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?
- 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:
- Showcases: where you will find suppliers grouped by category. Some category examples include Scientific/Lab Supplies, Electronics, and Office Supplies.
- Search Hosted Catalogs: 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 Marketplace. 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

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

2. 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.
5. On the **Review & Checkout** page, review the order and click **Submit Order**.

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**.
7. Select **Submit Requisition**.

3. **Shopping Using the Search Bar**

1. 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**.

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

   Note: these sections default to 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.

   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.
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
4. Select **Submit**.

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 ID number**.