

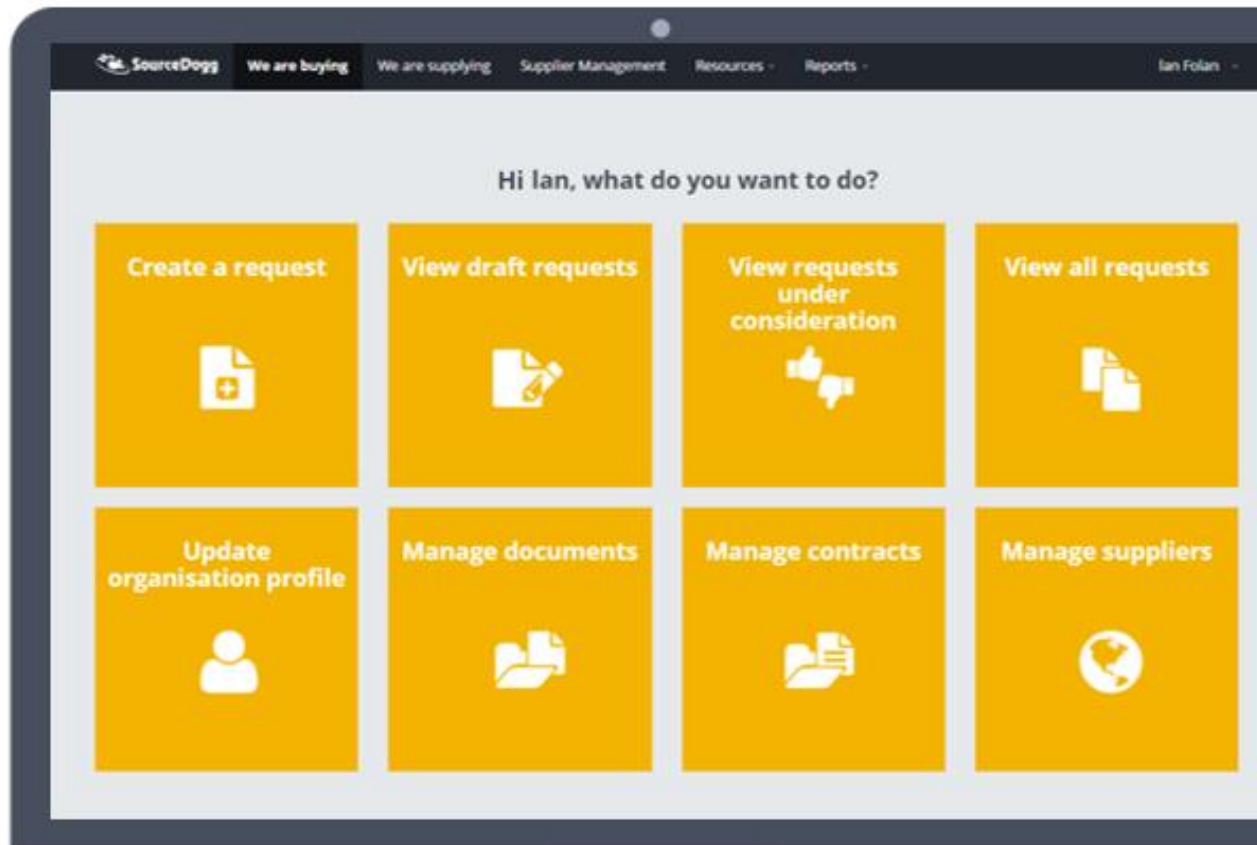


SourceDogg

Requisitioning Module

User Guide

Date: April 2018



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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

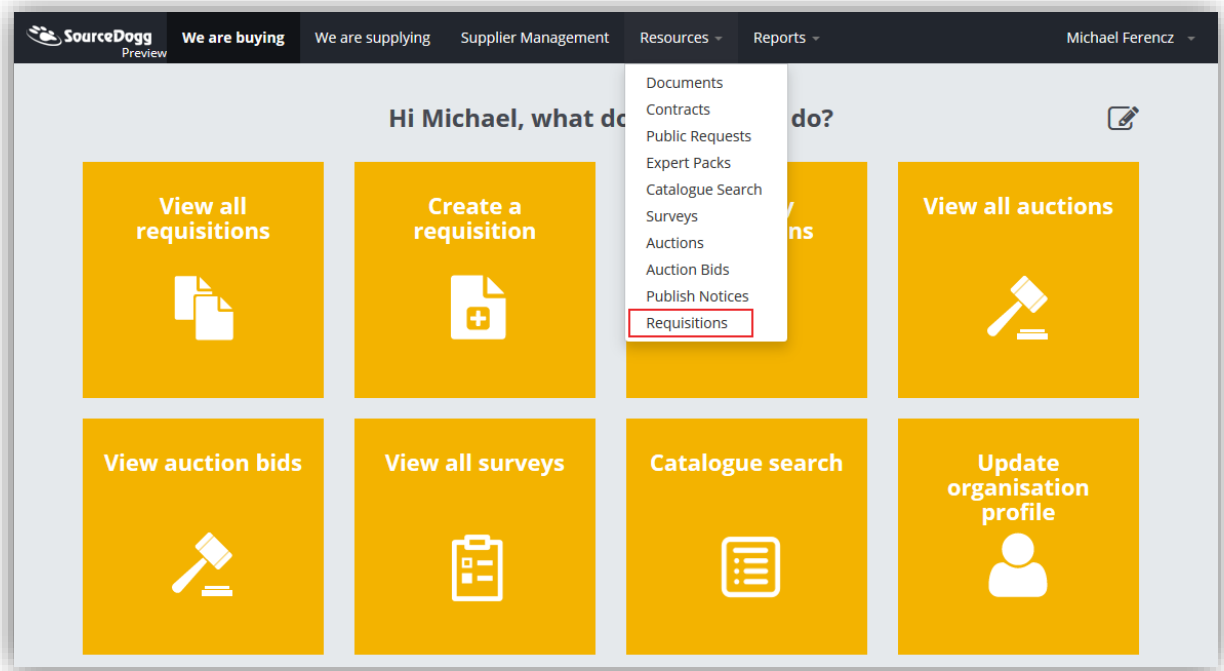
- Allows business users to request a product or service
- They enter the specification of the product/service they require which then goes through local management and procurement team approval
- Once all approvals are submitted, the product or service is added to a linked RFx template
- Procurement 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

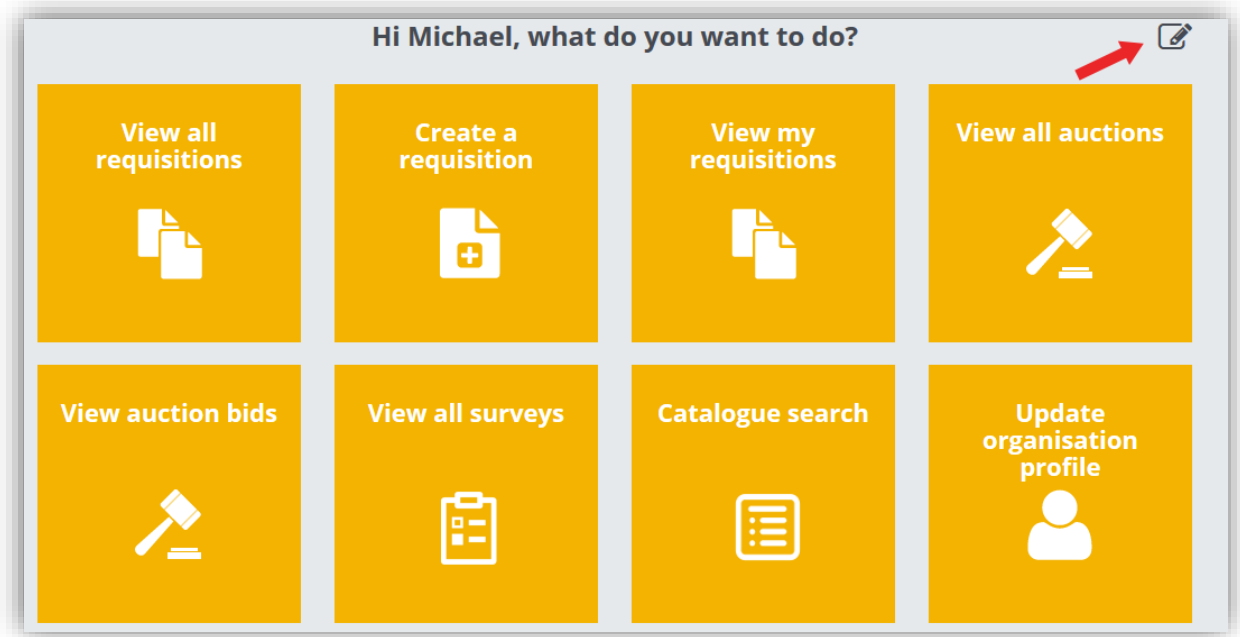
- Allows business users to generate Purchase Orders
- If the value of such Purchase Order is above the threshold assigned to the user, approvals from the head of department/procurement team are required
- Depending on the settings, Purchase Order can be sent to email, uploaded to the Secure FTP server,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

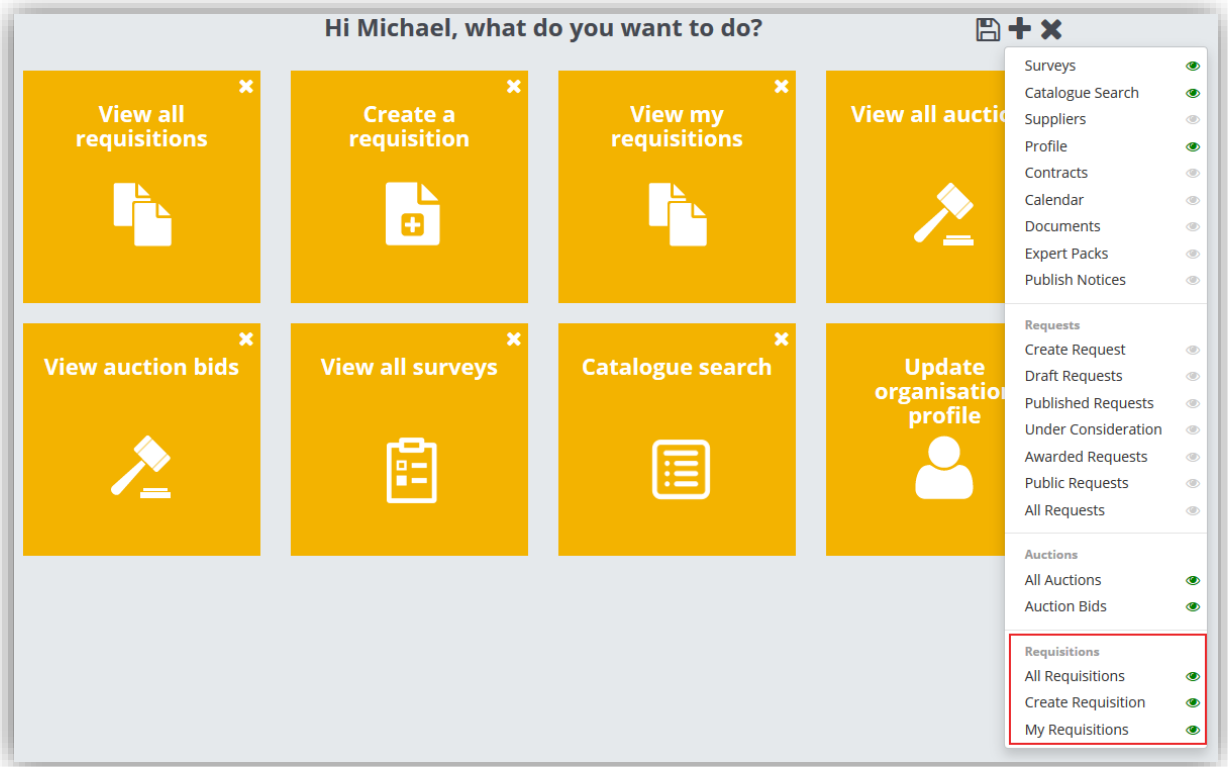
System navigation

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

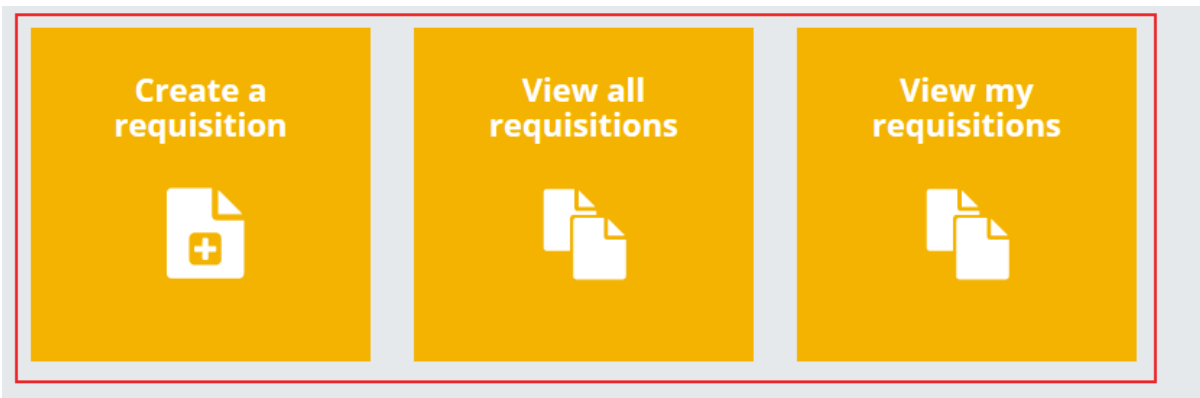


Users frequently using the requisitions module are advised to add the requisition tiles to their home screen. This can be done by selecting the “edit” icon above the tiles and clicking on the plus icon, selecting the options in the Requisitions menu.





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.

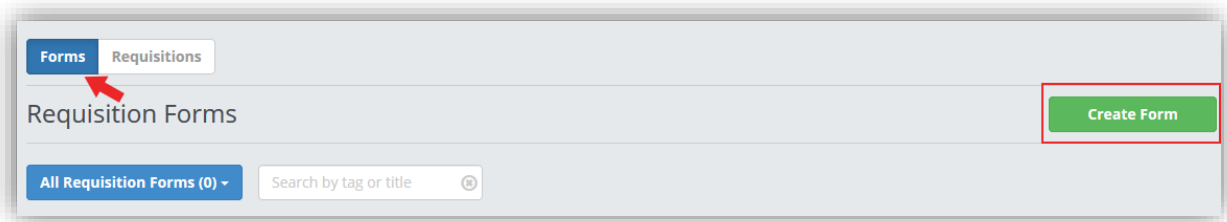
Supplier Requisitions

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

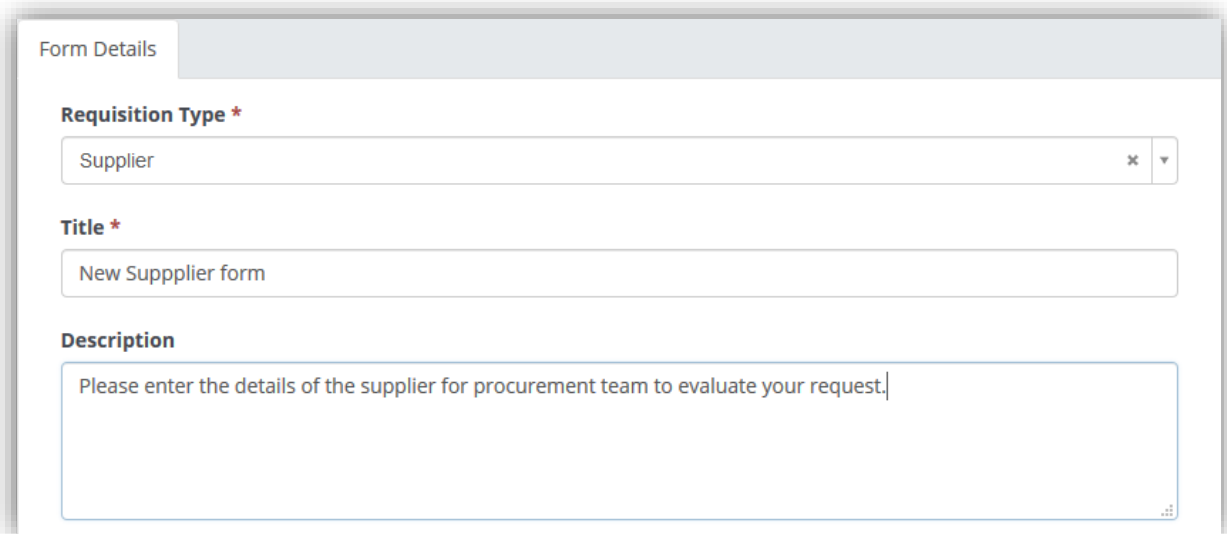
Creating Supplier Requisition form

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:



The screenshot shows the 'Form Details' screen. It has a tab labeled 'Form Details'. Below the tab, there are three main sections:

- Requisition Type ***: A dropdown menu with 'Supplier' selected.
- Title ***: A text input field containing 'New Supplier form'.
- Description**: A larger text area containing the text 'Please enter the details of the supplier for procurement team to evaluate your request.'.

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.

Select Supplier Onboard *

ID: 15995 - Supplier Requisition Process (Published)
✕ ▾




Select the Onboard request which you would like suppliers to be brought forward into if the requisition is approved.

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.

Requisitioner Access

Choose which users will have access to this Requisition Form in order to create requisitions. Access can be granted to all requisition users which includes Requisitioners, Requisition Admins and Requisition Approvers. Or you can choose a selection of particular users who have Requisitioner, Requisition Approver or Requisition Admin permissions in your Organisation.

All Requisition Users
 Choose Particular users

	NAME	TEAM ROLE	
	Alison Baker Procurement Manager	Requisitioner	✕
	Declan Folan Category Manager XYZ	Requisitioner	✕
	Chris Reed Quality Assurance	Requisitioner	✕



[Click to add another team member or group](#)

Choose the Users or User Groups that have access to submit requisitions based on this form.

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.


Approval / Oversight Team

Add Requisition Admins or Requisition Approvers to this form as approvers if they must approve all Requisitions created from this form. Add Requisition Admins, Requisition Approvers or Requisition Readers as readers to give them visibility of all requisitions created from this form.

NAME	TEAM ROLE	
 Michael Ferencz (Creator) Procurement Specialist	Approver	▼
 Caroline Parker Account Manager	Approver	▼ ×

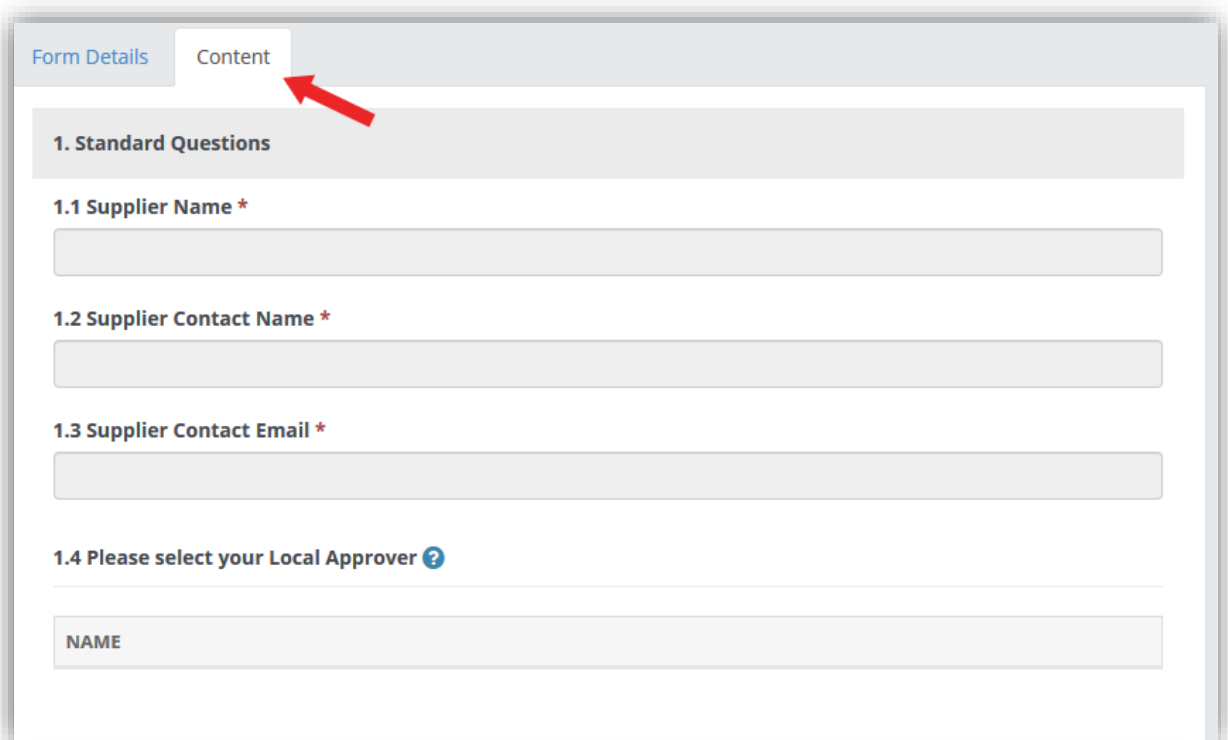
Click to add another team member or group

Please select Approval / Oversight Team members.

 **Local Approval ?**
 Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

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.



Form Details Content

1. Standard Questions

1.1 Supplier Name *

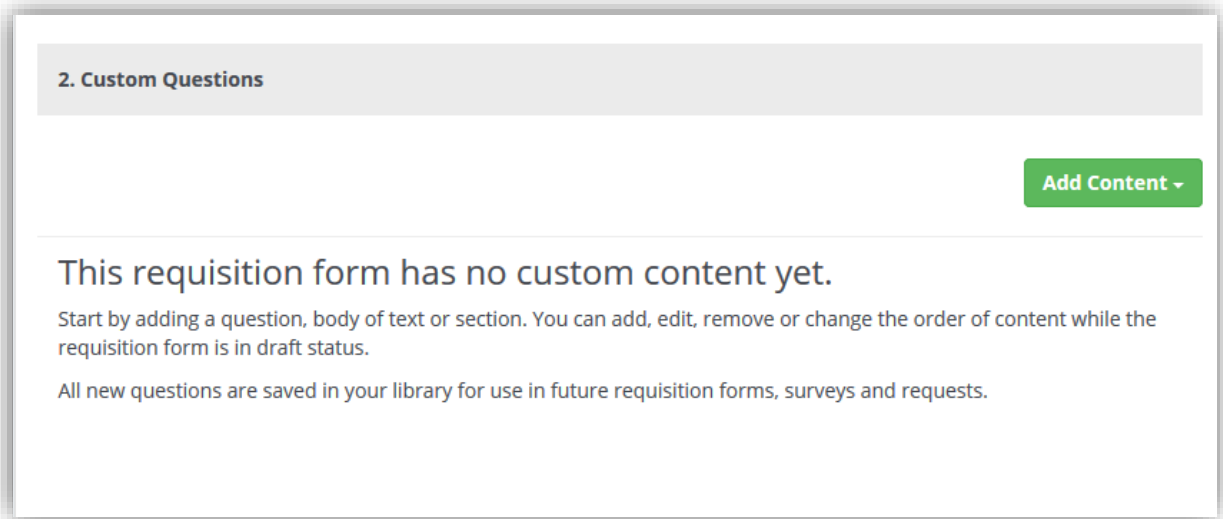
1.2 Supplier Contact Name *

1.3 Supplier Contact Email *

1.4 Please select your Local Approver ?

NAME

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



2. Custom Questions

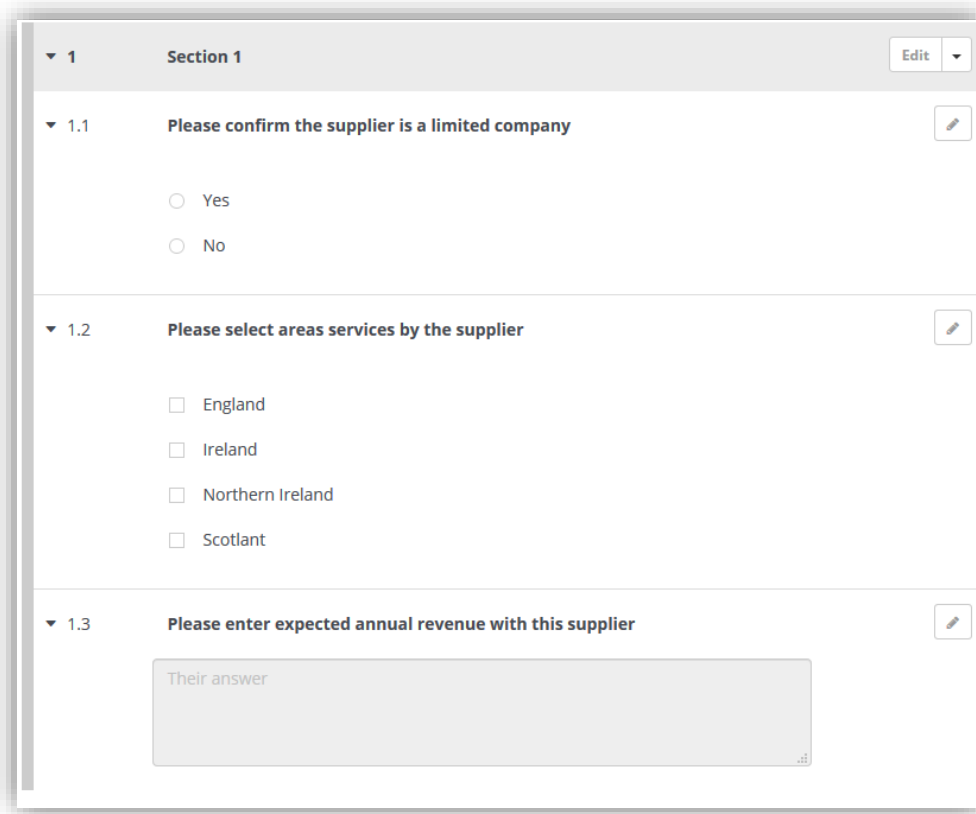
[Add Content ▾](#)

This requisition form has no custom content yet.

Start by adding a question, body of text or section. You can add, edit, remove or change the order of content while the requisition form is in draft status.

All new questions are saved in your library for use in future requisition forms, surveys and requests.

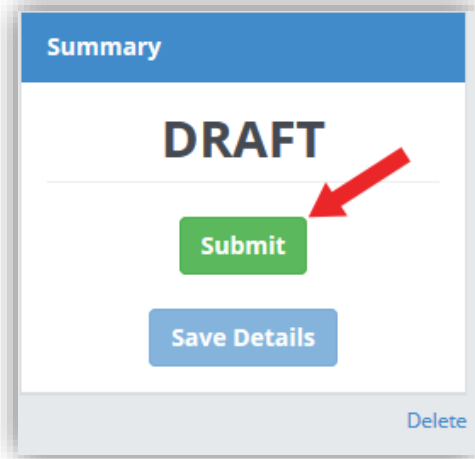
These questions are created in an identical way to the RFX module and information about this can be found [here](#) under “Creating Requests” heading. A simple example of the custom questions is shown below. These questions can be customised to your own requirements and can be different in each form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



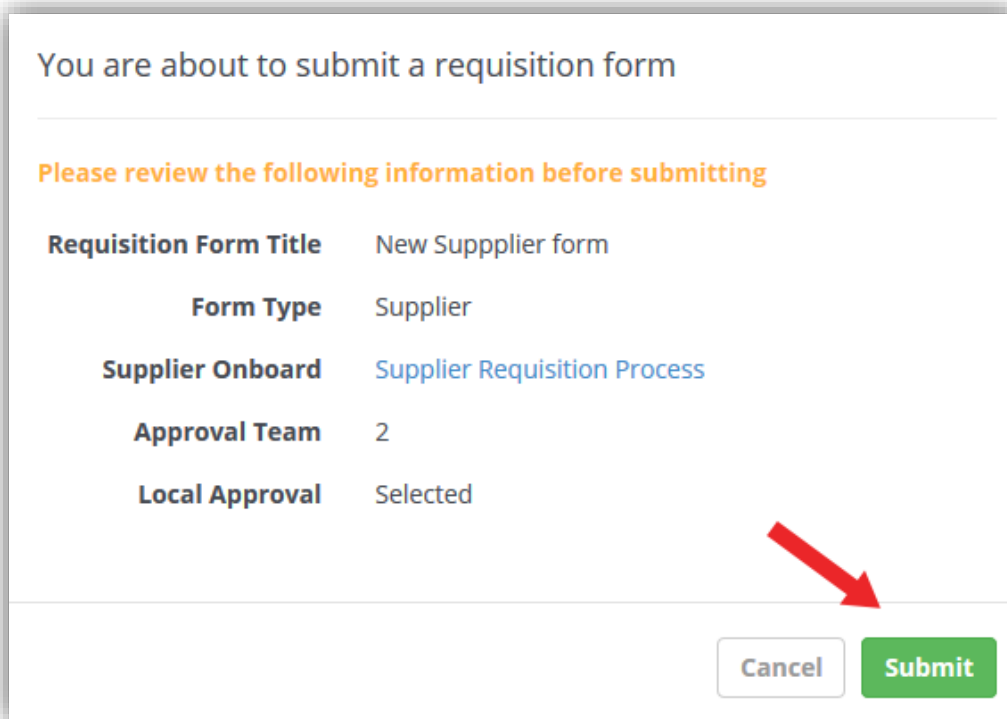
The screenshot displays a form titled "Section 1" with an "Edit" button in the top right corner. It contains three numbered questions:

- 1.1** Please confirm the supplier is a limited company. This question has two radio button options: "Yes" and "No".
- 1.2** Please select areas services by the supplier. This question has four checkbox options: "England", "Ireland", "Northern Ireland", and "Scotlant".
- 1.3** Please enter expected annual revenue with this supplier. This question has a text input field with the placeholder text "Their answer".

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

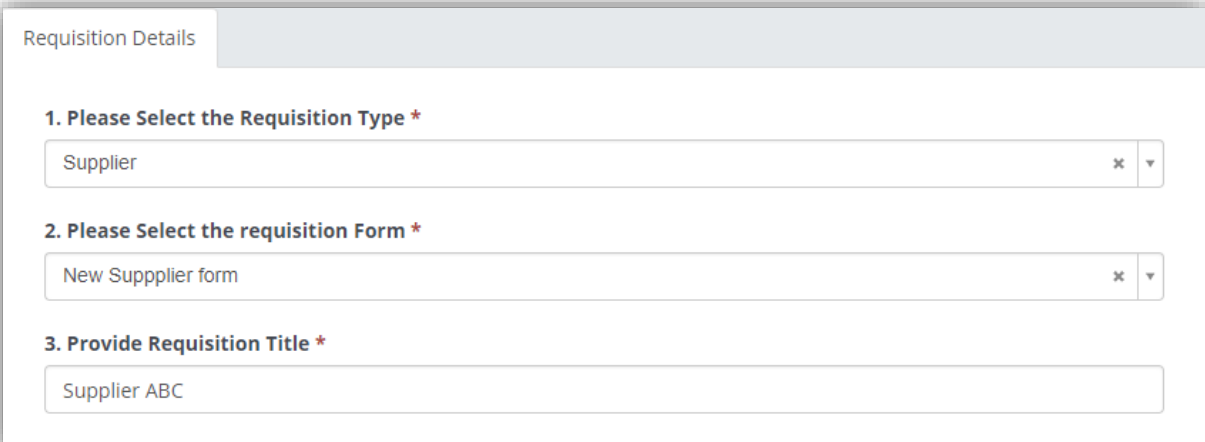


This will display a pop-up window with an overview of the form. To confirm, click on the “Submit” button again. If any mistakes are found, “Cancel” can be selected, which will allow further editing of the form.



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.

A green rectangular button with the text "Create Requisition" in white.A screenshot of a web form titled "Requisition Details". It contains three sections: 1. "Please Select the Requisition Type *" with a dropdown menu showing "Supplier". 2. "Please Select the requisition Form *" with a dropdown menu showing "New Supplier form". 3. "Provide Requisition Title *" with a text input field containing "Supplier ABC".

Requisition Details

1. Please Select the Requisition Type *

Supplier

2. Please Select the requisition Form *

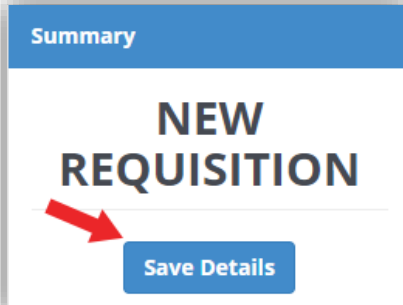
New Supplier form

3. Provide Requisition Title *

Supplier ABC

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.

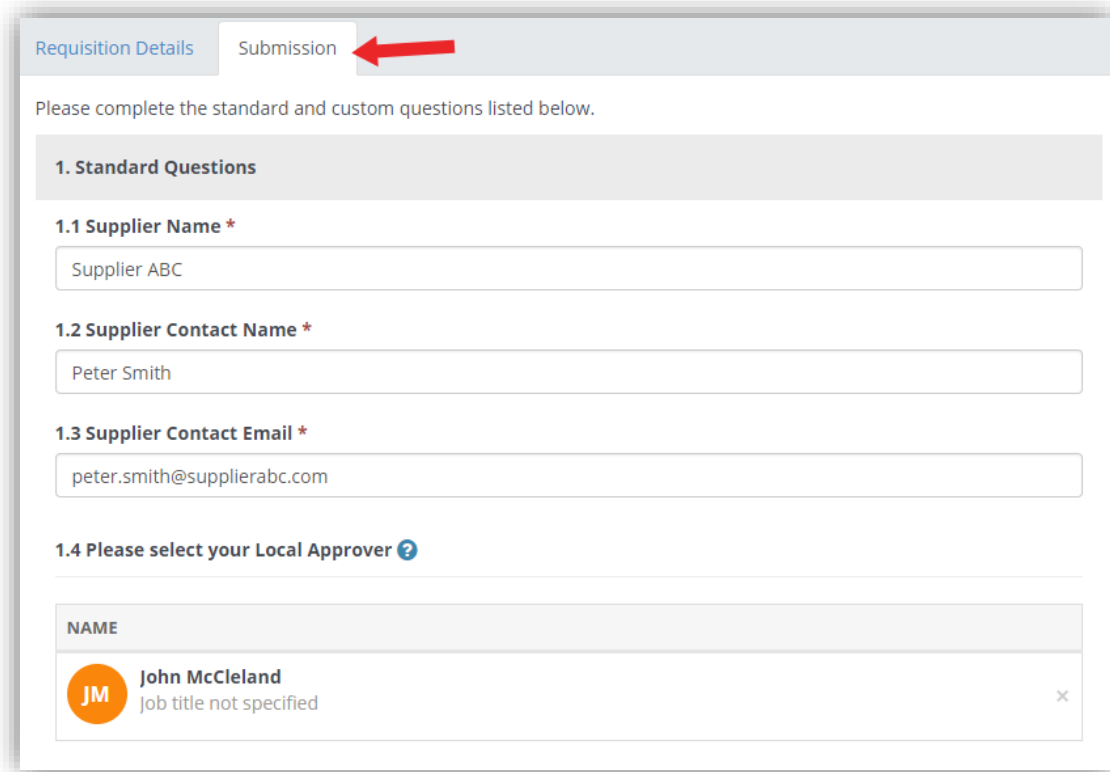
A screenshot of a summary screen. At the top is a blue header with the word "Summary". Below it, the text "NEW REQUISITION" is displayed in large, bold, black letters. A red arrow points to a blue button labeled "Save Details" at the bottom of the screen.

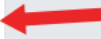
Summary

**NEW
REQUISITION**

Save Details

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



Requisition Details Submission 

Please complete the standard and custom questions listed below.



1. Standard Questions

1.1 Supplier Name *

1.2 Supplier Contact Name *

1.3 Supplier Contact Email *

1.4 Please select your Local Approver ?

NAME	
 John McClelland job title not specified	

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.

2. Custom Questions

Overview
Expand all
Collapse all

▼ 1 **Section 1**

▼ 1.1 **Please confirm the supplier is a limited company** ✔

Yes
 No

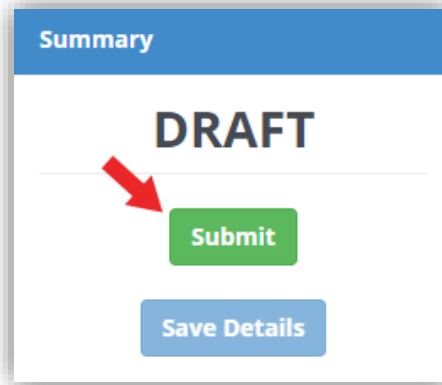
▼ 1.2 **Please select areas services by the supplier** ✔

England
 Ireland
 Northern Ireland
 Scotlant

▼ 1.3 **Please enter expected annual revenue with this supplier** ✔

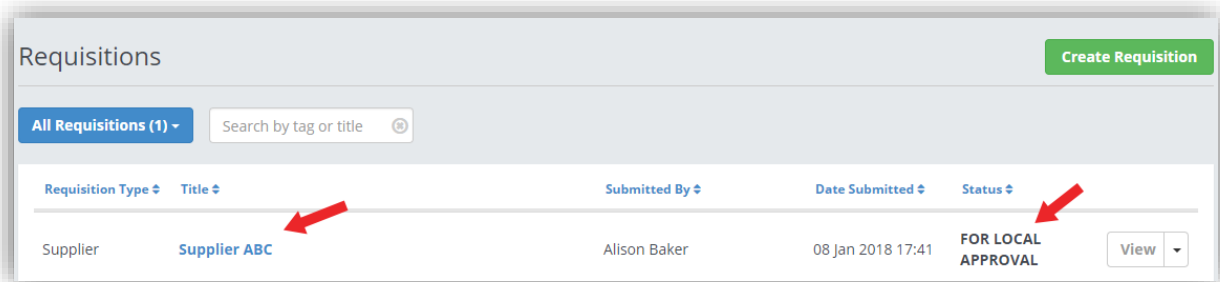
€500k

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

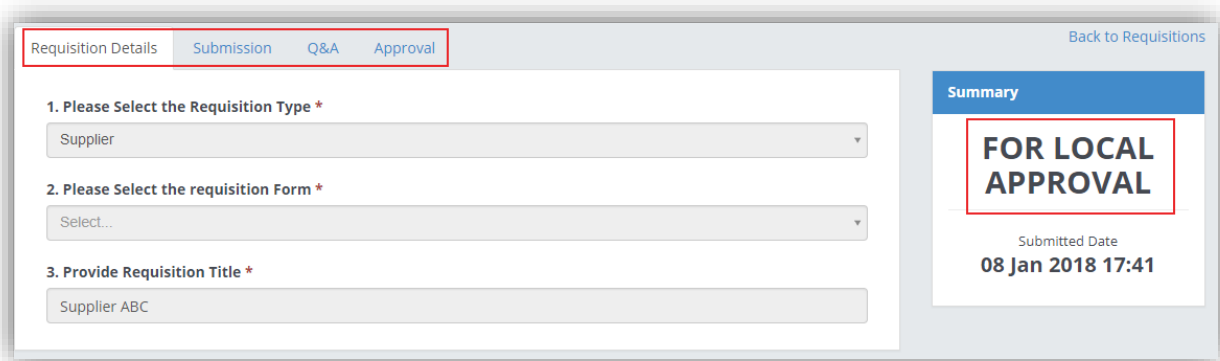


Local Approval

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.

Requisition Approval Decision

Approve or Reject this Requisition

Supplier Details		Requisitioner Details	
Name:	Supplier ABC	Submitted by:	Alison Baker
Contact:	Peter Smith		
Email:	peter.smith@supplierabc.com		

APPROVER NAME	APPROVER TYPE	DATE APPROVED	DECISION
John McClelland	Local Approver	--	<div style="display: flex; gap: 5px;"> Approve Reject </div>
Michael Ferencz	Head Approver	--	Pending Local
Caroline Parker	Head Approver	--	Pending Local

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.

You are about to Reject this Requisition

This Requisition will be marked as rejected. The Requisitioner will be notified of your decision and any comment you enter below.

Enter your reason for rejecting this requisition and/or recommended changes

Cancel
Reject

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.

You are about to Approve this Requisition

Please note the following:

- By clicking "Approve" you are sending this requisition for approval to the head approval team.


Do you wish to Continue?

Comment (Optional)

Requisition is approved.

Attach documents

Attach any supporting documents

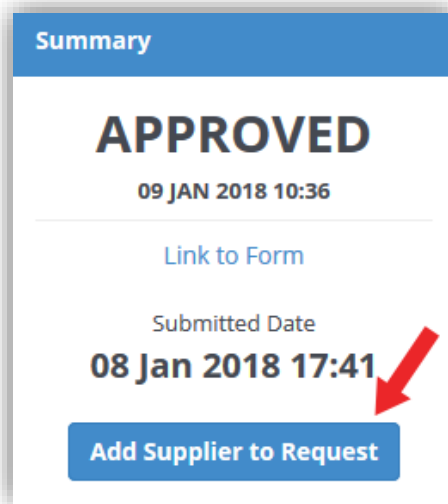
 placeholder document.txt 0 KB ×

By Approving this Requisition you confirm that you have attached a Conflict Of Interest Document or other required documents.

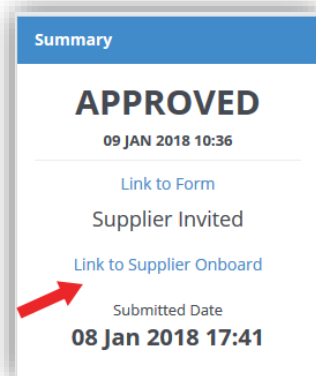
Head Approval

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.

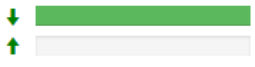
Once all the Head Approvers enter their approval of the Requisition, a new button “Add Supplier to Request” is added to the Requisition. Clicking on this button will add the details entered by the business user to the pre-selected Supplier On-board questionnaire and automatically invite the supplier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

peter.smith@supplierabc.com Not registered yet <i>This contact was prompted to register for a free supplier account and respond to your request</i>	Invited 09 Jan 2018 18:44 Progress 
--	---

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 12 KB
SAMPLE DOCUMENT.docx

[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

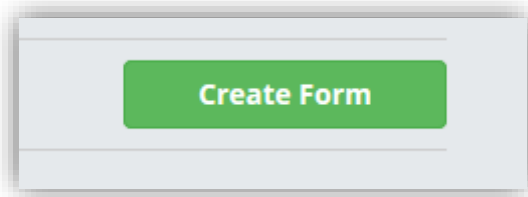
Requisition Type ▾	Title ▾	Submitted By ▾	Date Submitted ▾	Status ▾	
Supplier	Supplier ABC	Alison Baker	08 Jan 2018 17:41	APPROVED	View ▾

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).

Admin Edit

Select the Expert Pack where you want to save the draft request "Electrical components - Request for Pricing template" as a template request:

Product Requisitioning (1) ▼

Lock the template content ?

Lock content tab changes on this requests. Users will not be able to edit any of the questions and items in the content tab of this template.

Make template available for requisitions ?

Allow this template to be used as part of the product requisitioning process.

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

Form Details

Requisition Type *

Product/Service x ▼

Title *

Electrical Components Requisition form

Description

Please use this form for your requisitions for any electrical components required for your projects

Select Request Template *

ID: 16560 - Electrical components - Request for Pricing template (Template) x ▼

Select the request template which you would like to create a request from in order to procure the product/service.

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.

All Requisition Users
 Choose Particular users

NAME	TEAM ROLE	
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">CP</div> <div> <p>Caroline Parker Account Manager</p> </div> </div>	Requisitioner	x
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">JL</div> <div> <p>John Lennon Sub-Contractor</p> </div> </div>	Requisitioner	x
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">JM</div> <div> <p>John McClelland Job title not specified</p> </div> </div>	Requisitioner	x

Click to add another team member or group

Choose the Users or User Groups that have access to submit requisitions based on this form.

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

Approval / Oversight Team

Add Requisition Admins or Requisition Approvers to this form as approvers if they must approve all Requisitions created from this form. Add Requisition Admins, Requisition Approvers or Requisition Readers as readers to give them visibility of all requisitions created from this form.

NAME	TEAM ROLE
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">MF</div> <div> <p>Michael Ferencz</p> <p>Procurement Specialist</p> </div> <div style="margin-left: 20px; color: green; font-weight: bold; border: 1px solid green; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">1</div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Approver</div> <div style="text-align: right; color: gray;">x</div>
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">CP</div> <div> <p>Caroline Parker</p> <p>Account Manager</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Approver</div> <div style="text-align: right; color: gray;">x</div>

Click to add another team member or group

Please select Approval / Oversight Team members.

Above Threshold Approval

Choose user(s) to give a final level of approval to Requisitions that are above a certain threshold value. These users will be added at the end of the approval process to sign off once the regular approvers have finished. This setting is optional.

NAME	THRESHOLD - EUR (€)
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">RS</div> <div> <p>Ringo Starr</p> <p>Procurement Helpdesk - Construction</p> </div> <div style="margin-left: 20px; color: green; font-weight: bold; border: 1px solid green; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">2</div> </div>	<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px;">EUR (€)</div> <div style="border: 1px solid #ccc; padding: 2px; margin-left: 5px; width: 100px;">20000</div> <div style="margin-left: 10px; color: gray;">x</div> </div>

✓

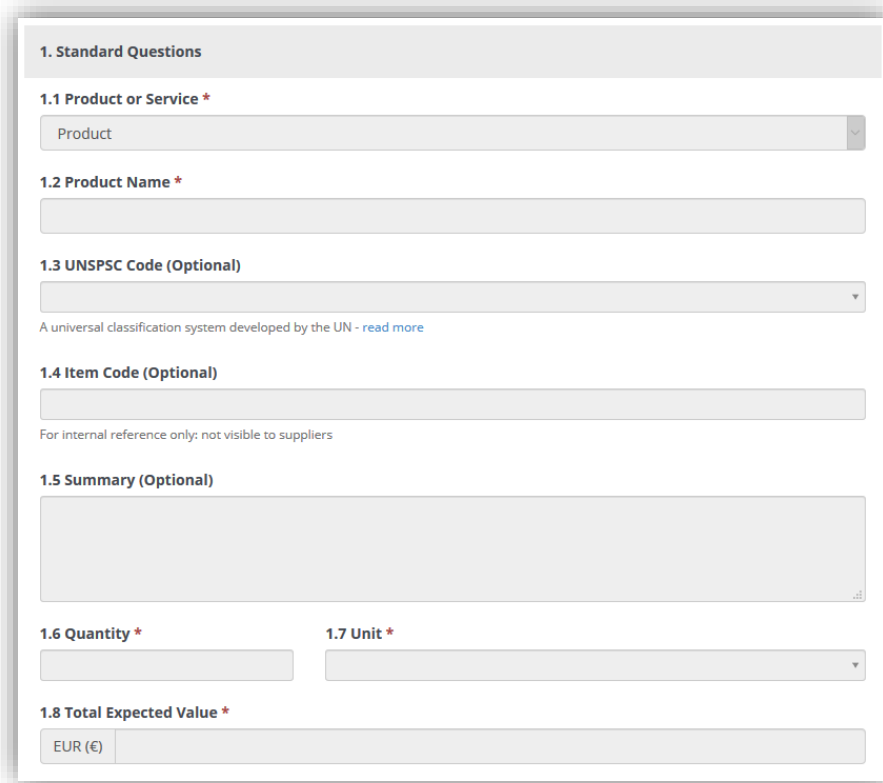
Local Approval ? 3

Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

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:



1. Standard Questions

1.1 Product or Service *

1.2 Product Name *

1.3 UNSPSC Code (Optional)

A universal classification system developed by the UN - [read more](#)

1.4 Item Code (Optional)

For internal reference only; not visible to suppliers

1.5 Summary (Optional)

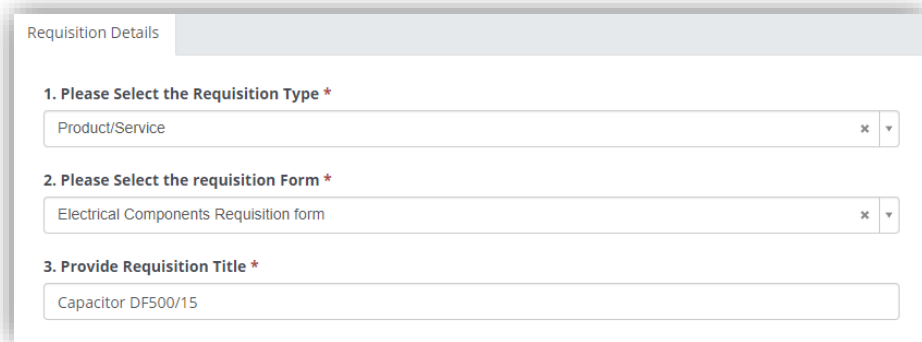
1.6 Quantity * **1.7 Unit ***

1.8 Total Expected Value *

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.



Requisition Details

1. Please Select the Requisition Type *

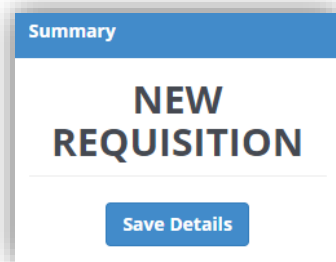
Product/Service x ▾

2. Please Select the requisition Form *

Electrical Components Requisition form x ▾

3. Provide Requisition Title *

Capacitor DF500/15



Summary

**NEW
REQUISITION**

Save Details

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.

1. Standard Questions

1.1 Product or Service *

1.2 Product Name *

1.3 UNSPSC Code (Optional)

A universal classification system developed by the UN - [read more](#)

1.4 Item Code (Optional)

For internal reference only; not visible to suppliers


1.5 Summary (Optional)

1.6 Quantity * **1.7 Unit ***

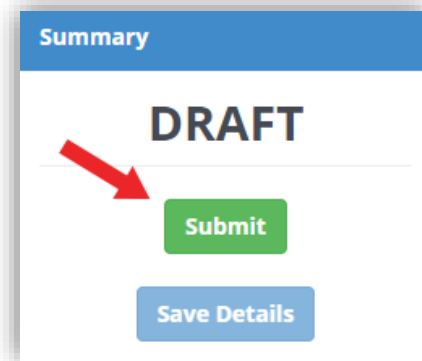
1.8 Total Expected Value *

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

1.4 Please select your Local Approver ?

NAME	
	Caroline Parker Account Manager

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.

Requisition Details Submission Q&A **Approval**

Requisition Approval Decision
Approve or Reject this Requisition

Product Details		Requisitioner Details	
Product Name:	Capacitor DF500/15	Submitted by:	John McClelland
Quantity:	1500		
Unit:	Each		
Total Expected Value:	€ 31500		

APPROVER NAME	APPROVER TYPE	DATE APPROVED	DECISION
Caroline Parker	Local Approver	11 Jan 2018 13:17	Approved
Michael Ferencz	Head Approver	11 Jan 2018 13:20	Approved
Caroline Parker	Head Approver	11 Jan 2018 13:17	Approved
Ringo Starr	Above Threshold Approver	--	<div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #f0f0f0;">Approve</div> <div style="display: inline-block; border: 1px solid #ccc; padding: 2px 5px; background-color: #f0f0f0; margin-left: 10px;">Reject</div>

You are about to Approve this Requisition

Please note the following:

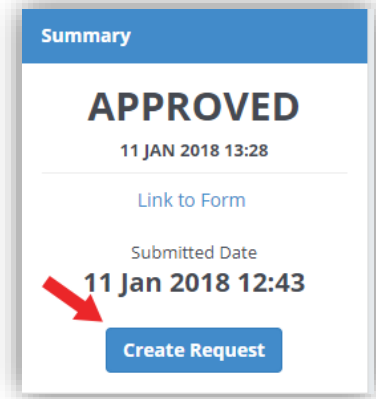
- By approving this requisition, you are creating a request for this product/service using the following template - "Electrical components - Request for Pricing template".
- The person who created this requisition will be notified that their requisition has been approved.

Do you wish to Continue?

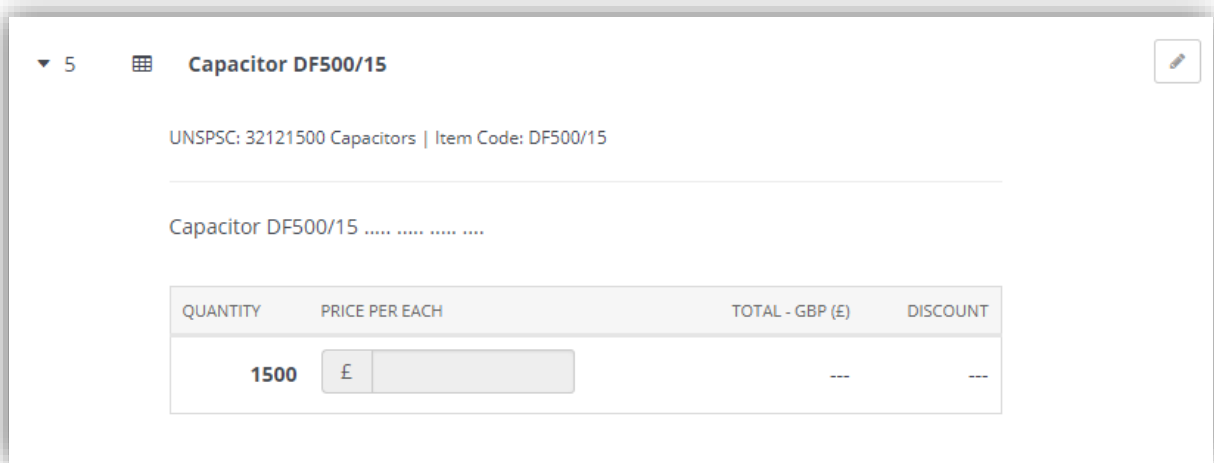
Cancel

Approve

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.



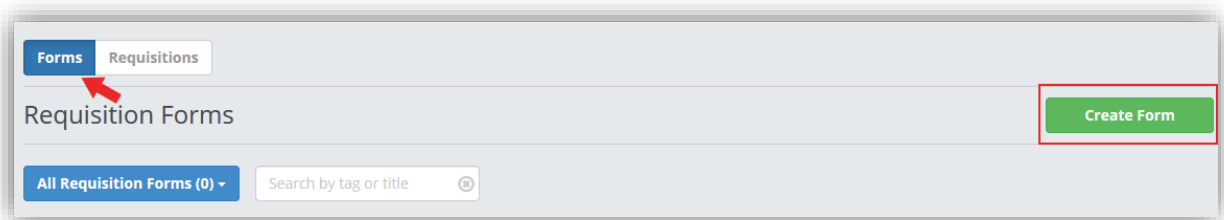
Purchase order

Creating Purchase Order form

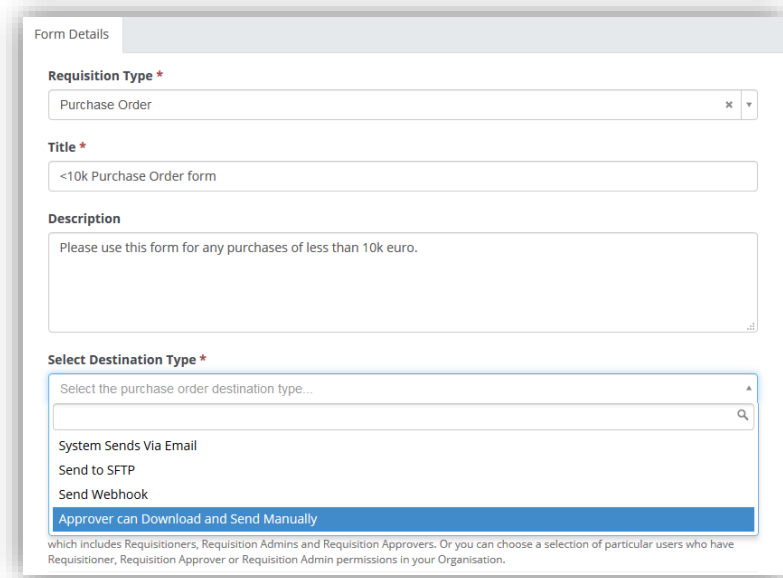
Like with the Supplier and Product/Service requisitions, the Purchase order workflow starts with the procurement team who creates PO Requisition form, selecting one of the several options how the PO will be generated and sent to the supplier. The options that can be selected are:

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.

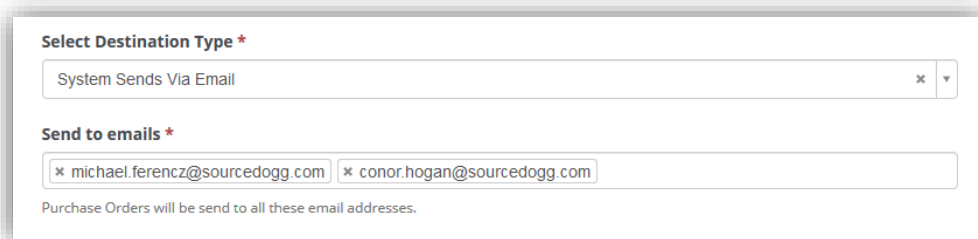


From the next screen, select the “Purchase Order” option and enter the Title and Description for your form. In the “Select Destination Type” select one of the options described above. This determines how the PO document will be generated and who will receive it.

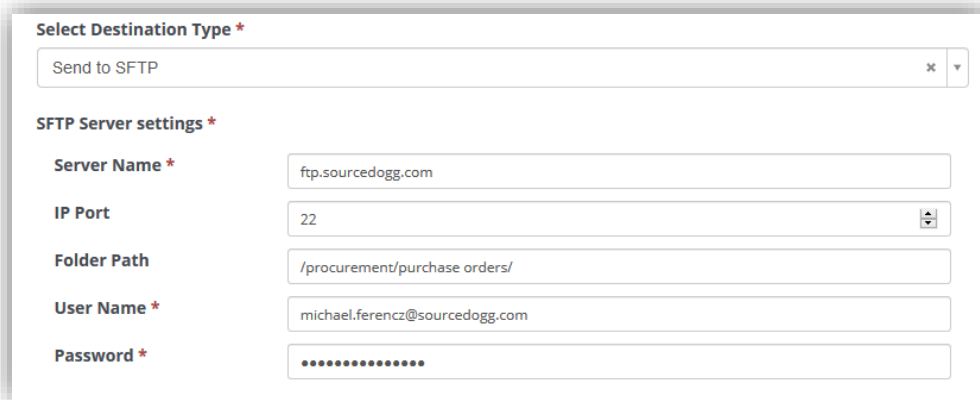


All 4 options will be described below:

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.



Select Destination Type *

Send to SFTP

SFTP Server settings *

Server Name * ftp.sourcedogg.com

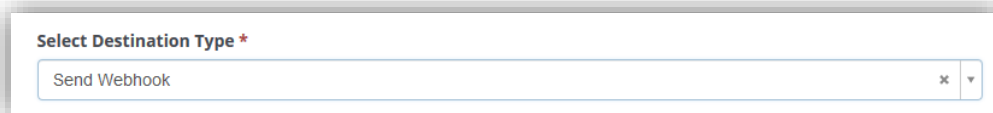
IP Port 22

Folder Path /procurement/purchase orders/

User Name * michael.ferencz@sourcedogg.com

Password *

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



Select Destination Type *

Send Webhook

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.

Currency

Euro EUR (€) ▼

Requisitioner Access

Choose which users will have access to this Requisition Form in order to create requisitions. Access can be granted to all requisition users which includes Requisitioners, Requisition Admins and Requisition Approvers. Or you can choose a selection of particular users who have Requisitioner, Requisition Approver or Requisition Admin permissions in your Organisation.

All Requisition Users
 Choose Particular users

NAME	TEAM ROLE	
AB Alison Baker Procurement Manager	Requisitioner	✕
CR Chris Reed Quality Assurance	Requisitioner	✕
DM David Moran Director of near galaxies	Requisitioner	✕

Click to add another team member or group

Choose the Users or User Groups that have access to submit requisitions based on this form.

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.

Approval / Oversight Team

Add Requisition Admins or Requisition Approvers to this form as approvers if they must approve all Requisitions created from this form. Add Requisition Admins, Requisition Approvers or Requisition Readers as readers to give them visibility of all requisitions created from this form.

NAME	TEAM ROLE
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">MF</div> <div> <p>Michael Ferencz 1</p> <p>Procurement Specialist</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Approver</div>
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">CP</div> <div> <p>Caroline Parker</p> <p>Account Manager</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Approver</div>

Click to add another team member or group

Please select Approval / Oversight Team members.

Above Threshold Approval

Choose user(s) to give a final level of approval to Requisitions that are above a certain threshold value. These users will be added at the end of the approval process to sign off once the regular approvers have finished. This setting is optional.

NAME	THRESHOLD - EUR (€)
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">JL</div> <div> <p>John Lennon 2</p> <p>Sub-Contractor</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;"> EUR (€) <input style="width: 100px;" type="text" value="20000"/> </div>

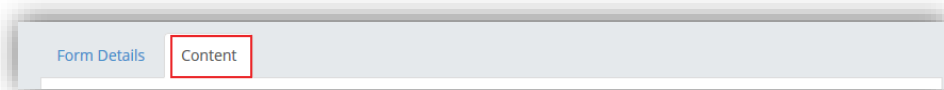
✓

Local Approval 3

Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

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.

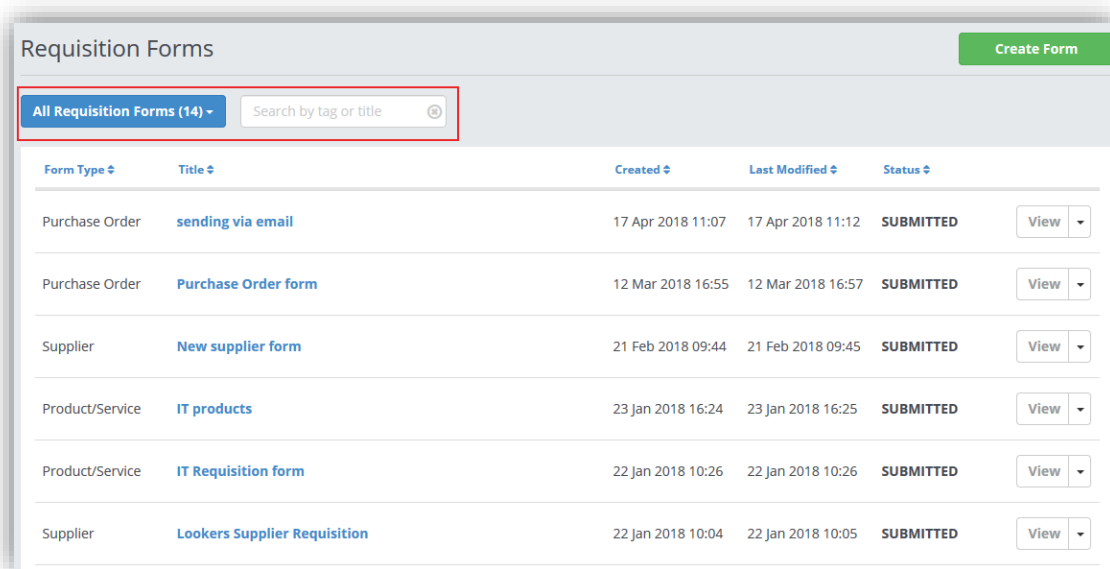
Once all information is selected, click on the Save Details button that will add a Content Tab to the Form. Here you can customise the questions that a Requisition user creating a PO must answer before submitting their request.



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.



Form Type	Title	Created	Last Modified	Status	View
Purchase Order	sending via email	17 Apr 2018 11:07	17 Apr 2018 11:12	SUBMITTED	View
Purchase Order	Purchase Order form	12 Mar 2018 16:55	12 Mar 2018 16:57	SUBMITTED	View
Supplier	New supplier form	21 Feb 2018 09:44	21 Feb 2018 09:45	SUBMITTED	View
Product/Service	IT products	23 Jan 2018 16:24	23 Jan 2018 16:25	SUBMITTED	View
Product/Service	IT Requisition form	22 Jan 2018 10:26	22 Jan 2018 10:26	SUBMITTED	View
Supplier	Lookers Supplier Requisition	22 Jan 2018 10:04	22 Jan 2018 10:05	SUBMITTED	View

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.

Requisition Details
[Back to Requisitions](#)

1. Please Select the Requisition Type *

2. Please Select the requisition Form *

3. Provide Requisition Title *

Summary

NEW REQUISITION

Save Details

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.

Please complete the standard and custom questions listed below.

1. Standard Questions

1.1 Supplier Name *

1.2 Supplier Contact Name *

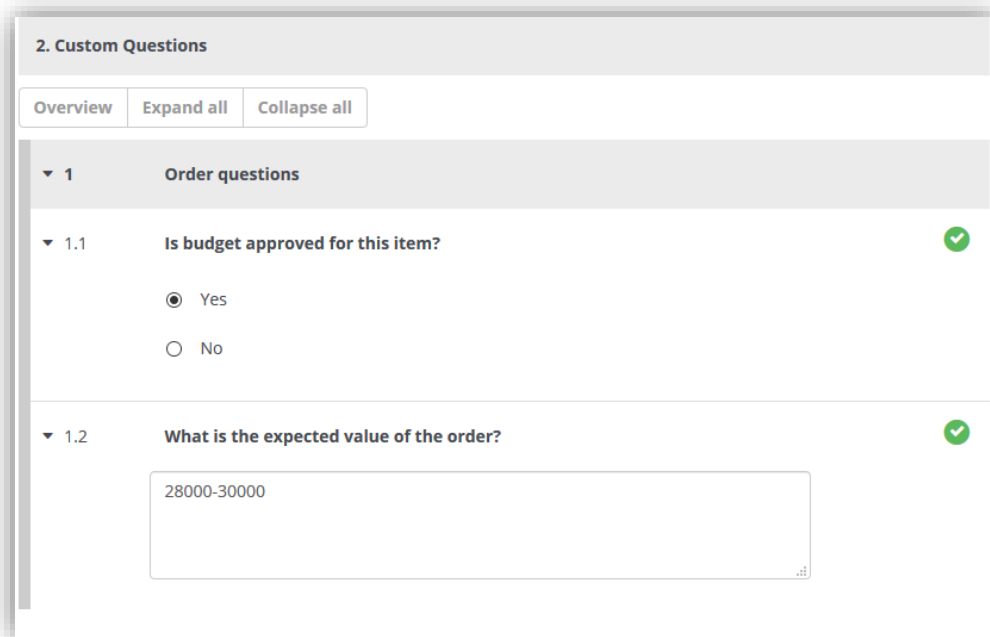
1.3 Supplier Contact Email *

1.4 Supplier Address *

1.5 Purchase Order Value *

EUR (€)	28000
---------	-------

1.6 Purchase Order Description



2. Custom Questions

Overview Expand all Collapse all

▼ 1 **Order questions**

▼ 1.1 **Is budget approved for this item?** ✓

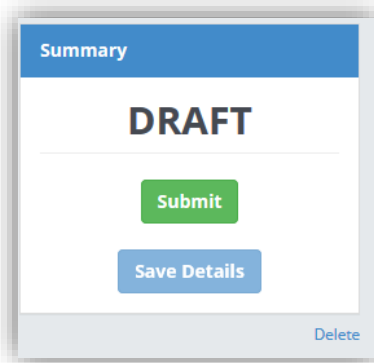
Yes

No

▼ 1.2 **What is the expected value of the order?** ✓

28000-30000

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



Summary

DRAFT

Submit

Save Details

Delete

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.

View Requisition: Purchase Order - PC Hardware for new office

Requisition Details Submission Q&A Approval Back to Requisitions

Requisition Approval Decision
Approve or Reject this Requisition

Purchase Order Details		Requisitioner Details	
Name:	Supplier XYZ	Submitted by:	Michael Ferencz
Contact:	Peter Smith		
Email:	p.smith@supplierxyz.com		
Address:	15 Downing Street London United Kingdom SW1A 2AA		
Order Value:	€ 28000		

Summary

FOR THRESHOLD APPROVAL

[Link to Form](#)

Submitted Date
17 Apr 2018 11:46

APPROVER NAME	APPROVER TYPE	DATE APPROVED	DECISION
John McClelland	Local Approver	17 Apr 2018 11:56	Approved
Michael Ferencz	Head Approver	17 Apr 2018 11:57	Approved
Caroline Parker	Head Approver	17 Apr 2018 11:59	Approved
John Lennon	Above Threshold Approver	--	Pending

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.

You are about to Approve this Requisition

Please note the following:

- This will mark the Requisition as approved and notify the Requisitioner.
- There will be a Purchase Order option available to all approvers once this Requisition has been approved.
- This Purchase Order will be transmitted by [System Sends Via Email] once it has been activated by a Requisition Approver

Do you wish to Continue?

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

You are about to create a Purchase Order

Please note the following:

- The Purchase Order will be automatically send to **Supplier XYZ**.
- You may preview the generated Purchase Order.
- A copy of the PO will be sent to your email address.

Purchase Order Template	<input type="text" value="Standard PO template - Under €15,000"/>	
Purchase Order Number	<input type="text" value="PO-2018-04-0044"/>	
Total Value	<input type="text" value="EUR (€)"/>	<input type="text" value="28000"/>
Supplier Name	<input type="text" value="Supplier XYZ"/>	
Supplier Contact Name	<input type="text" value="Peter Smith"/>	
Supplier Contact Email	<input type="text" value="p.smith@supplierxyz.com"/>	
Supplier Address	<input type="text" value="15 Downing Street
London
United Kingdom
SW1A 2AA"/>	

Preview the generated Purchase Order Form. [Preview PO](#)

[Cancel](#) [Submit](#)

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.


Summary

APPROVED

17 APR 2018 12:07

[Link to Form](#)

[Link to Purchase Order Document](#)

Submitted Date 

17 Apr 2018 11:46

Supplier		Ship To	
Peter Smith Supplier XYZ 15 Downing Street London United Kingdom SW1A 2AA		Michael Ferencz International Courier Service Galway Technology Park Mervue Galway Ireland H91 YW0F 00353857118468	
Quantity	Unit	Description	Total
1	N/A	PC Hardware for our new office in Manchester	€28000
TOTAL			€28000