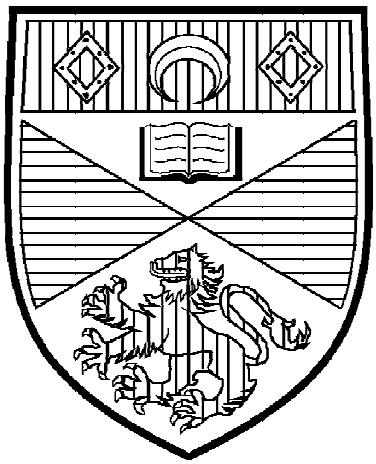

University
of
St Andrews

Finance Department
Aptos9 User Notes

Web Requisitioning

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Change History

Version	Date	Author
1	09 May 2005	Karen Porteous
2	06 October 2005	Karen Porteous
3	01 December 2005	M Woodcock-Kroble
4	08 December 2005	Karen Porteous & M Woodcock-Kroble
5	04 May 2006	M Woodcock-Kroble
6	9 June 2006	M Woodcock-Kroble
7	22 January 2007	Karen Porteous
8	13 February 2007	Karen Porteous
9	12 March 2007	Karen Porteous
10	27 November 2009	Ian Fowler
11	31 August 2011	Neil Sinclair

1. Aptos Web Services – Overview

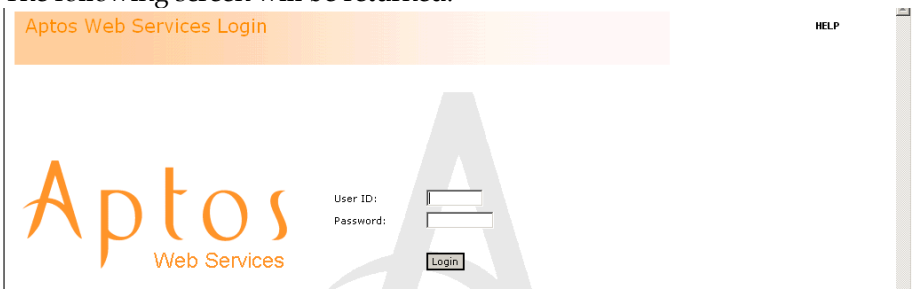
Aptos WEB allows some core functions to be accessed in a user-friendlier format, saving occasional users from having to learn the full product.

The main use of the Aptos web services within the University is the web requisitioning functionality. This sub-module allows requisitions to be raised – either for internal goods or for external orders placed through a marketplace (our current marketplace is Parabilis). External orders not being placed via the marketplace should be raised within the Aptos core system (see Purchase Ordering notes).

1.1. Accessing Aptos Web Services

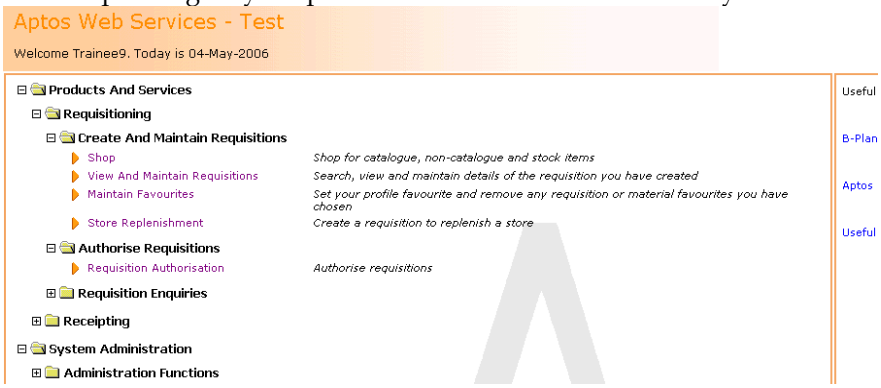
- To access Aptos web enter the following URL into your browser:
  - **test** system http://www-aptos/ATE/wrd/run/aws1001
  - **live** system http://www-aptos.st-andrews.ac.uk/ALI/wrd/run/aws1001

The following screen will be returned:



- Enter your username and password for Aptos-web.
- Click LOGIN.

You will then be presented with the web services menus. These may differ from other users depending on your particular access to and use of the system.



1.2. Navigation in Aptos-web

When using Aptos-web:

- **Do use** the navigation buttons WITHIN the web application.

These buttons can be found at the top-right of the application screen and change according to the screen in use e.g:

-

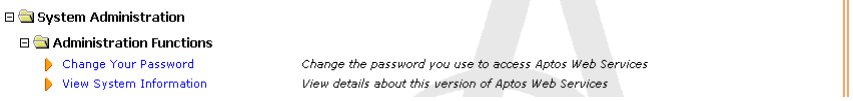
Do not use the navigation buttons of your web browser. e.g.

Often, unexpected effects occur if you do. (Some browsers allow this toolbar to be hidden from view altogether.)

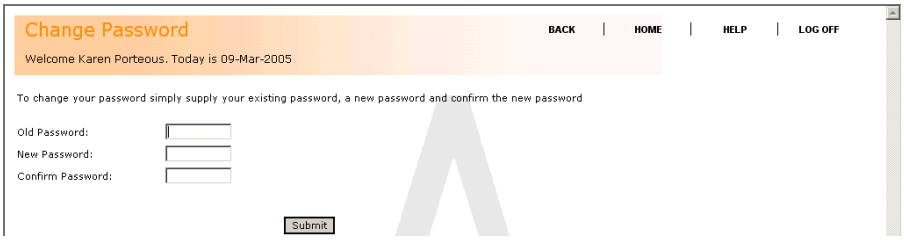
1.3. Password Maintenance

Your web services password and your core aptos password (if you have one) are now identical. Changing one will automatically change the other.

The Web Services menu page reached in section 1.1 contains a 'System Administrator' menu part way down the page:



- Click the 'Change Your Password' option to give:

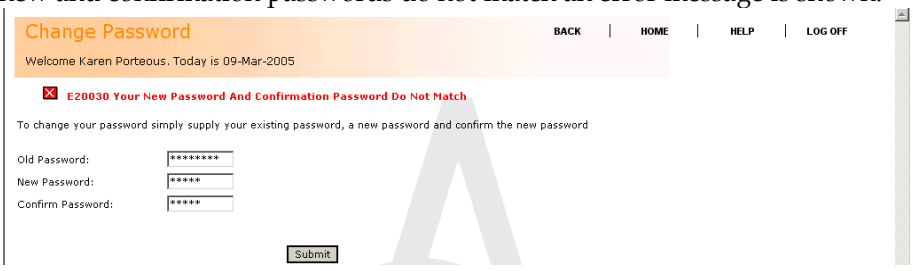


- Enter your old password
- Enter your chosen new password
- Enter your new password again (just to check what was typed)
- Click the SUBMIT (Submit) button.

The screen refreshes and lets you know if the password change has been successful or not.

1.3.1. Unsuccessful Password Change

If the new and confirmation passwords do not match an error message is shown:

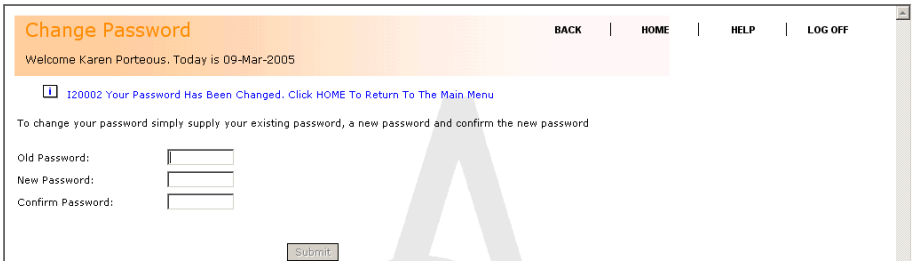


To try and change your password again:

- Re-enter your old and new passwords, and click submit - as before.

1.3.2. Successful Password Change

If the new and confirmation passwords match a confirmation message is shown:

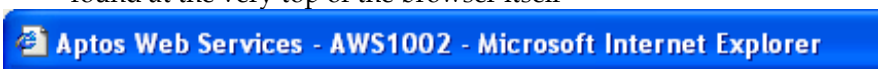


- Return to the main web services page by clicking the HOME (HOME) button.

1.4. Reporting a problem

Generally, 'good messages' are shown in blue text and errors are shown in red text.

- Please contact aptospom@st-andrews.ac.uk providing the following:
  - The screen number for the screen on which you first noticed the problem. This is found at the very top of the browser itself



  - The message, including the E number. This usually appears under the page header:

  - A full description of the problem, including the steps you worked through to get to the stage where things 'stopped behaving'

Providing all this information allows us to investigate your query fully.

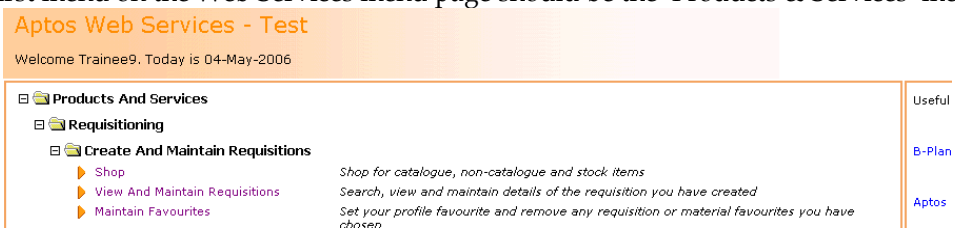
Note: We can only assist with Aptos queries. The Aptos pages all have the orange-to-white gradient header at the top of them.

2. Creating a Requisition

2.1. Create/Select a Basket

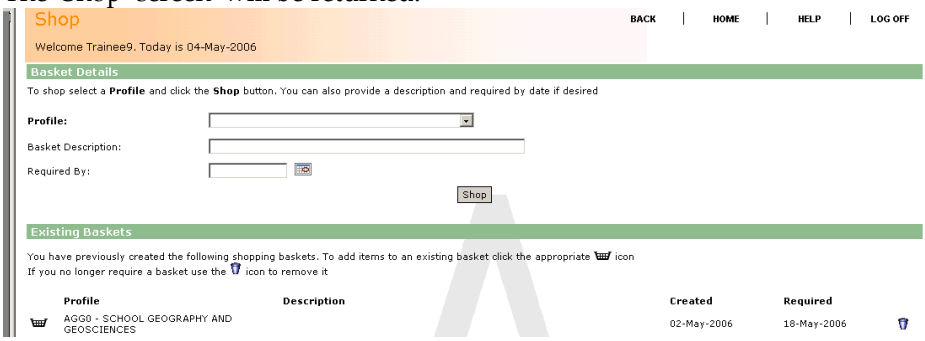
To get started you need a basket. You can either create a new one or use an existing basket you may have been working on.

The first menu on the Web Services menu page should be the 'Products & Services' menu:



➢ Click on:
Products and Services – Requisitioning – Create and Maintain Requisitions - Shop

The 'Shop' screen will be returned:



- The 'Basket Details' part of the screen allows you to create new baskets
- The 'Existing Baskets' section of the screen displays any unused baskets that you may have on the system, allowing you to open them and add more items before creating a requisition from the basket.

2.1.1. Create a New Basket

➢ Select a profile from the 'Profile' drop-down in the 'Basket Details' section of the screen.
➢ Enter a description to help you identify the basket
➢ Enter a 'required by' date
➢ Click the 'Shop' button

2.1.2. Select an existing basket

This is particularly useful if you've been interrupted while creating a requisition.

➢ Click on the basket icon next to the basket you want to add to, in the 'Existing Baskets' section of the screen.

2.2. Basket Detail (Requisition Lines)

The following local policy must be followed:

➢ Create a different requisition for stock items, internal service items, marketplace orders, or non-catalogue items.
This ensures that each Aptos requisition number refers to a single order.

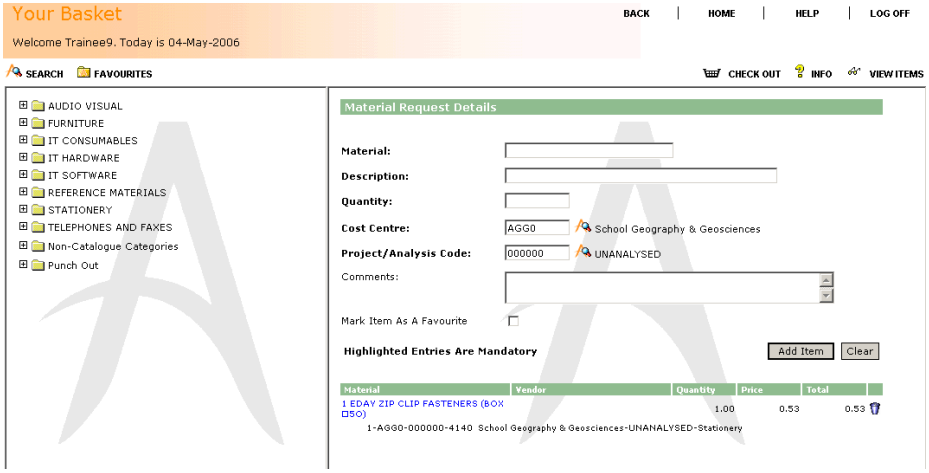
2.2.1. Adding Lines for Aptos Materials

On the left side of the screen you will see several folders representing material groups. Within each are sub-folders representing material subgroups and within these are actual materials:

- Stock products are represented by the icon.
- Non-stock products are represented by the icon.
- Internal service products are represented by the icon

Although Aptos will allow 'mixed' requisitions reconciliations are easier if different requisitions are entered for different jobs. In the case of internal services this also allows jobs to be progressed independently where more than one has been placed with the same service provider.

On the right hand side of the screen lies the basket detail itself.



➢ To start a line, enter all required information marked in bold below:

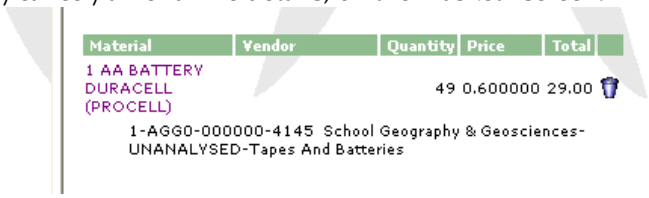
Material:	➢ Browse the folders on the left to select the material (see section 7.1 for searching for materials)
Description:	This will be populated automatically. If a stock material is selected, the current stock and order levels will be shown.
Quantity:	➢ Enter the quantity required. Note unit of measure is displayed
Cost Centre:	If shown, this is a default for the profile ➢ overwrite ONLY if appropriate – see section 9. If this does not appear, the profile forces a cost centre.
Project/Analysis code:	If shown, this is a default for the profile ➢ overwrite ONLY if appropriate – see section 9. If this does not appear, the profile forces a project/analysis code.
Comments	➢ Use this to provide further information on the item to the authoriser and/or buyer. Will not pass to supplier.
Mark Item As A Favourite:	➢ If desired, tick to mark the individual item as a favourite. Items marked as favourites can be seen by selecting the FAVOURITES folder – useful for frequently ordered items.

Click one of:

- ADD ITEM (Add Item) to add the details, thus completing the line.
  If no price exists for the material a price prompt will be shown
- CLEAR (Clear) to start the line again.

➢ To add more items/lines to your basket, repeat the previous steps for starting and finishing lines.

It is possible to view/cancel/amend line details, on the 'Basket' screen:

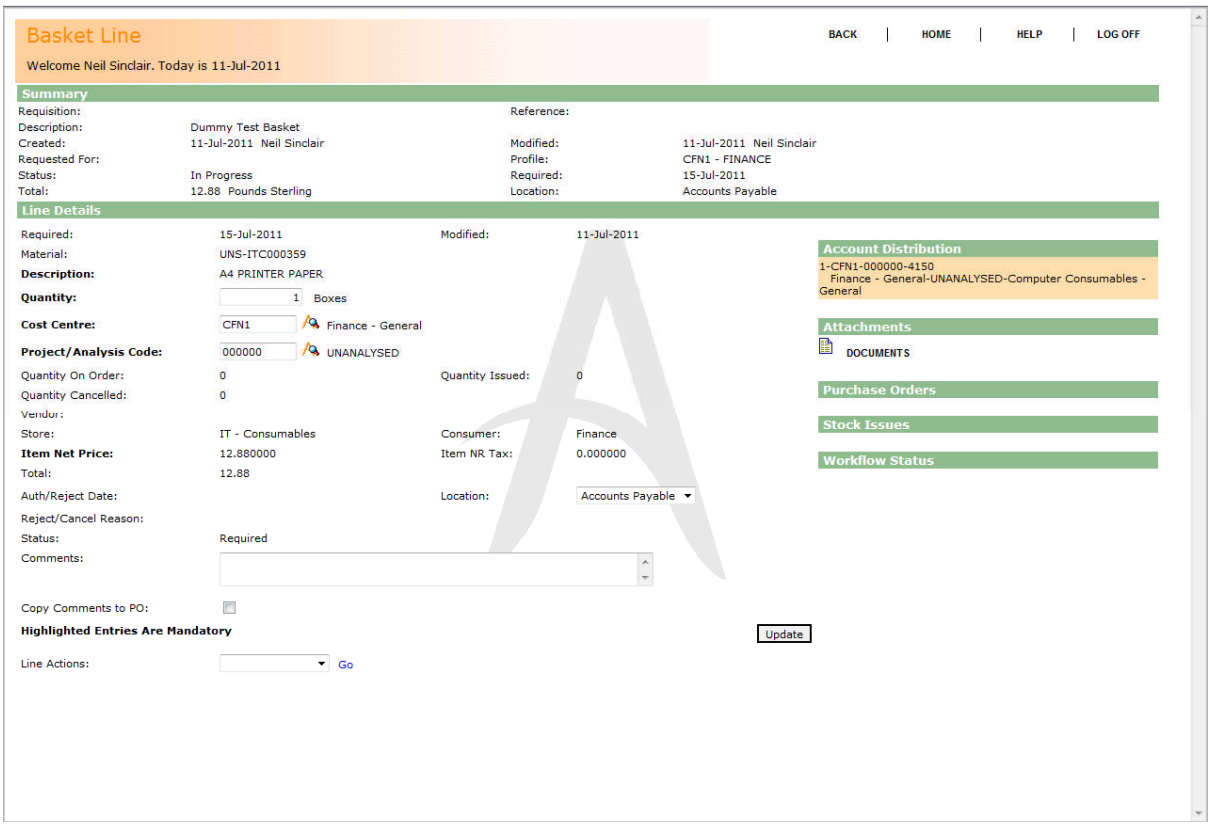


➢ To delete a line, click the trash can on the appropriate line.

Alternatively, if you want to amend quantities or codes:

➢ To select an item, click on the item link in the 'Material' column of the list of items you've already added.

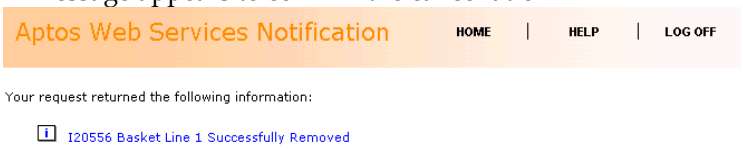
This returns the 'Basket line' screen, with the basket header and the full details of the item which you selected.



From here, lines can also be removed if necessary but additional lines cannot be added:

- Select REMOVE from the 'Line Action' drop down list.
- Click GO.

A message appears to confirm the cancellation



- Click HOME (HOME)
- Select the basket you were working on (see section 2.1.2 - Select an existing basket).
- Continue adding / amending lines as required
- Finish the requisition off in the usual manner

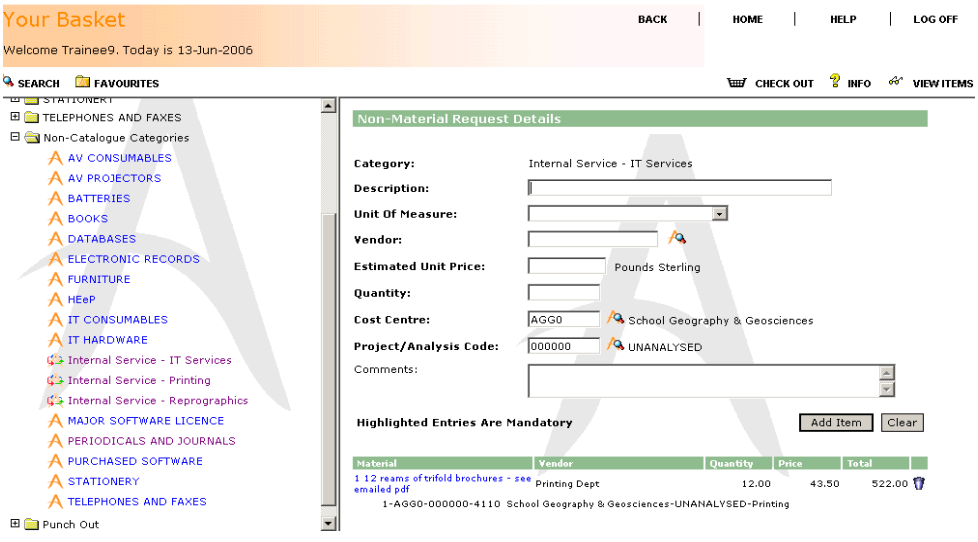
2.2.2. Lines for Non-Catalogue Category Items

On the left side of the screen there is a folder called 'non-catalogue categories'. There are two types of 'non-catalogue' materials:

- Externally provided categories are represented by the icon.
- Internal service products are represented by the icon

Although Aptos will allow 'mixed' requisitions reconciliations are easier if different requisitions are entered for different jobs. In the case of internal services this also allows jobs to be progressed independently where more than one has been placed with the same service provider.

- Click the 'Non-Catalogue Categories' folder in the left hand menu



- To start a line, click to select the category relevant to the item being purchased

Each category is associated with a detail code for the item.

- Enter all required information marked in bold below:

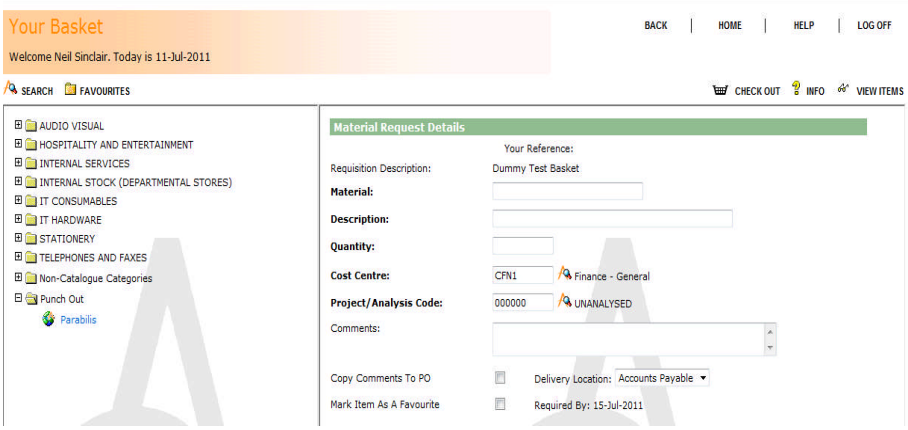
Description:	➢	Enter an appropriate description for the line.
Unit of Measure:	➢	Select from the drop-down menu.
Vendor:	➢	Enter the vendor code, if you know the supplier of the item (this will always be known for internal services and must be entered). ○ Click the next to the field, to bring up a list of vendors (the list will be different if the item is marked as internally provided) ○ Select the correct vendor for the item
	➢	Otherwise leave blank.
Estimated Unit Price:	➢	Enter an estimated price of the item for externally provided items
	➢	Enter the **pre-agreed** price of the item for internally provided items.
Quantity:	➢	Enter the quantity required.
Cost Centre:	If shown, this is a default for the profile ➢ overwrite ONLY if appropriate – see section 9. If this does not appear, the profile forces a cost centre.	
Project/Analysis code:	If shown, this is a default for the profile ➢ overwrite ONLY if appropriate – see section 9. If this does not appear, the profile forces a project/analysis code.	
Comments:	Can be used to provide further information to the authoriser and/or buyer. Will not pass to supplier.	

- At this point, either:
  - Click the ADD ITEM (Add Item) to add the details, thus completing the line.
  - Click CLEAR (Clear) to start the line again.

- Repeat the above steps to add more items/lines to your requisition

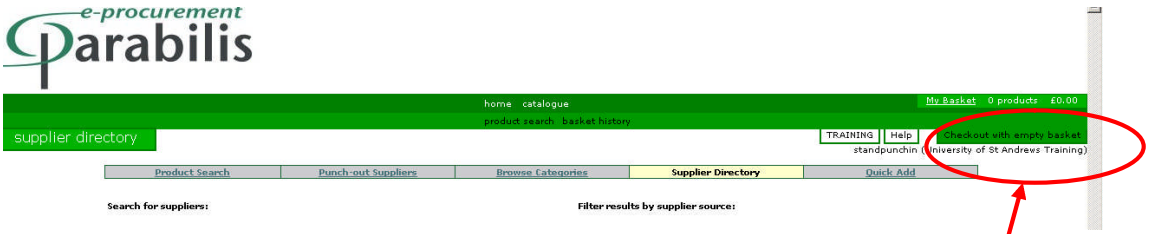
2.2.3. Lines for Parabilis Orders

On the left hand side of the screen the folder at the bottom of the list is called 'Punch Out':



- Open the Punch out folder
- Click on Parabilis (the word rather than the icon is the hyperlink).

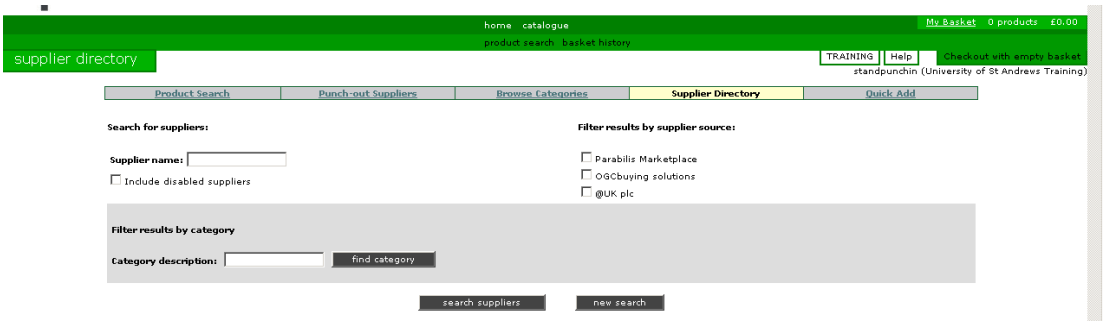
On clicking Punch Out, the following screen will be returned:

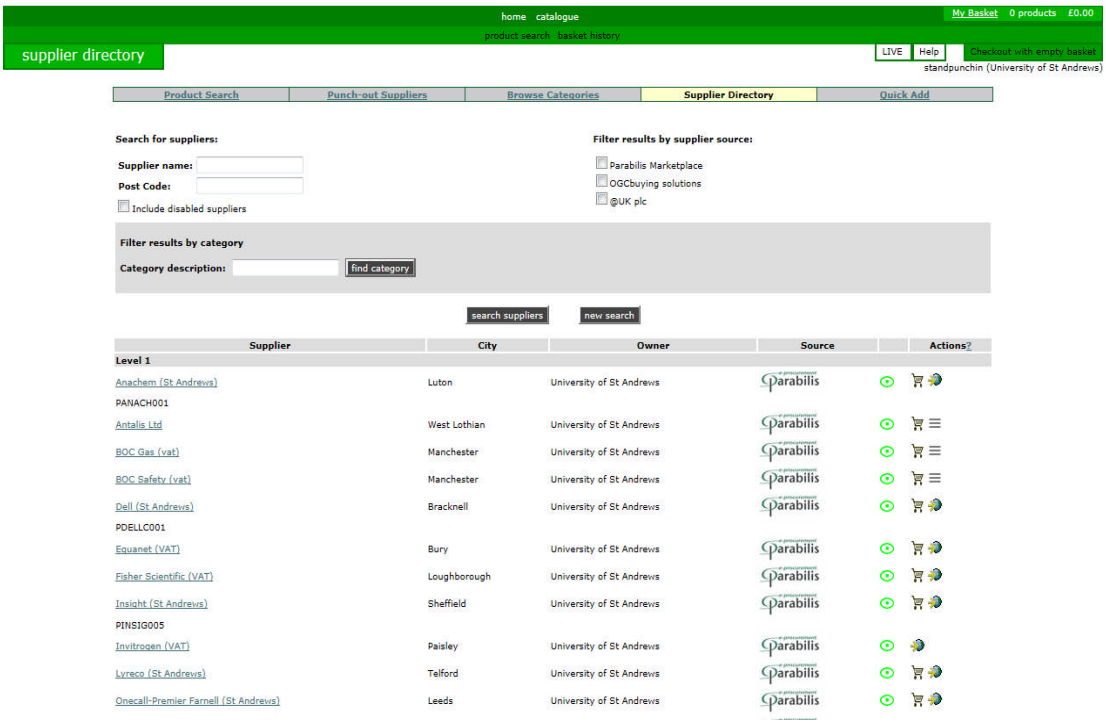


Note you can return to Aptos at any time without completing the order by choosing the 'checkout empty basket option' from the 'my basket' link.

To raise an order against a specific supplier.

- Click the 'search suppliers' button.



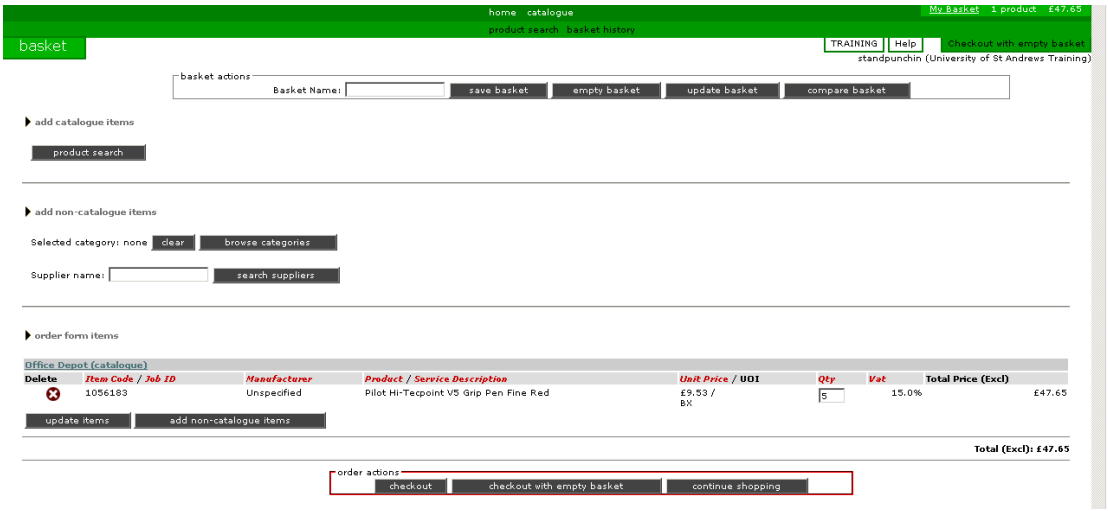


- Click the arrow and globe or the horizontal lines at the end of the line for the supplier you want to use.

You will be redirected to the suppliers own site or a catalogue page for their products.

- Add the required items to your basket
- Follow the appropriate checkout process when you have completed your requisition.

Before checkout is completed, the marketplace will intercept the order and return the user to an intermediate marketplace basket page:

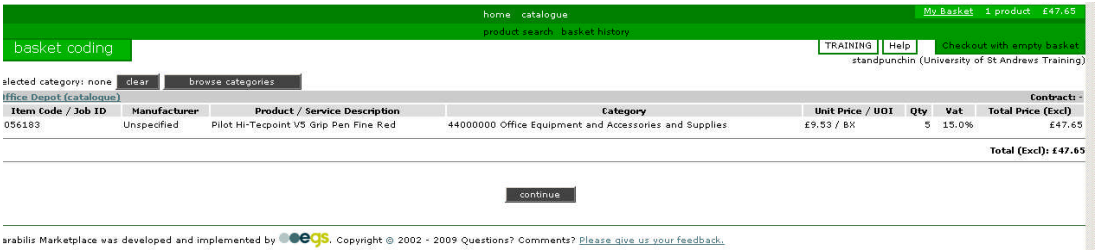


There are a couple of changes you can make on this screen, if necessary:

- Correct any line quantities
- Remove any unwanted lines, by clicking the red cross at the start of the relevant line.

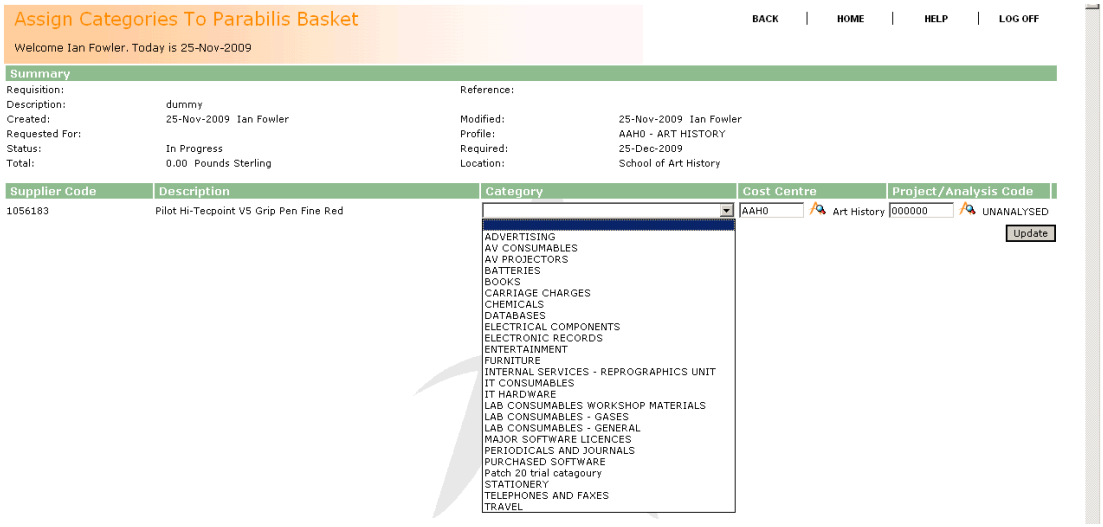
Once your basket is ok:

- Click the 'check out' button



- Click the 'continue' button.

You are finally brought back through to Aptos.



- If the category field is blank, select the appropriate category from the drop-down list to tell the system which product category the item belongs to.

  You should only have to do this if this the first occasion a particular product has been purchased, by anyone at the University.

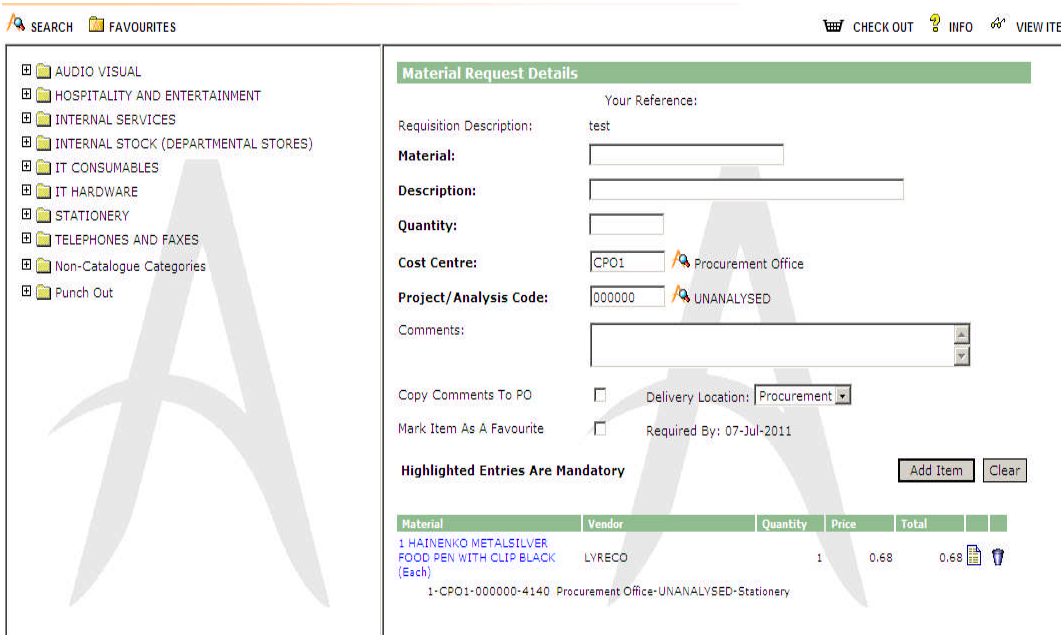
  This can also be used to correct the category, if an item has obviously been incorrectly assigned, e.g. if a laser-printer has been marked as belonging to the BOOKS category…

- Cost centre and Project/analysis codes:
  - If either/both of these are shown, these are defaults for the profile – overwrite if appropriate – see section 9.
  - If either/both don't appear, the profile forces the appropriate Cost centre and/or project/analysis code.

When you have checked all lines have been assigned to categories, and cost centre and/or project/analysis code amendments are completed:

- Click UPDATE (Update), to update the requisition.

  You are then returned to the 'Your Basket' screen:



Note that line descriptions and prices are those from the supplier's own web site and that the vendor name is displayed.

2.2.3.1. Limitations of Marketplace Orders

The following local policies must be followed:

- Use **one** marketplace session per **single** vendor.
  This ensures that each Aptos requisition number refers to a single vendor.
- Do not use the marketplace for orders where it is necessary to send a vat certificate.
- Store managers wishing to replenish stock via Parabilis need to refer to section 3.1 (Stock Replenishment through Parabilis) to ensure the order is coded correctly.
- Do not use the copy requisition functionality in conjunction with the marketplace. If you try this, the PO will not be sent as it will not be recognised by the marketplace.

2.2.3.2. Problems with the Marketplace

Any problems with marketplace suppliers' sites, or the marketplace pages themselves should be directed to Procurement:

- Either email procurement@st-andrews.ac.uk
- Telephone: 2523
- Or refer to the "Parabilis Hints & Tips" document available at http://www.st-andrews.ac.uk/media/Parabilis_hints_and_tips.pdf

2.3. Checkout

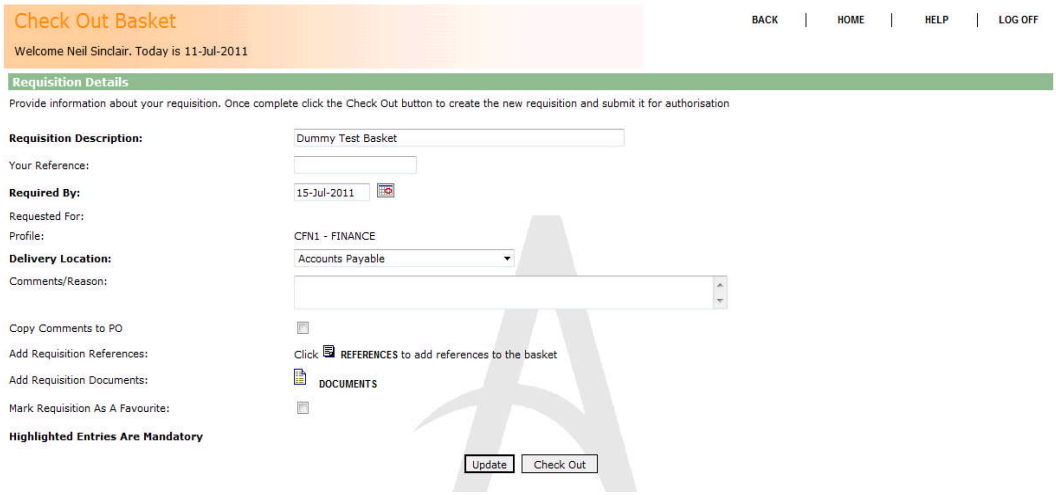
When you've added all the items you want to your basket, you need to check it out to create the requisition. The checkout process automatically:

- Converts the basket to a requisition
- Sends the requisition for authorisation

Note: Once a basket has been checked out, it can no longer be added to or altered in any way.

- Click the CHECKOUT (CHECK OUT) icon.

The 'Check Out Basket' Screen appears:



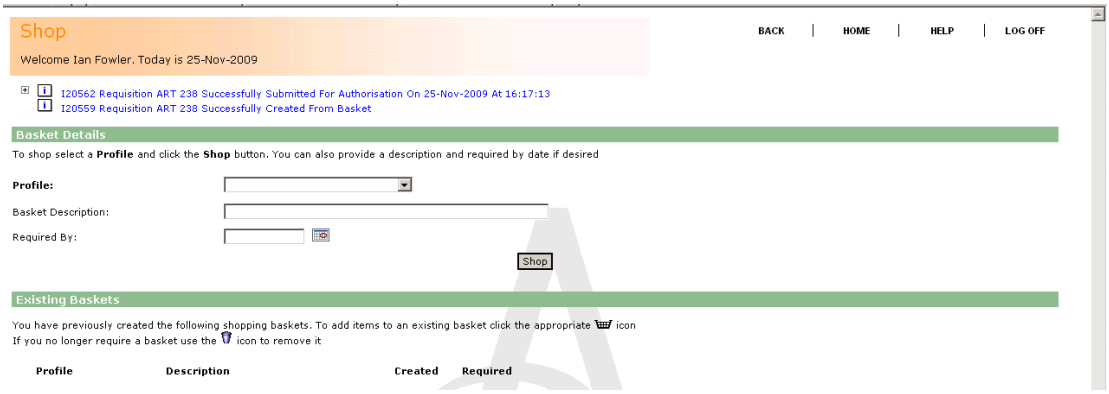
- The information entered on the header applies to the entire requisition
- The fields with bold names are mandatory whereas the others are optional.
- The description and reference fields can be used for searching.

- Enter all required information marked in bold below.

Requisition description:	➢ Enter a description for the requisition This is where you can alter the one you entered when creating the basket
Your reference:	➢ Use to quote an account number (Field is used to populate the 'Title' field on the PO created from an marketplace requisition)
Required by:	➢ Enter a date when the order is required by. ○ To use the date picker click on the calendar icon ( )
Requested for:	➢ Do NOT use this
Profile:	➢ Select the profile to use if more than one is shown
Delivery Location:	➢ Select an alternative delivery location if allowed to do so and ONLY if it is appropriate. If you require an amendment to a delivery location address or a new delivery location is required e-mail aptospom@st-andrews.ac.uk with details
Comments/Reason:	Use this to provide further information to the authoriser and/or buyer. Will not pass to supplier.
Attach Requisition Document:	Only use if required. Will not become part of the order but may assist the authoriser.
Mark Requisition As A Favourite:	Tick to mark the whole requisition as a favourite

- Click the checkout (Check Out) button to complete the requisition

You are returned to the 'Shop' screen:



Two messages appear at the top, confirming the successful creation of a requisition and its submission for authorisation.
You may find it useful to note the requisition number down.

Note:

- The requisition now has to be authorised, before the system transmits it to the appropriate store manager or external supplier.
- Requisition documents attached to the requisition will not be passed to the supplier, store manager or internal service provider

3. Special Cases of Web Requisitions

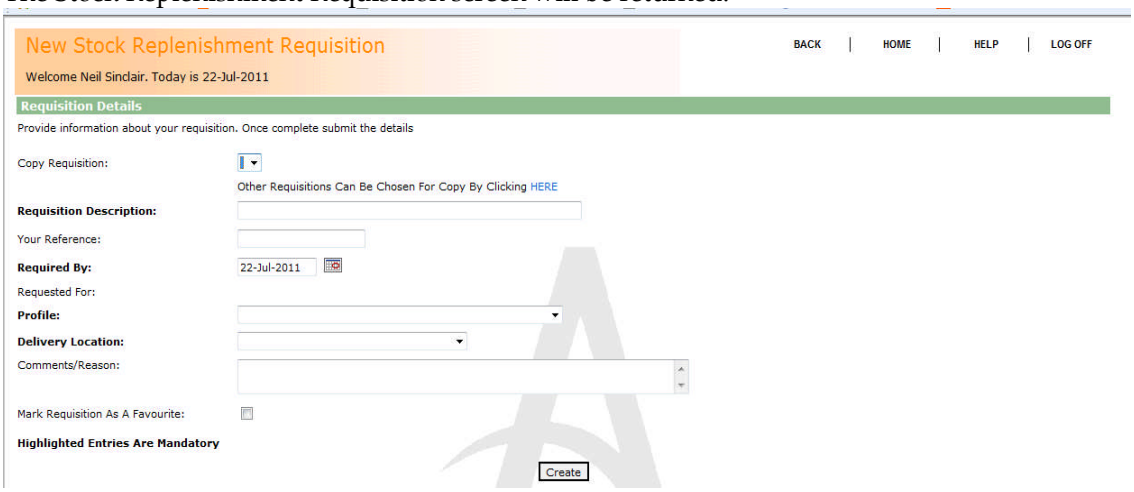
3.1. Stock Replenishment through Parabilis

This only applies to Store Managers and can only be used when the purchase order of measure is one which can be mapped to the marketplace. In practice this really means it can only be used where the purchase unit of measure is each.

- Click on:

Products and Services – Requisitioning – Create and Maintain Requisitions – Store Replenishment

The Stock Replenishment Requisition screen will be returned:



- Enter all required information marked in bold below.

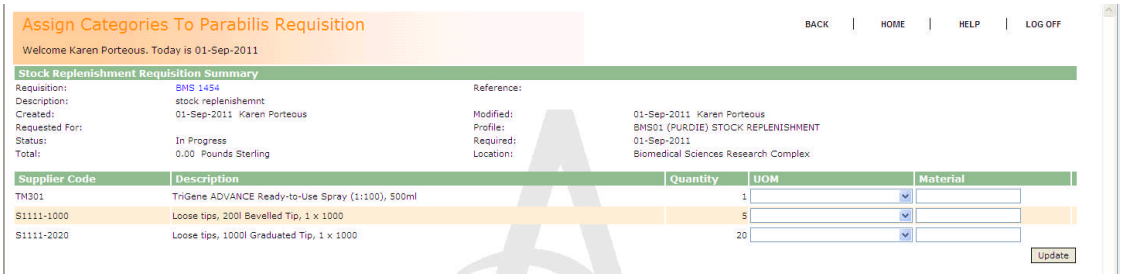
Requisition description:	➢ Enter a description for the requisition
Your reference:	➢ Use to quote an account number (Field is used to populate the 'Title' field on the PO created from an marketplace requisition)
Required by:	➢ Enter a date when the order is required by. ○ To use the date picker click on the calendar icon ( )
Requested for:	➢ Do NOT use this
Profile:	➢ Select the appropriate Stock Replenishment profile for your store
Delivery Location:	➢ Select an alternative delivery location if allowed to do so and ONLY if it is appropriate.
Comments/Reason:	➢ Use this to provide further information to the authoriser and/or buyer. Will not pass to supplier.
Mark Requisition As A Favourite:	➢ Do NOT use this

- Click the create button

The requisition screen is returned

- Create your requisition as per section2.2.3 Lines for Parabilis Orders

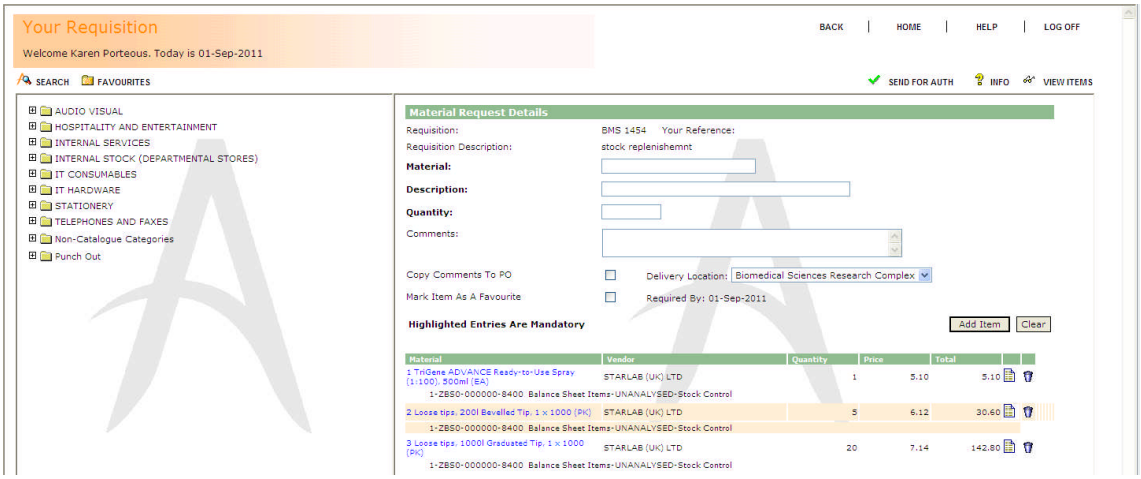
Follow exactly the same steps until you return to Aptos where a slightly different screen is displayed



- Select EACH as the Unit of Measure for each item
- Enter the appropriate stock code for each item

- Click UPDATE (Update), to update the requisition.

You are then returned to the 'Your Requisition' screen:



Note that line descriptions and prices are those from the supplier's own web site and that the vendor name is displayed.

- Click the "send for auth" button (SEND FOR AUTH)

The 'Aptos web services notification' screen appears

A message can be seen at the top confirming the requisition has ben submitted for approval

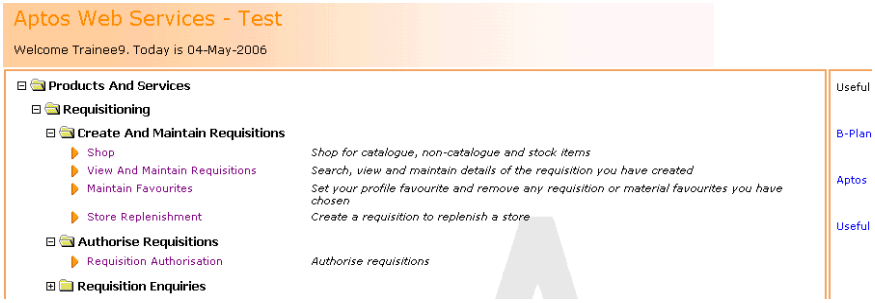
Note:

- The requisition now has to be authorised, before the system transmits it to the external supplier.

- Click HOME (HOME)to return to the main screen

4. Requisition Authorisation

After a requisition has been submitted for approval, the workflow model directs it to appropriate approver(s) based on the cost centre(s) the lines are coded to. It should take a maximum of 5 minutes to progress through the workflow model and appear on the authorisers screen. Each cost centre has multiple approvers at each level but it is only necessary for one of the listed approvers to actually approve the requisition to then allow it to progress to the next stage:

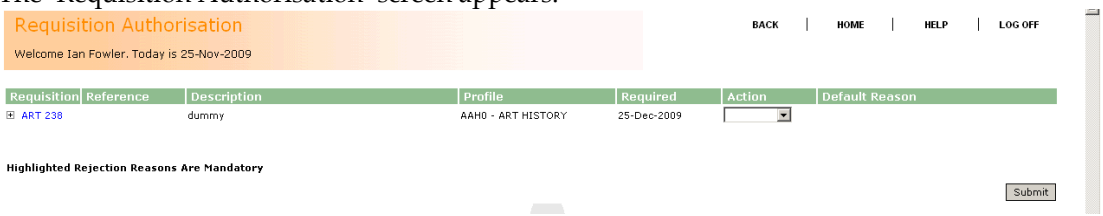


For authorisers, on the Web Services homepage:

- Click on:

Products and Services – Requisitioning – Authorise Requisitions – Requisition Authorisation

The 'Requisition Authorisation' screen appears:



For each Requisition, you can choose to either:

- Authorise, or cancel the whole requisition at header level.
- Authorise, or cancel different lines of the requisition at line detail level.
  - To see the line details of any requisition awaiting authorisation, click the expand (⊞) icon.
  - If you choose actions at line level, when you have the requisition expanded, you **must** choose an action for every line in the requisition.

Whether at header or line detail level:

- Select either 'Authorise', or 'Cancel' in the 'Actions' drop down menu.
  - If a line isn't correct, choose Cancel rather than Reject, and ask the person who raised the requisition to order the items again with appropriate amendments. This allows the rest of the requisition to proceed.
  - Do NOT use the 'Reject' option at line level, as this will stall the rest of the requisition until the rejected line has been actioned by the requisitioner.

- Enter a reason if you cancel a requisition header or line.

- Click the SUBMIT (Submit) button, once you have selected the action(s) for the requisition you are dealing with.

  The requisition now moves forward through the workflow model.

4.1. Workflow - What Happens Next?

The status of a requisition and/or its individual lines may be viewed through 'View and Maintain Requisitions' (Section 5).

If a requisition fails financial approval, the status of the requisition will show as 'Cancelled'. After discussion with the financial approver in your department, you may wish to redo the requisition with appropriate amendments.

Once a requisition has successfully completed all appropriate levels of financial approval, the requisition status will normally change to 'Approved' (apart from Internal Services requisitions). The requisition is then passed on to the next stage in the process. What happens is dependent on the type of requisition you placed.

4.1.1. Stock Items

A requisition for a stock item will be routed to the appropriate store manager.

The store manager will then issue the goods and send them to the delivery address chosen in section 2.3. The charge for the goods will automatically take place on issue. No further action is necessary by the requisitioner. The requisition number will be shown on the Finance transaction reports so the charges can be identified.

4.1.2. Internal Services

On approved requisitions, the requisition header status remains as 'Submitted for Authorisation' but the workflow messages against the individual requisition lines will indicate they are awaiting 'service provider approval'. This means the requisition has been sent to the internal service provider.

Service provider approval

This allows the service provider the opportunity to accept or decline the task at the value approved by the financial approver.

If the service provider accepts the task, the requisition header status changes to 'approved' and each requisition line will now have a workflow message of 'awaiting service provider action'.

If the service provider rejects the task, the requisition header status changes to 'Rejected' as does the requisition line status. Drilling down on the requisition line 'material' allows you to see the reason for rejection. The requisition can now be amended. The requisition will have to be submitted for approval again and it will go back through both the financial approval and service provider approval routines.

Service Provider Action

At this – final – stage, the service provider is given a last opportunity to reject the task. However, they should only to this in extreme circumstances and after communicating the situation fully. If they do, the requisition header status will appear as 'Approved', and the line status will be 'Rejected'. You can amend the requisition as described earlier.

The service provider should now carry out the requested task. Once they have they complete the task in Aptos and this then creates a voucher the internal vendor (service providers cost centre) and debiting the code from the requisition. The status of the requisition will change to 'completed' at both header and line level.

4.1.3. Marketplace requisitions

A marketplace requisition is automatically converted into an approved Aptos purchase order.

The order is identical to an order created in core Aptos BUT it does not need to be sent to the supplier as it will automatically be transmitted via the marketplace. The purchase order number can be seen in the requisition line screen (see section 5.1). When the goods are delivered, the purchase order must be receipted either within core (see Purchase Ordering notes) or within web services (see section 6) to allow the invoice to be paid.

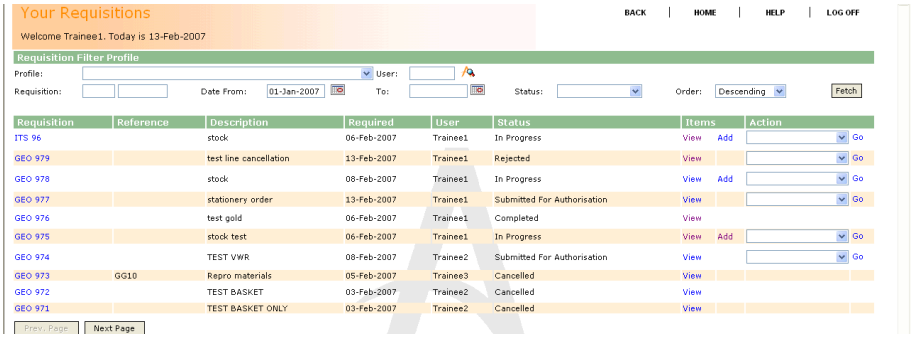
4.1.4. Non-Catalogue Category Items

A non-marketplace, non-stock requisition will be routed to the default buyer for the cost centre so the buyer can convert the requisition into an order within core Aptos.

5. Viewing Requisitions

It is sometimes necessary to view a requisition to find out what it was for.

➢ Click on:
Products and Services – Requisitioning – Create and Maintain Requisitions - View and Maintain Requisitions



- This screen allows the user to see requisitions within the profile selected.
- Users can only view requisitions from within profiles they have access to.

Additional filters may be applied:

- By default, the users own ID is populated in the user field filter but this can be overwritten or blanked.
- Change the default status from 'in progress' to blank (above 'in progress'), to find all requisitions or if you don't know the requisition status.
- When using the 'Date from' filter, this actually means the date you *started* the basket used to create the requisition, NOT the date you checked out!

Depending on the requisition status, different options may be available in the 'items' column and actions drop-down menu. Aptos will only show the allowed options for each requisition.

5.1. Items column

Items column – add

This allows lines to be added to a requisition:

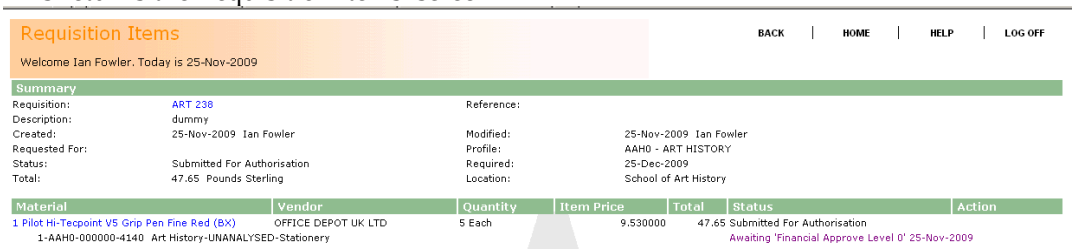
➢ Click ADD to the right of the requisition (this returns you to the 'basket details' page covered in section 2.2).

Items column – view

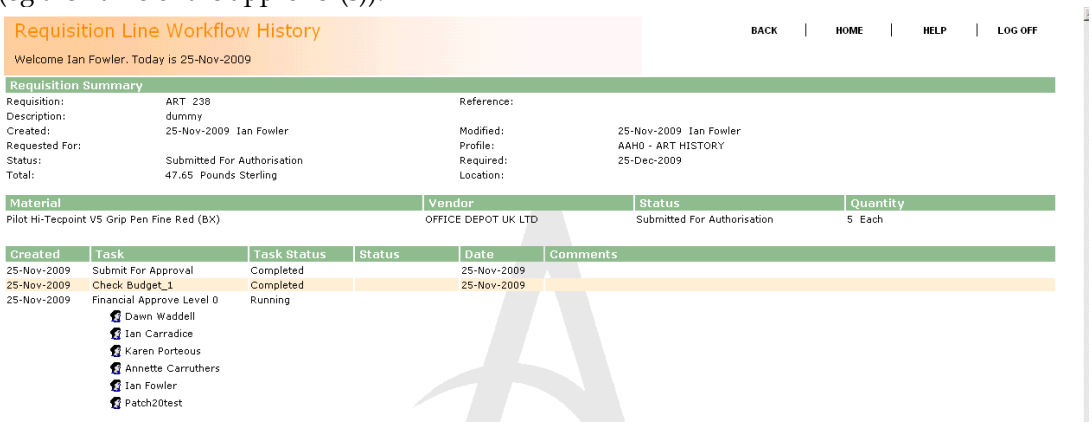
This allows you to view the requisition and associated details:

➢ Click VIEW to the right of the requisition

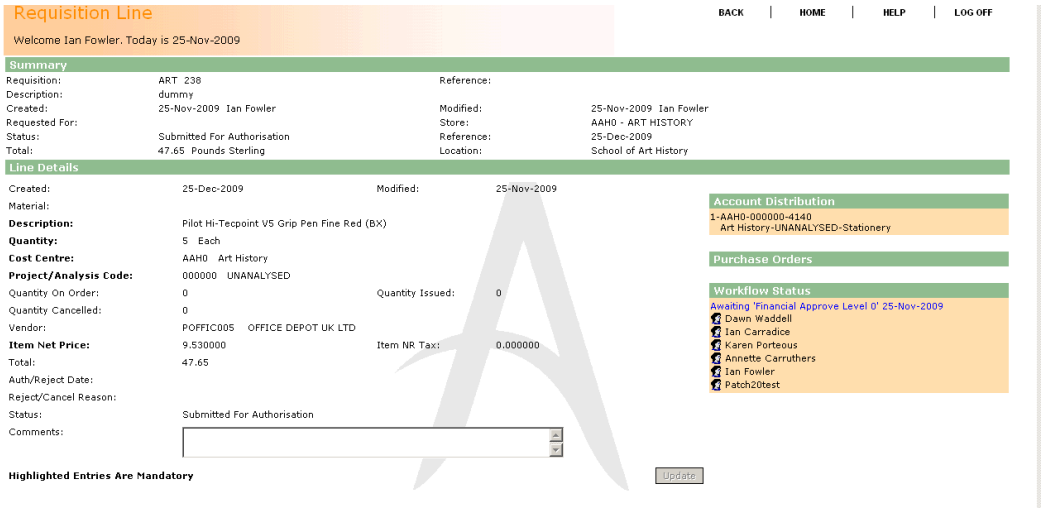
This returns the 'requisition items' screen



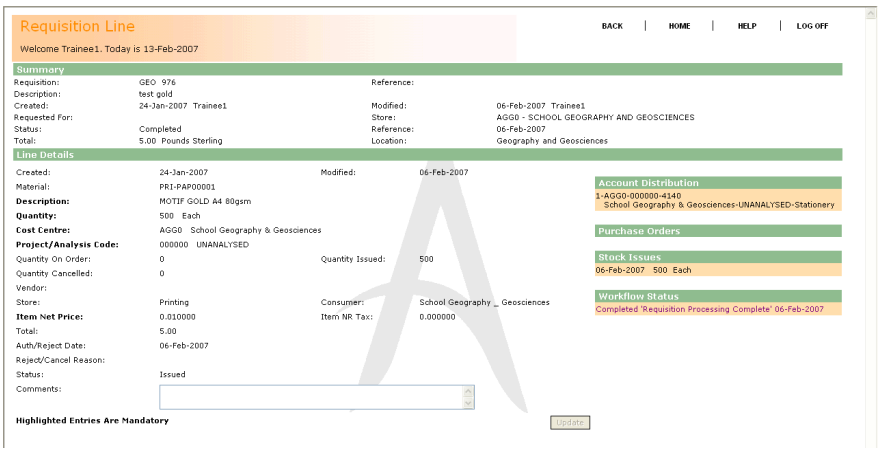
When viewing the requisition detail, the messages from the workflow model indicates the progression of the requisition through the system giving detail such as 'Awaiting 'Financial Approve Level 0' 06-Feb-2007 and clicking on the messages gives more detail (eg the name of the approver(s)).



Similarly, from the 'requisition items' screen, clicking on the actual material shows details about the material itself. In this case, a purchase order (number ART 238) was raised for the material on 25-Nov-2009. Any receipt / invoice details would also appear here.



If the item was issued from an Aptos store, the issue information would be shown:



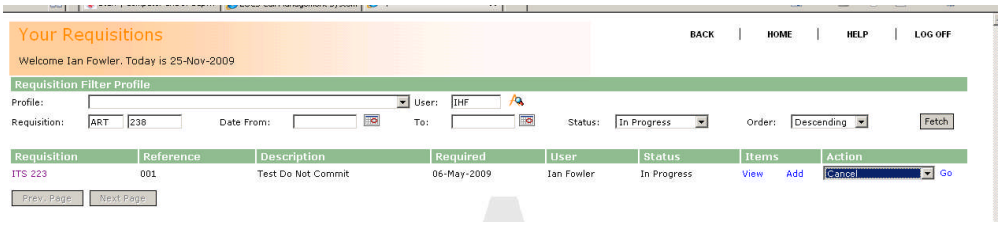
5.2. Actions column

When available, there are two options in the actions column – 'submit for approval' and 'cancel'.

To submit requisitions for approval or cancel them from this screen:

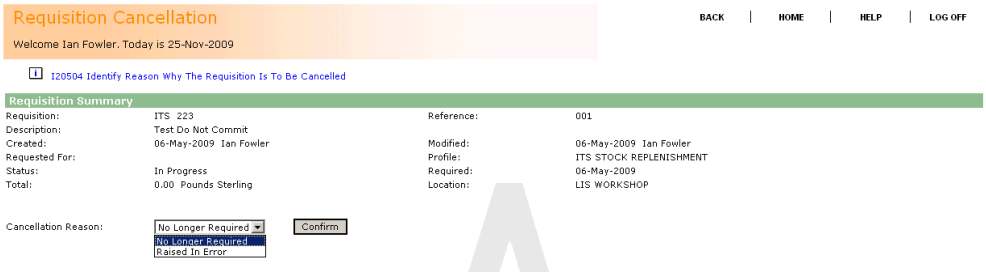
- Select the option from the Action drop-down list to the right of the requisition
- Click 'GO'.

Cancelling a Whole Requisition



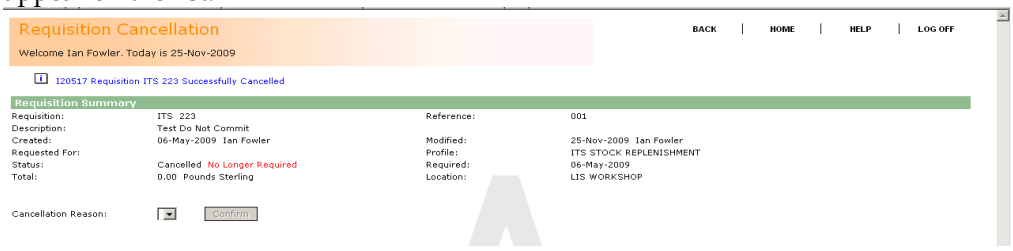
- Choose cancel from the actions drop-down on the chosen requisition line.
- Click GO.

A confirmation screen is shown:



- Select the reason for cancelling the requisition
- Click the confirm button.

A 'successfully cancelled' message will be displayed and the requisition will no longer appear on the list.



Viewing/Cancelling requisition lines

Click on the requisition number in the 'your requisitions' screen so see the actual lines.

To cancel a line:

- Select CANCEL from the 'Actions' drop down list on the appropriate line
- Click GO.
- Enter the number to be cancelled
- Click CONFIRM

A message appears to confirm the cancellation

- Click BACK (BACK) to return to the requisition items screen
- Click BACK again to return to the 'Your requisitions' screen.

To amend a line:

- Click on the 'material' of the line to be amended
- Amend the quantities / codes as necessary
- Click UPDATE

  A message appears to confirm the update has been successful

- Click BACK again to return to the 'Your requisitions' screen.

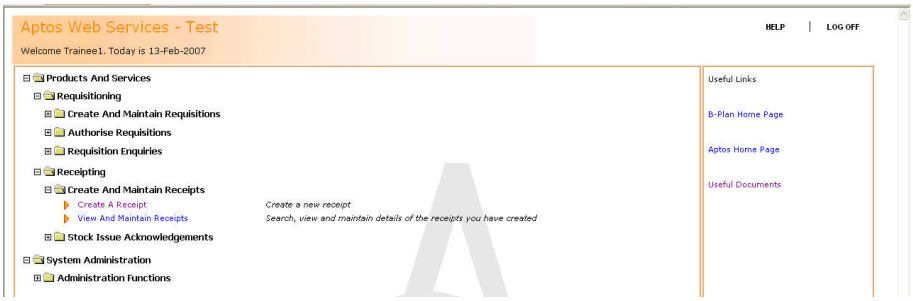
6. Web Receipting

Web receipting allows an alternative method for receipting Aptos Purchase Orders.

It is especially useful for orders raised via the marketplace or if the only Aptos function a user needs is to be able to receipt orders.

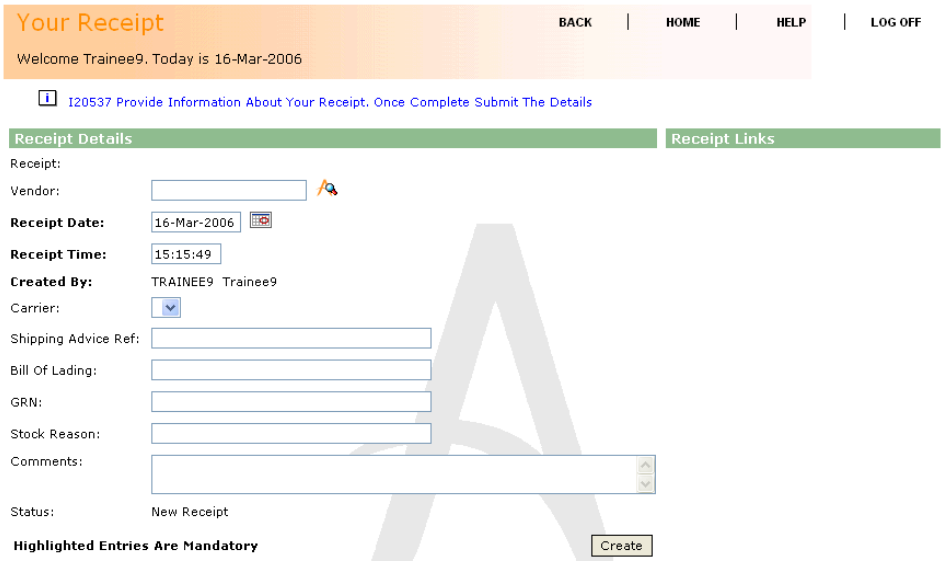
6.1. Create a Receipt

- Receipt one Purchase Order at a time



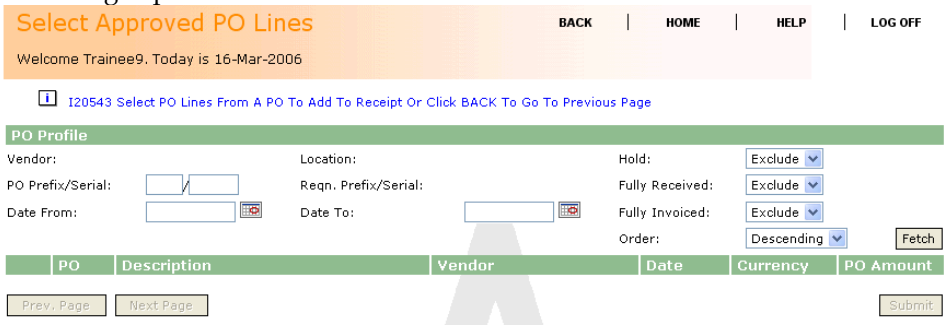
- Click on:

Products and Services – Receipting – Create and Maintain Receipts – Create a Receipt



- Enter the GRN (Delivery note no) in the 'GRN' field.
- Click the 'Create' button.

This brings up a search screen



In the 'PO Profile' section:

If the PO number is known – it should be quoted on the delivery note!

- Enter the PO Prefix and Serial Number in the 'PO Prefix/Serial' box
- Click Fetch

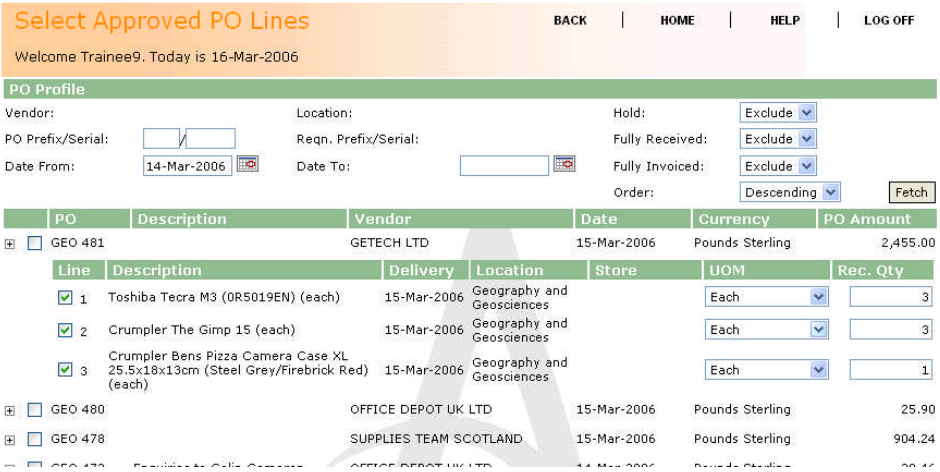
If the PO number is unknown

- Enter a date in the 'Date from' box that precedes the date the order was raised.
- Click Fetch

All POs placed after that date now appear in the bottom half of the screen.

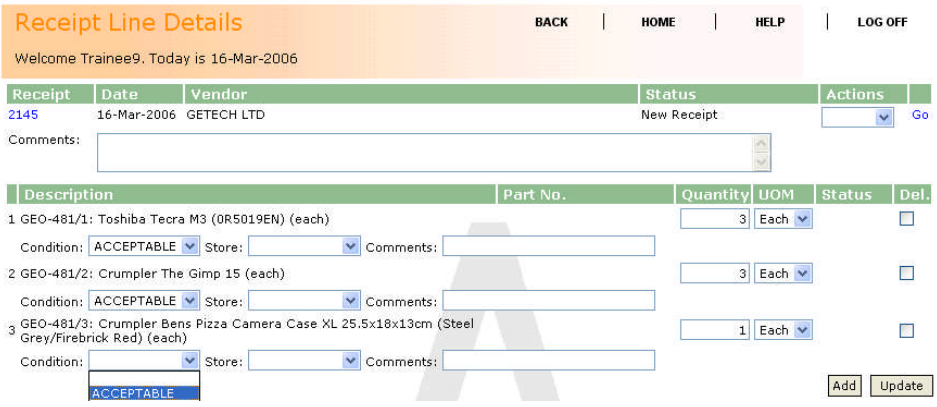
To find the PO you want to receipt:

- Click on the ⊞ at the start of a line to check the contents of a PO.



For the PO/requisition that you want to receipt

- Tick the checkbox at the start of each PO line that contains goods you've received.
- Alter the 'Rec. Qty' for each PO line, so that it reflects the actual quantity of goods received
- Click the 'submit' button at the bottom right of the screen



In the 'Description' section:

- Select 'Acceptable' or 'Reject' from the 'Condition' drop-down list on each PO line.
- Double-check the quantities for each line and adjust if necessary.
- Click the 'Update' button at the bottom right of the screen.

You should see the following message appear near the top of the screen

I20539 Receipt(s) Updated Successfully

In the upper 'Receipt' section:

- Select 'Submit' from the 'Actions' drop-down menu.
- Click 'Go' at the end of the receipt line.

The following message appears

I5282 Receipt 2145 Submitted Successfully

You have successfully receipted your order:

- You can view the receipt through web services screens
- The same receipt is visible on the core system, attached to the relevant PO.

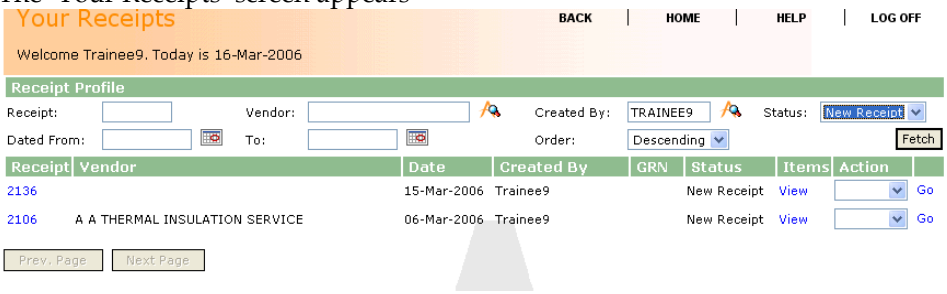
- Click the 'Home' button at the top right of the screen to return to your web services menu page.

6.2. View Existing Receipts

- Click on:

Products and Services – Receipting – Create and Maintain Receipts – View and Maintain Receipts

The 'Your Receipts' screen appears



By default, it displays

- all new receipts which have not yet been submitted.
- each receipt on its own line.

6.2.1. Search for receipts

In the 'Receipt Profile' section of 'Your Receipts' screen:

- Change the 'Status' drop-down to blank, to show all types of existing receipt.
- Enter a date in the 'Date from' field, after which you want to view all receipts.
- Click 'Fetch'

A new set of receipts is displayed below the search fields you've just used.

6.2.2. View receipt contents

For a particular receipt displayed in the search results on 'Your receipts' screen:

- Click the 'View' link to view the items covered by the receipt.
- Click the 'Home' link at the top right of the screen to return to 'Your Receipts' screen.

6.2.3. Scrap a receipt

For a particular receipt displayed in the search results on 'Your receipts' screen:

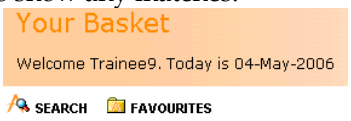
- Select 'Scrap' from the 'Actions' drop down menu.
- Click 'Go' at the end of the same line.

7. Searching For Materials

7.1. Searching While Raising A Requisition

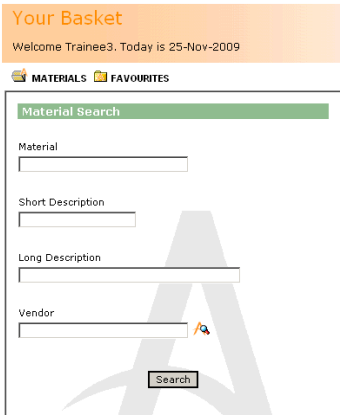
7.1.1. Using the Search facility

Rather than browsing through the materials, it may be more convenient to search and let Aptos show any matches.

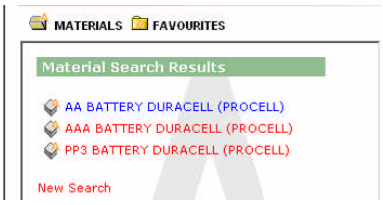


- Click on the search icon in the top left of the materials list, to bring up the search page.

(If not within a requisition, use the 'material enquiry' option from the home page.)



- Use the 'Long description' field to search for items.
- Enter a wildcard (*) before and after your search phrase.
- Click SEARCH (Search) to show the results.



It is possible to search on various fields, but the long description is recommended as it is the easiest way to get results. This search is not case sensitive and it is definitely advisable to enter the wildcard (*) before and after the text.

- Add a material to the basket from the list of matches by clicking on it.
- Start a new search by clicking 'new search'.

7.1.2. Using the Favourites folder

- View materials marked as favourites by clicking the FAVOURITES folder, next to the search icon.

7.2. Searching Without Creating a Requisition

➢ Click on:

Products and Services – Requisitioning – Requisition Enquiries – Material Enquiry

This will give a list of materials on the left side of the page

➢ Select the correct profile in the 'Profile' drop-down menu at the top of the screen.

➢ Click on a particular material to view further information about the item such as the store it belongs to and its price.

This information appears in the right hand part of the screen.

➢ If appropriate, click the Favourites button to the bottom right of the 'Material Details' to add the item to your Favourites list.

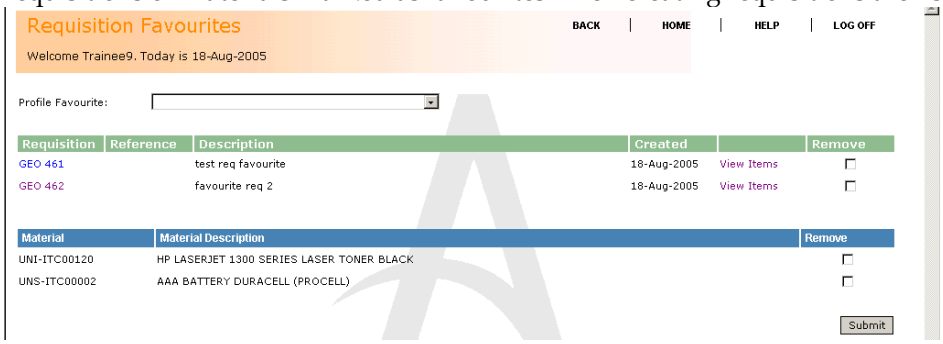
8. Maintain Favourites

Again you need to be on the Aptos Web Services homepage.

- Click on:

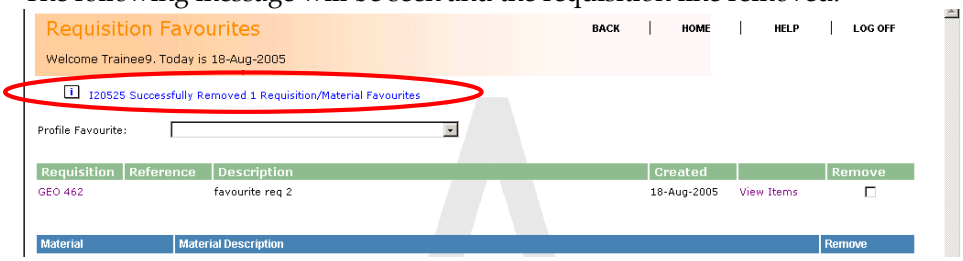
Products and Services – Requisitioning – Create and Maintain Requisitions – Maintain Favourites.

Requisitions or materials marked as favourites when creating requisitions are listed:



- To remove a 'favourite requisition', tick the 'remove' box
- Click 'Submit. '.

The following message will be seen and the requisition line removed:



  - Once approved a requisition cannot be amended,

- Delete Favourite materials using the same method

It is possible to mark individual materials as favourites, when adding them to a basket . These favourites can be used to create new baskets (then requisitions) more quickly.

9. Amending a Cost Centre and/or Project/Analysis Code

Some profiles allow the user to change the cost centre and/or project/analysis code on a requisition line if required.

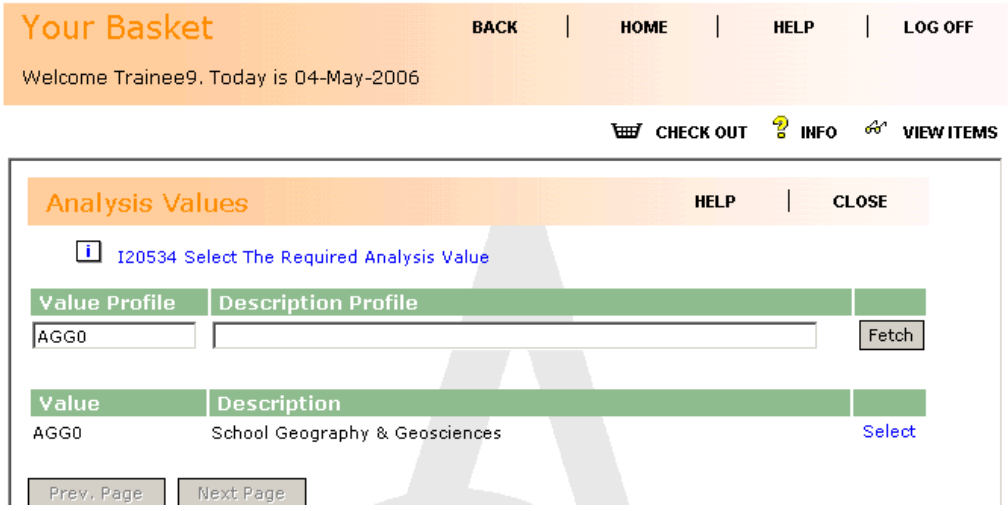
- To alter the code, either
  - Before you complete the line - make the changes in the 'Material Request Details' section of the 'Your Requisition' page.
  - After you complete the line - click on the link to the item in the 'Material' column of the list of the items you've already added.

In either case:

- Type the new code into the box, if you know what it is.

- If you don't, click the icon next to the field you want to alter.

The 'Analysis Values' screen will appear showing either cost centres or project/analysis codes:



If you've got cost centres and you wanted project/analysis codes (or vice versa):

- Click the 'Close' button on the 'Analysis values' header bar, and try again.
- DON'T use the 'Back' button at the very top right of the screen because it won't send you back to the correct screen.

- Use the 'search' at the top to filter the list of values displayed.

For example entering AGG* in the 'Value Profile' field and clicking FETCH (Fetch) will revise the list to values starting AGG.

Similarly, entering text in the 'Description Profile' field to search by description (note the search is case sensitive). When searching by description, remember to enter a wildcard (*) before and after the text you type in.

- Select the required code by clicking SELECT on the same line as the new code you want to use.

- **Marketplace orders** – Overwrite the cost centre and/or project/analysis codes at the time of assigning categories.

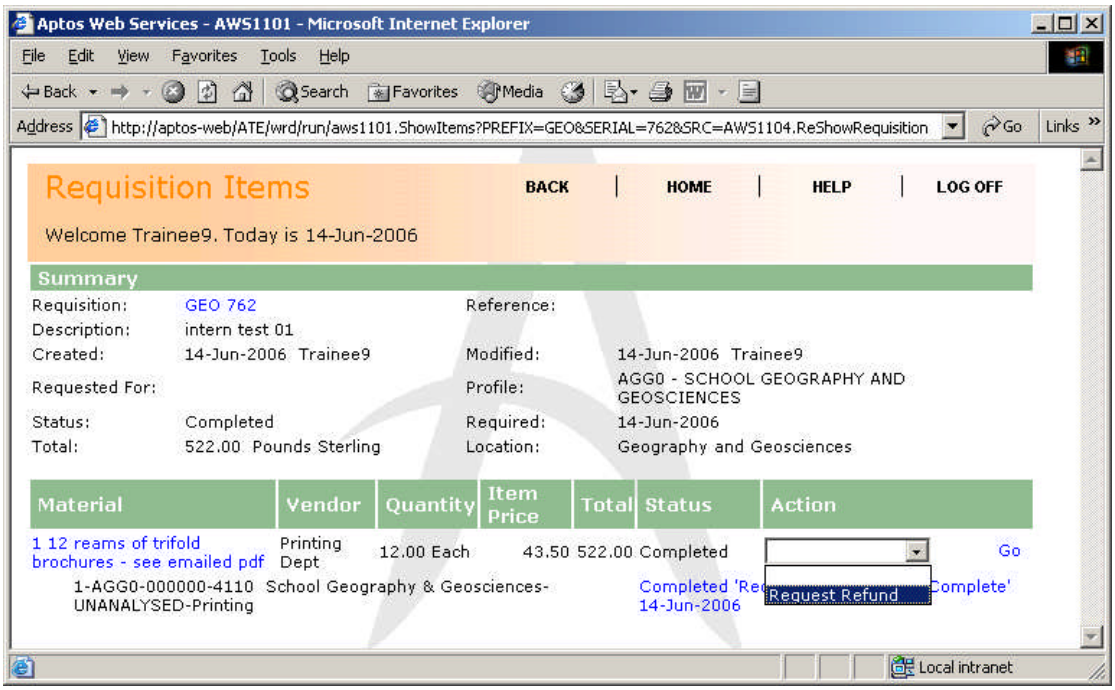
10. Internal Services Refunds

Once an internal service requisition has been completed, there may be occasions when you wish to request a refund.

10.1. Request a Refund

Before requesting a refund via Aptos:

- Speak to the internal service provider and say why you are requesting the refund.
- Retrieve the requisition within the web.



- Select 'request refund' from the action drop-down box in the requisition items screen
- Click GO

If the service provider agrees to the refund, they will accept it. In this case, a voucher will automatically be created and posted with the refund value.

If the service provider does not agree to the refund, they will reject it.

10.2. Check if a refund request has been dealt with.

- Retrieve the requisition within the web.

  Whatever the service provider does, the requisition will appear exactly as it did prior to the refund request, with requisition header and line statuses of 'Completed'.

- Click on the workflow message on the relevant requisition line.

  You will see whether the refund for that line has been 'rejected' or 'actioned' near the bottom of the workflow history.