Requisitioning - the Buyer role

1. Log into Proactis
2. You will see messages in your tasks tray alerting you to how many items you have waiting order consolidation.

   You have 2 items currently awaiting order consolidation.

3. Click on the message and a list of the items is displayed.

4. The requisition number will begin with TEC or GEN and determines that the items have gone through the correct authorisation.
5. You can open each item to review it. Please do not change anything on marketplace supplier items.
6. In reviewing the item you should check:
   a. An item requiring technical authorisation has not been submitted on a GEN template
   b. Compliance with Procurement division or College/Corporate Service policies and guidance
7. In the status section the “Review” radio button is checked. Once you are happy with the item check the “Released” button. The “Held” option is not relevant for marketplace items.
8. Click on “store item line” at the bottom of the screen
9. Alternatively, for bulk changes check the box next to each item
10. And select the “change status” option.
11. Check the “Release” radio button

**Select desired status**

- Held
- Review
- Cancel
- Release

* Items will not be consolidated

12. The status of each item is changed to “released” click on OK.

To reject an item select the “Cancel” radio button. It will be returned to the requisitioner’s rejected items basket. Requisitioners should be subscribed to an email message that will notify them of the rejection. They can amend the item, replace it with another or delete it.

13. The status of each item has been changed to “release”

14. The items can either be consolidated into a draft order immediately, or the Buyer can wait until they are satisfied that all requisitions have been approved and released before consolidating into draft orders.

15. After consolidation the requisition becomes a draft order and needs to be submitted.

16. To view, click on the Buyer tab, you will see the message “You have 1 unconfirmed order awaiting buyer”. Click on the message.
17. Select the draft order.

18. You are given the option to cancel the draft order in this screen.
19. You will need to enter a reason for the cancellation and then select “Save Reasons”.

20. To view the commitment report go to “Edit items”.

Choose the part of the purchase order to edit

- Edit header
  Edit the header information that will appear on the purchase order.

- Edit items
  Edit the items that will appear on the purchase order.

- Edit footer
  Edit the footer information that will appear on the purchase order.
21. Click on view commitment report in the left hand menu

22. Go back to Edit order and submit. It will not require further authorisation unless the total cost is above £25k when it will be routed to Procurement.

23. You will need to subscribe to the relevant email messages in order to be notified when you have requisitions waiting. Go to the Admin tab and select “Manage system feedback messages and scheduling”.

24. Click on “Edit my message subscriptions”.

What would you like to do?

- Change my login password
- Manage stand-in authorisers
- Manage system feedback messages and scheduling
- Manage department settings
- Streamline your PROACTIS

Optimise, streamline and customise PROACTIS to behave more efficiently and effectively for you. Speed up regular and repetitive tasks and manage your lists of favourites.
25. Select the messages you wish to receive and click on “Save Subscriptions”.

26. Now set your message schedules

27. You can change the times that proactis emails you by checking the box and entering 1 for every hour, 2 for every 2 hours etc. Save your schedule.

28. You can also set the days and times that you wish to be emailed. Click on Advance Settings

29. Once your preferred schedules are selected click the Save Advanced Schedule option at the bottom of the screen.
30. You will also receive email notification once your order has been received by Sciencewarehouse

a. This order was successful

From: support@swarle.com
To: c.l.palmer@bham.ac.uk
Cc:
Subject: Purchase order FIN461149 issued to Office Depot

REFERENCE: P0 FIN461149

The above Purchase Order has been issued to the supplier, Office Depot

b. This order was rejected because it contained tax codes that were not the same

From: support@swarle.com
To: c.l.palmer@bham.ac.uk
Cc:
Subject: Purchase order FIN461181 rejected

REFERENCE: Purchase order FIN461181

This purchase order has been rejected by Science Warehouse

Reason: Order FIN461181: Cannot mix tax statuses in one order

c. This order will be completed manually as it contains some elements that did not come from the supplier’s current catalogue, for example an old catalogue price or added item comments.

From: support@swarle.com
To: c.l.palmer@bham.ac.uk
Cc:
Subject: Purchase Order FIN461147 Marked as 'Off-catalogue' and sent to supplier

Purchase Order FIN461147 contains details that Science Warehouse recognises as different to the supplier's current catalogue.

For further details either log into the Marketplace or contact your administrator.

This order has been sent to the supplier as an 'Off-Catalogue' order.

Kind regards,
Science Warehouse

The next time you go into the e-marketplace you will see a list of your most recent orders
Visit our online tutorial at:

http://www.fs-tutorials.bham.ac.uk/marketplace.shtml