Overview

- This job aid is intended for all employees with a Shopper role.
- What is the purpose of a purchase requisition?
 - Purchase requisitions are used to place requests for purchases that then go on to be submitted for approval, turned into purchase orders, and sent to suppliers.
- What is the difference between a requisition and a purchase order?
 - A requisition is a notification of a need, it is not the order itself. Once the request is processed, it then goes through the system to be processed into a purchase order.
- Why is it necessary to make purchases using purchase orders?
 - To protect the University by setting the contractual terms of the purchase.
 - To eliminate the need to enter invoices or vouchers to pay for the items ordered.
- What is a marketplace requisition used for?
 - Marketplace requisitions are used to place routine orders for goods and services.
- What are the advantages to marketplace requisitions?
 - \circ $\,$ Pricing is under contract and negotiated by the University.
 - Adherence to preferred supplier catalogs gives Procurement the ability to leverage spend.
 - Better spend analytics through information captured in the ordering process.
- In the Marketplace, employees will have the option to shop for goods and services via Showcases or Search Hosted Catalogs:
 - <u>Showcases</u>: where you will find suppliers grouped by category. Some category examples include Scientific/Lab Supplies, Electronics, and Office Supplies.
 - <u>Search Hosted Catalogs</u>: Employees can also use the search bar under Search Hosted Catalogs to search for products, suppliers, etc. within the Marketplace.
- There are specific, contracted suppliers in the <u>Marketplace</u>. The suppliers will be continually evaluated and will change over time.
- What is a Punchout?
 - Punchouts are web-based catalogs created by suppliers that connect electronically to our online purchasing system.
- Change Orders are not permitted on Marketplace Requisitions.



I. Navigating to the Marketplace

- I. The **Purchase Requisitions** task may be accessed in two ways:
 - a. (Option I) Click the **Navigator** icon in 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.





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



2. Upon selecting the **Purchase Requisitions** tile, under the **Top Categories** section, click the **Marketplace** icon.





2. Using Supplier Punchouts

1. Navigate to the **Showcases** section to select the supplier's punchout catalog. Click on the supplier icon you wish to use. The Steps 2-4 use Staples punchout as an example. Each punchout will have slight variations to these basic steps.

usiness Cards, Letterhead and Stationery									
integ									
ffice Supplies									
STAPLES	ULINE								
uilding Materials, Maintenance, Repairs, and Operations									
GRAINGER	DR0	MdMASTER-CARR.							

 Using the Search Bar at the top of the page, type in the item needing to be purchased. Then, click the Magnifier icon. You can utilize the Cancel PunchOut button anytime during the shopping process.





3. On the search results, click on the item you wish to purchase. Input the **Quantity** and then click **Add to Cart**.



4. If you have other items to shop for, select **Continue Shopping**. Once you have added your final item to the cart, click the **Review & Checkout** button on the pop-up page.

Added to cart







5. On the **Review & Checkout** page, review the order and click **Submit Order**.

eview & Chec	kout			Print to p
Order Summary	590.2		Submit Order	
Total	\$90.22			
2 items in cart				
Delivery				
	Ticonderoga The World's Best Pencil Wooden Pencils, No. 2 Soft Le tem #: 824797 MFR #: 13872/13882 CIN #: 824797	id, 96/Pack (13872)		窗 Remove
ON CONTRACT	Delivery by Wednesday, Nov 24, 2021		2 \$16.21 96/PK	\$32.42

6. This brings the supplier's cart into the Marketplace Shopping Cart. Review the information to ensure that the information is presented correctly, including the Procurement Category (Commodity Code). When complete, select **Proceed to Checkout**.

Shopping Cart ・ 151505039 ▼				= 🖶	Assign Cart	Proceed To Checkout
Simple Advanced					Details	~
Search for products, suppliers, forms, part number, e	tc.			Q	For Ashley Davis	
2 Items				□ ·	Name	
Staples, Inc. · 3 Items · 90.22 USD					2021-11-23 As	shley_M_Davis 01
SUPPLIER DETAILS					Estimate (90.22	USD) ~
Item	Catalog Size/Pack No. aging	Unit Price Quantity	Ext. Price		Total:	90.22
8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton	324791 Carton	57.80 Qty: 1 Carton	57.80	🗆		
∧ ITEM DETAILS ♦						
Commodity Code Office Supplie	es Q]				



7. Select Submit Requisition.

	\equiv	۲	•	?	Cancel PunchOut	Submit Requisition
History						
					-	Draft
				~	Total (90.22 USI	D) ~
					Subtotal	90.22
						90.22

3. Shopping Using the Search Bar

 Using the Search Bar under Search Hosted Catalogs section at the top of the page, type in the item needing to be purchased. Then, click the Magnifier icon. You can use the Cancel PunchOut button at any time throughout the process





2. From the search results, input the **Quantity** amount and then click **Add to Cart**. During this process, your search is across multiple suppliers.



3. The item has been added to your cart. Select the cart icon. You can select **View Cart** or **Checkout**.





4. Review your order and select Submit Requisition.

Cart • 151506455 -								🖶 🗿 Cance	l PunchOut	Submit Requisition
Summary PO Preview	Comments Attachments	History								
General		ø ····					~		Draft	
Cart Name	2021-11-23 1000132043 02							Total (128.00	JSD)	~
Prepared by	Ashley Davis							Subtotal		128.00
Prepared for	Ashley Davis									128.00
1 Item										
Total Office Solution	s · 1 Item · 128.00 USD									
∧ SUPPLIER DETAILS ■	1									
PO Number To B	Be Assigned	Contract no valu	e							
Item		Catalog No.	Size/Packagin g	Unit Price	Quantity	Ext. Price				
Lorell Essentials Series L-	Shaped Reception Counter	LLR69700	Each	128.00	1 Each	128.00	… 🗆			
A ITEM DETAILS	Lorell	Contract: no	value				<i>I</i>			

4. Submitting the Catalog Requisition

- 1. On the Edit Requisition page, ensure that all information is correct.
 - a. **Description:** this field carries over information from the first line of goods in your shopping cart. It should include an accurate description of your items for each requisition line.
 - b. **Justification:** this information provides the purpose for the requisition and any additional information that will be helpful for your approver to approve the requisition.

Edit Requisition: REQ0000572		Shop	Check Funds	Manage Approvals	View PDF	Save	•	Sub <u>m</u> it
Requisitioning BU BAYLOR	Justification	Staplers needed for Dr. Smith Biolo	ogy courses	Re	quisition Amo	unt 112.	26 USI	D
* Description Staplers for the Biology department					Approval Amo	unt 112.	26 USI	D
					Funds Stat	tus Noti	eserve	d
					Attachme	nts None	÷	



Requisition Lines

2. Review all required fields, in the **Delivery** and **Billing** sections.

Note: these sections default to the information saved in your **<u>Requisition Preferences</u>**. 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.

- a. Ensure the **Deliver-to Location** is accurate. This can be changed if necessary.
- b. Review the **Charge Account**. If it needs to be changed, you can select from one of your pre-defined charge account nicknames or enter the chart field values directly.
- c. If you need to charge your requisition to a sponsored program, you can enter the **Project Number** in this section.
- d. You can also add a **Note to Supplier** or **Attachment** on this page.

Delivery								
Requester	Testuser_PO_s5				Deliver-to Loca	ation Type Internal	v	
Urgent	No 🔻				* Deliver-to	Location Baylor F	Police	Q
Requested Delivery Date	01/29/2020	Ċ			Deliver-t	Address 71521 S	6 4th St, WACO, MCL	ENNANTX 76706, UNITED STATES
I Billing View ▼ Format ▼ 💥 <	Freeze 📓 De	tach 📣 Wrap						
		F	Project Costing De	tails				
Distribution Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Contract Number	Funding Source	Account Nickname	Charge Account
1 Q							•	110-10745-100-1000000-93800-701-0(
Total								
4								۱.
Notes and Attachments								
Note to Supplier			li.	Attach	nents lone 🕂			



- 3. Click the Check Funds button. Other options include:
 - a. **Shop**: this will take you back to the main requisitions screen
 - b. Check Funds: this will budget check your requisition
 - c. **Manage Approvals**: this will show who is next in line to approve the purchase request
 - d. View PDF: this will show the order in a printable format
 - e. Save: this will allow you to save the requisition and come back to it later
 - f. Submit: this will check funds automatically and send it to your approver

	Shop	Check Funds	Manage Appro	ovals \	View PDF	Sa	ve	•	Sub <u>m</u> it
Justification	Staplers needed for Dr. Smith Biolog	gy courses	11	Requi Apr	isition Amo	unt unt	112.2 112.2	26 U 26 U	SD SD
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4. Select Submit.

		Shop	Check Funds	Mar	age Approvals	View PDF	s	ave	•	Sub <u>m</u> it	
Justification	Staplers needed for Dr. Sn	nith Biolo	gy courses		F	Requisition Amount 1					
				11		Approval Amo	ount	112.	26 U	SD	
						Funds Sta	atus	Not	reser	/ed	
					Attachme	ents	None	+			

5. On the confirmation pop-up, select **OK**.



6. Under the **Recent Requisitions**, you will see that the requisition submitted **status** is pending approval. The requisition has now been submitted to your Department Approver for review. If you would like to get back into the requisition, just click on the **requisition**



