Requisitions

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Quick reminders

- When using product codes 1320A and 1420A you must insert a trip number and country code.
- When raising a New Supplier with these Product Codes, overwrite 3999 in the GL Analysis line with 1320/1420, this will open up the boxes for the trip number and country code.
- Purchase order must be raised before work is started by a supplier

Which documents are needed on a requisition?

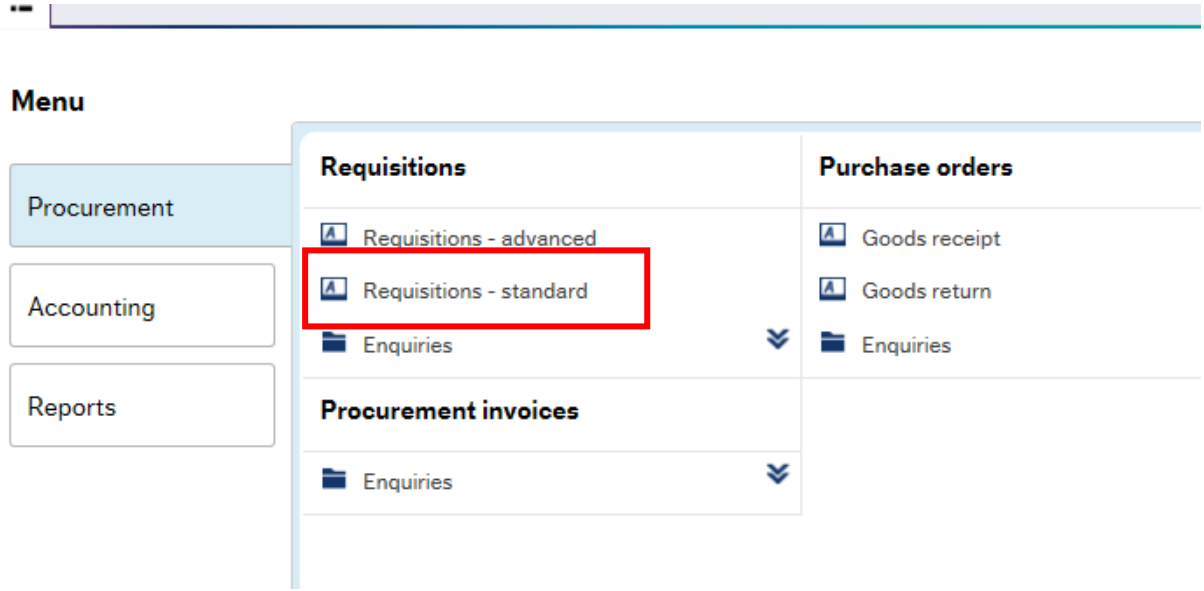
- ✓ Procurement Request Form (PRF) – Required on **all** orders over £12.5k
- ✓ Minimum of 2 quotes – Required on **all** orders between £5k and £25k
- ✓ ESI Tool Result from HMRC – on **all** orders to an individual
- ✓ New Supplier form – Completed and signed by supplier on **all** new supplier requisitions
- ✓ Any correspondence that is relevant to the requirement that will allow Procurement to progress the order

How to raise a Requisition in Agresso

Requisitions – standard

This is the requisition type that should be used for the majority of requisition.

Log into Agresso and from the main screen click “Procurement” and “Requisition Standard”

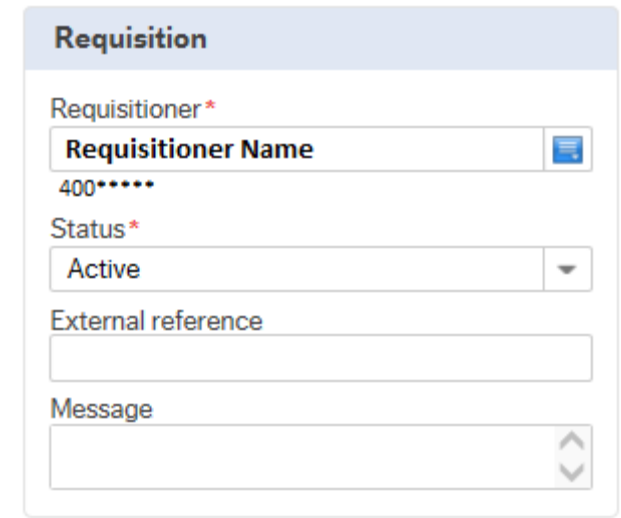


Requisitioner - will default to your name

Status – “Active” to insert the requisition into the workflow or “Parked” to stay with the requisitioner

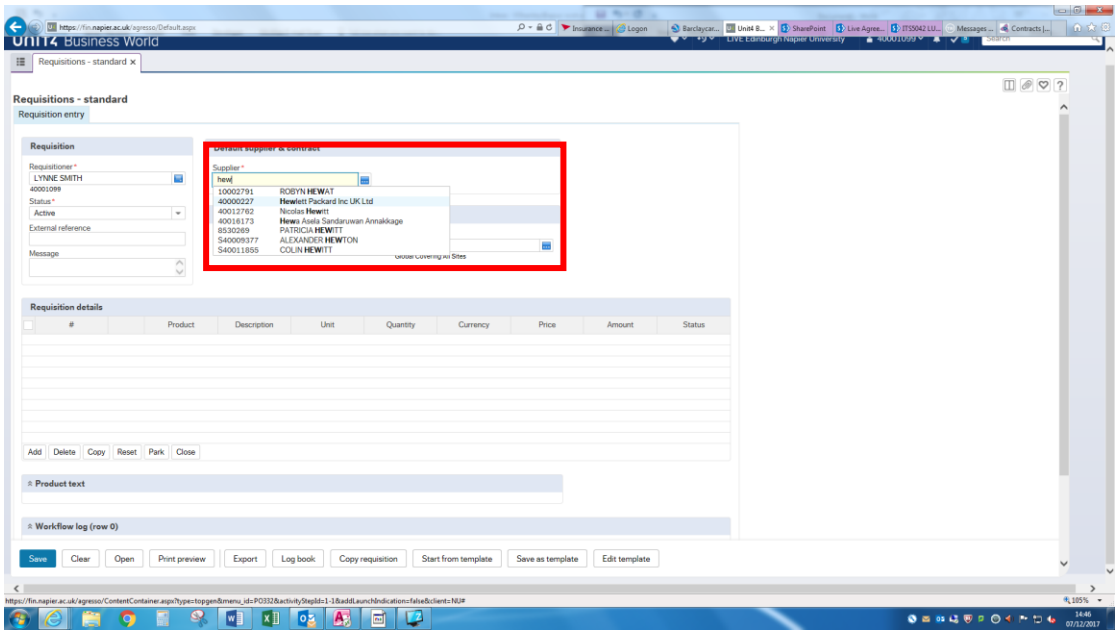
External Reference – This is a required field, this should be either the quote number or a reference relevant to the supplier

Message – This is an internal message to the authorisers

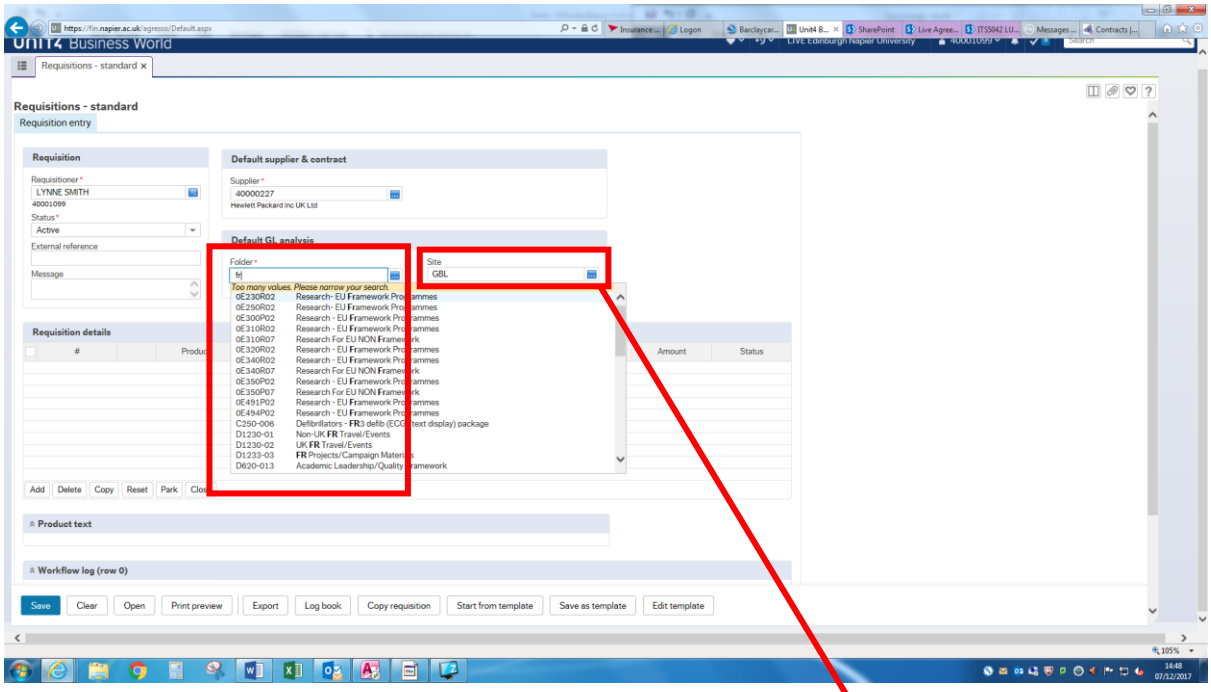


Start typing the supplier name and select the correct supplier

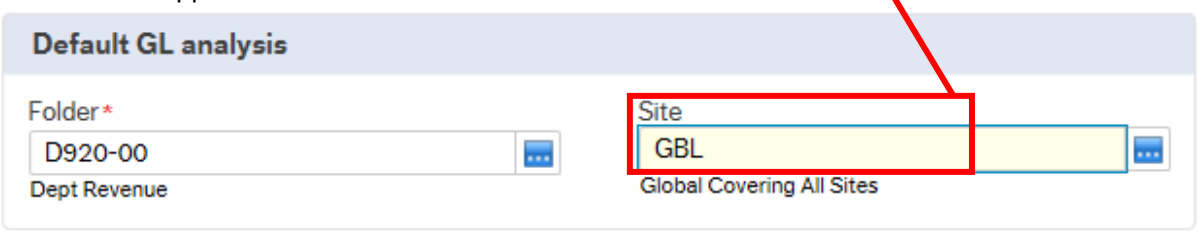
Note – Hewlett Packard is in the system as Hewlett Packard please do not select HP as this is a different supplier



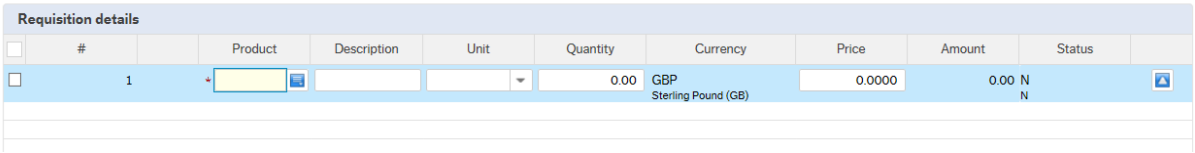
Start typing in the folder name or number to select the correct folder



Site – GBL is standard, if account code / product code starts with 2*** enter applicable site

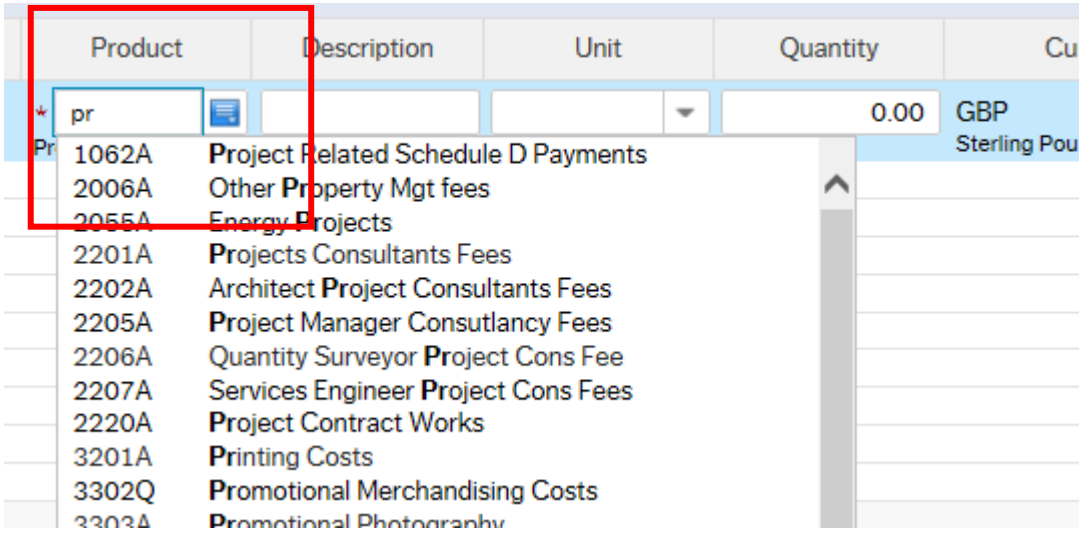


Click on 1st line to start creating your requisition, click on each subsequent line for new items

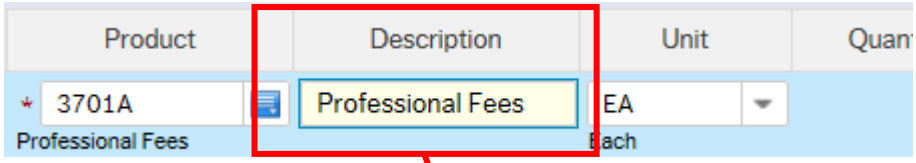


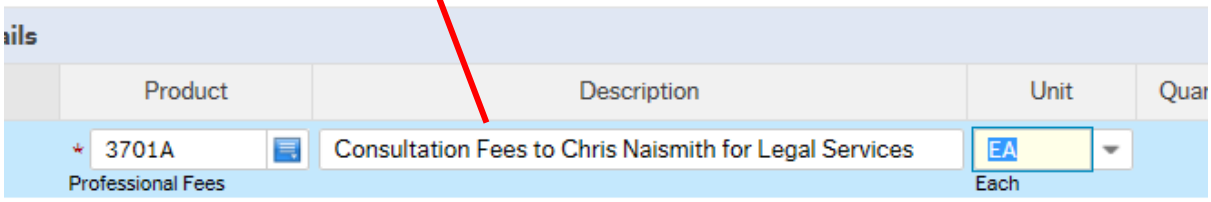
Enter the "Product" code by typing the requirement or if you know it the number.

Product Codes Ending with Q (Quantity) should be used where buying products with unit costs.
Product Codes ending with A (Amount) should be used where purchasing a service or for estimated orders.

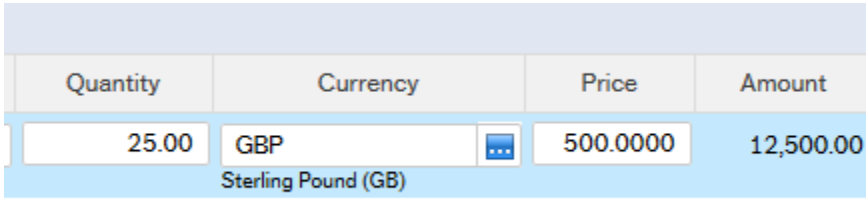


Update the "Description" to be specific to your purchase, failure to update this field will result in the requisition being returned by Procurement.

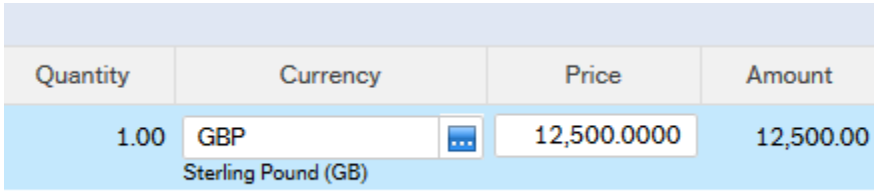




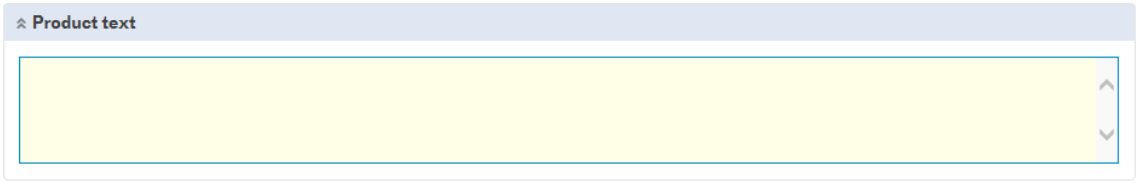
If you have raised a Quantity based Order, this should be the unit price per item, with the number of items selected.
Note – orders should be raised excluding VAT



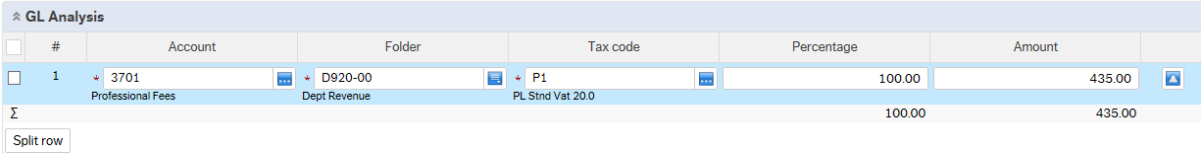
If it is and Amount based Order, you should input the total of the order.
Note – orders should be raised excluding VAT



Expanded "Product Text" is an external field and should be used for alternative delivery address (e.g. for Hewlett Packard PC Orders, who deliver direct to desk) or additional specification details

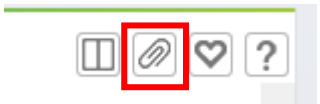


The GL Analysis information will pull through from each line of the requisition

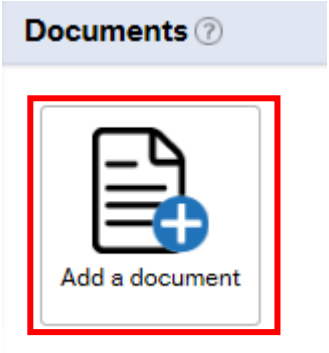


Please remember to attach documents to the requisition, failure to attach the required documents will result in the requisition being rejected by Procurement. See Page 1

In the top right hand corner click the paper clip

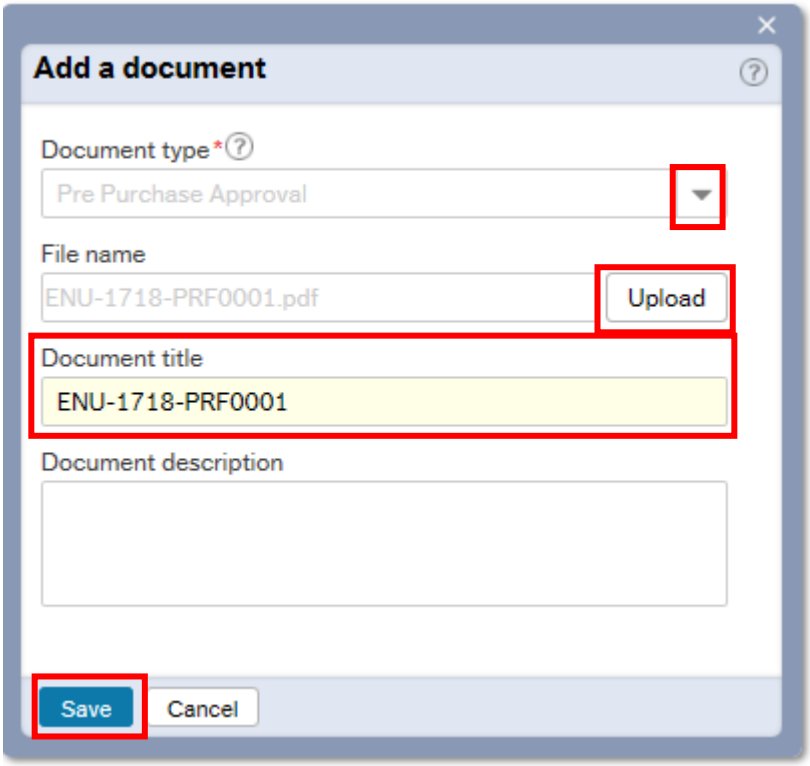


Click “Add a document”

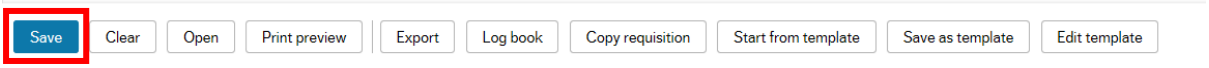


Select the document type from the dropdown, click “Upload” to select the document and enter a “Document Title”. Click “Save”

Note – If you are attaching an email please save this as a PDF first and then attach it to the requisition as the system doesn’t recognise the text in an email.

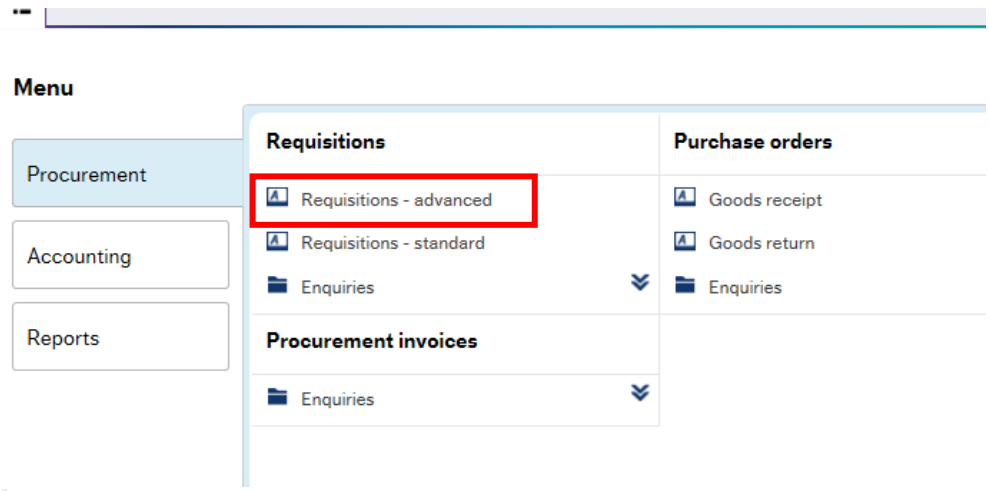


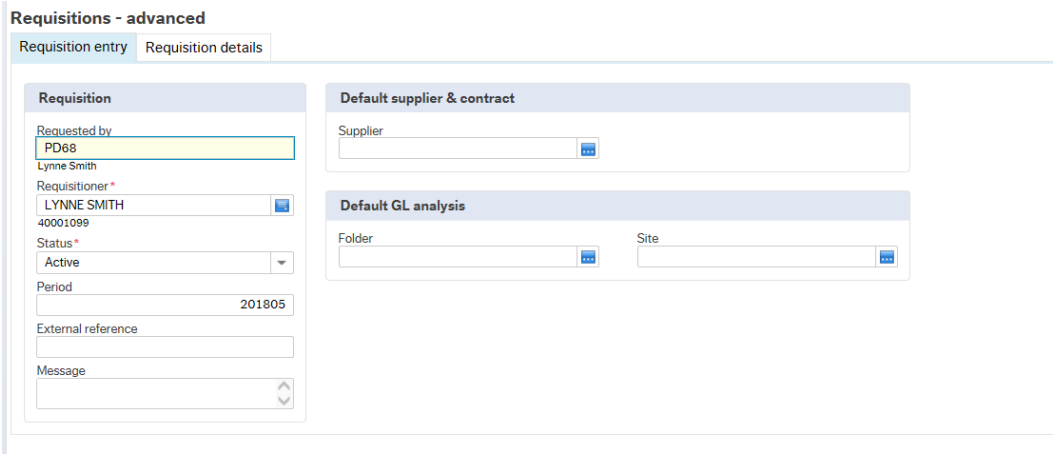
Click “Save” to submit to Procurement



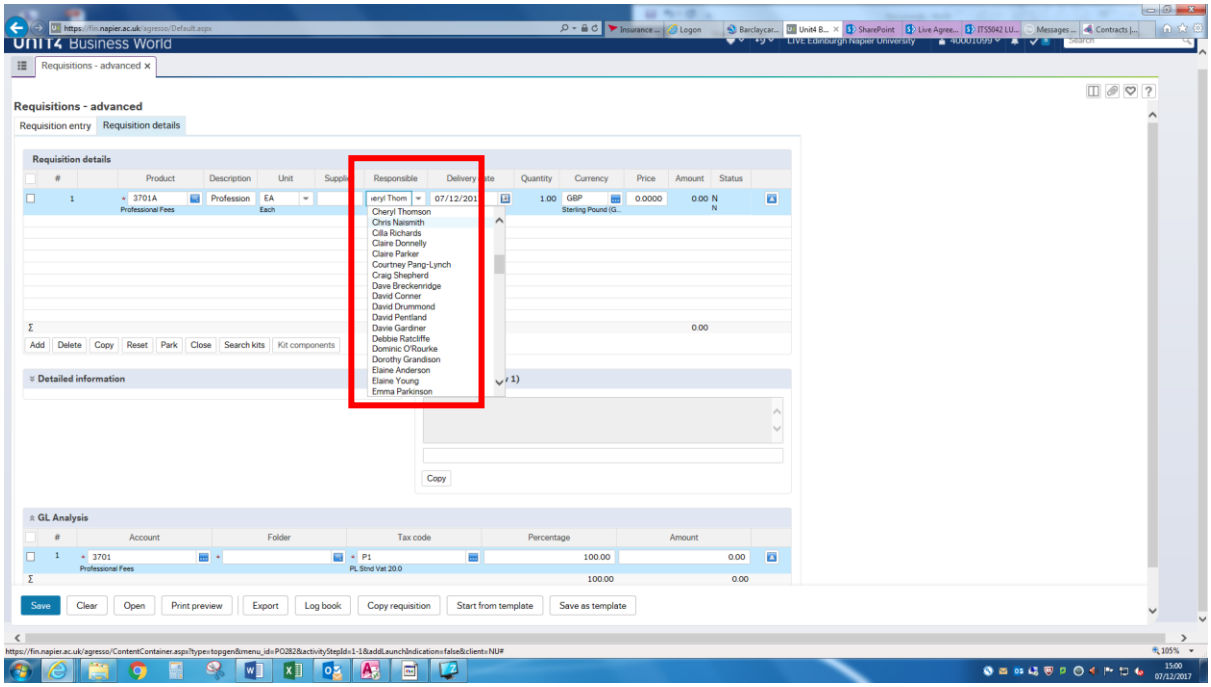
Requisitions – advanced

Only certain users, can raise orders to other folders out with users own department folders, process is the same as Requisitions – standard starting on Page 2



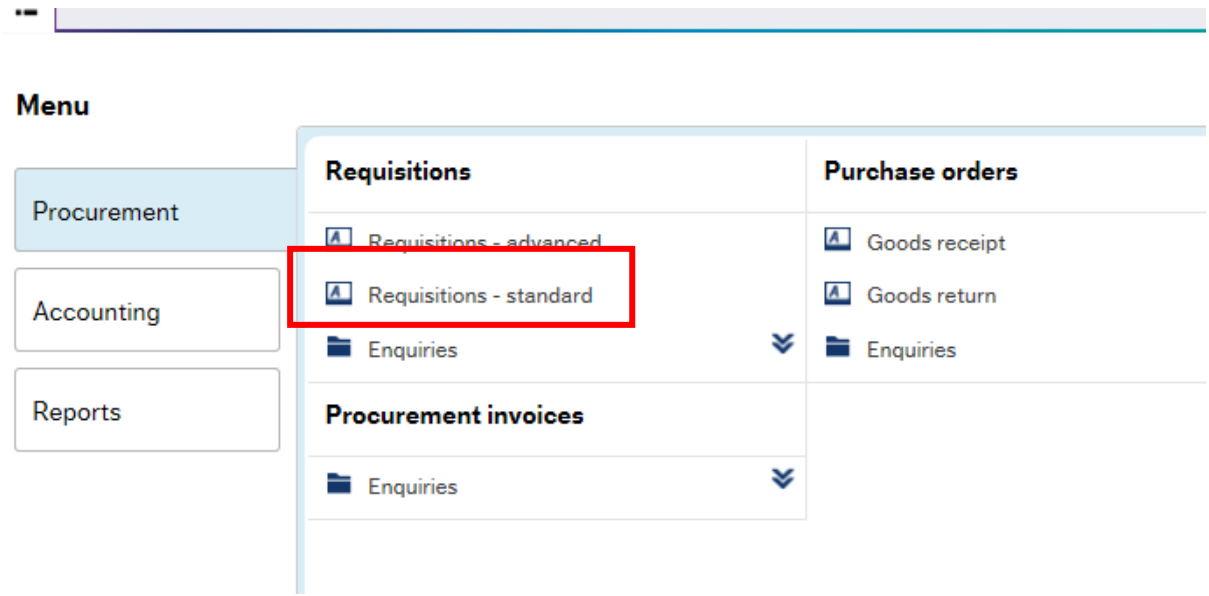


The only unique area is the requirement to complete the "Responsible" field with the person that has asked you to raise the requisition on their behalf. Start typing in the requester name

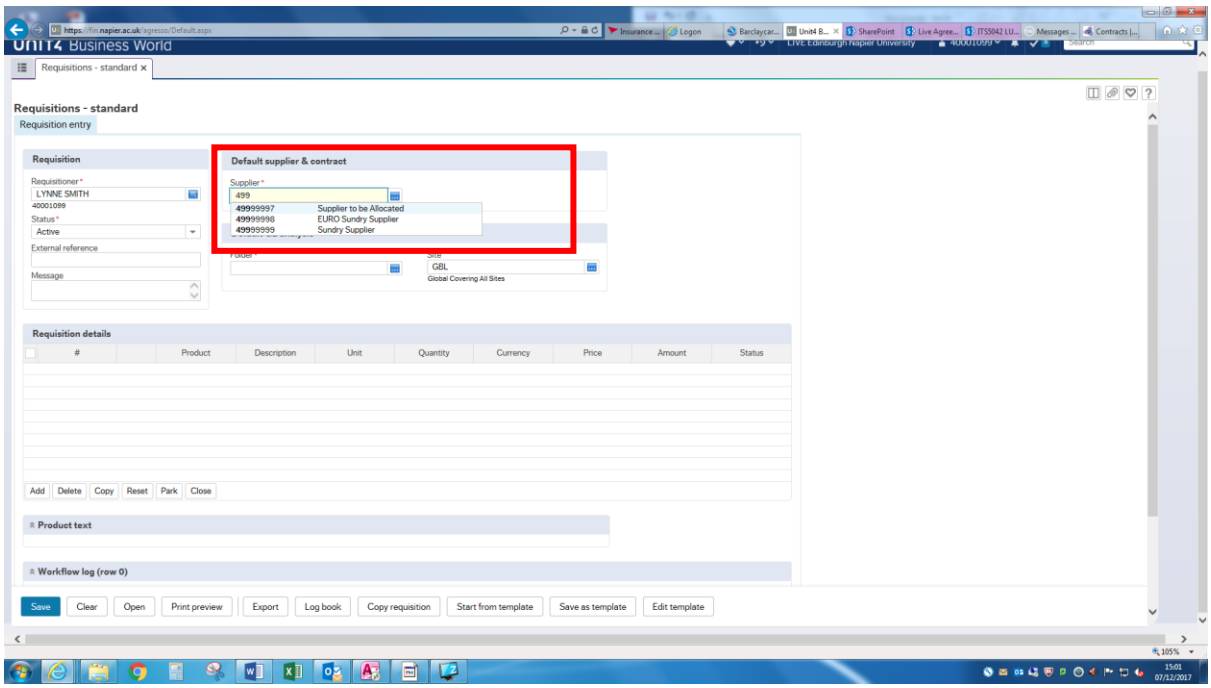


How to create a requisition for a new supplier

Click “Requisitions – standard”

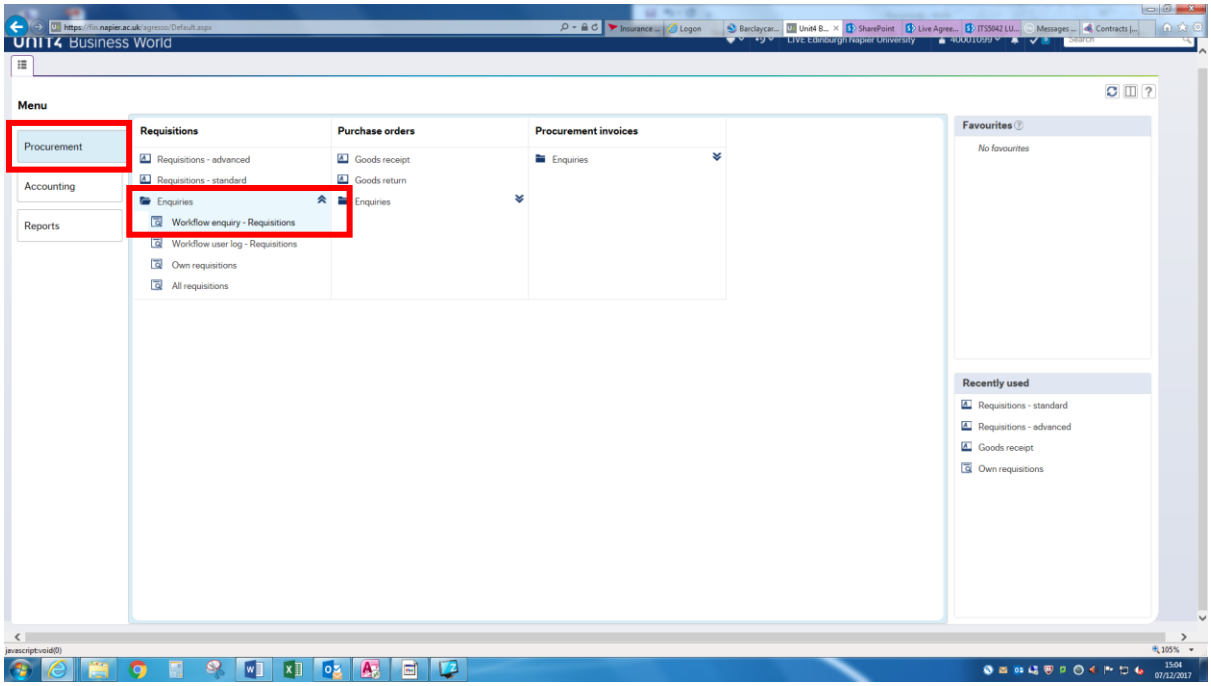


Enter either 49999997 or Supplier to be Allocated in the Supplier box

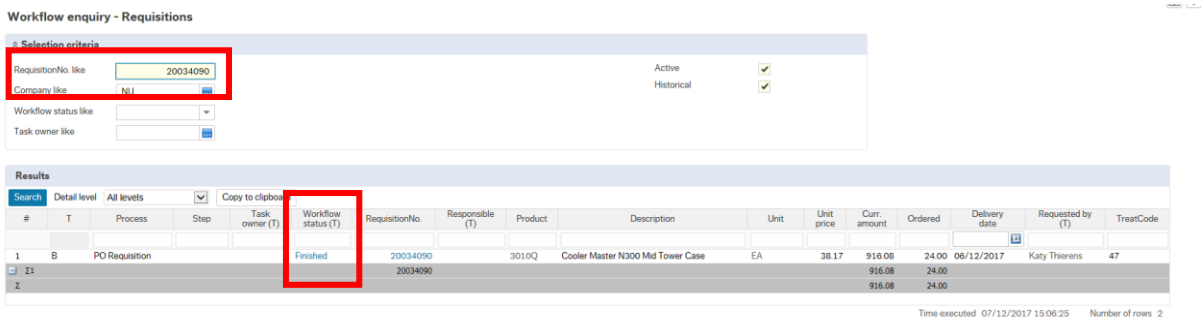


Where is my Purchase Order number?

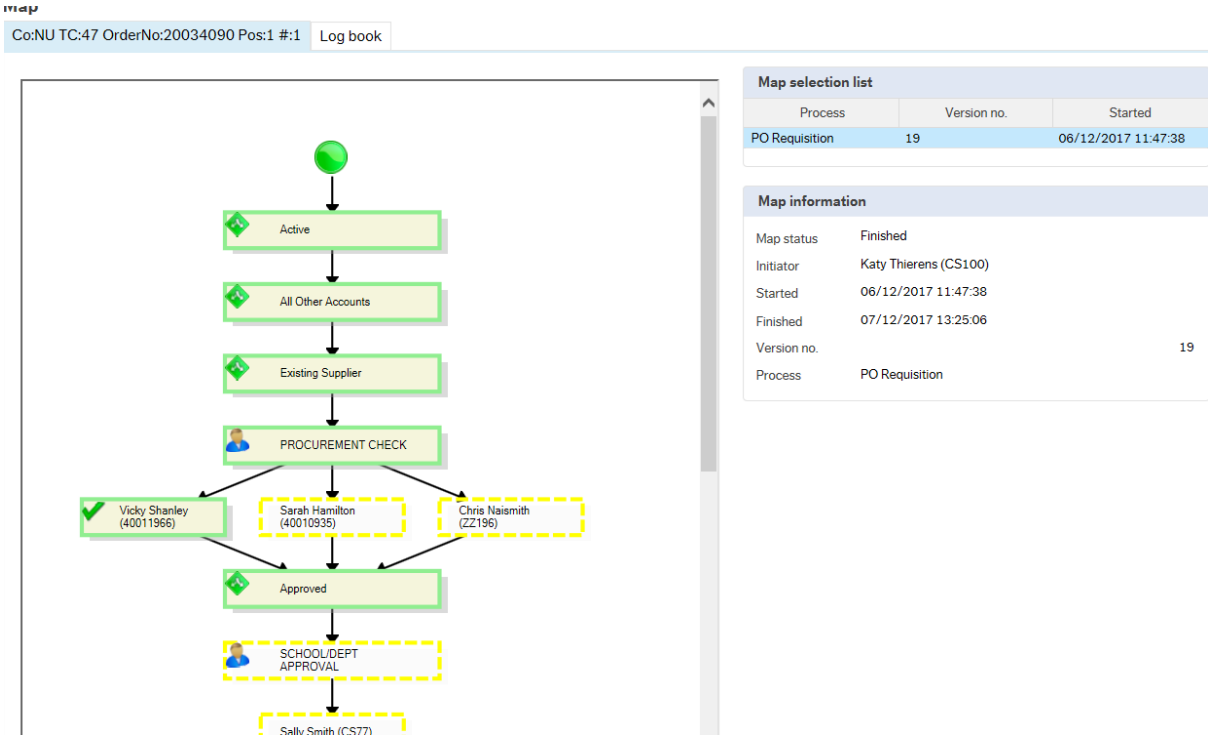
To find where your requisition is in the workflow click “Procurement” > “Enquiries” > “Workflow enquiry – Requisitions”



Enter the Requisition number and click on “Finished”



The map below will be shown, if there is a tick next to a name or there is a green box around the action the requisition has been moved onto the next stage.

In the example below the requisition has been approved by Procurement and is with the School / Department for Approval.

To move the requisition along to the next stage in the process please contact the person that the requisition is with.