

YEP Basics

System Sign in to YEP (Agresso)

Use your University user name (for example js279) and password to [log into YEP \(Agresso\)](#).

Raising a Requisition

There are 3 methods of placing an order:

Catalogue orders

- Punchout to the catalogues (go shopping).
- Search for products as you would in any e-market (eg Amazon).
- Return basket to Agresso and generate to requisition.

Freeformat orders

- Search for product code and type over the description with your order details.
- Add additional description if needed in the large text box.
- Scroll down to complete the coding. You can change the VAT and account codes in this area if needed.

Punchout (through go shopping)

- The link takes you directly to the supplier's website, select your items in a basket.
- Once selected create your requisition as you would a catalogue order.

What should it look like?

You can find examples of [how to structure your order here](#), how you'll be invoiced should dictate the format of your order.

Financial regulation requirements

- You should use preferred suppliers where applicable.
- 3 quotes required above £5,000 –YEP search results count as quotes.
- Additional process for above £25,000 and EU-funded purchases.

Goods Receipting

- If you haven't had an email advising an invoice has been received, then [goods receipt your order using the non-task method](#).
- If you have received an email advising an invoice has been received, and you have a goods receipt task to complete, you must [goods receipt using the task method](#). Otherwise you'll continue to receive email reminders.
- You can part goods receipt an order e.g. ordered 5, received 2 OR ordered 1, received 0.5. If you expect more than 1 invoice however, it's best to raise a call off order (see *What should it look like?* on page 1).

Amending and Closing Requisitions/Orders

You can only amend a requisition up to the point of approval, once approved and converted into an order, it can no longer be amended. The order should be closed (contact procurement@york.ac.uk to request closure) and a new order raised.

Returns

- If you need to return an item it is the responsibility of the department to arrange a return/credit directly with the supplier. This isn't processed through YEP.
- If you subsequently need to cancel the order, after contacting the supplier directly, please email procurement@york.ac.uk to request that someone closes it.
- You still need to goods receipt a returned item once a credit has been received.

Invoices

- All invoices should be received electronically by Accounts Payable. If you receive one directly, forward it to accounts-payable@york.ac.uk for paying.
- Please note an invoice cannot be paid unless you goods receipt the order first.
- For all invoice queries contact accounts-payable@york.ac.uk.

Approval Workflow

- Under £150 no approval required
- £150 - £5000 budget holder approval* (this is the named order-responsible person on the workorder)
- £5000 - £25000 high level approvers in the budget holding department (these were nominated by the department)
- £25000 Procurement

*Note, if the budget holder raises the requisition and it's above £150, it will go to another nominated approver, usually the line manager. Check the workflow on the requisition to see who it has gone to (see [FAQs](#) for guidance).

Training Resources

Note, these resources can also be found on the [YEP webpage](#), under 'Training'.

Quick cards provide easy to read guidance on specific topics:

- [Catalogue requisitions](#)
- [Free-format requisitions](#)
- [Attaching documents to a requisition](#)
- [Goods receipting no task](#)
- [Goods receipting with an Agresso task](#)
- [Approving requisitions](#)
- [Managing rejected requisitions](#)
- [Requisition enquiries](#)
- [Printing/saving a copy of an order](#)

There are **eLearning modules** available through the LMS. It's best to log into the system before clicking on the video links (note the LMS is only available to staff - temps and students use the [Finance Training for Associate/Temp Staff web page](#) instead of the links below).

- [Raising a catalogue requisition](#)
- [Raising a freeformat requisition](#)

- [Approving requisitions](#)
- [Goods receipting](#)
- [Requisition enquiries and managing rejected requisitions](#)

Who do I contact if I have any questions or issues?

- Please ensure to check the [YEP webpages](#) and the [FAQs](#) to see if you can find an answer to your question before contacting the support team.
- If you can't find an answer to your question, please contact finance-systems@york.ac.uk.
- If you need an order opening or closing, please email Procurement: procurement@york.ac.uk.
- For any changes to supplier details or with regards to invoices please email Accounts Payable: accounts-payable@york.ac.uk.
- If you believe your requisition (below £5,000) has gone to the wrong person for approval, please [contact your Finance Administrator or Accountant](#) to arrange amending the budget holder on the workorder.

Useful links

- [Check if a supplier is on YEP](#)
- [Supplier Lookup](#)
- [Information on how to request a new supplier](#)
- [To add new workorders, use Authorised Systems Registration](#) (note select Agresso)
- [FAQs](#)

For further information see the Finance webpages

- [Finance home page](#)
- [YEP](#)
- [Buying goods and services information](#)
- [Finance dept contacts](#)
- [Mandatory Suppliers list](#)