

WEBREQ19: Requisitions E-Procurement – Free text Option1

The purpose of this section is to introduce the user how to raise an E-Procurement Requisition when the items required are not available on the supplier's website via 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

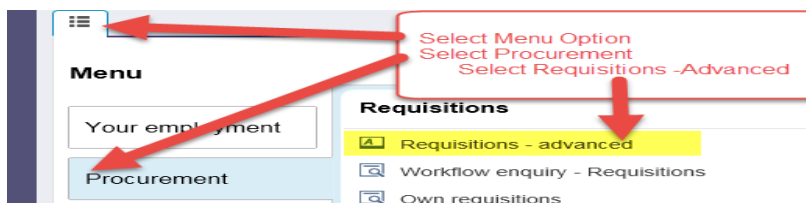
- E-Procurement is the option of ordering goods via the marketplace from Agresso.
- The goods ordered will then convert into a purchase order after going through the approval process
- The purchase order will be electronically sent to the supplier
- The supplier will e-mail the requisitioner confirming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

Procurement - Marketplace

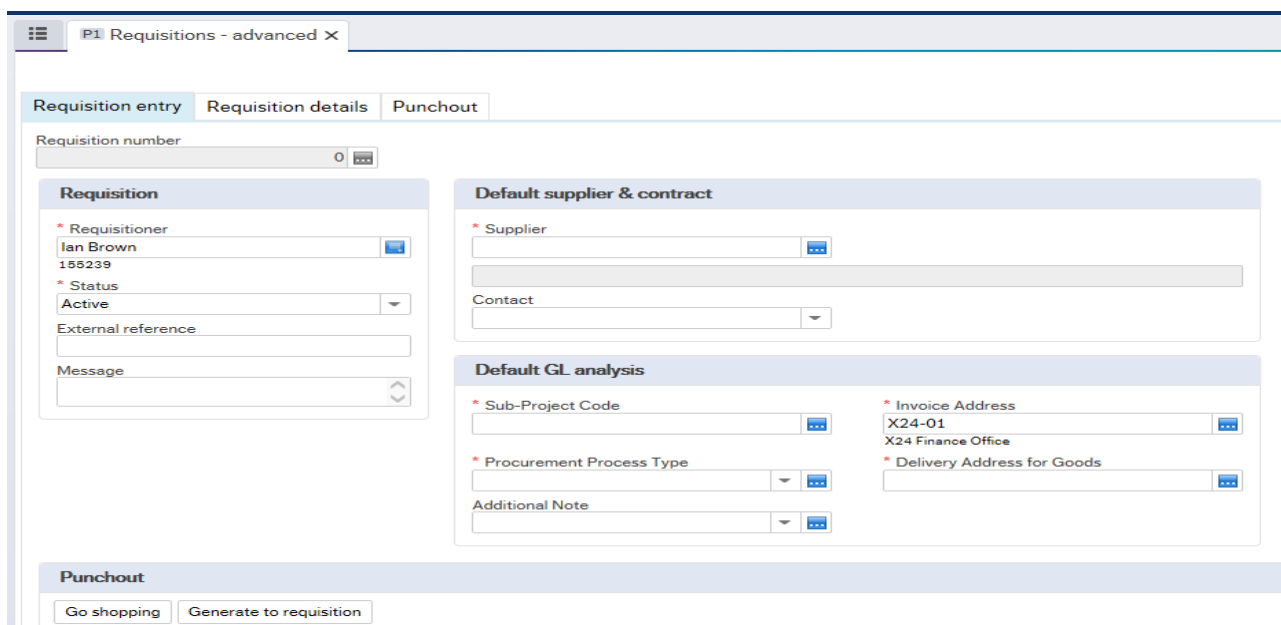
- From Agresso the user will be able to Punch-Out to what is known as a Marketplace website.
- The Marketplace website used by the University of Glasgow is Parabilis.
- The Marketplace website will host catalogues to allow the user to select which the goods are required.
- The Marketplace will also bring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

WEBREQ20.1: Raising a Requisition

1. To access the Requisitioning screen:



The following screen will appear:



The screenshot shows the 'Requisitions - advanced' screen with the following sections:

- Requisition entry** (selected): Requisition number: 0
- Requisition**:
 - * Requisitioner: Ian Brown, 155239
 - * Status: Active
 - External reference: [empty]
 - Message: [empty]
- Default supplier & contract**:
 - * Supplier: [empty]
 - Contact: [empty]
- Default GL analysis**:
 - * Sub-Project Code: [empty]
 - * Procurement Process Type: [empty]
 - Additional Note: [empty]
 - * Invoice Address: X24-01, X24 Finance Office
 - * Delivery Address for Goods: [empty]
- Punchout**:
 - Go shopping
 - Generate to requisition

2. 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.

WEBREQ20.2: 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
N.B. Please note this will not appear on the E-procurement orders. This field is 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 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

Supplier ID	Supplier group (T)	Name	Place	Approved Suppliers - Approved
12749	E-Procurement (Market Place)	FISHER SCIENTIFIC UK LTD	LOUGHBOROUGH	YES
12749	E-Procurement (Market Place)	FISHER SCIENTIFIC UK LTD	LOUGHBOROUGH	YES


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


Default supplier & contract

* Supplier
 
 FISHER SCIENTIFIC UK LTD

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 
 FIN OFFICE - SYSTEMS

* Invoice Address 
 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 

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

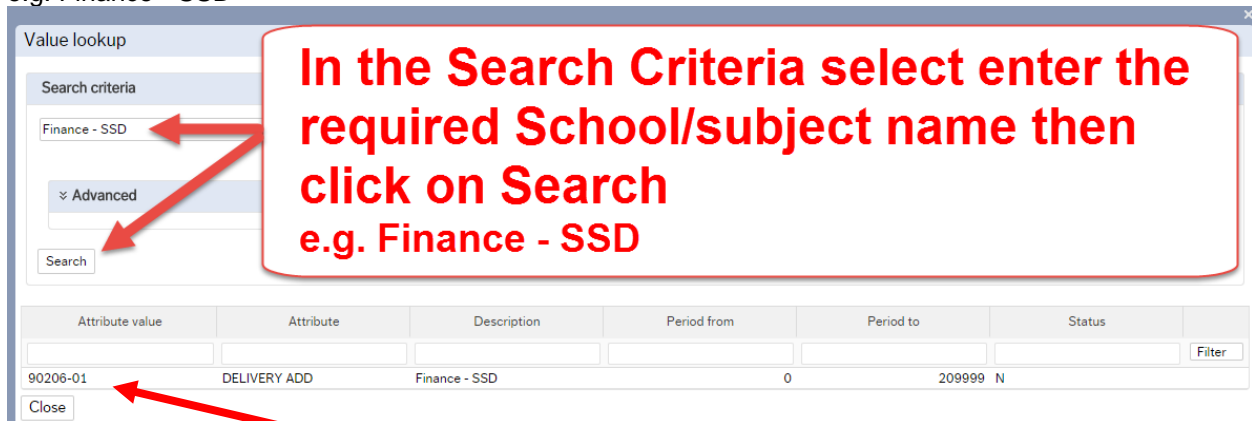
If quotes are available they can be attached to the requisition if required. See Requisitioner User Manual – [WEBREQ14 – Attaching Documents to a requisition.](#)

- 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

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
Jan Brown
155239

* Status
Active

External reference

Message

Default supplier & contract

* Supplier
12749
FISHER SCIENTIFIC UK LTD
FISHER SCIENTIFIC UK LTD, Bishop Meadow Road, LE11 5RG LOUGHBOROUGH, 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 Agree...

Additional Note

* Invoice Address
X24-01
X24 Finance Office

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

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

Go shopping | Generate to requisition

The Marketplace website will open:

WEBREQ20.3: Punchout Tab – Mandatory

This Tab will allow the user to go the Marketplace to be able to enter the goods required instead of punching out to the supplier's website.

Requisition entry | Requisition details | **Punchout**

Remote shopping

Marketplace	Last update	Status
<input type="checkbox"/>		

Delete | Go shopping | Generate to requisition | Retrieve shopping

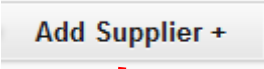
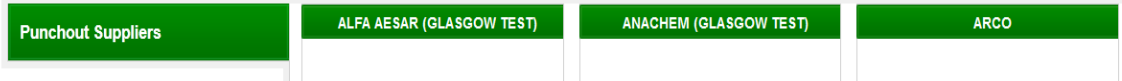
1. Select Go Shopping to go to the Marketplace website (Parabilis)
2. The Marketplace website will open:

3. The user will then select Basket

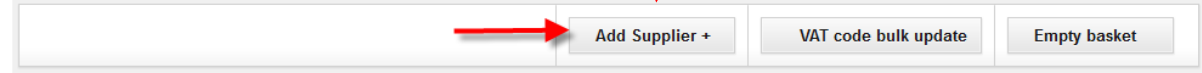
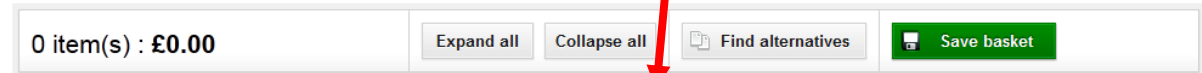
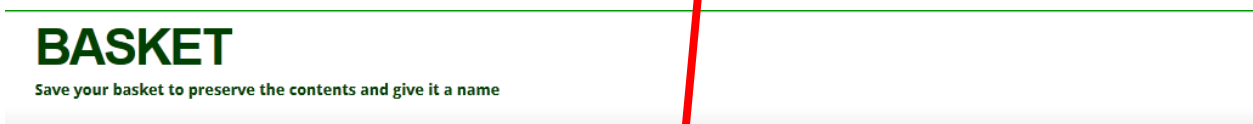


PUNCH-OUT SUPPLIERS

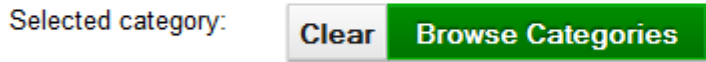
Product browsing is done on the supplier's site



4. Within the Basket screen the user will select



5. The user will then type in the name of the supplier and click Search Suppliers



Point of contact: , 1, 1, 1

6. From the Search results they will select the supplier.

7. This will bring in the option to enter details for the items required.

Description of goods	Enter the Description of goods required
Net Price	Enter Price before VAT
Quantity	Enter the Quantity of goods required

No other fields are required. **PLEASE NOTE THE ONLY FIELDS ABOVE SHOULD BE USED. DO NOT FILL OUT ANY OTHER FIELDS. THE SYSTEMS TEAM WILL NOT BE HELD RESPONSIBLE FOR ADDITIONAL FIELDS ADDED THAT CAN CAUSE YOUR ORDER TO BE MULTIPLIED BY THE PRICE OF YOUR ITEMS.**

Fisher Scientific (non-catalogue) (GBP)	Net price	Qty	UOI	Action
Quote 2345 - Specific product with price from supplier	£ 10	10		Remove

Update basket

8. Once all the items required have been entered select

BASKET

Save your basket to preserve the contents and give it a name

0 item(s) : £0.00 Expand all Collapse all Find alternatives Save basket

Add Supplier + VAT code bulk update Empty basket

Fisher Scientific (non-catalogue) (GBP)	Net price	Qty	UOI	Action
Quote 2345 - Specific product with price from supplier	£ 10	10		Remove
Product 234 - Item not on suppliers website	£ 4	2.50		Remove
	£			Remove

Update basket Add new line + Remove supplier

0 item(s) : Net total: £0.00 VAT total: £0.00 Gross total: £0.00 Continue shopping

9. The next step is to Checkout

Checkout

2 item(s) : £110.00 Expand all Collapse all Find alternatives Save basket Checkout

Add Supplier + VAT code bulk update Empty basket

Fisher Scientific (non-catalogue) (GBP)	Net price	Qty	UOI	Action
Quote 2345 - Specific product with price from supplier	£ 10	10	Each	Remove
Product 234 - Item not on suppliers website	£ 4	2.50	Each	Remove

Update basket Add additional lines Remove supplier

2 item(s) : Net total: £110.00 VAT total: £22.00 Gross total: £132.00 Continue shopping **Checkout**

10. In the Checkout page the Category Coding needs to be selected. This determines the Product code that will be used for the item. Select **Assign codes**

CATEGORY CODING

Category codes for items could be changed or defined

<input type="button" value="Back to basket"/> <input type="button" value="Continue"/>					
Description (Fisher Scientific)	UNSPSC code and category description	Price	Qty	Net value	Assign codes
Quote 2345 - Specific product with price from ◀		£10.00	10	£100.00	
Product 234 - Item not suppliers website ◀		£4.00	2.50	£10.00	
<input type="button" value="Back to basket"/> <input type="button" value="Continue"/>					

11. This will allow you to select a category code that is associated to your product. There are two levels. Selecting Level1 will then allow you to choose/click on the Level 2 category code required.

Level 1	Level 2
Laboratory and Measuring and Observing and Testing Equipm >	Laboratory and scientific equipment ←
	Laboratory supplies and fixtures
	Measuring and observing and testing instruments
<input type="button" value="Move up a level"/> <input type="button" value="Move down a level"/>	

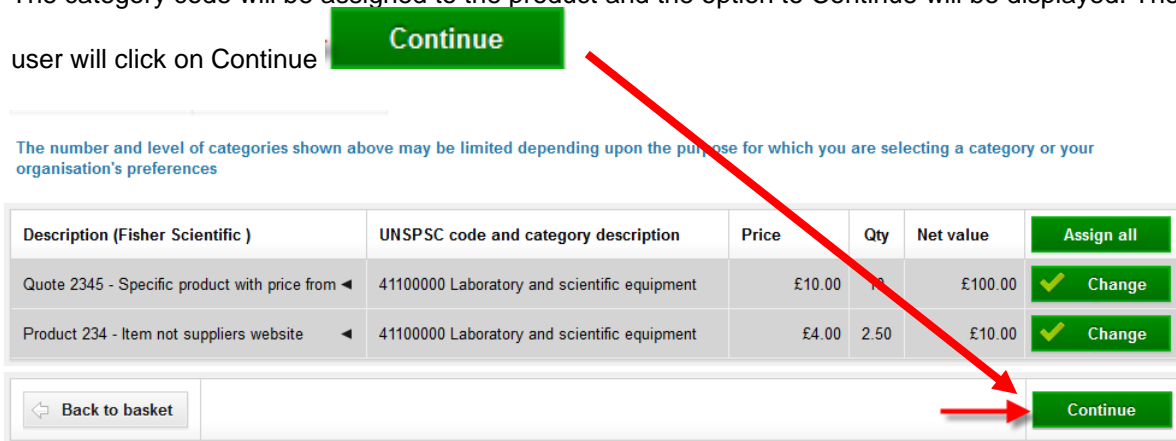
The number and level of categories shown above may be limited depending upon the purpose for which you are selecting a category or your organisation's preferences

Description (Fisher Scientific)	UNSPSC code and category description	Price	Qty	Net value	Assign all
Quote 2345 - Specific product with price from ◀		£10.00	10	£100.00	Assign
Product 234 - Item not suppliers website ◀		£4.00	2.50	£10.00	Assign
<input type="button" value="Back to basket"/> <input type="button" value="Continue"/>					

12. The category code selected can then be assigned to a particular row **Assign** or all of the goods required **Assign all**.

Steps 11 and 12 would need to be repeated for each row if the category code is different each time.

13. The category code will be assigned to the product and the option to Continue will be displayed. The user will click on Continue

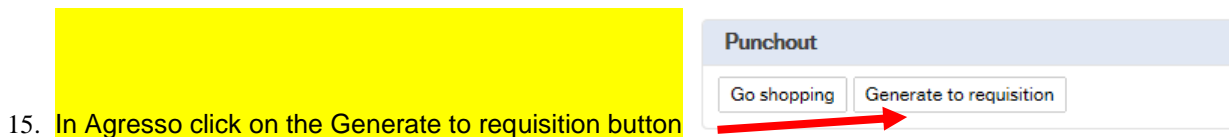


The number and level of categories shown above may be limited depending upon the purpose for which you are selecting a category or your organisation's preferences

Description (Fisher Scientific)	UNSPSC code and category description	Price	Qty	Net value	Assign all
Quote 2345 - Specific product with price from ◀	41100000 Laboratory and scientific equipment	£10.00	10	£100.00	✓ Change
Product 234 - Item not suppliers website ◀	41100000 Laboratory and scientific equipment	£4.00	2.50	£10.00	✓ Change

Back to basket Continue

14. This will close the Marketplace website and take the user back into the Agresso.



Punchout

Go shopping Generate to requisition

15. In Agresso click on the Generate to requisition button

WEBREQ20.4: Requisitions Detail Tab – Mandatory

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

Requisition entry **Requisition details** Punchout

Requisition details										
	#	Product	Description	Supplier	Quantity	Currency	Price	Amount	Status	
<input type="checkbox"/>	1	LAB22	Quote 2345 - Specific Product with Price from supplier	0	10.00	GBP	10.00	100.00	Active	
<input type="checkbox"/>	2	LAB22	Product 234 - Item not Suppliers website	0	4.00	GBP	2.50	10.00	Active	

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

18. The price should not be amended as this comes from the supplier website

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

GL Analysis

#	Account	Costc	Sub_project	Activity	Tax code	Percentage	Amount
1	6650 LAB EQUIPMENT	90206000 US - Systems	* 141744-01 FIN OFFICE - SYSTEMS	7400 General OH	* AS Purchases - Std Rated VAT	100.00	100.00
Σ						100.00	100.00

Split row

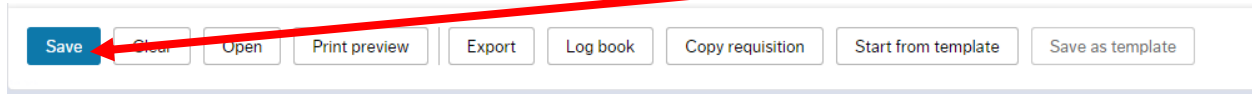
20. PLEASE NOTE YOU WILL NOT BE ABLE TO ADD ADDITIONAL ROWS AT THIS STAGE TO YOUR REQUISITION IF THE INFORMATION HAS NOT COME BACK FROM THE MARKETPLACE. YOU WILL GET AN ERROR MESSAGE WHEN YOU SAVE THE REQUISITION AND LOSE YOUR DETAILS.

21. The option on how to split the costs of the row can also be used as per normal. See online manual for this option

WEBREQ20.5: 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.