

WEBREQ20: Requisitions E-Procurement Free text Option2

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

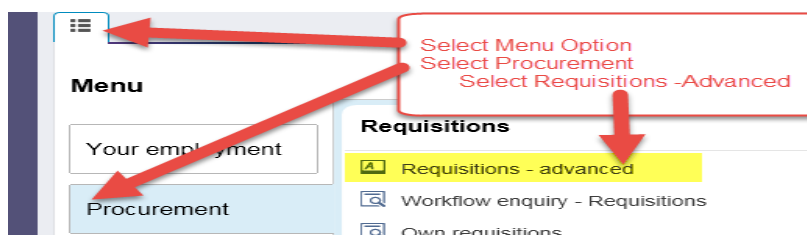
- From Agresso the user will be able to Punch-Out to what is known as a Marketplace website.
- The Marketplace website used by the University of Glasgow is Parabilis.
- The Marketplace website will allow the user to select which supplier is required.
- Marketplace will connect the user to a selected supplier dedicated to the University of Glasgow
- The user will add any additional items that were unavailable on the Suppliers website onto the Marketplace website.
- The Marketplace will transfer the details to the Agresso Requisition after being confirmed by the user.

E-Procurement - Supplier

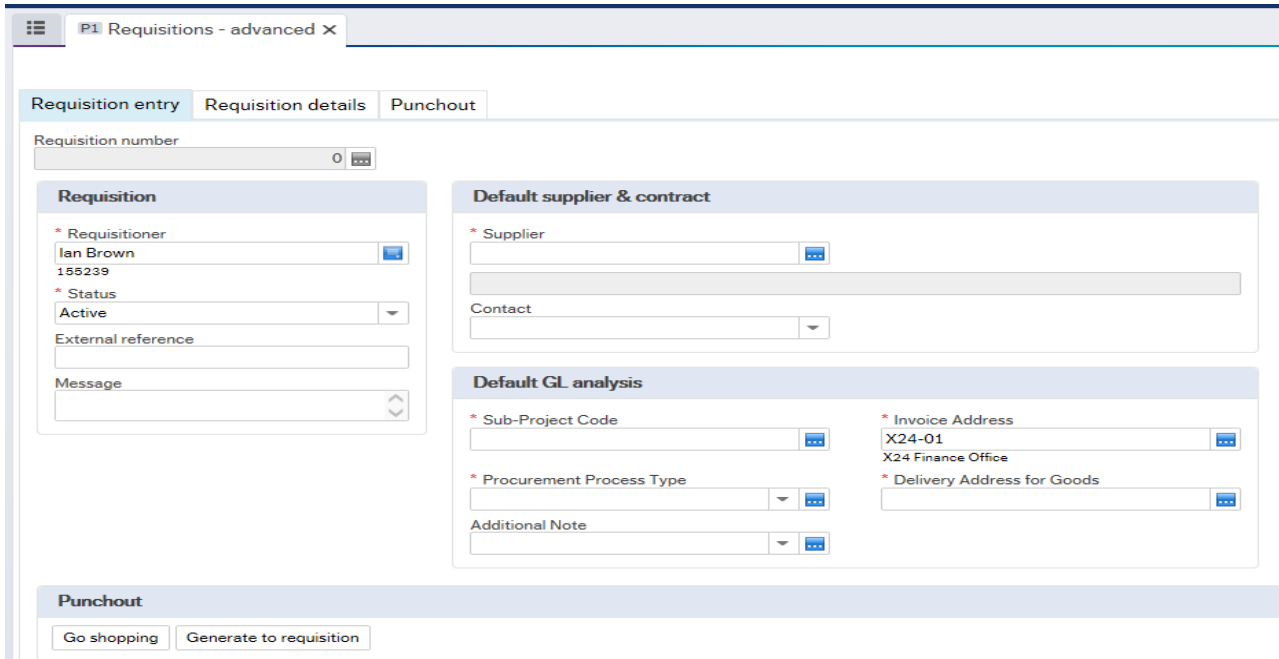
- The Supplier website will be one dedicated to the University of Glasgow contract with specific products and prices.
- On the Supplier website the user will select the products required, create a basket and create a requisition. This will take the details back to the Marketplace with the option to add unavailable products once the basket is back in the Marketplace.
- The Suppliers website should hold the contracted products and also an option to view and select from the Suppliers catalogue (though this may be restricted depending on the contract with the supplier).
- Some suppliers will have the ability to add products if requested.
- The Agresso Support Desk has no control over supplier websites.

WEBREQ19.1: 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

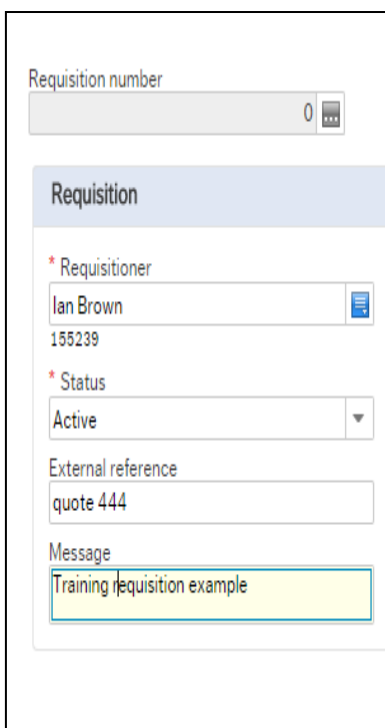
- There are three Tabs on this screen, the first two Tabs will be used to enter the details of the Requisition

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):**



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.

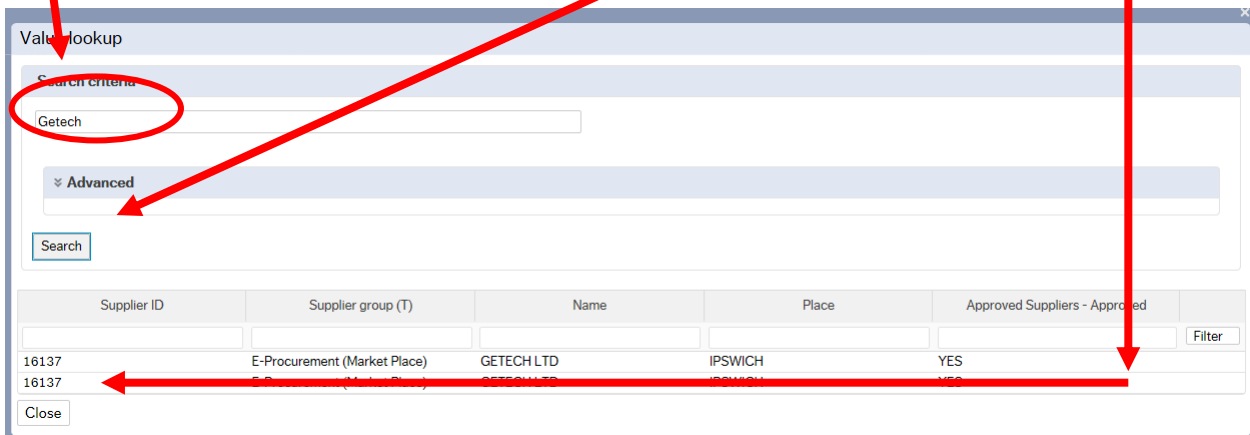
4. External Reference

N.B. Please note this will not appear on the E-procurement orders. This field is optional and will 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	Filter
16137	E-Procurement (Market Place)	GETECH LTD	IPSWICH	YES	
16137	E-Procurement (Market Place)	GETECH LTD	IPSWICH	YES	

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

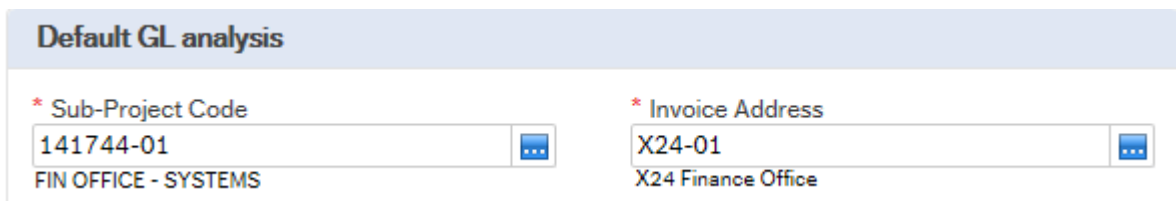


Default supplier & contract


* Supplier
 
 GETECH LTD


 Contact

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

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

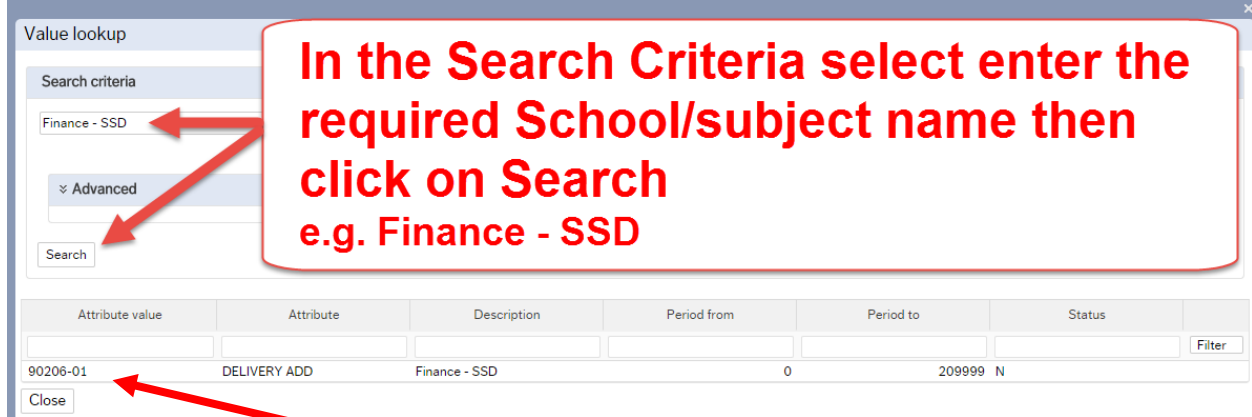
Stores Order - Chemistry School Internal Order Only – This will be only used by the Chemistry School for Raising requisitions against the Chemistry Stores.

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

Requisition

* Requisitioner
 155239

* Status

External reference

Message

Default supplier & contract

* Supplier
 GETECH LTD

Contact

Default GL analysis

* Sub-Project Code
 FIN OFFICE - SYSTEMS

* Procurement Process Type
 Current, valid signed Contract/Framework Agree...

* Invoice Address
 X24 Finance Office

* Delivery Address for Goods
 Finance - SSD - Tay House

Additional Note

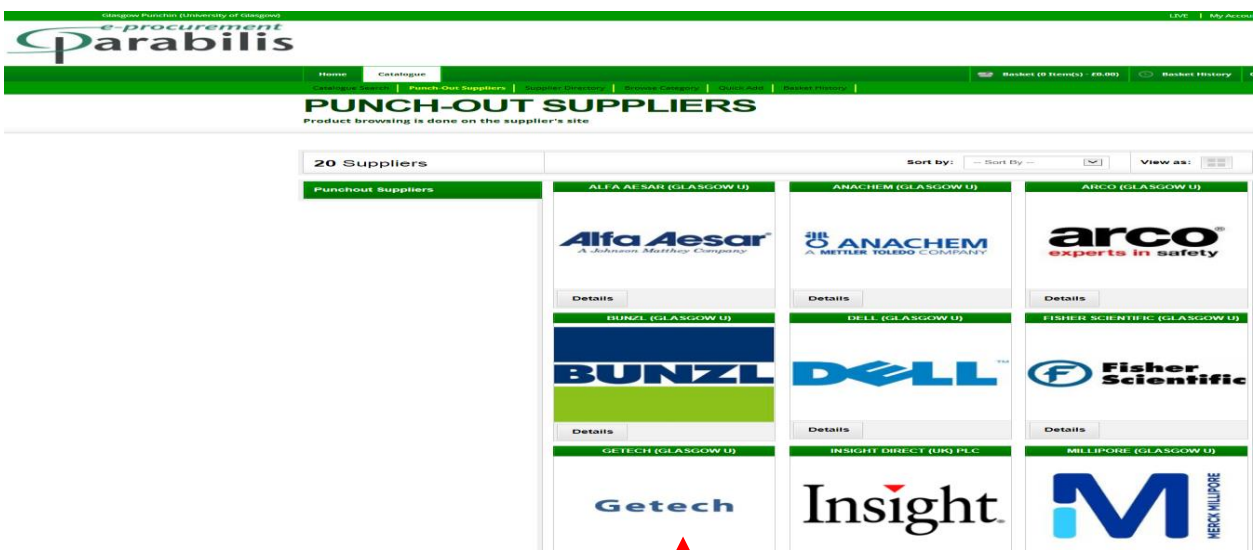
13. Go Shopping

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.*



The Marketplace website will open:

WEBREQ19.3: Marketplace – Mandatory



1. The user will select the Supplier required by clicking on the supplier logo.

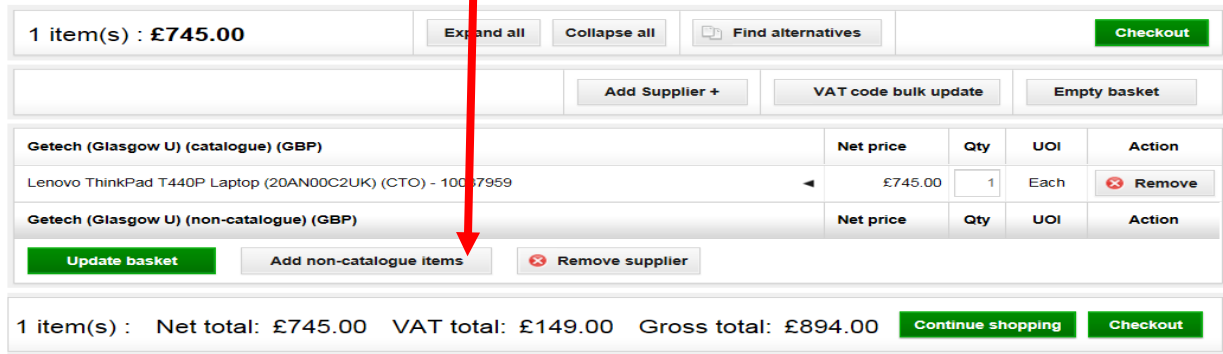
2. This will take the User to the dedicated Supplier Website where the user will select the goods required, create a basket, and follow the instructions on the supplier website to generate a requisition which will then bring back the details into the Marketplace website as a basket.

3. At this point the user can add items that were not available via the Suppliers website into the basket.

The user should select

Add non-catalogue items

BASKET



1 item(s) : £745.00

Expand all Collapse all Find alternatives Checkout

Add Supplier + VAT code bulk update Empty basket

Getech (Glasgow U) (catalogue) (GBP)	Net price	Qty	UOI	Action
Lenovo ThinkPad T440P Laptop (20AN00C2UK) (CTO) - 10087959	£745.00	1	Each	Remove
Getech (Glasgow U) (non-catalogue) (GBP)	Net price	Qty	UOI	Action

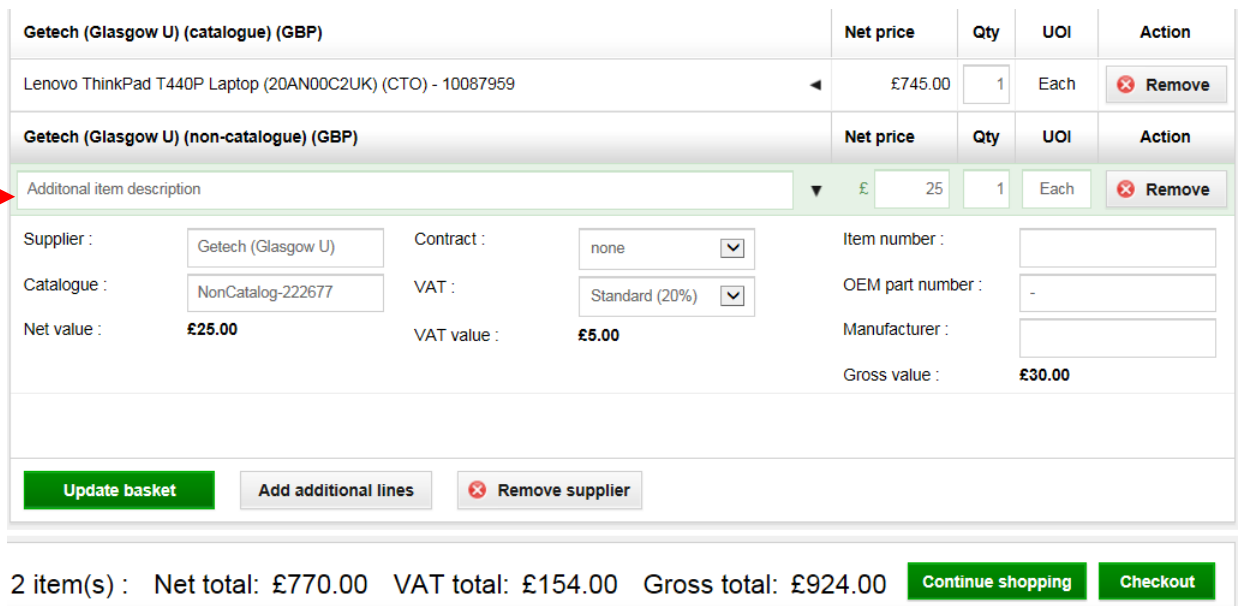
Update basket Add non-catalogue items Remove supplier

1 item(s) : Net total: £745.00 VAT total: £149.00 Gross total: £894.00 Continue shopping Checkout

4. This will bring in the option to enter details for the additional 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.**



Getech (Glasgow U) (catalogue) (GBP)	Net price	Qty	UOI	Action
Lenovo ThinkPad T440P Laptop (20AN00C2UK) (CTO) - 10087959	£745.00	1	Each	Remove
Getech (Glasgow U) (non-catalogue) (GBP)	Net price	Qty	UOI	Action
Additional item description	£ 25	1	Each	Remove

Supplier : Getech (Glasgow U) Contract : none Item number :
 Catalogue : NonCatalog-222677 VAT : Standard (20%) OEM part number :
 Net value : £25.00 VAT value : £5.00 Manufacturer :
 Gross value : £30.00

Update basket Add additional lines Remove supplier

2 item(s) : Net total: £770.00 VAT total: £154.00 Gross total: £924.00 Continue shopping Checkout

Checkout

5. Once all the items required have been entered select

6. 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

Back to basket						Continue
Description (Getech (Glasgow U))	UNSPSC code and category description	Price	Qty	Net value	Assign codes	
Lenovo ThinkPad T440P Laptop	43211500 Computers	£745.00	1	£745.00		
Additional item description		£25.00	1	£25.00		
Back to basket						Continue

7. 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
Mining and oil and gas services	Office and desk accessories
Musical Instruments and Games and Toys and Arts and Crafts and I	Office machines and their supplies and accessories
National Defense and Public Order and Security and Safety Service	Office supplies
Office Equipment and Accessories and Supplies	

Description (Getech (Glasgow U))	UNSPSC code and category description	Price	Qty	Net value	Assign all	
Lenovo ThinkPad T440P Laptop	43211500 Computers	£745.00	1	£745.00	Change	
Additional item description		£25.00	1	£25.00	Assign	
Back to basket						Continue

8. The category code selected can then be assigned to a particular row **Assign**
9. The category code will be assigned to the product and the option to Continue will be displayed. The user will click on Continue **Continue**

Description (Getech (Glasgow U))	UNSPSC code and category description	Price	Qty	Net value	Assign all
Lenovo ThinkPad T440P Laptop	43211500 Computers	£745.00	1	£745.00	<input checked="" type="checkbox"/> Change
Additional item description Click to show additional information	44100000 Office machines and their supplies	£25.00	1	£25.00	<input checked="" type="checkbox"/> Change

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

11. In Agresso click on the Generate to requisition button



WEBREQ19.4: Requisitions Detail Tab – Mandatory

12. 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	Curr. amount	Amount	Status	
1	COM7A	Lenovo ThinkPad T440P Laptop (20AN00C2UK) (CTO) - 10087959	16137	1.00	GBP	745.00	745.00	745.00	Active	
2	STA1A	Additional item description	16137	1.00	GBP	25.00	25.00	25.00	Active	

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

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

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

GL Analysis

#	Account	Costc	Sub_project	Activity	Tax code	Percentage	Amount
1	6640 COMPUTER EQUIPMENT	90206000 US - Systems	141744-01 FIN OFFICE - SYSTEMS	7400 General OH	AS Purchases - Std Rated VAT	100.00	745.00
Σ						100.00	745.00

Split row

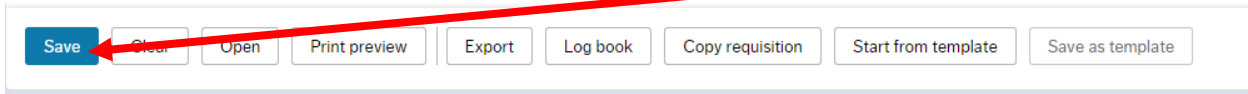
16. PLEASE NOTE YOU WILL NOT BE ABLE TO ADD ADDITIONAL ROWS AT THIS STAGE TO YOUR REQUISITION IF THE INFORMATION HAS NOT COME BACK FROM THE MARKETPLACE. YOU WILL GET AN ERROR MESSAGE WHEN YOU SAVE THE REQUISITION AND LOSE YOUR DETAILS.

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

WEBREQ19.5: 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.