions Detail Tab – Mandatory

10. This will take the details of the ordered goods into the Requisition Details tab

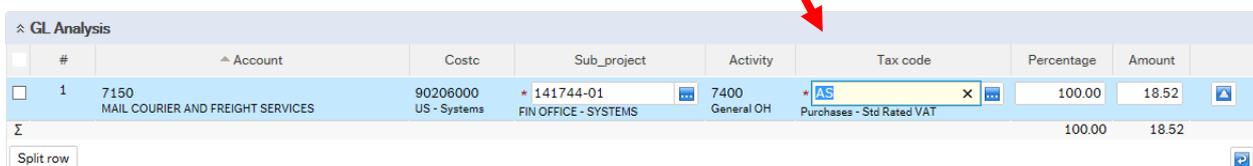
Requisition details										
#	Product	Description	Supplier	Quantity	Currency	Price	Amount	Status		
1	TEL4	CRYOSPEED DELIVERY CHARGE	15181	1.00	GBP	18.52	18.52	Active		
2	LAB78	CRYOSPEED LIQUID NITROGEN (LNSV) 100 - 349 LITRES (inc EES) *ADD D E L I V E R Y I T E M N O D...	15181	1.00	GBP	0.22	0.22	Active		

11. To view more details on any order line click on the required row

12. The quantity can be amended if required

13. The price should not be amended as this comes from the suppliers hosted catalogue.

14. The Tax code can be amended in the GL Analysis if required

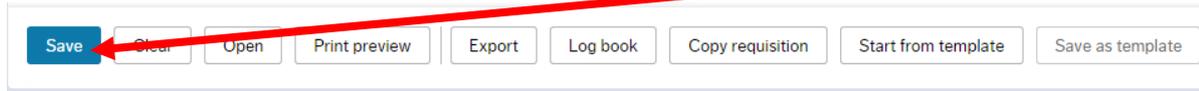


#	Account	Costc	Sub_project	Activity	Tax code	Percentage	Amount
1	7150 MAIL COURIER AND FREIGHT SERVICES	90206000 US - Systems	141744-01 FIN OFFICE - SYSTEMS	7400 General OH	Purchases - Std Rated VAT	100.00	18.52
Σ						100.00	18.52

15. The user will have the option to add rows if required as per a normal requisition - . See online manual for this option
16. The option on how to split the costs of the row can also be used as per normal. See online manual for this option

WEBREQ18.6: Saving the Requisition

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



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.