

PROCUREMENT: After the Fact Requests

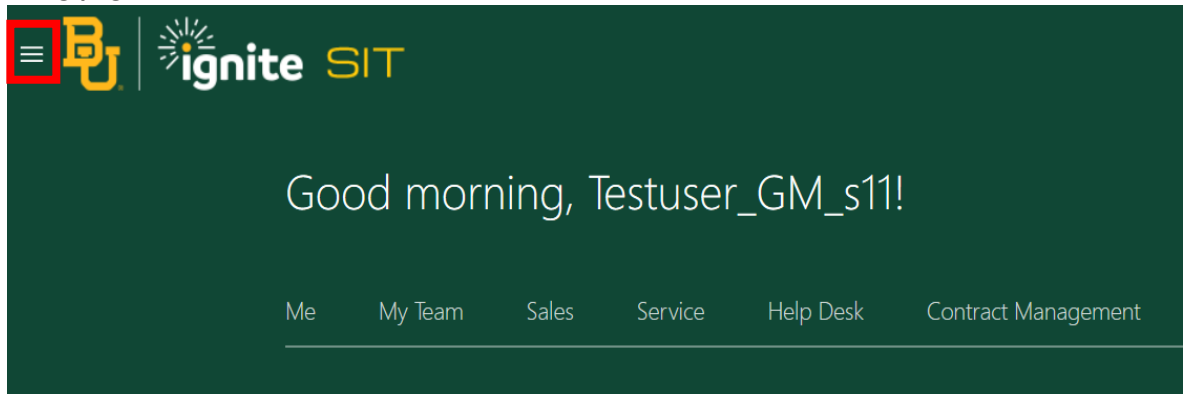
Overview

- This job aid is intended for all individuals with the Shopper role.
- An 'After the Fact Request' refers to a purchase that occurs before a PO is issued and requires obtaining approval after the commitment was made, rather than before.
- If you have made an external purchase prior to creating a requisition in Ignite, you will submit an 'After the Fact Request' to create a requisition for this purchase, a Procurement specialist will need to review this submission in order for a PO to be created. Once reviewed by the Procurement specialist, a PO will be generated for payment.
- After the Fact Requests represent unauthorized purchases, as such all requests must contain sufficient justification and an action plan detailing how the request will be avoided in the future.

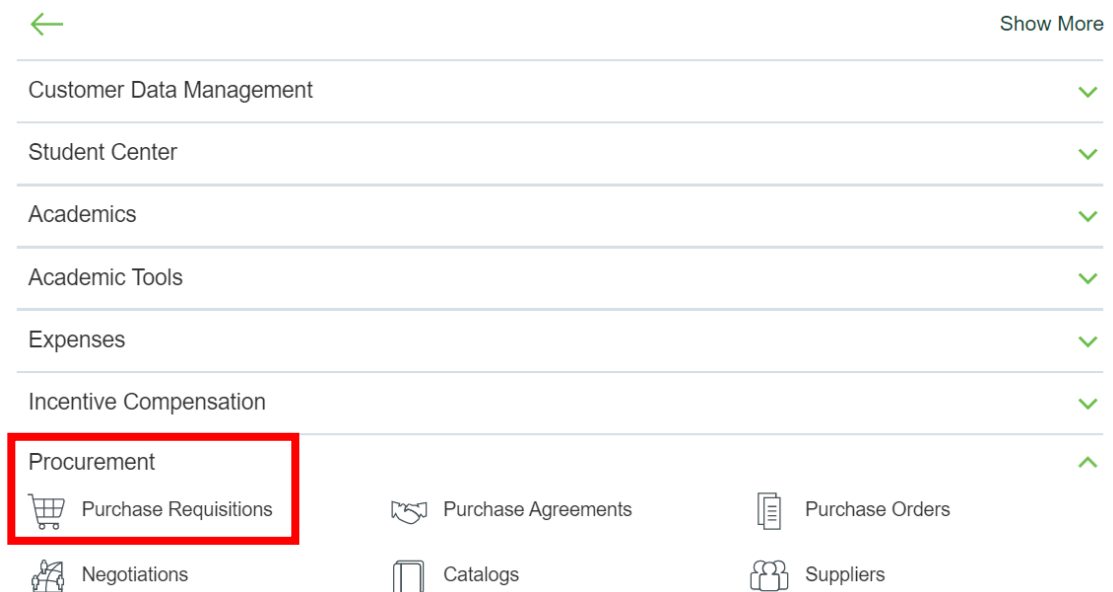
PROCUREMENT: After the Fact Requests

I. Navigating to After the Fact Requests

- I. You can access the **Purchase Requisitions** task in two ways:
 - a. (Option I) Click the **Navigator** icon in the upper left-hand corner of the Ignite landing page.

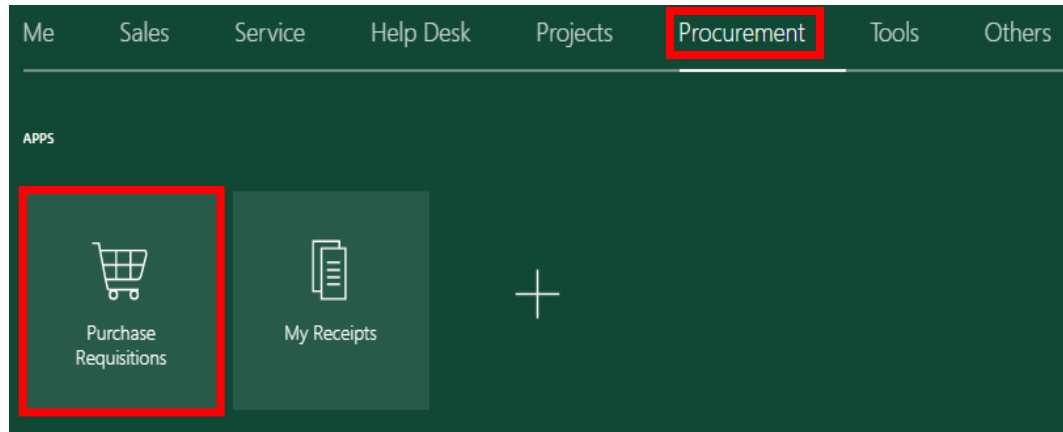


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



PROCUREMENT: After the Fact Requests

- c. (Option 2) Under the **Procurement** heading on the home page, you can scroll down and click on the **Purchase Requisitions** tile.



2. Scroll to the bottom of the page and select either **Goods- After the Fact** or **Services- After the Fact**.

Recent Requisitions		View More
REQ0000485	Copy paper for biology lab	Pending approval

Top Categories



1. Marketplace



2. Goods - Non-Catalog



3. Services - Non-Catalog



4. Payment Request



5. Goods - After the Fact



6. Services - After the Fact

PROCUREMENT: After the Fact Requests

2. Submitting an After the Fact Request

I. Enter the required fields for a **Goods-After the Fact Request**.

- a. **Item Description:** Description of item(s) you are requesting to purchase
- b. **Category Name:** Category of item(s) you are requesting
- c. **Quantity:** Total number of items you are requesting
- d. **UOM Name:** Unit of measure to describe the quantity of goods
- e. **Price:** Unit price for item(s)
- f. **Currency:** Defaults to USD

Create Request: 5. Goods - After the Fact Request

Place goods request after the invoice is received in an attempt to pay the supplier.

Line Type Goods

* Item Description

* Category Name

* Quantity

* UOM Name

* Price

* Currency USD

Create Request: 6. Services - After the Fact Request

Place services request after the invoice is received in an attempt to pay the supplier.

Line Type Services

* Item Description AFTER THE FACT REQUISITION

* Category Name

* Amount

* Currency USD


2. For a **Services-After the Fact Request** you are only required to enter:

- a. **Item Description:** Description of service you are requesting.
- b. **Category Name:** Category of service you are requesting. Use the search function to determine which category applies to your request.
- c. **Amount:** Total cost of the service being performed.
- d. **Currency:** Defaults to USD.

Note: When creating the requisition the quantity, unit of measure and price must match the invoice. Any requisitions that do not match the invoice will be rejected and returned for correction.

PROCUREMENT: After the Fact Requests

3. If there is a previously negotiated agreement with the supplier, an agreement number must be populated in the **Agreement** field. You can use the search function to locate the correct agreement number. Once the agreement is selected, the supplier information will auto-populate.

Add to Shopping List Add to Cart Done  0

Agreement

Supplier

Supplier Site

Supplier Contact


Phone

Fax

Email

Supplier Item

4. If the request is not related to a contract, then you must populate the **Supplier** and **Supplier Site** by using the search function or by directly typing the supplier's name. If there are multiple supplier sites (addresses), select the appropriate option from the drop-down. The remaining supplier contact fields will auto-populate based on the selection.

Add to Shopping List Add to Cart Done  0

Agreement

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Supplier Item

PROCUREMENT: After the Fact Requests

5. Be sure to add the appropriate **Attachment(s)** related to this request, such as an invoice that has already been received, emails supporting the purchase etc. Click the **+** icon, then select **Choose File**, browse to locate the file, select it and click **Open**. The title of the attachment will populate. Add a **Description** for the attachment. Continue this process for all for all necessary attachments.

Attachments

View ▾ **+** ✕

Type	Category	* File Name or URL	Title	Description
File ▾	Internal to Rec ▾	Choose File No file chosen		

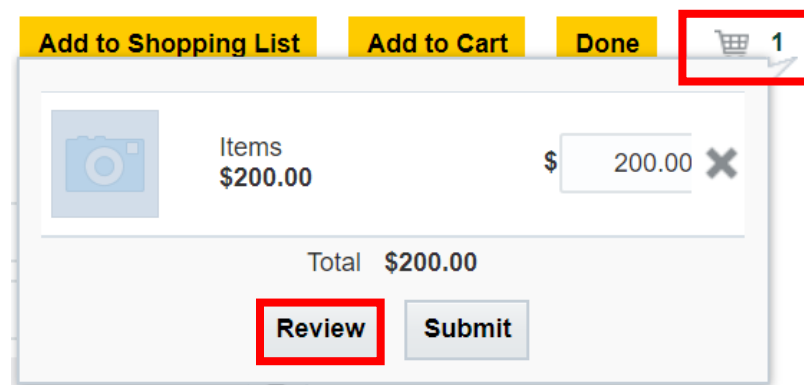
6. Next, click the **Add to Cart** button.



Agreement ARG0000013 🔍

Supplier Nike USA Inc

7. Click the **Cart** icon then select **Review**.



PROCUREMENT: After the Fact Requests

- Review the requisition information. **Enter justification information for approvers to approve the transaction, including an action plan discussing how the After the Fact Request will be avoided in the future.**
- The **Deliver-to Location** and **Charge Account** will auto-populate based on the information saved in your **Requisition Preferences**. *If you need to set up or change these preferences, see the Job Aids: Requisition Preferences – Charge Account COA-POETAF or Requisition Preferences – Shipping & Delivery Address.* These can be changed, if needed.

Line 1: Details

Delivery

* Requester: Bruiser Bear

Urgent: No

Requested Delivery Date: 2/26/20

Deliver-to Location Type: Internal

* Deliver-to Location: Rosenbalm Fountain

Deliver-to Address: 1360 S 5th St, Waco, McLennanTX 76706, UNITED STATES

Billing

View Format Freeze Detach Wrap

Project Costing Details							Charge Account Nickname	Charge Account	* Budget Date
Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source			
							500-50110-100-1000000-93722-220-0		2/19/20
Total									

- In the **Billing** section, review the **Charge Account** information for each line item. If you need to charge your requisition to a sponsored program, you can enter the **Project Number** in this section, or select a pre-defined charge account by changing the **Charge Account Nickname**.

Billing

View Format Freeze Detach Wrap

Project Costing Details								Charge Account Nickname	Charge Account
Distribution	Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source		
1							office supplies	110-10745-100-1000000-00000-701-0	
Total									

Note: The Account segment of the chart of accounts can only be changed by selecting a different procurement category.

PROCUREMENT: After the Fact Requests

11. Prior to submitting the requisition, click the **Check Funds** button to confirm that funding is available.

The screenshot shows a navigation bar with buttons: Shop, Check Funds (highlighted with a red border), Manage Approvals, View PDF, Save (with a dropdown arrow), and Submit. Below the navigation bar is a form area with a text input field containing a purchase order number. To the right of the input field, the following information is displayed: Requisition Amount 400.00 USD, Approval Amount 400.00 USD, Funds Status Passed, and Attachments None with a plus sign.

12. A pop-window will appear indicating whether the funds are available. Select **OK**.

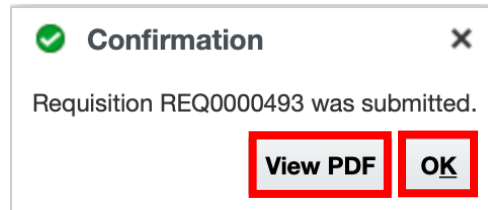
The screenshot shows a confirmation pop-up window with a green checkmark icon and the title 'Confirmation'. The message reads: 'The transaction passed the funds check process.' At the bottom of the window, there are two buttons: 'View Funds Check Results' and 'OK' (highlighted with a red border).

13. Click **Submit** for approval.

The screenshot shows the same procurement interface as in step 11, but with the 'Submit' button highlighted with a red border. The navigation bar also includes a home icon, a notification bell with '14', and a user profile icon with 'BR' and a dropdown arrow. The form area and summary information (Requisition Amount 400.00 USD, Approval Amount 400.00 USD) are the same as in step 11.

PROCUREMENT: After the Fact Requests


14. A pop-up message will appear confirming that the requisition has been submitted for approval. Click **OK**. To view a PDF version of the request, select **View PDF**.



15. You can see the **requisition number** and **status**. After the requisition has been submitted, it will require the necessary approvals and then flip to a Purchase Order. The Supplier will send Baylor University an invoice, which will be reviewed and then paid by AP.

Requisitions

More Tasks ▼

Recent Requisitions		View More
REQ0000504	Items	Pending approval
REQ0000493	Nike football equipment	Pending approval
REQ0000485	Copy paper for biology lab	Pending approval