Introduction
This guide explains how to raise a requisition in Business World. There are two ways to do this:

<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 e-procurement 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>

Audience
All staff responsible for purchasing goods and services.

Workflow
Here is the basic workflow for creating a requisition:

A. Raise a free text requisition

<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 &gt; Requisitions – Marketplace.</td>
</tr>
<tr>
<td>2.</td>
<td>Complete the Requisition entry tab:</td>
</tr>
<tr>
<td></td>
<td>a. External reference – not used</td>
</tr>
<tr>
<td></td>
<td>b. Internal message – comment for the Checker &amp; Approver</td>
</tr>
<tr>
<td></td>
<td>c. Req-asset – is requisition asset-related (y/n)?</td>
</tr>
<tr>
<td></td>
<td>d. Subproj – subproject to which purchase will be charged</td>
</tr>
<tr>
<td></td>
<td>e. Send – send PO to supplier (y/n)?</td>
</tr>
<tr>
<td></td>
<td>f. Delivery date – use calendar to enter the date. For goods/services delivered in batches enter the delivery date of the final batch.</td>
</tr>
<tr>
<td></td>
<td>g. Delivery contact – address</td>
</tr>
<tr>
<td></td>
<td>h. Delivery to – room</td>
</tr>
<tr>
<td></td>
<td>i. Delivery attention – name of the recipient</td>
</tr>
</tbody>
</table>
3. Click **Go shopping**. This takes you to the **Supplier Directory** in Proactis.

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

   a. **Item description** - as given in the description in the supplier catalogue
   b. **UOI** – unit of issue, as given in the description in the supplier catalogue
7. Where relevant, click the twisty on the left of the line to add more detail.

```
<table>
<thead>
<tr>
<th>Item number</th>
<th>Catalogue</th>
<th>Net value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NonCatalog:121131</td>
<td>£125.00</td>
</tr>
</tbody>
</table>
```

OEM = original equipment manufacturer

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

9. Click Checkout.

10. In the Category Coding screen 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>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>£50.00</td>
<td>5</td>
<td>£250.00</td>
</tr>
<tr>
<td></td>
<td>£25.00</td>
<td>5</td>
<td>£125.00</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 3 in the example shown).

12. Click Assign to assign the code to individual items, or Assign all to apply the same
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:

   ![Requisition details table]

16. **For each line in the Requisition details section, click the line to display the GL analysis/coding below.**

   ![GL Analysis table]

Check the item is coded correctly and amend if required:

- **Account** – autopopulated from the UNSPSC code.
- **Cost** – autopopulated from the subproject
- **Project** – autopopulated from the subproject
- **Subproject** – defaults to the subproject entered in the Requisition entry screen but can be changed.
- **Details** – pick a category if obvious or leave as General
- **Cat7** – autopopulated from the subproject
- **Tax code** – defaults to PS (standard rate) but can be changed.
- **Tax system** – defaults to PR but can be changed.
- **Percentage** – % of total cost for this item to be charged to the subproject
- **Amount** – total cost of this item
If you select tax code PE the VAT exemption certificate will be printed on the PO.

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. If required, click **Split row** to split the costs across different subprojects. A duplicate row is displayed.

19. Click the new row to edit it. Change the **Subproject** and split the order by percentage or amount.
   Note: percentages and amounts should balance **for this item**.

20. When you are finished coding 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.

21. Click **Funds check results** to view the available budget, or click **Yes** to ignore the warning and continue.

22. 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 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 (Office Depot)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Follow steps 1-3 in the section A.</td>
</tr>
<tr>
<td>2.</td>
<td>At step 4 select a supplier with an online catalogue e.g. Office Depot.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the globe icon to go to the supplier site.</td>
</tr>
<tr>
<td>4.</td>
<td>Search and add items to your basket (note each supplier's site will have a different look and feel)</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Checkout button</strong> on the supplier's site e.g. Office Depot.</td>
</tr>
</tbody>
</table>

Do not click the **Checkout** link in the shopping basket at the top of the screen.
6. **Click Continue** to return to the Proactis basket.

![Description]

Bic Cristal Medium 0.4mm Ballpoint Pen Black Pack of 50
Item number 538216 entered product code 538216

![CONTINUE]

7. **Click Update basket.**

![Add supplier Alternatives Empty basket Update basket Checkout]

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

9. Follow steps 14-22 in the previous section.

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- 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.
- Do not mix tax codes on the same requisition. Items should be ordered on separate requisitions.

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

**Where to go for help**
If you need help with the system contact [businessworld@bbk.ac.uk](mailto:businessworld@bbk.ac.uk). If you have questions about the procurement process or need guidance on VAT or tax codes, contact the Procurement Team.