**Note - Before you can place an order using Agresso you must complete the following steps:**

1. Undergo Agresso Web Requisitioning Training. More information, including details of how to sign up for a training session, is available at https://www.gla.ac.uk/myglasgow/agresso/informationforusers/trainingcourses/#agressowebrequisitioning

2. Fill out this form to let the finance team know which budget codes you intend to make purchases from – they will then allow you access to these budgets through Agresso https://www.gla.ac.uk/myglasgow/agresso/gettingstarted/applyingforaccess/apply/

3. Once you have completed the Agresso training and been granted access to spend from your budgets, you will be able to place orders using Agresso

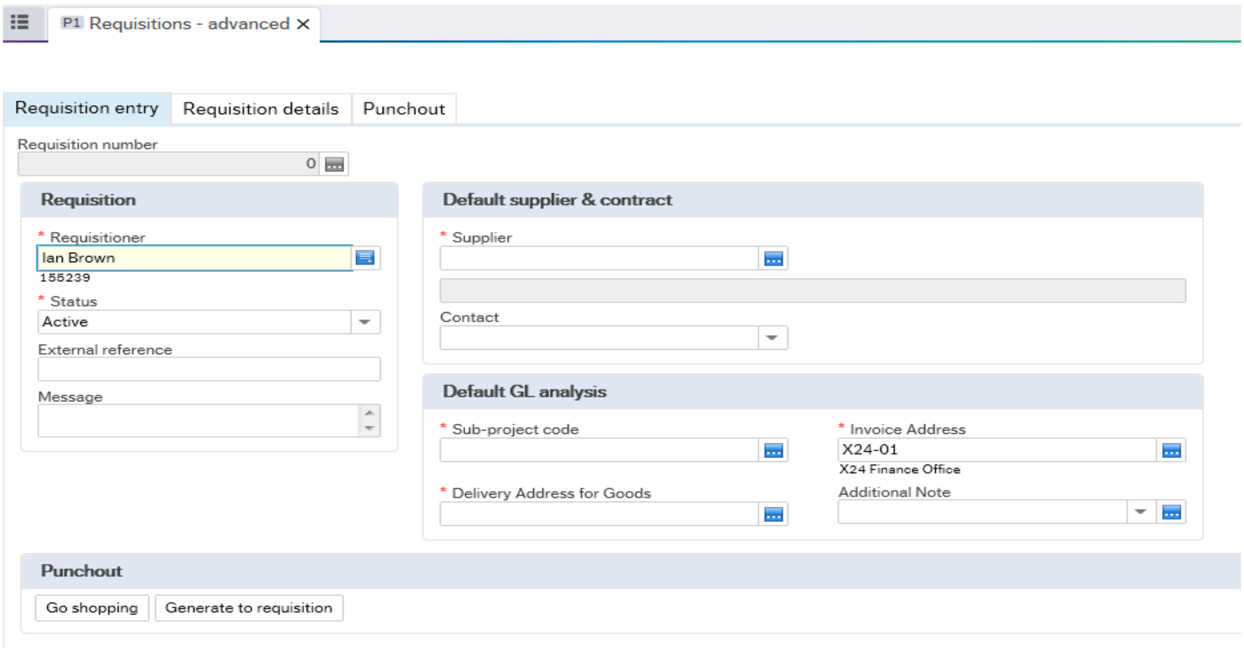
## WEBREQ7: Chemistry Stores - Requisitions Advanced

The purpose of this section is to introduce the user how to raise a Requisition via the Agresso Web for items within the Chemistry Stores. This Requisition will then follow an Approval workflow until it then becomes a Purchase Order, or, the Requisition is rejected.

## WEBREQ7.1: 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**

**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.

## WEBREQ7.2: 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.

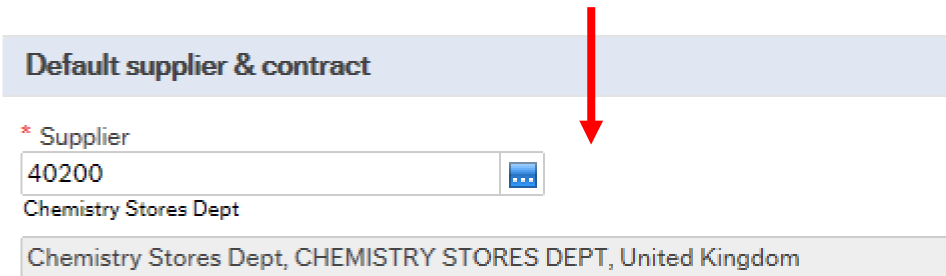
2. Requisitioner — This will automatically populate with the Staff ID and Name of the person raising the Requisition. This will appear on the Purchase Order as 'Our Reference'.

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 — 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, etc…
**N.B. Please note this will not appear on the E-procurement orders**

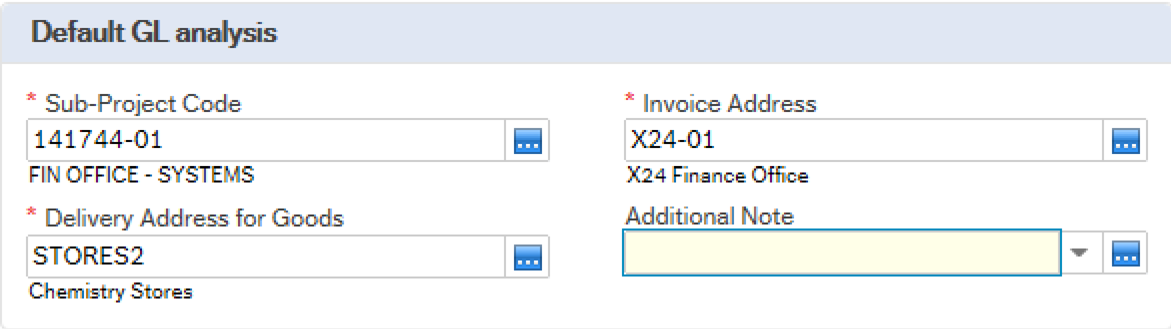
**5. Message** — **This field is optional and can be used to pass on information regarding the Requisition. This information will not be printed on the Purchase Order.**

**6. *Supplier ID** — **For CHEMISTRY STORES Supplier enter 40200**




**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.

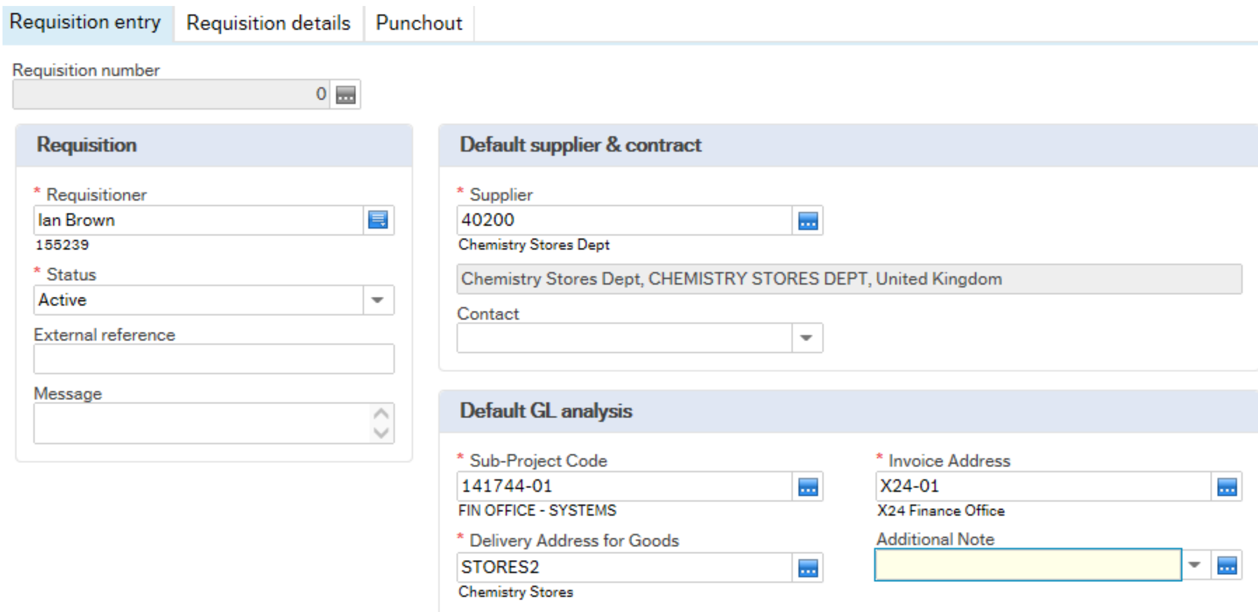



**10. *Delivery Address for Goods** ***For CHEMISTRY STORES enter Stores2***


**11. Additional Note**

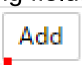
This field is optional and can be used to print extra information on the Purchase Order. Click on drop-down arrow to view the available options.

See an example of how screen could look:

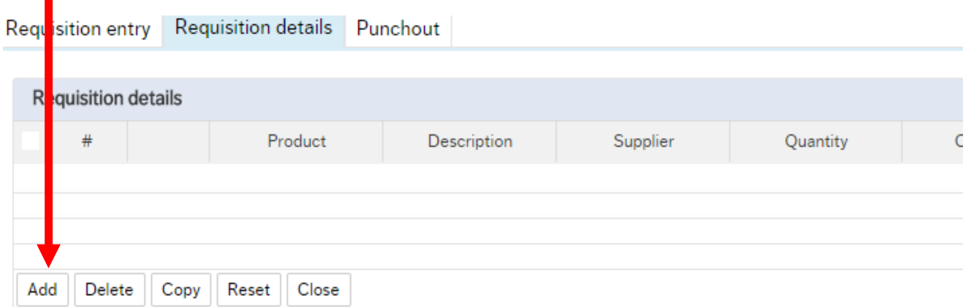



## WEBREQ7.3: Requisition Details Tab – Mandatory

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

**1. Select** 

**to add a row or click on row**



2. ***Product Code*** **Enter a Chemistry Product Code then press Tab on your keyboard.**
These can be found at the following webpage:
https://www.gla.ac.uk/media/Media_522980_smxx.xls

**3.** Description **The description will come from the product code selected.**

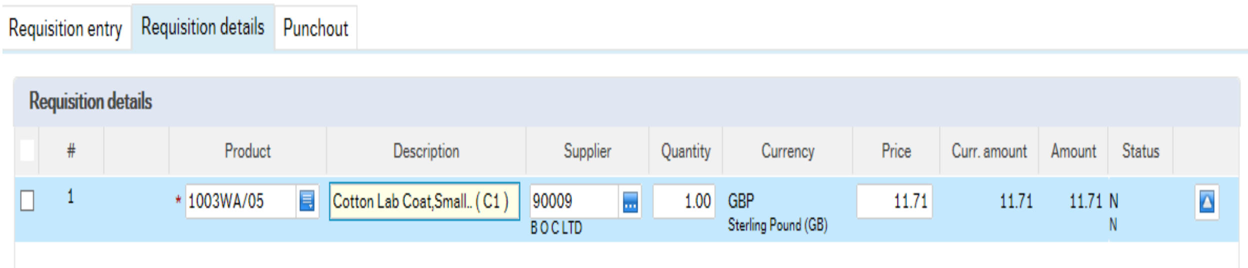
**4. Supplier ID** **This will automatically be populated with the Supplier ID.**

**5.** Quantity **Enter the number of goods required. This field must contain a quantity.**

**6. Currency** **The Currency is automatically added depending on the supplier used.**

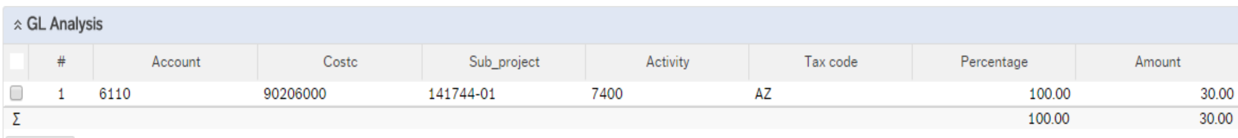
**7.** Price **The price is automatically added depending on the product code selected.**

**8. Amount** **This is the amount in GBP before VAT**




To add more rows go back up to **WEBREQ7.3. Step 1**

**9.** GL Analysis This will show where each row will be charged to.




10. Account The Account will automatically be selected from the Product Code to which the goods are to be charged.

11. Costc The Cost Centre to which the Sub_project belongs to.

12. Sub_project The Sub_project to which the goods are to be charged.

**13. Tax Code** **The Tax Code to be used for the goods** will automatically be selected depending on the Product Code**.**

**AS** Standard rated – 20.0% on purchases
**AE** Exempt on Purchases (e.g. education courses or conferences)
**AZ** Zero-rated goods (e.g. books)
**EF** Where a VAT 'exemption' certificate has been completed (Equipment used in Medical or Veterinary research, charity, advertising). *If using this code please ensure all the order lines are 'VAT' Exemption certificate, if not raise separate orders where lines are not VAT 'exemption' certificate*.
**EU** Foreign order (VAT not charged by supplier but may be charged later)
**A0** Outside the scope of vat. Should be used in the UK where the supplier is not vat registered or the supplier is a private individual and for some expenditure. Might also be used for Student Fees

**14. Percentage** **Percentage of the line to be charged to the Sub-project.**

**15. Amount** **Amount of the line to be charged to the Sub-project.**

## WEBREQ1.4: Splitting Costs per Sub-project

Certain Purchase Orders costs will be split between different Sub-projects. Agresso Web allows order lines to be split, on a percentage basis or amount, over different Sub-projects.

If you wish to split the costs over more than one Sub-project please follow the following instructions:

Click on the first line and enter the percentage of the line or the amount to be charged to the Sub-project.

GL Analysis

| # | Account | Costc | Sub_project | Activity | Tax code | Percentage | Amount |
|---|---|---|---|---|---|---|---|
| 1 | 6110 BOOKS | 90206000 US - Systems | * 141744-01 FIN OFFICE - SYSTEMS | 7400 General OH | AZ Purchases - 0% | 50.00 | 15.00 |
| 2 | 6110 | 90204000 | 141745-01 | 7400 | AZ | 50.00 | 15.00 |
| Σ | | | | | | 100.00 | 30.00 |

Delete Split row

Click on Split row **This will expand this option by adding another row**

Select the second row by clicking on it to enter the Sub-project for the next Sub-project for costs to be split accordingly. Enter the percentage of the line or the amount to be charged to the Sub-project. Select to update the changes made.

GL Analysis

| # | Account | Costc | Sub_project | Activity | Tax code | Percentage | Amount |
|---|---|---|---|---|---|---|---|
| 1 | 6110 | 90206000 | 141744-01 | 7400 | AZ | 50.00 | 15.00 |
| 2 | 6110 BOOKS | 90204000 US - Management Accounts | 141745-01 FIN OFFICE - MANAGEMENT ACCOUNTS | 7400 General OH | AZ Purchases - 0% | 0.00 | 15.00 |
| Σ | | | | | | 100.00 | 30.00 |

Delete Split row

The Total Percentage must equal 100, if not the Requisition will not save.

To keep on splitting costs by more than two Sub-projects select Split row to add more rows.

## WEBREQ1.5: Adding/Amending/Deleting Rows

To add a row select Add

Requisition details

| # | Product | Description | Supplier | Quantity | Currency | Price | Amount | Status |
|---|---|---|---|---|---|---|---|---|
| 1 | LIB2 | 12345 Training Books | 23490 | 2.00 | GBP | 15.00 | 30.00 | Active |
| 2 | * | | 23490 JOHN SMITH & SONS BOOKSELLERS | 0.00 | GBP Sterling Pound (GB) | 0.00 | 0.00 | N N |
| Σ | | | | | | | 30.00 | |

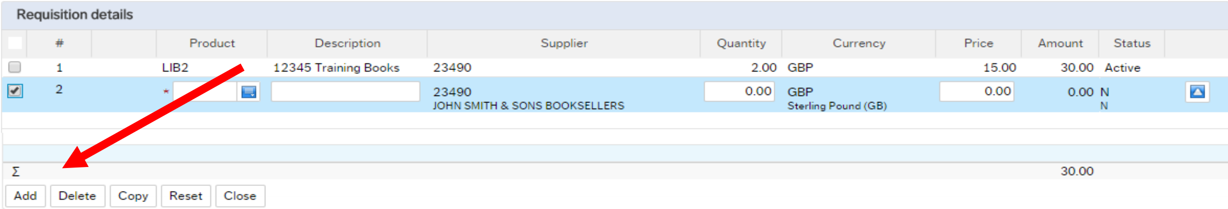
Add Delete Copy Reset Close

To amend a row click on the required row (should change colour).
Make the required changes then select to update the changes made

Requisition details

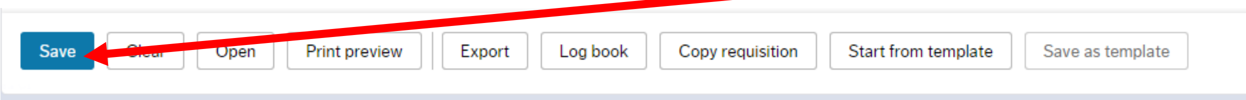
| # | Product | Description | Supplier | Quantity | Currency | Price | Amount | Status |
|---|---|---|---|---|---|---|---|---|
| 1 | LIB2 | 12345 Training Books | 23490 | 2.00 | GBP | 15.00 | 30.00 | Active |
| 2 | * LIB2 Books | More Books | 23490 JOHN SMITH & SONS BOOKSELLERS | 2.00 | GBP Sterling Pound (GB) | 10.00 | 20.00 | N N |

To Delete a row  the required row then Select 

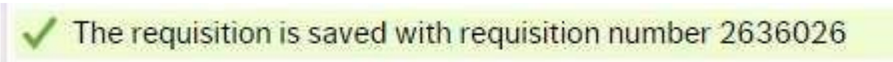




## WEBREQ1.6: Saving the Requisition

**To Save the Requisition Click on the Save button at the bottom of the screen** 


Once saved the user will get a requisition number. This will then go for approval.




The order will then be processed by Stores staff and you will get an email when your order is ready to collect.

Any errors see details and amend accordingly