



Business World User Guide

Title	Raising Requisitions
Summary	<p>A requisition is a document that is created by the Requesting Officer and saved on the Business World system. Consider this the part of the process where you get the thumbs up to purchase the goods and services you want. You're not actually ordering anything; you're just getting the approval to do so. Therefore, the requisition is for internal use only and is a method of checking and approval before the purchase order or number of purchase orders are automatically created.</p> <p>In certain circumstances, but not all, the requisition will be sent to the Procurement Service (referred to as the Buying Team in this document) and will always be sent to the Cost Centre approver for action, checking and approval. The Buying Team is responsible for the buying activity (including sourcing appropriate suppliers for your requirement) for any spend above £10,000 that is not based on products from Contracted Suppliers. The Cost Centre authoriser is responsible for agreeing the spending from their budget. In certain circumstances it will also be sent to the Cost Control Panel for further approval.</p> <p>When you raise a requisition, your name will be stamped as the Requesting Officer (or can be known as "Requested by", "Requisitioner"). This means that when the goods and service have been delivered you will receive the invoice from the supplier in your Business World tasks to goods receipt. It is therefore important that after reading this document you also read the guide called "Missing Goods Receipt" which will show you how to action the invoices.</p> <p>Important: Requesting Officers are required to enter one of the following 3 spend justification reasons for ALL Requisitions:</p> <ol style="list-style-type: none"> 1. Legal Requirement 2. Contractual Obligation <p>Section 2 of this guide will show you where this information needs to be entered.</p> <p>This requisition guide will show you how to create a requisition and gives you full details of the process.</p>
Audience	Purchase to Pay Users

Content	<ol style="list-style-type: none">1. Information2. Raising a Purchase Request3. Purchasing Dashboard4. What happens after the requisition has been saved?5. Dealing with rejected requisitions6. Adding attachments7. Amending a rejected requisition8. Closing a rejected requisition9. Amendments to purchase orders10. Setting up a delivery address11. Unable to add cost centre or supplier12. How to approve/reject requisitions (for authorisers)13. Further information
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1. INFORMATION

This guide has been written for users raising a requisition for goods and services on behalf of SCC. Further information can be found by viewing the My Learning Portal and viewing the e-learning modules called Buying for the Council and Requisitions and by viewing the Procurement pages and Business World pages of the intranet.

BENEFITS

One of the key benefits of raising a requisition is that you can enter more than one request/supplier on a single requisition form. The requisition will workflow and obtain any required approval before it is automatically transformed into a purchase order and sent to the relevant supplier.

Where there is a Contracted Supplier or catalogue in place (more on this later), you will select your product and the supplier ID will be populated automatically without the need for the requisition to workflow to the Buying Team.

THE BUYING TEAM— PROCUREMENT TEAM APPROVAL FOR SPEND ABOVE £10K (NOT APPLICABLE FOR SCHOOLS)

If the requisition is over £10,000 aggregated per supplier (and a Contracted Supplier does not exist), your requisition will be routed to the Buying Team who will either obtain quotes for your requirement (or approve the supplier you have selected). Further information is outlined later in this guide.

The requisition will then be routed to the Cost Centre authoriser for approval.

Note: This does not apply to schools. Requisitions raised by school users do not route to the Buying Team but straight to the Cost Centre authoriser for approval.

CATALOGUES AND CONTRACTED SUPPLIERS

Business World contains a number of catalogues or Contracted Suppliers (such as Lyreco and County Supplies) which must be used to buy certain supplies, services or works. If your requirement links to a catalogue or Contracted Supplier then your order will not be routed to the Buying Team and you do not have to submit a Requisition Form (RF) with your requisition.

The supplier ID will also be populated automatically on the line of your requisition when you choose a catalogue product or product which links to a Contracted Supplier.

Please note that activity is ongoing to upload current products (from Contracted Suppliers) into Business World so there may be contracts in existence which do not currently appear as Contracted Suppliers but will over time.

In the interim period, if you know there is a contract in place for your requirement, please select the relevant supplier and make reference to the contract title in the "message" box. The Buying Team will then check the Contracts Register that a contract exists. In these instances, you are not required to complete a Requisition Form.

Over time, suppliers and products will also be cleansed to ensure that only Contracted Suppliers are on the system.

AUTOMATIC CREATION OF PURCHASE ORDERS

Once the requisition has been raised and any approvals have occurred the requisition will be automatically converted into a purchase order or a number of purchase orders, one per supplier.

The purchase orders will be available to view in Business World.

AUTOMATIC EMAILING OF PURCHASE ORDERS

Once the purchase orders are created, they will be emailed automatically to suppliers who we hold a valid email address for. If the supplier does not have an email address, then the purchase order will be emailed to our printing company and printed and posted to the suppliers.

There is also the option to choose to have the purchase order emailed directly to you (the Requesting Officer) but if you choose this method then it is your responsibility to send it out to the supplier. See later in this guide for details.

AMENDMENTS TO PURCHASE ORDERS

You cannot amend your own purchase orders and you cannot amend a requisition once it has been completed. Purchase order amendments can only be completed by schools' users or the finance team and only in certain circumstances. Please see the next section for a step by step guide on how to raise a requisition.

PURCHASES OVER £10,000 FOR NON-CATALOGUE OR PRODUCTS WITHOUT A CONTRACTED SUPPLIER

If you have a requirement which is likely to be between £10,000 and £100,000 in Contract Value and is **not** contained on a current catalogue or does not have a Contracted Supplier, the buying activity (including sourcing appropriate suppliers for your requirement) must be undertaken by the **Buying Team** in accordance with the Contract Procedure Rules (CPRs). You must complete and upload a

Requisition Form setting out your requirement, any key criteria and the required timescales for delivery to your requisition.

For requisitions requiring a **Requisition Form** you must insert supplier ID 222222 on your requisition. Details of how to add an attachment to your requisition can be found in section 7.

Once submitted, the requisition will arrive with Procurement Services (The Buying Team) who will request and receive quotes from suppliers on your behalf. Once received, the quotes will be returned to you for evaluation. .

The Requisition Form, CPR and further guidance on buying processes are available on the Procurement services page on the Intranet:

<https://staffinfo.southampton.gov.uk/finance-procurement/procurement/default.aspx>

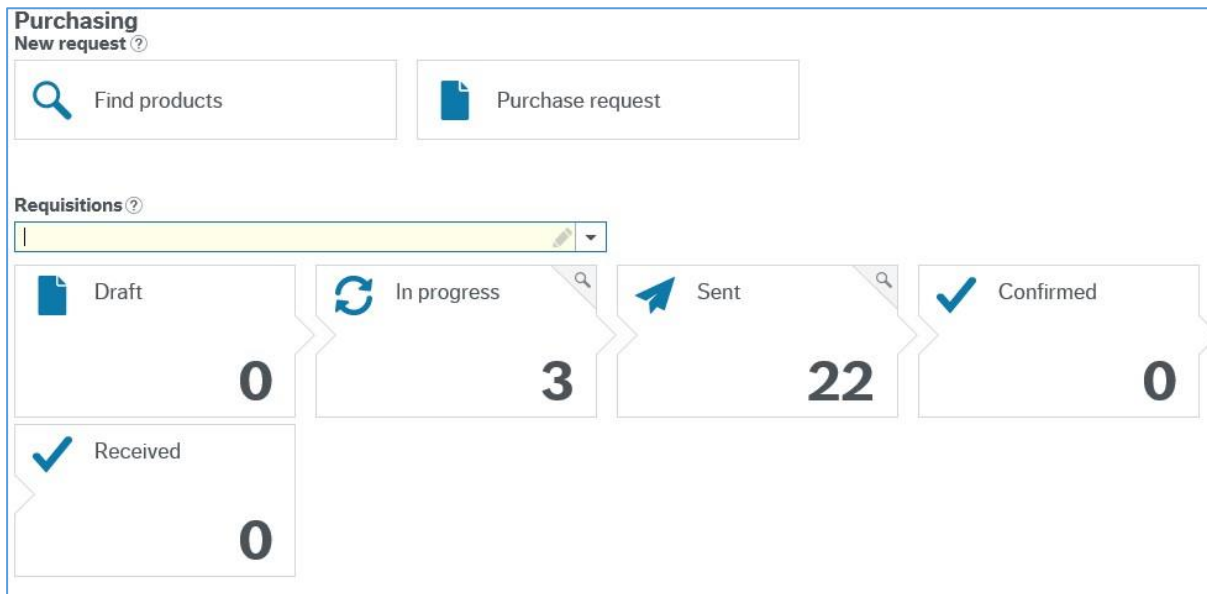
The Buying Team can also be contacted on procurement@southampton.gov.uk or 023 8083 3888 for assistance.

2. RAISING A PURCHASE REQUEST

2.1. From the Business World menu select **Your Employment – Purchasing**

Menu	
Start pages	Your employment
<ul style="list-style-type: none"> Expenses Time Off Purchasing 	<ul style="list-style-type: none"> Personnel information Time Off Activate your substitutes My Team's Absence
Reports	Your activities
<ul style="list-style-type: none"> Create new report Shared Private 	<ul style="list-style-type: none"> Timesheets - standard Requisitions - standard Your purchases

The following window will be displayed. Here You will be able to see all requisitions you have sent and are in progress.



2.2. Select **Purchase Request** and the window below will open:

Your name will populate here.

If you are raising the requisitions on someone else's behalf, you can add their name here. It is free text box.

Purchase request

On behalf of Requisitioner* Resource, Dummy | Purchase request name Add a name to this purchase request

Add delivery group ? | Message | Delivery date 23/02/2022 | Apply to selection | Apply to all | Header ?

Delivery to

Delivery contact* Mark Ratkai (Delivery) | Delivery address OGS Southampton SO14 7DU

Delivery description | Delivery attention | Delivery information

Product	Product description	Supplier	Deliver...	Quantit...	Unit	Price	Currency	Curren...	Account	Cost C...	Cat2	Cat3	Cat4	Cat5	Cat6	Cat7	Tax code	Tax sys...
Click Add product to start entering your purchase request.																		

Add product | Delete product | Copy product | Move selection here | More product information | Total amount: GBP 0.00

Total amount: GBP 0.00

2.3. Requisitioners are now required to enter one of the following 2 spend justification reasons for

ALL Requisitions:

1. **Legal Requirement**
2. **Contractual Obligation**

This should be entered in the 'Message' field, shown in the screenshot below.

Please note:

That this will not print out on the Purchase Order and is for internal use only. If you raise Requisitions on behalf of others, then you will need to know the spend justification reason before you can proceed.

Note: Failing to add a justification will result in the requisition being returned to your Tasks.

2.4. Click on **Header** in the top right corner (highlighted in yellow below)

2.5. The following pop-up window will open where you can set some defaults if you want to:

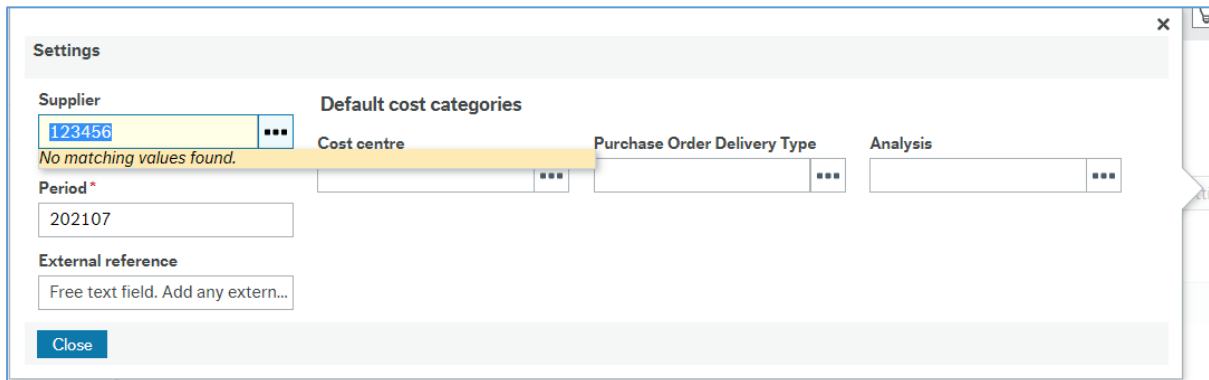
Note: Whatever you enter here will be copied down to each line of your requisition (but you can overwrite the details). These defaults are only for this requisition.

If you are entering a work order number for your requisition, please do not complete the cost centre field in this settings box or it will cause an error message on your requisition.

If this requisition is for the same **Supplier** and **Cost Centre**, you can enter the details here. Alternatively, you can leave this blank and enter later.

You can choose to have the purchase order sent to you, rather than direct to the supplier. This is done by entering the word **USER** in the **Purchase Order Delivery Type** field. If you want to send it direct to the supplier enter **SUPP** in this field.

If the supplier, you are searching for cannot be found and shows this message:



The screenshot shows a 'Settings' dialog box with the following fields and values:

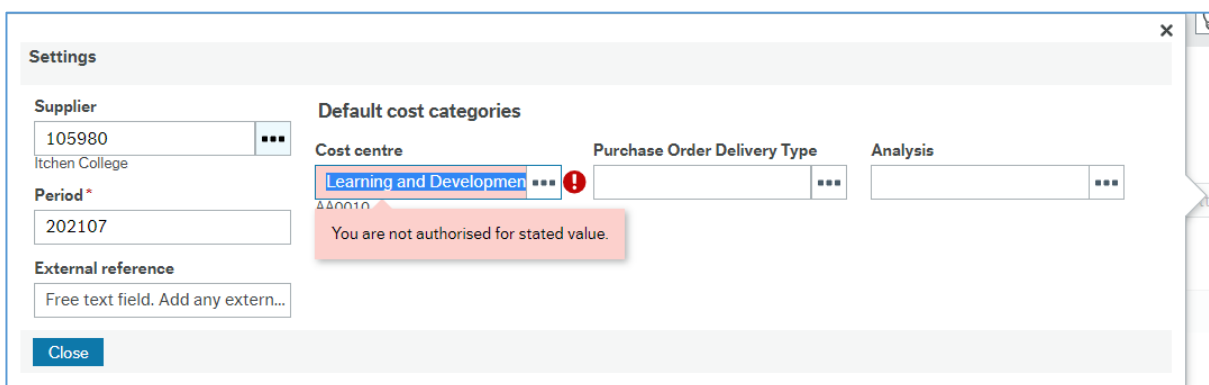
- Supplier:** 123456 (highlighted in yellow). Below it, the text "No matching values found." is displayed.
- Default cost categories:**
 - Cost centre:** (empty)
 - Purchase Order Delivery Type:** (empty)
 - Analysis:** (empty)
- Period*:** 202107
- External reference:** Free text field. Add any extern...

A blue 'Close' button is located at the bottom left of the dialog box.

Please go to section 10

If this error pops up when adding a cost centre then you do not have access to this Cost Centre.

Please see section 10



The screenshot shows a 'Settings' dialog box with the following fields and values:

- Supplier:** 105980 (Itchen College)
- Default cost categories:**
 - Cost centre:** Learning and Development (highlighted in blue). A red error message box is overlaid on this field: "You are not authorised for stated value."
 - Purchase Order Delivery Type:** (empty)
 - Analysis:** (empty)
- Period*:** 202107
- External reference:** Free text field. Add any extern...

A blue 'Close' button is located at the bottom left of the dialog box.

2.4. Once you have set up your defaults you can click the **Close** button, and this will return you to the **Purchase Request** window where you can continue.

2.5. The next thing you will need to do is to select your **Delivery Address**. This is the address that your goods will be delivered to. Delivery addresses can be selected from the drop-down.

Note: If this is the first time you have raised a requisition, you may need to set up your delivery address. This is done in a different part of the system – see section 9. Once set up it will be available from the drop-down list as shown below.

2.6. Once your delivery address is populated move down the window and select **Add Product:**

Once selected the screen will look similar to this:

Start typing the product code or description of the product you require or use the search.

Note: If you are raising a requisition line for a service then enter a product starting with a **V** or if for actual items of goods then enter a product code starting with a **Q**. See below for examples.

Value Bases Product Codes (example)

To be used when raising a requisition:

For service(s)

Where you don't know how many invoices will be received

Where you don't know the value of the invoices that will be received

The invoices can be paid based on the value (net) of the invoice

[Quantity Based Product Codes \(example\)](#)

To be used when raising a requisition:

For actual items e.g. pens, paper, chairs

The invoices can be paid based on the quantity of items delivered

[Catalogue and Contract Items](#)

There are some actual products available to select. When you choose any of these codes the supplier and the price will be populated automatically

Lyreco Prefixed with LY e.g. LY123456

County Suppliers prefixed with CS e.g. CS123456

Shred station


2.7. If required change the quantity of the products, you are ordering as this will default in as 1 for

Product	Product description	Supplier	Delivery ...	Quantity	Unit	Price	Currency	Currency...	Account	Cost cen...	Cat2	Cat3	Cat4	Analysis	Labour o...	Legal ent...	Tax code	Tax syst...
CS1...	Floor cloth, heavy duty...	Cou... 108329	24/...	5	Units UN	0.74	Sterl...	GBP	3.70	A27020	AA0010				NA	SO	P1	NA

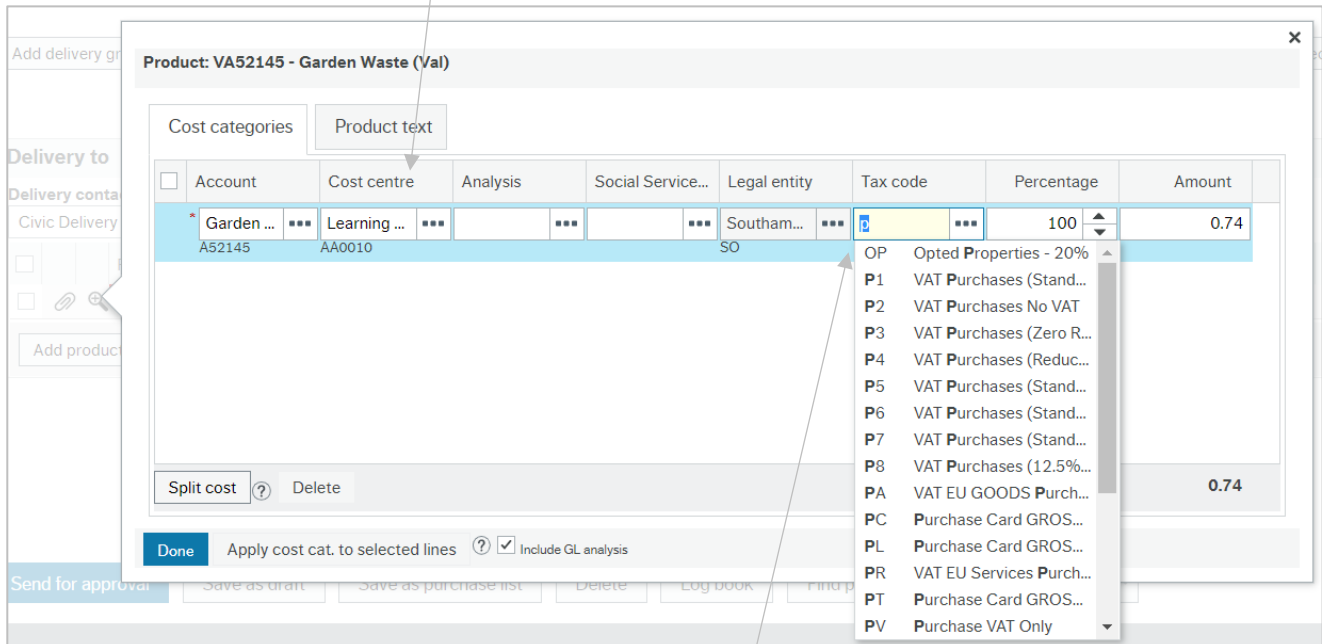
Buttons: Add product, Delete product, Copy product, Move selection here, More product information

Total amount: GBP 3.70

initially for Quantity based items.

2.8. On the left of the row select  and a pop-up box will appear like in the example below. If you entered the **Cost Centre** in the **Settings** box, then you will see it populated here. If you didn't then you will need to enter the **Cost Centre** here. This is where you should also check and amend the **Tax code** too.

Enter the Cost Centre if not already populated.




Account	Cost centre	Analysis	Social Service...	Legal entity	Tax code	Percentage	Amount
* Garden ... A52145	Learning ... AA0010			Southam... SO		100	0.74

OP Opted Properties - 20%
P1 VAT Purchases (Stand...
P2 VAT Purchases No VAT
P3 VAT Purchases (Zero R...
P4 VAT Purchases (Reduc...
P5 VAT Purchases (Stand...
P6 VAT Purchases (Stand...
P7 VAT Purchases (Stand...
P8 VAT Purchases (12.5...
PA VAT EU GOODS Purch...
PC Purchase Card GROS...
PL Purchase Card GROS...
PR VAT EU Services Purch...
PT Purchase Card GROS...
PV Purchase VAT Only

Enter P for the purchase tax code and select the correct one for your purchase from the dropdown list. This will usually be P1 for 20% VAT or P2 for No VAT

Note: If other Coding is required e.g. **SSClient**, **Workorder**, **Analysis**, the coding fields will be available for you to populate.

2.9. Once all is completed, click **Done**. This will take you back the **Purchase request** window. If you have further lines to add then follow the process as above.

2.10. If the requisition is complete, select . Your requisition will now be sent on in the workflow.

Note: If you want to hold your requisition and not send it for approval, you can click the button

Save as draft

instead of the **“Send for approval”**. The requisition will be saved but not sent for approval. You can recall it to send it for approval later.

You will be returned to the **Purchasing Dashboard** where you can check the progress of your purchasing requisition: See next section.

3. PURCHASING DASHBOARD

Once you have saved your requisition you will be returned to this dashboard and your requisition will be shown as a number in the button **“In progress”**. You can click on this button to see the number of requisitions you have that are progress and drill down to the requisition and workflow from here.

The screenshot shows the Purchasing Dashboard interface. At the top, there are two search boxes: "Find products" and "Purchase request". Below this is a "Requisitions" section with a search bar and five status buttons: "Draft" (count 1), "In progress" (count 0), "Sent" (count 0), "Confirmed" (count 0), and "Received" (count 0). At the bottom, there is an "Expected deliveries" calendar for January 2022, with the date 24 highlighted.

The meaning of the buttons is listed below:

Draft	Raised but not submitted
In Progress	Submitted

Sent	Approved and Sent (printed or emailed) Note: temporarily disappears from the screen when PO19 converts to PO and reappears after printing
Confirmed	Used when supplier confirms order (so not really used here)
Received	When GRN completed (can drill down to order from here)

4. WHAT HAPPENS AFTER THE REQUISITION HAS BEEN SAVED?

Once your requisition is complete there are a number of options for what happens to it next, and these are listed below:

- If the requisition has been raised by a school user, it will be routed in workflow to the Cost Centre approver who is responsible for authorising that value.
- If it is a non-schools requisition and is between £500 and £10,000 per supplier, it will be routed to the Cost Centre approver responsible for authorising that value and after it has been approved it will be sent to the Cost Control Panel unless exempt. Details of the exemptions can be found on the intranet page here: [Cost Control Panel \(southampton.gov.uk\)](http://southampton.gov.uk/cost-control-panel) or you can email the team at cost.control@southampton.gov.uk

If it is a non-schools requisition, where the value per supplier is over £10,000 it will be routed to the Buying team (unless it is for a catalogue or item from a Contracted Supplier). Once it has been processed by the Buying team, it will be routed to the Cost Centre approver.

Sending to the supplier

- When all required approval has taken place the requisition will automatically be converted to a purchase order or a number of purchase orders and sent to the supplier(s) or yourself (depending on what option you chose in the “**Settings**” button on the Purchase Request) by email the same day (unless we don’t hold a valid email address, in which case it will be posted out the next day).

Actions for the Buying team and Cost Centre Approver, Cost Control Panel

There are several actions that the Buying team and/or the cost centre approver can take regarding the requisition which are listed below:

- Approve it
- Reject it back to you (the Requesting Officer) to either request more information, request that you add some documentation or close it

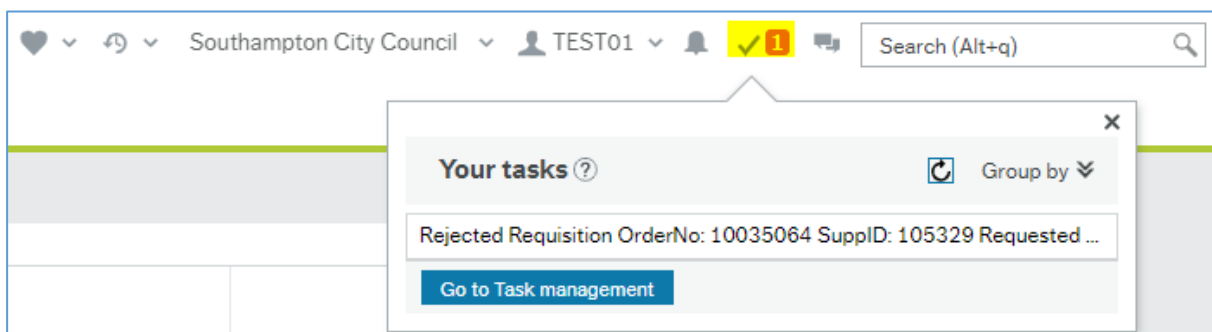
Note: Remember to check your Business World Tasks regularly for any documents that may have been returned to you – see section 5 for how to deal with rejected items.

5. DEALING WITH REJECTED REQUISITIONS

As mentioned in the introduction, some items might be returned to you from the Buying team or by the Cost Centre approver requesting more information, documentation or just asking you to close the requisition. This section will show you how to deal with these items.

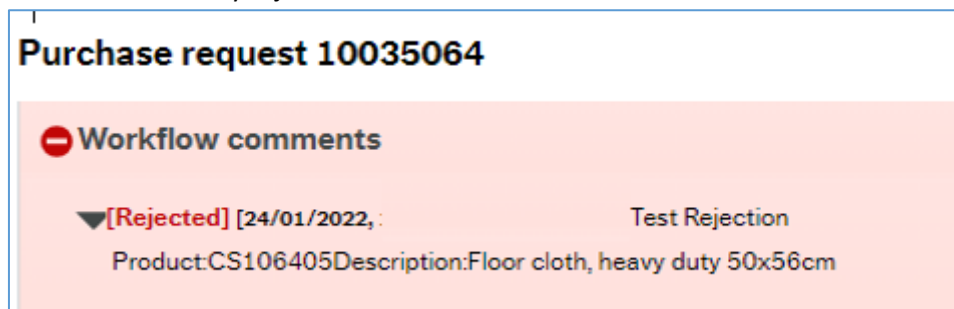
Any rejected workflow tasks that you are required to do are found in the **Tasks** button in the top right of your screen. It will show a number in orange if there is something to do.

5.1. To access **Tasks**, click on the orange tick shown in the top - a **Your tasks** pop-up will appear.

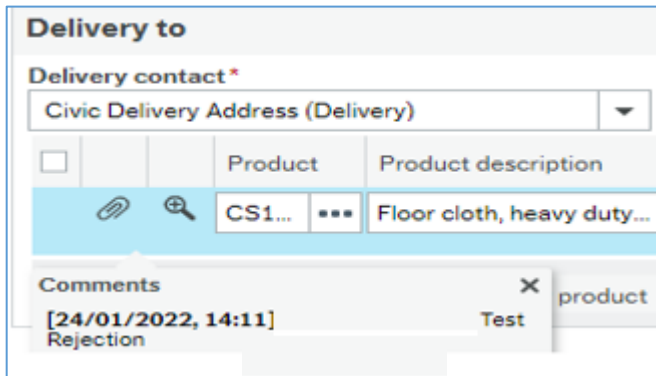


5.2. You can now either click on **Go to Task management** and select the task there OR click directly on the task in the pop-up. It will take you to the **Purchase Request** page.

5.3. At the top of the screen there will be a **Workflow Comments** section in red. Here will be the details of the action (rejected) by whom, when and their comment on what action to take as well as the line they rejected.



5.4. You can also find this information if you click directly on the purchase line. If you have more than one line, you may have to click on each row in turn until the message appears.

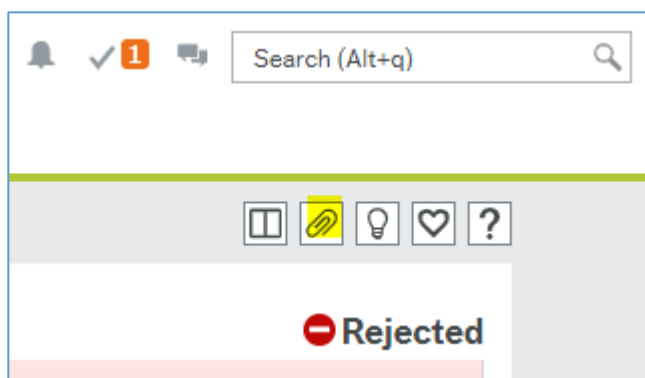


5.5. The actions you will need to take are listed below. See the relevant sections of this guide for what to do:

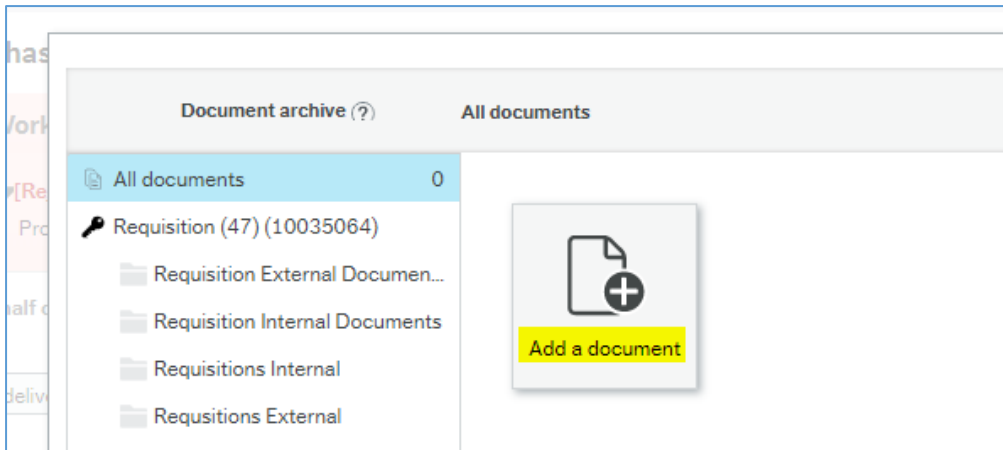
Adding attachments	See section 6
Amending a rejected requisition	See section 7
Closing a requisition	See section 8

6. ADDING ATTACHMENTS

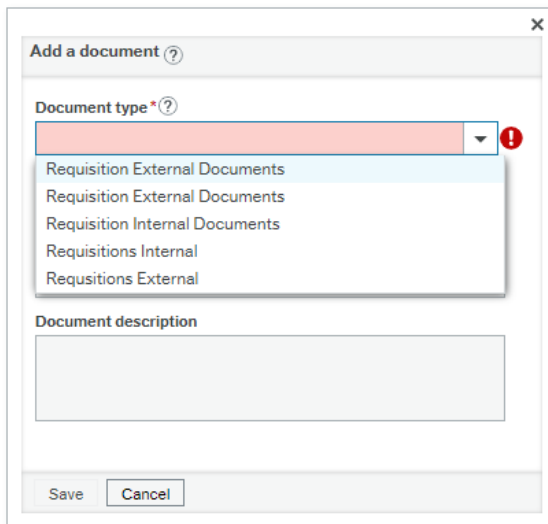
- 6.1. To add an attachment to your requisition, from the **Purchase Request** window (which is where your requisition has been rejected to).
- 6.2. Click on the **paperclip icon** in the top right hand of the page, under the search bar. (This can also be used to view documents)



6.3. Click on **Add a Document**

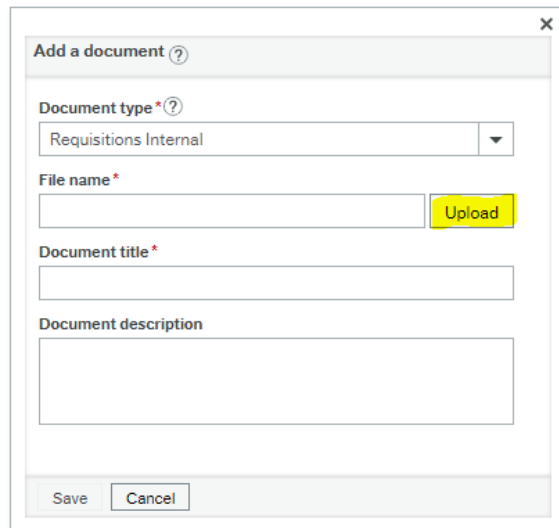


6.4. Select the Documents type (this is just what folder it will be held in).



6.5. Click upload

Note: Any emails that need to be uploaded against the requisition should be saved to your network drive as a .txt file.

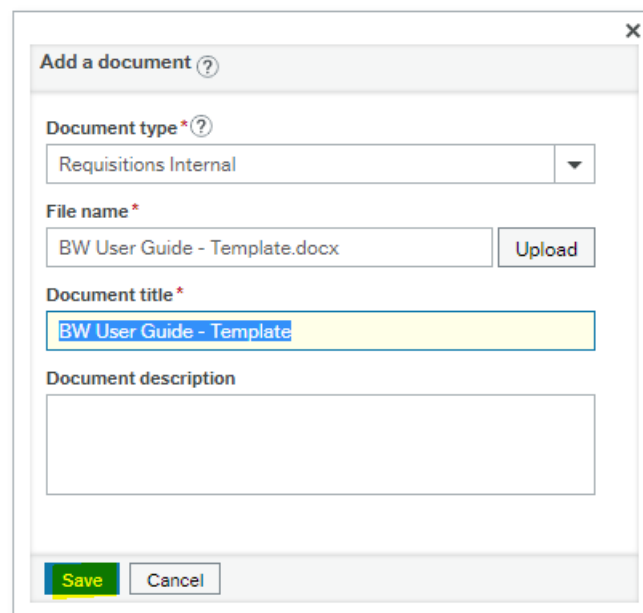


The screenshot shows a dialog box titled "Add a document" with a close button (X) in the top right corner. The dialog contains the following fields and buttons:

- Document type* (?)**: A dropdown menu currently showing "Requisitions Internal".
- File name***: An empty text input field. To its right is a yellow "Upload" button.
- Document title***: An empty text input field.
- Document description**: A larger empty text area.
- At the bottom, there are "Save" and "Cancel" buttons.

And select the document you want to upload and click **Upload**.

- 6.6. Now click **Save** and the document will be attached to the requisition. You can save multiple files against a requisition if required.



This screenshot shows the same "Add a document" dialog box, but with the following changes:

- The **File name*** field now contains the text "BW User Guide - Template.docx".
- The **Document title*** field now contains the text "BW User Guide - Template".
- The **Upload** button is now a standard grey button.
- The **Save** button at the bottom is now highlighted in green.

- 6.7. You can close out of the window and click **Send For Approval** to send it back to the authoriser or Buying team.

7. AMENDING A REJECTED REQUISITION

If you have been asked to amend a requisition, you will need to check the **Workflow comments** (section 5) to see what you need to amend. It could be any of the following:

- Cost centre
- Change tax code
- Add additional coding
- Entering some text for the reason the purchase is required
- Change the product
- Delete a line

Note: The above is not an exhaustive list. If any other changes are requested that are not listed and you don't know how to do it, please contact Business World Support.

7.1. To change the cost centre/add additional coding/change tax code

Account	Cost centre	Analysis	Labour or Mat...	Legal entity	Tax code	Percentage	Amount
* Cleanin... A27020	Business ... AB0025	...	Not Appli... NA	Southam... SO	VAT Purc... P1	100	0.74
						100.00	0.74

You will need to establish which line you need to change the coding on (if you have more than one).

Select the **Additional Information** button (magnifier)

You will be able to change the cost centre, tax code or add additional coding that is requested here. (in this example I changed the Cost Centre). You can just type over what is in the box to change it.

Note: If you are unsure where to add additional coding then contact the Business World Support team by email BW.support@southampton.gov.uk

When you have completed your changes, click on the **Send For Approval** button to send the requisition back to the Buying team or the Cost Centre approver and then X out of the window.

7.2. Entering Text

If you need to enter text, there are 2 places you can add this.

Product description text:

To enter text on the product description you can select the **Product Description** box and start typing at the end.

The screenshot shows a window titled "Delivery to". At the top, there are fields for "Delivery contact*" (Southampton City Council (General)) and "Delivery address" (Civic Centre Civic Centre Road Southampton United Kingdom SO14 7LY). Below this is a table with columns: Product, Product description, Su..., Delivery..., Quantit..., Unit, Price, Currency, Currenc..., Account, and Cost ce... The first row of the table contains: VA..., ment Advertising (Val) test, 105980, 31/..., 1, Units, 0.00, Ste..., 0.00, A17000, AA0050. At the bottom of the window are buttons: Add product, Delete product, Copy product, Move selection here, and More product information.

Product Text:

To add more text, click on the magnified glass

This screenshot is similar to the previous one but highlights the magnifying glass icon in the "Product" column of the table. The "Product" column contains "VA..." and the "Product description" column contains "Recruitment Advertising ...". The buttons at the bottom are "Add product", "Delete product", and "Copy product".

Select **Product Text** and type in the text box.

The screenshot shows a dialog box titled "Product: VA17000 - Recruitment Advertising (Val) test". It has two tabs: "Cost categories" and "Product text". The "Product text" tab is active, showing a large text area with the word "test" entered. At the bottom, there are buttons: "Done", "Apply cost cat. to selected lines", and a checked checkbox for "Include GL analysis".

When the Purchase Order is printed, this is where the text shows:

Text entered in the Product Description will show here.

Product Ref	Description	Quantity	Unit	Price	Total Cost £
VA17000	Recruitment Advertising (Val) test test	1.00	UN	30.00	30.00
VA20000	Repairs & Maintenance (Val)	1.00	UN	10.00	10.00

Text entered in the Product Text will show underneath.

7.3. Change product

To change the product, delete what is in the product tab and type the correct product.

Delivery to

Delivery contact* Civic Delivery Address (Delivery) Delivery address The Civic Centre Civic Centre Road Southampton SO14 7LY

Product	Product description	Supplier	Delivery ...	Quantity	Unit	Price	Currency
Product	Childrens yellow hi-vis ...	Cou... 105329	24/...	1	Units	2.13	Sterl... GBP

Add product Delete product Copy product Move selection here More product information

Once changed, click on the **Send For Approval** button to send the requisition back to the Buying team or the Cost Centre approver and then X out of the window.

7.4. Delete a line

Delivery to

Delivery contact* Civic Delivery Address (Delivery) Delivery address The Civic Centre Civic Centre Road Southampton SO14 7LY

Product	Product description	Supplier	Delivery ...	Quantity	Unit	Price	Currency	Currency...	Account	Cost cen...
CS1...	Whistle, Acme moule...	Cou... 105329	24/...	1	Units	1.48	Sterl... GBP	1.48	A42000	AA0010
CS1091...	Feather Flick Duster, 2...	County S...	24/01/2...	1.00	Units	1.69	Sterling ...	1.69	A27020	AA0010

Add product Delete product Copy product Move selection here More product information

You may have more than one line and need to delete one. If so, click on the line above or below the one you want to delete. You will see a white box appear next to the paperclip on the line you want deleting.
 (in this example I want to delete the bottom line, so I have clicked on the top line and the white box has appeared next to the paperclip on the bottom)

Select the white box so a tick appears and click **Delete Product**.

Click **OK** on the pop-up box. Repeat this if other lines need deleting.

You can now click on the **Send For Approval** button to send the requisition back to the Buying team or the Cost Centre approver and then X out of the window.

8. CLOSING A REJECTED REQUISITION

If you have been asked to close a requisition you will need to check the **Workflow log** to see which line(s) to close, if your requisition is to more than one supplier.

Open Requisition standard from **Procurement>Requisition – standard**

Delivery to

Delivery contact*
Civic Delivery Address (Delivery)

Delivery address
The Civic Centre Civic Centre Road Southampton SO14 7LY

	Product	Product description	Supplier	Delivery ...	Quantity	Unit	Price	Currency	Currency...	Account	Cost cen...
<input type="checkbox"/>	CS1...	Whistle, Acme moule...	Cou... 105329	24/...	1	Units	1.48	Sterl...	1.48	A42000	AA0010
<input checked="" type="checkbox"/>	CS1091...	Feather Flick Duster, 2...	County S...	24/01/2...	1.00	Units	1.69	Sterling ...	1.69	A27020	AA0010

Buttons: Add product, Delete product, Copy product, Move selection here, More product information

Click your cursor in the box of the relevant line(s) in the Requisition details section:

Requisition details

<input type="checkbox"/>	#	Product	Description	Unit	Supplier
<input checked="" type="checkbox"/>	1	LY101679 LYRECO HP C3903A COM...	Hire of a car	EA	102384 Lyreco UK Ltd
<input type="checkbox"/>	2	QA40010	Harry Potter...	UN	134990
<input type="checkbox"/>	3	QA16000	Business Wo...	UN	100116
<input type="checkbox"/>	4				

Buttons: Add, Delete, Copy, Reset, Park, Close, Search kits, Kit components

Click here

Product	Description	Unit	Supplier	Delivery date	Quantity	Currency	Price	Amount	Status
LY101679	Hire of a car	EA	102364	8/08/2019	0.00	GBP	20.15	0.00	Closed
QA40010	Harry Potter The Goblet of Fire...	UN	134990	8/08/2019	1,000.00	GBP	10.00	10,000.00	Active
QA16000	Business World books and pulic...	UN	100116	8/08/2019	10.00	GBP	550.00	5,500.00	Active

Check the status shows as closed here

When you have completed your changes, click on the **Save** button. The requisition line(s) will now be closed and will not be converted to a purchase order.

9. SETTING UP A DELIVERY ADDRESS

Prior to raising your first requisition, you will need to make sure that a delivery address has been attached to you. If you raise requisitions for more than one delivery address, this isn't a problem, additional address can be added to the same place. Once added, when in the **Purchase request** screen, it will default in the first address on your list, but you will have the ability to choose any other address you have added.

10.1. From the Business World menu select **Your Employment - Personnel Information**

10.2. Select **Contact Information** tab and then **Add** under Address.

10.3. You will see a box generate and **Address Details** underneath that you can fill out.

The screenshot shows the 'Address' form with the following sections:

- Address type:** A table with columns 'Address type', 'Street address', and 'Postcode'. A row is highlighted with 'Delivery', 'The Civic Centre Civic Centre Road', and 'SO14 7LY'. Below are 'Add' and 'Delete' buttons.
- Address details:** A form with fields for:
 - Address type*:** A dropdown menu set to 'Delivery'.
 - Contact:** A text field containing 'Civic Delivery Address'.
 - Street address:** A text field containing 'The Civic Centre Civic Centre Road'.
 - Country*:** A dropdown menu set to 'United Kingdom'.
 - Postcode:** A text field containing 'SO14 7LY'.
 - Town:** A text field containing 'Southampton'.
 - County:** An empty text field.
- Phone numbers:** Fields for 'Telephone', 'Mobile', and 'Home'.
- Email:** A field for 'E-mail'.

Callout boxes provide instructions:

- Make sure the Address Type is changed to Delivery.** (Points to the 'Address type*' dropdown)
- In Contact, enter text that will enable you to identify this address. (e.g.) Civic Delivery address** (Points to the 'Contact' field)
- Within Street Address, press Enter to move down to next line.** (Points to the 'Street address' field)
- Make sure your email is added.** (Points to the 'E-mail' field)

10.4. Once completed click **Save** and then the **OK** button. Your delivery address will now be available to select in the **Purchase request** window. You can add as many delivery addresses as required.

When you want to create a requisition from the **Purchase request** window your delivery address will be available in the drop down.

The screenshot shows the 'Purchase request' form with the following sections:

- On behalf of Requisitioner*:** A dropdown menu set to 'Test'.
- Purchase request name:** A text field.
- Add delivery group:** A button with a help icon.
- Message:** A text area.
- Delivery to:** A section with:
 - Delivery contact*:** A dropdown menu set to 'Civic Delivery Address (Delivery)'.
 - Delivery address:** A text field containing 'The Civic Centre Civic Centre Road Southampton SO14 7LY'.
 - Delivery description:** A text area.
 - Delivery attention:** A text area.
- Table:** A table with columns: Product, Product description, Supplier, Delivery ..., Quantity, Unit, Price.
- Buttons:** 'Add product', 'Delete product', 'Copy product', 'Move selection here', 'More product information'.

Callout box: **Your delivery address will be shown here. What is shown in the Delivery contract dropdown is what you entered in the contact field in the personnel window above. It should help you select the correct address for your purchase request.** (Points to the 'Delivery contact*' dropdown)

10. TROUBLE SHOOTING - UNABLE TO ADD A COST CENTRE OR SUPPLIER

Cost Centres:

You need to ensure you have access to the cost centre required for your requisition otherwise you will not be able to raise the requisition to it. Please gain authorisation from your finance business partner if you find you cannot enter your cost centre. Once approval has been granted then please email this to BW.help@southampton.gov.uk who will be able to change your access.

Suppliers:

If the supplier you are trying to attach does not show it could be for 1 of 3 reasons.

1, the supplier setup hasn't yet been completed and is currently sitting with the Creditors team. You can email them (creditor.paymentsteam@southampton.gov.uk) to check the supplier has been set up and is with them.

2, the supplier number is wrong.

3, the supplier hasn't been created. If this is the case, please see the user guide "Setting up a new supplier" which is available on the intranet page under Business World for how to create a supplier.

FURTHER INFORMATION

If you have any further questions, please do not hesitate to contact the Business World inbox at BW.help@southampton.gov.uk.

Please note that once the requisition has been approved, transferred to a purchase order and sent to the supplier, then following receipt of the goods or services an invoice will be received for payment. You will receive the invoice as a **Missing Goods Receipt** task in due course. You will need to action the goods receipt note to confirm that you have received the goods or service before the invoice can be forwarded on for payment. Please read the guidance "Missing Goods Receipt" which is found on the intranet page under the Business World section for further details.