WEBREQ3: Requisitions E-Procurement

The purpose of this section is to introduce the user to how to raise an E-Procurement Requisition via the Agresso Web out to the Marketplace and the specific Supplier websites. 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 Marketplace will also bring back the details ordered on the Suppliers website and transfer them to the Agresso Requisition after being confirmed by the user
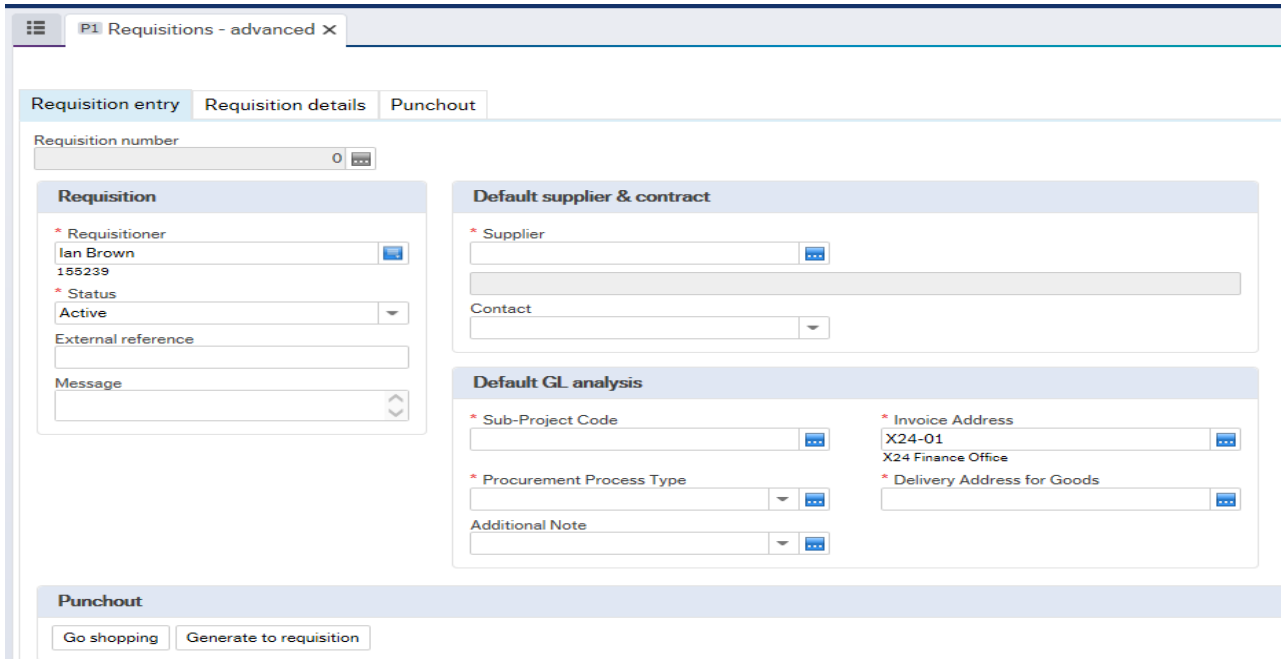
E-Procurement - Supplier

- 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.
- 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

WEBREQ3.1: Raising a Requisition

1. To access the Requisitioning screen:
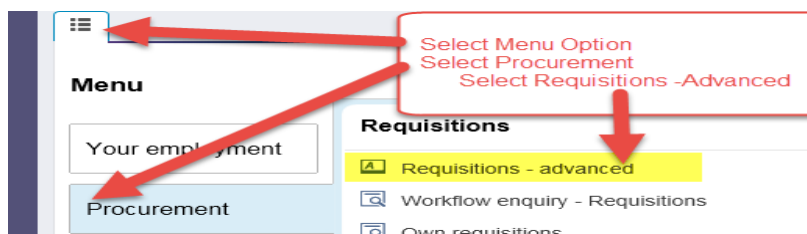
The following screen will appear:

University of Glasgow

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

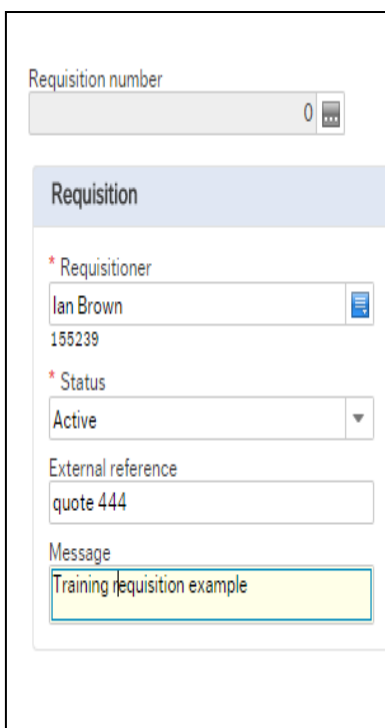2. There are three Tabs on this screen, the first two Tabs will be used to enter the details of the Requisition

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

WEBREQ3.2: Requisition Entry Tab – Mandatory

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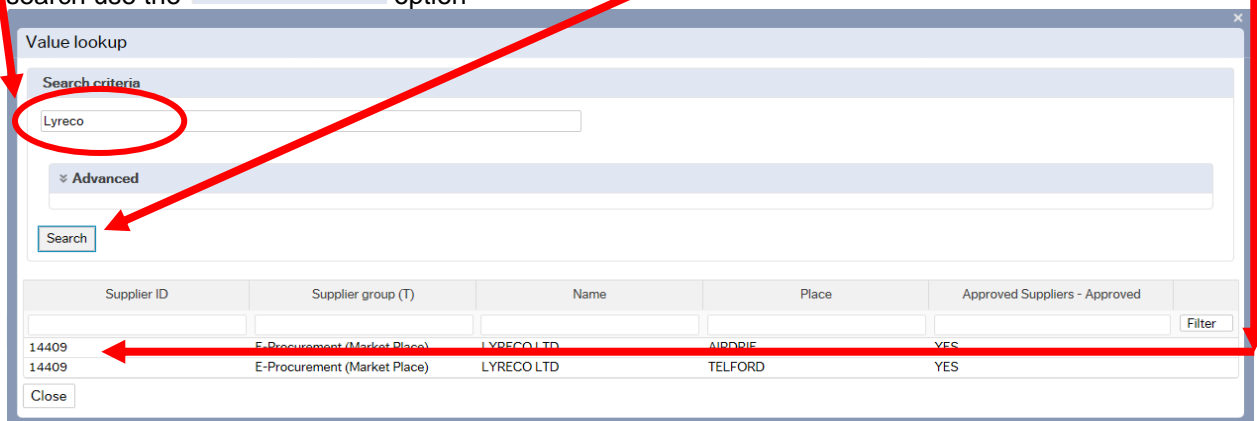

1. Requisition Number	This appears once all the Requisition details have been entered and the Requisition has been saved.
2. Requisitioner	This will automatically populate with the Staff ID and Name of the person raising the Requisition. This will appear on the Purchase Order as 'Our Reference'.
3. *Status	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.

Enter the required information that you would like to appear on the Purchase Order e.g. quote number, supplier customer reference/ number/contact,

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

Once the Supplier is selected the address for the supplier will see 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.
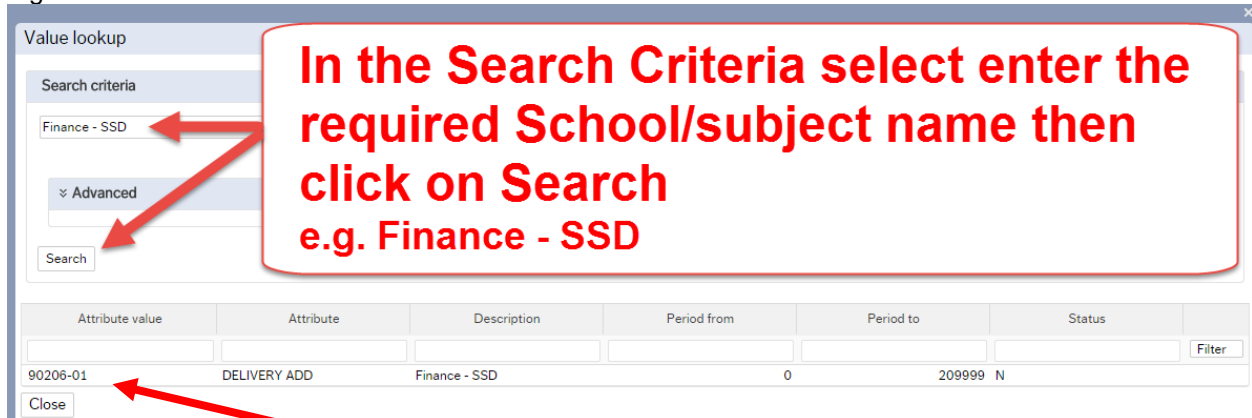
CHEMISTRY STORES   Stores Order - Chemistry School Internal Order Only – This will be only used by the Chemistry School for Raising requisitions against the Chemistry Stores.

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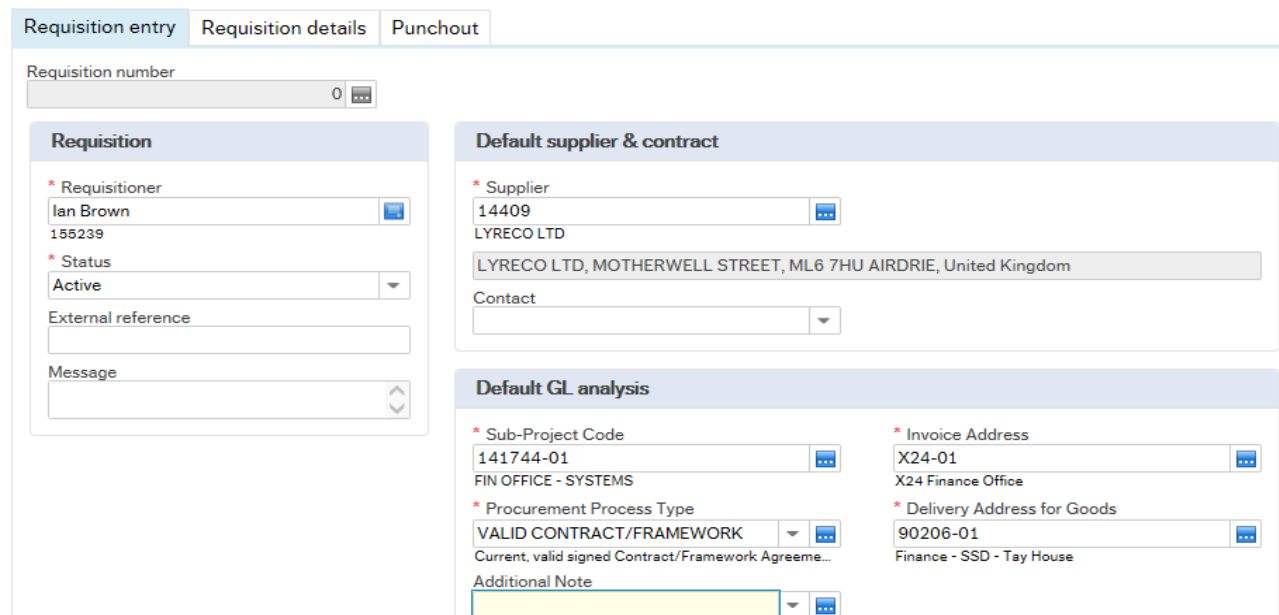
(For a more advanced Supplier search use the Advanced *option)*

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 the screen could look:

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:

WEBREQ3.3: Marketplace – Mandatory
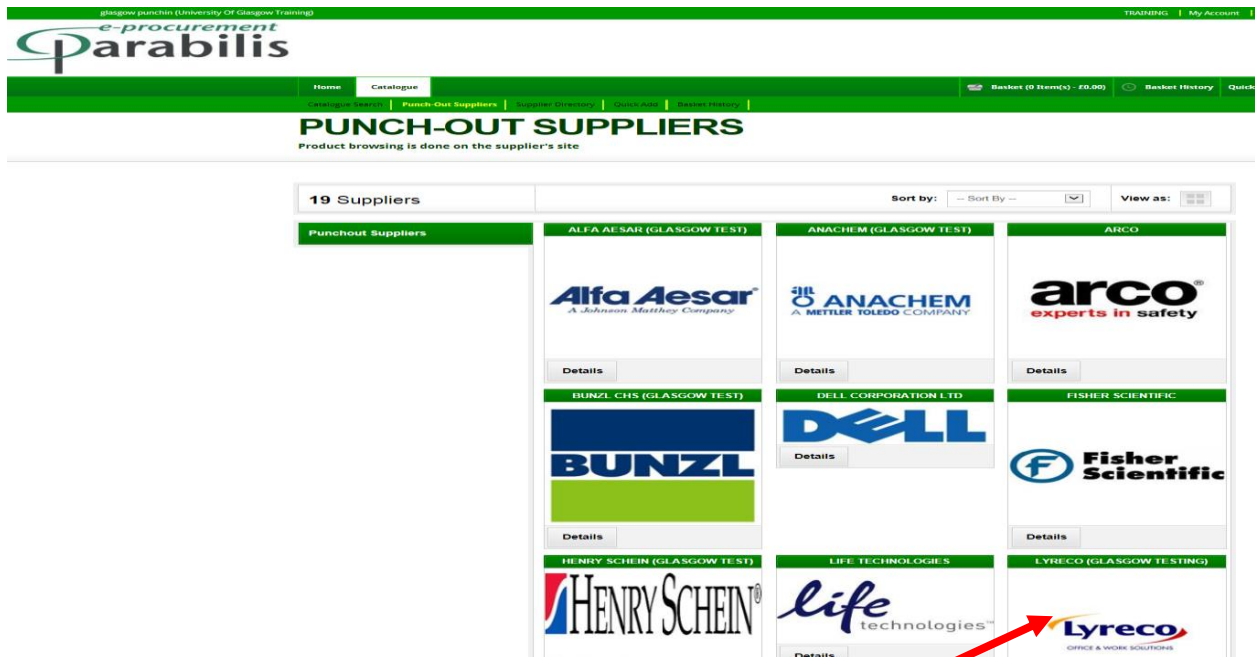
1. The user will select the Supplier required to order the goods from.

2. This will take the User to the selected 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 come back into the Marketplace website.

BASKET

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

3. The user will proceed to select Checkout

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

5. In Agresso click on the Generate to requisition button

WEBREQ3.4: Requisitions Detail Tab – Mandatory

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

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

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

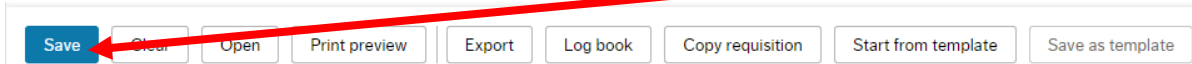9. The Tax code can be amended in the GL Analysis if required

10. 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.

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

WEBREQ3.6: 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.