REQUESTOR QUICK START GUIDE

REQUESTOR OVERVIEW

Requestors are responsible for making or confirming appropriate purchasing decisions, validating relevant requisition information, submitting carts to Approvers, and managing the requisition process.

Only Requestors can submit carts into workflow to be approved. They can build their own carts or submit carts into workflow that have been built by others and assigned to them for review and submission.

TRANSACTION TYPES

Requestors have several options for initiating requisitions from the Buy-to-Pay landing page:

Purchasing goods or services:
- **Hosted catalogs: Preferred Option.** Search for goods and services by entering the goods or services you are looking for in the search box in the *Shopping* section
- **Punchouts**: **Preferred Option.** Click the supplier you want to shop from (WB Mason, VWR etc.) and the supplier's site will open
- **Non-catalog request**: For items or services not found within a catalog or punchout, including standing orders. Click *NON-CATALOG ITEM* in the *Shopping* section. Refer to the Shopper Quick Start Guide for more detail

Completing Forms:
- **Payment Requests (PR):** Used for certain transaction types listed on the form including fellowships, honoraria, refunds and licensing fees. Check with your local finance office for any Tub-specific guidelines
- **Non-Employee Reimbursements (NR)**: Used to process reimbursements for non-employees
- **Vendor Justification Forms (VJF)** Must be completed and attached to all requisitions over $10,000 on sponsored funds
- **Independent Contractor Questionnaires (ICQ):** Must be completed, signed (by your tub's Independent Contractor Approver) and uploaded to Buy-to-Pay **BEFORE** the requisition is submitted for approval

CART MANAGEMENT

CART STATUSES
- **Draft** – contain items that have not been submitted into workflow (incomplete or returned by Approver)
- **Assigned** – prepared by other Shoppers or Requestors and sent to the Requestor
  - Assigned carts can be returned with comments if more information needed, or submitted for approval
- **Submitted** – a cart that has been submitted for approval and become a requisition
  - Refer to the Checking Approval Status quick reference guide for more details

CART ACTIONS
- **Edit Cart Name** – Change the default cart name for easier organization
- **Submit Request** – Submit the cart into the approval workflow which turns it into a requisition
- **Assign** – Search the directory for any user to send an email notification with a link to a draft cart
- **Copy to a New Cart**– Copy contents from an existing requisition into a new cart
- **Set up Substitute Requestor** – Substitutes can be added to assigned carts when needed: for example, when a Requestor is out of the office

VALIDATING REQUISITION INFORMATION

Requestors are responsible for entering or reviewing the following requisition information:

- Appropriateness of purchasing decision
- Appropriateness of purchasing method (Non-catalog, PR etc.)
- Accuracy of Ship to Address: Refer to Choosing a Shipping Address for more details
- Accuracy of Chart of Account information
- Internal and/or External Notes and Attachments, if applicable
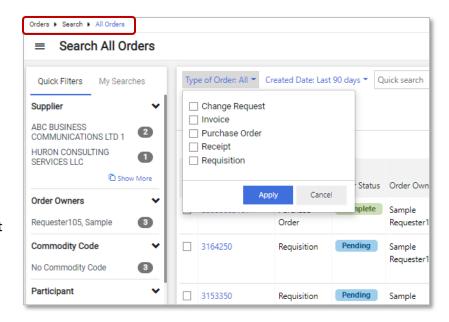
ORDER PROCESS MANAGEMENT

Requestors can monitor and manage the order process, viewing status information using document search.

Requisition – A draft cart submitted into workflow becomes a requisition

Purchase Order – A requisition that has been approved by all applicable approval levels becomes a purchase order

Invoice – Once a supplier invoice has been uploaded into B2P, it is visible

- **Hold for Match**: Notification that a receipt should be processed

- **Match Exception**: Escalation if a receipt is not processed in a timely manner

- **CoA Validation**: An automated validation is done by the system before posting to the General Ledger

QUICK REFERENCE GUIDE LINKS

Click the links to access associated quick reference guides. Visit the B2P website for more quick reference guides and training resources.

- Checkout Process
- Adding an Ad Hoc Approver During Checkout
- Receiving
- Viewing Invoice and Payment Information
- Creating a Change Order
- Amount Based and Standing Order Guidance
- Creating Chart of Account Favorites
- Managing Notifications

Refer to the following blog post on Tips and Tricks for Managing Approval Folders for guidance on how to use cart names, comments, and email notifications to help specific Approvers identify if an item is for their attention.