Guidance on ... how to attach quotations onto Purchase Orders at PO Creation Stage in uBASE

As per the University of Sheffield Financial Regulations, for all line items that are between £5,000 and £50,000 (excluding VAT), a minimum of three written quotations must be obtained. This also applies if the total value of the goods or services are between £5,000 and £50,000 (excluding VAT) See Aggregation rule.

Evidence of these quotes must be attached to the purchase order at either line item level via myPurchase requisitioning, or if necessary at the purchase order header level.

Checks should be made whether quotations have already been added to lines at the shopping cart stage, which copy through to purchase order lines.

Further information regarding this requirement can be found here: Financial Regulations SIA 17 Ordering and paying for goods and services from suppliers

Purchase orderers should check all purchase order lines to see if quotations have already been added at the requisition stage.

If no quotations can be found on the purchase order for either line items that are between £5,000 and £50,000 (excluding VAT) or where the total value of the goods or services are between £5,000 and £50,000, purchase orderers are able to subsequently add the necessary documentation to the purchase order header.
Checking Purchase Order lines for Quotations

It is important to check individual line items on a purchase order which are between £5,000 and £50,000 (excluding VAT) as the requisitioner may have already attached three quotations. Checks also need to be performed if the total value of the goods or services are between £5,000 and £50,000 (excluding VAT).

Quotations will not need to be added to purchase order headers if they have already been added to purchase order lines via myPurchase.

These checks can be performed when either

- creating a purchase order
- viewing a purchase order

To check whether attachments have been added at the requisition stage

- Create the purchase order using ME57 - Assign and Process Purchase Requisitions in the usual manner.

This screen will open:

- Select & highlight the purchase order line item to check so that the line turns orange.
- Click on the Documents button to view attached files.
This window will open:

This displays a list of all documents that were attached to the line as part of the myPurchase requisitioning process.

Double Click on the on any of the lines under the Document column.

This window will open:
Double click on the document or highlight the document and click on the Display button to display the document in the appropriate application.

To return to the original purchase order screen:

- Click on the Back button. This will return to the list of attachments.
- Once finished with the list of attachments, click on the Cancel button and this will return the screen to the original purchase order screen.
Attaching a Quote to a Purchase Order Header

It is only necessary to add quotation attachments to a purchase order header if

- A purchase order line is between £5,000 and £50,000 (excluding VAT) and no quotations have been added.

or

- The total value of the goods or services are between £5,000 and £50,000 (excluding VAT) and no quotations have been added.

To attach a quote to a purchase order header:

- Create the purchase order using ME57 - Assign and Process Purchase Requisitions in the usual manner.

This screen will open:
Click on the right of the button, at the top left of the screen. This will open a drop down menu. 

In the menu, select Create... and then select Create Attachment.

This will open the following window:

- Use the Import file window to find the folder that contains the required attachments.

- Select the file and click on the Open button.

This will display a further window:

- Repeat this process for each quotation until at minimum of three quotes have been attached to the Purchase Order.
- Complete the purchase order as usual.
Viewing a Quote Attached to a Purchase Order Header

To view Attachments on the header section of a saved PO:

- Open transaction ME23N - Display Purchase Order to show the purchase order on screen

This window will open:

钯 Click on the right of button, at the top left of the screen. This will open a drop down menu.
钯 In the menu, select Attachment List.
This screen will appear:

Double Click on each of the attachments to display it in the associated application.

**Need help or more information?**

If you are having problems logging into the system then contact the myPurchase and uBASE helpdesk via email at: mypurchaseubase@sheffield.ac.uk