<u>**Message sent on behalf of Janice Trounson, Deputy Director Financial Control**</u>
<u>**31 July 2014**</u>

Dear Requisitioner

<u>**Implementing the QMUL Scheme of Delegation of Financial Authority on Agresso - From 1 August 2014**</u>

<u>**"How to…for requisitoners "**</u>

Please note: this is the 2nd of 4 emails related to the implementation of the new purchase order workflows on the Agresso finance system.

Email 1 – Background, key changes, implementation and who to contact
Email 2 – "How to…for requisitioners"
Email 3 – "How to…for approvers"
Email 4 – Confirmation of go live in your area and the workflow details set up

Following on from email 1, which outlined the changes being implemented in relation to the new workflow setup on Agresso, please find below some helpful tips and information for requisitioners.
Following confirmation of "go live" for your area (which will be confirmed in Email 4), if you have been assigned the role of a requisitioner, please ensure you read the following information.

1. **Dealing with a rejected requisition – you will now be able to amend rejected requisitions**

   ▪ If an approver rejects a requisition you have raised, you will receive notification of this together with the comment stating the reason for the rejection.
   ▪ You will then have the opportunity to make changes to the requisition details and re-submit it for approval. Approvers are not able to make changes to requisitions.
   ▪ You no longer need to contact the Finance Systems Team as this should now become a "conversation" between the approver and requisitioner.
   Note: if you do not amend the rejected requisition, you should ensure you close it.

2. **Checking the status of a requisition in workflow and the current task owner on Agresso**

When you create a requisition, it will now workflow to the cost centre budget holder (or their approved delegate) for approval.

You can check the current task owner on Agresso by selecting:

   Procurement - **Requisitioning**, the screen is called

   "**Workflow Enquiry – requisitions**"

3. **Research related requisitions**

   ▪ The new workflows have been set up to enable research related requisitions to workflow through the appropriate route for approval.
   ▪ School / institute related research requisitions will workflow for approval through the agreed school / institute workflow setup
   ▪ JRMO related research requisitions will workflow through the JRMO team for approval based on the following rule:
     o Any research related requisitions coded to a budget code ending in P, Q, S, T, U, V, W, X, Y, Z

4. **Agresso User Guides**

You can find all the Agresso user guides / training notes here

http://qm-web.finance.qmul.ac.uk/agresso/training-notes-and-videos/

5. **Requesting hands on Agresso system training**

- Agresso system training with the Financial Systems Team can be requested by raising an IT Helpdesk ticket.

Please note:

- If you raise a ticket using the IT Helpdesk self-service portal, the request will be directly allocated to the Financial Systems Team to deal with.

  The link to use is **https://helpdesk.qmul.ac.uk/** - you will need your college log-in details to access the system.

- Note: You can also raise a ticket by emailing the its-helpdesk@qmul.ac.uk however it will take longer for the ticket to be allocated to the Financial Systems Team to action.

- Agresso training takes place weekly.

6. **Procurement procedures and buyer training**

- You will find a copy of QMUL's Procurement Procedures here

  http://qm-web.finance.qmul.ac.uk/purchasing/

- Anyone involved in the procurement process (e.g. obtaining quotes from suppliers, negotiating terms and conditions with suppliers) should attend the QMUL Buyer Training which is delivered by the Procurement team. If you haven't attended the buyer training yet or you have a query about the procurement procedures, please contact finance-procurement@qmul.ac.uk

  You can find details about future Procurement Buyer training dates here:

  P117 – Procurement's Buyer Training http://www.esdcourses.org.uk/userlistcourse.php

7. **Purchase to Pay Process training**

- The Purchase to Pay process training has been recorded and is available to view on demand here

  http://qm-web.finance.qmul.ac.uk/purchasing/purchase2pay/index.html

You will also find various hints and tips on this intranet page (e.g. raising purchase orders, goods receipting, P2P – what to do if issues arise, guidance for requisitioners etc).

If you have any queries about the Purchase to Pay process please contact finance-procurement@qmul.ac.uk

8. **Queries and who to contact**

- **Queries about the workflow set up for your area**

  If you have any queries about the set-up of the workflows for your area including which budget codes to use, please contact your representative (as per <mark>Appendix 1)</mark>

- **Queries about the Scheme of Delegation of Financial Authority**

  If you have any queries about the Scheme of Delegation of Financial Authority, please contact Janice Trounson, Deputy Director Financial Control (j.trounson@qmul.ac.uk)

Janice Trounson
Deputy Director Financial Control