wiise

Wiise Purchase Requisitions

How to set up and use Wiise Purchase Requisitions

Our October release introduces our brand-new feature, Wiise Purchase Requisitions. Learn how you can set up and use Wiise Purchase Requisitions in this article.

Version	Author	Date	Comments
1	Carl Brooks	19/10/2022	Initial document creation

Introduction to Wiise Purchase Requisitions

Wiise Purchase Requisitions allows an organisation's employees to create a request for the purchase of goods or services without needing to use clunky online forms or error-prone manual methods.

Requisitions are sent to an approver for review using Wiise workflows, allowing an organisation to have full visibility into internal purchases. Approved requisitions automatically raise purchase orders for posting, which speeds up the process of buying goods and services.

To use Wiise Purchase Requisitions, you will need a Wiise Team member license or higher.

The following sections will take you through the set up and usage instructions for Wiise Purchase Requisitions.

How to set up Purchase Requisitions in Wiise

To start using Wiise Purchase Requisitions, you need to set up approvals. Approvals determine who approves purchase requests.

1 Search 'approval user setup' to go to the **Approval User Setup** page.
2 Create a new line and select the **User ID** of the employee who can create a purchase requisition.
3 Under **Approver ID** specify the approver who will need to review the requisitions made by the employee you just added.
4 Only employees who have the **Purchase Request Approval** checkbox under their **User ID** ticked are able to be approvers.

Note: To set up users and approvers in **Wiise Purchase Requisitions**, you need access to the Approval User Setup page.

How to create a requisition

Here's how to create a new purchase requisition:

1   From the Wiise home page or Role Center, select **Purchasing > Purchase Requisition** to go to the **Purchase Requisition Worksheet** page.
2   Start a new line and update the following fields:
    - Item No
    - Quantity
    - Unit of Measure Code
    - Location Code
    - Priority

    Note: Please see the note on Direct Unit Costs in our FAQs document.

3   If the purchase requisition relates to specific dimensions, select **Line > Dimensions** from the top navigation bar and select any dimensions that apply such as e.g. Department or Area.
4   Select **Line > Comments** from the top navigation bar to enter any additional comments for the approver here.
5   When the requisition is ready, select the worksheet line, then select **Request Approval** from the **Request Approval** tab in the top navigation bar to submit the requisition.
6   Select multiple lines from the worksheet to submit more than one requisition for approval.

What happens next?

- When a user submits a requisition, the status of the worksheet line will change from New to Requested.
- Wiise will notify the approver and a new action tile titled Purchase Req Request to Approve will appear on the approver's Role Center.
- The user who made the requisition will be able to track the status of the purchase requisition at any time from the worksheet.

How to approve a requisition

Here's how users can review and approve purchase requisitions.

1 From the Wiise Role Center, select **Purchasing > Purchase Requisition Approval** to go to the **Purchase Requisition Approval** page.
2 Select **Line > Comments** from the top navigation bar to add any comments.
3 Select **Approval** from the top navigation bar and choose **Approve** or **Reject**.

Note: Approvers will be able to review requisitions based on their priority. It's also possible to approve or reject multiple requisitions at a time.

What happens next?

When a purchase requisition is **approved**:

1 The status of the requisition changes to **Approved**.
2 One or more purchase orders is then created in Wiise, grouped by vendor.
3 The user who created the requisition is notified that their request has been approved.
4 These purchase orders are now ready to be invoiced following your usual Accounts Payable process.

When a purchase requisition is **not approved**:

1 The status of the requisition changes to **Rejected**.
2 The user who created the requisition is notified that their request was not approved.
3 Users have the option to make corrections to a rejected request and resubmit for approval.
4 To do this, select **Reopen Request**, make the updates, and select **Request Approval** to resubmit.
5 You will see that the status of this request will change from **Rejected** to **New**.

How to archive a requisition

Users can archive previously submitted requisitions to reduce the number of entries on the main **Purchase Requisition Worksheet**.
From the **Purchase Requisition Worksheet**, select the purchase requisitions you no longer need to action or follow.

1 Select **Process > Archive Purchase Request** from the top navigation bar to archive selected entries.