



eProcurement 5.01 Requisitioning Guide

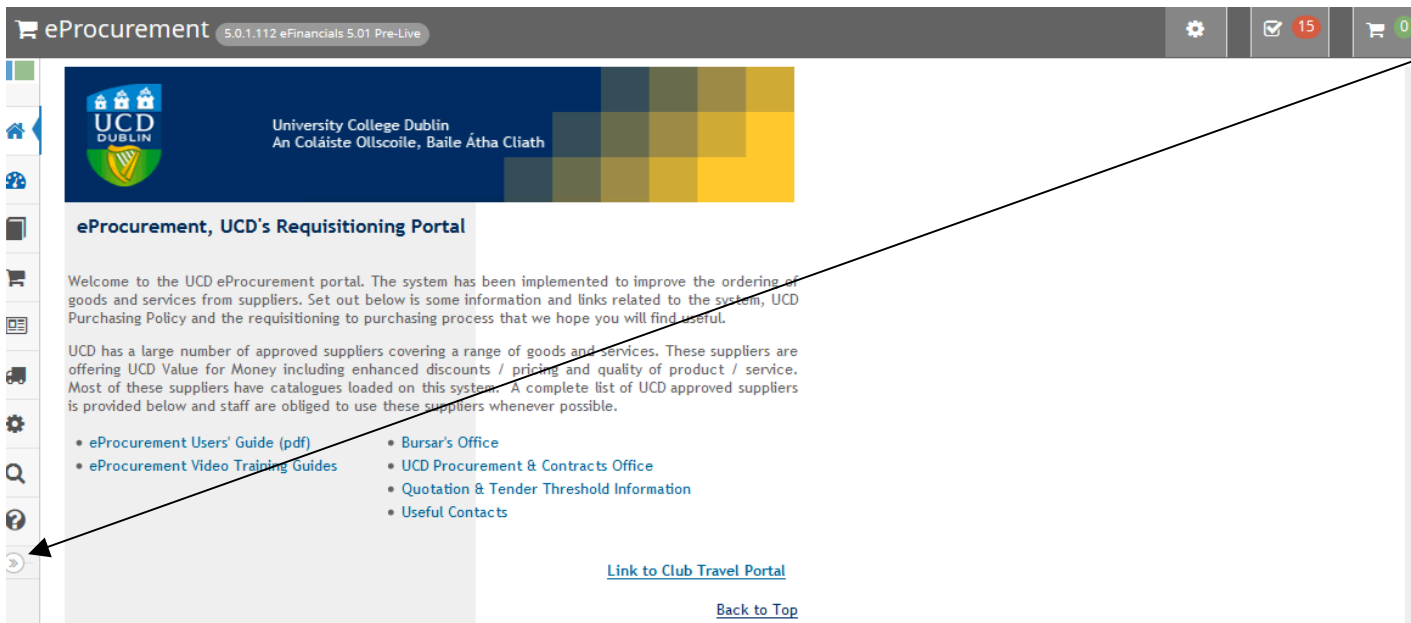
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1. LAYOUT OF SCREENS AND ICONS



1. This screenshot (left) shows the default homepage and menu along the side. It is here that you can build 2 types of basket – catalogue and non-catalogue. Use the arrow to expand the menu descriptions.

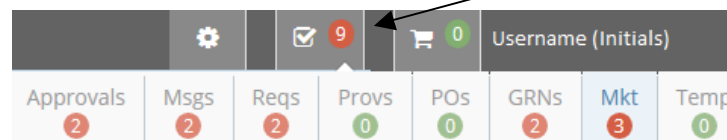


2. Users who have responsibility for receipting their requisitions will also have the **Goods Receipts (GRN)** option on this menu.

3. At the top left, all screens within eProcurement display the Blue Help button which is the main help homepage, and the Green Help button which gives guidance based on the current eProcurement portal you are using.



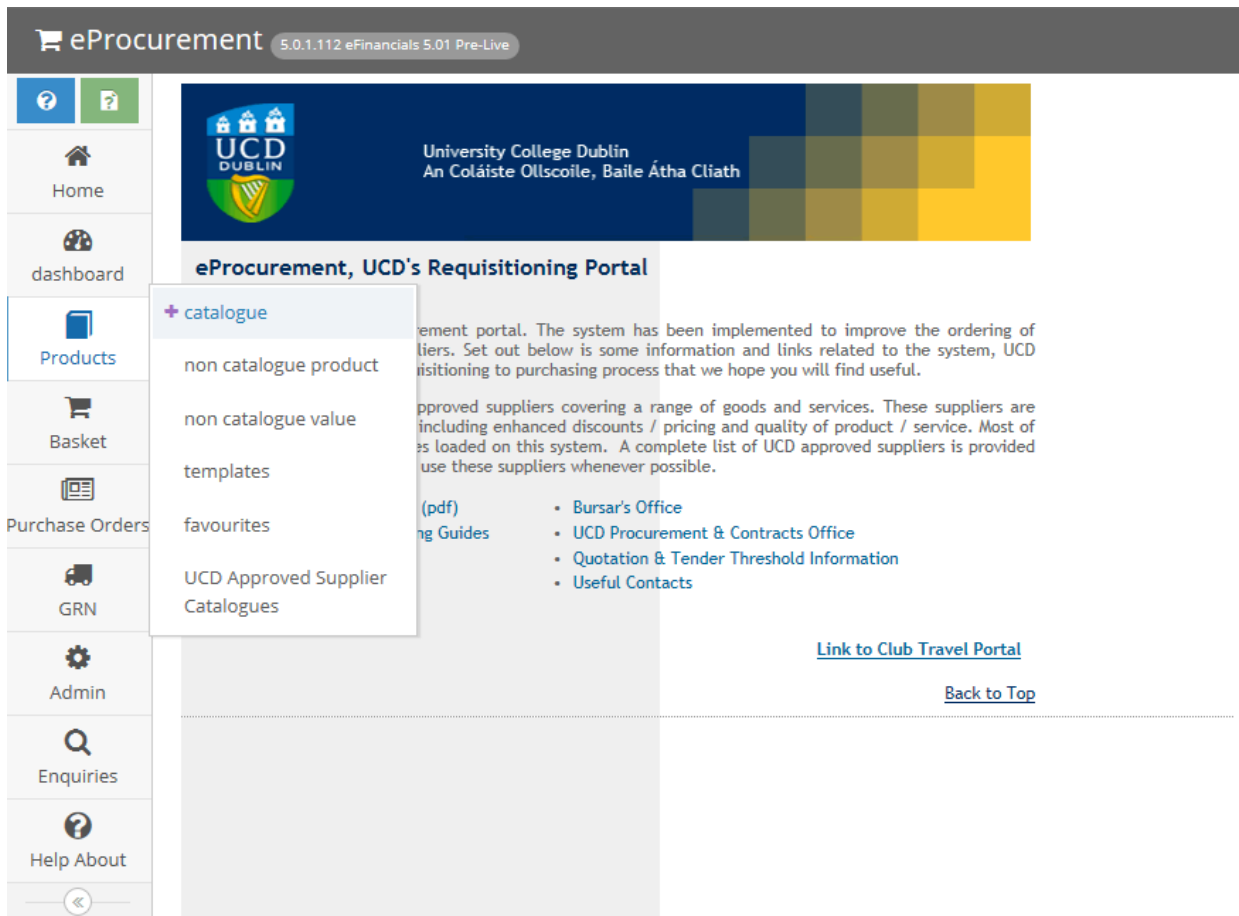
4. There is also a series of icons located on the right-hand side at the top of the screen. This is where you will find **Requisitions** for your or others approval; any **Messages**; also external/catalogue baskets under Mkt (Marketplace) **PunchOut Baskets**, etc.





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1. LAYOUT OF SCREENS AND ICONS (CONT.)

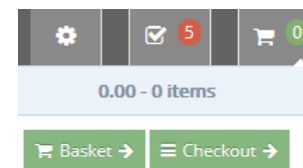


5. Hovering over the tabs on the side menu will bring up the following options;

Dashboard - Overall enquiries and order status
Products - here you'll find access to the "catalogue" (exclusive to Chemistry Stores users); the non-catalogue product or value screens; internal or non-catalogue basket templates and favourites listings; and the UCD Approved Supplier Catalogue.

Basket - here you will find access to the various basket stages, from your current basket to Contents, Analysis, and Delivery.

Note: you can also access your current basket and checkout the basket via the icons on the top right of the screen.



GRN - Express Goods Receipt, Goods Receipt, Goods Return.

Admin - please ignore.

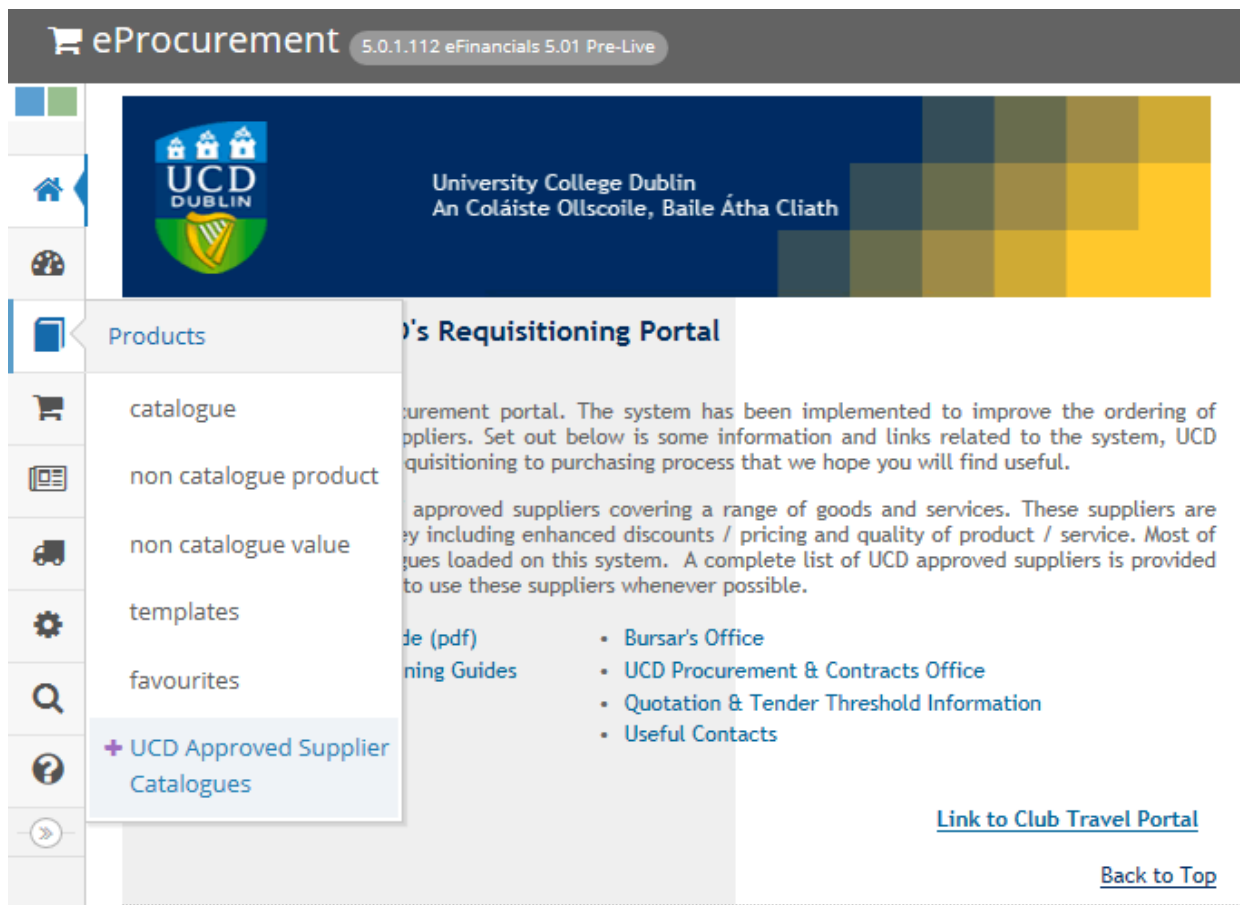
Enquiries - to look up specific orders.

Help About - please ignore.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE



1. To start, hover over the **Products** tab and click on the **UCD Approved Supplier Catalogue**; when you click on this the system will perform a punchout to the catalogue (opens in a new window).
2. The UCD Approved Supplier Catalogue has the same functionality as with the previous version of eProcurement. See **Appendix** (page 32) for a run through of UCD Approved Supplier Catalogue at the end of this Guide.
3. Users may search and select as before within the catalogue, opt to save their current Punchout Basket as a template before checking out and punching back to the main eProcurement home screen – see next.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

The screenshot shows the eProcurement interface. At the top, there is a header with the text 'eProcurement' and a sub-header '5.0.1.112 eFinancials 5.01 Pre-Live'. Below the header, there is a navigation menu on the left with various icons. The main content area displays a section titled 'External Baskets (not submitted) (7)' with a checked checkbox. Below this title is a table with three columns: 'Basket Name', 'Date', and an empty column containing green arrows. The table lists seven baskets with their respective IDs and dates.

Basket Name	Date	
SCIWARE:64254	26/05/2017	➔
SCIWARE:66106	24/05/2017	➔
SCIWARE:66112	29/05/2017	➔
SCIWARE:66114	30/05/2017	➔
SCIWARE:66121	02/06/2017	➔
SCIWARE:66123	06/06/2017	➔
SCIWARE:66124	06/06/2017	➔

4. When you return from the Approved Supplier Catalogue there will be a listing of external basket(s) on the main page. This list consists of any punchout baskets that have not yet been submitted.

5. Locate your basket, and click on the **Green Arrow** button to load your external basket into **Basket Contents**.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

Code	Description	Supplier name	UOM	UOM desc	Quantity	Price	Total	Notes	Action
	10482913 - Vial, Glass; Azpack; Glass; Inner	FISHER SCIENTIF	EA	EACH	4.00	105.46	421.84	+ [paperclip]	[trash]
	216-2752 - WATCH GLASS BOROSILICATE GLASS 125	VWR INTERNATION	EA	EACH	3.00	16.35	49.05	+ [paperclip]	[trash]
	15204023 - FLEXIBLE CARBON STEEL RULER	FISHER SCIENTIF	EA	EACH	5.00	49.65	248.25	+ [paperclip]	[trash]

Quantity	Price	Total	Notes	Action
4.00 +	105.46	421.84	+ [paperclip]	[trash]
3.00 +	16.35	49.05	+ [paperclip]	[trash]
5.00 +	49.65	248.25	+ [paperclip]	[trash]

6. You are now in the **Basket Contents** page; this is where you may review your basket items.

7. Scroll over to the right hand side to see the various icons governing each functionality;

+ : Click here to add notes

[paperclip] : Click here to add attachment(s)

[trash] : Click here to delete this line item

8. There are also **header** and **footer notes** [Notes] Notes here are for Buyer/Supplier attention. **Approver Notes** are the same as those found under **Submit with Notes at the Checkout**.

9. Users may sort their basket by selecting the **Adv. sort** button.

10. If you no longer require this basket click **Clear Basket** from the "Delete" drop down menu. If you are happy with your basket, please click **Next**.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

11. You are now in **Basket Analysis** where you need to code your basket to the cost centre and/or research job you wish to charge your items to. Enter your **Cost Centre**, **Job code** (if charging to research) and **Account Code**. When searching for a **Cost Centre** or **Account** code users may type in the **name** associated with the code or the first digits (if known). A drop down box of all values matching your typed entry will appear filtered by your user profile rights. In the example (left) we have searched for all Cost Centre codes with the word 'finance' appearing in the descriptor. The "Activity" field should be left blank.

The screenshot shows the 'Basket Analysis' interface. At the top, there are navigation buttons: 'Restore', 'Notes', 'Back', and 'Next'. Below these are search filters for 'Cost centre', 'Account', 'Activity', 'Job', 'Order type', and 'Sub ledger'. The 'Cost centre' filter is set to 'finance' and the 'Account' filter is set to '82413'. Below the filters is a table with columns: 'Cost centre', 'Account', 'Activity', 'Job', and 'Order type'. The table contains three rows of results:

Cost centre	Account	Activity	Job	Order type
2013 - BSC (ECONOMICS & FINANCE) PROG				
2030 - BANKING & FINANCE - GENERAL				
2055 - STRATEGIC FINANCE				
2126 - GLOBAL FINANCE ACADEMY				
2259 - DIPLOMA IN BUSINESS FINANCE				
4018 - 5144 FINANCE MGR CONTINGENCY	82410			
4018 - 5144 FINANCE MGR CONTINGENCY	82410			

12. Please note on the lines within the punchout basket, the Account analysis field will often default to a 5 digit account code which begins with an 8. If the account code has not defaulted in (example here is line 1), the account code entered as the header will be used instead – Remember if you are charging to a research job, the first digit of this code must begin with a 9.

13. When all coding is completed, click **Next**.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

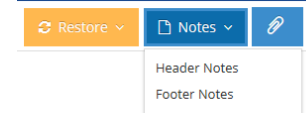
Basket Delivery Restore Notes Back Next

Del add. IDA Required date

<input type="checkbox"/>	Code ^ 1	Description ↕	Delivery address ↕	Internal delivery address ↕	Required date ↕
<input type="checkbox"/>		10482913 - Vial, Glass; Azpack: Glass; Inner	<input type="text"/>	<input type="text"/>	06/06/2017
<input type="checkbox"/>		216-2752 - WATCH GLASS BOROSILICATE GLASS 125	<input type="text"/>	<input type="text"/>	06/06/2017
<input type="checkbox"/>		15204023 - FLEXIBLE CARBON STEEL RULER	<input type="text"/>	<input type="text"/>	06/06/2017

14. You are now in the **Basket Delivery** screen. Your delivery address will automatically populate based on your user profile. Hovering over the code will bring up your complete **default** delivery address. *Please do not alter the IDA code.*

15. Throughout the punchout basket process, there are options to include notes regarding the order. The “Notes” drop-down list will give the option to include a header or footer; use this to inform your Buyer or the supplier of any changes to routine delivery instructions or in the case of food deliveries, to indicate the meeting room, date and time goods are required. Remember to select **‘save and close’** to save your basket note. The paperclip option (beside “Notes”) allows you to upload any attachments necessary for the order (e.g. a quote, or background document)



16. Click **Next** to continue to the **Basket Checkout**



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

Basket Checkout Save as Template Notes Back Submit

Req Approver: HOSU Stk Authoriser:

Basket Defaults

Cost centre	Account	Activity	Job	Order type	Sub ledger
6100	82998			BR	P31
Del add.	IDA	Required date			
040	HOSU	06/06/2017			

Code	Description	Supplier name	UOM desc	Quantity	Price	Total	Notes
	10482913 - Vial, Glass; Azpack; Glass; Inner	FISHER SCIENTIF	EACH	4.00	105.46	421.84	+
	216-2752 - WATCH GLASS BOROSILICATE GLASS 125	VWR INTERNATION	EACH	3.00	16.35	49.05	+
	15204023 - FLEXIBLE CARBON STEEL RULER	FISHER SCIENTIF	EACH	5.00	49.65	248.25	+

17. At the Checkout stage you can review a synopsis of your basket coding defaults by clicking on the arrow for “Basket Defaults”.

18. You will also now need to select an approver for this requisition (Req Approver). Enter the approver initials if known or start typing the name of the Approver, and a drop-down list of approvers will populate. (“Stk Authoriser” is exclusive to Chemistry Stores users.)

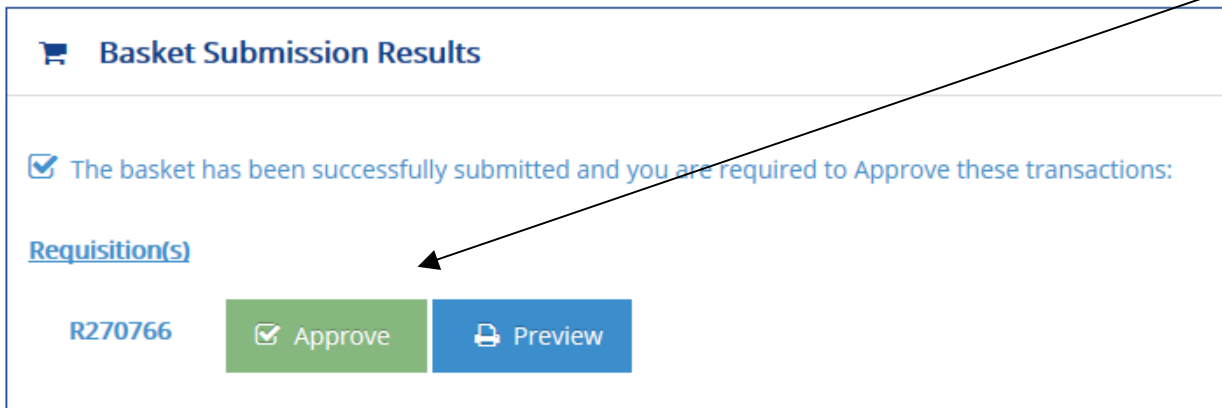
19. Click on **Submit with Notes** to write an explanatory note to your Approver or simply click on **Submit** if no note/explanation is required.

20. Provided your analysis coding is correct the basket will be successfully submitted and a requisition number allocated along with the option to **Requisition Preview**. The approver will be sent an email to let them know a requisition requires their approval. If you are a Requisitioner-Approver please see next page or Approvers Guide page 19.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)



21. **Requisition-Approvers** can now go directly to the Approval process without having to reload the requisition, see left.

22. When you approve a punchout basket requisition you will see the below message indicating that the transaction has been forwarded to the Buyer, in order to generate a Purchase Order. No further action is needed, unless/until the Buyer contacts you directly.

“Requisition **R123456** has been approved but could not generate a PO. The requisition lines are available within eFinancials for assignment.”

23. There is also an option to preview the requisition, and view in a printable format.



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2. PUNCHOUT OR CATALOGUE BASKET GUIDE (CONT.)

Approvals 29 | Msgs 0 | Reqs 31 | Provs 0 | POs 0 | GRNs 0 | Mkt 17 | Temp 0

Punchout Baskets 13

Referred Back 4

24. If the Approver is unhappy with any aspect of the Requisition, they will refer the entire basket back to the Requisitioner.

The Requisitioner will receive an email informing them that the Requisition has been referred back. They can access the Referred Back basket from the **Mkt > Referred Back** work items menu.

Code	Description	Supplier name	UOM	UOM desc	Quantity	Price	Notes	Action
KYL41	Mineral Water Sparkling	HOME FARE SERVI	EA	EACH	10.00	1.55		
KYL40	Mineral Water Still	HOME FARE SERVI	EA	EACH	10.00	1.55	N/A	15.50
KYL11	Sandwich Platter with Tea and Coffee	HOME FARE SERVI	EA	EACH	3.00	6.57	N/A	19.71

25. Having selected the relevant requisition, the reason for the referral back entered by the Approver can be viewed by clicking on **Notes > Referral Notes**.

Save as Template | Notes | Back | Submit

Submit

Submit with Notes

26. The Requisitioner can now make the required changes as indicated by the referral notes and resubmit the requisition for approval using the **Submit with Notes** functionality to inform the Approver that the changes have been made.



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3. INTERNAL OR NON-CATALOGUE BASKET GUIDE

☰ Non Catalogue - Item Details

Non Catalogue Type QTY III

Description

Flight number 12345, Passport Name, Club Travel Quote Number 12345 Item Notes

Enter up to 70 characters here. Further description can be entered using the Item Notes button

Supplier Product Code

Product Code

Quantity	UOM	Unit Price	Discount	Nett Total
<input type="button" value="-"/> 1.00 <input type="button" value="+"/>	EA	500.00	10.00	450.00

Supplier on File

Supplier

CLU002

CLU002 - CLUB TRAVEL LTD -

1. To start an Internal or Non-Catalogue Basket go to the **Home Page**, click on **Products** and select **Non-Catalogue Product**.
2. Enter a description of the line item. Please itemise your required purchases, as different VAT charges may apply to the various items requisitioned. Complete the description for each item/line and enter the price per unit (UOM = Unit of Measure). All prices entered should be **Nett of VAT**.
3. To look for a supplier, again users may type in the **name** associated with the code or the supplier code (if known). A drop down box of all values matching your typed entry will appear **filtered by the sub-ledger of the basket**. Please see next page (page 13) for how to change sub-ledger.
4. Don't forget to include delivery, service or postage charges on your non-catalogue items – again as a separate line/item.



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3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

The item has been added to your basket. If you wish to add another non catalogue item then select the relevant button 'Same Supplier' or 'Different Supplier'.

5. When the line item is ready, click **Add to Basket**. You will then be given the option to add a new line for the same supplier (e.g. "service fee" for Club Travel), a new line for a different supplier, or to go directly to your basket.

6. To order a Non-Catalogue item from a different sub-ledger, this needs to be confirmed on the system **before** starting your internal basket, as P31 will automatically default in for you.

7. To change sub-ledgers, first from the home page go to the **Basket - Analysis** screen and enter your chosen **Sub-Ledger** code; you must then click **Back** (to save the updated sub-ledger). **You may need to enter a cost centre before the system will allow you to proceed. This can be amended later.** Now you can go back to **Products** and **Non-Catalogue Product** screen to enter in the item(s) required. Once all lines are entered, click on the "Go to Basket" option.



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3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

Basket Contents									
Code	Description	Supplier name	UOM	UOM desc	Quantity	Price	Total	Notes	Action
	Flight number 12345, P	CLUB TRAVEL LTD	EA	EACH	1.00	500.00	450.00	+ [paperclip]	[copy] [trash]
	Service Fee	CLUB TRAVEL LTD	EA	EACH	4	60.00	60.00	+ [paperclip]	[copy] [trash]
	Room Booking Ref 123	CLUB TRAVEL LTD	EA	EACH	1.00	600.00	540.00	+ [paperclip]	[copy] [trash]

Quantity	Price	Total	Notes	Action
- 1.00 +	500.00	450.00	+ [paperclip]	[copy] [trash]
- 4 +	60.00	60.00	+ [paperclip]	[copy] [trash]
- 1.00 +	600.00	540.00	+ [paperclip]	[copy] [trash]

8. You are now in the **Basket Contents** page; this is where you may review your basket items.

9. Scroll over to the right hand side to see the various icons governing each functionality;

+ : Click here to add notes

[paperclip] : Click here to add attachment(s)

[copy] : Click here to copy this line item

[trash] : Click here to delete this line item

10. There are also **header** and **footer notes** [Notes] Notes here are for Buyer/Supplier attention. **Approver Notes** are the same as those found under **submit with notes at the Checkout**.

11. Users may sort their basket by selecting the **Adv. sort** button.

12. If you no longer require this basket click **Clear Basket** from the "Delete" drop down menu. Otherwise, please click **Next**.



eProcurement 5.01 Requisitioning Guide

3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

Basket Analysis Restore Notes Back Next

Cost centre: Account: Activity: Job: Order type: BR Sub ledger: P31

<input type="checkbox"/>	Code ^ 1	Description ↕	Cost centre ↕	Account ↕	Activity ↕	Job ↕	Order type ↕
<input type="checkbox"/>		Flight number 12345, Passport Name, Club Trav	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		Service Fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		Room Booking ref 123456	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>		Service Fee	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

13. You are now in **Basket Analysis** where you need to code your basket to the cost centre and/or research job you wish to charge your items to.

14. As with your punchout baskets, you will need to complete the financial coding for this basket – details entered in the **header** will apply as **default** to all items, unless individual analysis at **line** level has been entered. Please use appropriate **Account** codes beginning with a **9** for research, or 8 for a cost centre. The **Activity** field is not required, please ignore. Your Sub-ledger field will already be populated.

15. If you are happy with your coding, click on **Next**.



eProcurement 5.01 Requisitioning Guide

3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

Basket Delivery Restore Notes Back Next

Del add. IDA Required date

<input type="checkbox"/>	Code	Description	Delivery address	Internal delivery address	Required date
<input type="checkbox"/>		Flight number 12345, Passport Name, Club Trav	<input type="text"/>	<input type="text"/>	25-May-2017
<input type="checkbox"/>		Service Fee	<input type="text"/>	<input type="text"/>	25-May-2017
<input type="checkbox"/>		Room Booking ref 123456	<input type="text"/>	<input type="text"/>	25-May-2017
<input type="checkbox"/>		Service Fee	<input type="text"/>	<input type="text"/>	25-May-2017

16. You are now in the **Basket Delivery**. Your delivery address will automatically populate based on your user profile. Hovering over the code will bring up your complete default delivery address. *Please do not alter the IDA code.*

17. The “Notes” drop-down list will give another option to include a header or footer; use this to inform your Buyer or the supplier of any changes to routine delivery instructions or in the case of food deliveries, to indicate the meeting room, date and time goods are required. Remember to select **‘save and close’** to save your basket note. The paperclip option (beside “Notes”) allows you to upload any attachments necessary for the order as a whole (e.g. a quote, or background document).

18. Click **Next** to continue to the **Basket Checkout**.



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3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

Basket Checkout [Save as Template] [Notes] [Back] [Submit]

Req Approver: HOSU | Stk Authoriser: []

Basket Defaults

Cost centre	Account	Activity	Job	Order type	Sub ledger
6100	82998			BR	P31
Del add.	IDA	Required date			
040	HOSU	02/06/2017			

Code	Description	Supplier name	UOM desc	Quantity	Price	Total	Notes
	Flight number 12345, Passport name	CLUB TRAVEL LTD	EACH	1.00	500.00	450.00	+ []
	Service Fee	CLUB TRAVEL LTD	EACH	4.00	60.00	240.00	+ []
	Room Booking Ref 12345	CLUB TRAVEL LTD	EACH	1.00	600.00	540.00	+ []

19. At the Checkout stage you can review a synopsis of your basket coding details by clicking on the arrow for "Basket Defaults".

20. You will also now need to select an approver for this requisition (Req Approver). Enter the approver initials or start typing the name of the Approver, and a drop-down list will populate. ("Stk Authoriser" is exclusive to Chemistry Stores users.)

21. Click on **Submit with Notes** to write an explanatory note to your Approver or simply click on **Submit** if no note/explanation is required.

22. Provided your analysis coding is correct the basket will be successfully submitted and a requisition number allocated along with the option to **Requisition Preview**. The Approver will be sent an email to let them know a requisition requires their approval. If you are a Requisitioner-Approver please see next page or Approvers Guide page 19.



eProcurement 5.01 Requisitioning Guide

3. INTERNAL OR NON-CATALOGUE BASKET (CONT.)

Basket Submission Results

The basket has been successfully submitted and you are required to Approve these transactions:

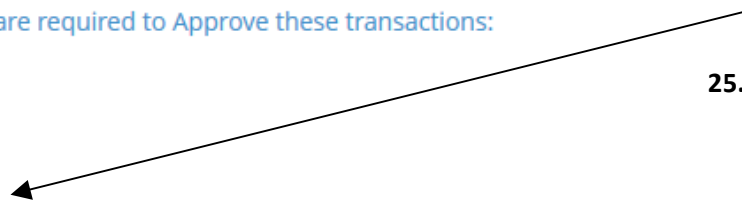
Requisition(s)

R270778	<input checked="" type="checkbox"/> Approve	Preview
---------	---	---------

23. As with an External basket, **Requisition-Approvers** can go directly to the approval process without having to reload the requisition.

24. There is also an option to preview the requisition, and view in a printable format.

25. When you approve the non-catalogue requisition, you will see the following message indicating that the transaction has been forwarded to the Buyer, in order to generate a Purchase Order. No further action is needed, unless/until the Buyer contacts you directly.



Approval Results

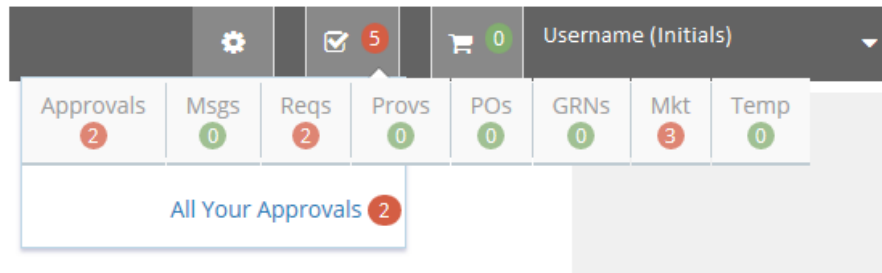
Requisition **R270778** has been approved but could not generate a PO. The requisition lines are available within eFinancials for assignment.

Requisition R123456 has been approved but could not generate a PO. The requisition lines are available within eFinancials for assignment.



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4. APPROVERS GUIDE

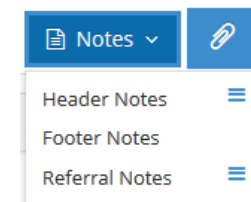


Requisitions (2) Provisions (0) Orders (0)

Requisitions for your Approval (2)

Requisition Number	Requestor Initials	Requestor Name	Date	Value	Line Count	Description	
R270764	HOSU	Hazel O'Sullivan	23-May-2017	1,435.64	4	Req. created from external	
R270769	HOSU	Hazel O'Sullivan	26-May-2017	1,110.00	4	Req. created from Basket	

1. When prompted by the usual workflow e-mail, approvers should login to eProcurement as normal.
2. Under the work items icon along the top right hand side, click on **“Reqs”** menu option and select *“for your approval”*. Alternatively, from the same location you can click on **“Approvals”** and select *“All Your Approvals”*
3. Any outstanding or unapproved requisitions will be listed here. Click on the **Green Arrow** button to load a specific requisition.
4. **Approvers can click on Print - Print Preview to review details for the requisition.**
5. Approvers should check to see if there are any referral notes by clicking on the **“Notes”** dropdown menu. Any notes attached to the order will be indicated by as per the below:





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4. APPROVERS GUIDE (CONT.)

Requisition Approval (R270769) Refer/Cancel Print Notes Update Approve

Default Values

Cost centre	Account	Activity	Job	Order type	Sub ledger
6100	82201			BR	P31
Delivery address	Internal delivery address	Req Approver			
040	HOSU	HOSU			

Details Analysis

Description	Cost centre	Account	Activity	Job	Delivery address	Internal delivery address	
Service Fee							2
Room Booking ref 123456							2
Flight number 12345, Passport Name, Club Trav	3100						2
Service Fee	3100 - CHEMISTRY - GENERAL						2

6. If further information is required regarding the charge coding, click on the arrow to see the default values. **Note: Approvers now have the ability to change the analysis or financial coding of a requisition without referring it back.** To do so, click on 'Analysis' Tab and under the cost centre/account or job code fields enter your required changes, remember to hit **Update**.

7. Finally when you are happy with all financial analysis coding go back to the **Details** tab where you will see the **Approve** option for each individual line, or alternatively select **Approve** from the top of the screen to approve the entire order.

8. On approval the below message appears indicating that the order has been forwarded to the Buyer, in order to generate a Purchase Order. No further action is needed, unless/until the Buyer contacts you directly.

Approval Results

Requisition **R270778** has been approved but could not generate a PO. The requisition lines are available within eFinancials for assignment.



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4. APPROVERS GUIDE (CONT.)

Requisition Approval (R270769)

Default Values

Cost centre	Account	Activity	Job	Order type	Sub ledger
6100	82201			BR	P31
Delivery address	Internal delivery address	Req Approver			
040	HOSU	HOSU			

description	supplier name	uom	price	quantity	total	modified	approval action
Service Fee	CLUB TRAVEL LTD	EA	60.00	1.00	60.00	<input type="checkbox"/>	Refer Back
Room Booking ref 12345	CLUB TRAVEL LTD	EA	600.00	3.00	1,620.00	<input type="checkbox"/>	Cancel
Flight number 12345, Pas	CLUB TRAVEL LTD	EA	500.00	1.00	450.00	<input type="checkbox"/>	Approve
Service Fee	CLUB TRAVEL LTD	EA	60.00	1.00	60.00	<input type="checkbox"/>	Approve

9. Approvers retain the option to refer back any basket they are unhappy with – for example if they do not wish to edit the transaction directly. This can be done either by using the “Refer/Cancel” drop-down list for the entire order, or by the “Approval Action” options to do this for an individual line (“Details” tab).

10. The options available are: **Cancel/Refer Back** and **Approve**. For Internal Baskets, Approvers may select a specific line for referral back and leave the balance unchecked so that they will be immediately available for approving afterwards.

11. In the example to the left, one item is being referred back, one line is cancelled and the other two lines are being approved. The approver will have the option of entering a message or reason for refer back / cancellation.



eProcurement 5.01 Requisitioning Guide

5. GRN OR GOODS RECEIPTS NOTE; *Receipting and Returning of Goods*

Goods Receipt 840369 for BR05319 Cancel Match All Save Confirm

GRN Header Information

Description (line 1) <input type="text"/>	Description (line 2) <input type="text"/>	Supplier SIGMA-ALDRICH IRELAND LTD (SIG003)
Delivery note <input type="text"/>	Receipt date 26-May-2017	Status Entered
QA code <input type="text"/>	PO Lines Filter Exclude Fully Received <input type="text"/>	Creation date 26-May-2017

PO no	Line	Product	Supplier GTIN	Description	Rec. Qty	UOM	Rec. Value	Outstanding	QA code	Notes	Under Receive	Details
BR05319	1	440345-100		440345-100G - Glass spheres	- 0.00 +	EA	N/A	2.00	<input type="text"/>		<input type="checkbox"/>	
BR05319	2	Z509221-1P		Z509221-1PAK - Watch glasses	- 0.00 +	PCK	N/A	1.00	<input type="text"/>		<input type="checkbox"/>	

- Along the left hand side of the home page, select the **GRN** option and choose either **express goods receipt** or **goods receipt**.
- Using the standard **Goods Receipt**, enter the PO Number in the top field and click on **start receipt**.
- The system will open up a list of all outstanding or available Purchase Order lines/items, see example left.
- To view the text for an individual line or item, in the **Details** column click on the icon.
- To view a previous item attachment or add a scanned copy of the delivery note click on .
- Users can manually enter the **quantity/value** for each item being recorded as receipted, or, if all outstanding items have been delivered, users may select **match all**.



eProcurement 5.01 Requisitioning Guide

5. GRN; Receipting and Returning of Goods (CONT.)


7. To save a GRN and come back to it, click **Save and Exit** or to finalise select **Confirm**. **Note:** If you exit from a GRN at this point the transaction number will be saved and the lines held but the GRN incomplete.

8. To retrieve an incomplete or **unconfirmed GRN**, go to the **GRNs** icon at the Work Items at the top right hand side of the screen. The system will list all **unconfirmed GRNs**.

9. The selected transaction will open as you left it with all outstanding values copied into the quantity/value to receipt column.

10. Remember to add any Delivery Note details before clicking on the **confirm** button.

11. To return an item, follow the same process to reverse the receipt, by selecting the **GRN**

option  and choosing **goods return**.

The screenshot shows the 'Unconfirmed GRNs (1)' section of the eProcurement system. At the top, there is a navigation menu with icons for Approvals (2), Msgs (2), Reqs (2), Provs (0), POs (0), GRNs (1), Mkt (3), and Temp (0). Below the menu is a table with the following data:

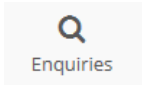
GRN Number	PO Number	Supplier	Type	Saved
840369	BR05319	SIG003	RECEIPT	No

An arrow points from the 'GRNs' icon in the navigation menu to the 'Unconfirmed GRNs (1)' table header.




eProcurement 5.01 Requisitioning Guide

6. ENQUIRIES GUIDE

1. To access the **Enquiries** tool click on the  icon along the left hand side.

2. Under the first 2 drop down options select your preferred **category** and **enquiry type** from the lists available.

3. To refine by date click on the  icon, which is located to the right of the date entry fields, and access the calendar facility.

4. Click on the **Retrieve** button to run the search results for your query.

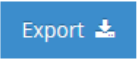
5. Results may be exported into Excel. To do this toggle between;



for your current page or



for all results, depending on which you require. Select CSV or XLS as

preferred and click on **Export** 



eProcurement 5.01 Requisitioning Guide

6. ENQUIRIES GUIDE (CONT.)

Enquiry Filters Results

Q Enquiries - Selection and Filters Clear Retrieve

Category: purchase lines enquiries | Enquiry: purchase line status

from: 01/04/2017 | cost centre: 6100 | req. no.:

to: 30/05/2017 | account: | requestor:

product: | supplier: | PO no.:

GTIN:

7. This enquiries tool is useful to see which items on a PO, or against a cost centre, have been received and which are outstanding.

8. If the PO is not known users can enter date range and/or cost centre details to refine the result, as per the example here.

9. The results reported will include details of PO and Requisition number(s), at line or item level and under the column headed **PO status** it will state one of 'confirmed; fully received, partially received or not received'.

po status
Confirmed (partially received)
Confirmed (fully received)
Confirmed (not received)

10. If you are responsible for receipting the items/services which you have ordered, use this report or **dashboard – Workflow Enquiry** to determine which PO number has been allocated to your requisitions – see page 26 (In order to raise the GRN - Goods Received Note - against the correct transaction, see page 22).




eProcurement 5.01 Requisitioning Guide

7. DASHBOARD WORKFLOW ENQUIRY ITEMS

	Purchase Order	Receipt	Invoice	Payment
R270754	Multi	Multi	Multi	B000078547
R270755	Multi	Multi		
R270756	AC10753			
R270757	AC10755			
R270758	AC10754			
R270760				
R270761				
R270762				
R270763	BR05318	840368		
R270764				
R270766	Multi	Multi	Multi	
R270767	BR05319	Multi	12345	

1. Another useful enquiries tool is the **Dashboard - Workflow Enquiry**. To access your workflow history and to check the status of your past orders altogether or to see if an invoice has been received / paid,

hover over the “dashboard” icon  and click the **Workflow Enquiry** button.

2. This page will automatically open on the “Results” tab, displaying your ordering history for the previous seven days. These results are colour coded, depending on the specific stage of the order. For example:

Requisition Colours

- **Green** - Approved and fully assigned requisitions. The requisition number is displayed.
- **Amber** - Approved but not fully assigned, or referred back.
- **Red** - Awaiting approval, re-approval, cancelled or terminated.

A full list of the colour codes for each column can be found by clicking the green section help icon in the top left hand corner:





eProcurement 5.01 Requisitioning Guide

7. DASHBOARD WORKFLOW ITEMS (CONT.)


Requisition	Purchase Order	Receipt	Invoice	Payment
R270764				
R270766	Multi	Multi	Multi	
R270767	BR05319	Multi		
R270769				
R270770				
R270771				
R270774				
R270776				
R270778				

Return: 72257 (BR05319)

Status Confirmed
By hosulliv
On 26-May-2017

Receipt:840370 (BR05319)

Status Confirmed
By hosulliv
On 26-May-2017

3. Further information can be shown on any section of the order by clicking on the  information symbol: This generates the status of the order, the reference number, the date it was actioned etc.

4. Filter your search results as needed with the "Enquiry Filters" tab and click **Retrieve**. Please note, if you are searching on the first day of a new month, you will need to select the "previous month" (or "last 7 days") filter to bring up orders from the day before.

Enquiry Filters Results

Workflow Enquiry - Filters

Type
Filter Requisition Details

My Transactions Only
 YES

Time Span
Previous Month

Status
Any

Requisition:



eProcurement 5.01 Requisitioning Guide

8. TEMPLATES – NON-CATALOGUE ITEMS ONLY

Basket Checkout [Save as Template] [Notes] [Back] [Submit]

Req Approver: HOSU | Stk Authoriser: []

Basket Defaults

Code	Description	Supplier name	UOM desc	Quantity	Price	Total	Contract id	Notes
	Template 2	CODEX LIMITED T	EACH	N/A	N/A	680.00		+ []
	Template 2.1	CODEX LIMITED T	EACH	N/A	N/A	400.00		+ []
	Template 2.2	CODEX LIMITED T	EACH	N/A	N/A	40.00		+ []

Save Template

Template Name: [Template 1] | Template Description: [Test Template 1]

Template Type: [Personal] | Review Date: [30-May-2017]

Creator: [hosulliv] | Create Date: [29-May-2017]

Template Frequency: [5] days

Entering a Frequency will automate this template and reset the review date that number of days in advance. You will then receive a reminder for the template allowing you to add to your basket and process as normal.

[Save Template]

1. Templates are useful time saving tools when ordering non-catalogue goods or services regularly. To save a current basket of non-catalogue product / value items as a template create the basket as normal, complete the **analysis** and continue to **Basket Checkout**.
2. One of the options listed on the screen will be **save as template**, click to open the template creation facility.
3. Follow the steps tabled to name your Template, and also enter a template review date and frequency amount. A reminder for the template will be sent allowing you to then add to your basket and process as normal. The frequency of this reminder depends on amount of days entered for the Template Frequency. Templates can be deactivated at any time.
4. Once the template is saved, you will receive the following message and will be returned to your current basket to submit the order as normal.

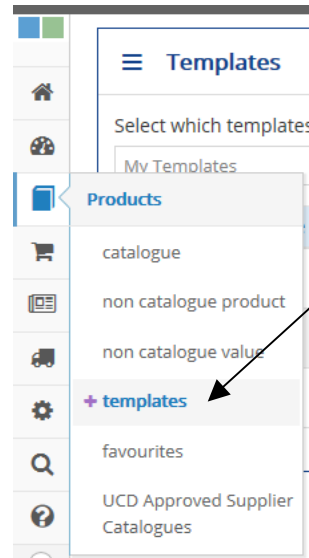
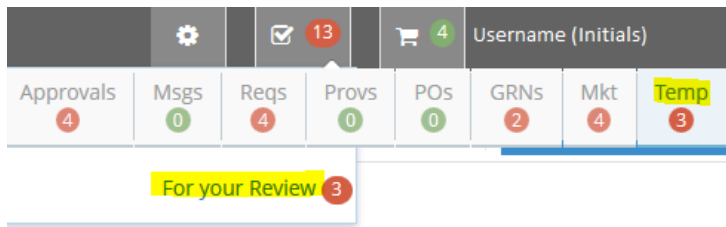
[10] [Notes] [10]

Your current basket has been successfully saved as template Template 1.



eProcurement 5.01 Requisitioning Guide

8. TEMPLATES – NON-CATALOGUE ITEMS ONLY (CONT.)



5. To access your templates, via **Products** along the left-hand side of the home page, select “templates”. Alternatively, use the **Temp** option from the **Work Items Icons** at the top right-hand side of the screen and click “For your Review”. Here, you will need to select “My Templates” from the drop-down list.

6. Multiple templates may be added to your current basket by choosing the **Select** button and clicking **Append to Current Basket** option from the Activity drop-down menu. Other options are “Over-Write Current Basket”, “Make Global” (to make available to all users), and “Deactivate”. Previously deactivated templates can also be reactivated from here. Templates can also be deleted:

7. Alternatively to select certain items only within an individual Template, append the full template to your current basket and then **select** and **delete lines** for those items not required.

Templates

Select which templates you are interested in

My Templates

Template Name	Description	Type	Review Date	Frequency	Creator	Activity
<input type="checkbox"/> Template 2	Test Template 2	Personal	30-May-2017	1	hosulliv	-- Select An Activity --
<input type="checkbox"/> Template 1	Test Template 1	Personal	30-May-2017	5	hosulliv	-- Select An Activity --

- Select An Activity --
- View Template
- Append To Current Basket
- Over-Write Current Basket
- Make Global
- Deactivate



eProcurement 5.01 Requisitioning Guide

9. FREQUENTLY ASKED QUESTIONS

Q1 **I've forgotten my password and cannot login to the system**

A1 Enter your UCD Connect username **only** and click on the '**Forgotten Password**' link. The system will reset your password and send you an e-mail with details. This temporary password can be copied and pasted into the log-in page to avoid typing errors. You will then need to choose a new password yourself when you next login, following these steps;

1. *If you login with your username and the system reset password, a message will appear requesting that you change the password.*
2. *Enter your username and system reset password again and this time click on the **Change Password** button.*
3. *Enter your username, temporary password and your own chosen new password x 2. This password will be case sensitive.*
4. **REMEMBER:** *The new password must be at least 6 characters long, contain a number, and not be in your recent password history.*

Q2 **How do I look up UCD's contracted supplier products?**

A2 From the homepage click on the Products tab, and select **UCD Approved Supplier Catalogue** to punch-out to the online catalogue.

REMEMBER: To disable POP-UP BLOCKERS for [efin1/efinapp2](#).

Q3 **What is the Catalogue facility?**

A3 This is an internal catalogue of stocked items for users in the UCD School of Chemistry, CSCB and NVRL only.

Q4 **What is the Product / Non-Catalogue facility for?**

A4 Non-catalogue ordering is for all goods or services not available through the online preferred supplier catalogue.

Q5 **Can I have multiple supplier goods in one basket / requisition?**

A5 Yes, provided they are all operating under the same currency/sub-ledger code. Multiple currencies in a single basket is not possible.

Q6 **What is a Sub-Ledger Code?**

A6 The sub-ledger code is a 3 digit code indicating in which currency and VAT zone a supplier operates. The default code is P31; this is entered by default but may be adjusted in the **Basket Analysis** screen. The main sub-ledger codes used in UCD are:

- P31** *Irish Euro Suppliers*
- P32** *Non-Irish Euro Suppliers*
- P03** *US Dollar Suppliers*
- P09** *UK £ / Sterling suppliers*

Q7 **How and when do I change the Sub-Ledger Code?**

A7 The default sub-ledger code is P31. Whenever you are purchasing from a non-ROI company the code must be adjusted to reflect the currency in which the particular supplier operates. Remember:



eProcurement 5.01 Requisitioning Guide

Q7 **How and when do I change the Sub-Ledger Code *continued...***

When buying non-catalogue items users should adjust the sub-ledger code in the **Analysis** screen before proceeding to the non-catalogue products page.

When processing items from the **UCD Approved Supplier Catalogue** or in a punch-out basket, the sub-ledger code must be adjusted in the Analysis screen, once the punch-out basket has been retrieved.

Q8 **Can I build a basket with a mixture of both non-catalogue and approved catalogue goods?**

A8 No, baskets must consist wholly of either punch-out catalogue items, or internal non-catalogue items.

Q9 **What is a Punch-out Basket?**

A9 A Punch-out Basket is made up of goods chosen from the online UCD Approved Supplier Catalogue. This is also known as an external basket, or a basket from the Marketplace.

Q10 **How do I retrieve my Punch-out Basket?**

A10 On returning from the Approved Supplier Catalogue your basket will be listed on the homepage as an External Basket. If however you need to come back to the basket at a later stage, go to the **Work Items** icons, Mtk (Marketplace) and the **Punch-Out Baskets** option.

Q11 **On submitting basket 'Cost Centre/Account may not have Job' message appears or 'Discrepancy between mandatory job flags'**

A11 There may be 1 of 2 problems with the coding or analysis that you have entered for your basket. Either you are using the wrong cost centre with your research account ('job' code), or the **account** code used for income and expenditure analysis begins by default with an **8**, which needs to be changed to **9** to link in with research expenditure.

Q12 **On submitting basket 'Cost Centre or Job Code is invalid or unpostable' message appears.**

A12 Check the analysis screen and make sure the job code is entered correctly. If it is, contact the Finance Systems Office at finance.systems@ucd.ie to confirm that you have access to the cost centre and/or job code for requisitioning/approving.

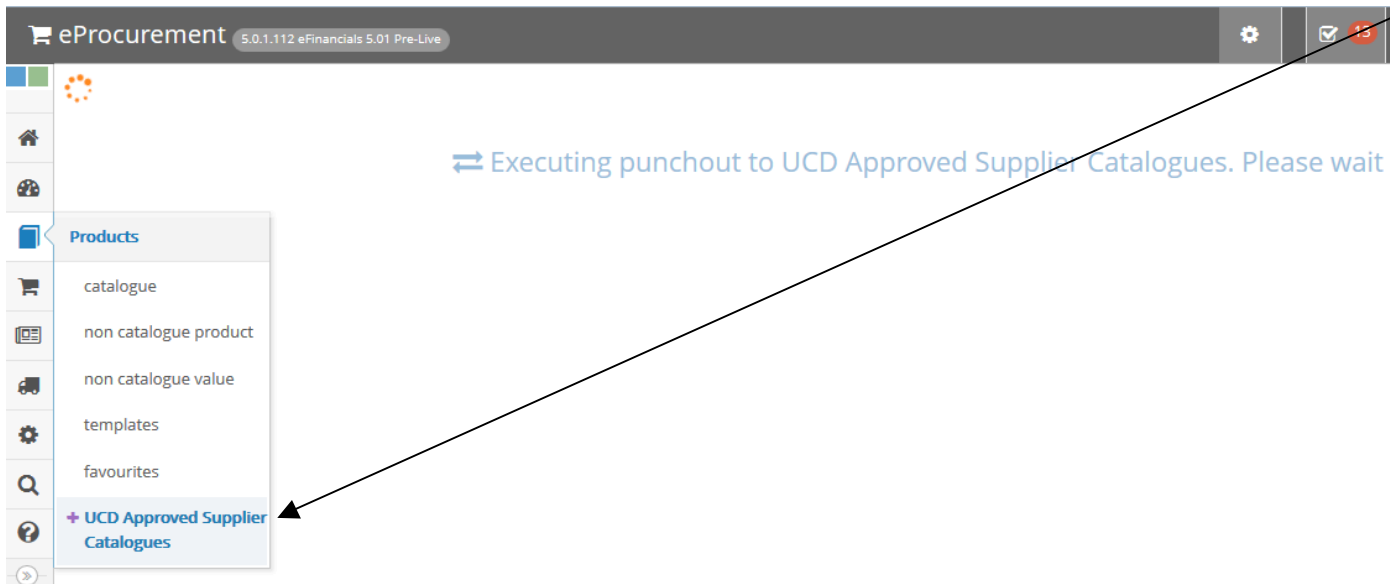
Q13 **On submitting basket 'Supplier is invalid against sub-ledger P31' message or similar appears**

A13 One of the supplier or sub-ledger codes is incorrect. Either you have the correct supplier code but have linked it to the wrong currency (sub-ledger) or vice-versa. Go back to basket contents, delete the line in question then continue on to submit the basket for P31. A new basket will then need to be done up, **only after** you have changed the sub-ledger in the Analysis screen. If a supplier needs to be set up on the system, a [Supplier Set Up Form](#) will need to be completed and sent by your Buyer to supplier.setup@ucd.ie



eProcurement 5.01 Requisitioning Guide

10. APPENDIX – UCD APPROVED SUPPLIER CATALOGUE GUIDE



1. Users still access the on-line catalogue by selecting **Products** and **UCD Approved Supplier Catalogue**
2. The system will display a white screen with the message 'executing punchout to the UCD Approved Supplier Catalogues. Please wait' for a few seconds before the homepage of the catalogue will open in a new window.
3. **Note:** If the catalogue does not open after approximately 10 seconds you may need to review and change your POP-UP Blocker settings.
4. Ensure your pop-up blocker settings allow pop-ups for **efin1/efinapp2**, then refresh your screen and select **Products** and **Approved Supplier Catalogue** again and the catalogue homepage will open.



eProcurement 5.01 Requisitioning Guide

10. APPENDIX – UCD APPROVED SUPPLIER CATALOGUE CONTINUED

marketplace home my account help log out view basket (5) 4,203.41 checkout

UCD DUBLIN Search...

Welcome, Hazel O'Sullivan!
Not you? Please [Log out](#)

Marketplace news

» [June 2015: New Supplier - Datapac Ltd](#)
The Datapac Ltd catalogue is now available on the marketplace!

» [VWR Ireland now VWR International](#)
December 2013

» [October 2013 New Supplier: Lennox Laboratory Supplies Ltd](#)
The Lennox Laboratory Supplies Ltd catalogue is now available on the marketplace!
[View all marketplace news](#)

Browse categories Browse suppliers

Saved baskets Favourite products

Saved basket name	Date created	No. of items	Total
Sample Saved Basket 2 30.05.2017	30-May-17	5	4,203.41
Sample Saved Basket 30.05.2017	30-May-17	3	2,842.71

[View all saved baskets](#)

science warehouse © 2017 Science Warehouse Ltd. Home Help Legal Feedback Log out

5. Here is a sample screenshot of the UCD Approved Supplier Catalogue Homepage
6. The details are tabbed out into separate categories – e.g. **'Browse Suppliers'**
7. Marketplace News bulletins appear in the left-hand pane.
8. The UCD Approved Supplier Catalogue **Saved Baskets** are listed in the bottom half of the screen and can also be accessed by selecting **my account** and **saved baskets**.
9. The resulting saved basket listing will be displayed in alphabetical order.
10. Also under **my account** will be your **favourites** listing.



eProcurement 5.01 Requisitioning Guide

10. APPENDIX - UCD APPROVED SUPPLIER CATALOGUE CONTINUED

The screenshot shows the eProcurement 5.01 search results page for the keyword 'scissors'. The page features a blue navigation bar at the top with links for 'marketplace home', 'my account', 'help', and 'log out'. A search bar at the top right contains the text 'scissors'. Below the navigation bar, the page displays a 'Refine' section on the left with filters for 'Preferred', 'With image', and 'Hide POA prices'. The main search results area shows three products:

- Scissors 16cm**: Supplier: Codex Limited, Catalogue No: WX01228A, Mfr. Part No: WX01228A. Unit price: € 6.21. Pack size: 10. Min qty: 1. No delivery charges.
- SCISSOR**: Supplier: VWR International, Catalogue No: RSGA.000.112, Mfr. Part No: 0.112. Unit price: € 13.75. Pack size: 1 Item. Min qty: 1. No delivery charges.
- SCISSOR LABORATORY**: Supplier: VWR International, Catalogue No: 233-1285, Mfr. Part No: 101.092. Unit price: € 19.59. Pack size: 1 Item. Min qty: 1.

Each product listing includes a 'Quantity' input field and an 'Add to basket' button. A 'Compare' button is also present for each product. The 'Refine' section includes a price range filter (0.09 to 279.43) and a 'Category' filter.

11. To the left is an example of a very basic search, using the word 'scissors'.

12. Users can refine the search results by **Category** or **Supplier** – the latter is quickest but the former allows you to compare pricing across a range of approved suppliers. There is also a filter by **price** or **pack size**.

13. Users may compare between 2 and 4 products at any one time. Click on the **compare** box to the right of your chosen products to select and then click on the larger **compare** button that will appear on the right-hand side at the top of the search results.

14. The system will display a larger picture of each product together with manufacturer information and full description. To choose your preferred product, enter a quantity and click the 'add to basket' button.



eProcurement 5.01 Requisitioning Guide

10. APPENDIX – UCD APPROVED SUPPLIER CATALOGUE CONTINUED

The screenshot shows the eProcurement application interface. At the top, there is a navigation bar with links for 'marketplace home', 'my account', 'help', and 'log out'. On the right side of the navigation bar, there are links for 'view basket (8) 5.514.24' and 'checkout'. Below the navigation bar, there is a search bar containing the word 'stapler'. A notification box above the search results states 'Item added to basket' and lists 'Rapesco R5 Stapler (26/6)' with a unit price of 5.20. The main content area displays search results for 'stapler', showing 114 products found. The results are sorted by 'Relevance' and show 1 out of 6 items. The first item is 'Rapesco R5 Stapler (26/6)' with a unit price of € 5.20. The second item is 'REXEL MATADOR STAPLER LILAC' with a unit price of € 34.95. The third item is 'REXEL MATADOR STAPLER CREAM' with a unit price of € 34.95. The left sidebar contains filters for 'Refine' (Preferred, With image, Hide POA prices), 'Price' (0.12 to 967.49), 'Category' (Staplers (95), Standard (11), Staples (4), Thumbtacks and Pushpins (4)), and 'Supplier' (Codex Limited (102), C and M Vellink Ltd (11)).

15. There is a 'view basket' option at the top right-hand side of the screen giving a basket synopsis.
16. The products just selected will remain visible in the main frame. Users may move directly to their next item search or choose to view the basket.
17. In the view basket field there will be an option to delete any item on the left hand side.
18. There is also the option to add current basket item(s) to a **saved basket**/template, and to find out more information on any product click on the product name.
19. When you are finished building your basket select **Checkout** to return to the homepage of the eProcurement application (*See Page 5*).