Requstioning & GRN processing
Agresso Requisitioning

To find the Requisition entry Screen
Click on Procurement

Click on Requisitioning – to open up the folder

Then on Requisitions – Standard
The requisition entry screen comes up – where you see on screens you can create a short-cut on your home page.

To add a short cut to this screen on the Home page – just click on Add to shortcuts – message will appear.

On your home page you now will have the shortcut.
To enter your requisition

Fields marked with an asterisk are mandatory – your details as requisitioner are defaulted in.

External ref – this will be printed on the P.O - use if necessary e.g FAO J Bieber

Message – this field is NOT printed on the PO – can be used for note to your approver or procurement

Enter in the Supplier id – if you click on

this opens up the Field Help
Start your search with the Supplier name – you can use Post Code, City

By inputting just mince (without any wildcards)

By inputting just tatties (without any wildcards)

Click on the Supplier you want – this returns you to the input screen

Input the folder for the requisition.

The site will default to GBL – change if necessary. N.B. usually only required for accounts beginning with 2
Input the Product code – again the field help can be used e.g. fees

Using Stat as search

The products are based on the account code to which the requisition is going to be coded to. Depending on what you are buying these have been split into either 3701 with an A (3701A)-signifies that the requisition is based on the amount 3401 with a Q (3401Q)-signifies that it is based on quantity - some products may only have the one option.
By Selecting 3701A (Amount Based) as your product the Qty defaults to 1.00. Key in the description – this is what will be printed out on the Order for the Supplier – this field is 200 characters and input the price.

If you need more you can use the product text.

The GL analysis line has defaulted in the Account code, folder and Tax code the Vat is defaulted in as P1 (Standard Rate) if in doubt about the VAT leave as the default – if you know correct one just input – list of available codes:

<table>
<thead>
<tr>
<th>Tax code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>PL Stnd Vat 20.0</td>
</tr>
<tr>
<td>P2</td>
<td>PL Zero rated</td>
</tr>
<tr>
<td>P3</td>
<td>PL Exmt Vat</td>
</tr>
<tr>
<td>P4</td>
<td>PL Outwith the Scope</td>
</tr>
<tr>
<td>P5</td>
<td>PL Utilities VAT 5.0</td>
</tr>
<tr>
<td>OS</td>
<td>OVERSEAS NO TAX</td>
</tr>
</tbody>
</table>
To add more lines to your requisition click on **ADD**

A new line is now available

By using product code **3401Q** (Quantity Based) – the Qty column is activated

Complete the line by inputting the correct description, quantity and price

The GL analysis line has defaulted in the Account code, folder and Tax code
You can change the folder and VAT on the GL analysis -

When finished Click on Save

Once saved a requisition number will be generated and it will have entered workflow
To find where your requisition is

Go to your menu on the left hand side – click on **procurement**

Open up the Requisition Menu and click on **workflow enquiry**
The following will appear – if you want to see all that are in work-flow –including finished - just click on search

If only wanting to see one – input requisition number in – eg inputting 20011401 the following appears

For every line on the requisition the individual approvers names will appear- for the above there are two approvers thus the lines are doubled up.

If you click on the workflow in progress
Once approved by your Dept it now moves to procurement

You can see the progress of your requisition – boxes in Green means that it has progressed

This is now sitting with First Approval
You can see the progress of your requisition – boxes in Green means that it has progressed – and Sally has approved this requisition – and it is now waiting for procurement approval.

You can see the progress of your requisition – boxes in Green means that it has progressed – and Sally has approved this requisition – and now approved by Procurement.
You will receive an email notification of the order no when it has finalised the workflow – however this will only be run at a scheduled time per day.

You can find the order number yourself – go to Own Requisitions.
This report shows all your requisitions—showing the status in the workflow.

For requisition 20011352 the status is finished and PO order number has been created PO no 21019605.

<table>
<thead>
<tr>
<th>#</th>
<th>Requisition</th>
<th>Workflow status</th>
<th>Product</th>
<th>Description</th>
<th>Unit</th>
<th>Ordered</th>
<th>Amount (C)</th>
<th>Supplier</th>
<th>Purchase</th>
<th>Deliv date</th>
<th>Contract</th>
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<tr>
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<td>Workflow in progress</td>
<td>30-3Q</td>
<td>Morn Piper Potatoes</td>
<td>EA</td>
<td>5.00</td>
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As a requisitioner you are aware of the procurement guidelines which must be adhered to – an up-to-date guide is on the WEB.

You must attach the relevant quotes etc.

At the top of the Requisition screen there is a **Documents Icon**.

The following screen will appear:

![Document archive](image)

Click on the folder for the document type you want to add.

Then Click on **New Document**.
Check that you are attaching the correct Document type

Click on Browse – to locate your file

Then Click on OK

The folder against Quotes now has a tick to show that something is added – repeat to add all your documents – **DO NOT ATTACH INVOICES**
To close this screen click on

Save requisition
**Unknown Supplier**

If the supplier is not on Agresso enter in the Supplier ID 49999997 and attach the Supplier Details form in the Folder – Supplier Details

Complete the requisition and save

If you check the workflow

Procurement will update the requisition with the new Supplier ID
Requisitions may get rejected by either your Approver or Procurement – which can be for

- Account 3601 used
- Supplier has not to be used for the goods purchased
- Documents not attached – PP1a,quotes
- Supplier Unknown – procurement do not want you to use Supplier
- No budget for goods purchased
- Description is not sufficient

Your rejected requisitions will appear in your task list – depending on who rejected the requisition it will appear under a different task heading

Click on Rejected by Approver

This will open up the list of rejected requisitions by your approver
The requisition entry screen will come up.

To find out why it's been rejected – click on the **Red Triangle** – this will activate the workflow log.

Click on **workflow log** to open up the details.

If it's for missing document – just attach them and save – requisition will go back into the workflow.
Wrong account/ Folder code – amend – change product code to change Account need to open up the GL Analysis to Change Folder -and save - requisition will go back into the workflow.

If the requisition is no longer required – you need to close it

Click on the line item boxes
Now click on Close Button
The status will update from Active to Closed this closes the lines

To completely close the requisition – you need to change the Header from active to closed

If you do not do this the requisition will go back into the workflow

Now click on SAVE
If you now check under your Own requisitions – there is now no workflow
How to receipt your Order

The GRN screen is in the folder Purchase Order (Under the Requisitioning Folder) – open up the folder

Click On Goods Receipt to open up the screen (you can create a shortcut)

Enter in the Order no
Enter the Delivery note number

To receipt you must click to mark the row
Enter the quantity received – **look at the product** – if its 3701A it’s the cost of the service that has been received- if its 3401Q it’s the number of the goods delivered

Either Tab or Press - Click on second line –

Once you have entered the Qty received (either amount or number of items)
Once you have saved a Dispatch number will be displayed

To check what you have received enter in the PO number

If you click on the box at the order line – it will mark all the lines –

Clicking on **Goods received** will update the qty received with either the remaining quantities or the order in FULL

**DO NOT DO THIS IF THE GOODS AND SERVICES HAVE NOT BEEN DELIVERED**

Click on SAVE
If an Invoice is processed before you receipt the order – an email will be sent to you – and a Task will appear in your task list.

For each line on the order that has been matched to an Invoice there will be a task.

Click on the Task and enter the qtys.