1. 'Purchase requisition screen

All requisitions are to be raised through the "Purchasing" in the "Your Employment" tab including purchases from Banner. 'Requisition – standard' menu access has been removed from requisitioners.

UNIT4 ERP								
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Homescreen menu								
	Start pages	Your employment	Your employment					
Your employment	Expenses	C Employee Home	* Personnel information					
]	♀ Organisation Chart	Absences					
Forms	Absences	♀ Line Manager Structure	Q Payslip					
	Purchasing	✤ Financial Approval Hierarchy	Q Payment simulation					
Time and expenses		🔍 Manager Dashboard	✤ Activate your substitutes					
	Timesheets	All Previous Forms for Your Resources						
Personnel	Communities							

For Banner orders please click on "Banner Punchout".

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i≣ în	sc Pur	rchasing ×									
Purchasir lew reques	ng t (?)										
Q Fir	d product	ts			Purchas	e request	GB	Banner Punchout			
equisitions	?										
Find purchase	es by order r	number, nam	e, supplier, re	quisitioner or	contract	*					
Dra	aft		C	In progres	55		Sent	Confirmed		Received	
		0			0		0		0		0
xpected de	liveries										
Today		4	September	2024 🕨							
mon	tue	wed	thu	fri	sat	sun					
26	27	28	29	30	31	1					
2	3	4	5	6	7	8					
9	10	11	12	13	14	15					
16	17	18	19	20	21	22					
23	24	25	26	27	28	29					
30	1	2	3	4	5	6					

The Banner window opens and follow the normal ordering procedure. When you click on "proceed to checkout" you return to the ERP Purchase request screen with the purchase order lines populated. An error will appear as you have to open the header box to complete the sections.

E n Uschase request ×								
Purchasing > Purchase request								
Purchase request								
On behalf of Requisitioner* Dammy Resource Add a name to this purchase request								
Add delivery group 7 Message	Delivery date 19/09/2024 🗮 Apply to selection Apply to all 🕑 Header 🕐							
Delivery to								
Delivery centext* Delivery address Strenhal HQ (Delivery) • Strepshire Council HQ The Shirehal Abbey Foregate Streesbury Shropshire SY2 6HD	Ą							
Delivery description Delivery attention Delivery information								
Product Metapolicien Supplier Delivery date Quantity Unit	Price Currency Currency amount Funds check Tax code							
□ @ @ A43010-102 Besswift Click 4 D-ring MidsolBesswift Click 4 _ Banner Group Ltd 19/09/2024 1.00 46181604[EA	12.12 Sterling Pound (GB) 12.12 P1							
Add product Delete product Copy product Move selection here More product information	Total amount: GBP 12.12							

N.B. The below two points relate to the requirements of the <u>Spending control gateway - SC Intranet</u> (<u>shropshire.gov.uk</u>). The fields are not mandatory but should be completed for all transactions in scope of the gateway and are to provide additional information to support and speed up the approval of the purchase requisition.

2. Expenditure Justification field

The "External reference" on the Header should be populated with justification for the expense which will be reviewed by the Spending Control Board. This is a free text field which is limited to 100 characters and will not appear on the Purchase Order issued to the supplier.

Header		
Supplier	Period*	External reference
	202406	Free text field. Add any exter
	Contract	
	•••	Fixed contract

3. Retrospective Purchase Order field

The Procurement Guidance field on the Header has been repurposed as "Is this a Retrospective Purchase Order for Goods or Services already arranged?" field, which again will not appear on the Purchase Order issued to the supplier. As per the Financial Rules, PO's are required to be raised and approved at the point of order, so retrospective PO's should not be used and is breaking the Financial Rules.



Once all completed and submitted the purchase requisition is then sent down the authorisation workflow as normal.