



Contents

Summary of when to use the P2P enquiry reports..... 2

Introduction to RPU01 2

Where to find report RPU01 3

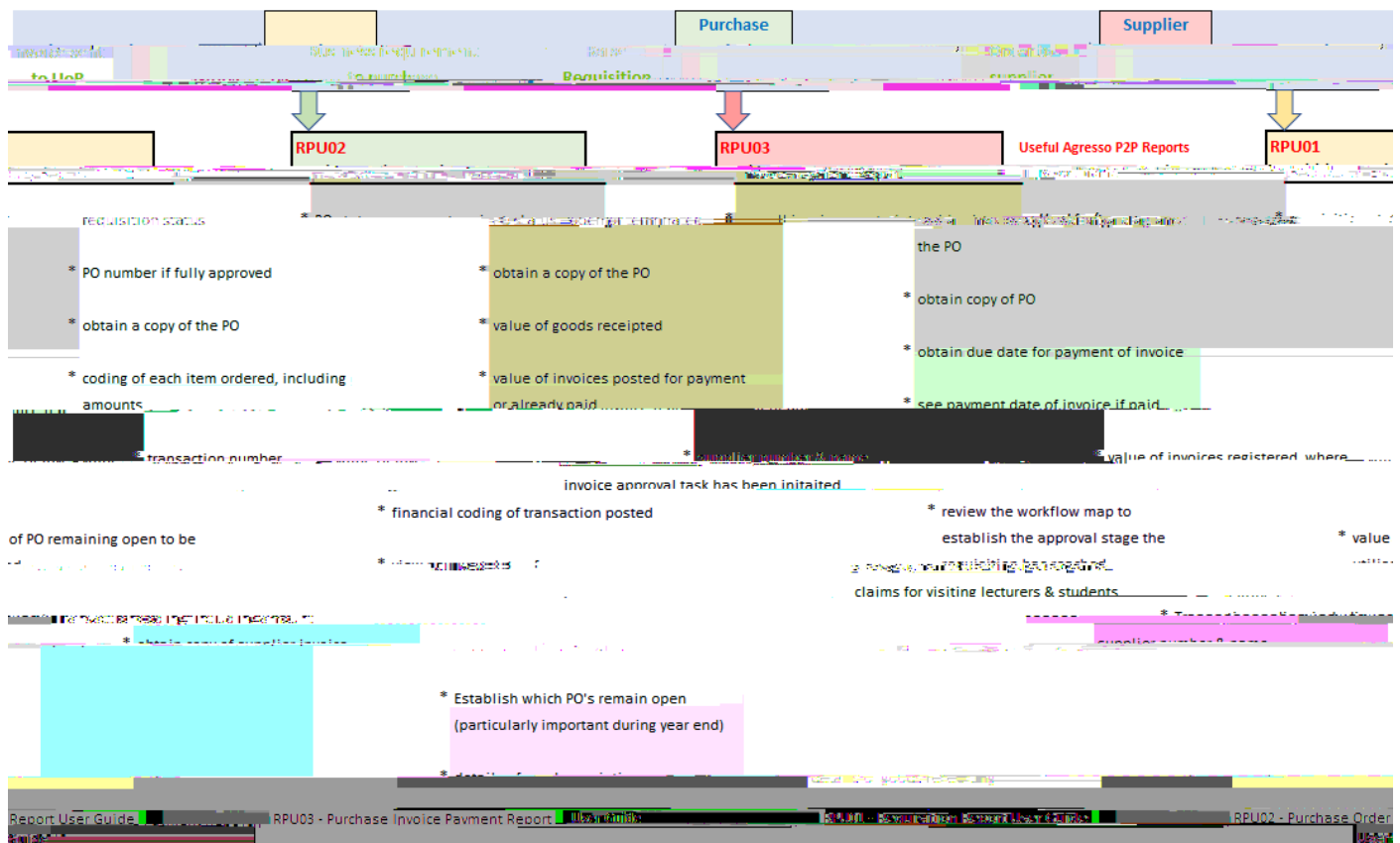
How to use RPU01 3

Managing Rejected Requisitions..... 6

Obtaining a copy of your Purchase Order..... 8

Summary of when to use the P2P enquiry reports

There are 3 useful P2P (purchase-to-pay) enquiry reports available in Agresso web. Below is a summary of what you may use the reports for and the user guides available for each report.



Introduction to RPU01

Ever wondered at what stage your requisition has reached in the approval process or, why your copy purchase order has not been emailed to you? It is because the requisition has not yet been fully work-flowed and approved. You can check for yourself the approval stage your requisition has reached (provided you have the data access controls for the Cost code used) using P2P enquiry report RPU01 - Requisition enquiries, in Agresso web.

This is a P2P report which can be used to check the points listed in the above chart under the heading Raise Requisition.

Where to find report RPU01

This report is available in Agresso web in the following location.

Main menu > Reports > P2P reports > RPU01 - Requisition Enquiries

Should you not have access, please request access to P2P Enquiry Reports by emailing financial-systems@reading.ac.uk. Please copy in your Head of School/Function.

Should you not have data access (because you work in a different School/Function), it is best practice to ask a member of staff in that school/function to check on your behalf.

To save this report as a favourite for easier access, click on the button containing the heart in the top right-hand corner after you have selected RPU01 from the main menu.

The colour of the button will change to blue.

The report will now be available for you to select in your favourites box on the right-hand side of your homepage.

How to use RPU01

1. The selection criteria allow you to search for the requisition using various options. The easiest and quickest

2. Using the Selection criteria

Enter requisition number here if known

Or

Enter your name here

You may also search by cost centre (provided you have data access) or project number or supplier used for your requisition.

Financial periods can be changed if your requisition was raised outside those quoted.

After entering the selection criteria, click Search.

Selection criteria

Requisition Number like

Requisitioner (T) like

Cost Centre like

Project like

Supplier like

Period less than or equal to

Copy to clipboard
Search
Detail level

All levels

- The results will be shown as below where all columns (excluding Purchase Order Number, Status (T) and Links to reports) show the data you entered when raising the requisition.

The blank row directly underneath the column headings can be used to filter the results further. For example, you could search for a specific supplier by entering the supplier number in the blank supplier field, click Search button. This will return any requisitions raised against that supplier.

You may click on anything appearing in blue, to obtain more information. For example, if you click on the Project number, you will be able to see the project title, the owner of the project, the start and end date of the project.

Results														
Search Detail level All levels Copy to clipboard														
905 READING OFFICE FURNITURE — 11 1,450... 1														
7326 SCIENTIFIC LABORATORY SUPPLIES 20 Finished Select link 6 4294742 3297402 Requisition 1 4295 BC 429 UHP Grade Face Viewers COV1015 GBP 1.00 55.00 55.00 1														

- For a requisition which has not yet been fully work flowed and approved, the Purchase Order Number will be and, the Status (T) will be

Results														
Search Detail level All levels Copy to clipboard														
905 READING OFFICE FURNITURE — 11 1,450... 1														
7326 SCIENTIFIC LABORATORY SUPPLIES 20 Finished Select link 6 4294742 3297402 Requisition 1 4295 BC 429 UHP Grade Face Viewers COV1015 GBP 1.00 55.00 55.00 1														

4

5. To view the approval workflow of the requisition, follow the instructions provided below.

	To view the requisition workflow, click on the drop down under 'Links to reports' for the requisition number, then click on the Requisition Workflow option.
	A Requisition – workflow enquiry window will appear. The 'Workflow status (T) column will state Workflow in progress (in blue) if the requisition is yet to be fully approved. Occasionally, the status may appear in grey. If so, click on the Search button which will change the status to blue text. Other statuses include, Finished, Rejected, Terminated. This will take you to the Workflow enquiry map window. A  box around a workflow description suggests that step of the workflow has been approved so that the requisition can move onto the next workflow step. A solid  box suggests this is the stage the workflow has reached and to whom the task for approving the requisition has been sent. In this example, the requisition has reached Department Approval and staff JK223605 (name App Roval) has been sent the task to approve. If there is more than one approver at this stage, you will see more names. <u>M</u> <u>M</u> Once they have approved you will see a green tick against the approvers name and the yellow solid line will become a green line. (See example 1 below) Remember that some requisitions may require Finance and Procurement approval so expect to see more steps for each stage. If the requisition has been rejected, you will see a  solid box and a red stop sign next to the approvers' name. You will receive a task email if it has been rejected which you must act upon. (

	<u>Example 2.</u> Where an approver has rejected the requisition. A red stop sign, and red box appears around the approvers' name. An email will be sent to the requisitioner with a task to close the requisition.
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6.

Obtaining a copy of your Purchase Order

To obtain a copy of the Purchase Order document the requisition must be fully approved and have a PO number. Run this enquiry, entering the requisition number in the selection criteria.

In the results, click on the PO number which will appear in [blue](#).

#	Requisition Number	Purchase Order Number	Requisitioner (T)	Line no	Account	Cost Centre	Project	Product	Description	Line Description	Curr.	Quantity	Unit price	Amount	Supplier	Supplier (T)	Period	Status (T)	Links to reports

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This will take you to the Purchase Order page.

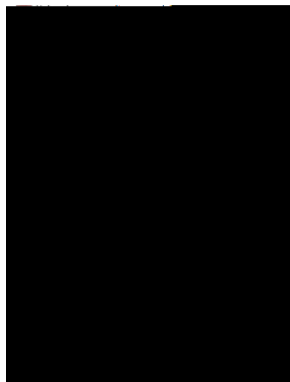
In the top right-hand corner, you will see 5 buttons. The paper clip will be white with a blue background.



Double click on the paper clip.

Depending on the view you have set up in the document archive window will determine how you are able to view the PO document. The options below allow you to change the view.



View Option	Display	Action
		Provides full view of the PO document.
	Document title PQ 3284388 File name Conv Order 3284388	Click on the PO line to view the document.
		Click on the PDF containing the PO number to open the PO document.

To save the document, right click on it when open, select 'Save as' from the drop-down menu to save it to a folder.

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