

# PROCUREMENT: After the Fact Requests

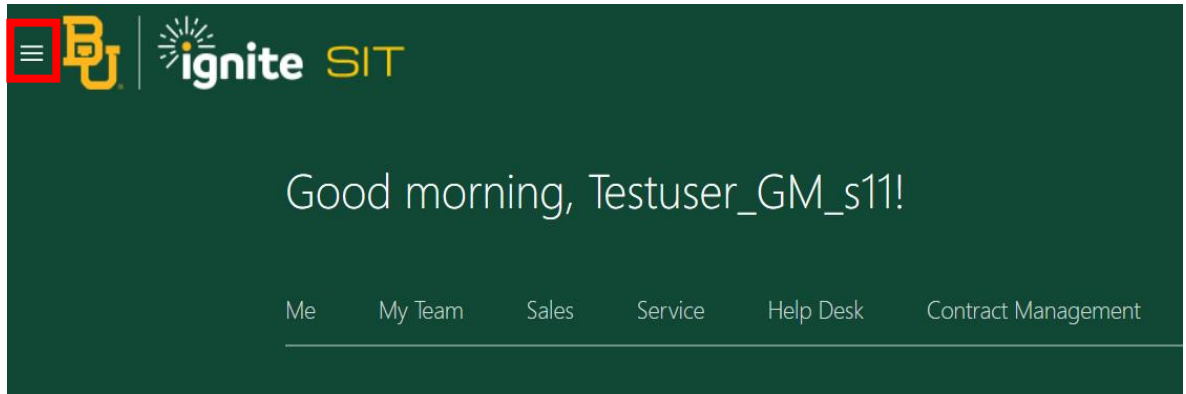
## Overview

- 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, it will then auto-source a PO and allow for the Supplier to be paid.
- 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.

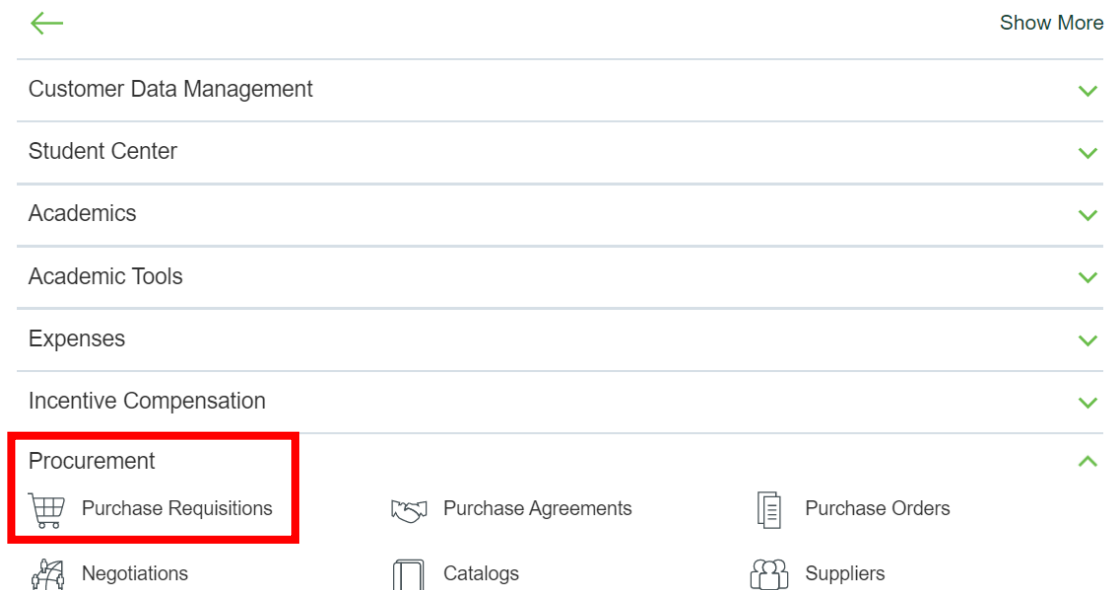
# PROCUREMENT: After the Fact Requests

## 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.

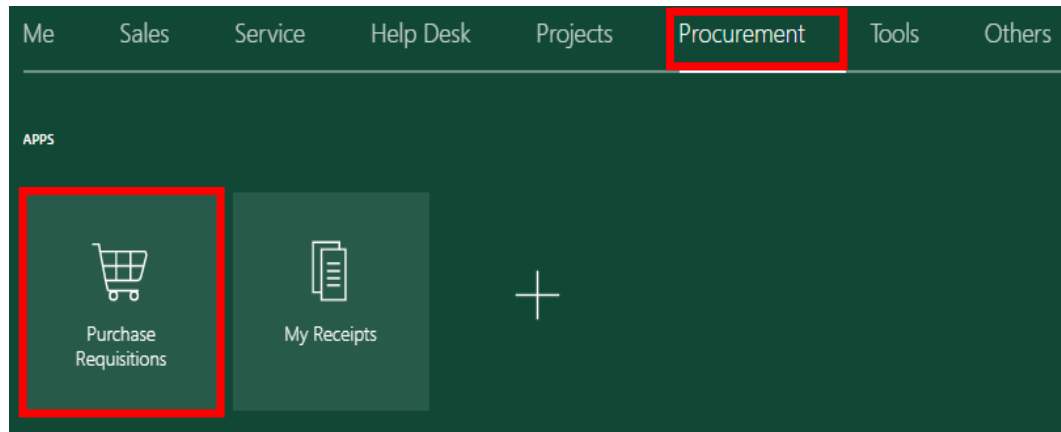


- b. Under the **Procurement** section, click the drop-down arrow and select **Purchase Requisitions** from the drop-down list.



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- 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		<a href="#">View More</a>
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

## 2. Submitting an After the Fact Request

- I. Enter the required fields for a Goods- After the Fact Request. For a Services- After the Fact Request you are only required to enter the description, category name, amount, and currency.
  - 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:** Unite 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	<input type="text"/>
* Category Name	<input type="text"/>
* Quantity	<input type="text"/>
* UOM Name	<input type="text"/>
* Price	<input type="text"/>
* Currency	USD <input type="text"/>

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2. 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

3. 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

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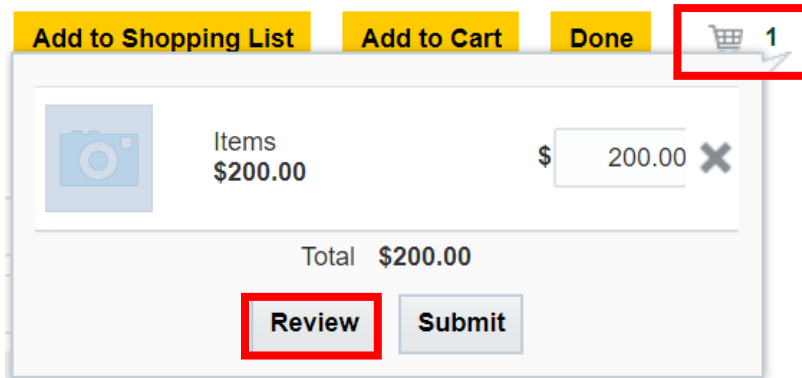
- Click the **Add to Cart** button.



Agreement

Supplier Nike USA Inc

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



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- 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.**
- Ensure the **Charge Account** and **Deliver-to Location** are correct.

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			
							500-50110-100-1000000-93722-220-00		2/19/20
Total									

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

Shop **Check Funds** Manage Approvals View PDF Save Submit

purchase order number required

Requisition Amount 400.00 USD

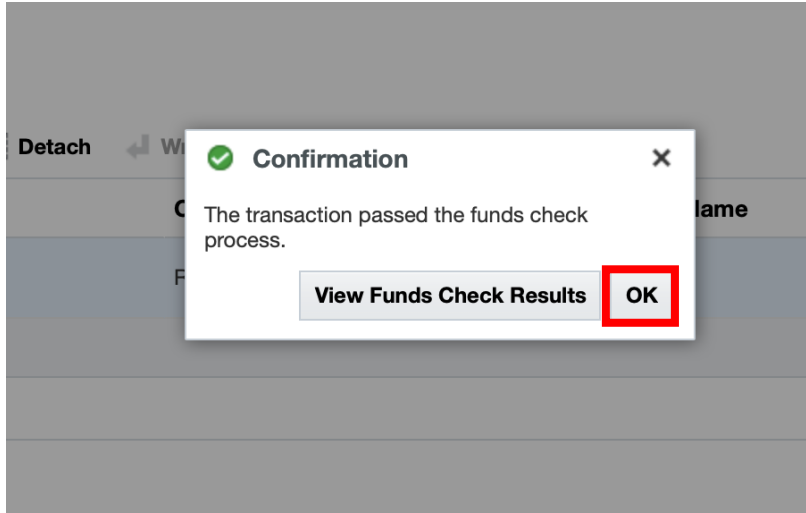
Approval Amount 400.00 USD

Funds Status Passed

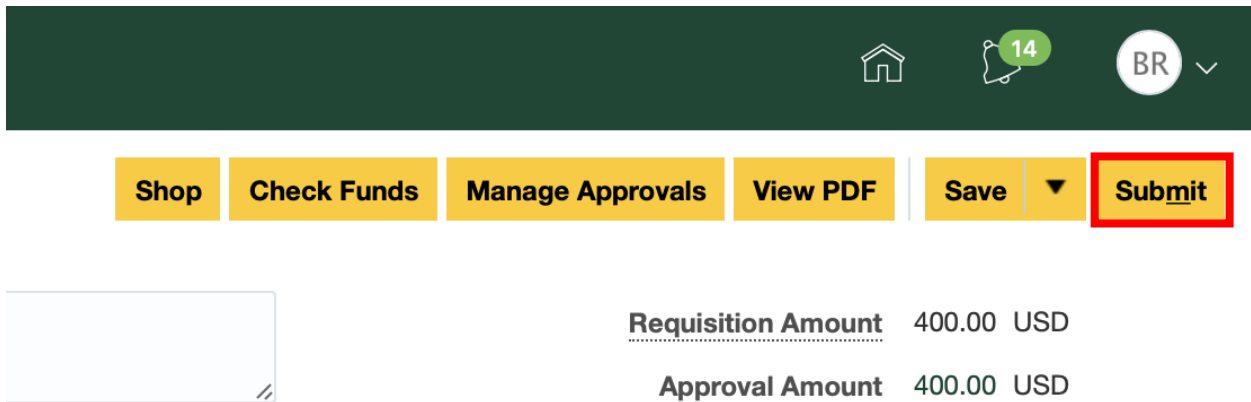
Attachments None +

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



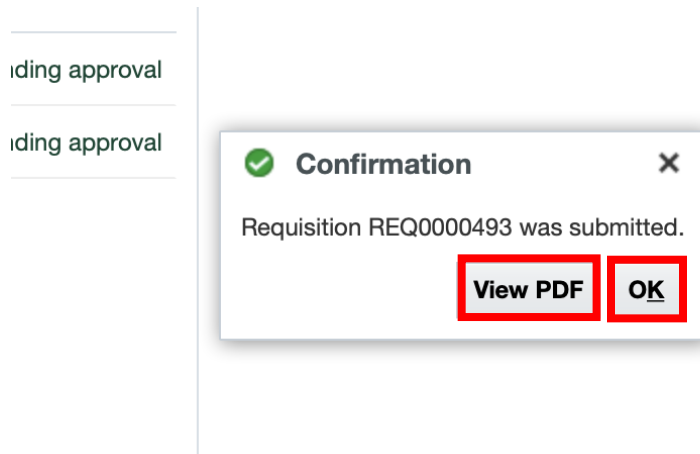
10. Click **Submit** for approval.





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11. 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**.



12. 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