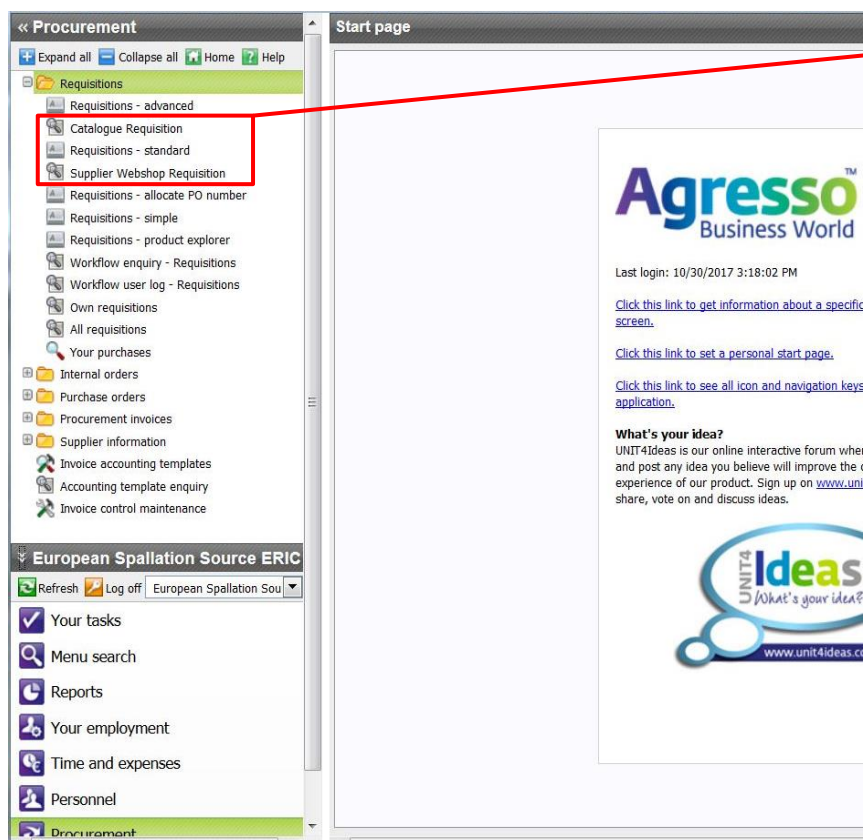


PROCUREMENT REQUISITIONS IN AGRESSO

1. PROCUREMENT REQUISITIONS IN AGRESSO



Three procurement requisitions available in Agresso:

- Catalogue Requisition,
- Requisitions – standard,
- Supplier Webshop Requisition.

Preparation and submission of procurement requisitions shall take in consideration ESS Guidelines for Procurement (ESS-0092678).

These requisitions are subject to approval by relevant authorities according to the spending limits provided by the Authorisation and Delegation Plan (ESS-0027645).

Contracting and purchasing following these requisitions are subject to the [ESS Procurement Rules](#).

2. SUBMISSION OF CATALOGUE REQUISITIONS

Requisition entry

Requisition
 * Requisitioner: Ortega, Luis
 10365
 Transaction text:
 Requisition Title:

Default supplier & contract
 Default GL analysis:
 PCC: 60060001
 Procurement:
 Treatment:

Delivery contact
 Delivery date: 11/15/2017
 Contact: ESS Construction Site (Delivery)
 Delivery address: Odarslövsvägen 113
 225 92 Lund
 Delivery attention: Deliver to Luis Ortega

Requisition details

#	Funds check	Product	Description	Unit	Supplier	Delivery date	Quantity	Currency	Price	Amount	Supplier prod...	Supplier prod...	Status	Account	COSTC	PROJECT	PCC	Tax Co
1		P4010_000	Conn.HV.S...	PCE	73081	11/15/2017	1.00	EUR	43.40	421.50	G390065	Conn.HV.SH...	Active	4010	4060	60	600600X	0
2		P4010_000	Conn.SHV-...	PCE	73081	11/15/2017	1.00	EUR	67.00	650.70	G370010	Conn.SHV-1...	Active	4010	4060	60	600600X	0
3		P4010_000	CONN, KIT...	PCE	73081	11/15/2017	1.00	EUR	82.40	800.27	G310025	CONN, KIT S...	Active	4010	4060	60	600600X	0

1,872.47

Add Delete Reset Park Close Update Deliv. date Go to Search engine Fetch cart Update gl analysis

Submitting a catalogue requisition involves the following steps:

1. Start a catalogue requisition,
2. Wait until your browser launches "Agresso eProcurement". Allow pop-up windows if required,
3. Search for the relevant supplier,
4. Create your shopping cart,
5. Check out your shopping cart (to requisition),
6. Fill in information such as requisitioner, transaction text, PCC, delivery date, delivery address (contact) and delivery attention,
7. Fetch cart,
8. Save.

Agresso will generate the enquiry and provide a requisition number.

Possibilities in agresso e-procurement window:

1. Search by advance search, category and supplier,
2. Compare products and prices,
3. Save a favorite cart,
4. Review and modify cart.

Please remember:

1. Delivery date shall be according to lead times (provided in calendar days)
2. Enter the PCC before fetching data,
3. Do not edit fetched information,
4. Submit one requisition per supplier for simplified follow-up (1 requisition = 1 order),
5. Use close buttons in pop-up windows.

Close

3. SUBMISSION OF STANDARD REQUISITIONS

Requisition entry

Requisition

* Requisitioner: Ortega, Luis 10365

Transaction text: Requisition Title

Default supplier & contract

Default GL analysis

PCC: 600600001

Treatment

Delivery contact

Delivery date: 11/15/2017

Contact: A. ESS Head Office (Delivery)

Delivery address: Tunavägen 24, 223 63 LUND

Delivery attention: Deliver to Luis Ortega

Requisition details

#	Funds check	Product	Description	Unit	Supplier	Delivery date	Quantity	Currency	Price	Amount	Supplier prod.	Supplier prod.	Status	Account	COSTC	PROJECT	PCC	Tax Code
1		99FREETEXT	Free-text	PCE	99	11/15/2017	1.00	SEK	1.00	1.00	ARTICLE	Free-text pr...	Active	9996	4060	60	6006000	0
2		FRAMEWO...	Framework...	PCE	99	11/15/2017	1.00	SEK	0.00	0.00	FRAMEWORK	Framework ...	Active	9996	4060	60	6006000	0
3		CONSULTA...	Consultant...	PCE	99	11/15/2017	1.00	SEK	0.00	0.00	CONSULTAN...	Consultant, ...	Active	6555	4060	60	6006000	0
4		CONSULTA...	Consultant...	PCE	99	11/15/2017	1.00	SEK	0.00	0.00	CONSULTAN...	Consultant, ...	Active	6550	4060	60	6006000	0

1.00

Add Delete Reset Park Close Update Deliv.date Go to Search engine Fetch cart Update gl analysis

Submitting a standard requisition involves the following steps:

1. Start a standard requisition,
2. Fill in information such as requisitioner, transaction text, PCC, delivery date, delivery address (contact) and delivery attention,
3. Enter one product line using product:
 - a. **99FREETEXT** (for purchase orders and direct agreements involving goods/services/works)
 - b. **FRAMEWORK AGREEMENT** (for establishing a framework agreement (FA))
 - c. **CONSULTANTTIME** (for call-offs and agreements for time reporting consultants)
 - d. **CONSULTANTNOTIME** (for call-offs and agreements for no time reporting consultants)
4. Upload relevant documents:
 - a. Request for Procurement Services (RFPS) form,
 - b. Evaluations (consultants under FA only),
 - c. Award recommendations (consultants under FA only),
 - d. Quotations,
 - e. Shopping carts,
 - f. Specifications,
5. Save.

Agresso will generate the enquiry and provide a requisition number.

Please remember:

1. Information provided for delivery date, address (contact) and attention shall be accurate,
2. Use one product line only,
3. Information provided in product line shall contain: (i) a brief description, (ii) quantity = 1, (iii) correct currency, (iv) price = total value of requisition,
4. Attached documents in editable versions (word, excel, pdf...). Avoid scanned copies and/or pictures.

4. SUBMISSION OF SUPPLIER WEBSHOP REQUISITIONS

Supplier Webshop Requisition (EE)

#	SupplID	Supplier
1	71201	Attea Sverige
2	71549	Digi-Key Elect
3	70679	Dustb
4	70367	Elfa Distrelec
5	70244	Farnell Comp
6	70905	Festo AB
7	71380	Hilti Svenska

Requisition entry

Requisition details

#	Funds check	Product	Description	Unit	Supplier	Delivery date	Quantity	Currency	Price	Amount	Supplier prod...	Supplier prod...	Status	Account	COSTC	PROJECT	PCC	Tax Co
1		UN-3215	SMATIC E...	PCE	71844	11/3/2017	1.00	EUR	132.89	1,290.63	8ES7134-63...	SMATIC ET...	Active	4010	4060	60	600600X	0

Submitting a supplier webshop requisition involves the following steps:

1. Start a catalogue requisition,
2. Select a supplier,
3. Wait until your browser launches the supplier's webshop. Allow pop-up windows if required,
4. Create your shopping cart,
5. Check out your shopping cart and transfer to agresso/ERP,
6. Fill in information such as requisitioner, transaction text, PCC, delivery date, delivery address (contact) and delivery attention,
7. Fetch cart,
8. Save.

Agresso will generate the enquiry and provide a requisition number.

Please remember:

1. Supplier's webshops provide different solutions/wording when transferring data to agresso,
2. Update delivery date according to lead times specified in supplier's webshop,
3. Enter the PCC before fetching data,
4. Do not edit fetched information,
5. Submit one requisition per supplier for simplified follow-up (1 requisition = 1 order).

5. UPDATE OF PROCUREMENT REQUISITIONS

Requisitions can be updated at any time before the final approval of the enquiry. The following actions are possible:

1. Update general information and documents attached,
2. Update a product line with new information. Depending on the new information a new approval workflow may be triggered,
3. Park a product line. Parking a product line should park the approval workflow (unless there are many
4. Reset a parked product line.

The process for modifying requisitions involves the following steps:

1. Start standard requisition,
2. Go to open,
3. Search by requisition number,
4. Click on the resulting requisition line,
5. Perform the relevant action,
6. Save.

6. APPROVAL OF REQUISITIONS

Approvers of requisitions will receive a task “**APPROVE REQ**” in agresso and a reminder email with a link to the relevant task. Approvers shall review the information provided in the approve requisition window and take the relevant action. The following actions are possible:

1. Approve,
2. Forward,
3. Return to Requisitioner,
4. Reject,

5. FOLLOW-UP OF REQUISITIONS

Information regarding the status of requisitions can be found in the **agresso procurement menu, requisition folder** in:

1. Your Purchases
2. Own Requisitions
3. Workflow user log – Requisitions

6. SUPPORT

Please send your requests for support using the request for service function in Service Now. Your request for service shall be addressed to:

- Service by area = Procurement
- Service = Purchasing