NASUWT
The Teachers' Union

NASUWT Online Ordering Instructions

WAP Purchase Requisitions

sicon

Version: 1.0

Issue Date: 09/12/2019

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2 Document Control

2.1 Associated Documents

Date	Document Title

2.2 Version Control

Version	Date	Summary	Editor
1.0	09/12/19	First Draft	Rob Boichat

3 Overview

3.1 Purpose

This documents aims to give NASUWT employees a guide on how to place an order via the SICON WAP online ordering system.

3.2 Audience

The intended audience is end users who will place requisitions, authorise requisitions, receive goods and authorise invoices.

4 Solution

4.1 How to Login

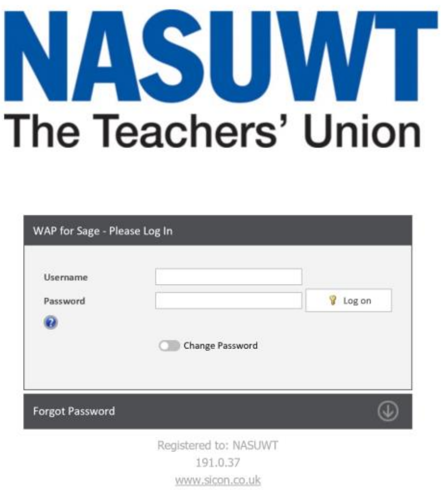
https://sicon.nasuwt.org.uk/wap

Or via a link in an email.

Or via a shortcut on your desktop – IT Support can help with this.

Or via a favourite in Internet Explorer.

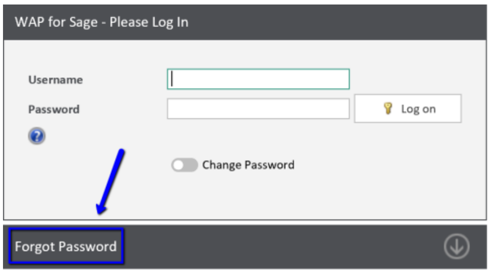
Once you have clicked on the link you will see the following screen:



Your username is exactly the same as your network username if you are an authoriser of orders, or you will have been supplied with a generic username and password if you are only inputting requisitions.

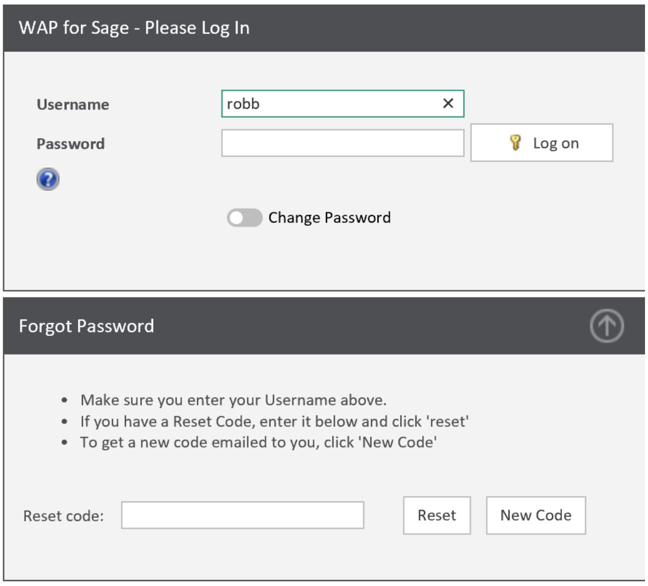
NB: your password must be a minimum of 9 characters and contain at least 1 number, 1 UPPPERCASE character and 1 lowercase character.

If you forget your password you can click the Forgot Password link on the login box.



Follow the instructions on the following screen.

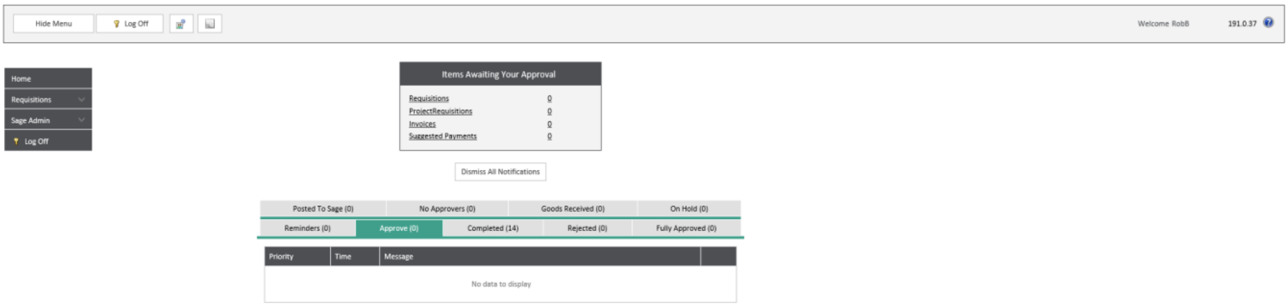
This will now email you a code, enter this in the Reset code box above and reset your password.



Please note that if you enter your password incorrectly 5 times, you will lock your machine from accessing WAP until IT can clear your lock.

This is important to remember as you may be accessing WAP via a link in an email, this will open WAP on a Citrix server. It is this Citrix server that will be blocked from accessing WAP so you will also stop all other users accessing WAP via this server as well.

Once you have logged in you will be presented with the following screen:

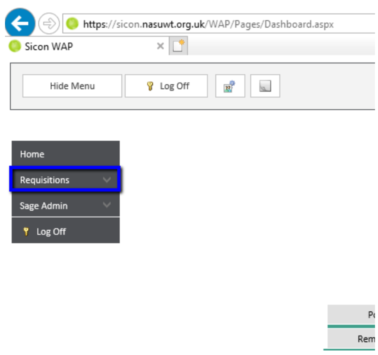


5 How to create a Purchase Order

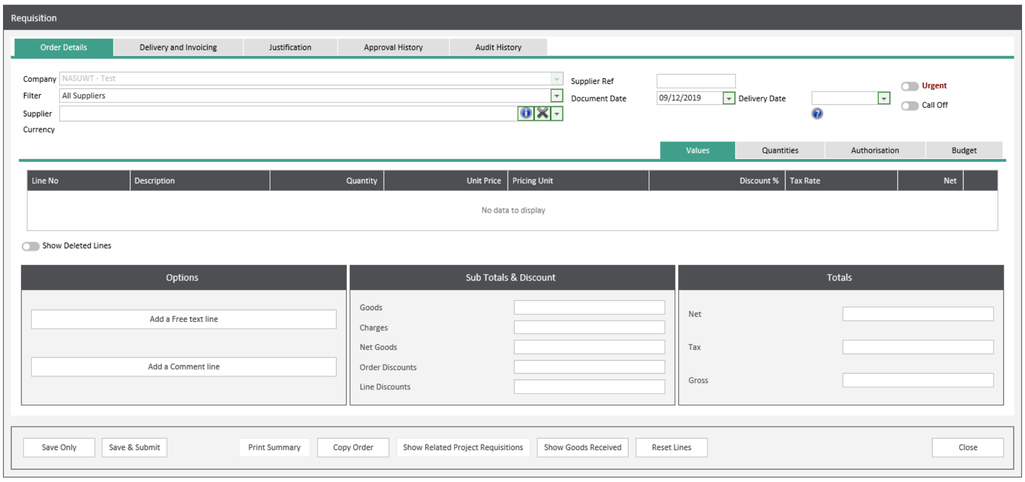
To create a Purchase Order you first need to enter a requisition. This requisition will be sent through a pre-agreed authorisation chain in the system. Once a user with the required authority has agreed the requisition request, a purchase order will be created.

5.1 Create Requisition

Start by clicking on the Requisitions menu in the top left hand corner.



Click New Requisition.



Step 1

Enter a supplier. In the supplier box just start typing the supplier you want to order from. Please note that you will see all suppliers that are listed in the Finance System.

Step 2

Enter a Delivery Date. This is very important and you should enter a date that you expect the goods to be delivered. You will receive emails around this date to remind you that you have goods to receive. If you put today's date and don't receive the goods for a week, you will be notified on a regular basis that you have outstanding items for delivery. If you put a date that is too far in the future to avoid these messages and forget to receive the goods, the invoice will not be sent for approval and therefore delay payment.

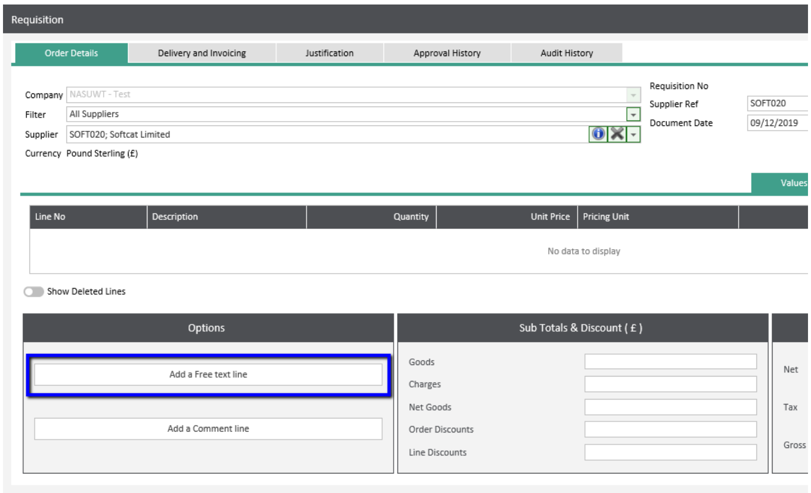
Step 3

Urgent. You need to decide if the requisition is urgent or a call off order. By default when you enter a requisition the next approver in the chain will receive an email informing them to login and check their requisitions. They will receive this within two hours, so in normal operation an urgent requisition isn't needed. If you click Urgent, every approver in the chain will receive an email as soon as their actions are completed.

Call Off. This type of requisition should be used for purchase orders where you are unsure of the monthly amount. Toshiba print copies for example. A yearly budget should be set for this, one order can be placed and this PO number given to Toshiba to quote on all invoices for the year. When you receive the invoice you can Goods Receive the amount on that order, leaving a balance for the remaining year and future invoices. This is a good way of committing budget and makes cost centre reviews more meaningful.

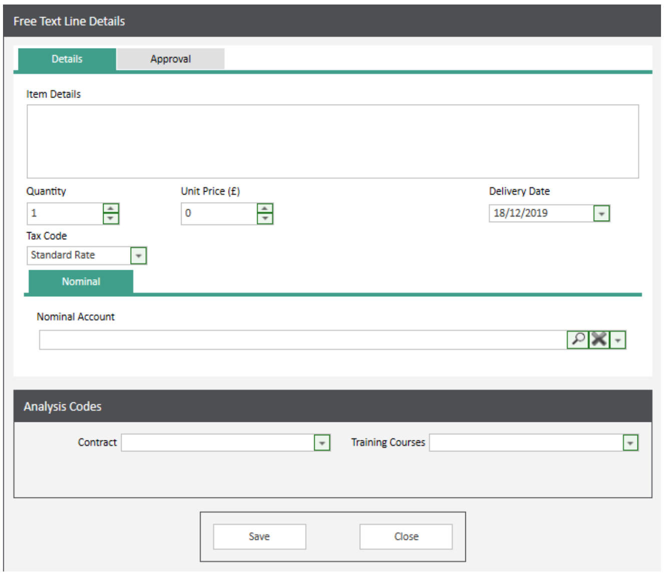
Step 4

Add a free text line.



This is the only way you can add items to the requisition. NASUWT has decided to remove templates and punch out methods of adding items. This is so that there is more control and local processing of procuring goods. This gives you the ability to purchase from the most cost effective method. Office Team for example, you can still find items, add these and order, but you will need to obtain a quote and enter by this method. Pitney Bowes will still be the supplier for mailroom equipment, but again items need to entered in this way (you can still copy an approved order for regular purchases)

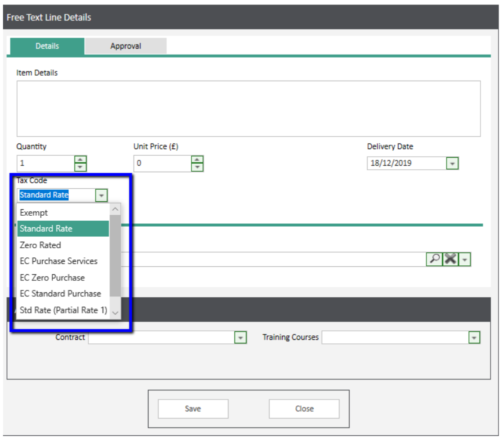
Click Add a Free text line.



Enter the item details in the top box. Please be as specific as you can be in this box as the description will appear on your monthly budget reports. The more meaningful it is here, the more beneficial your budget reports will be. Your budget setting for upcoming years will also become easier.

Enter a quantity and unit price.

VAT is added at the standard rate for all new orders. If you know that your order, or line, is VAT exempt then please change the drop-down to Exempt or Zero Rated depending on the service or goods you are ordering.



Please do not worry about the partial rates we claim as a Union, the Finance program will deal and calculate these.

The delivery date will pull through from the previous screen.

The nominal code is where you want the cost to be accounted to. You do not need to know the codes, typing a description will filter the results for you. You have been given access to the nominal codes necessary for you to place orders for your area of responsibility. If you feel you need to have access to additional codes these can be requested by emailing the Finance National Official for approval. Please note the approval process is based on this code, so if someone does have access to a code where the budget is held in IT, for example, then the approval chain for that line will go via IT approval.

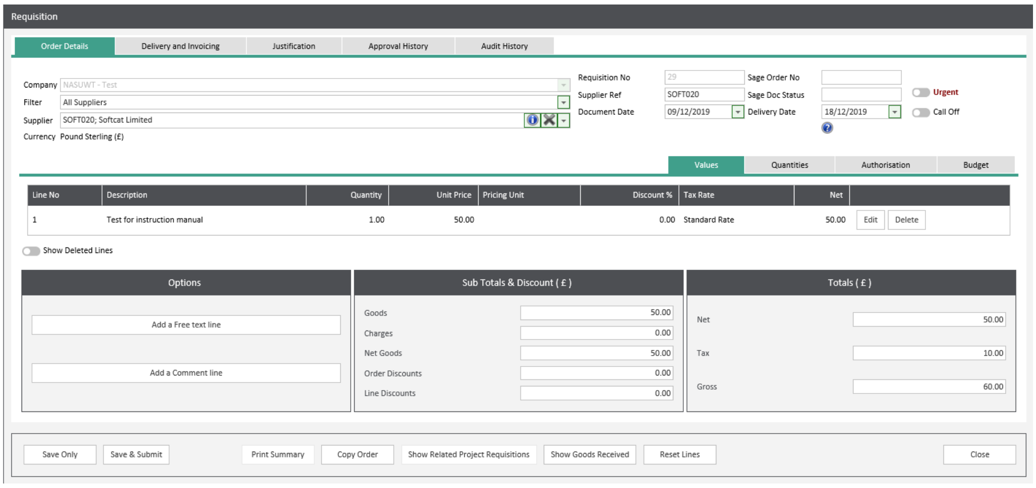
The analysis codes allow you to select a contract ID if you have an internal contracts database, LA will allow you to select the LA you are purchasing for, Staff Codes will assign an expense to a member of staff and EXEC will allow the coding to that Exec member. These codes will be shown on your budget report and are there to help you and Finance accurately report and reflect the expenditure you are incurring on behalf of NASUWT. If you need any type of code adding, please email the Finance Team as these have to be added in the back end system.

Once you have entered the information, click Save.

The Add a Free Text box remains open so you can add another line if needed. Please remember to change the delivery date on this line if needed, for example if you are adding a yearly contract with a fixed price but with monthly or quarterly billing.

Also, please check that the nominal is correct as this will be the same as the previous item added.

If you have added all items, click Close.

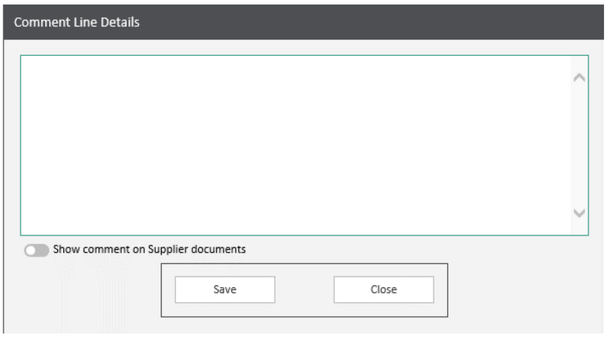


If you have forgotten to add an item, follow the instructions above.

If you have a yearly contract that is billed monthly, you will need to add 12 lines; 1 for each month to the value for that month, remembering to change the individual delivery date on each line. One PO number can be given to the supplier and you will just need to goods receive each month for payment.

Step 5

Add a comment. If you need to add any comments to the order you can click this button to do this.

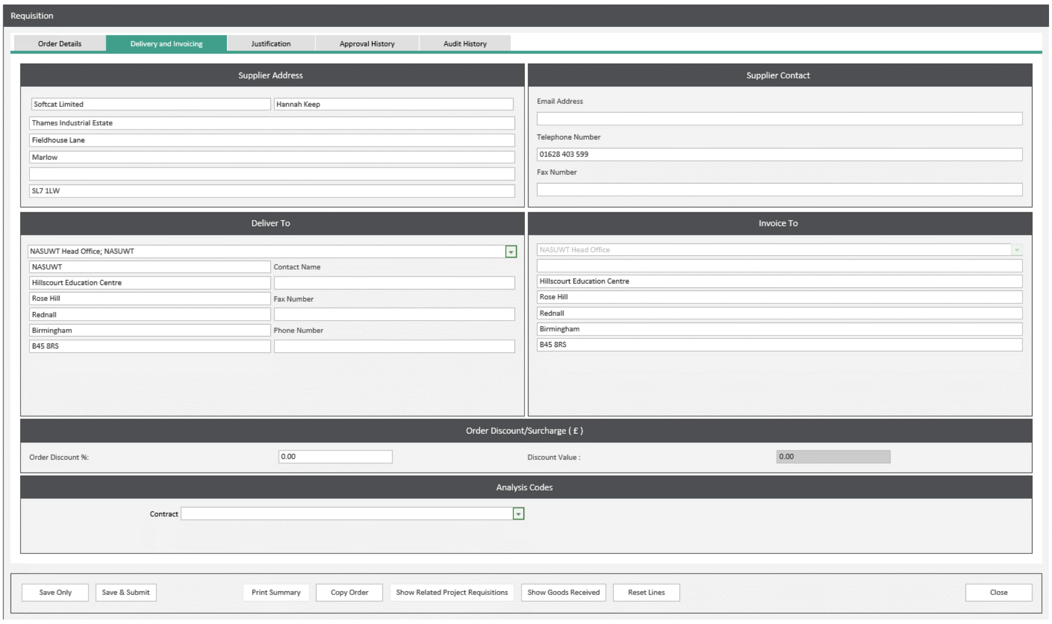


You can choose if this is internal or visible to suppliers.

Step 6

Delivery Address. Click on the Delivery and Invoicing tab

The following screen is shown:



This shows the supplier details. These details are pulled directly from the Finance System. If these are incorrect please e-mail Finance who can change them for you. You have the ability to type an email address or amend an existing one, however you will need to do this every time, so if it's wrong please let Finance know.

You can select the delivery address in the bottom left hand box. Your default delivery address is your office.

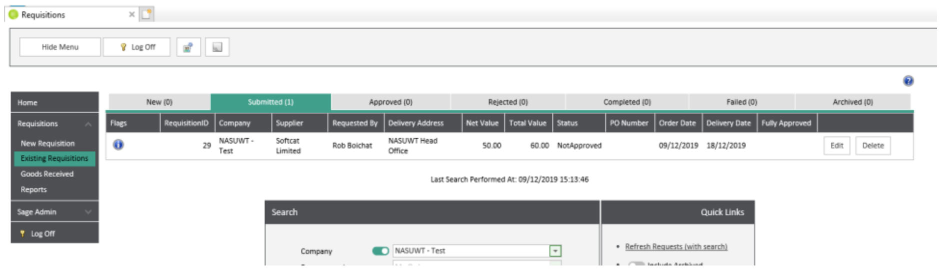
You cannot change the invoice address. All invoices should be emailed to Invoices@mail.nasuwt.org.uk these are picked up by Finance and entered onto the system. There is no need for you to receive an invoice and post to Rednal. You will be able to view the invoice within WAP.

Step 7

Justification. If there is a specific reason for this order you can specify on this tab. You can upload files here. A copy of the contract, a business case that has been signed off etc.

Step 8

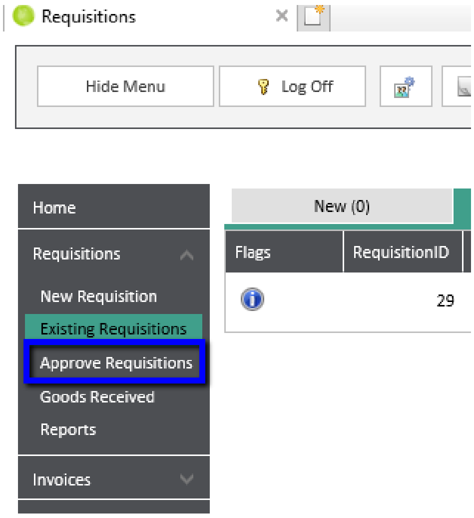
Save and Submit. Once you are happy with the requisition you can then click Save and Submit at the bottom of the screen. This then sends the requisition for approval. Click Close to return to the screen below:



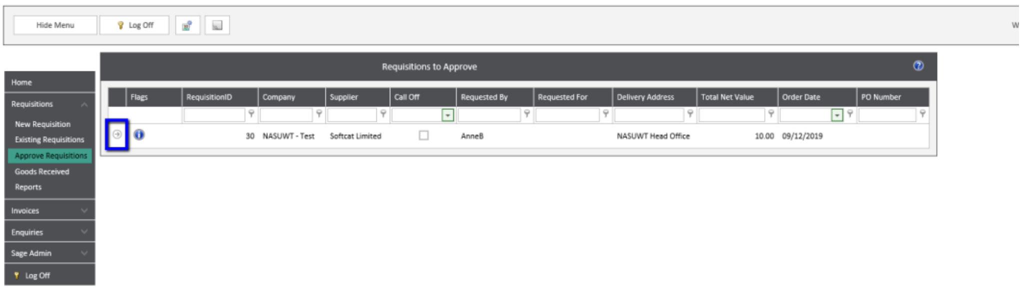
5.2 Approve a requisition

To approve a requisition you can either click the link you receive via email, or login to the system on your PC.

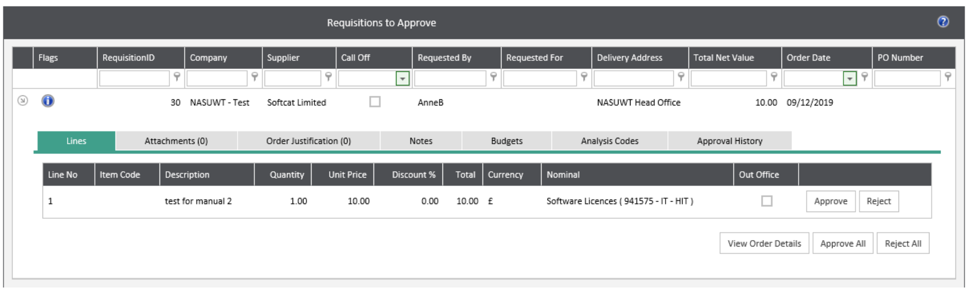
You will need to expand the Requisitions menu and click Approve Requisitions



The following screen will display:

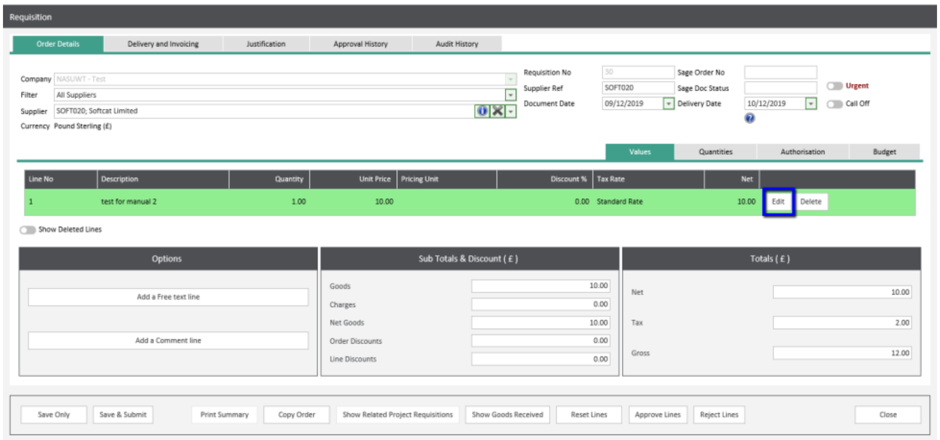


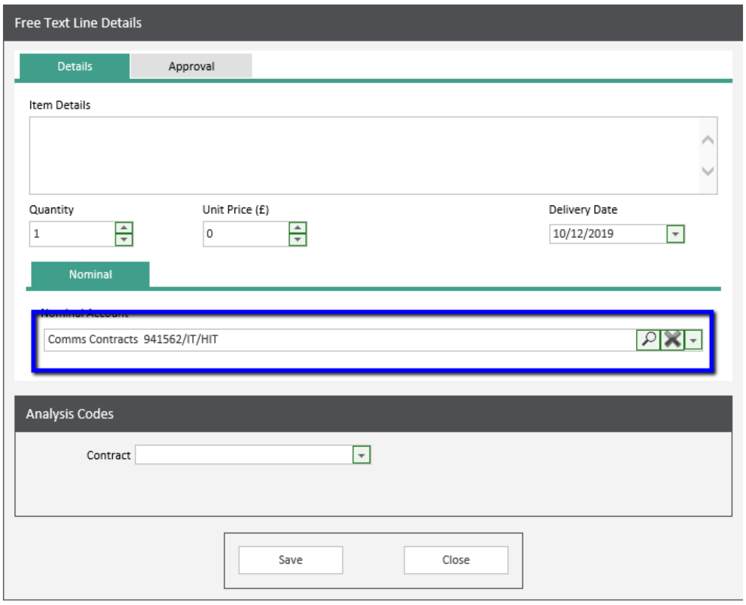
This lists all requisitions needing approval. Please remember to click the arrow to show details of the order.



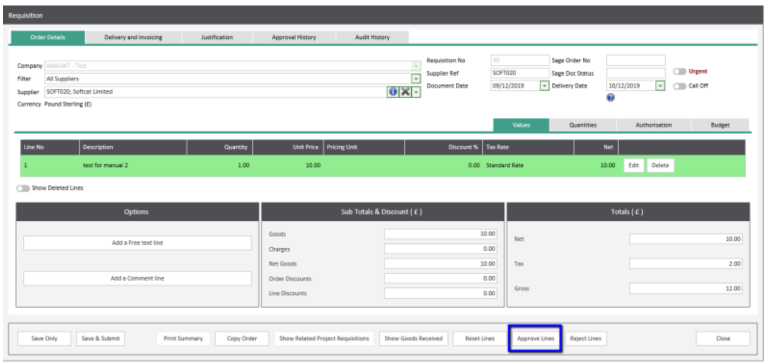
The approver can now approve individual lines or the whole order.

The approver can also click View Order Details and then edit an individual line. This is helpful if you need to amend the nominal code where the line is being coded.





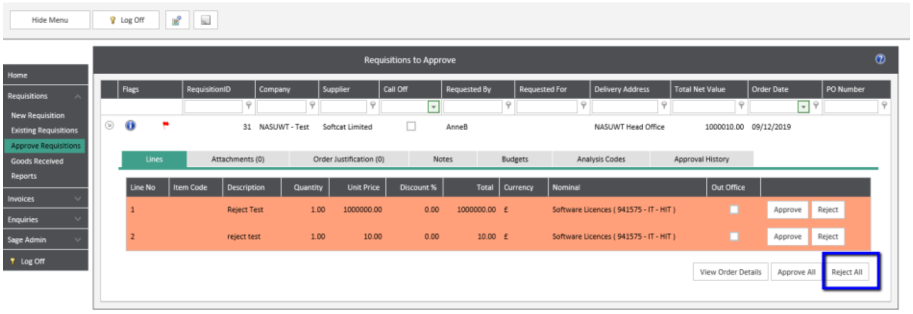
You can now approve on the next screen.



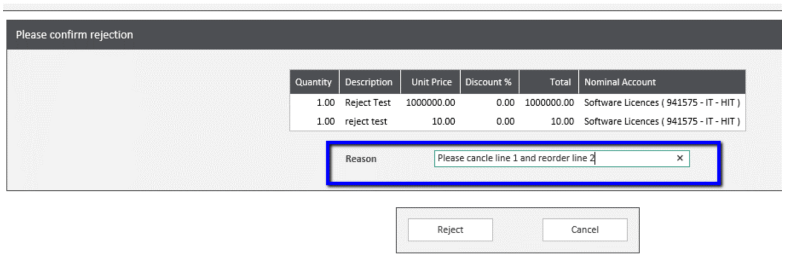
5.3 Reject a Requisition

If you choose to reject a requisition, please reject the whole requisition. There is an option to reject individual lines, however this may cause complications for authorisations up the chain so we do not recommend this course of action.

When viewing the requisitions to approve.



Once you click Reject All you will be asked for a comment.

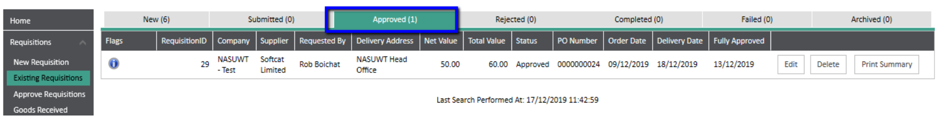


If a requisition has been rejected, go to the Rejected tab and edit the whole order and then Save and Submit again.

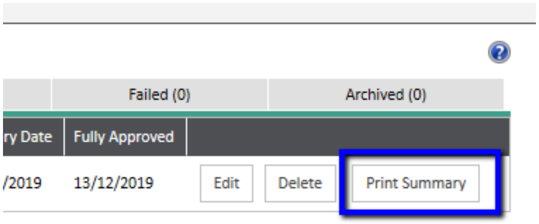
5.4 Send the authorised Requisition to a supplier

At the moment the system will not automatically email an authorised requisition to a supplier. Future upgrades will make this possible, so if the supplier has a contact email, or you type one in, the order will be automatically ordered.

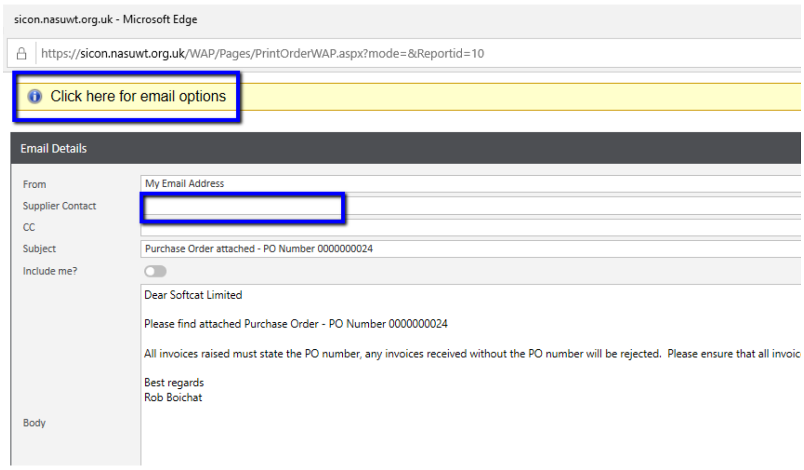
To send a PO to a supplier, go to your Existing Requisitions list and click on Approved.



Click on Print Summary.



A new window will appear showing the PO. At the top you can select Click here for Email Options. You will now be able to send the supplier the PO. If the supplier has an email contact this will be populated, or you can type one in.

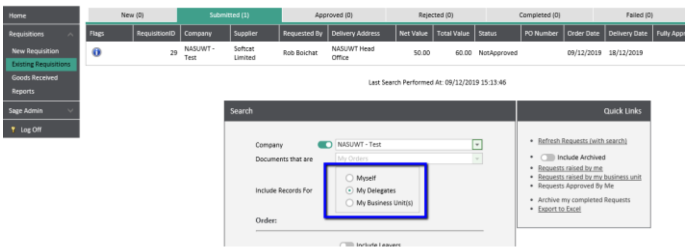


Click send

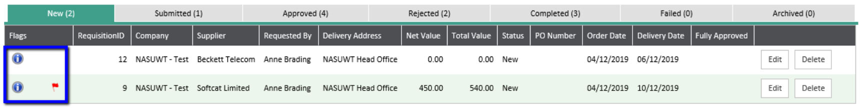
5.5 Status of Requisition - New

At the top of the page you will see various headings

NEW – shows new requisitions added and saved, but not submitted. This list will fill up if you start to enter a requisition and click Save. This can be handy if you have multiple items to add and want to split the work, or if you are awaiting a final price. You can change the filter to show all requisitions from your department (business unit) this is good if you need to pick the entering of lines from a colleague.



To change, click Apply Filter at the bottom of the page.



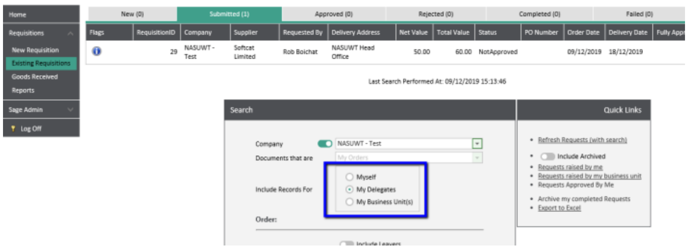
You will see the orders have some flags.

The exclamation mark is normally very handy. If you hover over it you will see what's happening/happened with the requisition. With new requisitions it won't offer much detail.

The red flag shows the order is over budget.

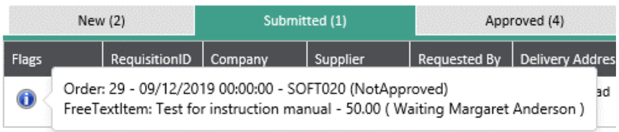
5.6 Status of Requisition - Submitted

Submitted – this is where you can see a list of all submitted requisitions. You can choose to show requisitions from you, your delegates or your business unit. Your business unit will be your department.



To change, click Apply Filter at the bottom of the page.

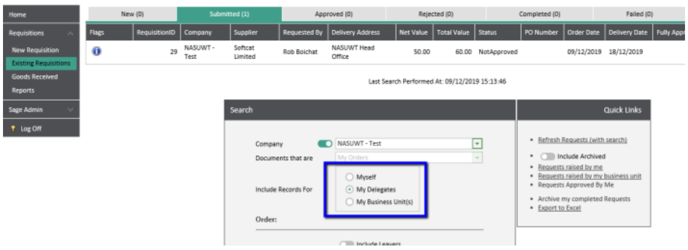
Again you will see flags. The exclamation mark here shows more detail.



This shows the requisition isn't approved and is awaiting approval from Margaret Anderson.

5.7 Status of Requisition - Approved

Approved – this is where you can see a list of all approved requisitions. You can choose to show requisitions from you, your delegates or your business unit. Your business unit will be your department.



To change, click Apply Filter at the bottom of the page.

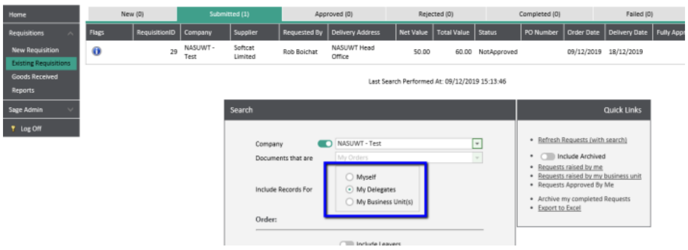
The flags here will show the history.

The envelope shows the order has been emailed and the printer identifies it has been printed.

5.8 Status of Requisition - Rejected

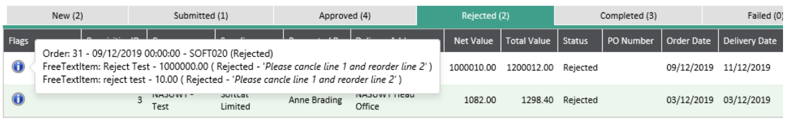
Rejected – any requisitions that an approver has rejected will appear here. A reason is needed to reject the order so please check and action as needed.

You can choose to show requisitions from you, your delegates or your business unit. Your business unit will be your department.



To change, click Apply Filter at the bottom of the page.

The flag here will show a rejection reason.



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5.9 Status of Requisition – Completed/Failed/Archived

These statuses show as expected: completed, failed and archived requisitions. As above, flags can be hovered on to show history.

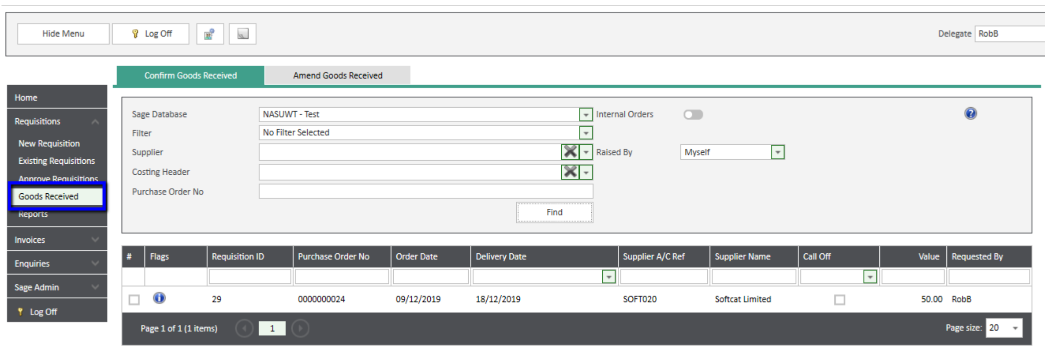
6 Goods Receipt

Goods receipt is a very important part of the system. As the name suggests you are accepting delivery of the goods you have ordered. Without doing this any invoice should not be processed for payment.

6.1 How to Goods Receive

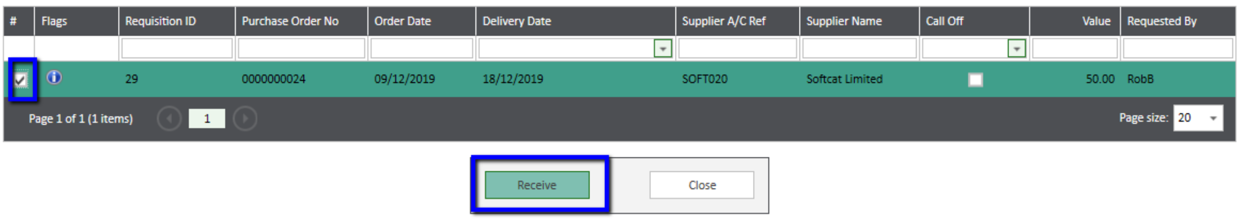
You will receive emails from the system informing you that you have orders to Goods Receive. This is determined by the delivery date set on the requisition and why it's so important to enter that date correctly. If you enter a date too soon before the actual delivery, you will receive emails informing you to receive goods that you haven't had, or if you enter one that's too far in the future you won't get the notification in time.

To access the goods receipt module, either click from the email, or expand the Requisitions module and select Goods Received

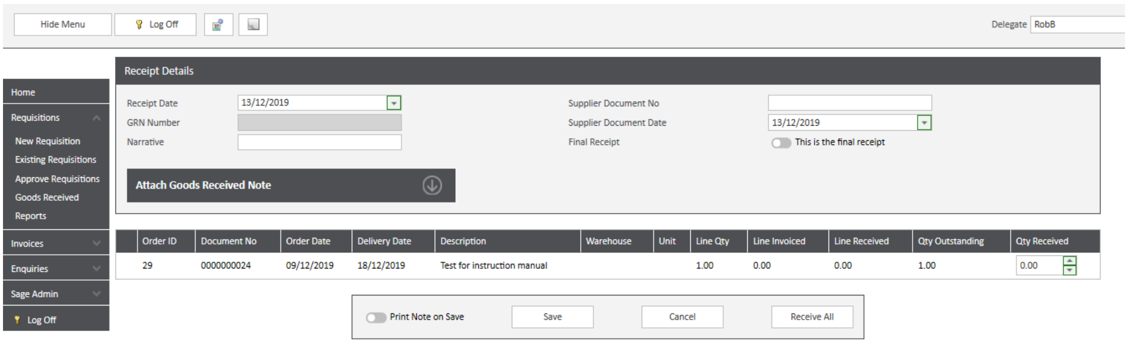


This will show you a list of orders that need receipt.

Tick the box that you need to receipt, and then click Receive.



The following screen will appear:



You will need to enter the supplier delivery note in the top right hand corner. This is mandatory so please make sure whoever accepts delivery and has the goods, informs the person receipting that the goods are here and passes over the delivery note.

There may be occasions where a delivery note isn't received. This would be true for contracts. We ask that the person receipting uses the following format:

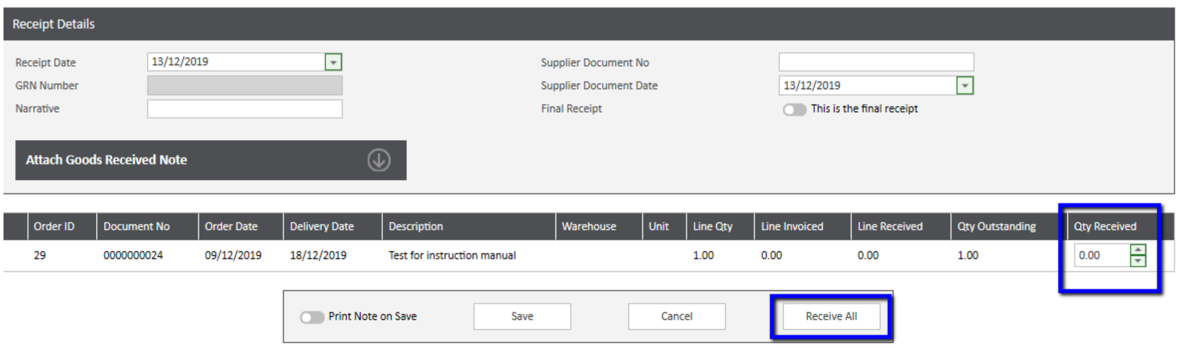
Name – Date

This will allow any questions to be directed to the correct person.

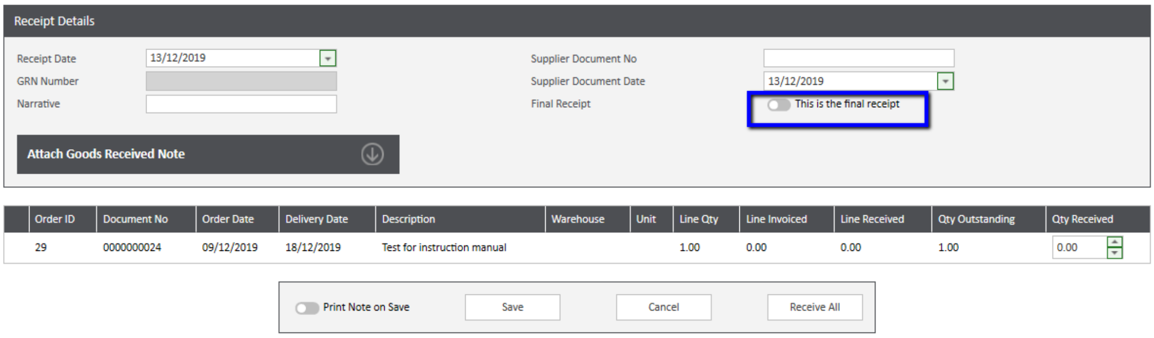
The supplier document date should be entered as well.

If you wish you can attach a goods receipt note, however there is no requirement for this. You may want to if the order is in dispute, or if it's part delivery, or if goods were damaged and this was recorded the carrier.

For each line enter the quantity of goods you are receiving. This will normally be for the amount entered and if this is the case you can click Receive All



There may be times when a supplier informs you that they can only supply 5 of the 10 items. In this case receive 5 and then click This is the final receipt.

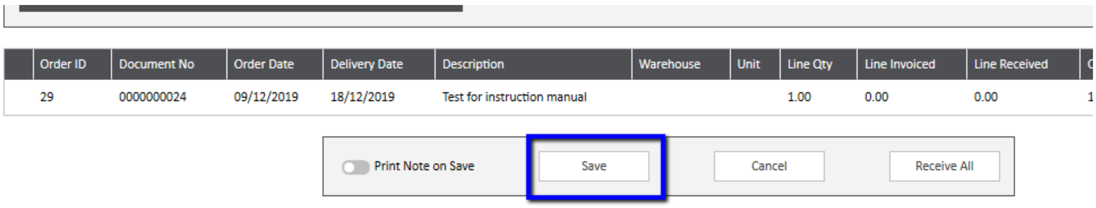


This will now close this order and enable accurate matching to the invoice.

This will also release the remaining budget from this order, meaning you can now order the remaining items from a different supplier (following the requisition process).

If the supplier offers you the goods after all and you have final receipted the order, you will need to raise a new requisition for this.

Once you have Completed all lines, click Save.



7 Invoices

All invoices will be now be sent direct to the Finance Team. If any suppliers are sending invoices direct to staff members, they should be contacted and informed of this new process.

All invoices will be approved via the same approval process as a requisition. Until the last person in that chain has approved the invoice, the supplier will not be paid.

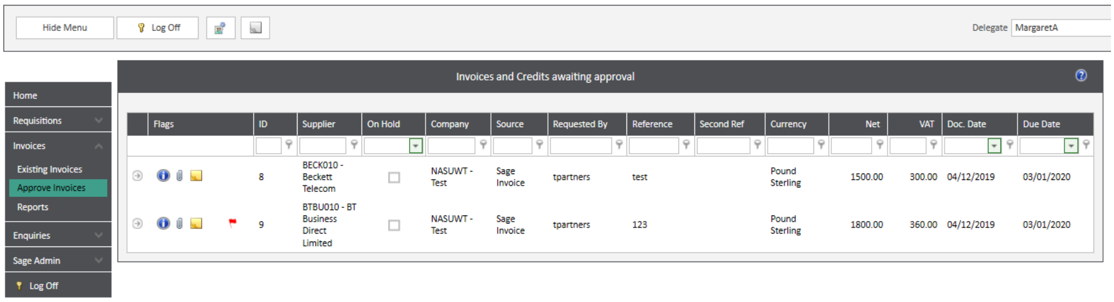
No paper copies of invoices will be sent out to end users. All approval will be via WAP.

Any invoices without a WAP purchase order will be returned to the supplier and not paid. All suppliers have been informed that their invoices need to quote our

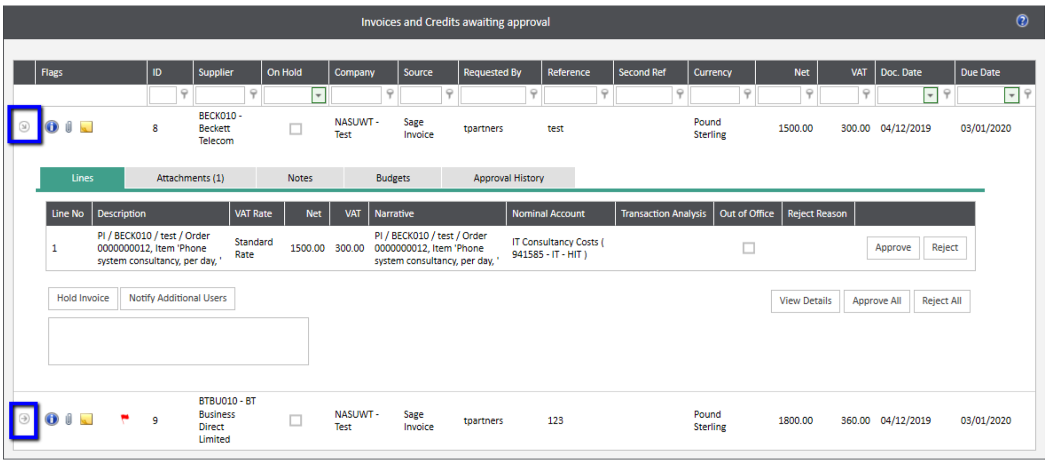
WAP PO order number. No orders should be placed with a supplier without a WAP PO number to avoid this situation

7.1 How to authorise an invoice

To approve an invoice you will can either click the link from the email, or select Approve Invoices from the Invoices menu.



To see the detail of each invoice, click the arrow

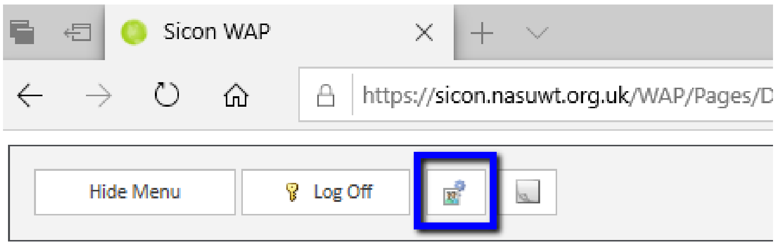


From here you can approve individual lines if applicable, or approve all.
You can also reject the invoice. You will need to enter a rejection reason. You should only do this if the goods are not being received due to fault or issue with the supplier. DO NOT SELECT THIS IF YOU ARE AWAITING A RESOLUTION.
In this case click Hold Invoice. You will need to enter a reason why you are holding the invoice.
If the invoice has been passed to you, but you are not the budget holder, you should reject the invoice, stating you're not the budget holder. This will be passed back to Finance for reallocation.

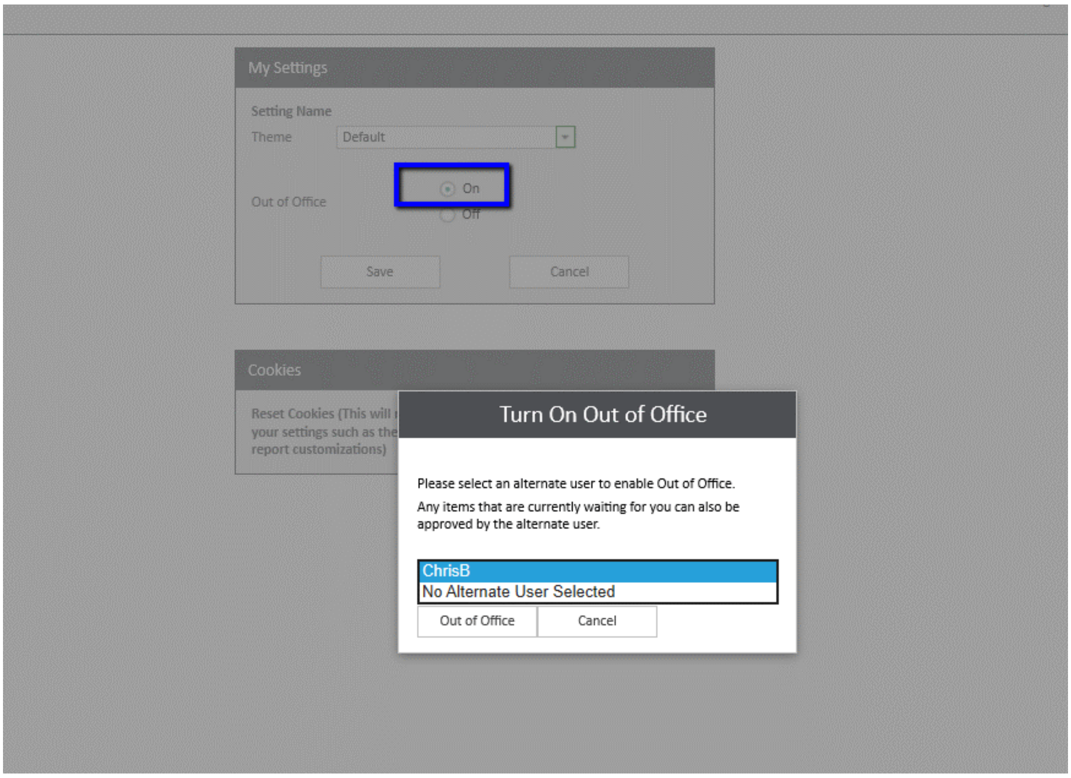
8 Out of Office

All requisitions and invoices will follow a pre-determined route depending on the nominal code used. Due to this, if you're going to be on annual leave you will need to switch on your Out of Office for WAP. If you don't, all requisitions and invoices will halt with you.

To switch on your Out of Office, click on the cog icon at the top of WAP.



You can now select On for Out of Office and your list should identify who can act as your stand-in.



This will route all new requisitions and invoices directly to your alternate user.

9 Request a new supplier

Notes on this will be updated soon.