

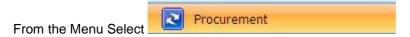
Section 2: Requisitions

The purpose of this section is to explain how to raise a Requisition via the Agresso Web. This Requisition will then follow an Approval workflow until it then becomes a Purchase Order, or, the Requisition is rejected and closed.

Once the Requisition has become a Purchase Order, and depending who the supplier is, it will be automatically emailed/faxed, or printed off and sent to the supplier. The Purchase Order will also record a commitment against the appropriate Cost Centre and Project until all items on the Purchase Order are allocated to the corresponding invoice, or, the Purchase Order is manually closed.

Section 2.1: Raising a Requisition

1. To access the Requisitioning screen:



Requisitioning
Requisition Entry – Advanced

The following screen will appear:

Requisition entry	Requisition details	Punchout					
Requisition number	0						
* Requisitioner External ref	Brov 1552	vn Ian 19	•	•	Status	Active	•
Message							*
* SupplierID					Contact		•
* Project code					* Invoice Address	X24-01 X24 Finance Office	
Faculty Reference Customer Ref					* Delivery Address for Goods Additional Note		
						Agresso Business World TPO001 IAN BRC	DWN P1

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

Requisition entry Requisition details Punchout

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

Section 2.1.1: Requisition Entry Tab – Mandatory

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



equisition										
quisitioner		rown Ian 5239	Y	Status		Active Active		~		
mal ref	Qu	uote 777				Closed Parked				
age	Tra	aining Materials				Template				
-								v		
1. Requisitior	n Number			ce all the Requisi been saved.	tion details ha	ave been	entere	d and th		
2. Requisition	er	raising th	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		Active – Closed – Parked – Template	The requ The Re The rec – The r	e Status of the Requisition is currently quisition has been quisition has been equisition is used equisition has been	being raised manually close parked – Will for templates.	sed not go to	be appı			
4. External R	ef			tional and will b chase Order. En			mation	that yo		
		would li	ike to a	appear on the l per reference/ nu		-	quote	numbe		
5. Message		would li supplier	ike to a custom	appear on the l per reference/ nui	mber/contact	, etc				
5. Message		would li supplier This fie	ike to a custom Id is o g the R	appear on the l ler reference/ nul ptional and car equisition. This	mber/contact n be used t	, etc	on inf	ormatic		
)	would li supplier This fie regardin Purchas <u>Either, e</u>	ike to a custom Id is o g the R e Order nter in t	appear on the l ler reference/ nul ptional and car equisition. This	mber/contact	, etc o pass will not b	on inf e printe	ormatic ed on th		
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6. Supplier ID	arch Criter	would li supplier This fie regardin Purchas <i>Either,</i> e search s	ike to a custom Id is o g the R e Order nter in t creen: ame of ro	appear on the l per reference/ nui ptional and car equisition. This he Supplier ID re equired Supplier.	mber/contact h be used to information h equired or click Then click on	, etc o pass will not b ck on ck on	on inf e printe to ope	ormatic ed on th en the		
6. Supplier ID In the Sea The resul Supplier I	arch Criter Its will ap	would li supplier This fie regardin Purchas <i>Either,</i> e search s	ike to a custom Id is o g the Ro e Order nter in t creen: ame of ro Click onc	appear on the later reference/ num ptional and car equisition. This the Supplier ID re equired Supplier.	mber/contact h be used to information h equired or click Then click on	, etc o pass will not b ck on ck on	on inf e printe to ope	ormatic ed on th n the pulate th		
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6. Supplier IC In the Sea The resul Supplier I d help tearch criteria	arch Criter Its will ap D field an	would li supplier This fie regardin Purchas <i>Either,</i> e search s ria enter the na pear below. C d close the sea	ike to a custom Id is o g the Re e Order Inter in t creen: ame of re Click once	appear on the later reference/ numer reference/ numer reference/ numer equisition. This with the Supplier ID reference on the required supplier.	mber/contact	, etc o pass will not be ck on ck on Search	on inf e printe to ope	ormatic ed on the en the pulate the		
6. Supplier ID In the Sea The resul Supplier I d help search criteria seaddrid Advanced	arch Criter Its will ap D field and	would li supplier This fie regardin Purchas <i>Either,</i> e search s ria enter the na pear below. C d close the sea	Id is o g the Rige Order of th	Appear on the later reference/ numer reference/ numer reference/ numer equisitional and care equisition. This whe Supplier ID reference on the required Supplier.	mber/contact h be used to information h equired or click Then click on	, etc o pass will not be ck on ck on Search hich will th	on inf e printe to ope	ormatic ed on th en the pulate th		
6. Supplier IE In the Sea The resul Supplier II d help tearch criteria teaddrid Advanced earch is Supplier gr 3 Exclude PO from Aut	arch Criter Its will ap D field an oup (1) omatic Distribut	would li supplier This fie regardin Purchas <i>Either,</i> e search s ria enter the na pear below. C d close the sea	Id is o g the Rige Order nter in t creen: ame of re click once arch screens Short name SIGMAALDRI	Address	mber/contact n be used to information v equired or click Then click on Chen click on C	, etc o pass will not be ck on ck on	on inf e printe to ope	ormatic ed on the oulate the		
6. Supplier ID	reup (T) omatic Distribut omatic Distribut omatic Distribut omatic Distribut	would li supplier This fie regardin Purchas <i>Either,</i> e search s ria enter the na pear below. C d close the sea	Id is o g the R e Order nter in t creen: ame of ro Click once arch scre SIGMALDRI SIGMALDRI SIGMALDRI SIGMALDRI	Address THE OLD BRICKYARD CHIMIE SARL Fancy Read INDUSTRIESTRASSE 25	mber/contact n be used to information value equired or click Then click on Supplier, wh Bupplier, study PostalNo Place SP8 4XT SILINGHAM BH12 4QH POOLE CH-9471	, etc o pass will not be ck on ck on	on inf e printe to ope	ormatic ed on th n the oulate th		
6. Supplier ID In the Sea The resul Supplier I d help search criteria seaddrid Advanced ID Supplier gr 3 Exclude PO from Aut 3 Exclude PO from Aut	roup (T) omatic Distribut omatic Distribut omatic Distribut omatic Distribut omatic Distribut	would li supplier This fie regardin Purchas <i>Either,</i> e search s ria enter the na pear below. C d close the sea	Short name SIGMALDRI SIGMALDRI SIGMALDRI SIGMALDRI SIGMALDRI SIGMALDRI	Appear on the later reference/ num ptional and car equisition. This the Supplier ID re equired Supplier. the on the requirer een. Address THE OLD BRICKYARD CHIME SARL Fancy Road INDUSTRIESTRASSE 25 HOMEFIELD BUSINESS PARK	mber/contact n be used to information value equired or clic Then click on Bupplier, wh PostalNo Place SP8 4XT BH12 4QH POOLE	, etc o pass will not be ck on ck on	on infee printe	ormatic ed on th n the oulate th		

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

 Default 	
* SupplierID	13873
	SIGMA-ALDRICH CO LTD
SIGMA-ALDRICH CO LTD, THE OLD BRICK	



7. Contact		is to b	on the drop-down be sent. If there as for the supplie	is only one lir				
			a new address is	selected the se	elected addre	ss will be	seen	on
* SupplierID	4	the sci 13873 SIGMA-ALDRICH C		Contact	[ANCY ROAD		-
SIGMA-ALDRICH CO LTE), Fancy R	oad, B						
8. Project Cod		Enter	the a project co	le that costs of	the nurchas	o will he a	lloca	ated
			the a project country of the space of the sp					
nc re <u>NI</u>			r requisition is a e Facref can be e ed goods. <u>nis field is only u</u> e them you do ne	entered at a late	er stage agair c Schools. If	nst each lin	e of	the
10. Invoice Ad	dress		s the address t atically default to t					will
In the Sea	rch Cr	which click o <i>N.B. 1</i> iteria field ente	Either enter the the goods to be the goods to be the to open see the full address of the full address of the required Sch	e sent (e.g. X24 arch screen: vill be printed o ool name e.g Fi	-01, Finance <i>n the purcha</i> s nance Office.	Office) or se order.	<mark>click</mark>	<mark>a on</mark>
			Click once on the field and close th			n will then	popu	late
	, y 7 (at							
Field help								×
— Search cheria —								
finance								
Advanced]
Search								
Attr.value		Attribute	Desc	ription	Per from	Per to	S	
								Filter
300-01		Y ADD	300 Accounting and Finance		0			
40101-01 40299-02		RY ADD RY ADD	Accounting & Finance Finance & Infrastructure		(
40299-02 40301-01		RY ADD RY ADD	Crichton - Finance					
40301-01 90201-01		RY ADD	Finance - Directorate		(
90202-01		RY ADD	Finance - Procurement		(
90202-01		RY ADD	Finance - Procurement		(
90203-01		RY ADD	Finance - Payroll Finance - Mgmt Accounts		(
90205-01		RY ADD	Finance - General Ledger		(
			a second a second a second as					

For a more advanced Supplier search use the Revealed - option

Finance - Cash

|< < 123 > >|

90205-02

DELIVERY ADD

209999 N

0



12. Customer Ref	If your requisition is all against one Customer Ref, it can be entered here. If not the Facref can be entered at a later stage against each line of the required goods. <u>NB: This field is only used by specific School. If your School does not use them you do not need to fill out this field.</u> <u>Click on</u> <u>to open</u> <u>search screen to find relevant</u>
13. Additional Note	This field is optional and can be used to print extra information on the

Purchase Order. Click on 🚾 to open search screen, Click on 🖾 Search to see available options

See an example of how screen could look:

Requisition entry	Requisition details	Punchout			
Requisition number	0				
* Requisitioner	Brov 15523	vn Ian 9	T	Status	Active 🔻
External ref					
Message					× ▼
- Default					
* SupplierID	1387 SIGM	73 A-ALDRICH CO LTD		Contact	FANCY ROAD 🔻
SIGMA-ALDRICH CO L	TD, Fancy Road, B				
* Project code	4174 FIN 0	14 DFFICE - SYSTEMS		* Invoice Address	X24-01
Faculty Reference				* Delivery Address for Goods	90206-01
Customer Ref				Additional Note	



Section 2.1.2: Requisition Details Tab – Mandatory

Requisition Details

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

Product Code This field can be used in three different ways:

- 1. Enter the Suppliers Product/Catalogue Code. For some of the suppliers that the University of Glasgow has a contract with, their product codes for agreed items are on Agresso E.g. VWR, Adecco, Invitrogen, etc...
- 2. Enter a Generic Product Code. These are used when there are no Supplier specific product codes/catalogue codes on Agresso.

See website for more info on generic product codes: <u>http://www.gla.ac.uk/services/finance/staff/ssd/cfs/appsuppliers.htm</u>

3. **To search for Product Codes click on** .

In the Product Search Criteria field enter the name of required product. Click on <u> Search</u>

The results will appear below. Click once on the required Product, which will then populate the Product Code field and close the search screen.

Field h	elp											
— Sear	ch criteria											
stapler												
🕑 Adv												
Product	Description		Prod. grp	Prod. grp (T)	Unit	Contract	Contract (T)	SuppID	SuppID (T)	Warehouse	Location	Status
0164123	Stapler Full Strip Metal Black		STA5	General Stationery	ONE							N
0357385	Rexel Gazelle Stapler Black/Blac	ck	STA5	General Stationery	ONE							N
1518379	IMPEGA BLACK NO. 10 POCKET	STAPLER -	STA1	Office Equipment-maintenance	ONE							N
2313110	Rapesco HD29 Heavy Duty Sta	apler	STA5	General Stationery	ONE							N
2787557	REXEL BEASTI MINI STAPLER -	10 SHEE	STA1	Office Equipment-maintenance	ONE							N
2790605	REXEL MATADOR HALF STRIP	STAPLER -	STA1	Office Equipment-maintenance	ONE							N
3047637	RAPID 5020E ELECTRONIC ST	APLER - 20	STA5	General Stationery	ONE							N
3047659	REXEL ECLIPSE 12 ELECTRIC S	TAPLER	STA1	Office Equipment-maintenance	ONE							N
	REXEL STELLA 70 ELECTRIC ST	APLER -	STA1	Office Equipment-maintenance	ONE							N
3047683	DEVEL ODVOCEVUE AND DUEV	STADLED -	STA5	General Stationery	ONE							N
	REXEL ODYSSEY HEAVY DUTY S	DI AFLER F	01140									

4. Description	The description must only be changed when a Generic Product Code is used.
•	The description can be changed to something more appropriate to match the
	goods required. This field only has 255 characters. See adding further text in
	step_Step 17.
	WE RECOMMEND ENTERING BOTH THE SUPPLIER'S CATALOGUE CODE
	AND A DESCRIPTION IN THIS FIELD.
	PLEASE NOTE - THE INFORMATION ON THIS FIELD IS ALSO PRINTED ON
	THE PURCHASE ORDER
	The information in the Description Field per row is used when an invoice is
	automatically matched to the order and will be seen against the transaction details
	r enquiries and reporting purposes.
5. Supplier ID	This will automatically be populated when the Supplier was selected in the
	Requisition Entry Tab. Do not amend.



7. Number	Enter the number of goods required
8. Currency	If not already specified enter the Currency Code (defaults to GBP) for the goods.
9. Price	If not already specified enter the unit price (cost per unit) for the goods

Curr. Amount This is the amount in the selected currency

Amount This is the amount in GBP

Requisition numbe — Requisition		0									
Produc	t E	Description	SupplierID	0	Qty,	Currency	Price	Curr. amount	Amount	Status	
* 025515	Sellotape Origin	nal Clear Tape 19mm	* 12052 SUPPLIES TEAM	*	10.00 *	GEP 🔜 *	0.49	4.90	4.90	Active	
🕂 Add 🔣 Dele	te 🔲 Reset 🔀 Clos	se 🔛 Search produ	cts 🔣 Search kits 🔚 Comp	ponents to a	kit						
 ➡ Add ▲ Dele ☑ Detailed inf ③ GL Analysis 	ormation	se 🔛 Search produ	cts 🔝 Search kits 🗐 Comp	oonents to a	kit						
Detailed inf	ormation	se 💽 Search produ	rts 💽 Search kits 🗐 Comp	Facref	Activity	TC		TS Percer	itage A	Amount	
 Detailed infi GL Analysis 	prmation				Activity	TC	A4		itage A	Amount 4,90	

- 10. Account The Account will automatically be selected from the Product Code to which the goods are to be charged. Do not amend.
- 11. Costc The Cost Centre will be back filled when the Project is entered.
- 12. Project If not already specified enter the Project to which the goods are to be charged.

13. Tax Code If not already specified enter the Tax Code to be used for the goods.

- AS Standard rated 15.0% 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 or 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 like also be used for Student Fees
- 14. Percentage Percentage of the line to be charged to the project.
- 15. Amount Amount of the line to be charged to the project.

16. Workflow log To enter a comment for the approver to view please enter a comment in the available field. If this comment is to be repeated for all rows enter all rows, then enter copy and select Copy

Сору

2.1.2.1 ADDING IN MORE DESCRIPTION TO ORDER ROWS



If a larger description or more information is required it can be added to each line of the order line

17. Click on 📝 Detailed	information and this will	l expand this option. This icon	🕙 <mark>will minimize it.</mark>
Detailed information SupplierID	13873		
Supplier product Warehouse	LAB13	Supplier product description	Conventional Animals
Product text	ENTER MORE DECRIPTION HERE		A V

18. Enter the additional description or information in the product text field. This information will appear on the Purchase Order.

2.1.2.2 ADDING/AMENDING/DELETING ROWS

19. Each time a new row is required Select 🖬 Add and a new row will appear

~ •	Poquio	ition dotaile								
	Status	Product	Description	SupplierID	Number	Cur	Price	Curr. amount	Amount	
	Normal	0522586	Supplies Team Roller	SUPPLIES TEAM	10.00	GBP	6.68	66.80	66.80	
	Normal	?		12052	0.00	GBP	0.00	0.00	0.00	\checkmark
				SUPPLIES TEAM						
Σ									66.80	
÷4	Add 🔀	Delete 🔠 Searc	th products							

20. To amend a row Click on the required row (should change colour). Make the required changes then select in the update the changes made.

		Requis	ition details —									
		Status	Product	Description	SupplierID		Number	Cur	Price	Curr. amount	Amount	
		Normal	0522586	Supplies Team Roller	SUPPLIES TEAM		10.00	GBP	6.68	66.80	66.80	
_		Normal	STA5	Pens	12052	?	5.00	GBP	4.50	22.50	22.50	
	_				SUPPLIES TEAM							
	Σ										89.30	
	Add E Delete Search products											

21. To delete a row tick 🔣 the required row then Select 🗵 Delete

- 🛲 Requis	tion details —											
Status	Product	Description	SupplierID	Number	Cur	Price	Curr. amount	Amount				
🗹 Normal	0522586	Supplies Team Roller	SUPPLIES TEAM	10.00	GBP	6.68	66.80	66.80				
🗆 Normal	STA5	Pens	SUPPLIES TEAM	10.00	GBP	6.68	66.80	66.80				
Σ 133.60												
🗄 Add 🔣	🛨 Add 🔀 Delete 🔛 Search products											

2.1.2.3 SPLITTING COSTS PER PROJECT



Certain Purchase Orders costs will be split between different Projects. Agresso Web allows order lines to be split, on a percentage basis or amount, over different General Ledger Codes. If you wish to split the costs over more than one project:

22. Click on split and this will expand this option by adding another row.

Click on the first line and amend the GL coding (Account/Project/Tax Code) accordingly. Enter and the percentage of the line or the amount to be charged to the project. Select 🖾 to update the changes made.

	0	έL	Analysis										
		#	Account	Costc		Project	Facref A	Activity	TC		TS	Percentage	Amount
۲	1		* 7170	 X0205700	41744		 740	00	AS	🚾 A4		50.00	2.45 🔽
			Stationery and Office Supplies		FIN OFFI	ICE - SYSTEMS			Purchases - 15%				
		2	7170	80101700	22011		740	00	AS	A4		0.00	0.00
	Σ											50.00	2.45

23. Select the second row by clicking on it to enter the GL coding (Account/Project/Tax Code) for the next project for costs to be split accordingly. Enter the percentage of the line or the amount to be charged to the project. Select is to update the changes made.

🔿 GL	Analysis ——									
#	Account	Costc	Project	Facref	Activity		ТС	TS	Percentage	Amount
1	7170	X0205700	41744		7400	AS		A4	50.00	2.45
2	* 7170	X0200700	14564	 	7400	AS		A4	50.00	2.45 🗸
			FINANCE OFFICE - DIRECTORATE							
Σ									100.00	4.90

NB. To keep on splitting costs by more than two projects follow Step 22, the Total Percentage must equal 100. If nor Requisition will not save.

Section 2.1.3: Saving the Requisition

1. Once all the details for the Requisition have been entered the user can then Save 🔚 Save the Requisition.

Once saved the user will get a requisition number.

The requisition is saved with requisition number 2005773									
Requisition entry	Requisition details								
Requisition number	2005773								

Once saved the Requisition will then follow a workflow to the approval process until it then becomes a Purchase Order, or, the Requisition is rejected.

2. Any errors see details (Select Click to see them all) and amend accordingly:

Your changes were NOT saved! Please correct the errors and try again.									
List of validation errors:									
Tab	Section	Field	Error						
Requisition entry	Default	Delivery Address for Goods	Value cannot be blank.						
Hide this list.									

Section 2.1.4: Product Search Optional



The Product Search button allows the user to search for Products to be used when ordering goods. Once the Products have been located the user can select the required products and Agresso Web will automatically transfer them to the Requisition Details Tab (See Step 2.12).

- 1. Click on Search products
- 2. In the Free Text field enter a description of the product required. e.g. *sellotape*.
- 3. Then Click on Find products and a list of products will appear.

Search products										
Free text	sellotape									
Advanced										
Find product	s									
 Search resi 										
Product	Product description	Supplier name	Unit	Currency	Price	Product group	Contract	Date limit		
TA.D2+	SELLOTAPE DISPENSER SMALL /1	SUPPLIES TEAM	PUN	GBP	3.44	STA5				
718647	SELLOTAPE SELF-ADHESIVE STICKY FOAM		ONE	GBP	0.83	STA5				
718693	SELLOTAPE DRAFTING TAPE - 25MM X 50		ONE	GBP	2.80	STA5				
2547377	Sellotape Original Tape 25mm x 33m		ONE	GBP	0.68	STA5				
0523091	Sellotape Buff Packing Tape 50mmx66		ONE	GBP	1.15	STA5				
719481	SELLOTAPE CASE SEALING TAPE 50MM X		ONE	GBP	1.61	STA5				
718671	SELLOTAPE DOUBLE-SIDED TISSUE TAPE		ONE	GBP	1.10	STA5				
2291131	Sellotape Hook & Loop Hook Spots Pa		ONE	GBP	1.19	STA5				
025515	Sellotape Original Clear Tape 19mm		ONE	GBP	0.43	STA5				
3052842	Sellotape Hook & Loop, Loop Spots P		ONE	GBP	22.56	STA5				
Add selected products Image: Construction of the selected products										

4. Tick I the products that are required for the Requisition and Select Add selected products. This will then transfer the selected products to the Requisition Details Tab (See Step 2.1.2)

5. For advanced search select Advanced and this will give the user additional fields to search with.

 Advanced 			
Supplier			
Contract			
Product group	~		
Relation	~	Value	

6. Supplier Select a Supplier to Search with

- 7. Contract NOT USED
- 8. Product Group Can be helpful when looking for Generic Product Group or related products
- 9. Relation Should be used for Schools who have a store room (FBLS, Chemistry) Select WAREH from drop down menu. Enter WAREH Value in Value field. I.e. PHSC for Chemistry, IBLS for Life Sciences

10. Then Click on Find products and a list of products will appear.

Tick
^I the products that are required for the Requisition and Select ^I Add selected products.</sup> This will then transfer the selected products to the Requisition Details Tab (See Step 2.1.2).