

Submitting A Requisition Quick Reference Guide

OVERVIEW

There are two types of users that can shop: Shoppers and Shopper Plus. Shopper Plus users can submit their carts or carts assigned to them. When a requisition is submitted, this begins an approval process and budget check, then it is sent to Advantage for encumbrance. The Purchase Order is created and sent to the supplier.

CARTS

In Marketplace Central, there are two different types of carts:

- The **Active cart** is the cart currently being worked on by the user. The total dollar amount of the active cart displays in the upper right corner of the page. 
- Draft carts** represent items that have been selected, but are not yet ready for purchase.

ASSIGNING A CART

A user is allowed to assign a cart to another user. For example, a Shopper assigns their cart to a Shopper Plus because they cannot checkout. The Shopper Plus adds additional data and then submits the cart for the Shopper.

- Open your active shopping cart.
- Click  Search for the person to be assigned to by clicking on [Search for an assignee](#). Note: If you are not able to find the person, they may not be a user or do not have the permission to submit a requisition.
- Add a note for the assignee.

CHECKING OUT/SUBMITTING A REQUISITION

Note: this step assumes you have 1 or more items in your active shopping cart

The checkout process allows a Shopper Plus to complete a cart and submit the requisition.

- Click the Shopping Cart  to go to the active cart or open a cart that has been assigned to you.
- Click  or 
- Along the top of the screen, there may be items marked with a . Those are items that are still required to complete the requisition.

- Items that are complete will appear in the left panel with a 

- Verify your ship to address by clicking



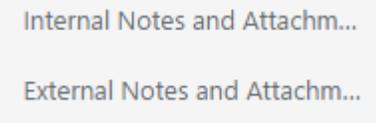
- Add the account codes by clicking



Click [edit](#) on the right side. Enter account codes and click



- Add additional information as a note by clicking in the left panel.



Internal Notes stay within the system for all users to see.

External Notes are for all users

and they appear on the purchase order that is sent to the supplier.

Accounts Payable is able to see both Internal and External Notes.

Some examples of Internal and External Notes are quote #, invoice #, special shipping instructions etc.

- Once all the required fields are complete, you will see a **green check mark** at **Final Review**.



- In the event that you **do not** want to send the purchase order to the vendor, click **Summary** or **General** in the left panel. Click [edit](#) on the right side and a window opens.



At the [Special PO Processing](#) drop down list, select Do NOT Send PO to the Vendor.



- Click  to submit your requisition for approval.

Note: If you are not able to click this button, a required field is not completed. Click **Final Review**

again and add the missing information. You will see a

green check mark beside **Final Review** when your requisition is complete. If you are still unable to click the button, you may not have the correct permissions. Please contact Procurement for assistance.



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ADDING COMMENTS

Comments and Attachments can be sent “back and forth” between users and approvers during the approval process. Comments can be found in History as well.

1. Go to the left panel of the requisition and click **Comments**.



Note: If there are Comments already added to the requisition, you will see a number there too.



2. Click **Add Comment** on the right side. You are able to add comments/attachments to the requisition and, if desired, send it via email.



RETURNED REQUISITIONS

Several factors can trigger a requisition to be returned for review and re-processing. The status and reason for return is captured in the requisition's History.

1. Click on the  along the left Navigation Bar.

Select **My Carts and Orders**.

2. Click **View My Draft Carts** to see your returned requisitions. Click on the **Shopping Cart Name** to open it.

Look for **History** in the upper right corner. The requisition's History lists the reason that the requisition was returned.

CANCELLING A REQUISITION

A Shopper Plus can cancel a requisition during the approval process **before** it becomes a purchase order by withdrawing it.

1. Search for a pending requisition. Pending requisitions also can be found by clicking the down arrow next to your name.

Note: requisitions that have a **green check mark**  before the number are **no longer pending** and cannot be withdrawn.

2. Click the **number** of the requisition to be cancelled to open the requisition.

3. Look for **Document Actions** on the upper right.

4. Click **Withdraw Entire Requisition**. You will be prompted to add a note that explains the reason for the withdrawal.

CHECKING STATUS

The Status of your requisition can be tracked by a **Shopper Plus**.

1. Search for a pending requisition. Pending requisitions can also be found by clicking the down arrow next to your name.

Note: requisitions that have a **green check mark**  before the number are **no longer pending** and have moved to the next step.

2. Click the requisition number that you would like to track.

3. Select **Summary** along the left panel.



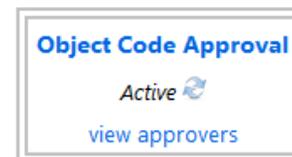
4. The **Status** will appear like this:



5. Approval status can be viewed by clicking **PR Approvals** along the left panel.



The Approval Workflow will appear. Here you will be able to see each approval step and who the approver(s) are.



6. Click **View Approvers** to see the person(s) that will be approving.