

ONLINE REQUISITIONING QUICK GUIDE

To raise an Online Requisition, go to **RCSI Staff Portal**, under Resources for Staff click on **Finance Online System**. Select **Procurement**, and then **Requisitions Standard**. You can also access the online system when you are off RCSI Campus <https://connect.rcsi.ie>.

Follow the step by step guide below:

(Don't forget to use the tab key on your keyboard to move between fields!)

1 You can search for supplier by typing part of the name or by clicking on search icon. If supplier is not there, please refer to reverse.

2 Enter dept/grant or use the search button.

3 Enter activity code or N/A if not applicable to the department/project code you are using.

Information: Supplier Evaluation Form/ Written Quotes/Tender Documentation should be attached here.

Information: Delivery date defaults to current day, change if required.

Information: Delivery defaults to your work address.

Information: These codes will then populate automatically under the GL analysis on each line you want to order.

#	Funds check	Product	Description	Supplier	Quantity	Currency	Price	Curr. amount	Amount	Supplier product	Status

4 Search for the product code by typing part of the name or by clicking on search icon.

5 Enter description of the item you are ordering. Use a separate line for every different item ordered.

6 If the item is a product, enter the quantity of products required in the quantity column and enter the price per unit (excl. VAT) in the price column. If the item is a service enter the euro value of the service (excl. VAT) required in the quantity column and enter 1 in the price column.

7 Enter supplier catalogue reference if required.

Information: Delete a row by selecting the row and clicking the delete button.

Information: Copy a row by selecting the row and then click the copy button.

Information: Add new rows by clicking add or click to the next line.

8 The product text section can be used for every line of the requisition – quotation references, discount codes, delivery (not before/after) info etc can be put in here.

9 Refer to tax code section on reverse if not sure of correct code.

10 WT should be entered here if professional/consultancy service, otherwise leave blank.

11 Saves the requisition. This creates a req number and moves the req to the first level of approval.

Information: The split row function allows you to split one line into several dept/grant codes by either percentage or amount. Please refer to reverse.

IMPORTANT
Please note, requisition numbers are not to be passed on to suppliers for orders to be released, you must wait until the requisition has been fully approved and you receive your PO by email from Finance.

DID YOU KNOW...

You can copy previous requisitions?

This function can be used if you need to raise a requisition that is similar to a previous one you have raised.

- › Open the requisition you want to copy by selecting own requisitions and search for requisition.
- › When requisition is loaded; select copy requisition, make any changes and click save. You will be given a new requisition number.

You can save templates for future requisitions?

Templates can be created if you regularly raise the same requisition to the same suppliers. You need to raise the original requisition; after all sections have been completed you then select to save as a template. Name your template and then you will be given a req number. If you want to use templates, you need to click on start from template, select the template you want to use, make any changes and click save.

You can attach documents?

You must attach the Supplier Evaluation Form for all orders above €1000. Orders between €1000-€6000 only require a completed form. Orders between €6000-€50000 require the form plus 3 written quotes. Orders above €50000 require the form plus tender documents. Please note the form/written quotes are not required for recommended suppliers (Please refer to the Recommended Suppliers page under the Finance Section on the Staff Portal).

To attach a document – click on the paper clip icon, then select add a document and click upload to locate your file from the relevant folder. Then press save. Documents attached are for RCSI reference only and will not be sent to the supplier. Please do not attach invoices to requisitions – all invoices must be sent to accountspayable@rcsi.ie.

You can split the cost?

If the cost of a requisition line needs to be divided across dept/grant codes you can do this by splitting the line in the GL Analysis section:

1. Click split row to add another line
2. Amend the account and dept/grant code as required for the lines and then update either the percentage or the amount field
3. Repeat this for as many split GL Analysis rows as required.

FAQs

What do I do if a supplier is not on the list?

Please contact po@rcsi.ie to have the supplier setup. You will need to have a contact email address for the supplier for this to be done.

Can I raise a requisition to be delivered to another RCSI address?

Yes. If the address you need to have an order delivered to is not in the dropdown box, please contact po@rcsi.ie who will set this address up for you. Please note that your personal home address is not allowed.

The currency for the supplier is not correct?

The currency is setup under the master file of the supplier, if you have a price in a different currency other than what is on the system, you may need to request the prices in the correct currency as per the system. Please contact po@rcsi.ie to clarify/confirm.

How do I know which tax code to use?

Please refer to box below for current active tax codes.

Irish TAX Codes	EU Tax Code (Self Account)	Other
P0 – 0% VAT (eg.RCSI Travel)		GB – 0% VAT – Goods/Services consumed in uk
P1 – 13.5% Services/Labour	E1 – 13.5% EU Services/Labour	X – Goods outside EU
P4 – 9% Hotel Accom/Foods		
P5 – 23% Goods/Services	E5 – 23% EU Goods/Services	E5 - 23% All services outside EU

I can't save a requisition because the "funds check" has failed?

This is because there is not enough budget available for the dept/grant you are using. Please check with your dept. head and until funds are available change the status of the requisition to parked.

How can I retrieve a parked requisition?

Using the open function in the requisition standard screen, click search. Select requisition, change from parked to active and press the tab key on your keyboard. Then click save. The requisition will then move to the first level for approval.

How can I check who my requisition is with for approval?

Under Procurement in the menu, click enquiries then Workflow Enquiry – Requisitions and click on search. Click on the Workflow in progress link under Workflow Status on the requisition you are checking, a new window will open bringing up the workflow map for that requisition.

How can I cancel a requisition?

Go to own requisitions, click on the requisition number and when it loads change the status from active to closed, press tab and save. If the requisition has been fully approved and converted to a PO, please contact po@rcsi.ie and request for it to be cancelled.

Please refer to the Finance Online System under the Finance section on the staff portal for more information.

<http://staff.rcsi.ie/administration-and-support/finance/financeonlinesystem>