

One Council

Quick Reference Guide

SUPPLY CHAIN

Creating Requisitions – Internal Catalogue (Contract Items)



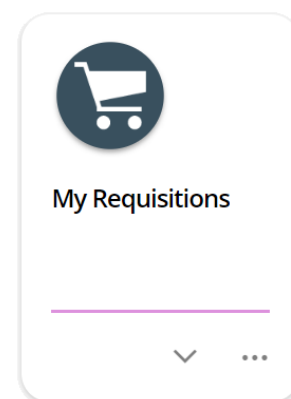
Need help? Ask for your friendly Change Champion

Overview

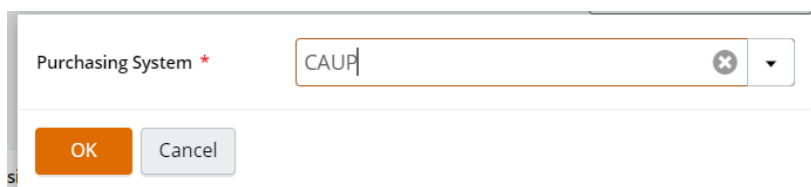
A purchase requisition is a request to purchase goods or services. Once approved, the requisition becomes an approved purchase order. This Quick Reference Guide has been designed to assist in raising a purchase requisition for contract items.

Launch My Requisitions

- ① Launch function:
 - Enterprise Search: **My Requisitions** or
 - Go to **All Roles** tab:
 - Find Supply Chain Management
 - Select **Purchasing**
 - Select **My Requisitions**



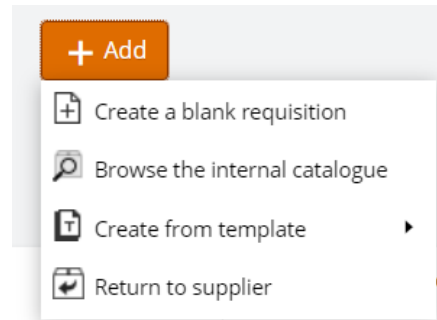
- ② Enter **CAUP** in the Purchasing System drop-down field (if launching the Purchasing System for the first time)
 - Select **OK**



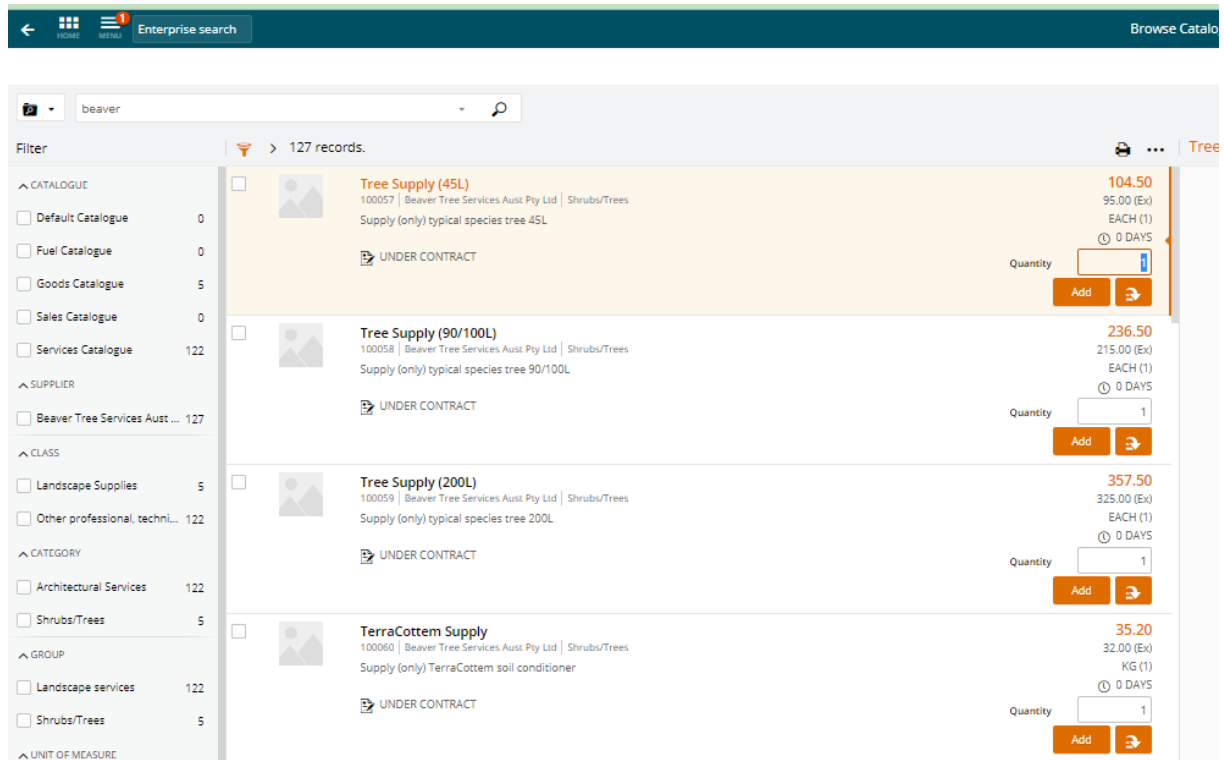
Create a Requisition

- 1 Click **+Add** button
 - Select **Browse the internal catalogue** from the drop-down menu

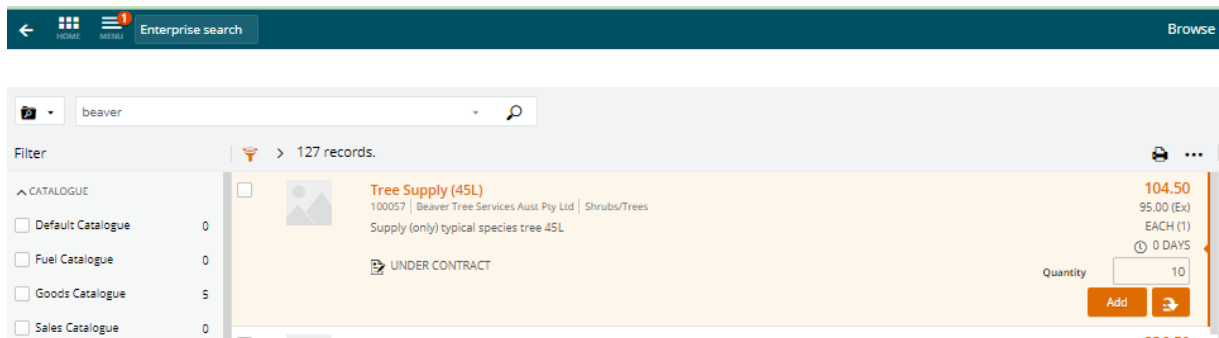
The **Browse Catalogue** screen displays



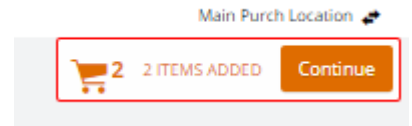
- 2 Search for the **supplier** in the search field to search for that supplier's products



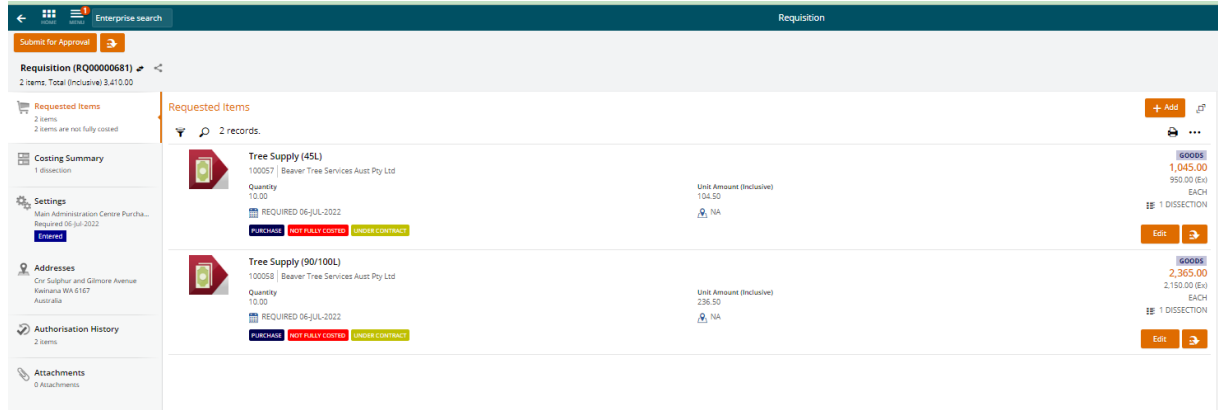
- 3 Search for and select the **relevant goods/services**
 - Enter the **required quantity**
 - Select **Add**



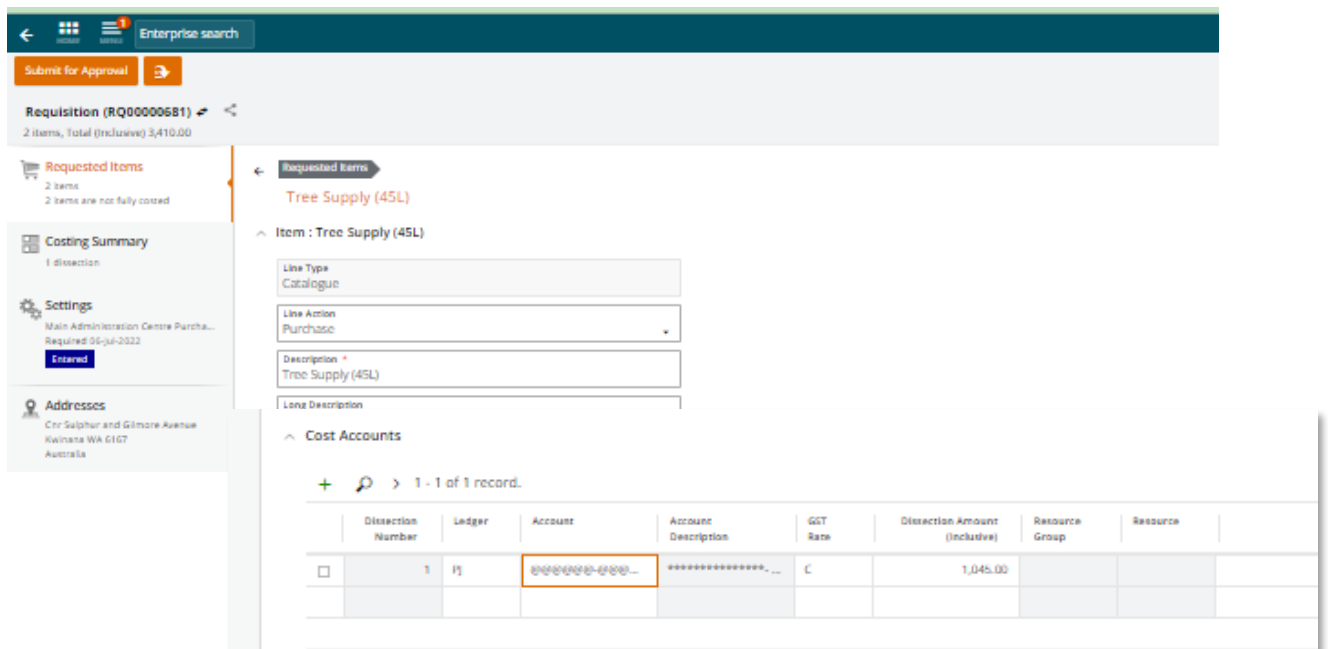
- ④ Select **Continue** once all required items have been added to the shopping cart



This will create a requisition and the items will appear under the **Requested Items** menu



- ⑤ Select **Edit**
- Update item information as required
 - Update the cost accounts
 - Repeat for each item



Note, you can have a combination of contracted items and ad-hoc (non-contracted items) included in an order requisition (from the same supplier). Refer to QRG Creating Requisitions - Adhoc Requests.

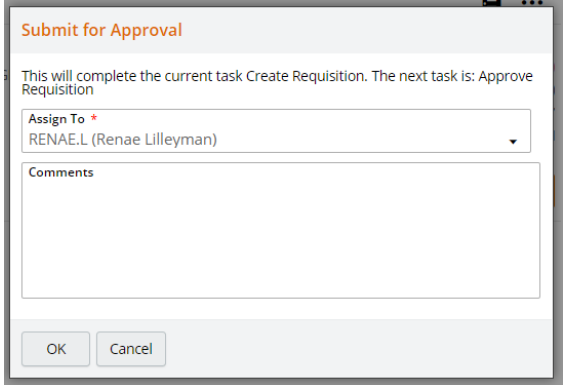
Submit for Approval

When the requisition has been completed, submit for approval.

- 1 Click **Submit for Approval** (top left of screen)

A **Submit for Approval** box will appear

The **Assign To** field will automatically default to your line manager



- 2 Click **OK**

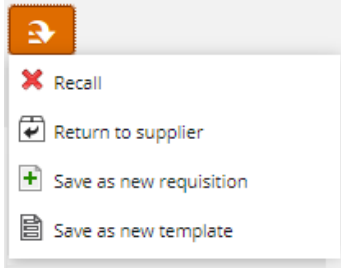


You can also select the drop-down menu which provides a list of users throughout the organisation. This selection can be updated to another officer with financial delegation who is responsible for the budget of the item required.

Recalling

Before a requisition has been approved, it can be recalled to make any further adjustments or to assign it to another approval officer.

- 1 Click the **Action menu** on the top left-hand corner.



- 2 Select the **Recall** option and confirm to recall the requisition by selecting **OK**. This will allow further changes and then resubmit it for approval

