Creating and Approving a Catalog Requisition

As a Requisitioner, you may create a requisition by using the on-line vendor catalogs, called Punch-out Sites, featured on the BuyWays Home/Shop page, or by creating a Non-Catalog order. You will find instructions below for creating a catalog requisition. If you are a departmental approver, once you have submitted your requisition and have checked to see that it has passed the budget validation process, you may need to approve the requisition.

Do not create a requisition in BuyWays until you have set up two shipping addresses in your BuyWays Profile, one for Central Receiving and one for Desktop Delivery.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Log in to BuyWays</strong></td>
</tr>
<tr>
<td></td>
<td>• Navigate to UMass BuyWays (<a href="http://www.umb.edu/it">www.umb.edu/it</a> &gt; Getting Services &gt; Campus Administrative Systems &gt; BuyWays Production)</td>
</tr>
<tr>
<td></td>
<td>• Enter your campus email user ID (firstname.lastname only) and password.</td>
</tr>
<tr>
<td></td>
<td>• Select the Boston campus.</td>
</tr>
<tr>
<td></td>
<td>• Click Login.</td>
</tr>
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</table>

The BuyWays Home page will open.
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<tbody>
<tr>
<td>2.</td>
<td><strong>Create a New Cart and Give It a Name</strong></td>
</tr>
</tbody>
</table>

Point your mouse to the shopping cart icon on the left border of the page. Point to My Carts and Orders. Click on **Open My Active Shopping Cart**.

Click ![Create Cart](image) in the top left corner of the page.

A new cart will open, identified by default with today’s date and your employee ID.

**Important:**
Click in the default name to rename the cart or to add a meaningful identifier.

Click ![Update](image).

This cart will now become your **active** cart, displayed in the upper right corner of the page.

Click on the ![Click here to start shopping](image) link in the center of the page. You will be returned to the Home/Shop page.
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</table>
| 3.   | **Select the Catalog Vendor**  
Click on the vendor you wish to use in the Showcased Vendors section.  
Be alert for a security message asking you if you wish to view non-secure data.  
The text of the message will vary with your web browser. **Select the appropriate response to view all data, not just the data delivered securely.**  
The supplier’s web site will open, displaying products with special UMass contract pricing. |
| 4.   | **Fill the Vendor’s Shopping Cart**  
Since each vendor’s web site will be unique, you will need to identify how to search for an item, adjust the quantity, add an item to your shopping cart, view the shopping cart, check out and return to BuyWays.  
Note: If you would like to exit from the vendor’s web site without completing your shopping, click on **Cancel Punch-out** in the upper right corner.  
When you have finished shopping, click on the vendor’s link to check out.  
You will return to your BuyWays shopping cart. |
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</table>
| 5.   | Review Your Line Items  
Make any final adjustments to your shopping cart. |

To make changes to a shopping cart filled in the vendor’s punch-out site, you are required to return to the vendor’s web site.

Click on the **MODIFY ITEMS** link above the first line item at the top left, as shown below.

![MODIFY ITEMS link](image)

Follow the vendor’s instructions to change your order and return to BuyWays.

**Important:**
Do you see any line items for another vendor or belonging to a previously-created shopping cart?

If you forget to create a new cart or you create a new cart and forget to rename it (see Step 2) and you have one or more unnamed draft carts that you previously created but did not complete or remove, the line items in the draft carts will appear in your current active cart.

What to do? You may either permanently remove the items you do not want or you may move these lines to a new cart, so you can continue processing your active cart and return to the draft cart later.

**To remove line items:**
- Click the checkbox at the far right of each line you want to remove.
- Click in the Perform an action on (1 items selected) dropdown.
- Click **Remove Selected Items**.
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<tr>
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<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>To move the line items to a new cart:</td>
</tr>
<tr>
<td></td>
<td>- Click the checkbox at the far right of each line you want to move.</td>
</tr>
<tr>
<td></td>
<td>- Click in the Perform an action on (1 items selected) dropdown.</td>
</tr>
</tbody>
</table>
|      | - Click **Move to Another Cart.**<br><br>
|      | ![Perform an action on (2 items selected) dropdown](image)
|      | - A box will appear asking you to select the cart to which you want the line items moved. |
|      | - Select the cart and click **Move**. A confirming message will appear. |
|      | ![Select the appropriate cart to which the selected line items are to be moved](image) |

**Hint:** Always create a new cart and rename it each time you begin a requisition.
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</thead>
<tbody>
<tr>
<td>6.</td>
<td><strong>Enter Contract and Commodity Codes</strong></td>
</tr>
</tbody>
</table>

   In each line item, if you see a **Choose contract** link, click to select the contract, then click OK.

Note: Office supply contract information will appear automatically.

To copy the same contract information to other lines in your requisition, click the **copy to other lines** link. The Contract Association box will appear, listing the other lines in the requisition.

Click in the check boxes on the right to select the lines.

![Contract Association](image)

Click **Copy**. The contract information will now appear in each selected line.

Each line item must have the correct Commodity Code.

For each line item, click the **Commodity Code** dropdown menu and select the appropriate product type. This is a required field.

**Note:** To locate the correct commodity code and account code for an item:
- On the left side of the BuyWays Home/Shop page, click the Account Code/Commodity Book link.
- On the right side of the Account Codes page, click the University Account Codes pdf link.
- Right-click on the document and select Find.
- Enter a description of the item you are purchasing (for example, office).
- Click the right arrow to move through the document from one instance to the next.
- When you locate the correct entry, you will find the Commodity Code to use. Also make a note of the Account Code, which you will be required to enter on another page of the requisition.
- To return to your shopping cart, click the active cart in the menu at the top right, then click View My Cart.
If several or all of your line items require the same Commodity Code:
  o Click the **Select All** check box at the right above the first line to select all lines or click in the checkbox to the right of each line to select those with the same Commodity Code.
  o Click the **Perform an action on** dropdown menu and select **Change Commodity Code**.
    - Select the appropriate Commodity Code from the list.
    - Click **Save**.

Click **Proceed to Checkout**
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<table>
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</tr>
</thead>
</table>
| 7.   | Complete the Requisition  
The checkout workflow bar will be displayed. The step you are currently on will be in a different color from the rest of the tabs. In each tab ![indicates an item that needs your attention and ![indicates an item that is optional or already completed. The system will automatically take you to the first item you need to complete.  

**Shipping**  
Since you have already set up more than one shipping address in your profile, you need to select the appropriate shipping address.  
Click **Edit** in the Shipping box in the center of the page.  
The Ship To box will appear.

![Image of the Ship To box]  
Click the **select from your addresses** dropdown menu. Select the address.  
If you are purchasing goods from the University’s contract office supply vendor, you must select Desktop Delivery. For other catalog vendors, select Central Receiving. If you are purchasing from Home Depot and you want the South Bay store to hold your items for pick-up, select the address you created for this purpose.  
Click **Save**.  
Your next step will be to enter accounting codes (speedtype and account code).
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td><strong>Enter Speedtype and Account Code</strong></td>
</tr>
<tr>
<td></td>
<td>Click on the <strong>Accounting Codes</strong> tab at the top.</td>
</tr>
<tr>
<td></td>
<td>Click on <strong>Edit</strong> at the far right of your screen, under the gray Accounting Codes bar, if <strong>one</strong> speedtype and <strong>one</strong> account code will apply to <strong>all</strong> lines of your requisition.</td>
</tr>
<tr>
<td></td>
<td>If your line items require different speedtypes and/or account codes, scroll down to your list of line items and click on the <strong>Edit</strong> button to the right of each item. For example, if you have a line for delivery costs, you will need to enter the account code for delivery costs.</td>
</tr>
</tbody>
</table>
|      | Enter the appropriate speedtype. The 6-digit speedtype must be followed by **–B**  
Example: 123456-B  
Enter the correct account code, followed by **–B**  
Example: 734200-B  
Click **Save**. There is no need to enter the Fund or Department. |
|      | Note: the **B** must be in upper case. If you forget to add **–B**, you will not be able to proceed to the next step until you enter the speedtype and account code correctly. |
|      | Review your Fund, Department and Project/Grant chartfields to make sure you entered the correct SpeedType. |
|      | **Split Funding or Multiple Account Codes**  
Follow these steps if you wish to charge all of your items or selected line items to more than one speedtype. |
|      | If all of your line items will be charged to the same speedtypes and require the same account code, click **Edit** at the far right of your screen, under the gray Accounting Codes bar.  
**or**  
If you will be charging each line item to different speedtypes scroll down to your line items and click **Edit** at the far right of each line. |
|      | Click **add split** at the far right of the highlighted box.  
You now have two fields for speedtypes and account codes. |
|      | If you need to split the requisition among three or more speedtypes, click **add split** again. |
### Step 2: Enter the speedtypes and account code in each field.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Speedtype</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMBOS</td>
<td>100779-B</td>
<td>734200-B</td>
</tr>
<tr>
<td>UMBOS</td>
<td>100014-B</td>
<td>734200-B</td>
</tr>
</tbody>
</table>

At the far right, click on the % of Price dropdown menu to indicate whether you want to split the charges by percent of price or percent of quantity.

![% of Price dropdown menu](image)

The screen will refresh to provide you with the appropriate fields to enter the percentages.

Your percentages must add up to 100%.

You may click **recalculate / validate values** to show the Split Total.

Click **show monetary calculations** to display the dollar amount charged to each chartfield string.

<table>
<thead>
<tr>
<th>Project</th>
<th>% of Price</th>
<th>50</th>
<th>(418.65 USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>no value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<tr>
<th>Project</th>
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<tbody>
<tr>
<td>no value</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Split Total**: 100%

(837.29 USD)

Click **Save**.
### Step 9: Add an Internal Note and/or Attachment (Optional)

If you would like to add a comment that will **not** appear on the purchase order sent to the vendor, click on the **Internal Notes and Attachments**.

The Internal Notes and Attachments box will open on the left. Click on **Edit** at the far right of the box. In the text box enter your internal note and click **Save**.

If you wish to add an attachment, such as a quote, email message or contract for service, click **Add Attachments**.

Click on **Select files...** and double-click on the document. Click on **Save Changes**.

The note and/or attachment will be permanently stored with your requisition.
### Step 10. Add an External Note and/or Attachment (Optional)

External notes are printed on the purchase order. However, external notes and attachments will not be sent to catalog vendors. Because catalog vendors will not accept notes and attachments, you will see a message similar to this:

- **Note:**
  - Notes for the following suppliers are unsupported and will not be sent: W W GRAINGER INC
  - Attachments for the following suppliers are unsupported and will not be sent: W W GRAINGER INC

For a catalog vendor, click on **External Notes and Attachments** only if you are purchasing equipment.

**Equipment Orders Only:**

If you are purchasing equipment, such as a computer, use this space to enter the name and location of the person who will be getting the equipment, as in this example:

- **End user:** Tom Brady  
  - **Department:** Athletics  
  - **Location:** Clark, 1st Floor, Rm. 27

Click **Edit** on the right side of the External Notes and Attachments box, which will be on the right side of your window. Enter your text. Click **Save**.

You must enter an **external** note so the Property Department staff members can see the note containing the end user’s name and location when they print the purchase order. Internal notes do not print on the purchase order.

You may add an external attachment, although catalog vendors will not see it. Click **Add Attachments**.

Click on **Select files** ... and double-click on the document. Click on **Save Changes**.

The note and/or attachment will be permanently stored with your requisition.

You also have the option of moving an external attachment to an internal attachment. Click on the **Remove** dropdown menu just to the right of the attachment. Select **Move to Internal Attachments**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Remove</td>
</tr>
<tr>
<td></td>
<td>Remove</td>
</tr>
<tr>
<td></td>
<td>Move to Internal Attachments</td>
</tr>
</tbody>
</table>
### Step 11. Complete the Requisition

Click on **Final Review**. A summary of your requisition will be displayed.

To edit the requisition, click on the **Edit** button in the section you want to change. Make your change and click **Save**.

When your requisition is complete, click on **Submit Requisition**. The next page will confirm that your requisition has been submitted, provide links to next steps you can take and display a Requisition Summary.

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#### Requisition Submitted

**Next Steps**

You can view or print this at: Requisition 1453896, or via the Document Search page:

- View Approval Status
- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

**Requisition Summary**

<table>
<thead>
<tr>
<th>Requisition number</th>
<th>1453896</th>
<th>Quick View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition status</td>
<td>Pending</td>
<td></td>
</tr>
<tr>
<td>Cart name</td>
<td>2015-11-03 btrn16 01</td>
<td></td>
</tr>
<tr>
<td>Requisition date</td>
<td>11/4/2015</td>
<td></td>
</tr>
<tr>
<td>Requisition total</td>
<td>5,000.00 USD</td>
<td></td>
</tr>
<tr>
<td>Number of line items</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
### Step 12. View and/or Print Your Requisition

Under Requisition Summary, click on the **Quick View** link.

**Requisition Summary**

| Requisition number | 1453896 Quick View |

The **requisition summary** will open in a new window.

To print the requisition, click on **Print** at the top right. A printer box will be displayed where you can submit the requisition to your local printer.

To return to the requisition, click on the **requisition number link** at the top of the window. You will be on the **Summary** tab at the top left with all sections of your requisition displayed.

### Step 13. Verify that Budget Validation is Successful

Click on the **History** tab to display a list of all the actions affecting your requisition.

At the top of the list, notice whether the budget validation was successful. If budget validation failed:

- Note the error message.
- Make necessary changes to your requisition and resubmit it. Refer to the job aid Acting on a Returned Requisition.

If you see no error messages, click on the **PR Approvals** tab.
### Step 14. Review Approval Workflow

Click on **PR Approvals** to see who needs to approve your requisition.

If the requisition needs no approval or already has all the necessary approvals, you will see that a purchase order has been created. There is nothing more for you to do.

If your requisition is still awaiting approval, you may click on the **view approvers** link to find the names and email links of the approvers.

If your requisition requires departmental approval, the **Department Approval** box will be active.

If you are an approver for your department, follow the next step to approve the requisition.

If you are **not** a departmental approver, the approver for your department will receive an email notification. There is nothing more for you to do.
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<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>15.</td>
<td><strong>Approve Your Requisition</strong></td>
</tr>
</tbody>
</table>

At the top right corner of the PR Approvals page, click on the **Available Actions** dropdown menu and select **Approve/complete step**. Click **Go**.

When all the necessary approvals have been secured, your requisition will become a purchase order and will be dispatched electronically to the vendor.