DEMO SESSION

January 29, 2019
WELCOME

What to expect at today’s demo session -

Live **system demonstrations** in Ignite

Q&A opportunity with the project team

**Today’s Session**

- Marketplace Requisition
- Non-Catalog Requisition
- Invoice Approval
SELF-SERVICE REQUISITIONS

REQUEST TO BUY

1. Marketplace
2. Goods - Non-Catalog
3. Services - Non-Catalog

REQUEST TO PAY

4. Payment Request
5. Goods - After the Fact
6. Services - After the Fact
MARKETPLACE REQUISITIONS

All Baylor employees will have access to the catalog-based shopping environment to simplify and streamline routine purchases.

TYPES OF GOODS AND SERVICES AVAILABLE

- Audio/Visual
- Awards and Prizes
- Books/General Retail
- Business Cards and Stationery
- Computer Hardware/Peripherals
- Food and Beverage
- Industrial and MRO
- Medical Supplies
- Office Furniture
- Office Supplies
- Promotional Goods
- Scientific and Research

Marketplace Transactions will become the primary method for making routine purchases.
Meet **John Smith** from the Libraries

**John Smith Shopper** needs to buy staplers through the marketplace.
NON-CATALOG REQUISITIONS

“Standard” requisitions for goods and services not available in the marketplace

- Requisitions are grouped as either non-catalog goods, or non-catalog services requisition
- Requisitions are categorized by procurement category rather than account code allowing for better visibility into purchases
# NON-CATALOG REQUISITIONS

## Search and Select: Category Name

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports Equipment</td>
<td>Athletics and Recreation Goods (e.g. football pads, balls, saddles)</td>
</tr>
<tr>
<td>Recreational Equipment</td>
<td>Athletics and Recreation Goods (e.g. kayaks, tents, climbing equipment)</td>
</tr>
<tr>
<td>Uniforms and Athletic Performance Accessories</td>
<td>Athletics and Recreation Goods (e.g. uniforms, sweats)</td>
</tr>
<tr>
<td>Nutritional Supplements</td>
<td>Athletics and Recreation Goods (e.g. vitamins, specialty nutrition shakes, etc.)</td>
</tr>
<tr>
<td>Training Equipment</td>
<td>Athletics and Recreation Goods (e.g. weights, treadmills, cones, etc.)</td>
</tr>
<tr>
<td>Textbooks</td>
<td>Books, Journals, Magazines, and Databases Goods (e.g. books used in classes)</td>
</tr>
<tr>
<td>Books, Movies, and Music</td>
<td>Books, Journals, Magazines, and Databases Goods (e.g. books, DVDs, streaming downloads)</td>
</tr>
<tr>
<td>Instructional Materials</td>
<td>Books, Journals, Magazines, and Databases Goods (e.g. maps, globes, models)</td>
</tr>
<tr>
<td>Real Estate</td>
<td>Construction, Design, and Real Estate Goods (e.g. purchase or lease)</td>
</tr>
<tr>
<td>Personnel Advertisements</td>
<td>Finance, HR, and Benefits Goods (e.g. LinkedIn, ads in The Chronicle)</td>
</tr>
</tbody>
</table>

### Parent-level Category

- **Procurement Category**

### Example Items

- Athletics and Recreation Goods (e.g. football pads, balls, saddles)
- Athletics and Recreation Goods (e.g. kayaks, tents, climbing equipment)
- Athletics and Recreation Goods (e.g. uniforms, sweats)
- Athletics and Recreation Goods (e.g. vitamins, specialty nutrition shakes, etc.)
- Athletics and Recreation Goods (e.g. weights, treadmills, cones, etc.)
- Books, Journals, Magazines, and Databases Goods (e.g. books used in classes)
- Books, Journals, Magazines, and Databases Goods (e.g. books, DVDs, streaming downloads)
- Books, Journals, Magazines, and Databases Goods (e.g. maps, globes, models)
- Construction, Design, and Real Estate Goods (e.g. purchase or lease)
- Finance, HR, and Benefits Goods (e.g. LinkedIn, ads in The Chronicle)
REQUISITION APPROVAL OVERVIEW

Fiscal transactions include:

- Marketplace requisitions
- Non-catalog requisitions
- Expense reports

Department Approver

Review and approve fiscal transactions up to $25k

Division Approvers

Review and approve fiscal transactions within $25k - $100k

University Approvers

Review and approve fiscal transactions greater than $100K
NON-CATALOG REQUISITION REQUISITION APPROVAL DEMO

John Smith Shopper needs to buy furniture through a non-catalog requisition

Jane Department Approver will review and approve John Smith’s requisitions
INVOICE APPROVAL DEMO

Accounts Payable receives and enters invoices

John Smith Shopper reviews and approves the invoice
THANK YOU FOR JOINING

Today's Demo Session
• Marketplace requisitions
• Non-catalog requisitions
• Invoice approval

RAFFLE DRAWING
Congrats to the lucky winner!

QUESTIONS?
• Submit through Mentimeter
• Email ignite@baylor.edu if you would like a direct reply
• Frequently asked questions from today's session will be posted on the Ignite website

UPCOMING DEMO SESSIONS
Check the Ignite website for topics and dates