Introduction
There are two ways to raise requisitions to trade suppliers in Business World:

<table>
<thead>
<tr>
<th>Method</th>
<th>Used to order....</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Free text requisition</td>
<td>• Products from suppliers that do not have online catalogues.</td>
</tr>
<tr>
<td></td>
<td>• Products from suppliers whose online catalogues are not available via the e-marketplace (Proactis), or with whom Birkbeck does NOT have an eprocurement contract.</td>
</tr>
<tr>
<td></td>
<td>• Services (e.g. consultancy, plumbing).</td>
</tr>
<tr>
<td>B. Catalogue requisition</td>
<td>• Products from supplier’s whose online catalogues are available via the e-marketplace (Proactis), and with whom Birkbeck has an e-procurement contract e.g. Office Depot.</td>
</tr>
</tbody>
</table>

This guide explains how to:
A. Raise a free text requisition for goods
B. Raise a catalogue requisition

Audience
All staff responsible for purchasing goods and services from trade suppliers.

Workflow
Here is the basic workflow for creating a requisition:

Requisition number
c.e.g. 5000391

Requisitioner
• Creates requisition in Business World

Checker
• Checks requisition (if value >£25K)

Approver
• Approves requisition

PO number
c.e.g. 8000336

Purchase order auto-generated and sent to supplier

⚠️ Do NOT create a requisition retrospectively for an invoice that has already been received. Invoices should be sent directly to Payments@bbk.ac.uk for registration and processing.

ℹ️ It is not possible to save requisitions in draft so you will need to raise your requisition in one go. Bear in mind the system will time you out after 45 minutes of inactivity.

A. Raise a free text requisition for goods

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the main menu select Procurement then Requisitions→ Requisitions → Marketplace.</td>
</tr>
</tbody>
</table>
Do NOT use **Requisitions – Internal**. Always use **Requisitions – Marketplace**, even when you are ordering something on behalf of another department.

2. Complete the **Requisition entry** tab:
   a. **Internal message** – comment for the Checker/Approver
   b. **Req-asset** – is requisition asset-related (y/n)? Note: an asset is defined as a physical item which costs more than £1000 each and will be used for more than one year.
   c. **Subproj** – subproject to which purchase will be charged. If you are ordering on behalf of another department, enter their subproject here. Note: You may need to submit an access request via ASK to be able to charge to subprojects outside your own department.
   d. **Send** – send PO to supplier (y/n)? Defaults to Y (Yes - Send PO)
   e. **Delivery date** – use calendar to enter the date. For goods/services delivered in batches enter the delivery date of the final batch.
   f. **Delivery contact** – address
   g. **Delivery attention** – name of the recipient and their location

3. Click **Go shopping**. This takes you to the **Supplier Directory** page in Proactis.

If nothing happens when you click **Go shopping**, you need to enable popups in your browser e.g. in Chrome click the icon in the address bar then select ‘Always allow pop-ups from....[this site]’

4. Browse or search to select the supplier from the list.

5. Click the shopping trolley to go shopping.
6. Enter the order details, one item per line

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Net price</th>
<th>Qty</th>
<th>Unit of Issue</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tables</td>
<td>Starlab (UK) Ltd (non-catalogue)</td>
<td>£65</td>
<td>5</td>
<td>each</td>
<td>£375.00</td>
</tr>
<tr>
<td>Chairs</td>
<td></td>
<td>£25</td>
<td>5</td>
<td>each</td>
<td></td>
</tr>
</tbody>
</table>

- **Item description** - as given in the description in the supplier catalogue
- **Net price** – ensure you enter the net price. Tax is added automatically depending on the tax code applied within Business World.
- **UOI** – unit of issue, enter ‘each’.

7. Where relevant, click the twisty on the left of the line to add more detail.

OEM = original equipment manufacturer

8. Click **Update basket**. A success message is displayed.

9. Click **Checkout**. This takes you to the **Category Coding** screen.

10. Click **Assign codes** to assign the relevant UNSPSC category codes.

<table>
<thead>
<tr>
<th>UNSPSC code and category description</th>
<th>Price</th>
<th>Qty</th>
<th>Net value</th>
<th>Assign codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>£50.00</td>
<td>5</td>
<td>£250.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>£25.00</td>
<td>5</td>
<td>£125.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

UNSPSC (United Nations Standard Products and Services Code) is a global classification system for products and services. UNSPSC codes are mapped to the product codes in BW, which in turn are mapped to the account codes.

11. In the **Level** boxes at the top, select the most appropriate categories down to the lowest level (Level 2 in the example shown).
12. Click **Assign** to assign the code to individual items, or **Assign all** to apply the same code to all items in your order. To amend the code on a line, select a different UNSPC code and click **Change**.

<table>
<thead>
<tr>
<th>UNSPSC code and category description</th>
<th>Price</th>
<th>Qty</th>
<th>Net value</th>
</tr>
</thead>
<tbody>
<tr>
<td>56100000 Accommodation furniture</td>
<td>£50.00</td>
<td>5</td>
<td>£250.00</td>
</tr>
<tr>
<td>56100000 Accommodation furniture</td>
<td>£25.00</td>
<td>5</td>
<td>£125.00</td>
</tr>
</tbody>
</table>

If the product or account coding does not seem appropriate, please submit an ASK query to the Procurement Team who will review and amend accordingly.

13. Click **Continue**. This takes you back to Business World.

14. Click **Generate to requisition**.

15. Complete the **Requisition details** tab.

The **Requisition details** section is autopopulated:

<table>
<thead>
<tr>
<th>Requisition details</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
</tr>
<tr>
<td>Funds check</td>
</tr>
<tr>
<td>Account</td>
</tr>
<tr>
<td>Costs</td>
</tr>
<tr>
<td>Project</td>
</tr>
<tr>
<td>Subproj</td>
</tr>
<tr>
<td>Unit</td>
</tr>
<tr>
<td>Supplier</td>
</tr>
<tr>
<td>Delivery date</td>
</tr>
<tr>
<td>Quantity</td>
</tr>
<tr>
<td>Currency</td>
</tr>
<tr>
<td>Price</td>
</tr>
<tr>
<td>Amount</td>
</tr>
<tr>
<td>Status</td>
</tr>
</tbody>
</table>

16. **For each line** in the **Requisition details** section, click anywhere on the line to display the coding in the **GL analysis** section below.
Check the item is coded correctly and amend if required:

a. **Account** – autopopulated from the UNSPSC code.
b. **Cost** – autopopulated from the subproject
c. **Project** – autopopulated from the subproject
d. **Subproject** – defaults to the subproject entered in the Requisition entry screen but can be changed.
e. **Details** – pick a category if obvious or leave as General
f. **Cat7** – autopopulated from the subproject
g. **Tax code** – defaults to PS (standard rate) but can be changed.
h. **Tax system** – autopopulated from the subproject
i. **Percentage** - % of total cost for this item to be charged to the subproject.
j. **Amount** – total cost of this item

- There are four tax codes in Business World:
  - PS – 20%
  - PL – 5%
  - PZ 0% (zero rated)
  - PE – 0% (purchase exempt)
- If you select tax code PE the VAT exemption certificate will be printed on the PO.
- If you need guidance on tax codes, contact the Procurement Team.

17. If required, expand the **Detailed information** section and enter a comment for the supplier. This could include any supplier references, part numbers, product codes.

18. Click the **Documents** icon to attach relevant documents (e.g. supplier quotation).

Click **Add a document** then locate an upload the file from your computer (use document type-**Requisition Internal Attachments**).

19. When you are finished click **Save**. The **Funds check** window may be displayed.

- Funds check automatically checks for sufficient funds in the budget. If the Funds check fails you will get a warning message but it will not stop you from completing the order.

20. Click **Funds check results** to view the available budget, or click **Yes** to ignore the warning and continue.
21. A success message is displayed and the requisition is assigned a number.

   Note: requisition numbers begin with ‘5’.

What happens next?
If the value of the requisition is £25K or less, the requisition is routed straight to the relevant Approver, (depending on their authorisation level), to approve the expenditure.

If the value is greater than £25K, the requisition is routed first to the Checker who checks that:

- Good procurement practice has been followed
- Supplier you have ordered from is appropriate
- Items you have ordered are appropriate
- They support the purchase

On approval by the Checker, the requisition is then routed on to the Approver.

   - In some departments the Checker and Approver is the same person. In that case the person only sees the requisition once.
   - Amounts over £50K require additional approval by the College Secretary and Director of Finance.

Once fully approved a purchase order is automatically generated from the requisition and sent to the supplier, either as a PDF file by email, or an xml file by direct transfer to the supplier’s system.

B. Raise a catalogue requisition (e.g. Office Depot)
This method is for suppliers whose online catalogues are available via Proactis and with whom Birkbeck has a procurement contract e.g. Office Depot.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1.</td>
<td>Follow steps 1-4 in the section A.</td>
</tr>
<tr>
<td>2.</td>
<td>At step 5, click the globe icon to go to the supplier site.</td>
</tr>
<tr>
<td>3.</td>
<td>Search and add items to your basket on the supplier’s site (note each supplier’s site will have a different look and feel)</td>
</tr>
<tr>
<td>4.</td>
<td>Click the Checkout button on the supplier’s site (e.g. for Office Depot, click the red CHECK OUT button).</td>
</tr>
</tbody>
</table>
For Office Depot, do not click the **Checkout** link in the shopping basket at the top of the screen as this will navigate you away from your order.

5. **Click Continue** to return to the Proactis basket.

6. **Click Checkout** to return to Business World. The UNSPSC coding is applied automatically.

7. Follow steps 14-22 in the previous section.
   - Although a supplier has an online catalogue, some items may not be available from the catalogue and should be ordered free text.
   - Some suppliers allow you to submit a mix of catalogue and free text items in the same requisition. Other suppliers (e.g. Office Dept) do not so you will have to submit on separate requisitions.

**What happens next?**
The requisition is routed to the relevant Approver (or Checker if the value is >£25K), as for free text requisitions.

**Where to go for help**
If you need help with the system raise an ASK query. If you have questions about the procurement process or need guidance on tax codes, contact the Procurement Team.