

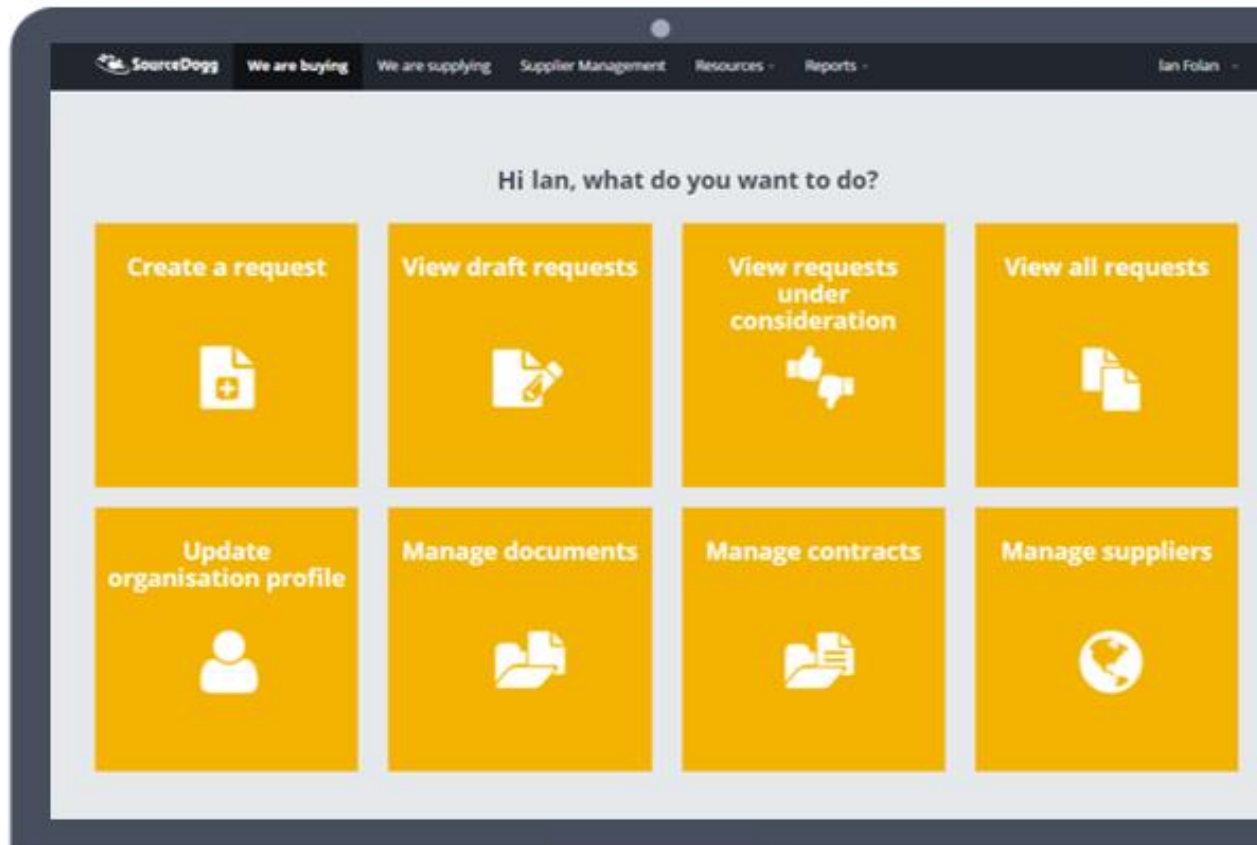


SourceDogg

Requisitioning Module

User Guide

Date: December 2020



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Introduction

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

All Requisitions

- Requisitioning forms can be customised with users granted access to different forms depending on their department / category of supplier, etc
- Requisitioners can communicate with the approval team through message board and are sent automatic updates as the requisition progresses through the system
- The Requisitioner has full visibility on the progress of their requisition, e.g. if it is approved, supplier is invited, supplier has responded, etc
- Custom Questions can be added for user to fill out if additional information is required for approval.

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

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

Purchase order Requisition

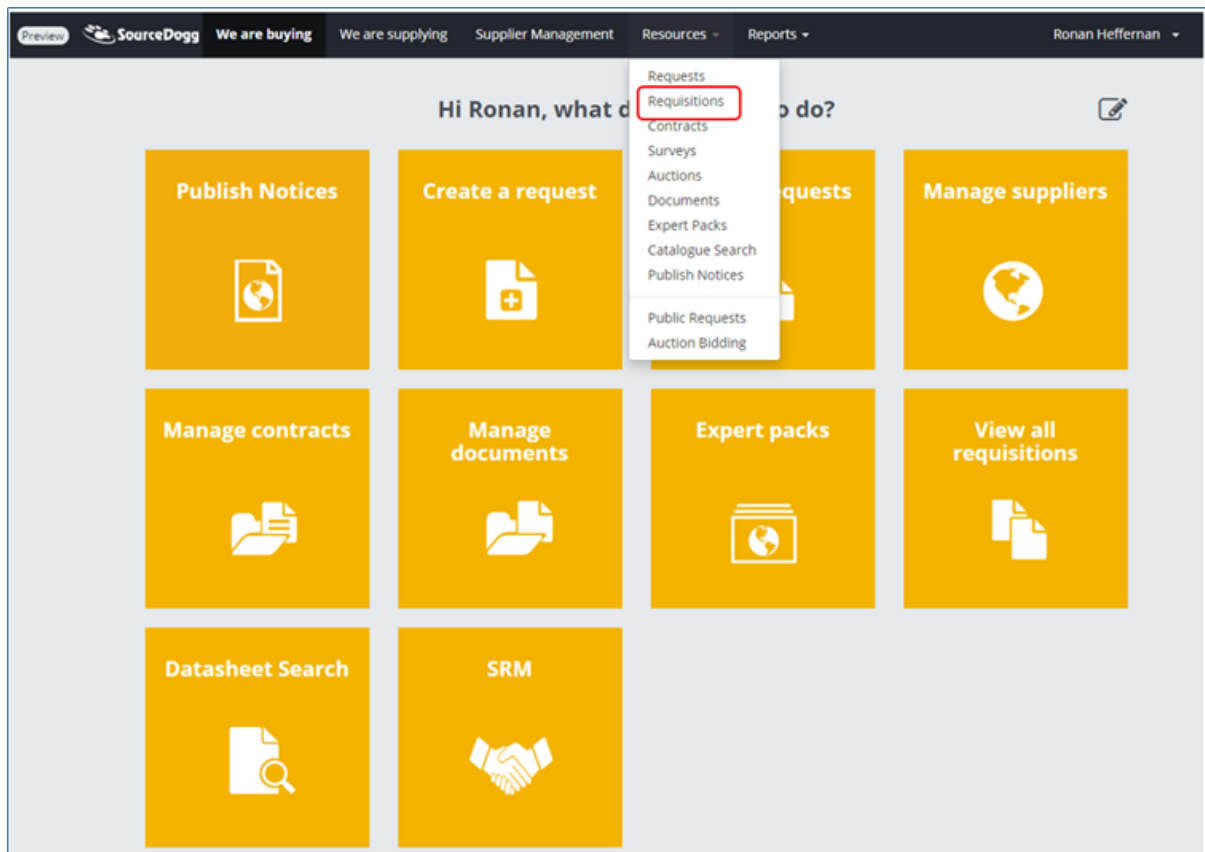
- Allows business users to generate Purchase Orders
- If the value of such Purchase Order is above the threshold assigned to the user, approvals from head of department / procurement team are required
- Depending on the settings, Purchase Order can be sent to email, uploaded to Secure FTP server, or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

Authorisation Requisition

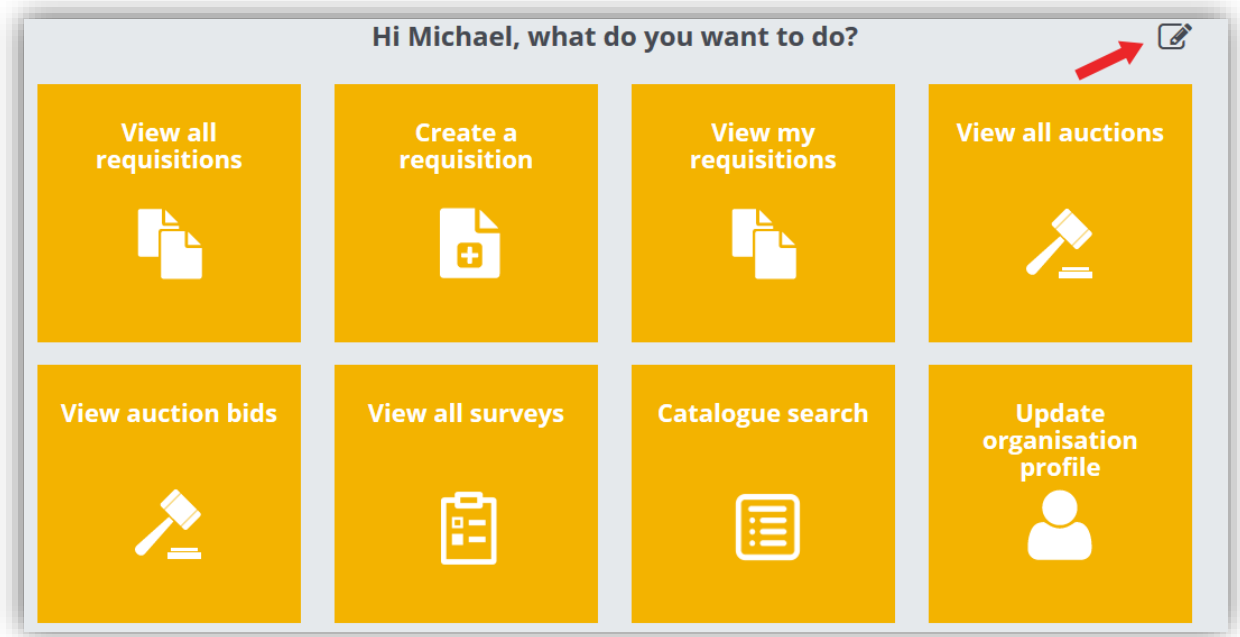
- This requisition type is intended for generic approval workflows covering any number of use cases such as approving a Business Case, a draft contract, a project plan or a procurement strategy.
- The purpose is recording the approval, having a version controlled record of what was approved, and the communications /comments relating to the approval.
- Unlike the Supplier, Product/Service, and Purchase Order requisition types, this does not link to a specific module in SourceDogg or trigger an output upon approval.
- Users that are filling out a Requisition for Authorisation must at a minimum submit a description of what needs to be approved and have the opportunity to attach supporting documents.

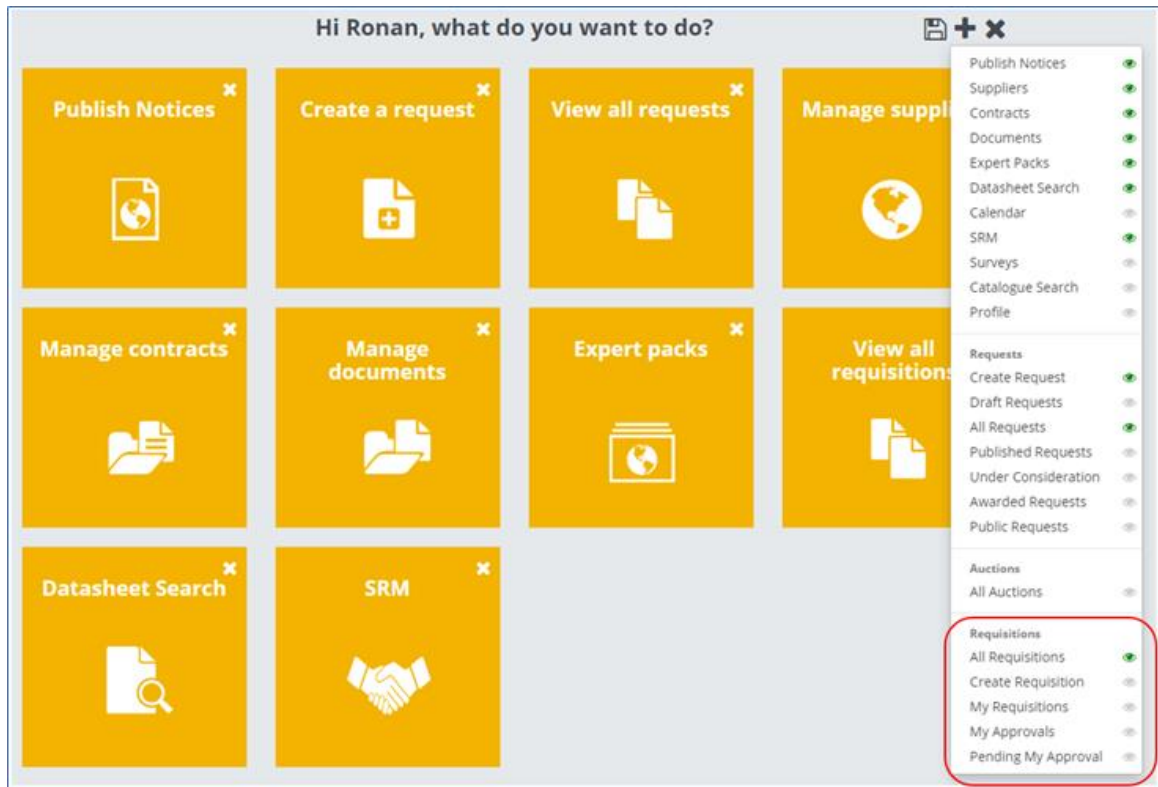
System navigation

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

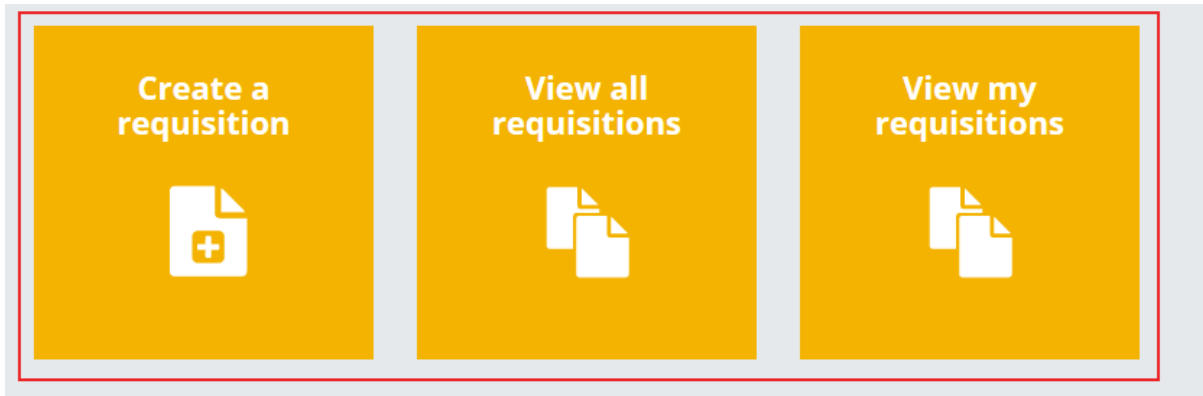


Users frequently using the requisitions module are advised to add the requisition tiles to their home screen. This can be done by selecting the “edit” icon above the tiles and clicking on the plus icon, selecting the options in the Requisitions menu.





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 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, 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.

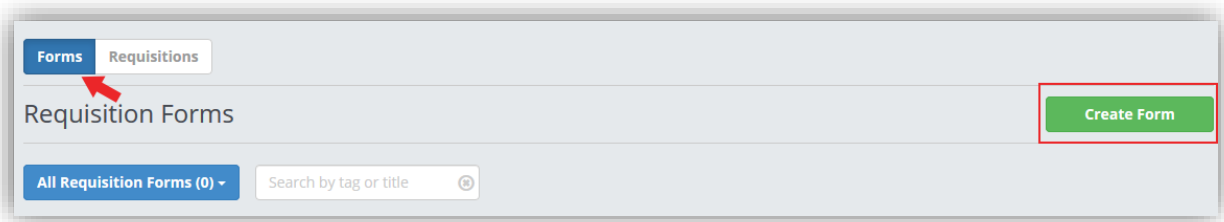
Supplier Requisitions

This functionality allows business users to request adding a new supplier to supply chain network by simply providing the information to procurement team through 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

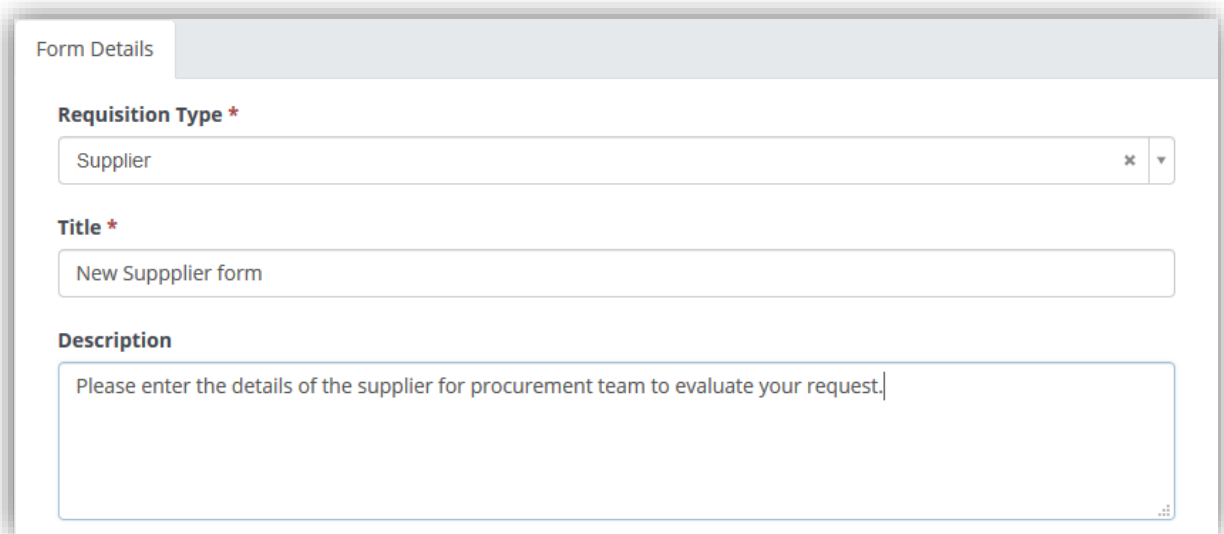
Creating Supplier Requisition form

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 be approved for use.

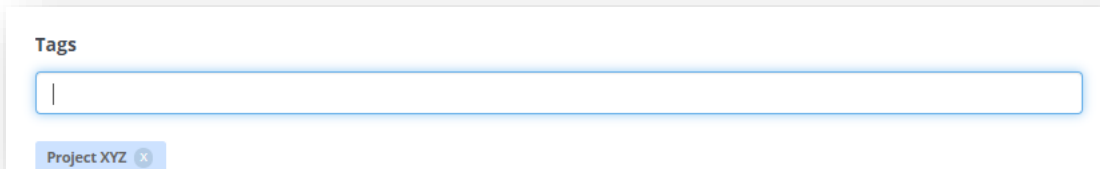
To create a new form, Requisition Admins click on the “Create Form” button in their main Requisitions screen.



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

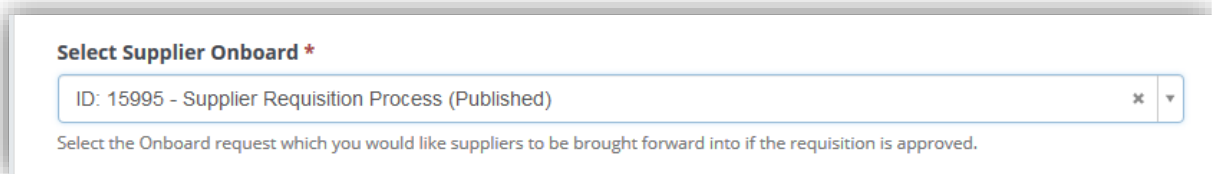


Tags can be added and used to search/filter requisitions and group them together based on related project, department, subject matter etc.



The screenshot shows a white rectangular box with a light blue border. At the top left, the word "Tags" is written in a bold, dark grey font. Below it is a long, empty text input field with a light blue border. At the bottom left of the box, there is a small blue pill-shaped tag with the text "Project XYZ" in white and a small white "x" icon to its right, indicating it can be removed.

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.






The screenshot shows a white rectangular box with a light blue border. At the top left, the text "Select Supplier Onboard *" is written in a bold, dark grey font. Below it is a dropdown menu with a light blue border. The selected item is "ID: 15995 - Supplier Requisition Process (Published)", followed by a small "x" icon and a downward-pointing triangle. Below the dropdown, there is a line of smaller text: "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.

Approval / Oversight Team

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. If the team member is a Reader they will only be able to view the form and cannot make changes to it.

1. Local Approval (Optional)

You can also set who will be required to approve the requisition. 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. They must be a Requisition Admin or Approver, if the team member is a Reader they will only be able to view the form and cannot make changes to it.

2. Head Approval - Level 1

This is a mandatory level where an approver or team of approvers are expected to each sign off on the requisition. The requisition is only approved if all agreed. If you choose to add a User Group to be an approver only one member needs to approve/reject on behalf of the group.


3. Additional Head Approval Levels (Optional)

There is an option to add multiple layers of approval if they are required from your organisation's processes. Up to 5 levels of Head Approvers can be added and multiple approvers can be added at each level. Each level is only notified of the requirement to approve when the previous level is complete. If an approver Rejects the requisition at any level, this ends the process and the requisition status changes to Rejected. Subsequent levels of approvers are not notified.

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.

Local Approval (Optional) 1
 Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

Head Approval - Level 1* 2



NAME	TEAM ROLE
 Billy Corgan Senior Procurement Specialist	Approver <input type="button" value="x"/>

Please select Approval Team members.

3 **Additional Head Approval Levels (Optional)**
 Set additional approval levels. Note that all individual approvers added to each level will be required to approve. If there are multiple levels, approvers will be invited in sequence according to level.

Requisition Readers who are not expected to Approve can be added via a separate “Oversight Team”. These users have access to view the requisition and will receive related notifications.

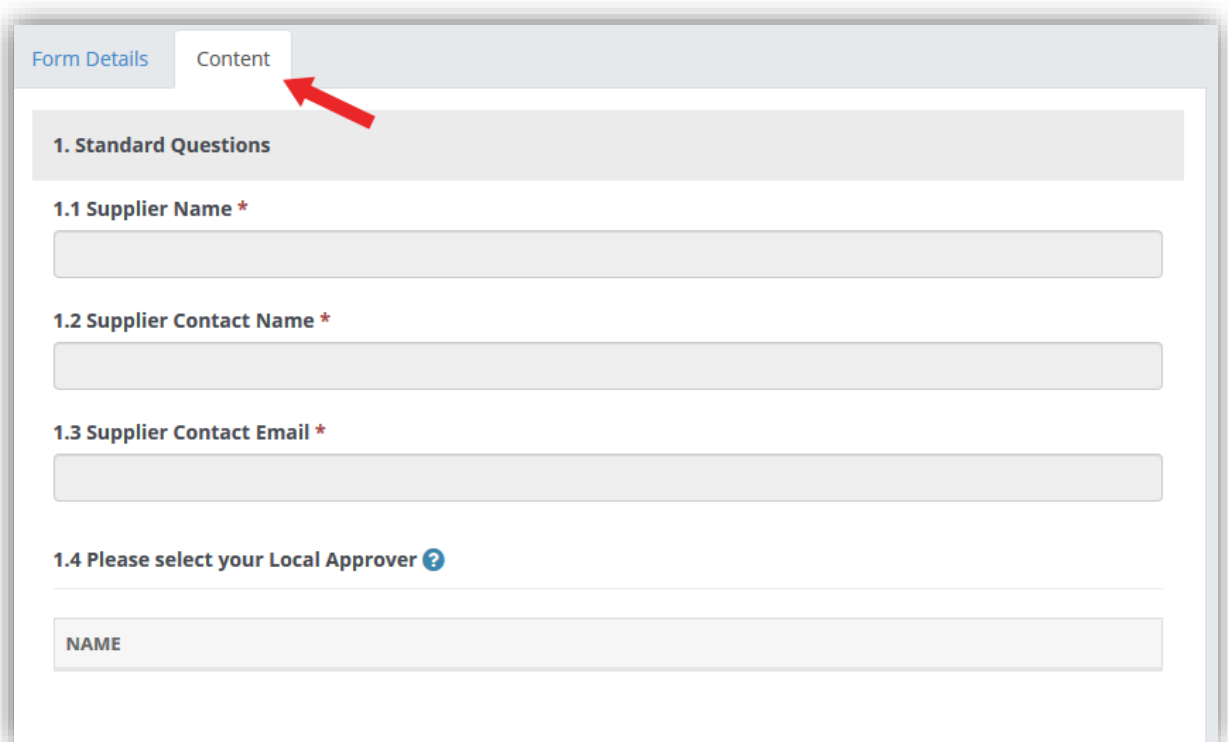
Oversight Team (Reader Only) (Optional)
 Add any additional users that need to monitor the requisitions from this form but do not have approval responsibilities.

NAME	TEAM ROLE
 Addison Chambers Operator	Reader <input type="button" value="x"/>
 Basil Dale Operator	Reader <input type="button" value="x"/>

Please select Oversight Team members.

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 invitation to SourceDogg.



Form Details Content

1. Standard Questions

1.1 Supplier Name *

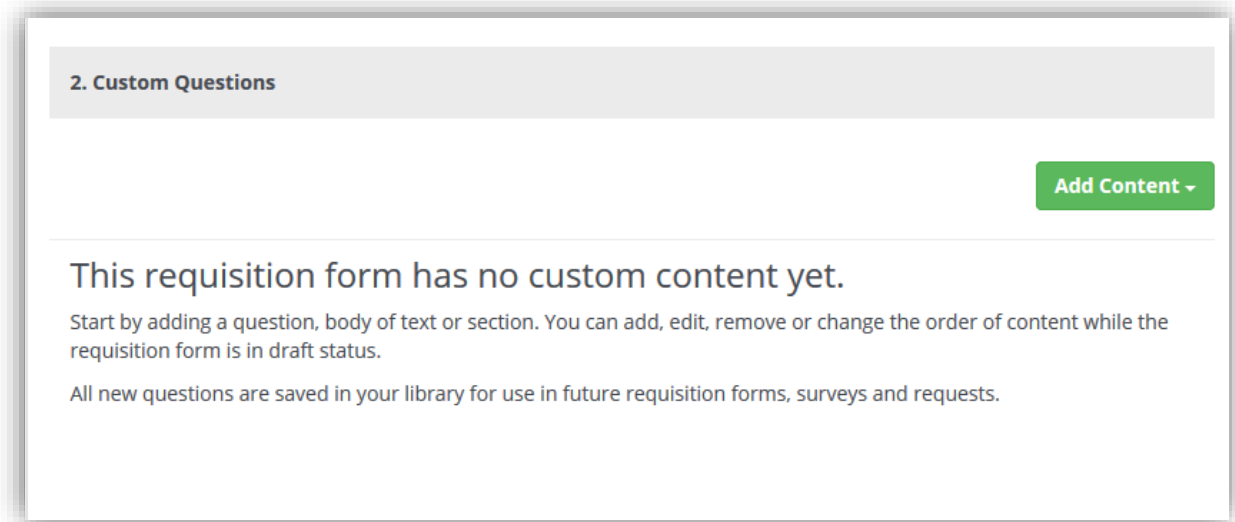
1.2 Supplier Contact Name *

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

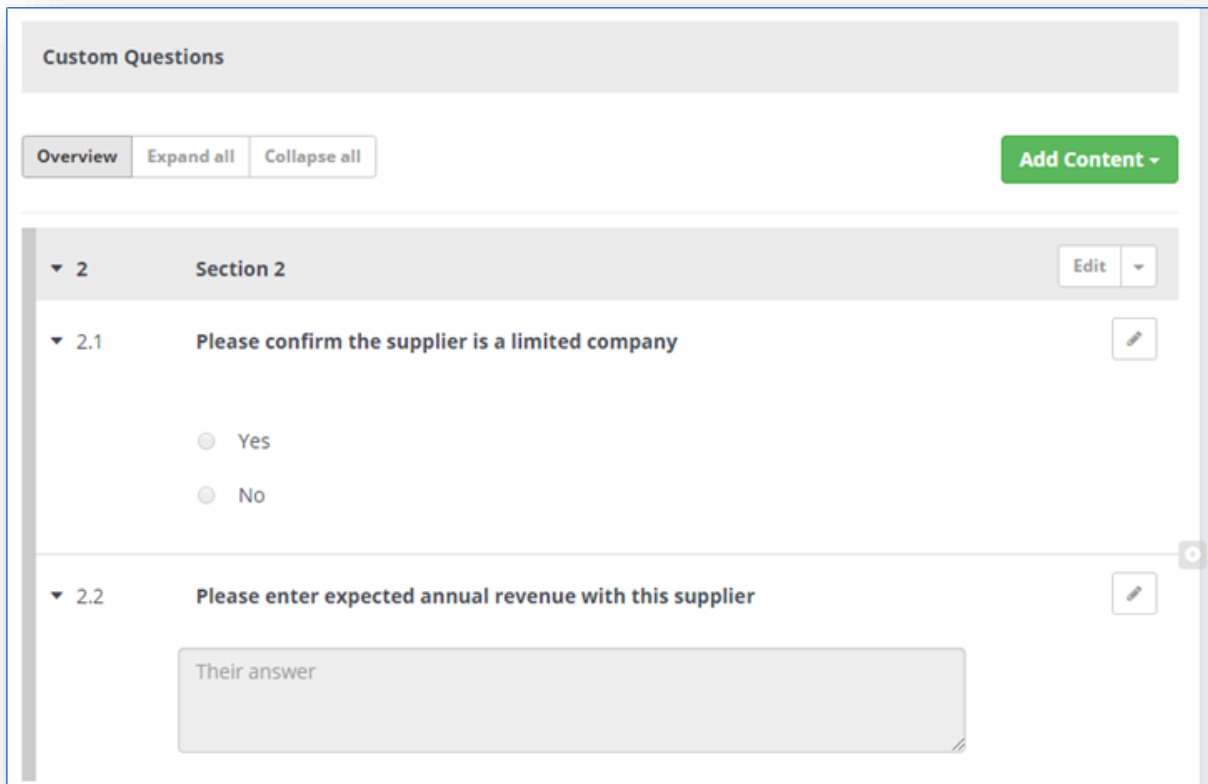
[Add Content ▾](#)

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.



Custom Questions

Overview Expand all Collapse all **Add Content**

▼ 2 **Section 2** Edit

▼ 2.1 **Please confirm the supplier is a limited company** Edit

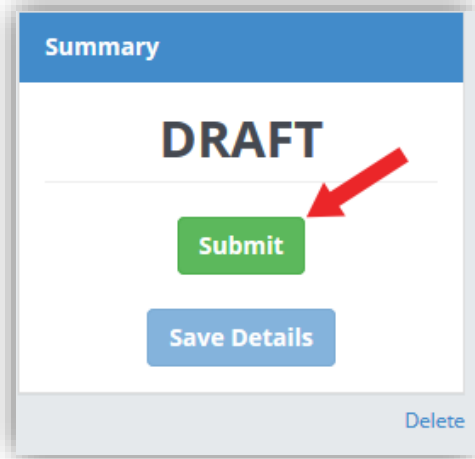
Yes

No

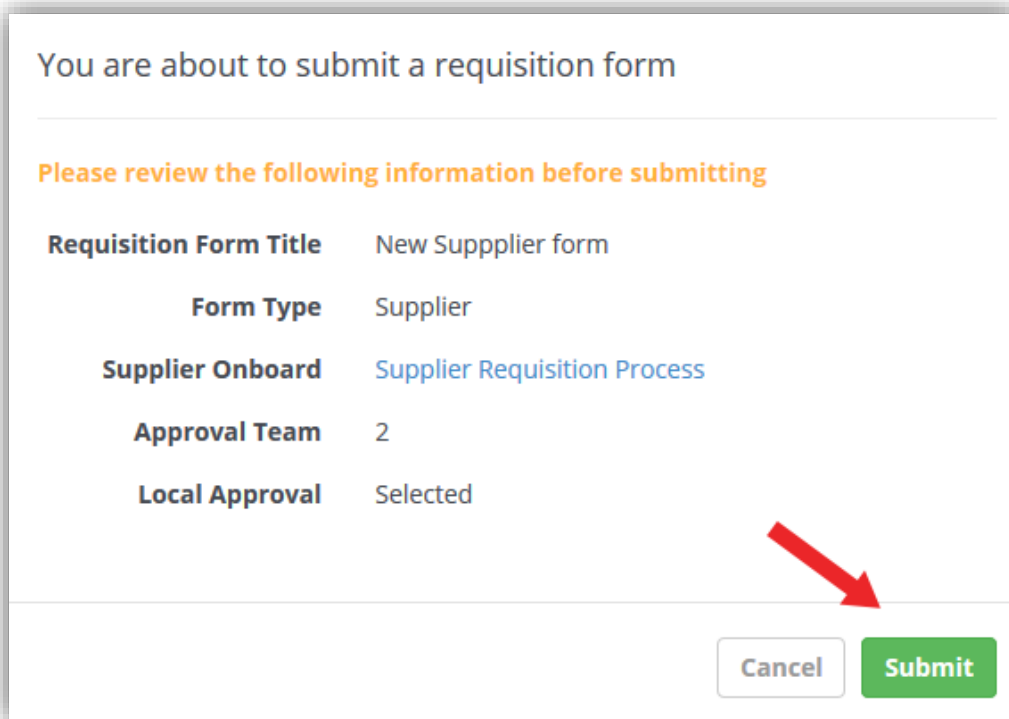
▼ 2.2 **Please enter expected annual revenue with this supplier** Edit

Their answer

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

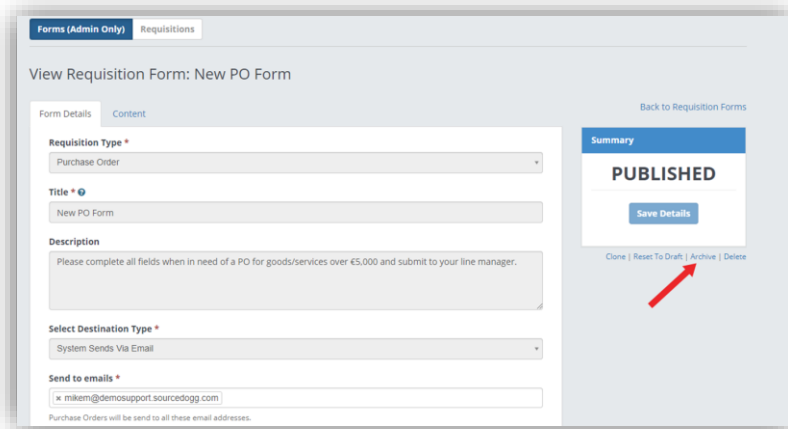


This will display a pop up window with an overview of the form. To confirm, click on the “Submit” button again. If any mistakes are found, “Cancel” can be selected, which will allow further editing of the form.



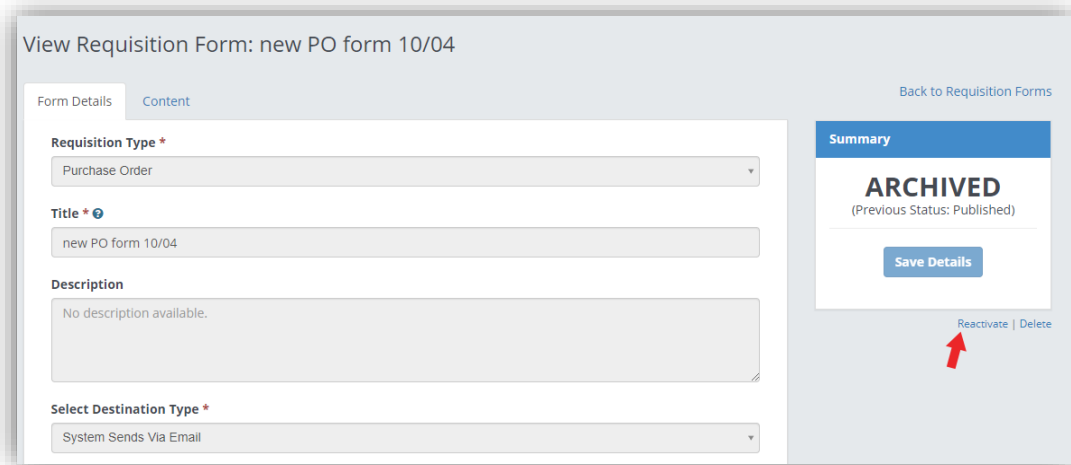
Archiving a Form

Published Requisition Forms that have been used to create a requisition cannot be deleted. However, Forms that are no longer needed can be marked as archived by clicking on the "Archive" button in Form Details page. The button is located underneath the "Summary" side bar.



Once the form has been Archived it will no longer appear in the list of available forms for Requisitioners creating a new requisition. In the Admins view of Forms it appears as greyed out and its Status is changed to Archived.

Archived forms can be Reactivated, by pressing the Reactivate, button on the Form Details page.



Creating a Supplier Requisition

Creation of a Requisition by the business user starts with 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.



Requisition Details

1. Please Select the Requisition Type *

Supplier x ▼

2. Please Select the requisition Form *

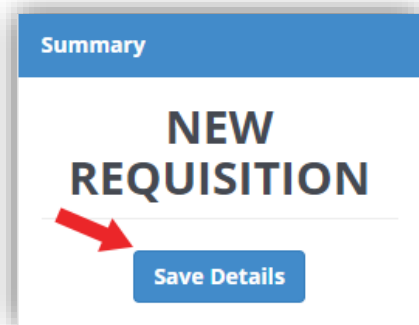
New Supplier form x ▼

3. Provide Requisition Title *

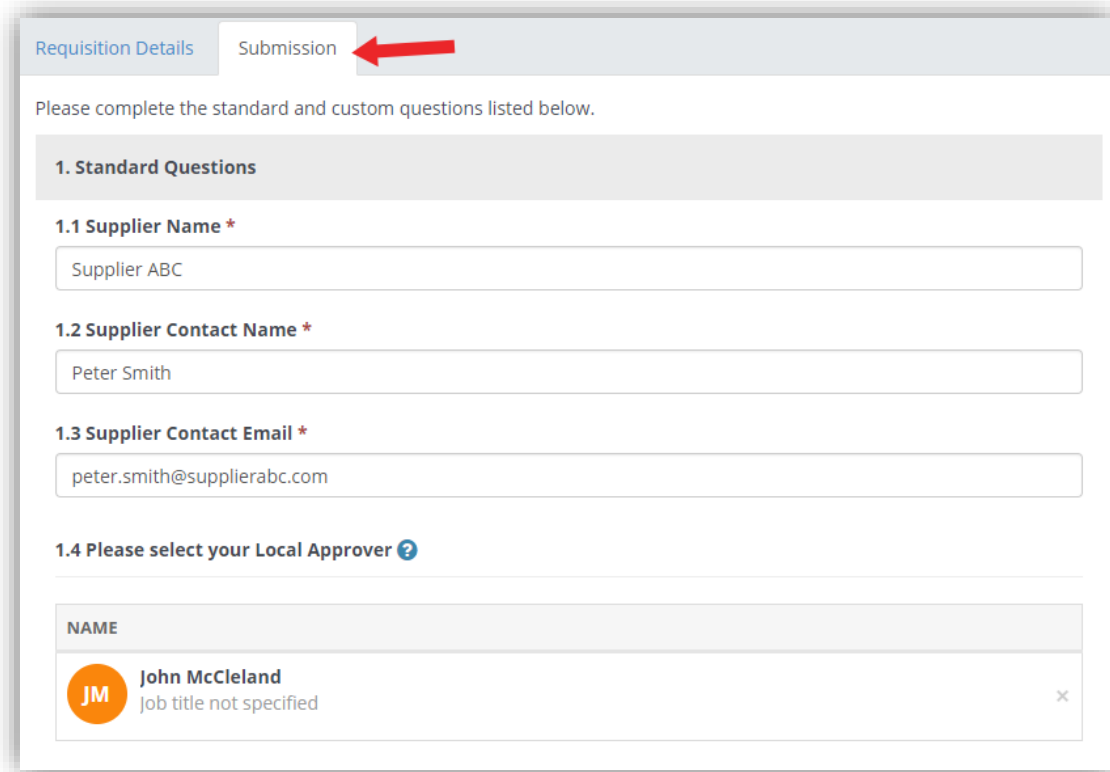
Supplier ABC

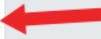
Once “Supplier” is selected from the Type menu, SourceDogg will list all the available requisition forms in the second dropdown list. If an organisation has several Requisitioning forms created, the user can select the most relevant of the form visible to them. The User must also provide a title for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

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



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.

Custom Questions

Overview Expand all Collapse all

▼ 2 Section 2

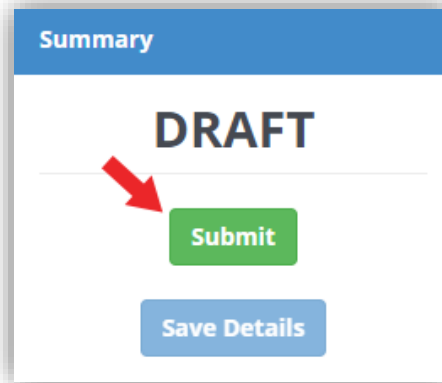
▼ 2.1 Is budget approved for this item? SAVED ✓

Yes
 No

▼ 2.2 Please enter expected annual revenue with this supplier SAVED ✓

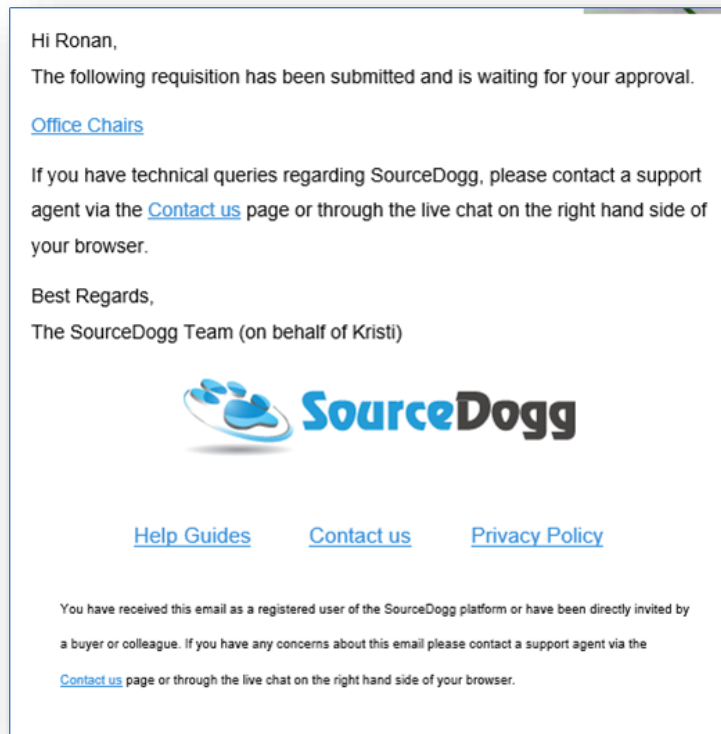
£250k

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

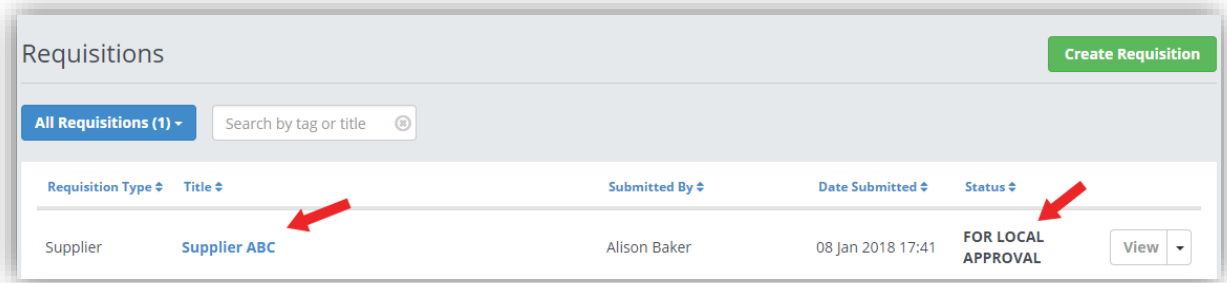


Local Approval

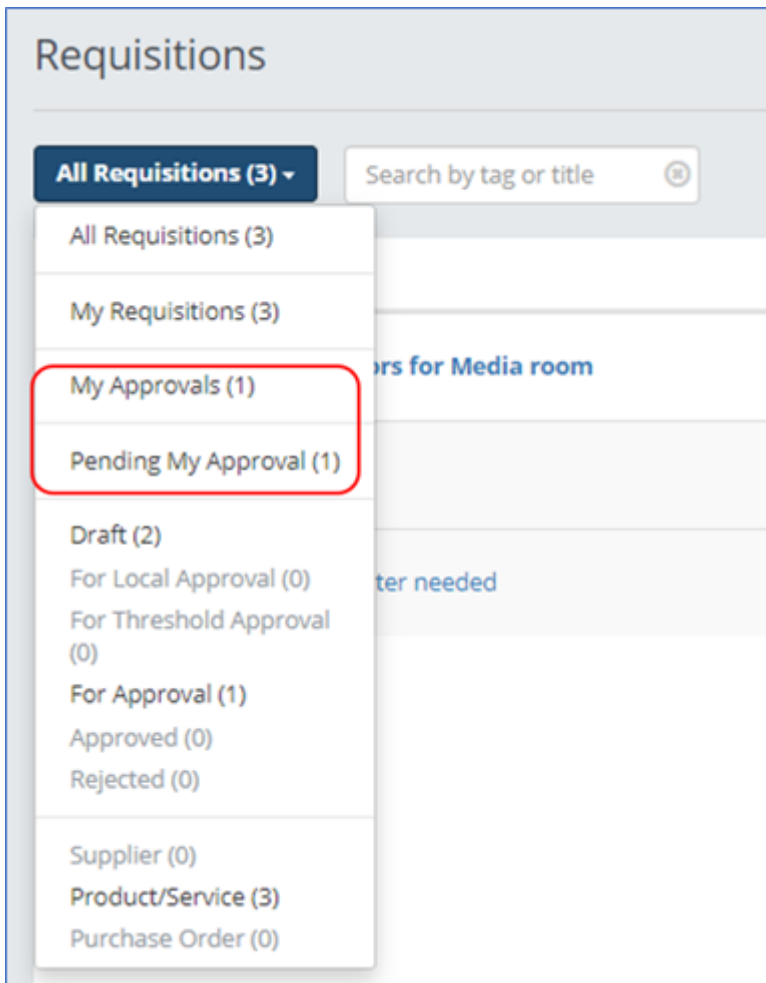
When the Requisition is submitted for approval the Local Approver will be notified by email. Within the email there is a link which will take them to the Requisition.



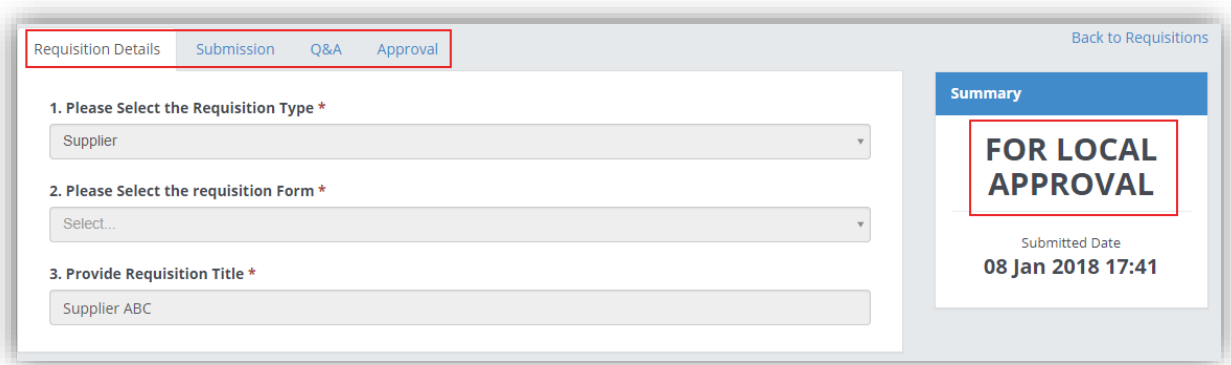
Alternatively, they can login and navigate to the Requisitions area. The Requisitions submitted for approval are displayed in the main requisitions screen.



You can find the Requisitions that are due for approval quickly by filtering the list using the dropdown menu, found when you click on 'All Requisitions', to 'My Approvals' or 'Pending My Approvals'.



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



The Approver can review the information provided by looking in 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.

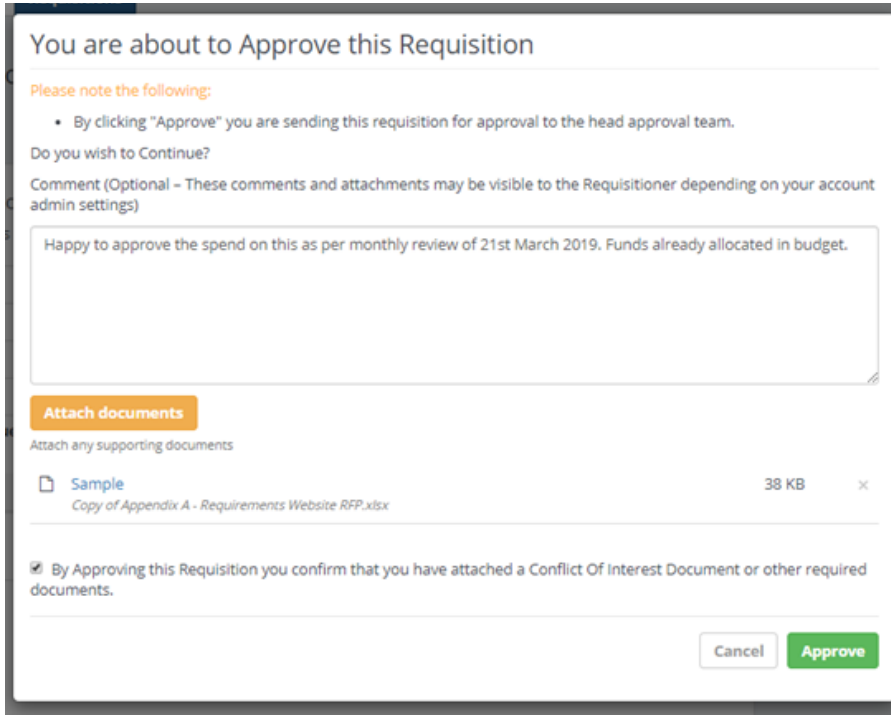
Requisition Approval Decision

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

As part of the approval process, the Approver can include a note and any supporting documents to explain how and why they came to that decision.



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 - These comments and attachments may be visible to the Requisitioner depending on your account admin settings)

Happy to approve the spend on this as per monthly review of 21st March 2019. Funds already allocated in budget.

Attach documents

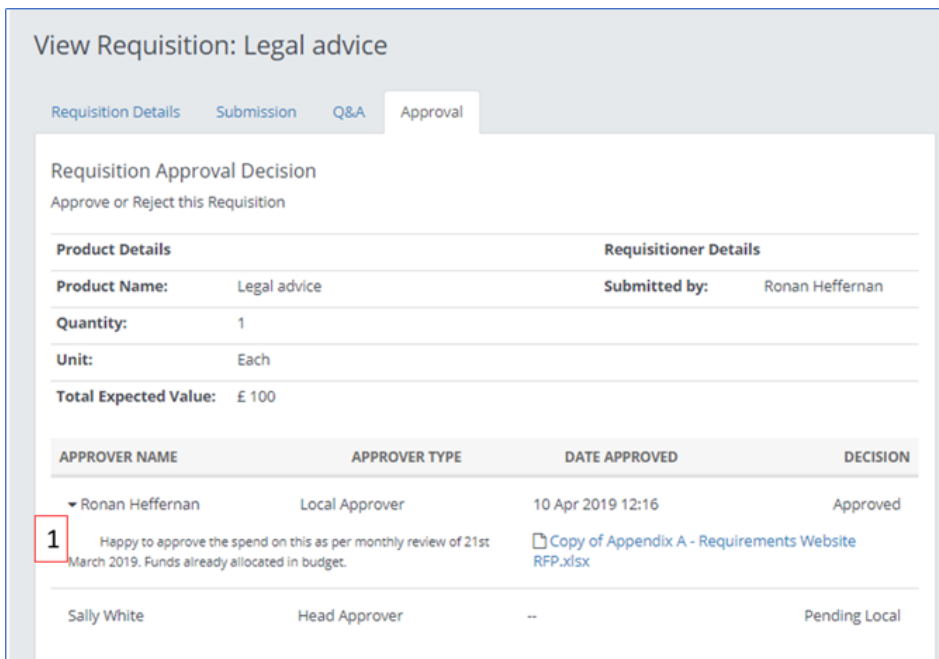
Attach any supporting documents

Sample 38 KB ×
Copy of Appendix A - Requirements Website RFP.xlsx

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

Cancel Approve

These comments are visible to the Requisition team in the 'Approval' tab by clicking on the dropdown arrow (1) as seen in the image below.



View Requisition: Legal advice

Requisition Details Submission Q&A Approval

Requisition Approval Decision
Approve or Reject this Requisition

Product Details		Requisitioner Details	
Product Name:	Legal advice	Submitted by:	Ronan Heffernan
Quantity:	1		
Unit:	Each		
Total Expected Value:	£ 100		

APPROVER NAME	APPROVER TYPE	DATE APPROVED	DECISION
▼ Ronan Heffernan	Local Approver	10 Apr 2019 12:16	Approved
1	Happy to approve the spend on this as per monthly review of 21st March 2019. Funds already allocated in budget.	Copy of Appendix A - Requirements Website RFP.xlsx	
Sally White	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

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 x

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

Head Approval

When the Requisition is approved by the Local Approver(s) the Head Approver will be notified by email. Within the email there is a link which will take them to the Requisition.




The following requisition has been submitted and is waiting for your approval.

[Legal advice](#)

View Requisition

If you have technical queries regarding SourceDogg, please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

Best Regards,
The SourceDogg Team (on behalf of Tonys Test Org)



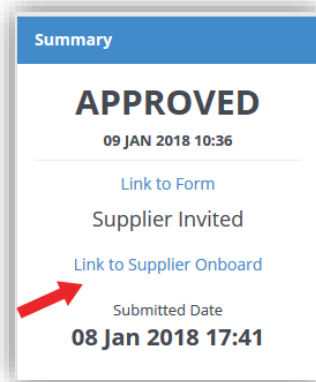
[Help Guides](#) [Contact us](#) [Privacy Policy](#)

You have received this email as a registered user of the SourceDogg platform or have been directly invited by a buyer or colleague. If you have any concerns about this email please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

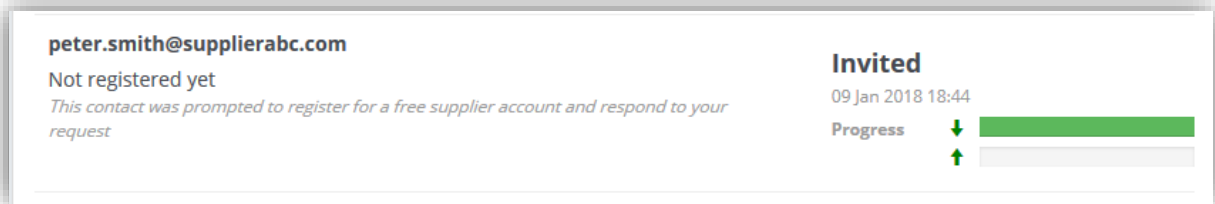
The head approvers can also access the pending Requisitions in the main requisitions screen. In the Approval tab, they are required, just as the Local Approver, to either Approve or Reject the Requisition. They also have the option to leave a comment when approving or rejecting.

Once all the Head Approvers confirm their approval of the Requisition, the details entered by the business user are added 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 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 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

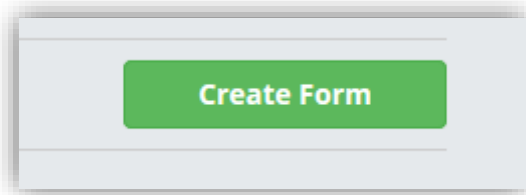
Requisition Type ▾	Title ▾	Submitted By ▾	Date Submitted ▾	Status ▾	
Supplier	Supplier ABC	Alison Baker	08 Jan 2018 17:41	APPROVED	View ▾

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 eould like to create a request from in order to procure the product/service.

Tags can be added and used to search/filter requisitions and group them together based on related project, department, subject matter etc.




Tags

|

Project XYZ x

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
 Caroline Parker Account Manager	Requisitioner ×
 John Lennon Sub-Contractor	Requisitioner ×
 John McClelland Job title not specified	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.

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

Approval / Oversight Team

1. Local Approval (Optional)

You can also set who will be required to approve the requisition. 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. They must be a Requisition Admin or Approver, if the team member is a Reader they will only be able to view the form and cannot make changes to it.

2. Head Approval - Level 1

This is a mandatory level where an approver or team of approvers are expected to each sign off on the requisition. The requisition was only approved if all agreed. If you choose to add a User Group to be an approver only one member needs to approve/reject on behalf of the group.

3. Additional Head Approval Levels (Optional)

There is an option to add multiple layers of approval if they are required from your organisation's processes. Up to 5 levels of Head Approvers can be added and multiple approvers can be added at each level. Each level is only notified of the requirement to approve when the previous level is complete. If an approver Rejects the requisition at any level, this ends the process and the requisition status changes to Rejected. Subsequent levels of approvers are not notified.

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.

Local Approval (Optional) 1

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

Head Approval - Level 1* 2

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;">BC</div> <div> <p>Billy Corgan</p> <p>Senior Procurement Specialist</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Approver ▼</div> ✕
<input type="text" value="Click to add another team member or group"/>	

Please select Approval Team members.

Additional Head Approval Levels (Optional) 3

Set additional approval levels. Note that all individual approvers added to each level will be required to approve. If there are multiple levels, approvers will be invited in sequence according to level.

Requisition Readers who are not expected to Approve can be added via a separate “Oversight Team”. These users have access to view the requisition and will receive related notifications.

Oversight Team (Reader Only) (Optional)

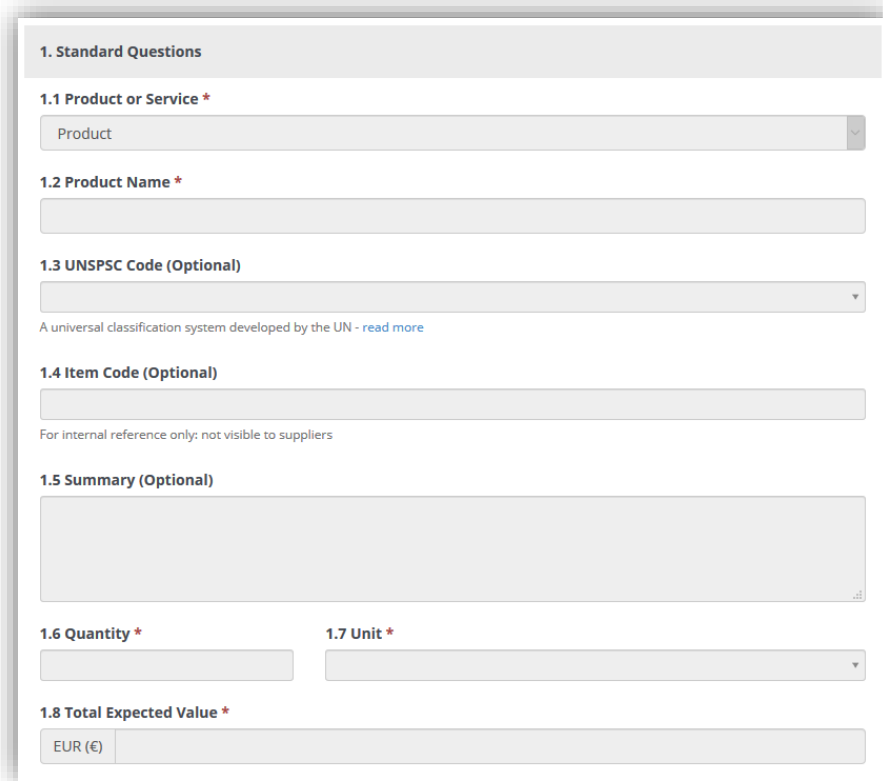
Add any additional users that need to monitor the requisitions from this form but do not have approval responsibilities.

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;">AC</div> <div> <p>Addison Chambers</p> <p>Operator</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Reader ▼</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;">BD</div> <div> <p>Basil Dale</p> <p>Operator</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px;">Reader ▼</div> ✕
<input type="text" value="Click to add another team member or group"/>	

Please select Oversight Team members.

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)

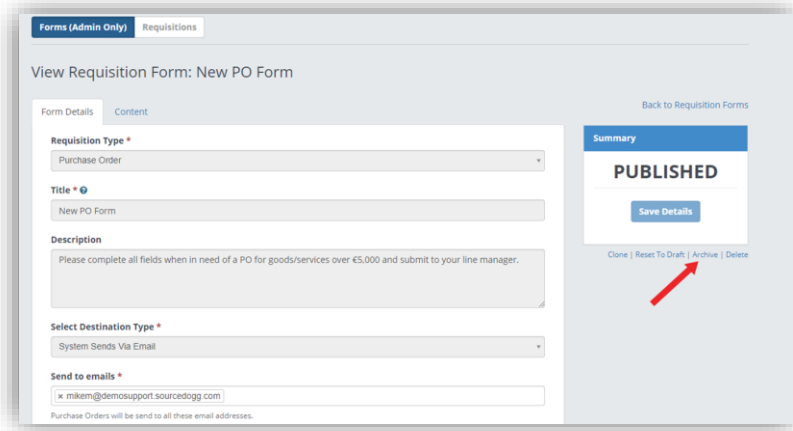
1.6 Quantity * **1.7 Unit ***

1.8 Total Expected Value *

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

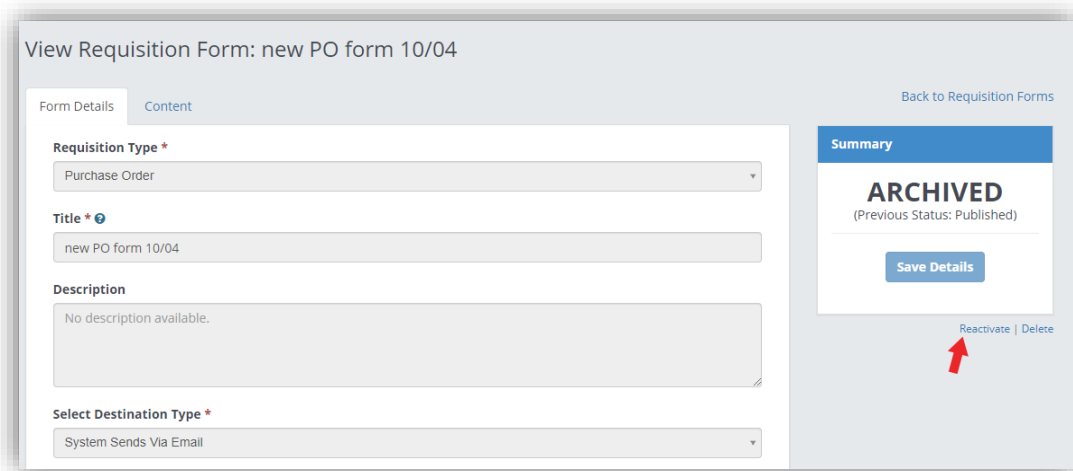
Archiving a Form

Published Requisition Forms that have been used to create a requisition cannot be deleted. However, Forms that are no longer needed can be marked as archived by clicking on the "Archive" button in Form Details page. The button is located underneath the "Summary" side bar.



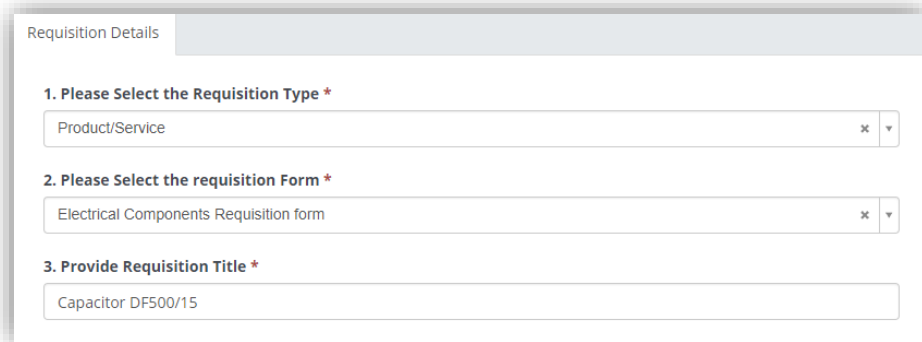
Once the form has been Archived it will no longer appear in the list of available forms for Requisitioners creating a new requisition. In the Admins view of Forms it appears as greyed out and its Status is changed to Archived.

Archived forms can be Reactivated, by pressing the Reactivate, button on the Form Details page.



Creating a Product / Service Requisition

The process in 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 *

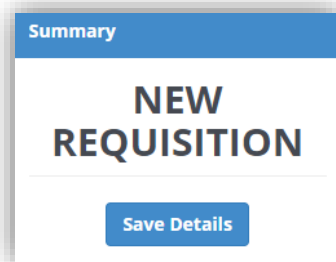
Product/Service x ▾

2. Please Select the requisition Form *

Electrical Components Requisition form x ▾

3. Provide Requisition Title *

Capacitor DF500/15

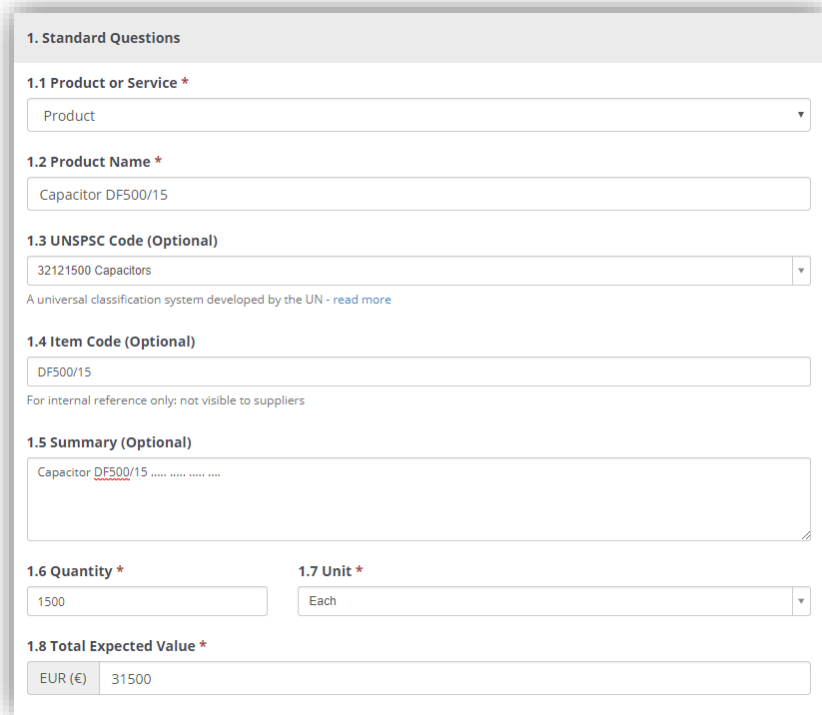


Summary

**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 *
Product

1.2 Product Name *
Capacitor DF500/15

1.3 UNSPSC Code (Optional)
32121500 Capacitors
A universal classification system developed by the UN - [read more](#)

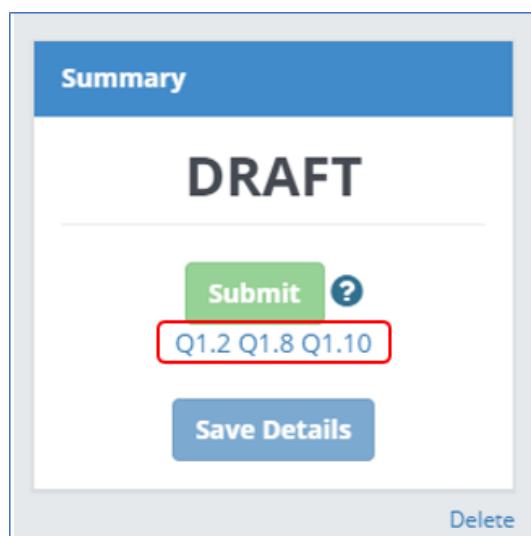
1.4 Item Code (Optional)
DF500/15
For internal reference only; not visible to suppliers

1.5 Summary (Optional)
Capacitor DF500/15

1.6 Quantity * 1500 **1.7 Unit *** Each

1.8 Total Expected Value *
EUR (€) 31500

If there are mandatory questions, standard or custom, to be answered the requisitioner will not be able to submit and the questions will be listed under the unavailable 'Submit' button.



Summary

DRAFT

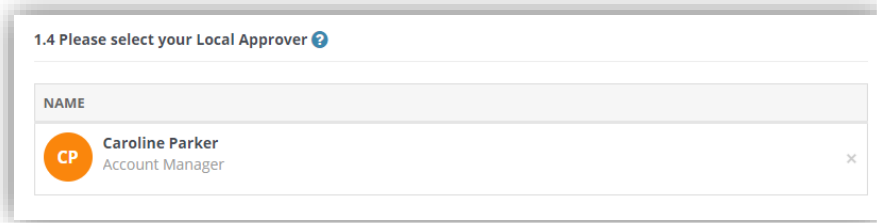
Submit ?

Q1.2 Q1.8 Q1.10

Save Details

Delete

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

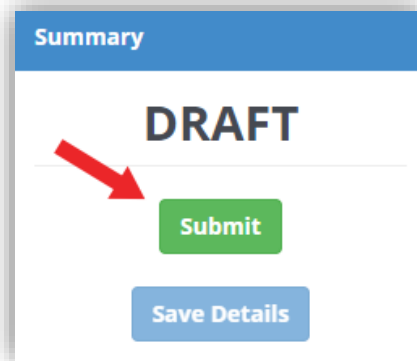


1.4 Please select your Local Approver ?

NAME

CP Caroline Parker
Account Manager ×

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



Summary

DRAFT

Submit

Save Details

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. When the Requisition is approved by the Head Approver the Above threshold Approver will be notified by email. Within the email there is a link which will take them to the Requisition.


The following requisition has been submitted and is waiting for your approval.

[Title X](#)

[View Requisition](#)

If you have technical queries regarding SourceDogg, please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

Best Regards,
The SourceDogg Team (on behalf of Procurement-Ireland)



[Help Guides](#) [Contact us](#) [Privacy Policy](#)

You have received this email as a registered user of the SourceDogg platform or have been directly invited by a buyer or colleague. If you have any concerns about this email please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

The Approver clicks on Approve or Reject button and this is the final Approval required to process the Requisition.

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	--	<input type="button" value="Approve"/> <input type="button" value="Reject"/>

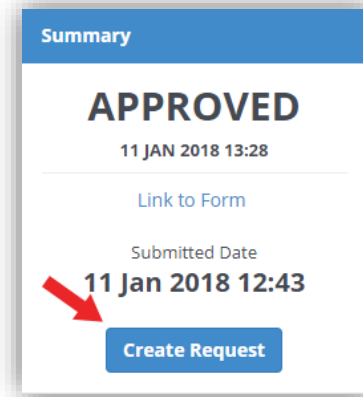
You are about to Approve this Requisition

Please note the following:

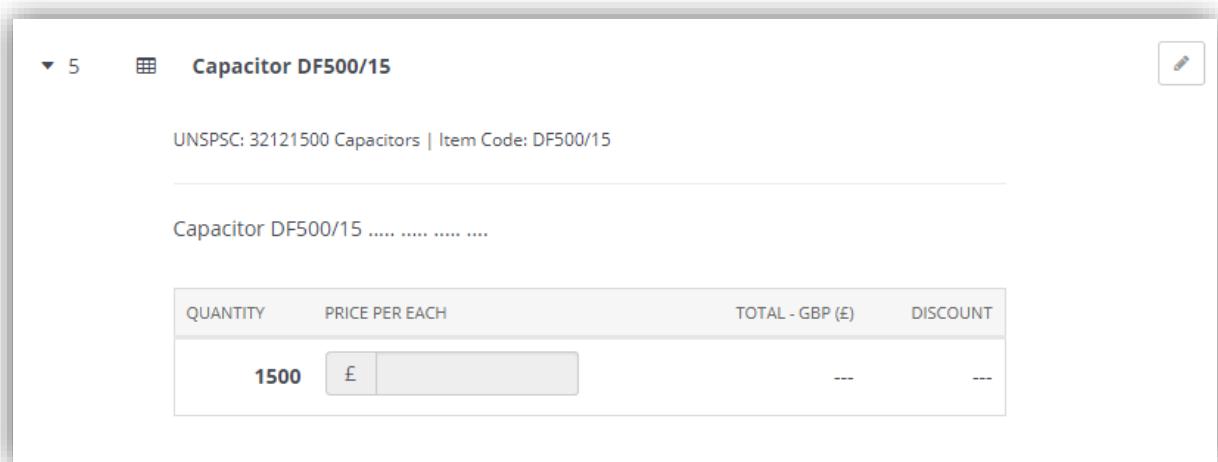
- By approving this requisition, you are creating a request for this product/service using the following template - "Electrical components - Request for Pricing template".
- The person who created this requisition will be notified that their requisition has been approved.

Do you wish to Continue?

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.



The Requisitioner will be notified of this via email.

Dear Sir/Madam,

You have submitted a Requisition for the following product Title X name


This Requisition has been approved by the procurement team and product has been added to the relevant request.

[View Requisition](#)

You can see the request status or contact the Procurement Team from The Requisition by clicking above.

If you have technical queries regarding SourceDogg, please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

Best Regards,
The SourceDogg Team (on behalf of Procurement-Ireland)



[Help Guides](#) [Contact us](#) [Privacy Policy](#)

You have received this email as a registered user of the SourceDogg platform or have been directly invited by a buyer or colleague. If you have any concerns about this email please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

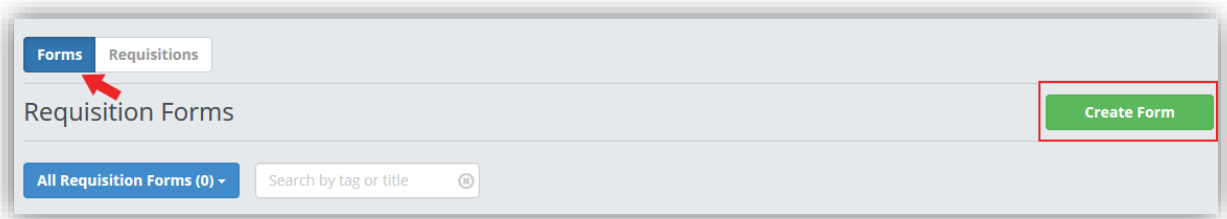
Purchase order

Creating Purchase Order form

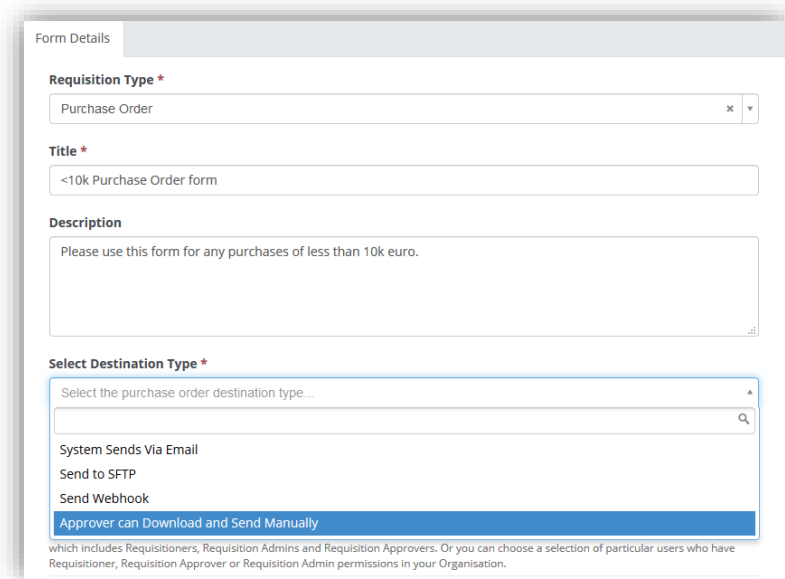
Like with the Supplier and Product/Service requisitions, the Purchase order workflow starts with the procurement team who creates PO Requisition form, selecting one of the several options how the PO will be generated and sent to supplier. The options that can be selected are:

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.



Form Details

Requisition Type *
Purchase Order

Title *
<10k Purchase Order form

Description
Please use this form for any purchases of less than 10k euro.

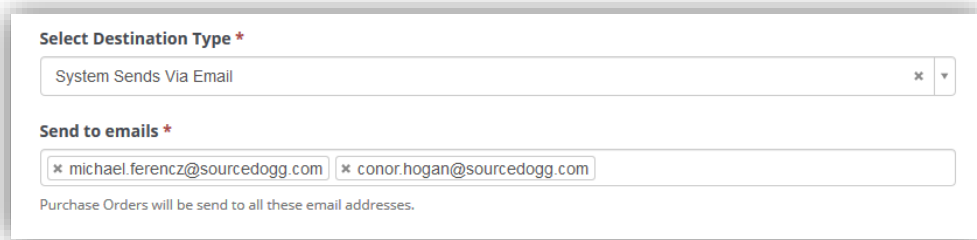
Select Destination Type *
Select the purchase order destination type...

- System Sends Via Email
- Send to SFTP
- Send Webhook
- Approver can Download and Send Manually**

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 4 options will be described below:

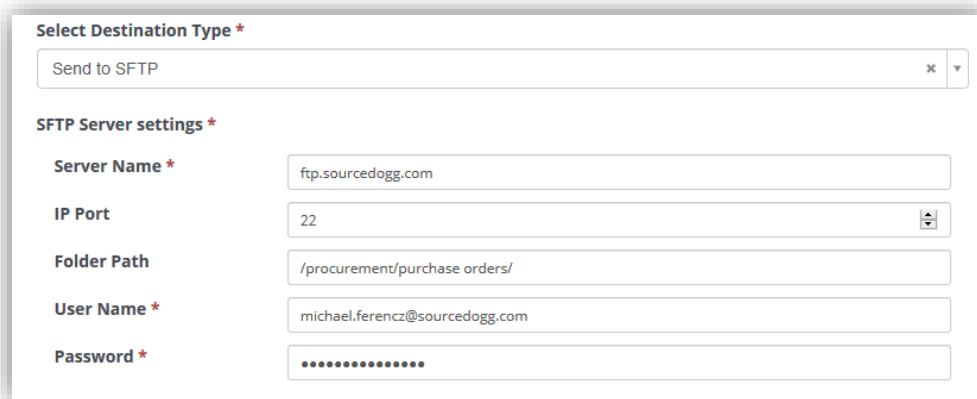
1. **System Sends Via Email** – using this option will allow you to enter multiple recipients for generated Purchase Orders, once approved these will be delivered to all email addresses entered in this setup page.



The screenshot shows a form with the following elements:

- Select Destination Type ***: A dropdown menu with the selected option "System Sends Via Email".
- Send to emails ***: A multi-select input field containing two email addresses: "michael.ferencz@sourcedogg.com" and "conor.hogan@sourcedogg.com".
- Below the email field, a note states: "Purchase Orders will be send to all these email addresses."

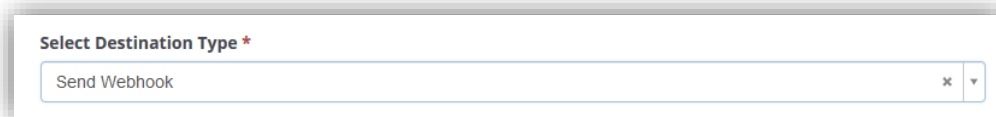
2. **Send to SFTP** – with this option the generated Purchase Orders will be uploaded to secure FPT server. In this screen you need to enter all settings of the server.



The screenshot shows a form with the following elements:

- Select Destination Type ***: A dropdown menu with the selected option "Send to SFTP".
- SFTP Server settings ***: A section containing several input fields:
 - Server Name ***: "ftp.sourcedogg.com"
 - IP Port**: "22" (with a small up/down arrow icon)
 - Folder Path**: "/procurement/purchase orders/"
 - User Name ***: "michael.ferencz@sourcedogg.com"
 - Password ***: A field filled with dots to mask the 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

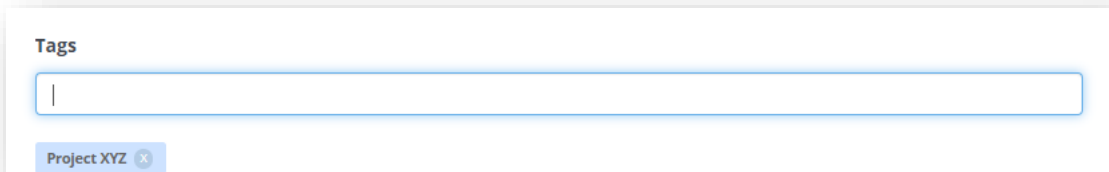


The screenshot shows a form with the following element:

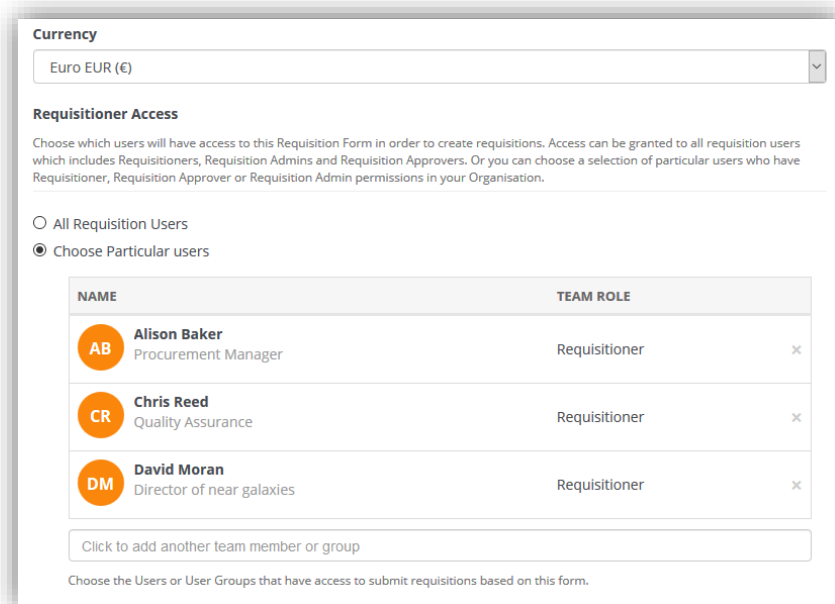
- Select Destination Type ***: A dropdown menu with the selected option "Send Webhook".

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

Tags can be added and used to search/filter requisitions and group them together based on related project, department, subject matter etc.



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 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 screenshots.

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: 25px; height: 25px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">RH</div> <div> <p>Ronan Heffernan</p> <p>Job title not specified</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Approver ▼ × </div>
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 25px; height: 25px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">SW</div> <div> <p>Sally White</p> <p>Managing Director</p> </div> </div>	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Reader ▼ × </div>

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

Please select Approval / Oversight Team members.

Approval / Oversight Team – these are users responsible for final approval of the requisition, generally, it would be personnel from the procurement/buying team

4. Local Approval (Optional)

You can also set who will be required to approve the requisition. 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. They must be a Requisition Admin or Approver, if the team member is a Reader they will only be able to view the form and cannot make changes to it.

5. Head Approval - Level 1

This is a mandatory level where an approver or team of approvers are expected to each sign off on the requisition. The requisition was only approved if all agreed.


6. Additional Head Approval Levels (Optional)

There is an option to add multiple layers of approval if they are required from your organisation's processes. Up to 5 levels of Head Approvers can be added and multiple approvers can be added at each level. Each level is only notified of the requirement to approve when the previous level is complete. If an approver Rejects the requisition at any level, this ends the process and the requisition status changes to Rejected. Subsequent levels of approvers are not notified.

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.

Local Approval (Optional) 1
 Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

Head Approval - Level 1* 2



NAME	TEAM ROLE
 Billy Corgan Senior Procurement Specialist	Approver <input type="button" value="x"/>

Please select Approval Team members.

3 **Additional Head Approval Levels (Optional)**
 Set additional approval levels. Note that all individual approvers added to each level will be required to approve. If there are multiple levels, approvers will be invited in sequence according to level.

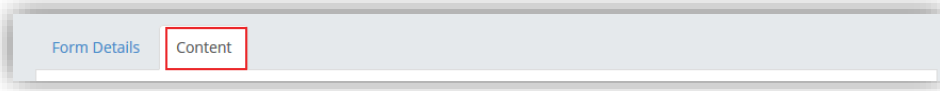
Requisition Readers who are not expected to Approve can be added via a separate “Oversight Team”. These users have access to view the requisition and will receive related notifications.

Oversight Team (Reader Only) (Optional)
 Add any additional users that need to monitor the requisitions from this form but do not have approval responsibilities.

NAME	TEAM ROLE
 Addison Chambers Operator	Reader <input type="button" value="x"/>
 Basil Dale Operator	Reader <input type="button" value="x"/>

Please select Oversight Team members.

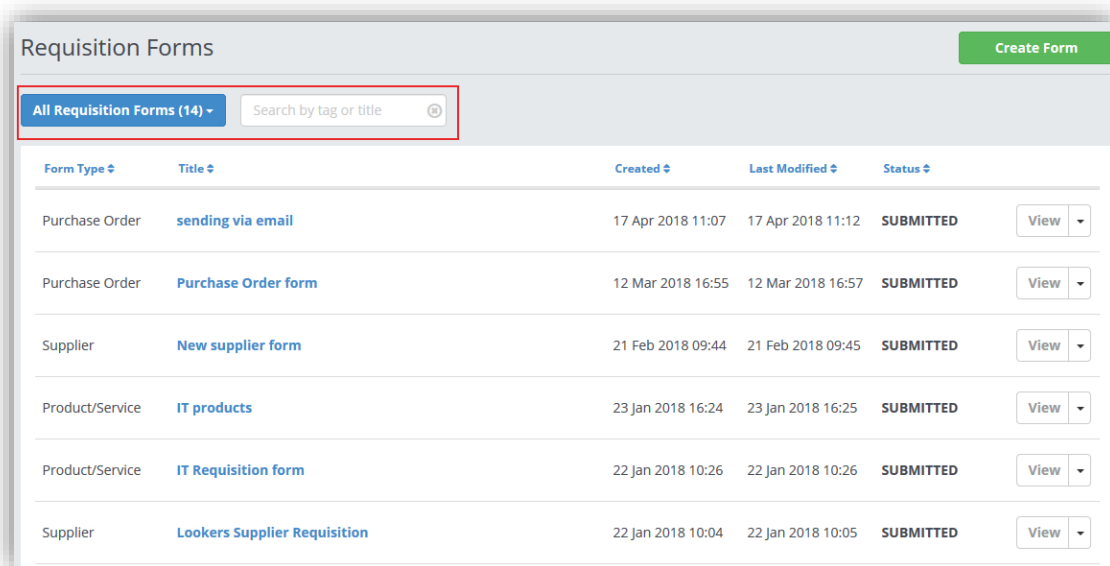
Once all information is entered, the user must click on the “Save Details” button to continue. This action will add the “Content” tab where custom questions can be added, just as with the Supplier Requisitions [here](#).



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.

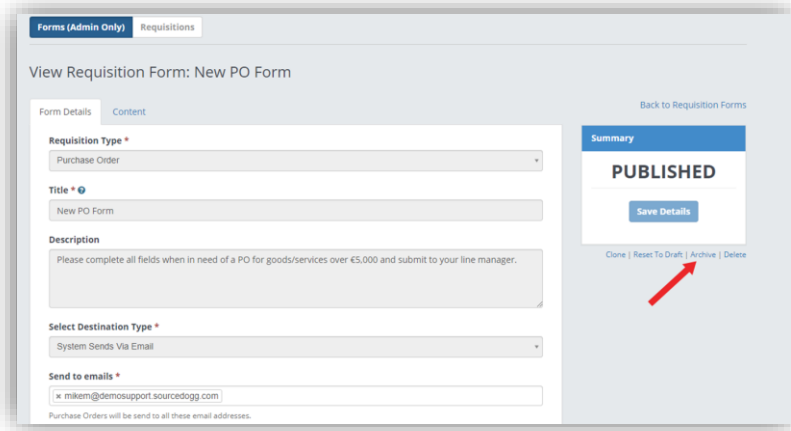
To see all the current forms, you can visit the main Requisitions Module screen, where these are listed. You can filter down on the type of form using the blue button in the top left part of the page. You can also search the form by entering the title into the search-box and hitting Enter.



Form Type	Title	Created	Last Modified	Status	
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

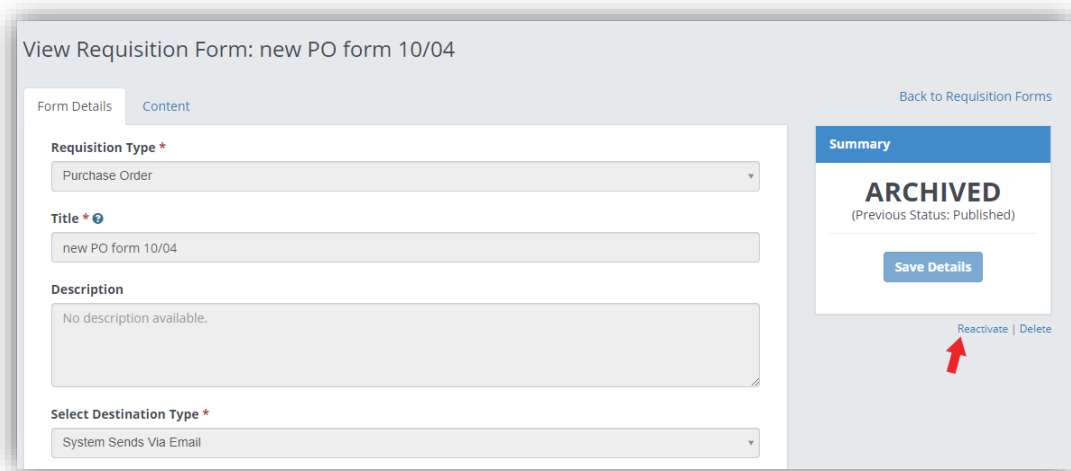
Archiving a Form

Published Requisition Forms that have been used to create a requisition cannot be deleted. However, Forms that are no longer needed can be marked as archived by clicking on the "Archive" button in Form Details page. The button is located underneath the "Summary" side bar.



Once the form has been Archived it will no longer appear in the list of available forms for Requisitioners creating a new requisition. In the Admins view of Forms it appears as greyed out and its Status is changed to Archived.

Archived forms can be Reactivated, by pressing the Reactivate, button on the Form Details page.

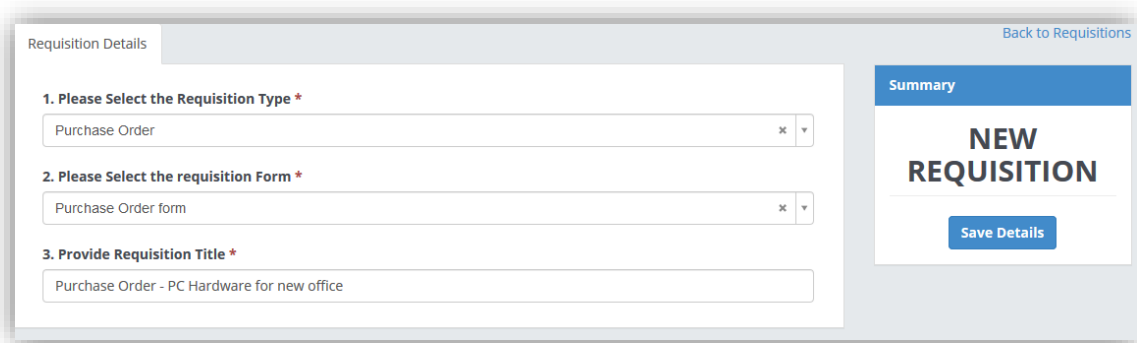


Creating a Purchase order

Creation of a Purchase Order by the business user starts with 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, 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.

Please complete the standard and custom questions listed below.

1. Standard Questions

1.1 Supplier Name *

Supplier XYZ

1.2 Supplier Contact Name *

Peter Smith

1.3 Supplier Contact Email *

p.smith@supplierxyz.com

1.4 Supplier Address *

15 Downing Street
London
United Kingdom
SW1A 2AA

1.5 Purchase Order Value *

EUR (€) 28000

1.6 Purchase Order Description

PC Hardware for our new office in Manchester

Custom Questions

Overview

Expand all

Collapse all

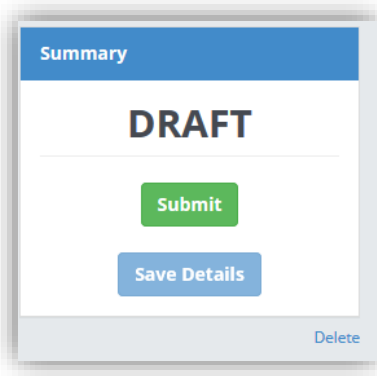
▼ 2 **Please confirm why the product is needed?** SAVED ✔

To purchase new IT equipment for the HR department

▼ 3 **Please confirm the lead time required for this purchase.** SAVED ✔

2-3 weeks

When all the questions are answered, 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.

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 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](#)

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

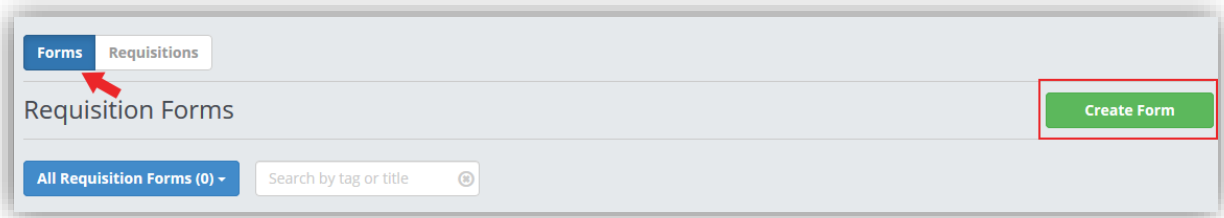
Quantity	Unit	Description	Unit Price	Total
1	N/A	PC Hardware for our new office in Manchester	€28000	
TOTAL				€28000

Authorisation

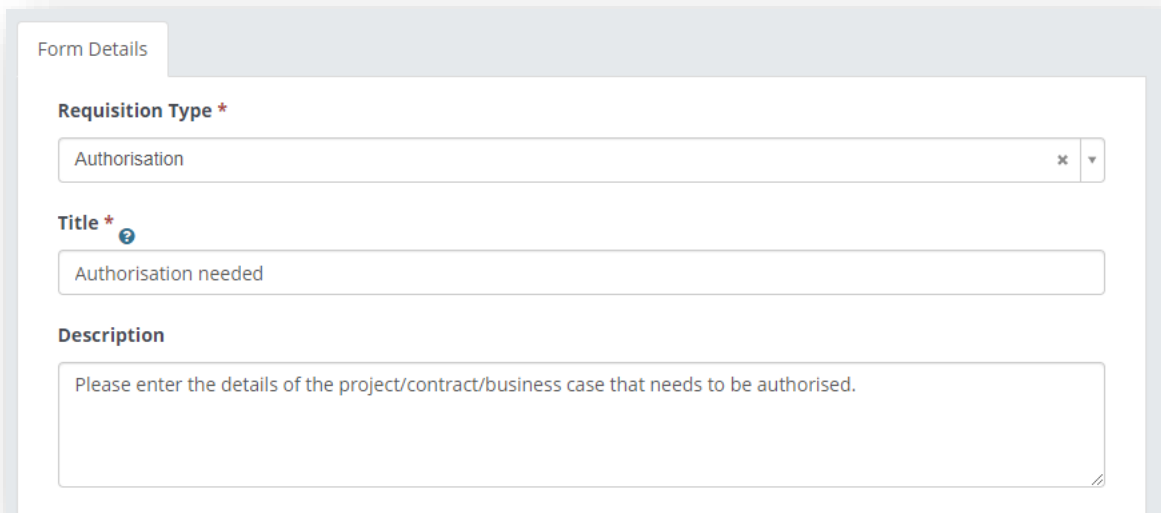
Creating Authorisation form

Like with the other requisitions, the Authorisation workflow starts with the procurement team who creates the Authorisation form, this will be a form that requisitioners complete to request an authorisation.

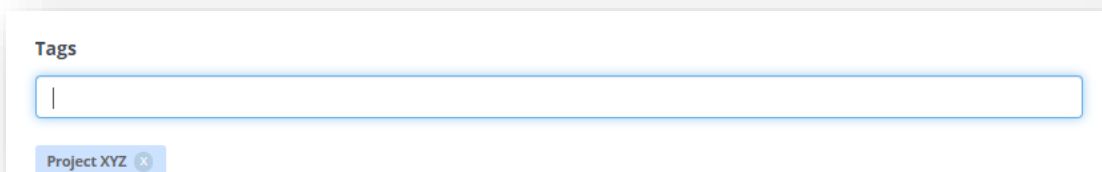
To create a new form, Requisition Admins click on the “Create Form” button in their main Requisitions screen.



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



Tags can be added and used to search/filter requisitions and group them together based on related project, department, subject matter etc.






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 x
 Declan Folan Category Manager XYZ	Requisitioner x
 Chris Reed Quality Assurance	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.

Approval / Oversight Team

7. Local Approval (Optional)

You can also set who will be required to approve the requisition. 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. They must be a Requisition Admin or Approver, if the team member is a Reader they will only be able to view the form and cannot make changes to it.

8. Head Approval - Level 1

This is a mandatory level where an approver or team of approvers are expected to each sign off on the requisition. The requisition was only approved if all agreed. If you choose to add a User Group to be an approver only one member needs to approve/reject on behalf of the group.


9. Additional Head Approval Levels (Optional)

There is an option to add multiple layers of approval if they are required from your organisation's processes. Up to 5 levels of Head Approvers can be added and multiple approvers can be added at each level. Each level is only notified of the requirement to approve when the previous level is complete. If an approver Rejects the requisition at any level, this ends the process and the requisition status changes to Rejected. Subsequent levels of approvers are not notified.

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.

Local Approval (Optional) 1
 Require the requisitioner to submit the requisition to their local approver before it is submitted to the Approval Team.

Head Approval - Level 1* 2

NAME	TEAM ROLE
 Billy Corgan Senior Procurement Specialist	Approver <input type="button" value="x"/>



Click to add another team member or group

Please select Approval Team members.

3 **Additional Head Approval Levels (Optional)**
 Set additional approval levels. Note that all individual approvers added to each level will be required to approve. If there are multiple levels, approvers will be invited in sequence according to level.

Requisition Readers who are not expected to Approve can be added via a separate “Oversight Team”. These users have access to view the requisition and will receive related notifications.

Oversight Team (Reader Only) (Optional)
 Add any additional users that need to monitor the requisitions from this form but do not have approval responsibilities.

NAME	TEAM ROLE
 Addison Chambers Operator	Reader <input type="button" value="x"/>
 Basil Dale Operator	Reader <input type="button" value="x"/>

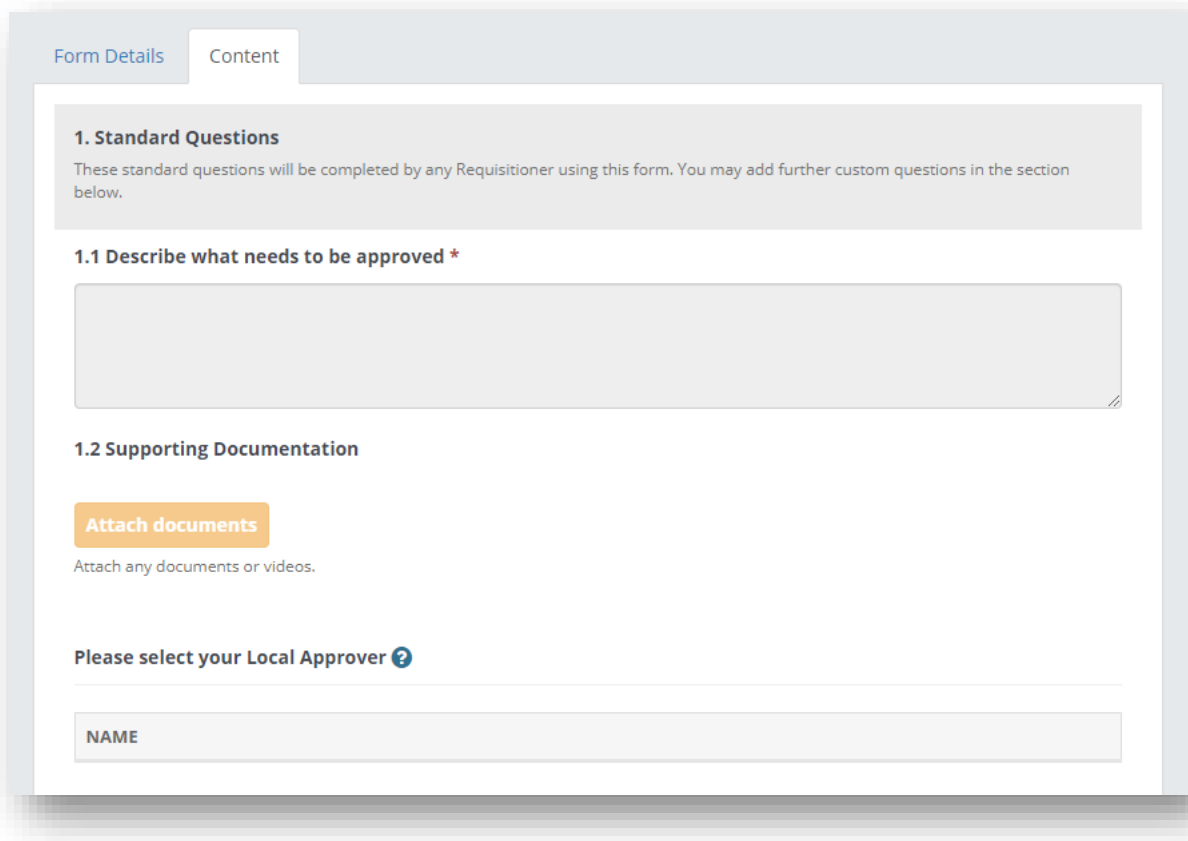
Click to add another team member or group

Please select Oversight Team members.

Creating the content

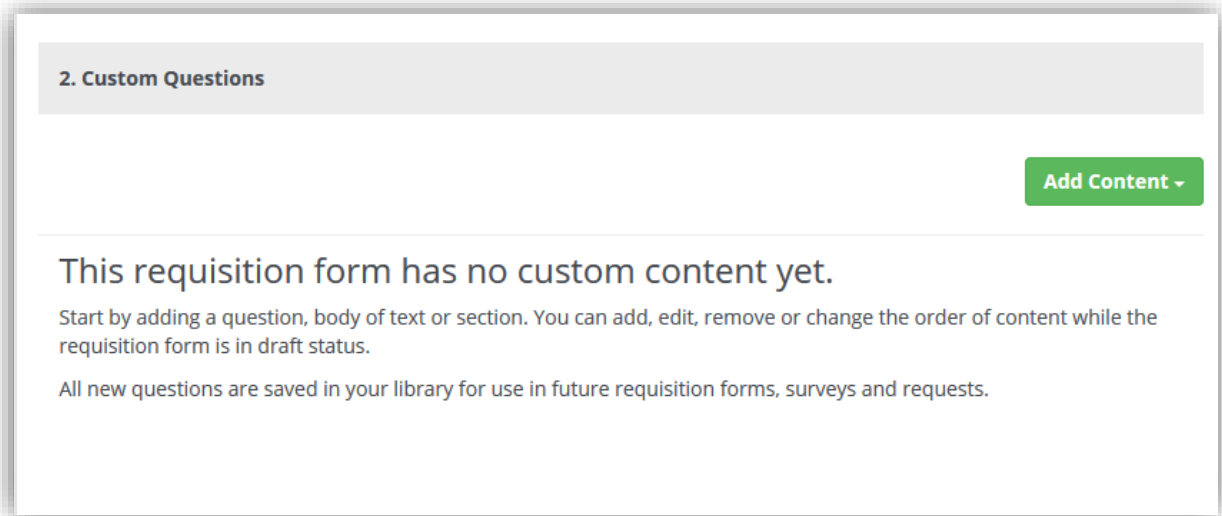
Once all the access and approval personnel are selected, the requisition form can be saved and a new tab will appear. This is the ‘Content’ tab, where Standard Questions are displayed. These are mandatory fields included in the system by default that cannot be changed on a per account basis.

Requisitioners must answer these questions before they can submit. The supplier details will be used for invitation to SourceDogg.



The screenshot shows a web form with two tabs: 'Form Details' and 'Content'. The 'Content' tab is active. The form is titled '1. Standard Questions' and includes a sub-section '1.1 Describe what needs to be approved *' with a large text input area. Below this is '1.2 Supporting Documentation' with an 'Attach documents' button and a note to 'Attach any documents or videos.' At the bottom, there is a section 'Please select your Local Approver ?' with a dropdown menu labeled 'NAME'.

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. These questions can be made mandatory depending on your requirements.

Custom Questions

Overview Expand all Collapse all Add Content ▾

▼ 2 **Section 2** Edit ▾

▼ 2.1 **Please confirm the supplier is a limited company** ✎

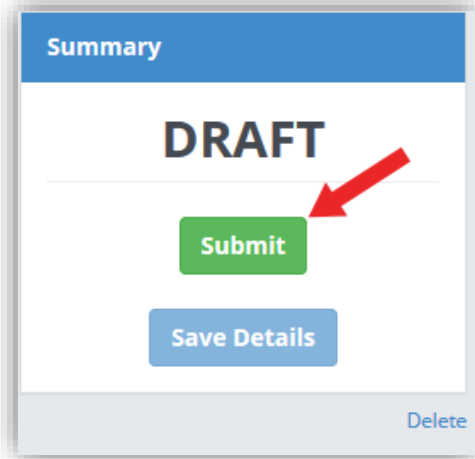
Yes

No

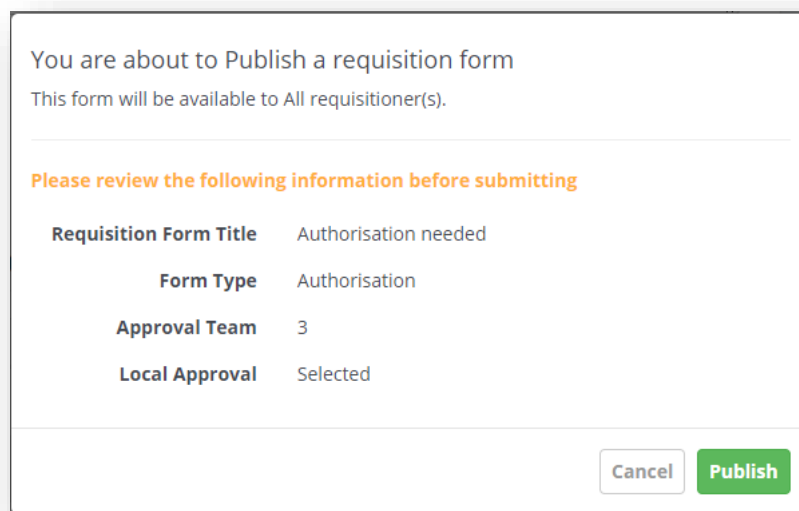
▼ 2.2 **Please enter expected annual revenue with this supplier** ✎

Their answer

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

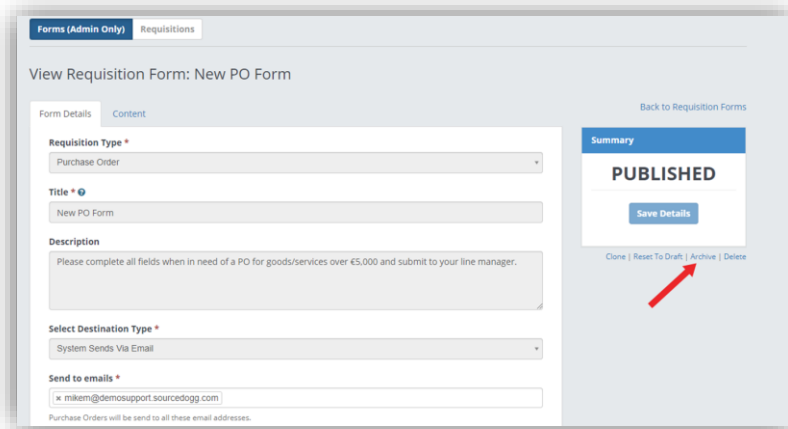


This will display a pop up window with an overview of the form. To confirm, click on the “Submit” button again. If any mistakes are found, “Cancel” can be selected, which will allow further editing of the form.



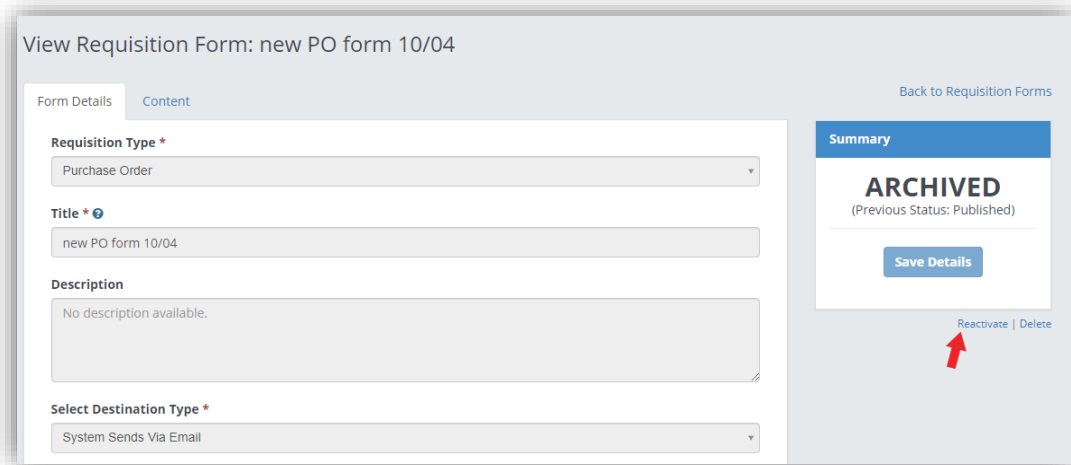
Archiving a Form

Published Requisition Forms that have been used to create a requisition cannot be deleted. However, Forms that are no longer needed can be marked as archived by clicking on the "Archive" button in Form Details page. The button is located underneath the "Summary" side bar.



Once the form has been Archived it will no longer appear in the list of available forms for Requisitioners creating a new requisition. In the Admins view of Forms it appears as greyed out and its Status is changed to Archived.

Archived forms can be Reactivated, by pressing the Reactivate, button on the Form Details page.

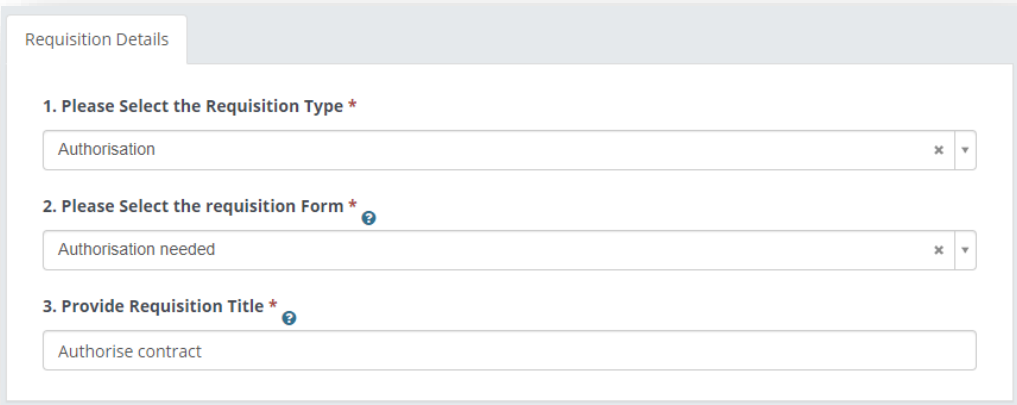


Creating an Authorisation Requisition

Creation of a Requisition by the business user starts with clicking on the “Create Requisition” button. This will open the menu where users select what type of requisition they want to create. Select “Authorisation” from the list.



Create Requisition



Requisition Details

1. Please Select the Requisition Type *

Authorisation

2. Please Select the requisition Form *

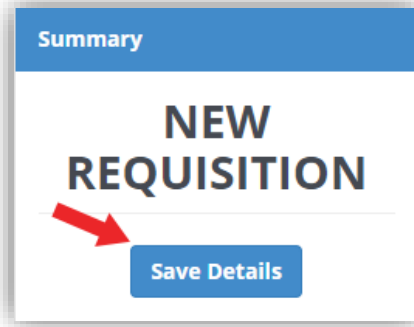
Authorisation needed

3. Provide Requisition Title *

Authorise contract

Once “Authorisation” 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. If the form requires a Local Approver, this is also added at this stage.

Requisition Details
Submission

Please complete the standard and custom questions listed below.

1. Standard Questions

These standard questions will be completed by any Requisitioner using this form. You may add further custom questions in the section below.

1.1 Describe what needs to be approved *

Please approve the attached IT services contract

1.2 Supporting Documentation

Attach documents

Attach any documents or videos.

IT services contract.docx
12 KB
×

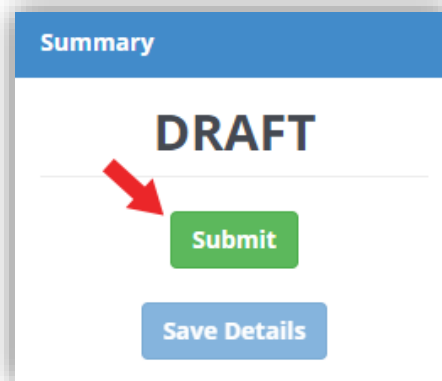
Tags

This requisition form has not been tagged yet

Please select your Local Approver ?

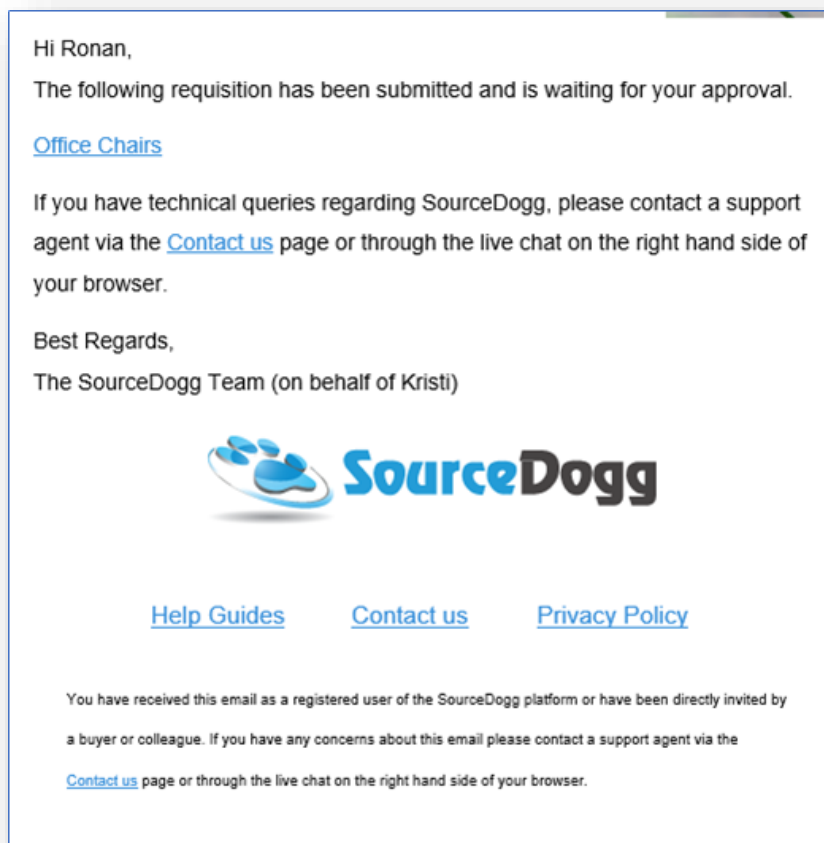
NAME
<div style="display: flex; align-items: center;"> <div style="background-color: #f4a460; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin-right: 5px;">BC</div> <div> <p>Billy Corgan</p> <p>Senior Procurement Specialist</p> </div> <div style="margin-left: auto;">×</div> </div>

The requisitioner also answers any custom questions that were set by the admin user that created the form. When all the information is entered, the user clicks on “Save Details” and then “Submit” to submit for approval by the Approval team.

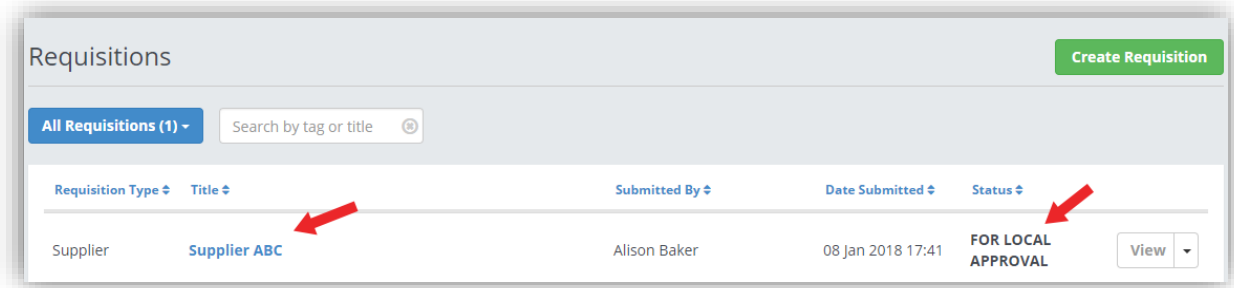


Local Approval

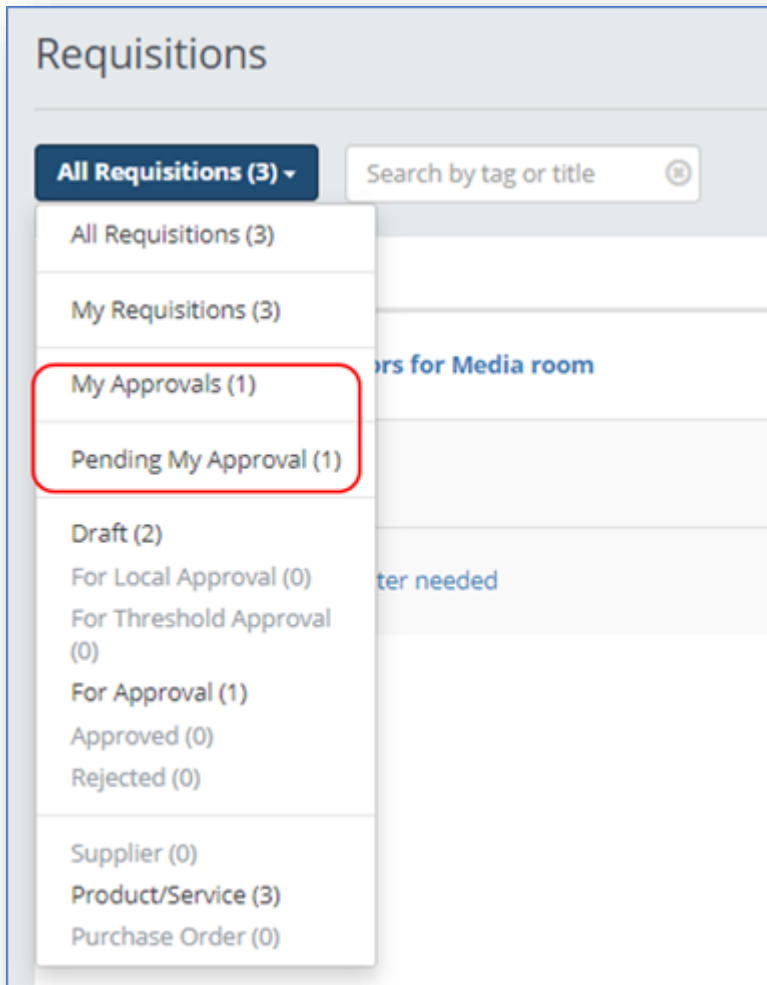
When the Requisition is submitted for approval the Local Approver will be notified by email. Within the email there is a link which will take them to the Requisition.



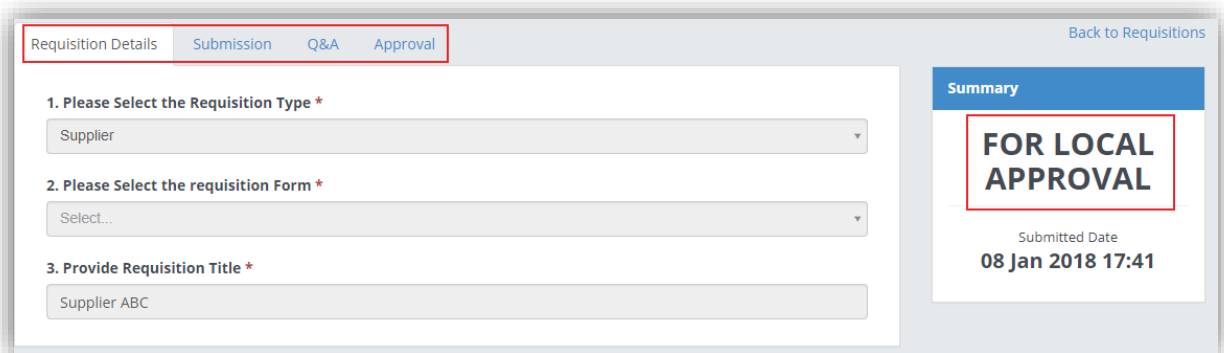
Alternatively, they can login and navigate to the Requisitions area. The Requisitions submitted for approval are displayed in the main requisitions screen.



You can find the Requisitions that are due for approval quickly by filtering the list using the dropdown menu, found when you click on 'All Requisitions', to 'My Approvals' or 'Pending My Approvals'.



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



The Approver can review the information provided by looking in 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

As part of the approval process, the Approver can include a note and any supporting documents to explain how and why they came to that decision.

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 - These comments and attachments may be visible to the Requisitioner depending on your account admin settings)

Happy to approve the spend on this as per monthly review of 21st March 2019. Funds already allocated in budget.

Attach documents

Attach any supporting documents

Sample 38 KB

Copy of Appendix A - Requirements Website RFP.xlsx

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

These comments are visible to the Requisition team in the 'Approval' tab by clicking on the dropdown arrow (1) as seen in the image below.

View Requisition: Legal advice

Requisition Details Submission Q&A **Approval**

Requisition Approval Decision

Approve or Reject this Requisition

Product Details		Requisitioner Details	
Product Name:	Legal advice	Submitted by:	Ronan Heffernan
Quantity:	1		
Unit:	Each		
Total Expected Value:	£ 100		

APPROVER NAME	APPROVER TYPE	DATE APPROVED	DECISION
▼ Ronan Heffernan	Local Approver	10 Apr 2019 12:16	Approved
1	Happy to approve the spend on this as per monthly review of 21st March 2019. Funds already allocated in budget.	Copy of Appendix A - Requirements Website RFP.xlsx	
Sally White	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

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

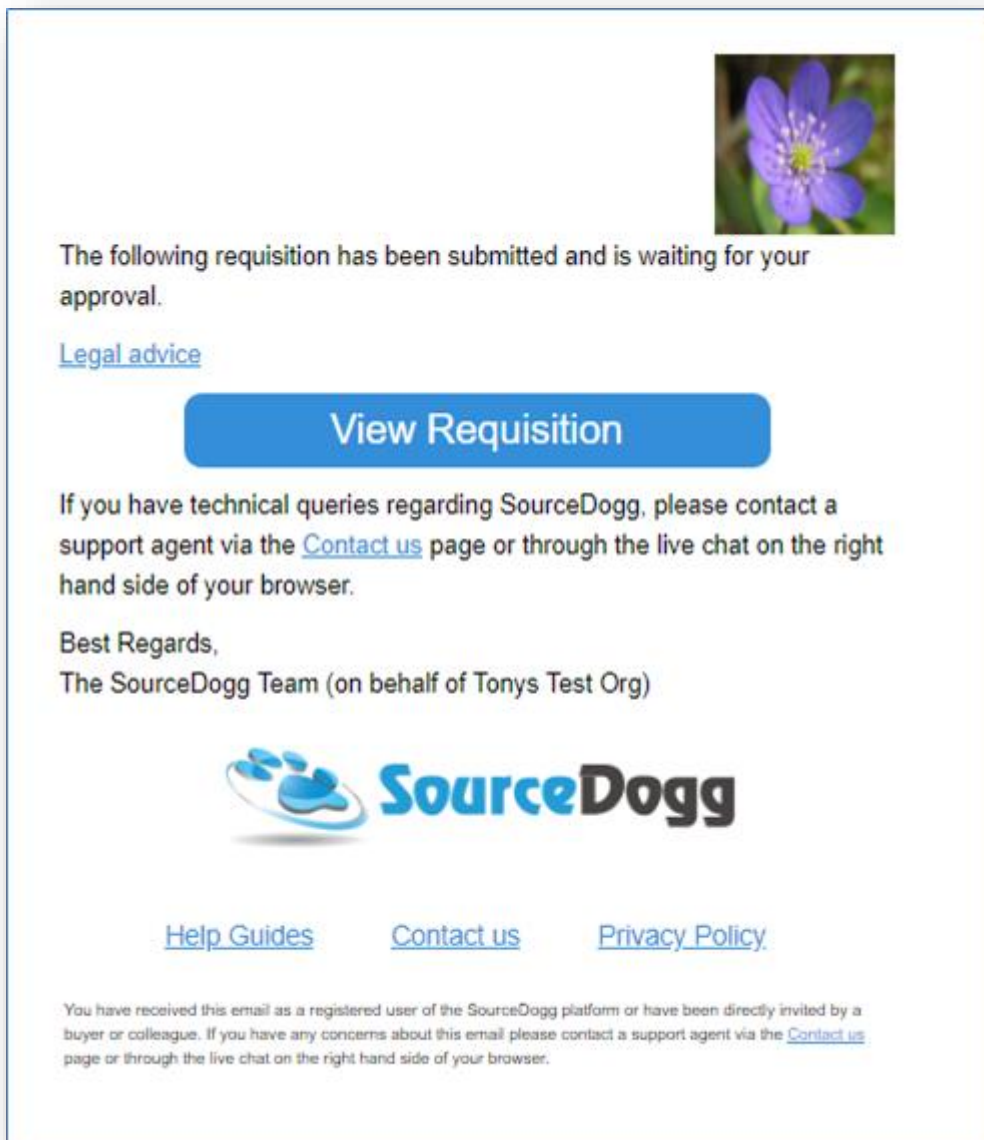
Attach any supporting documents

 placeholder document.txt 0 KB x


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

Head Approval

When the Requisition is approved by the Local Approver(s) the Head Approver will be notified by email. Within the email there is a link which will take them to the Requisition.



The following requisition has been submitted and is waiting for your approval.




[Legal advice](#)

[View Requisition](#)

If you have technical queries regarding SourceDogg, please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

Best Regards,
The SourceDogg Team (on behalf of Tonys Test Org)



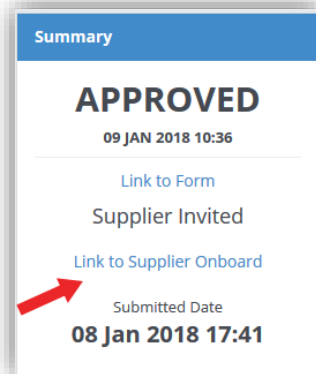
[Help Guides](#) [Contact us](#) [Privacy Policy](#)

You have received this email as a registered user of the SourceDogg platform or have been directly invited by a buyer or colleague. If you have any concerns about this email please contact a support agent via the [Contact us](#) page or through the live chat on the right hand side of your browser.

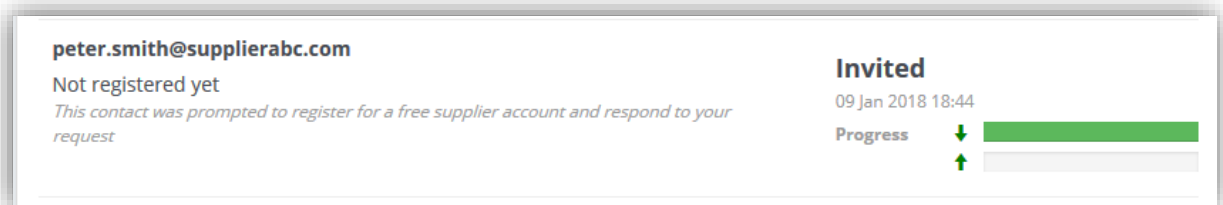
The head approvers can also access the pending Requisitions in the main requisitions screen. In the Approval tab, they are required, just as the Local Approver, to either Approve or Reject the Requisition. They also have the option to leave a comment when approving or rejecting.

Once all the Head Approvers confirm their approval of the Requisition, the details entered by the business user are added 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 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 status of their Requisition.


Requisition Details Submission **Q&A** Approval

Requisition Q&A


Post your question here. All Messages (2) ▾

1  09 Jan 2018 10:51
Dear user, please note your Requisition is approved and supplier was invited.

Caroline Parker


 [Sample Doc](#) 12 KB
SAMPLE DOCUMENT.docx

[Post an answer](#) [Remove](#)

2  09 Jan 2018 11:47
Hi Caroline, thanks. We need urgently on-board the supplier as project is about to start shortly.

Alison Baker

[Post an answer](#)

 **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 ▾