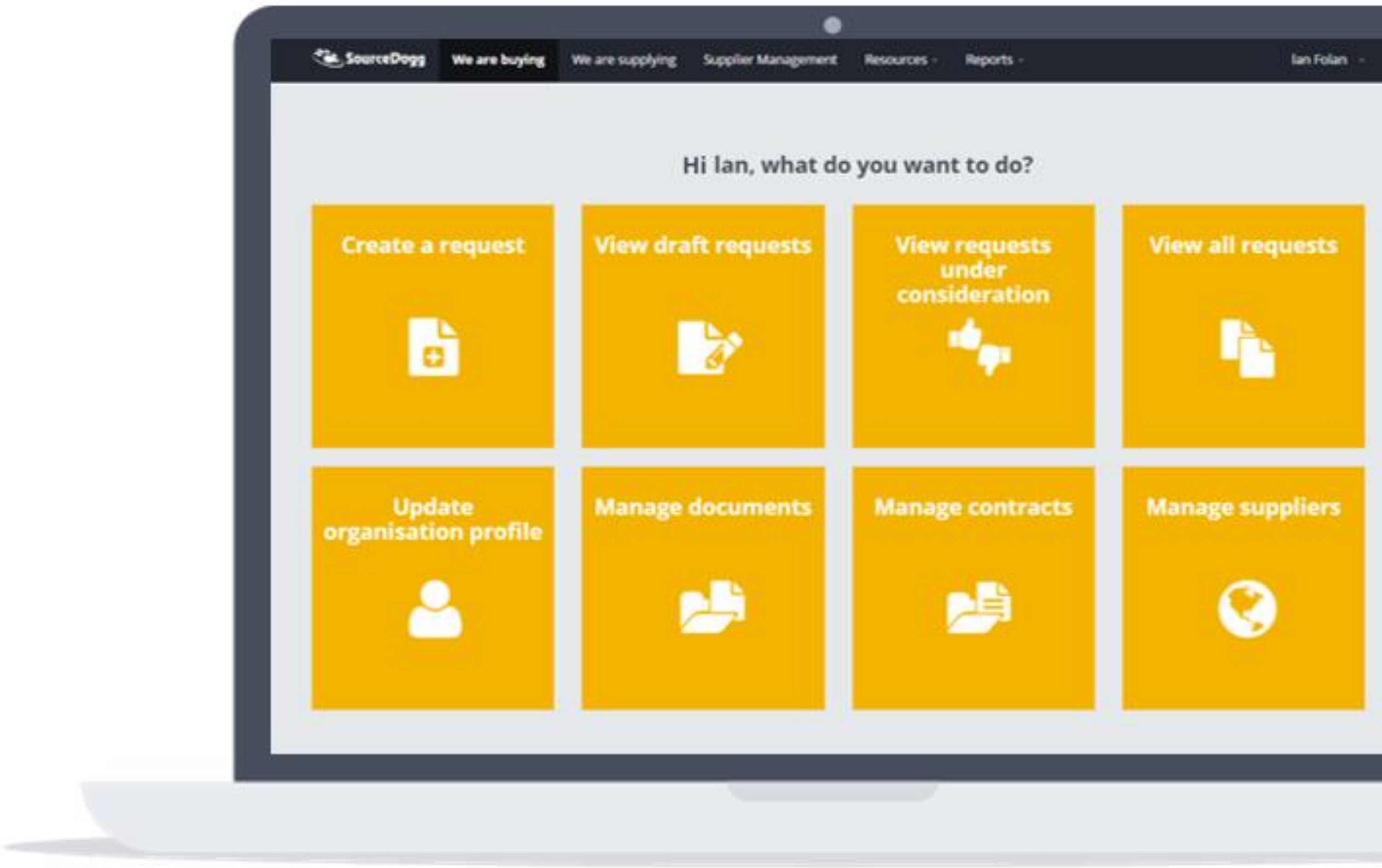
Requisitioning Module

User Guide

Date: April 2018



Contents

Introduction

The Requisition module in SourceDogg focuses on streamlining the procurement process. The module contains the following features:

Supplier Requisition

- Allows business users in the organisation to request that a new supplier be added to the supplier pool
- The requisition is reviewed and approved by the procurement team/line manager
- Suppliers from approved Requisitions are added to the onboarding process
- Requisitioning forms can be customised with users granted access to different forms depending on their department/category of the supplier, etc
- Requisitioners can communicate with the approval team through the message board and are sent automatic updates as the requisition progresses through the system

Product / Service Requisition

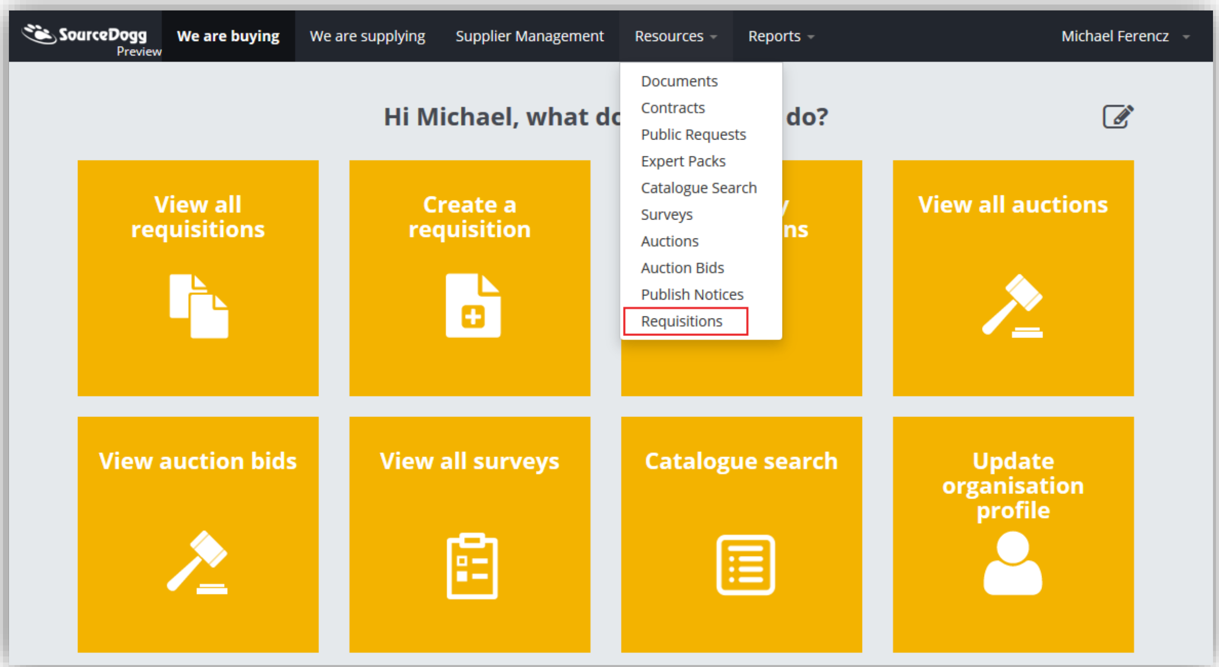
- Allows business users to request a product or service
- They enter the specification of the product/service they require which then goes through local management and procurement team approval
- Once all approvals are submitted, the product or service is added to a linked RFx template
- Procurement team can then choose which supplier they invite
- The user who created Requisition has full visibility on the progress of their requisition, e.g. if it is approved, supplier is invited, supplier has responded, etc

Purchase order

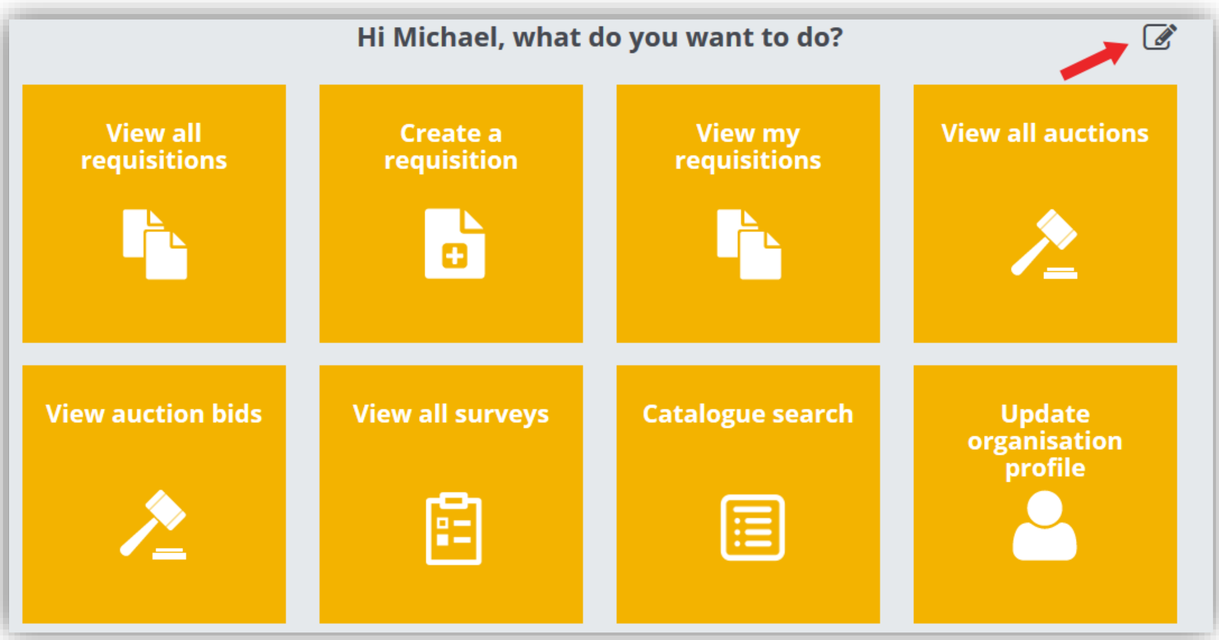
- Allows business users to generate Purchase Orders
- If the value of such Purchase Order is above the threshold assigned to the user, approvals from the head of department/procurement team are required
- Depending on the settings, Purchase Order can be sent to email, uploaded to the Secure FTP server, or triggers a Webhook

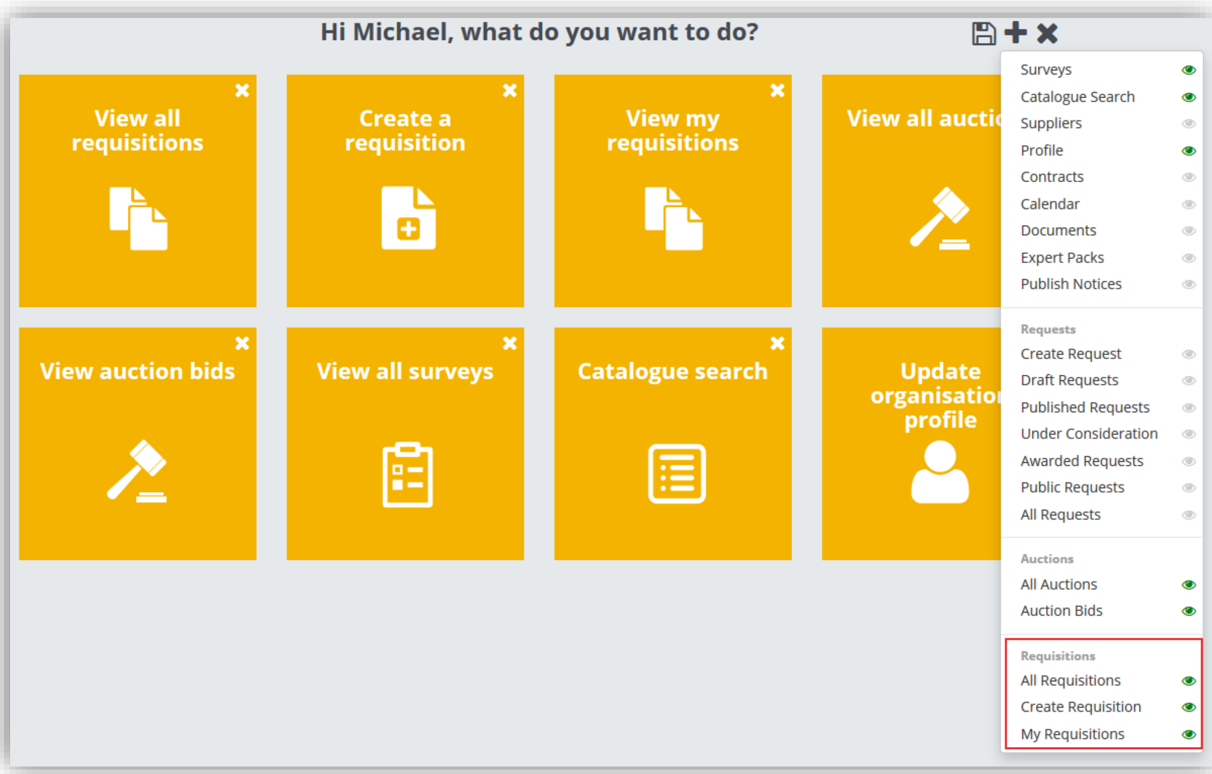
System navigation

The requisitions module can be accessed by selecting Resources from the top menu bar and clicking on “Requisitions” at the bottom of the list.

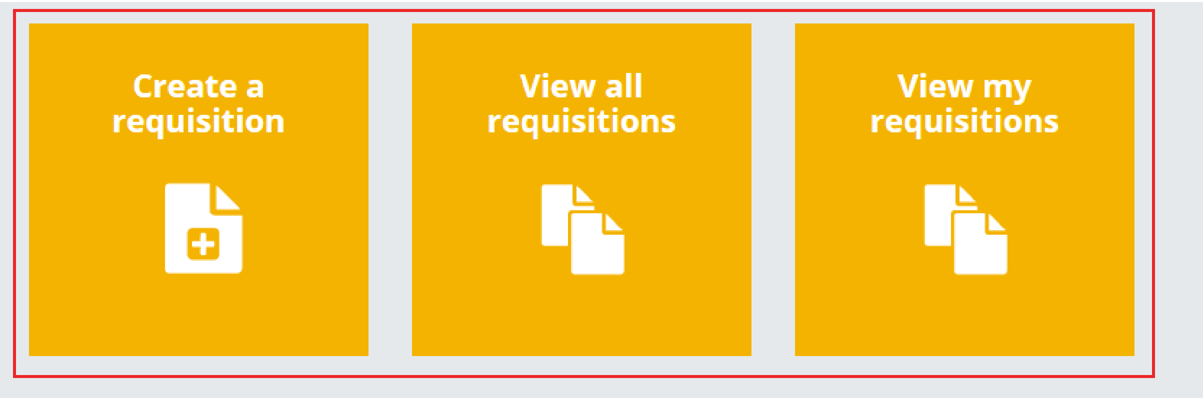


Users frequently using the requisitions module are advised to add the requisition tiles to their home screen. This can be done by selecting the “edit” icon above the tiles and clicking on the plus icon, selecting the options in the Requisitions menu.





When all of the three options are added from the tile menu, they will be displayed in user's home screen, as on the picture below.



Requisitions User Permissions

Each SourceDogg user will be required to have the appropriate level of permissions applied to their account before they will be able to access the requisitioning module. Below is the list of all the current options with the brief description for each Requisitions role.

1. **No Requisitions** – If this option is selected, the user will have no visibility of any Requisition and they will not be able to access the requisitions module.
2. **Requisition Reader** – this user will be able to access existing requisitions where they have been added as a team member, but they will not be able to create new requisitions or edit the existing ones
3. **Requisitioners** - users will be able to create requisitions, but not requisitioning form templates
4. **Requisition Approvers** – these users will be responsible for approving requisitions created by Requisition users before they are processed by the procurement team
5. **Requisition Admins** – has full permissions to access all functionality of the module, creates requisition forms for the requisition users.

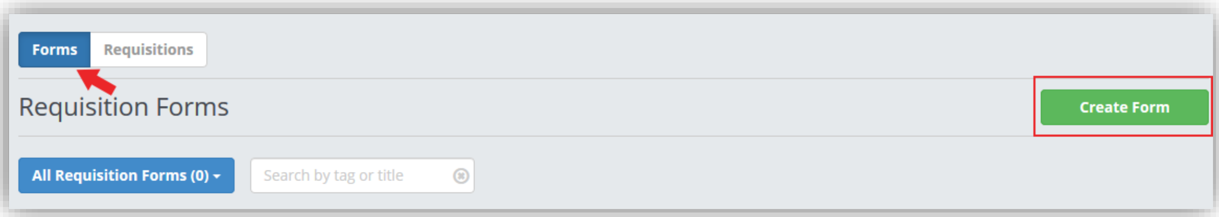
Supplier Requisitions

This functionality allows business users to request adding a new supplier to supply chain network by simply providing the information to procurement team through the pre-defined form. Each supplier Requisition will be processed through several layers of approval. If the requisition is approved, the supplier information will be used and added to existing Supplier On-boarding form and supplier will be invited to register

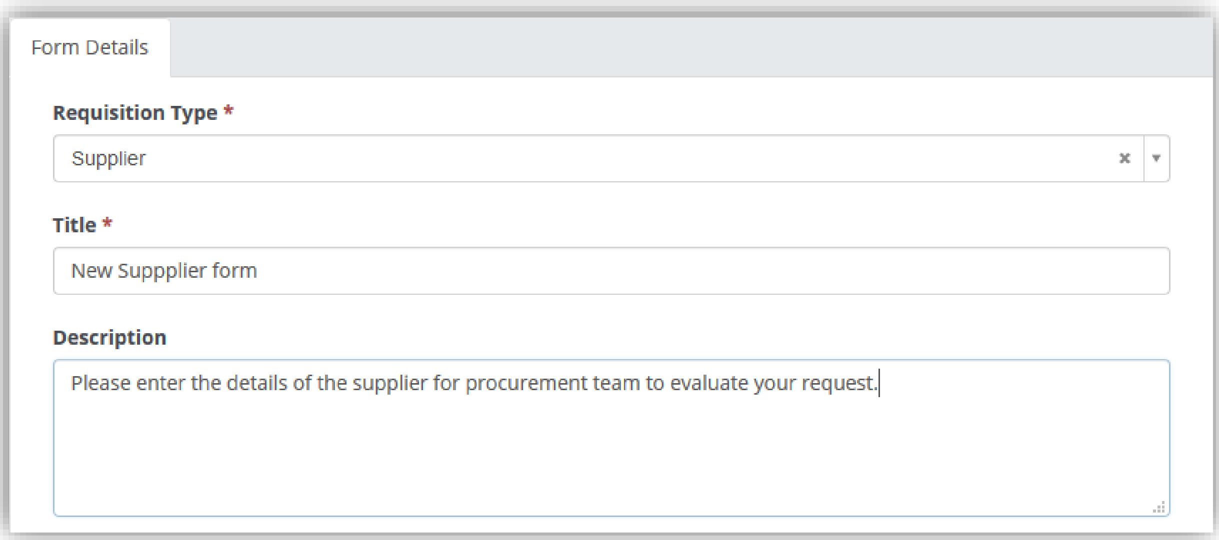
Creating Supplier Requisition form

As a first step of the process, the procurement team creates a supplier requisition form, this will be a form that requisitioners complete to request that a supplier is approved for use.

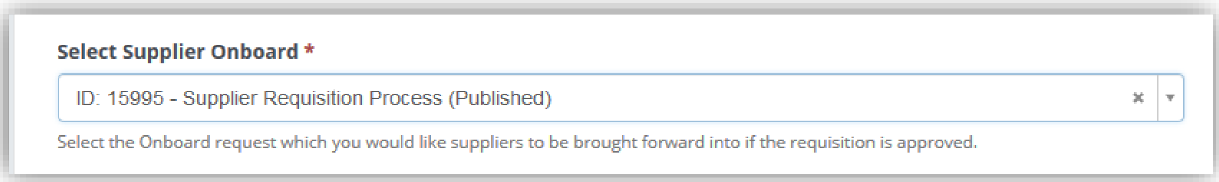
To create a new form, Requisition Admins click on the “Create Form” button in their main Requisitions screen.



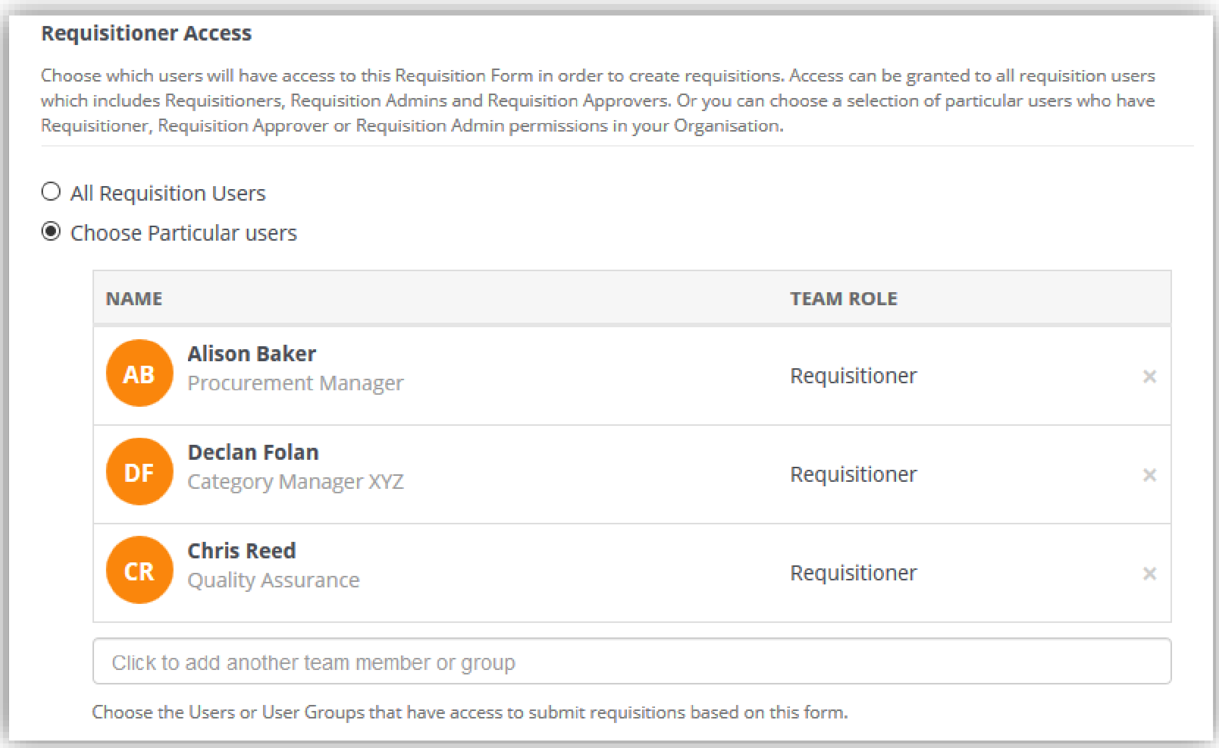
In the next screen, then select the “Supplier” option from the Requisition Type menu and enter the title of the form, as below:



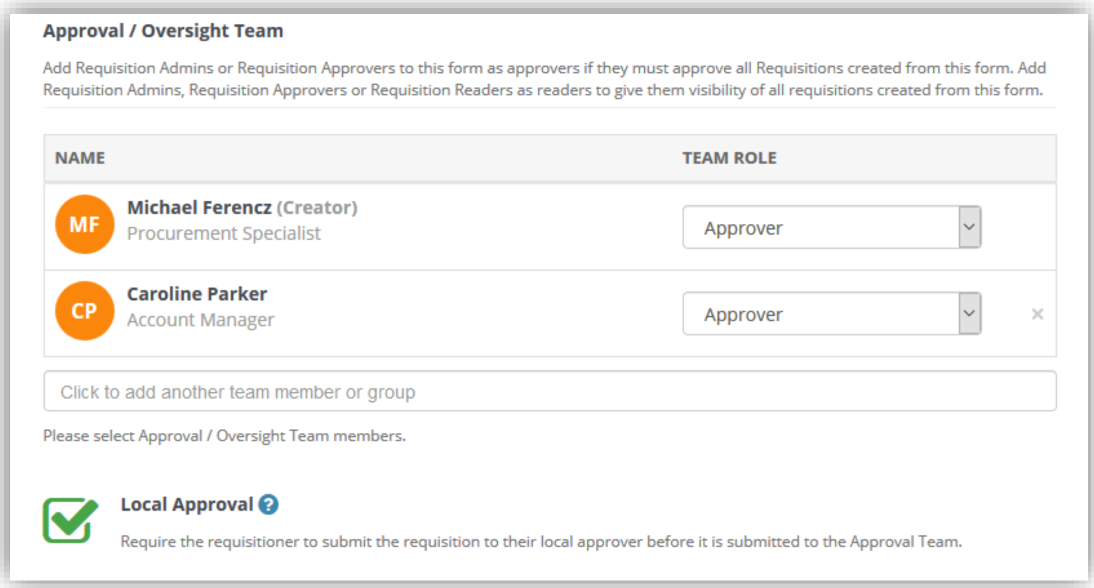
As a next step, it is necessary to select one of the existing Supplier On-boarding requests currently running on SourceDogg. If the requisition is approved, the supplier details will be automatically added to this onboarding request and the supplier can progress through the approval workflow.



Each requisition form can either be visible to all requisitioners or only selected group, e.g. department. This is selected during the creation of the form. The group of users that have access to the request can be edited at a later stage if required.

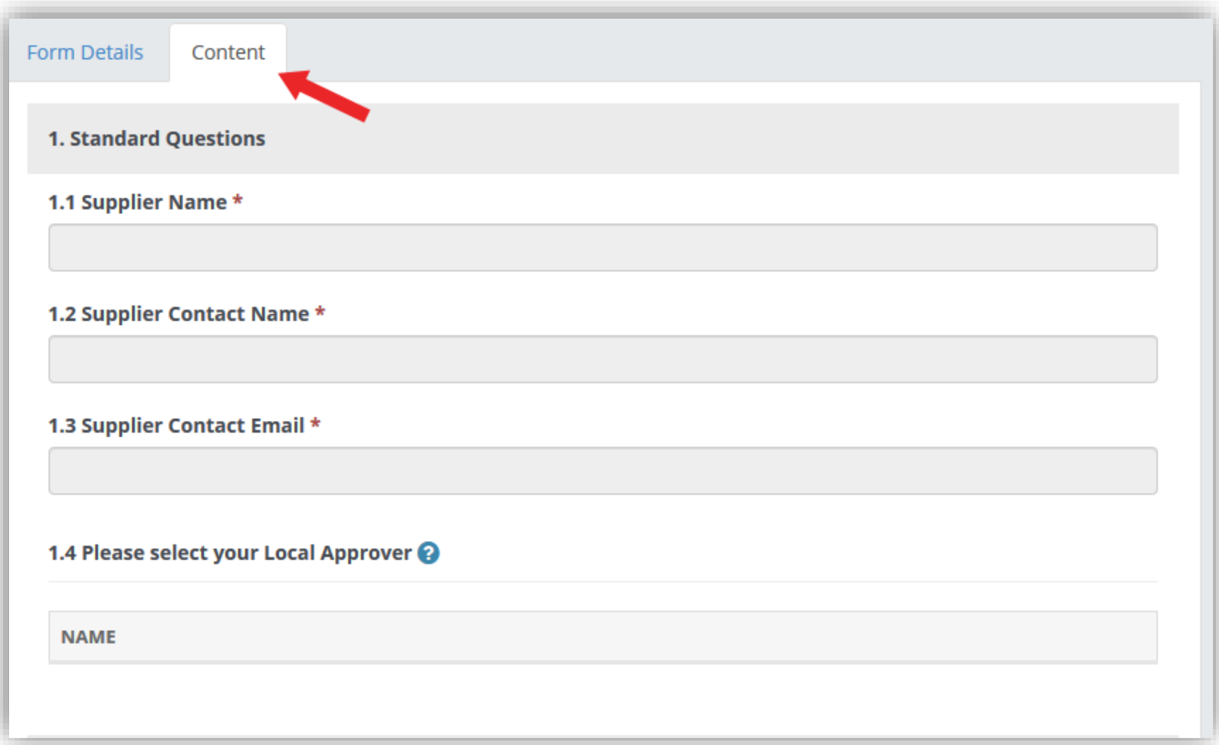


You can also set who will be required to approve the requisition before the supplier progresses through the workflow. Approving will add the supplier to the related onboarding form. If Local Approval is selected, the requisitioner will have to add their local line manager to the requisition and it will also have to be approved by them.

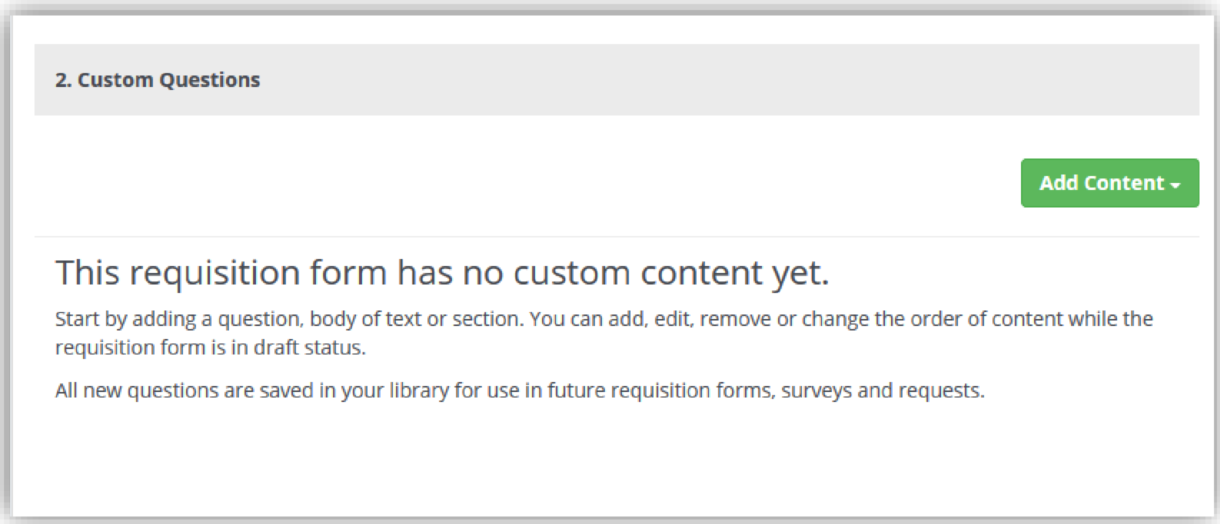


Creating the content

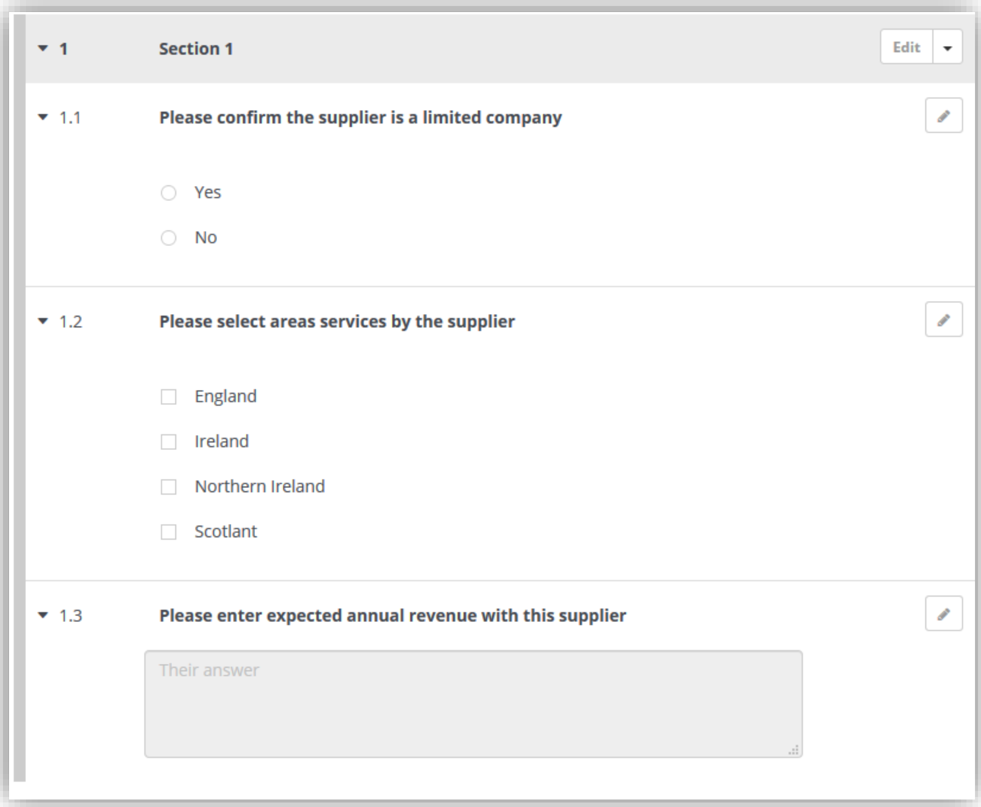
Once all the access and approval personnel are selected, the requisition form can be saved and a new tab will appear. This is the ‘Content’ tab, where Standard Questions are displayed. These are mandatory fields included in the system by default that cannot be changed on a per account basis. Requisitioners must answer these questions before they can submit. The supplier details will be used for the invitation to SourceDogg.



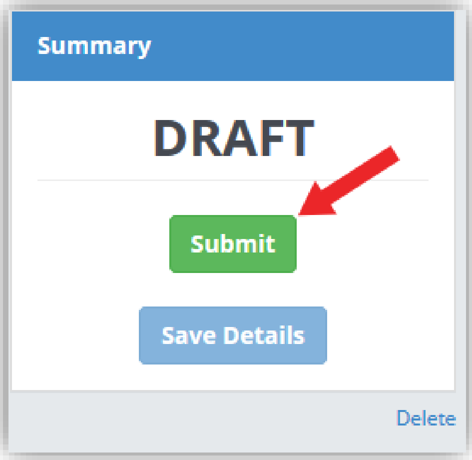
To collect additional information about the supplier, Requisition Admins can create fully customisable questionnaires.



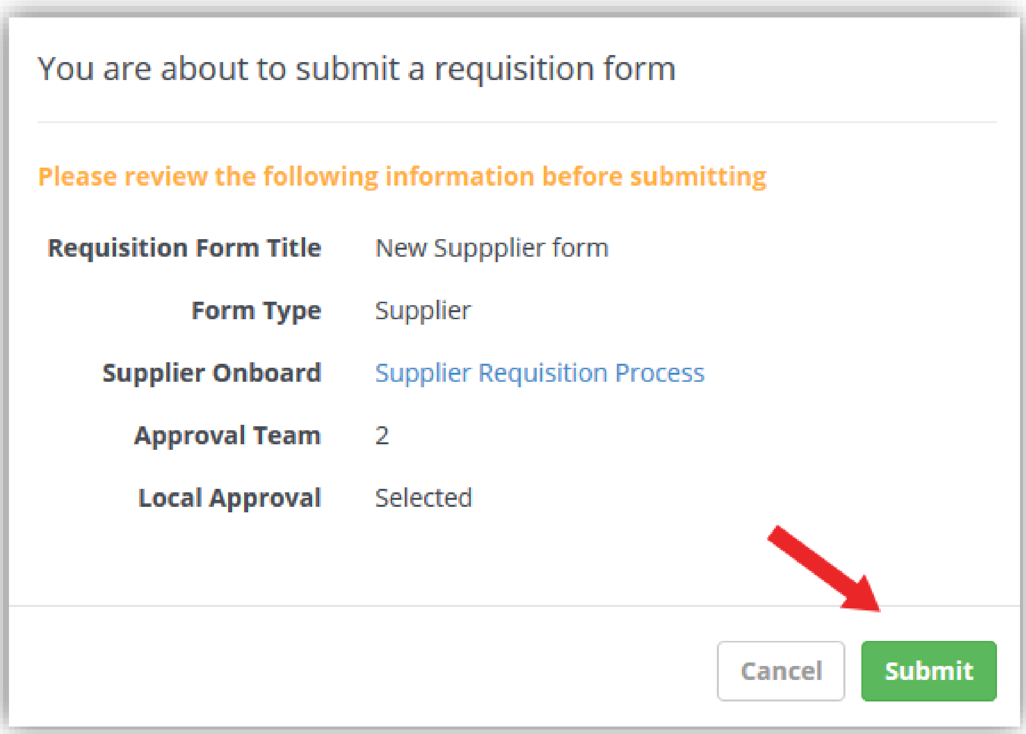
These questions are created in an identical way to the RFx module and information about this can be found here under "Creating Requests" heading. A simple example of the custom questions is shown below. These questions can be customised to your own requirements and can be different in each form created by the Requisition Admin.



When all the content is ready, the user must click on the “Submit” button to activate the form for the Requisition users.

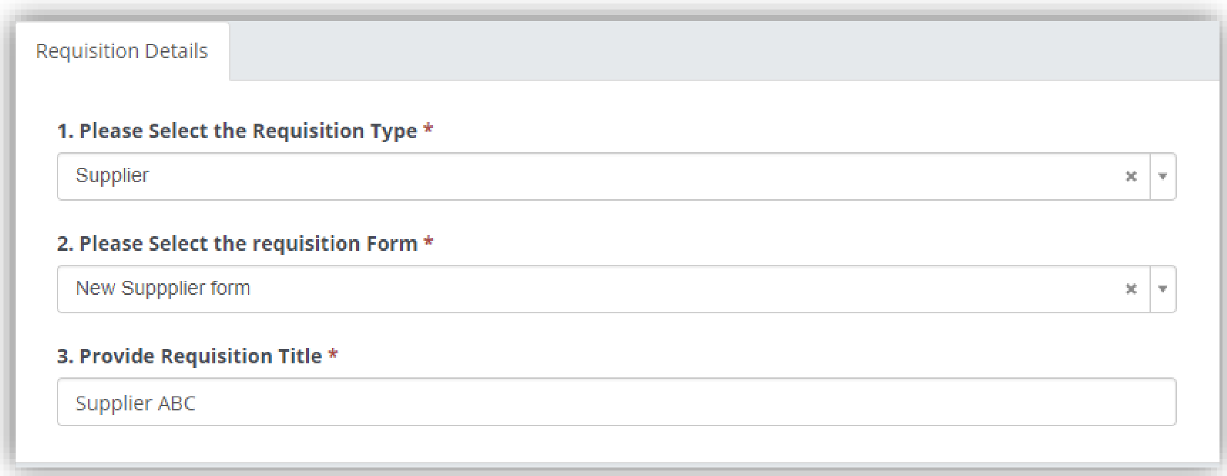


This will display a pop-up window with an overview of the form. To confirm, click on the “Submit” button again. If any mistakes are found, “Cancel” can be selected, which will allow further editing of the form.



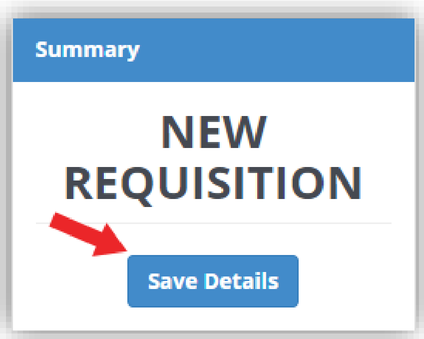
Creating a Supplier Requisition

Creation of a Requisition by the business user starts by clicking on the “Create Requisition” button. This will open the menu where users select what type of requisition they want to create. For a Supplier Requisition, “Supplier” must be selected from the list.

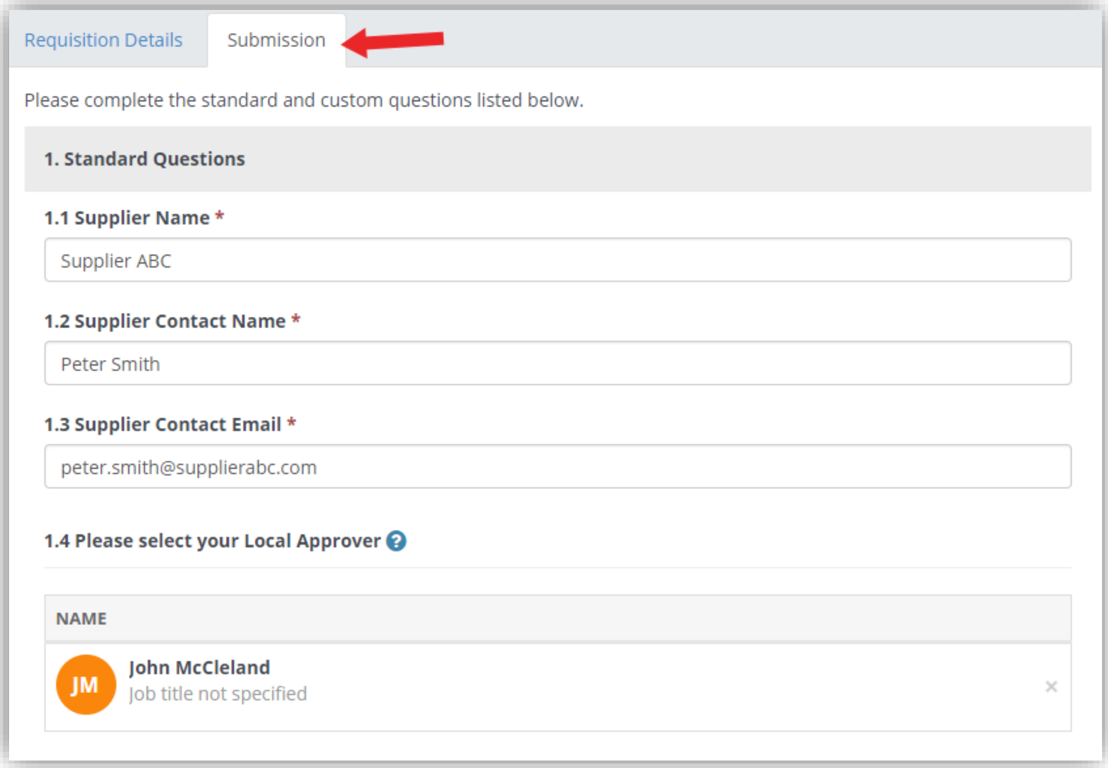


Once “Supplier” is selected from the Type menu, SourceDogg will list all the available requisition forms in the second dropdown list. If an organisation has several Requisitioning forms created, the user can select the most relevant of the form visible to them. The User must also provide a title for their Requisition.

Once all the required information has been added, the user can click on “Save Details” button to continue.

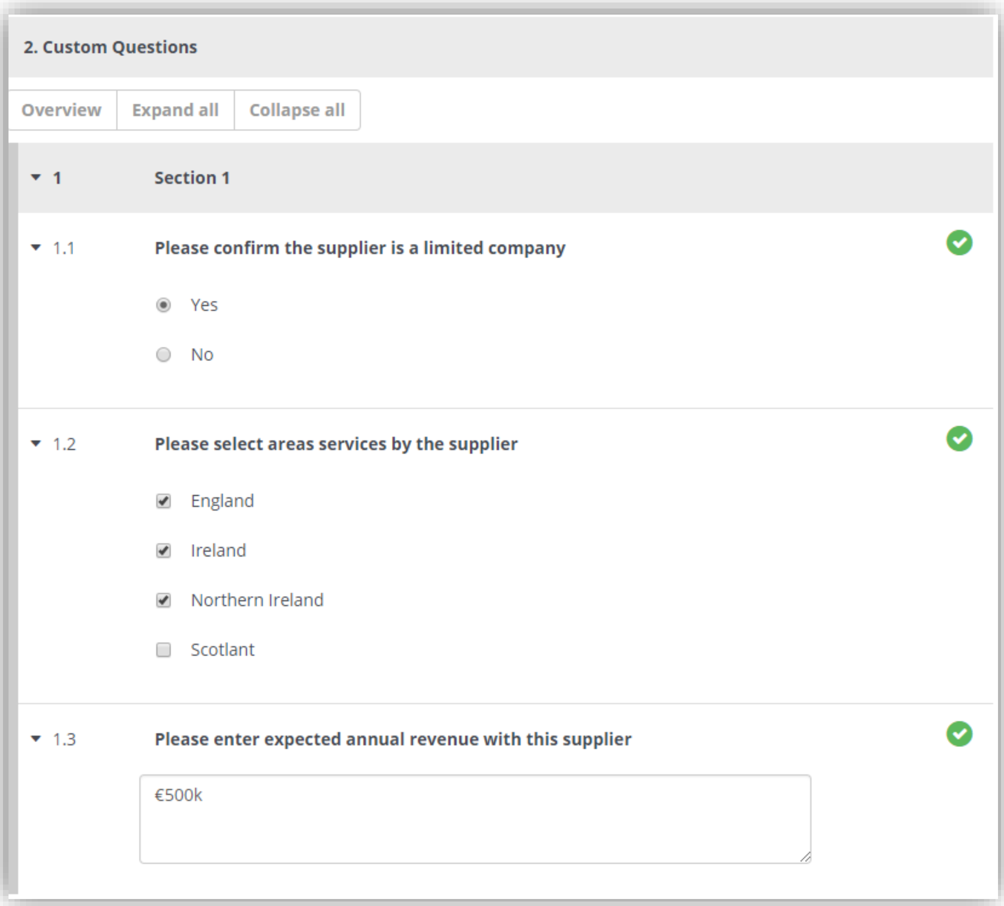


This will create another tab, Submission, where both standard and custom questions must be answered by the business user.

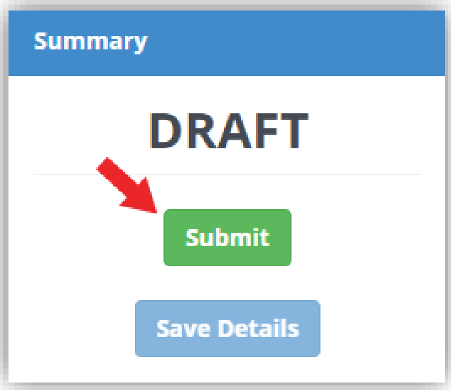


In the standard questions section, the user provides details of the supplier and also selects the name of their local manager that will be required to approve their requisition.

The User creating the requisition also answers the custom questions that were set by the admin user who created the form. These questions can be made mandatory depending on the settings.

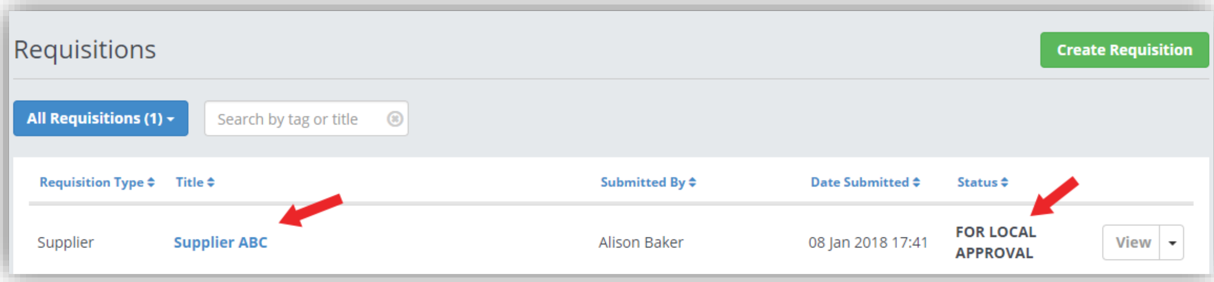


When all the information is entered, the user clicks on “Save Details” and then “Submit” to submit for approval by the Approval team.

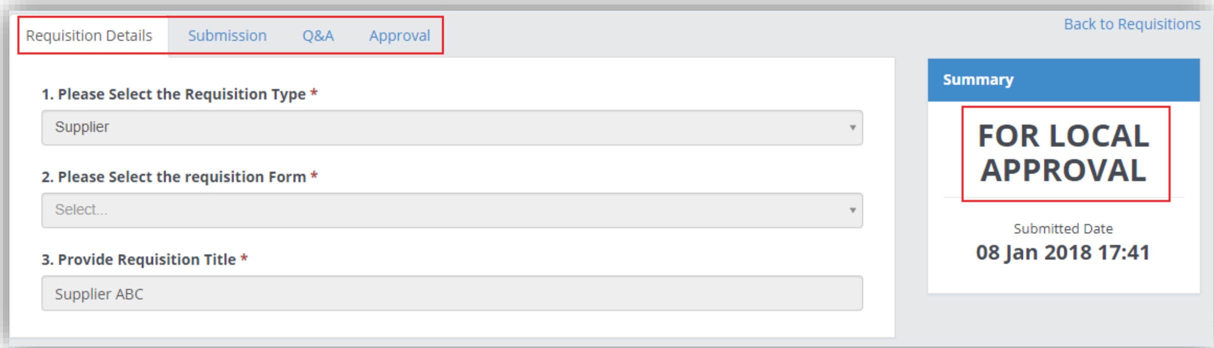


Local Approval

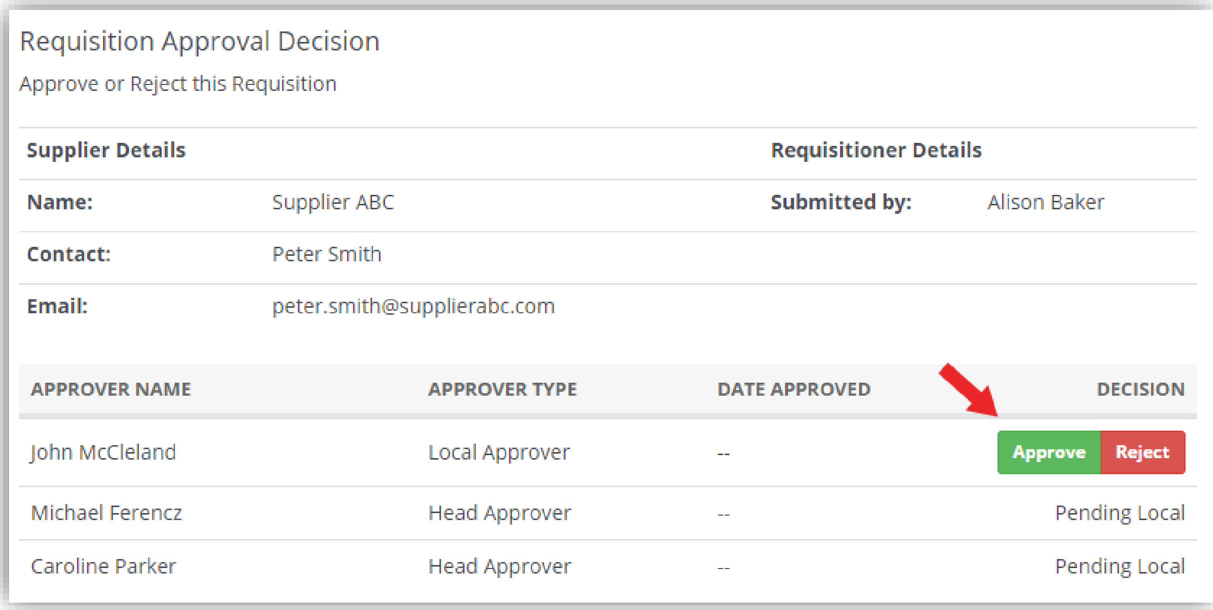
The Requisitions submitted for approval are displayed in the main requisitions screen.



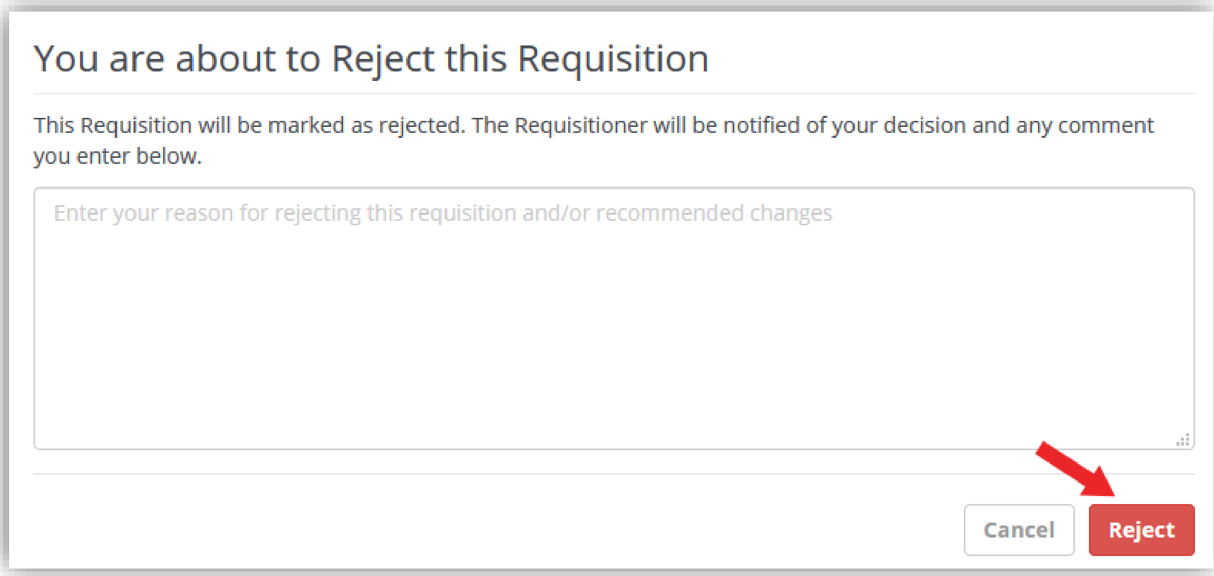
To open the requisition, the user must click on the title of the Requisition or the ‘View’ button.



The Approver can review the information provided by looking at the Submission tab where the answers to custom questions are provided. To approve the requisition, click on the Approval tab and click on the green “Approve” button.

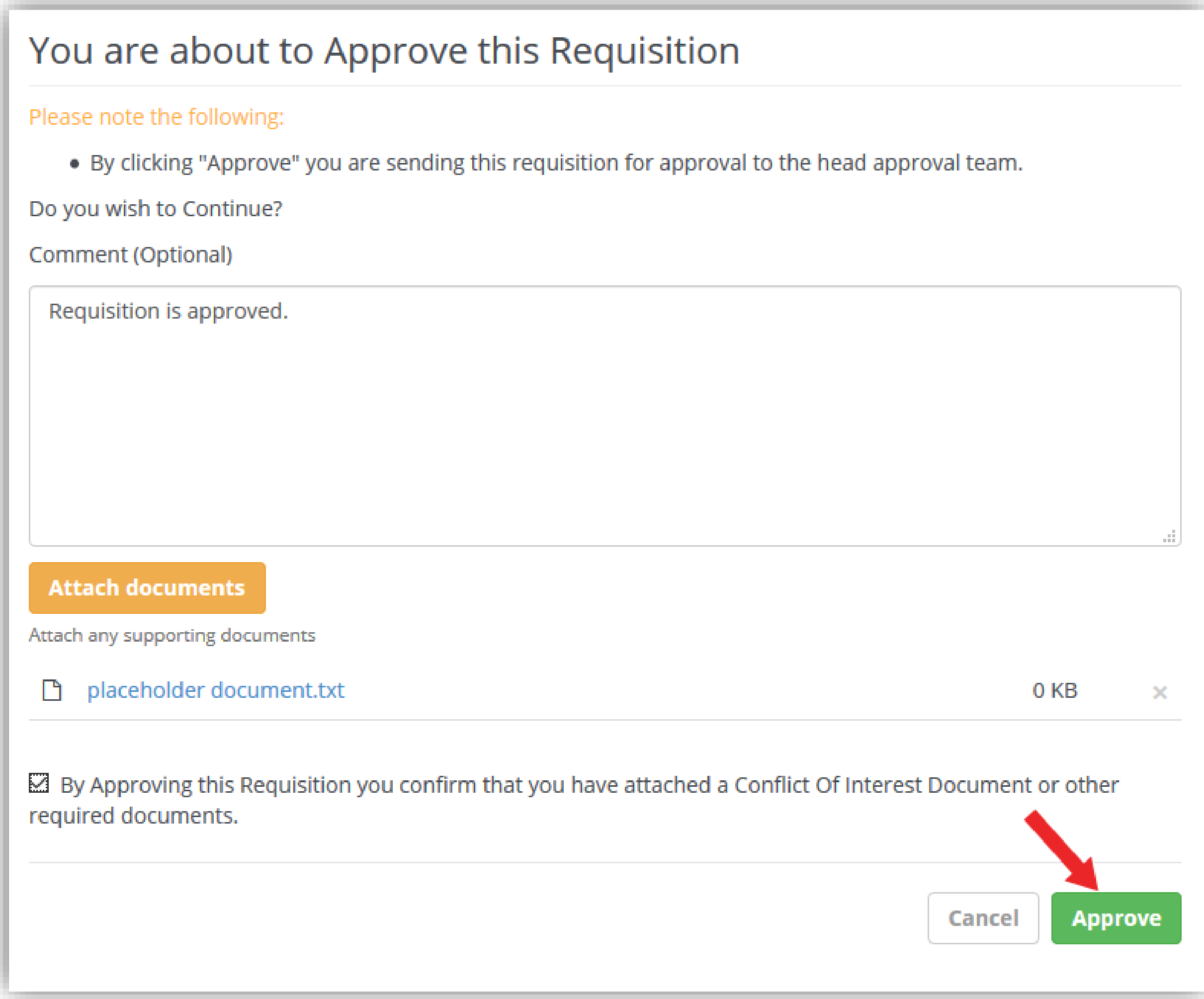


If for any reason, the Local Approver is not satisfied with the Requisition, they can Reject it by clicking on the “Reject” button. The system will also allow the user to enter a message to inform the user why their Requisition was rejected.



After the Requisition is approved by the Local Approvers, it also must be approved by Head Approvers, as selected when creating the form. These would generally be users from central procurement team.

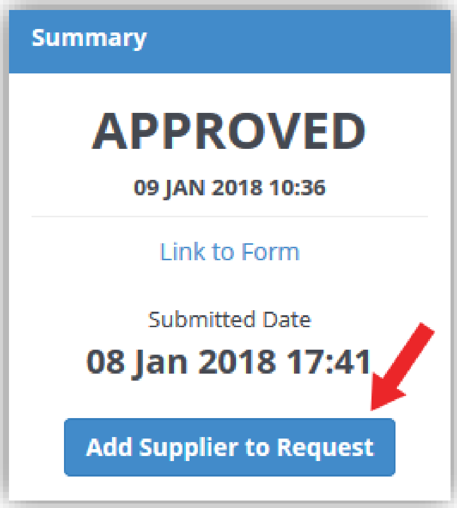
When approving the Requisition, the user is also able to leave an optional comment and also attach files if needed.



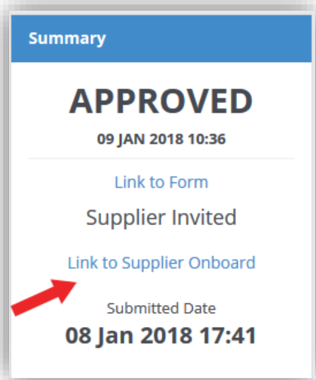
Head Approval

The head approvers also can access the pending Requisitions in the main requisitions screen. In the Approval tab, they are required, just as the Local Approver, to either Approve or Reject the Requisition. They also have the option to leave a comment when approving or rejecting.

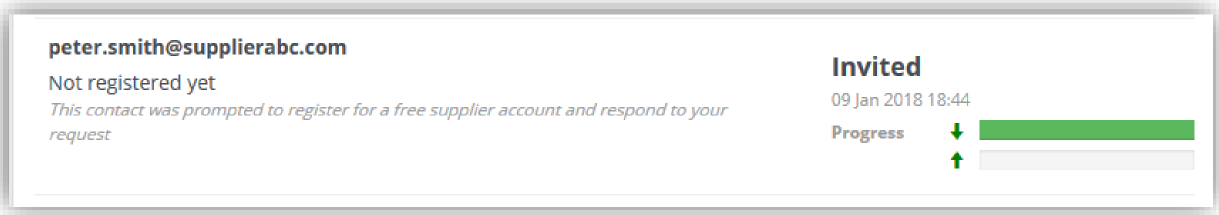
Once all the Head Approvers enter their approval of the Requisition, a new button "Add Supplier to Request" is added to the Requisition. Clicking on this button will add the details entered by the business user to the pre-selected Supplier On-board questionnaire and automatically invite the supplier to register and start answering the Continuous Supplier On-boarding form.



This will also create a link to Supplier On-board.

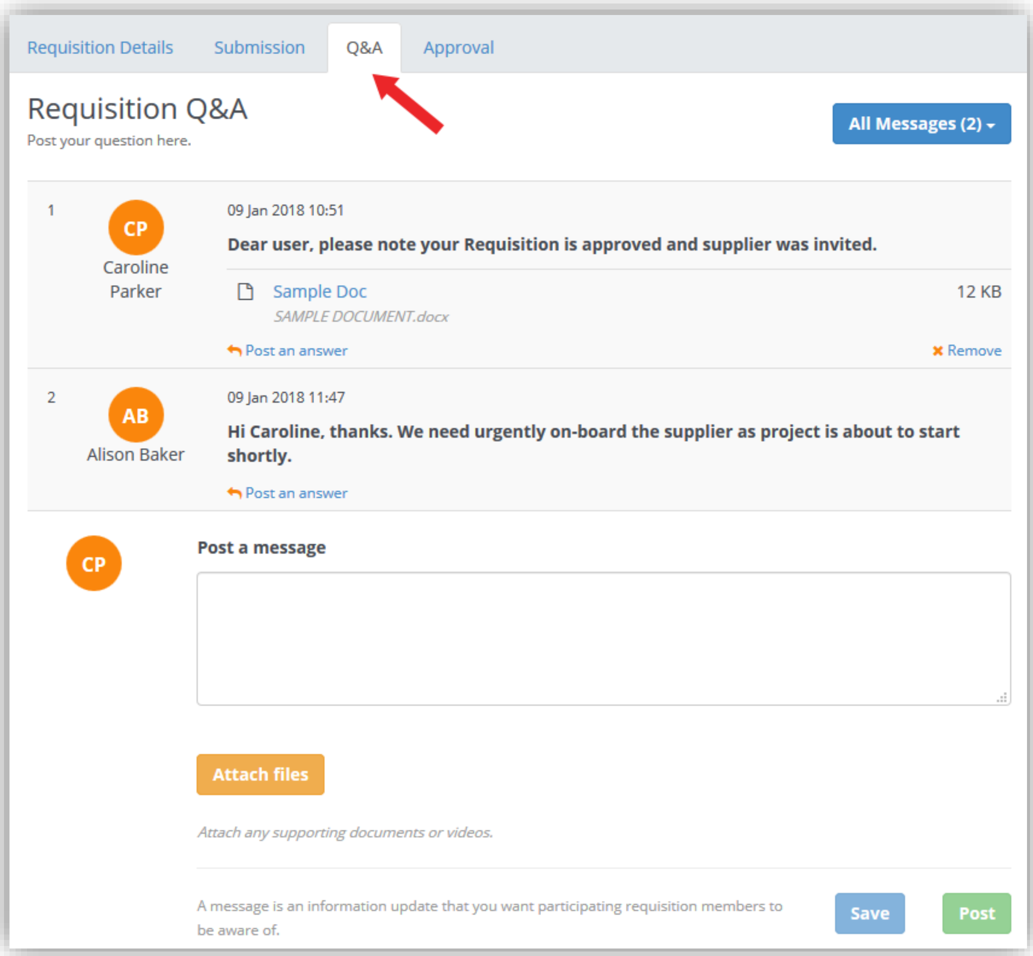


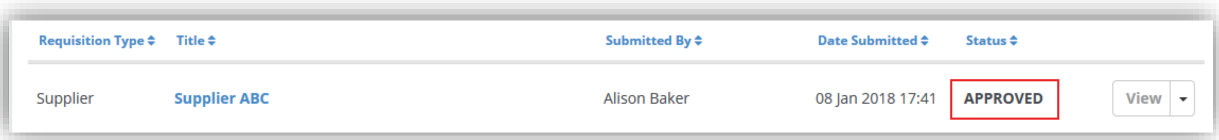
Clicking on the link will open the Supplier On-boarding form where the supplier invitation status can be monitored, e.g. if the supplier has registered, accepted the invitation, or answered the questionnaire.



Q&A

The Q&A message board can be used to gain further clarification or for general communication between team members about the progress in the Requisition. The requisitioner is also updated by changes in the status of their Requisition.


Requisition Details
Submission
Q&A
Approval
Requisition Q&A
Post your question here.
All Messages (2)
1
CP
Caroline Parker
09 Jan 2018 10:51
Dear user, please note your Requisition is approved and supplier was invited.
Sample Doc
SAMPLE DOCUMENT.docx
12 KB
Post an answer
Remove
2
AB
Alison Baker
09 Jan 2018 11:47
Hi Caroline, thanks. We need urgently on-board the supplier as project is about to start shortly.
Post an answer
CP
Post a message
Attach files
Attach any supporting documents or videos.
A message is an information update that you want participating requisition members to be aware of.
Save
Post

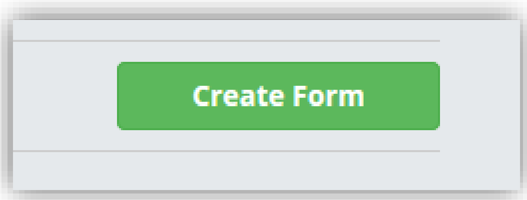

Requisition Type
Title
Submitted By
Date Submitted
Status
Supplier
Supplier ABC
Alison Baker
08 Jan 2018 17:41
APPROVED
View

Product & Service Requisitioning

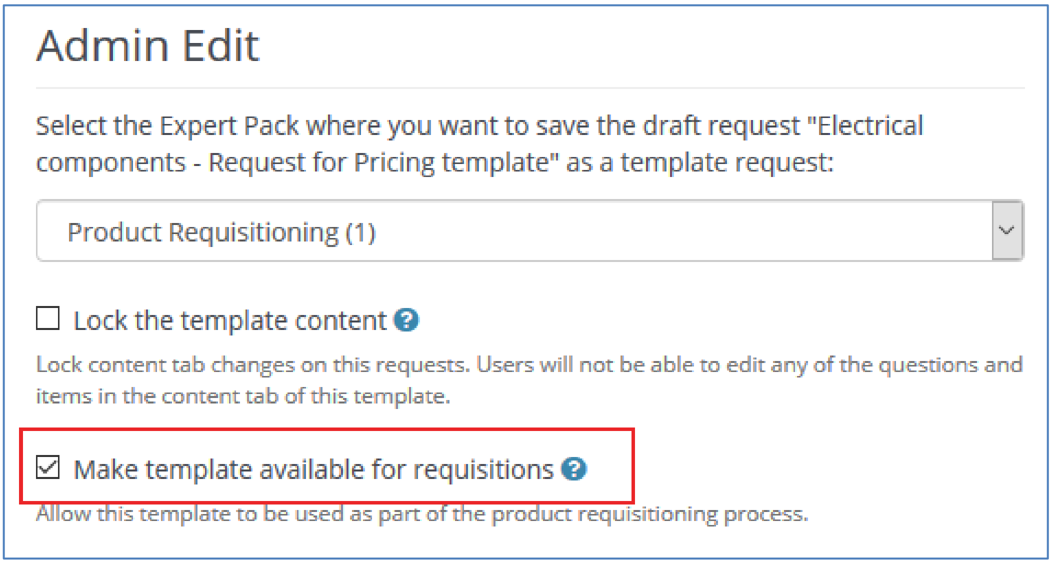
Requisitions for products and services work in a way similar to Supplier Requisitions.

Creating product and/or service requisitioning form

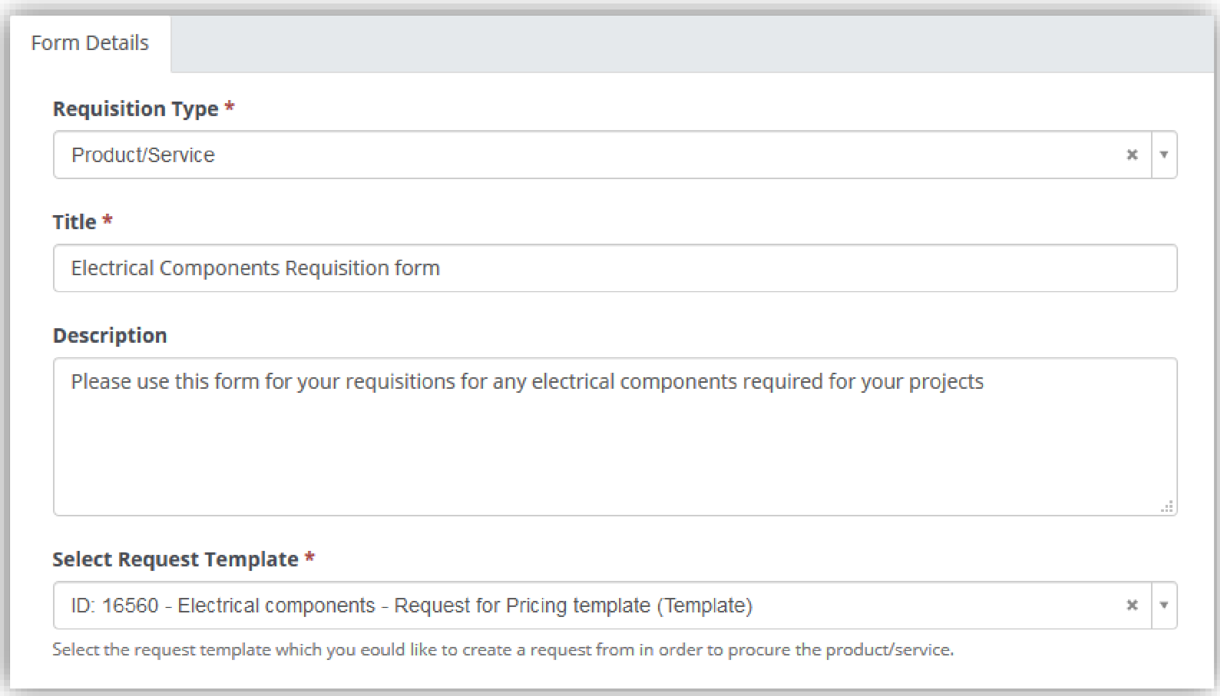
A new form can be created by clicking on the “Create Form” button from the requisitions main screen.



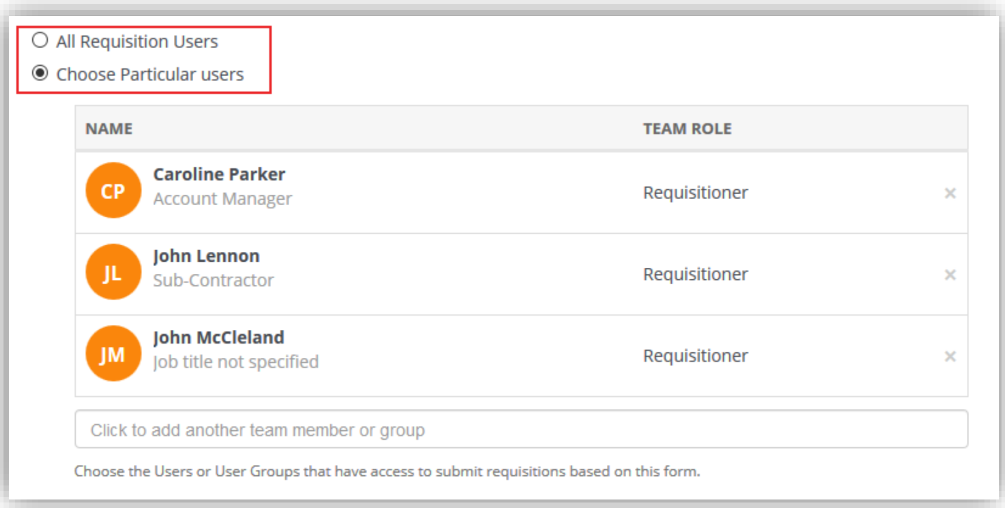
In the next page, the basic details must be entered. The User must select the “Product/Service” option from the Requisition Type menu, then enter the title and the description of the form. In the ‘Select Request Template’ dropdown, the user picks one of the existing templates. This template will be used to create RFx events once approved by the Approval Team. The prerequisite for the template to be used for requisitions is that it MUST have this setting checked and contain at least one Item question type (e.g a product or service question).



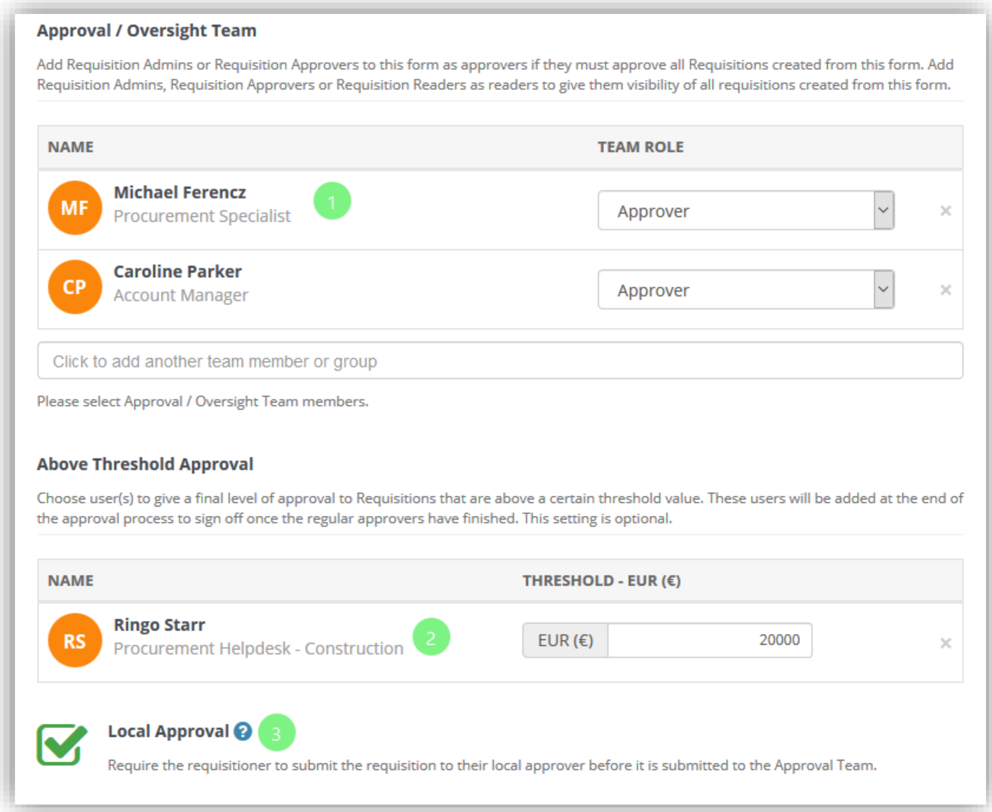
Once the basic information is entered, the screen will look like the below:



As a next step, the user must select the currency for the requisition and business users that will be granted access to this form. Access can either be granted to all requisitioners or only a selected group of users.



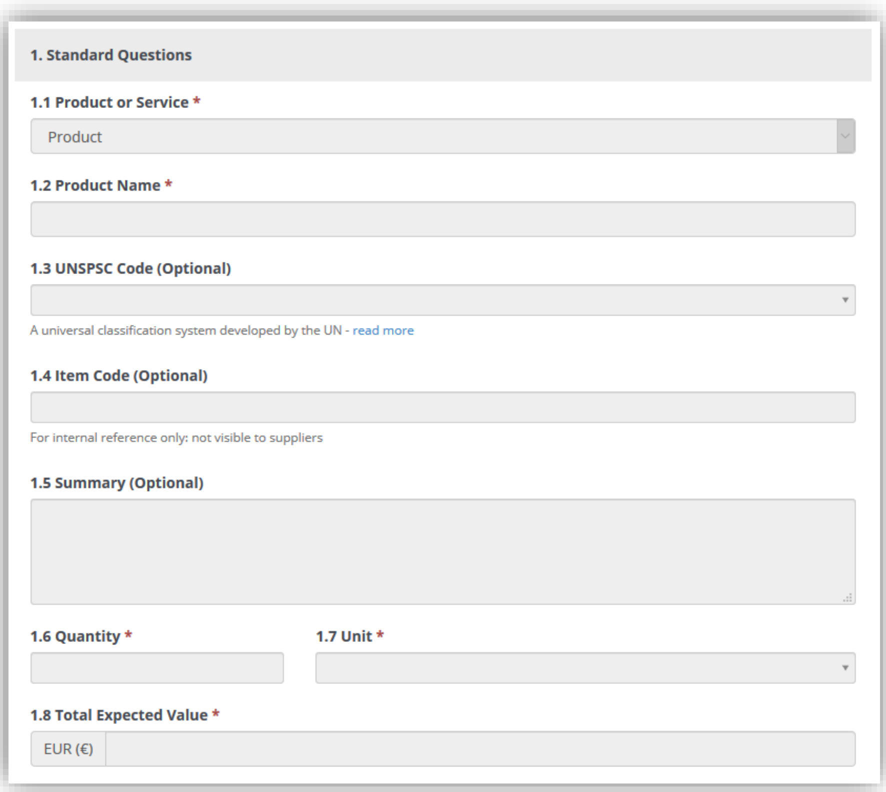
In product /service requisitioning up to 3 levels of approval can be activated. These are all described below:



1. **Approval / Oversight Team** – these are users responsible for final approval of the requisition, generally, it would be personnel from the procurement/buying team
2. **Above Threshold Approval** – this user is only required to approve the Requisition if its value is over a defined threshold. This threshold is entered when a form is being created. In the example above the threshold is 20000 Eur.
3. **Local Approval** – if this option is selected, the Requisitioner must select/add their local manager when creating a requisition. This will be the first stage of an approval.

Once all information is entered, the user must click on the “Save Details” button to continue. This action will add the “Content” tab where custom questions can be added, just as with the Supplier Requisitions here.

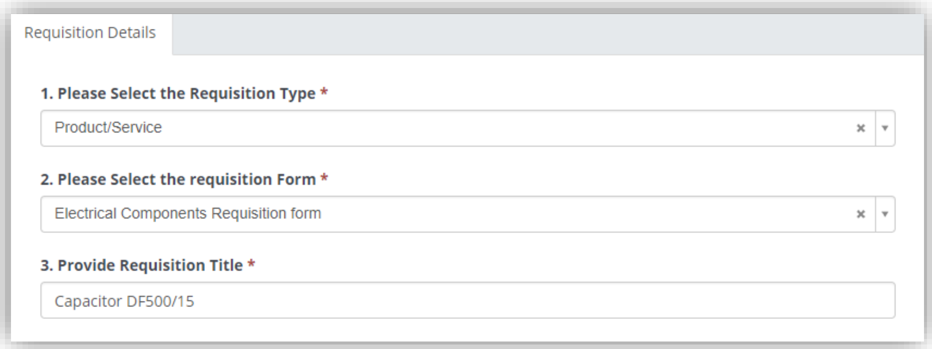
The Standard Questions for product/service requisitioning differ from the supplier requisitioning as it contains the default information about the product that is required, such as product name, item code, description or the quantity and value of the product. Please see the picture below as an example:

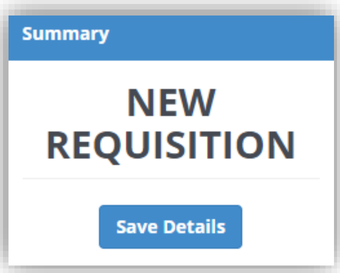


When the content of the form is prepared, the user clicks on “Save Details” and then on “Submit” button to make the Requisition form available.

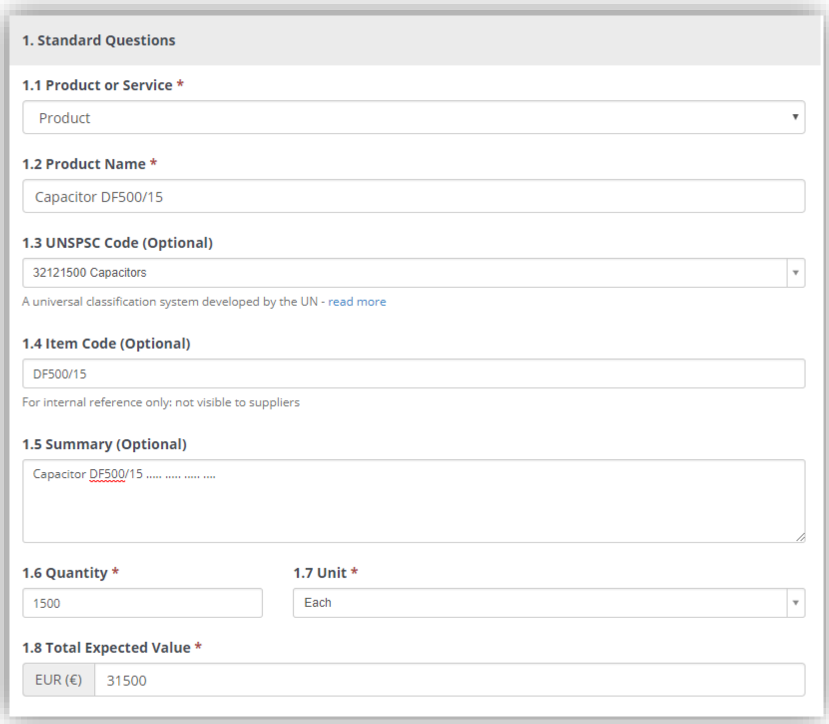
Creating a Product / Service Requisition

The process of creating a product requisition is similar to one described above. First, the business user clicks on the Create Requisition button and fills the information required and click on “Save Details” button.

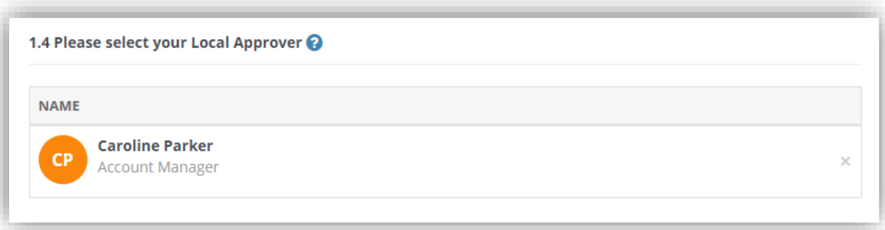




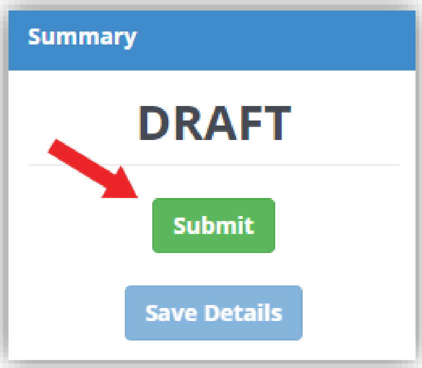
This will open the "Submission" tab where the details of the product must be entered as well as custom questions answered, as on the example below.



Requisitioner also selects their Local Appover, if this was selected in the Form.



In the next step, when all the details are entered, the user must click on “Submit” button to finish their Requisition.



Local Approval

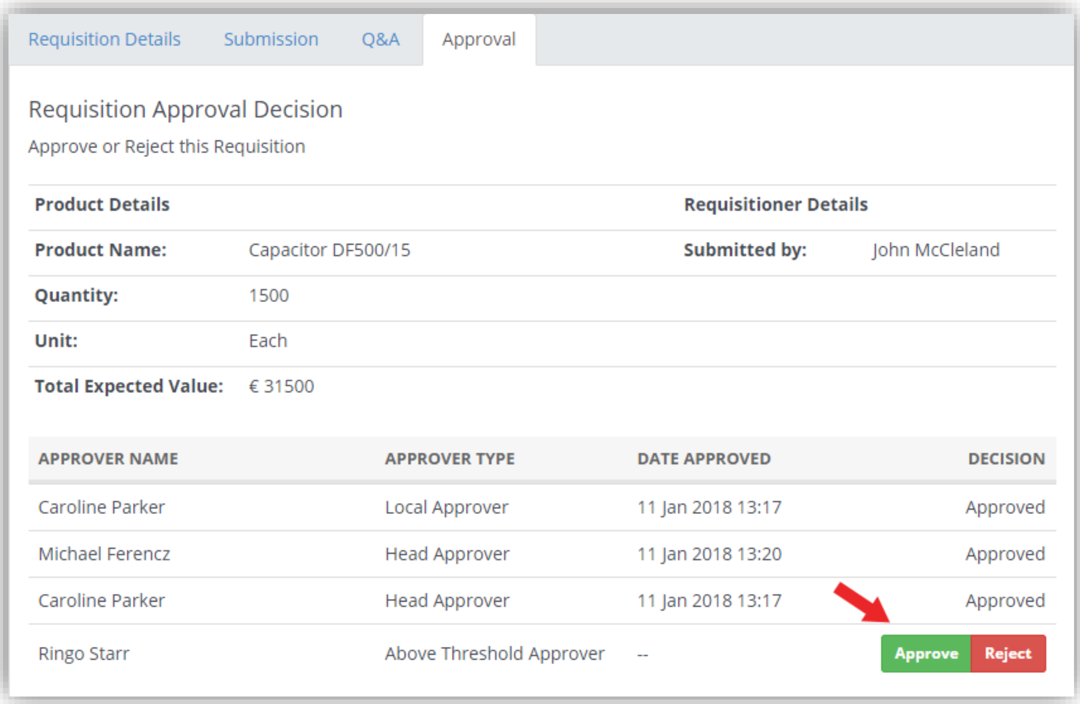
The Local Approval is identical to the Supplier Requisitioning.

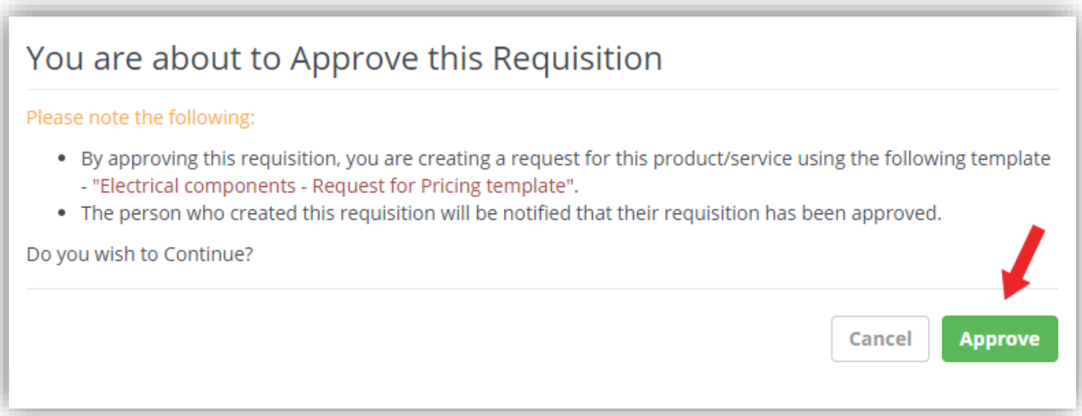
Head Approval

The Head Approval is identical to the Supplier Requisitioning.

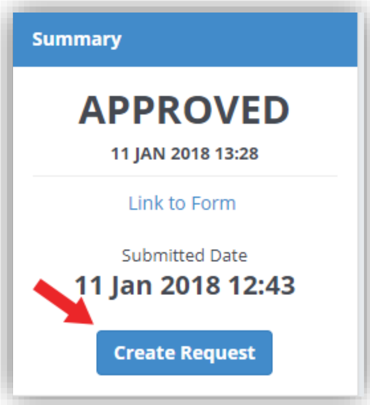
Above the Threshold Approval

This type of approval is only required if the amount of the Requisition exceeds the threshold defined in the Requisition form. The Approver clicks on Approve or Reject button and this is the final Approval required to process the Requisition.

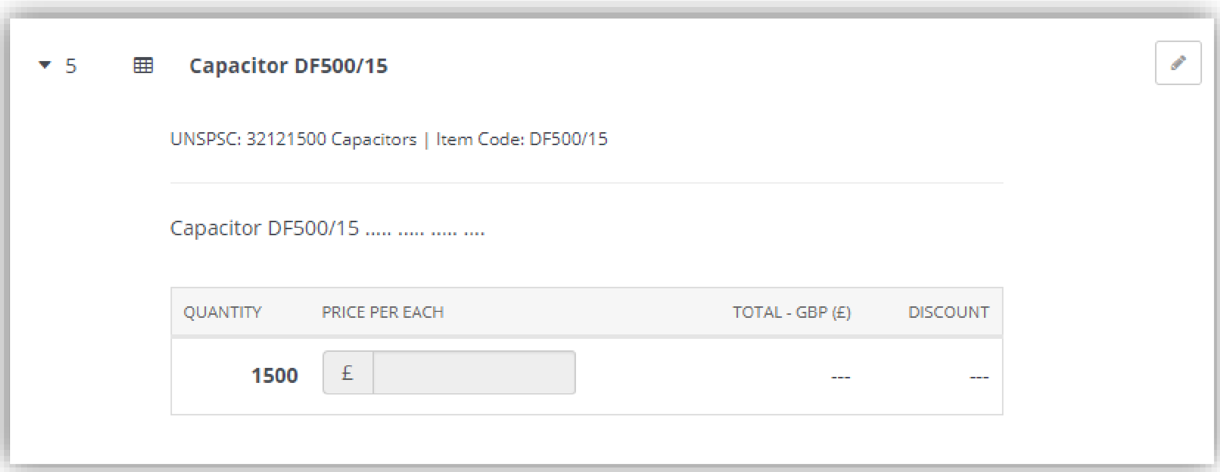




When all the approvers have approved the Requisition, it is then possible to create a new request based on the template selected in the Form, this is done by admins by clicking on "Create Request".



The product or service described in the requisition will then be added to the request template where suppliers can be invited to bid on.



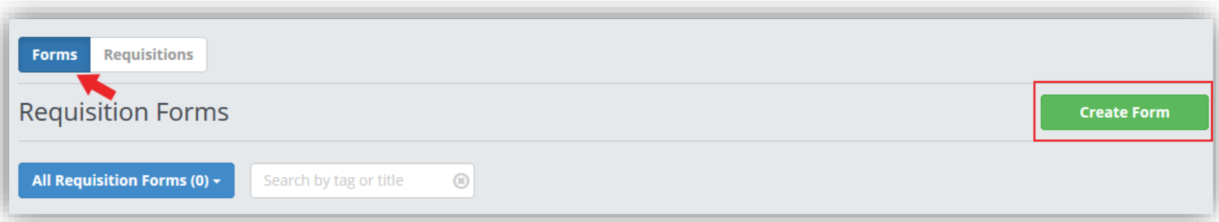
Purchase order

Creating Purchase Order form

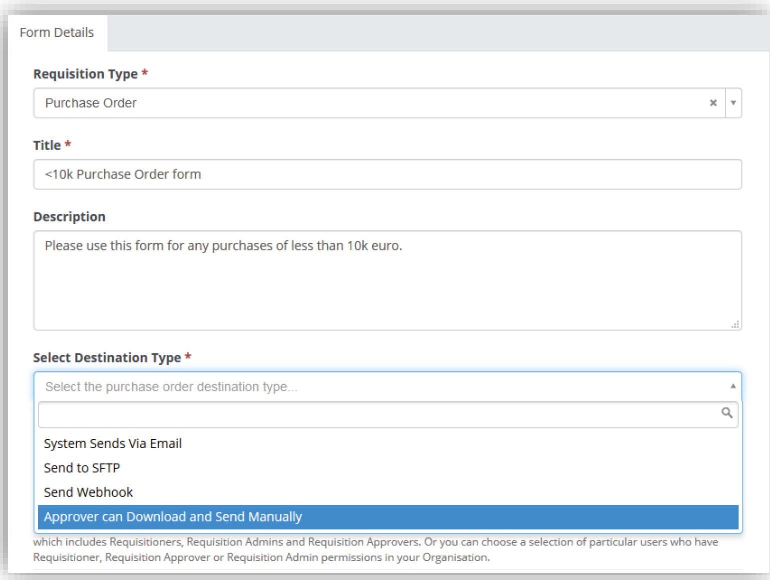
Like with the Supplier and Product/Service requisitions, the Purchase order workflow starts with the procurement team who creates PO Requisition form, selecting one of the several options how the PO will be generated and sent to the supplier. The options that can be selected are:

1. System Sends Via Email
2. Send to SFTP
3. Send Webhook
4. Approver can Download and Send Manually

To create a new form, click on the "Create Form" button on the main Requisitions page.

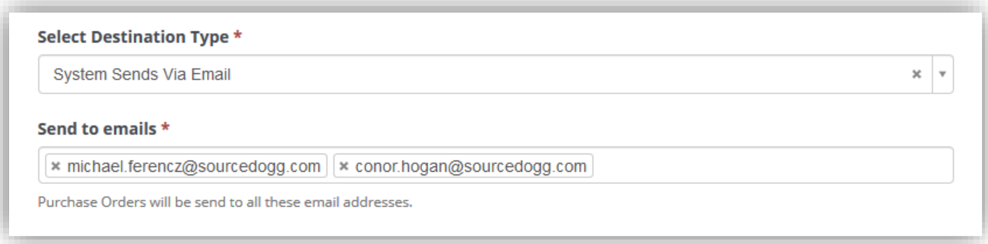


From the next screen, select the "Purchase Order" option and enter the Title and Description for your form. In the "Select Destination Type" select one of the options described above. This determines how the PO document will be generated and who will receive it.

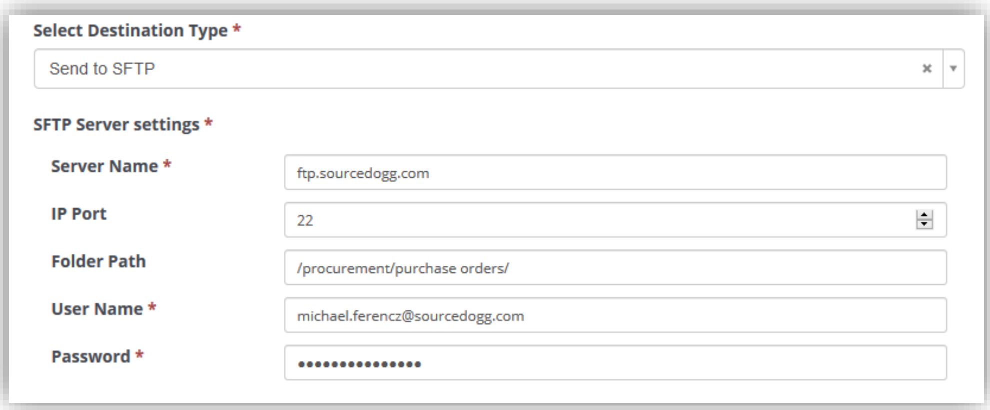


All 4 options will be described below:

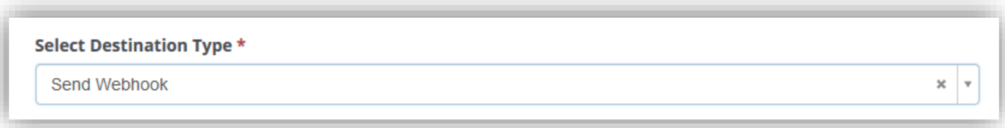
1. **System Sends Via Email** – using this option will allow you to enter multiple recipients for generated Purchase Orders, once approved these will be delivered to all email addresses entered in this setup page.



2. **Send to SFTP** – with this option the generated Purchase Orders will be uploaded to secure FPT server. In this screen, you need to enter all settings of the server.

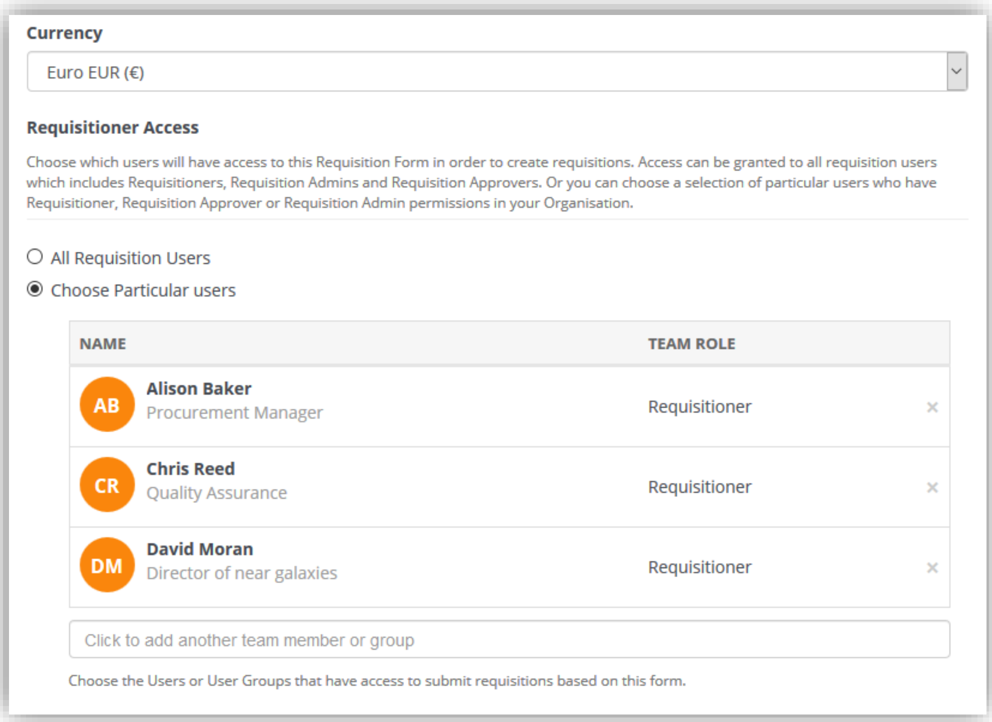


3. **Send Webhook** – this setting will trigger further action as set in the Integration Webhooks area of the settings. Set up the webbook prior to using this option in the requisition form. For assistance with the setup of webhook please contact us at customerservice@sourcedogg.com

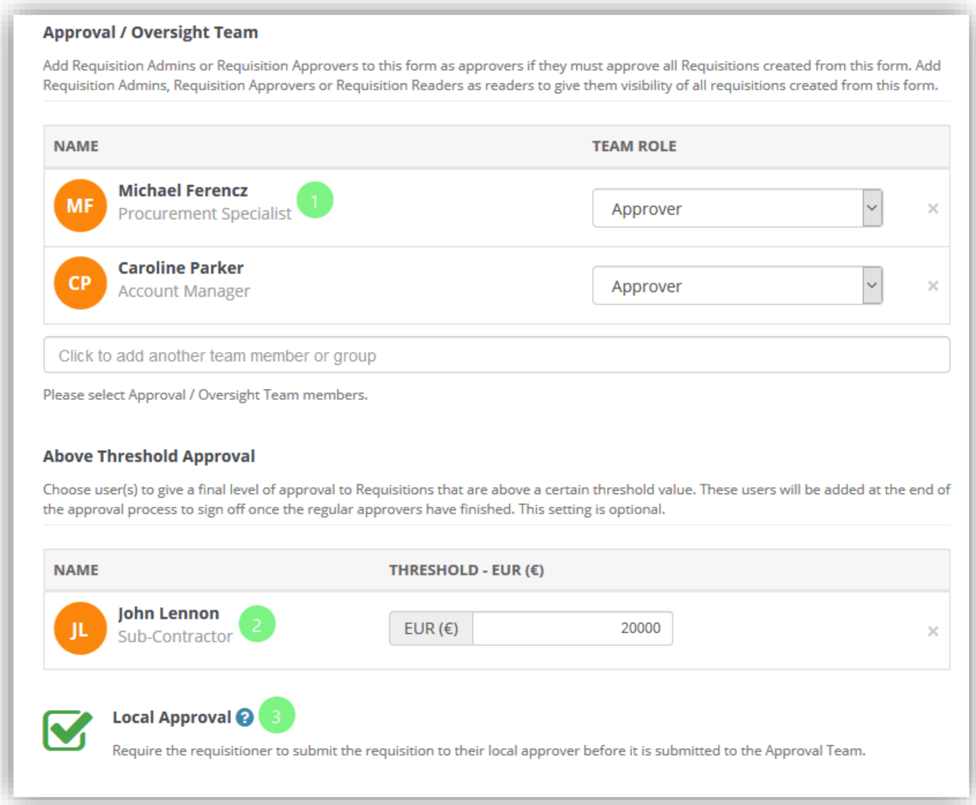


4. **Download and Send Manually** – this option will allow the Approver to download the generated PO directly from SourceDogg and then manually share it will supplier or stakeholder as required.

In the next step in setting up the Purchase Order Form, you must select the Currency and decide which Requisition users will be able to access this form. The access can be granted to all Requisition user or to a selected group defined in the settings as on below screenshot.

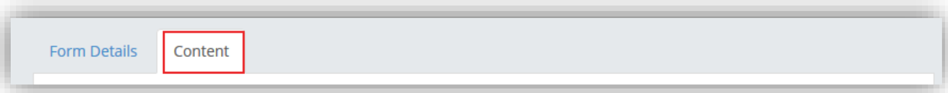


Following the setup of the requisition users, the Approval team must be selected. These are users that will be responsible for approval of the Purchase Orders. There are several categories or Approvers, all explained in the below screenshot.



1. **Approval / Oversight Team** – these are users responsible for final approval of the Purchase Order, generally, it would be personnel from the procurement/buying team
2. **Above Threshold Approval** – this user is only required to approve the Purchase order if its value is over a defined threshold. This threshold is entered when a form is being created. In the example above the threshold is 20000 Eur.
3. **Local Approval** – if this option is selected, the Requisitioner must select/add their local manager when creating a Purchase Order. This will be the first stage of an approval.

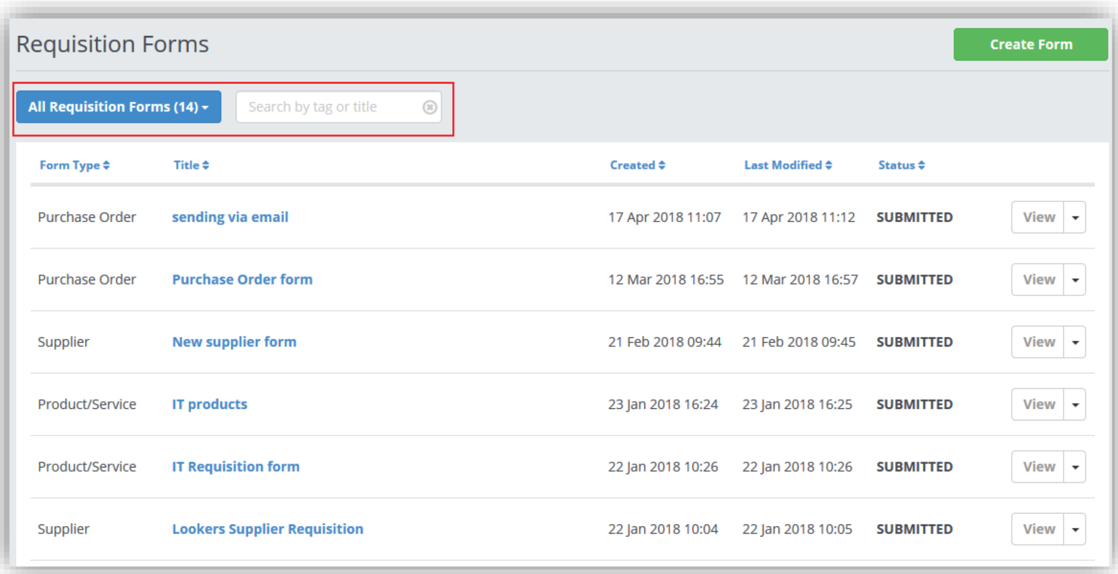
Once all information is selected, click on the Save Details button that will add a Content Tab to the Form. Here you can customise the questions that a Requisition user creating a PO must answer before submitting their request.



These questions are created in an identical way to the RFx module and information about this can be found here under “Creating Requests” heading.

Once all content is added, you can click on the Submit button that will finish the Form. It will now be available for use to all users defined in the Requisitioner Access.

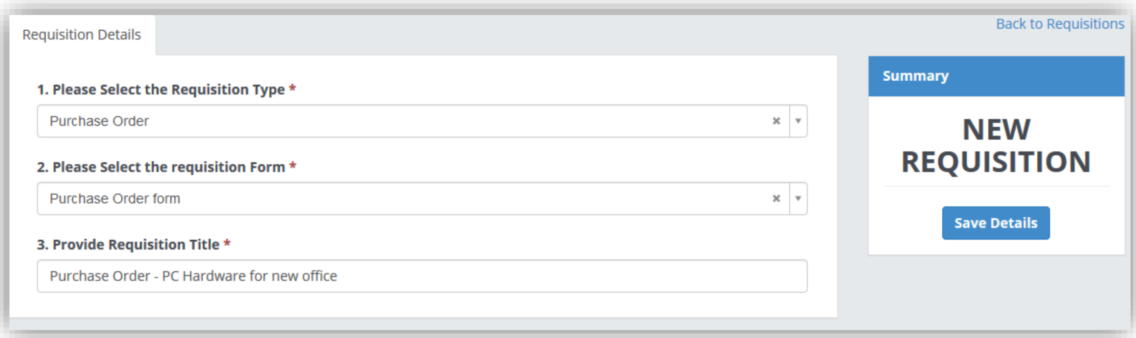
To see all the current forms, you can visit the main Requisitions Module screen, where these are listed. You can filter down on the type of form using the blue button in the top left part of the page. You can also search the form by entering the title into the search box and hitting Enter.



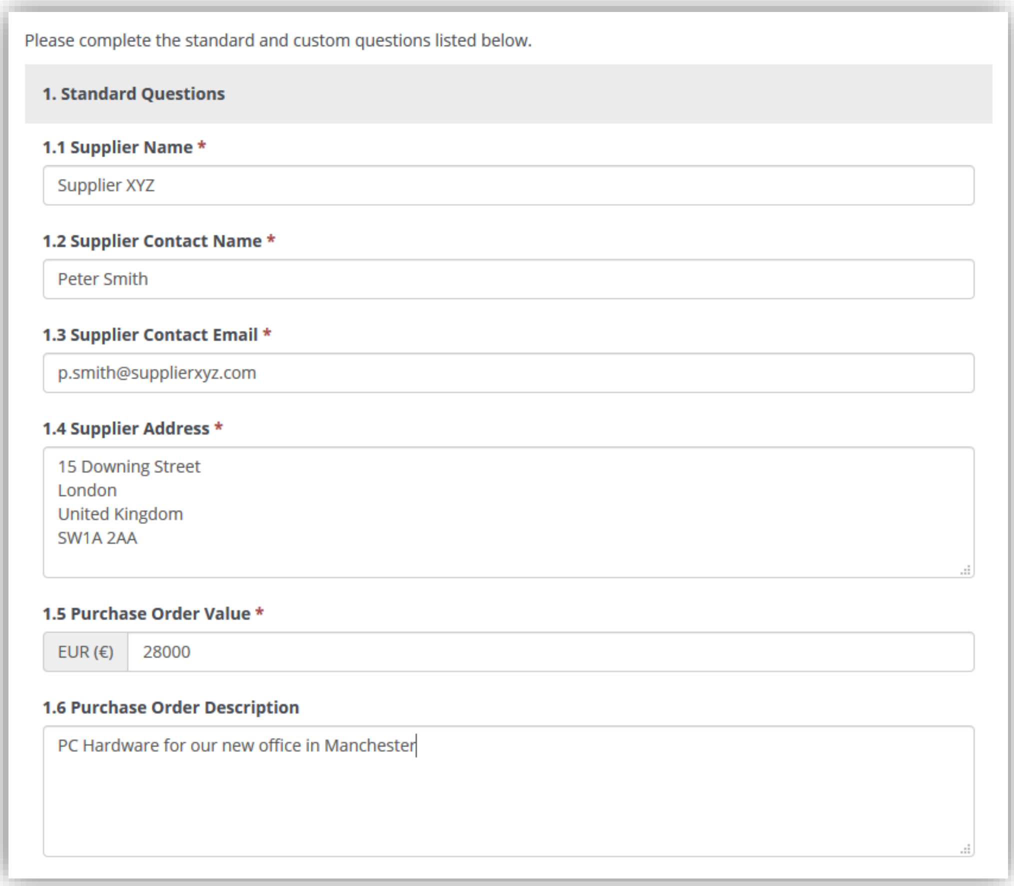
Creating a Purchase order

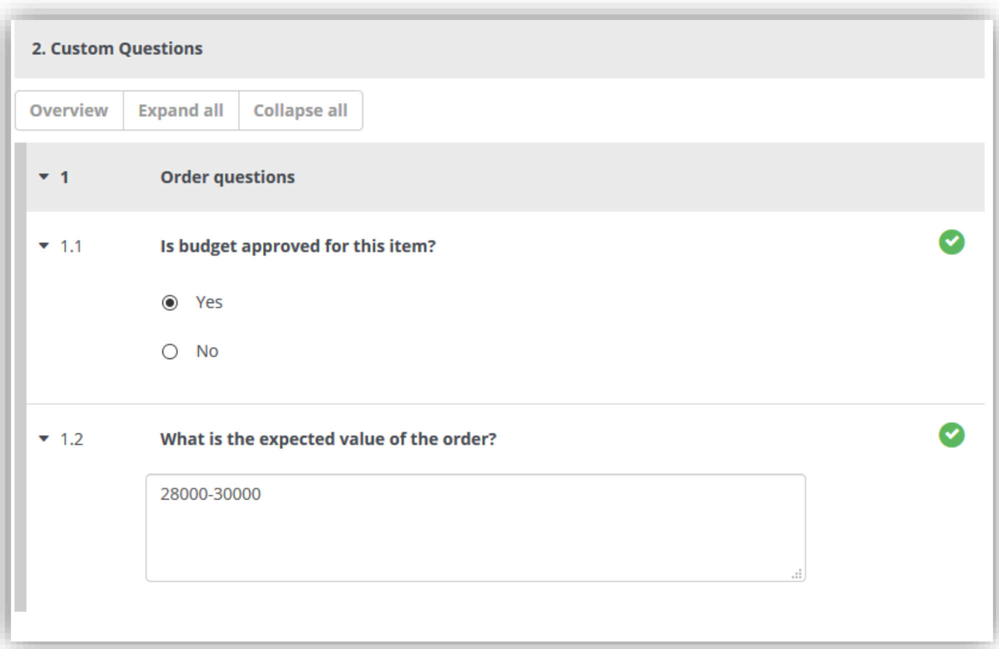
Creation of a Purchase Order by the business user starts by clicking on the "Create Requisition" button. This will open the menu where users select what type of requisition they want to create. For a Purchase Order, the user must select "Purchase Order" from the list and then select the appropriate form from the list.

The Requisitioner then provides the title of their Purchase Order and clicks on the "Save Details" button.

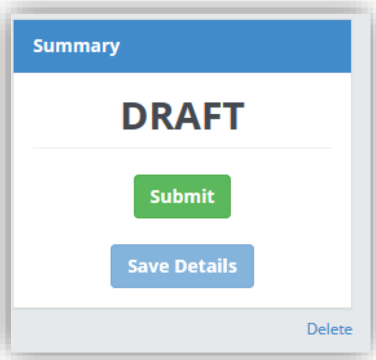


As with other types of Requisitions, this will add a new tab – Submission. This is where the user enters the mandatory details of the products or service to be added to Purchase Order and answers the questions set up in the form.

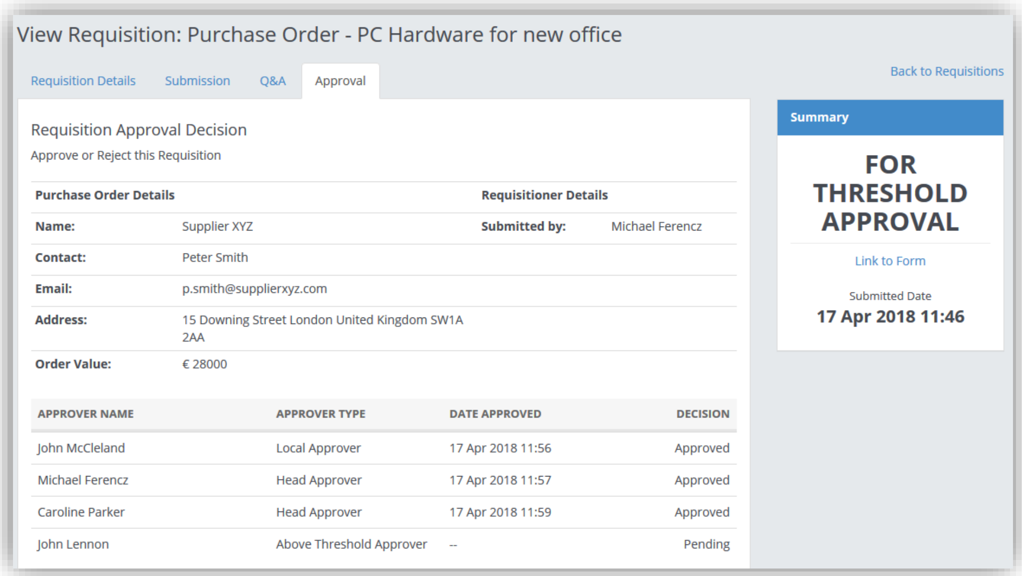




When all the questions are answered, the user clicks on "Save Details", followed by "Submit" button.



This action will add two more tabs, the Q&A, and Approval. The Q&A can be used to communicate with the other team members, as described already in this document. In the Approval tab, all users responsible for approving the Purchase order are listed and Requisitioner is able to monitor the status of approvals, e.g. if the approvers have already approved the Purchased Order and when they have done so.



Local Approval

The Local Approval is identical to the Supplier Requisitioning.

Head Approval

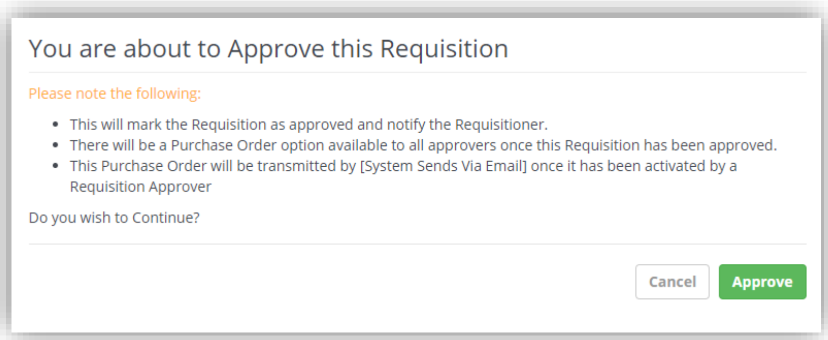
The Head Approval is identical to the Supplier Requisitioning.

Above the Threshold Approval

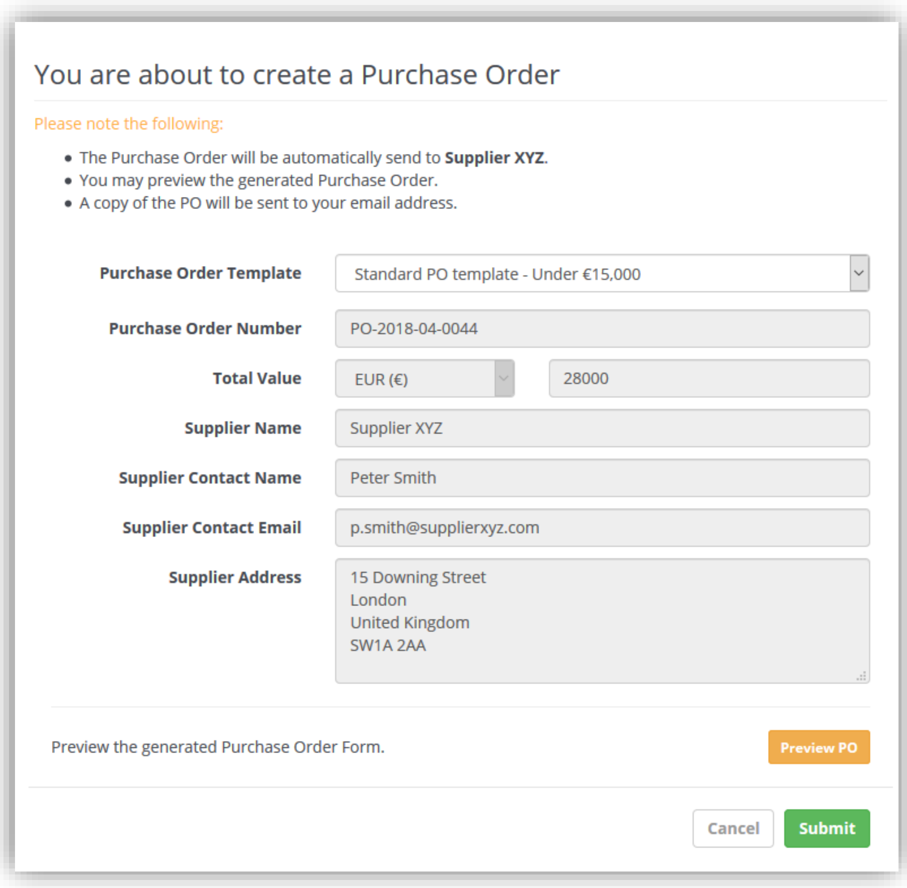
The Above the Threshold Approval is identical to the Product & Service Requisitioning

Generating the PO document

Depending on the on settings in the Purchase Order Form, the PO document will be generated after all the Approvers approve the Purchase Order.



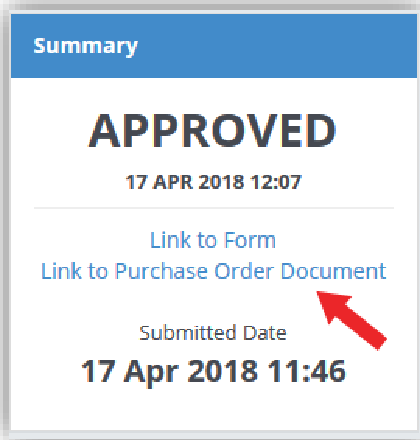
The “Create Purchase Order” button will be available to all Approvers. Once clicked, the below pop up window will be displayed.

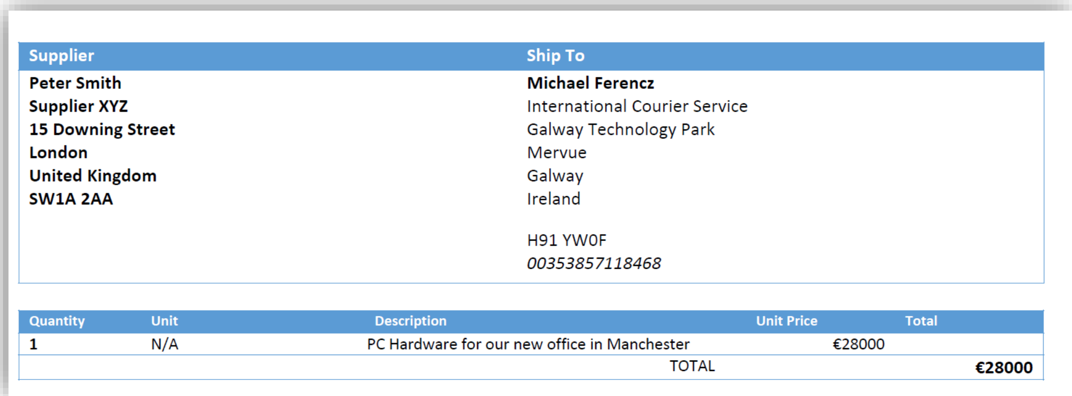


When creating the PO, the Approvers can select the template that will be used to generate the PO. Simply click on the “Purchase Order Template” dropdown list and select one of the options. The rest of the details displayed on the page are taken from the Purchase order requisition and are non-editable. In the last step click on the Submit button. The PO document will be delivered as per set up of the Purchase Order Form:

1. System Sends Via Email
2. Send to SFTP
3. Send Webhook
4. Approver can Download and Send Manually

Irrespective of which of the above options is used, all Approvers will have access to a link that will allow them to download the purchase order document.





Supplier	Ship To
Peter Smith	**Michael Ferencz**
Supplier XYZ	International Courier Service
15 Downing Street	Galway Technology Park
London	Mervue
United Kingdom	Galway
SW1A 2AA	Ireland
	H91 YW0F
	00353857118468

Quantity	Unit	Description	Unit Price	Total
1	N/A	PC Hardware for our new office in Manchester	€28000	
		TOTAL		**€28000**