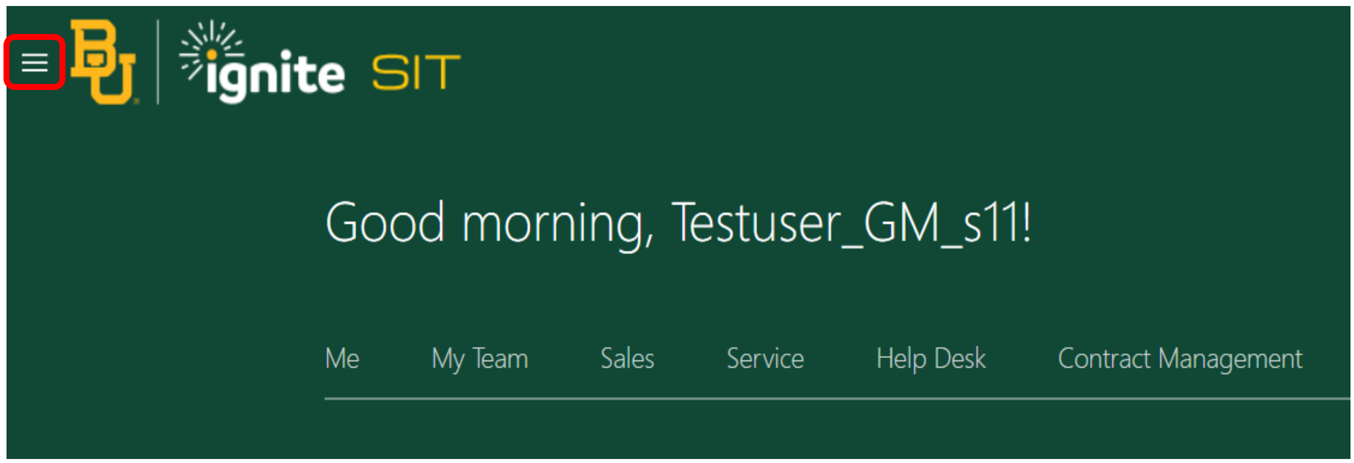
Overview

- This job aid is intended for URAs and covers how to enter a requisition for a Subawards.
- What is the purpose of a requisition?
    - A requisition represents a request to use funds for a good or service and ensures that the appropriate budgetary approvals occur.
    - When no supplier has been identified in the requisition, it provides Procurement with the information needed to conduct a sourcing event or issue a purchase order.
    - Only Procurement can create a Purchase Order (PO) after the Requisition (REQ) goes through all the necessary approvals.
- What is the purpose of a Purchase Order (PO)?
    - A PO is a form of agreement with a supplier. It stipulates terms and conditions that protect the University from commercial risks, and it authorizes the supplier to provide the goods or services within.
    - Suppliers must reference the PO number on their invoice to receive payment.
- When would you use a non-catalog request?
    - Non-catalog requests are used when the goods or services are not available in the Marketplace, or a payment request is not an appropriate method for making a purchase.
    - There are 3 primary instances when you would use a non-catalog request:
        1. To purchase goods or services from a supplier after a quote is received,
        2. To purchase goods or services from a supplier where there is an existing agreement but is not available in the marketplace,
    - To request assistance from Procurement in identifying the right supplier, via a bid or other sourcing event, to purchase goods or services.
- How do you submit a request that includes both goods and services?
    - Use the Non-Catalog Goods form to create a request for the desired good(s) items and add the items to the cart.
    - Click Done after the item is entered in the cart, and you will be returned to the requisition screen.
    - Use the Non-Catalog Services form to create a request for the desired service(s) and add the items to the cart.
    - When finished click on the cart to review and submit the items.
    - You will see a requisition has been created with both goods and services lines and is available for submission.

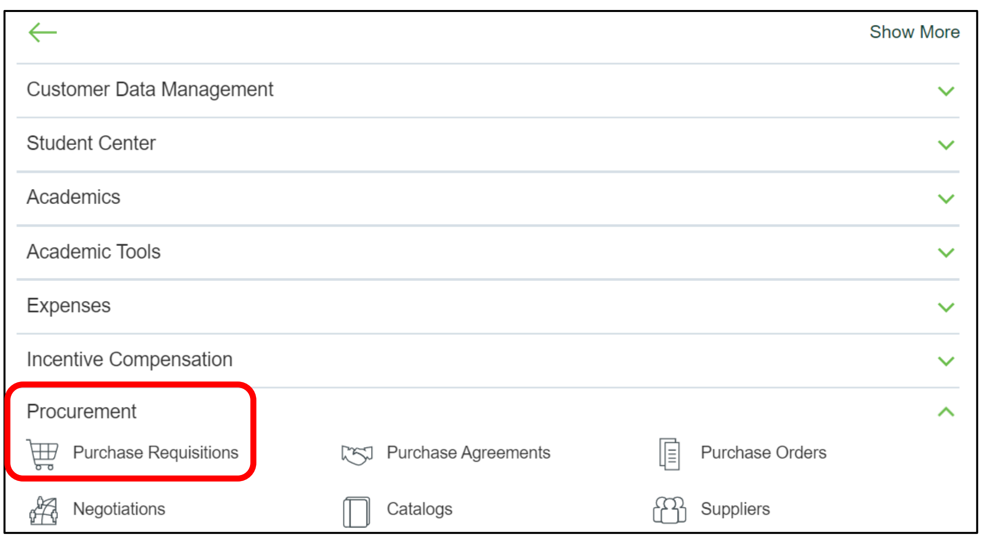
- What does it mean when items are in your shopping cart?
  - The shopping cart is a list of all the request lines that have been entered by the requester but have not yet been submitted. Items within the cart combine to form a single requisition with multiple lines.
- When creating a requisition, it is advised **NOT** to "duplicate" a previous requisition. Duplicating increases the likelihood of errors and incorrect data inputs cause extra work across the board.

1. Navigating to the Non-Catalog Goods or Services

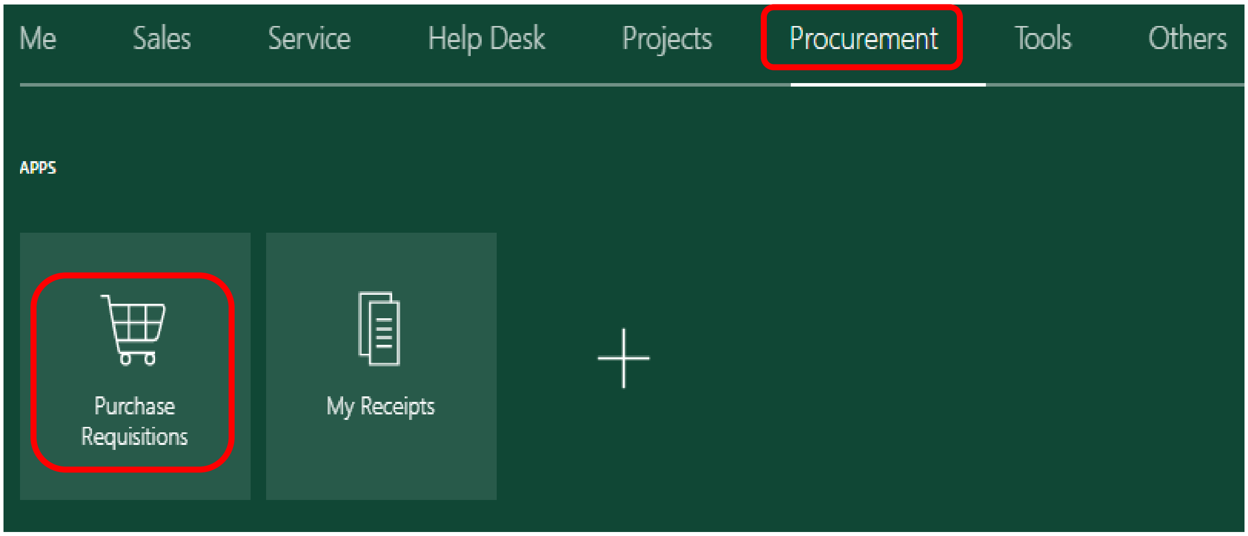
1. The **Purchase Requisitions** task can be accessed two ways:
   a. (Option 1) Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



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



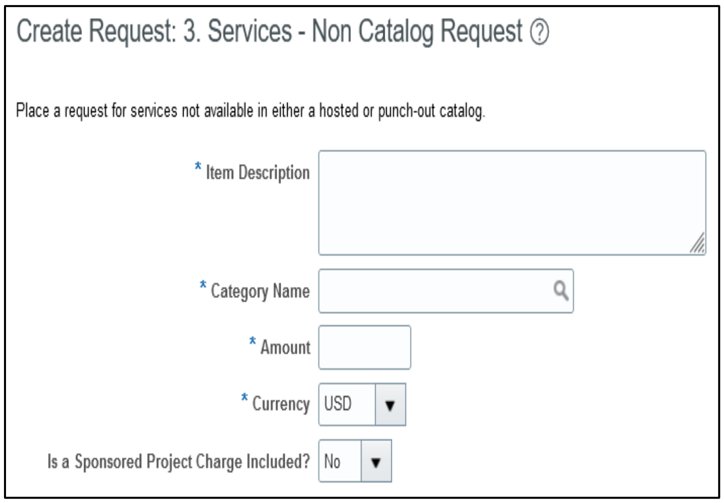
c. (Option 2) Under the **Procurement** heading on the home page, scroll down and click on the **Purchase Requisitions** tile on the main page.



2. Upon entering the **Purchase Requisitions** tile, under the **Top Categories** section click the **Services – Non-Catalog** icon.

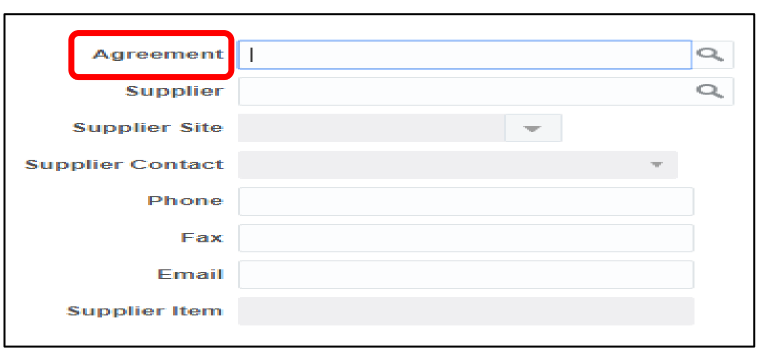
2. Creating a Non-Catalog Request

1. You will be redirected to the **Create Request** page.
   a. For a **Services – Non Catalog Request**, enter the following information:
      i. **Item Description**: Description of Service you are requesting.
      ii. **Category Name**: Category of service you are requesting. Use the search function to determine which category applies to your request.
      iii. **Amount**: The cost of the service being performed.
      iv. **Currency**: Defaults to USD.
      v. **Sponsored Project?** Use the dropdown menu to select **YES**

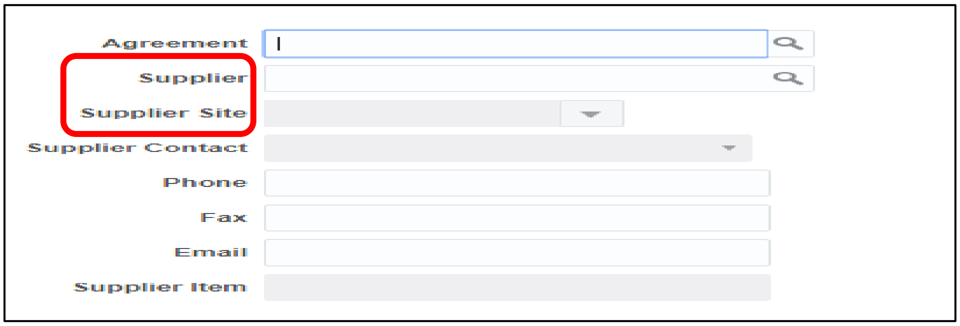


   b. If a subaward is over $25,000 then an additional line item needs to be created for the balance of the subaward amount. All lines should total the subaward.

2. If the purchase is from a previously negotiated agreement with the supplier, an agreement number must be populated. In the **Agreement** field, you may type in the agreement number for this requisition, or you may use the field's search function to locate the correct agreement number. Baylor Procurement is also available to help you select the correct agreement if there are multiple agreements for the supplier. Once an agreement is selected, the supplier information will fill in automatically.



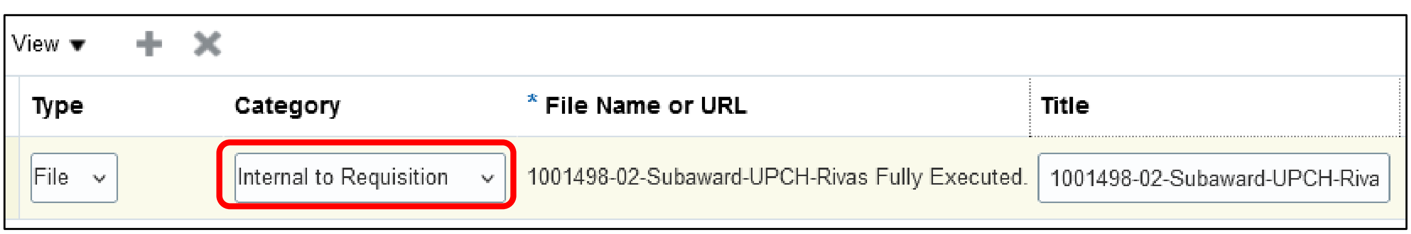
3. If the purchase request is not related to a contract, then you must populate the **Supplier** field by using the search function or by directly typing the supplier's name. If there are multiple **Supplier Sites** (addresses), select the appropriate option from the dropdown. The remaining supplier contact fields will be filled in automatically based on the supplier selection. If the requisition is submitted with the supplier field left blank, the approved requisition will be routed to Procurement to assist with supplier selection and sourcing. For the **Supplier Item**, enter the Supplier's SKU or the Manufacturer's Part Number.



   a. If the supplier is NOT found in the system, a New Supplier Request is necessary. These are handled outside the Requisition entry process. Refer to the New Supplier Request Job Aid for instructions.
      i. **It can take over two weeks to add a new supplier, so processing the request as soon as possible and communicating expectations with the new supplier will speed up the process.**

4. Under the **Attachments** section, use the **+ icon**, to attach all required documentation.
   a. The first required attachment is the **executed subaward contract** – NOT the automated Ignite document that lists the AGR#. Procurement will reach out if the executed subaward contract is not included, as the AGR# document is NOT sufficient for requisition approval.

   b. The **executed subaward contract** should be added at the header level **AND** in the Notes and Attachments section when reviewing the requisition. See below for specific settings when attaching at the Header level:
      i. Ensure the attachment category is set to **"Internal to Requisition"**. Use the dropdown menu to change if necessary.

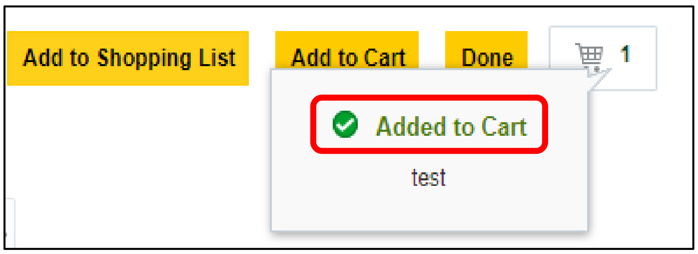


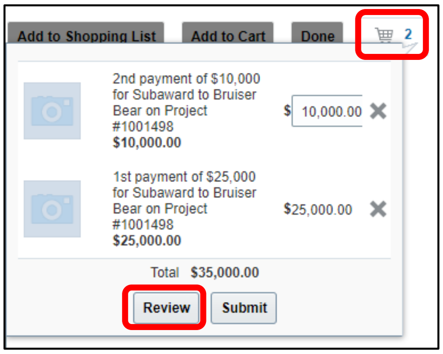
5. Once the necessary information is provided and the requested line item is complete, click **Add to Cart**.

6. The item will be added to the cart. Continue to add items to the cart using the process explained above until all items are recorded appropriately.

NOTE: If the **Attachment** loaded on Line 1 is also applicable to Line 2, do **NOT** add it a second time. This causes the system to error and your REQ will be returned for corrections.

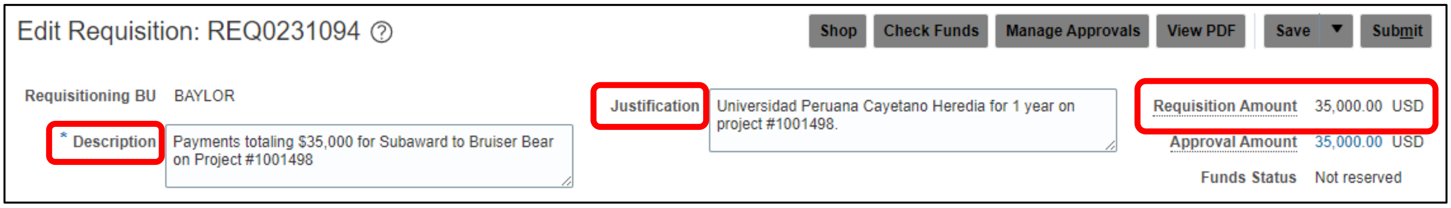
7. Then, click the **Cart icon** and click **Review**.



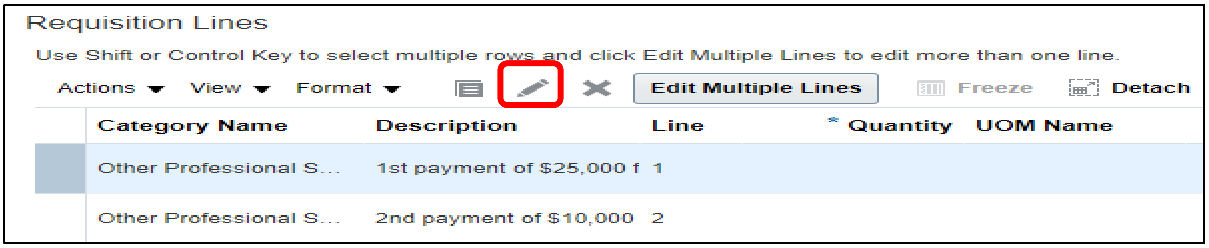


3. Review/Edit Requisition Information

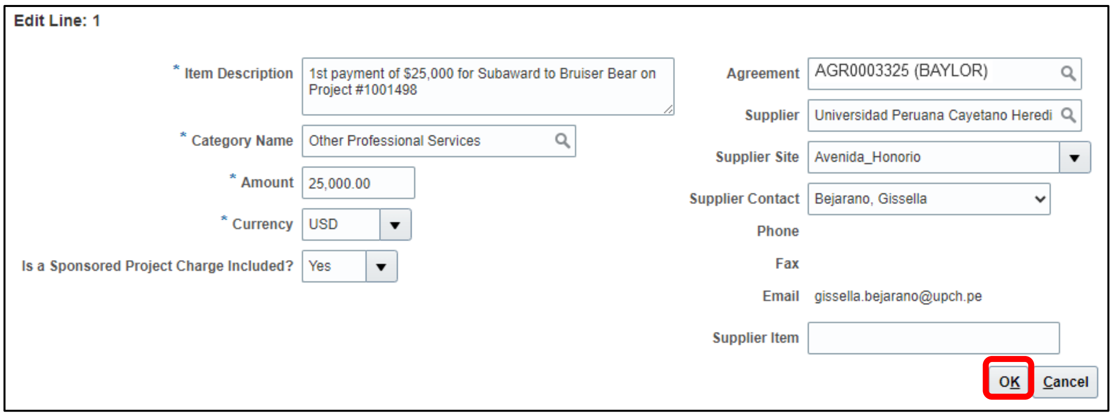
1. You are now on the **Edit Requisition** page.
   a. **Description:** this defaults with the description entered in line 1. If you have more than one line, you need to update the description.
   b. **Justification:** add information to explain to requisition approvers the desired purpose for the purchase request.
   c. **Requisition Amount:** the total amount of the non-catalog requisition



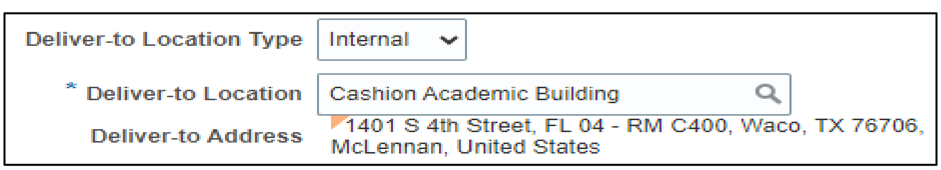
2. Review each requisition line to ensure the details are populated correctly. If you need to edit a line, highlight the row, then click the **pencil** icon.



   a. A pop-up will appear with the line information. Edit as necessary, then click **OK**.

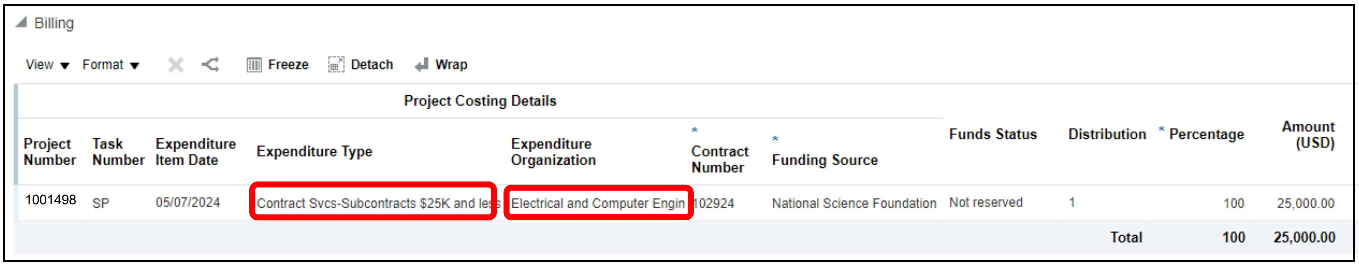


3. The **Deliver-to Location** and **Billing Charge Account** will auto-populate based on the information saved in your **Requisition Preferences**. *If you need to set up or change these preferences, see the Job Aids: Requisition Preferences – Charge Account COA-POETAF or Requisition Preferences – Shipping & Delivery Address*. These can be changed if needed.
   a. **These need to be reviewed and edited for EACH line in the requisition.**
   b. Highlight the first line then review.

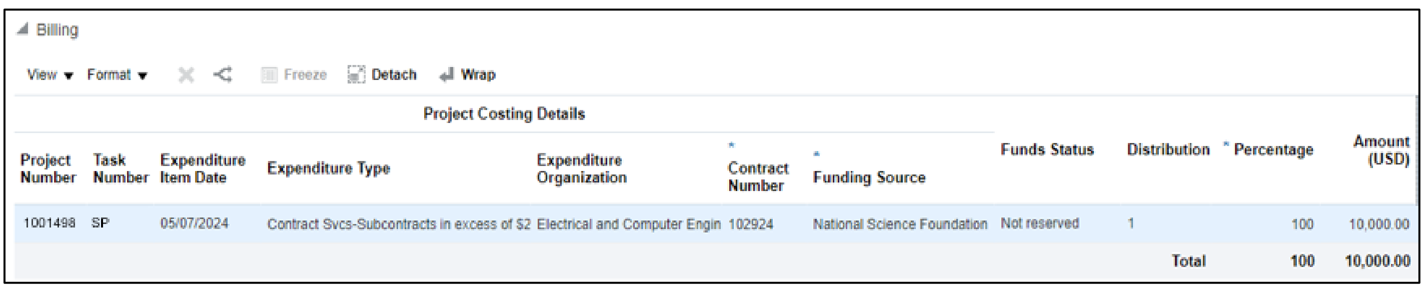


   c. Enter the **Project number**. The Task, Expenditure Item Date, Contract Number and Funding Source will auto-populate based on the Project number entered.

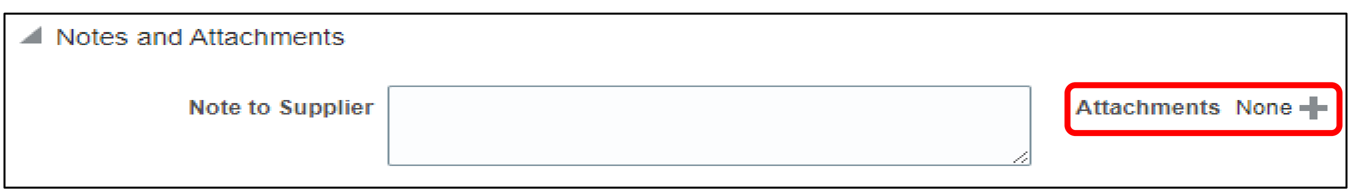
d. For contracts over $25,000, **Line 1** should have the **Expenditure Type** of **"Contract Svcs-Subcontracts 25K and less"**
e. For contracts over $25,000, **Line 2** should have the **Expenditure Type** of **"Contract Svcs-Subcontracts in excess of 25K"**
f. The **Expenditure Organization** does not auto-populate when the Project Number is entered. The URA needs to select the relevant organization.
g. The Percentage field defaults to 100. It is there in case a line item needs to be split by multiple charge accounts (COA or POETAF).

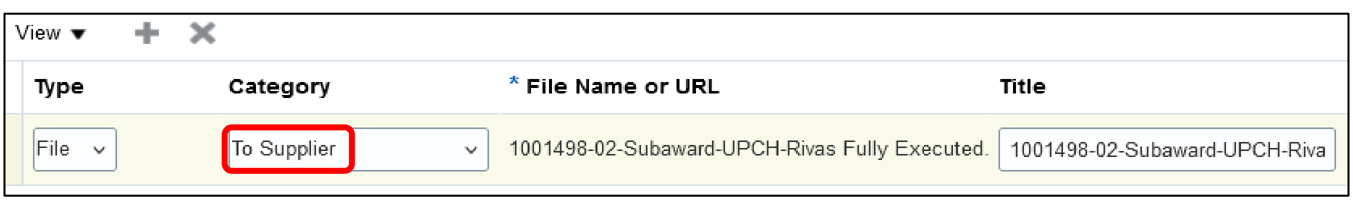


h. Next, click on the white space to the left of line 2 to highlight it. Now repeat the review of the Delivery and Billing sections
    i. Alternatively, you can highlight BOTH lines and use the **Edit Multiple Lines** feature. This allows changes to be made once and applied to all highlighted lines.



4. The **Notes and Attachments** section is just below the Billing section. This is where you will attach a second copy of the **executed subaward contract.** Ensure the category is set as **"To Supplier"**. Use the dropdown menu to change if necessary.

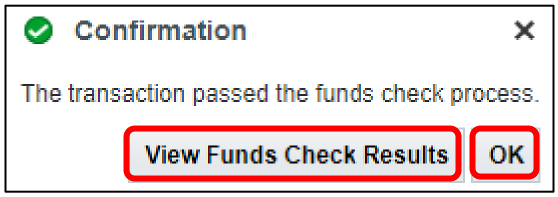




4. Submitting a Non-Catalog Requisition for Approval

1. After confirming that the requisition form is correct and complete, select **Check Funds** to confirm that budgetary funds are available.

2. On the pop-up, click **OK**, or you can select **View Funds Check Results** for the budget check summary.



3. Review the information and then click the **Submit** button.

4. On the confirmation pop-up, select **OK** to close or click **View PDF** to see a PDF version of your submitted non-catalog requisition.

5. The requisition is now pending approval. You can see your requisitions and the status of each under **Recent Requisitions.**

5. Additional Information

1. Requisitions charged to a Sponsored Project route to the URA for approval. Approval must be completed for the requisition to move through the system.
2. The Supplier is provided the Purchase Order once it is issued unless otherwise specified to the Buyer (Procurement).
3. Requisitions close automatically whenever the full Ordered amount has been met/invoiced. They can also be closed by request if no further invoicing is anticipated.
4. Supplements allow the ordered amount to be increased on the same Purchase Order. Refer to the Supplement Orders QRG for more information.