Requisitioner Basics
Quick Reference Guide

1. Requisitioner Overview

Requisitioner’s Role

A Requisitioner is anyone who has been given permission to shop and submit shopping carts (their own or others) for approval.

If you are a Requisitioner, you have been given permission to:

- Create a Shopping Cart.
- Complete a cart for a shopper by completing the required information such as the ship to or speedtype.
- Submit a shopping cart for approval.

As a Requisitioner, you can shop in UMass BuyWays using Punch-out Catalogs and create Non-Catalog orders. A Punch-out catalog takes you to an individual supplier’s website and allows you to shop only at that site. Non-Catalog orders allow shopping for items that are not in a Punch-out catalog.

Creating Your Own Virtual Shopping Cart

A virtual shopping cart holds various items you have selected or entered for purchase. Carts are capable of holding items from multiple suppliers. Your Cart becomes a Requisition after you have submitted it to workflow.

- The shopping cart is located in the upper right hand corner of the BuyWays homepage.
- A cart is automatically given a unique name based on the User Name and the date it is created.
- It also shows the number of items in the cart and the dollar amount.

NOTE: See the Shopper’s Quick Reference Guide for additional shopping topics including:

- Adding Items from Punch-out Catalogs
- Copying/Moving Items from a Cart
- Removing Punch-out Items From Your Shopping Cart
3. Finding, Accessing, and Viewing Assigned Carts

Once a Shopper’s cart is submitted, as a Requisitioner, by default, you will receive an email notification that a cart has been assigned to you and needs to be reviewed/completed/submitted.

**NOTE:** The shopper is **NOT** required to enter any required information other than a vendor and line items. All additional required information **MUST** be entered before the cart can be submitted to the Approver.

Requested Items, Ship-to Addresses, Commodity codes, Accounting Codes (at header and line level), Comments, and Attachments should be reviewed and/or changed:

- The Requisitioner is able to edit any of the information in the cart, and can choose to return the cart to the Shopper to have them make changes.

There are a couple of ways to find orders needing review:
1. Click the **Action Items** hyperlink, and then **Requisitions Needing Approval**.

   or

1. Click the **Orders & Documents** icon.
2. Click the **Approvals** link and then the **My Approvals** link.

Carts assigned to you are located in the **Drafts Assigned To Me** section of the next screen.

4. Completing the Requisition

BuyWays allows Requisitioners to submit their own orders or orders assigned to them by a Shopper. Submitting a requisition order may begin the approval process.

From any page:
1. Click the **Action Items** link.
2. Click the **Carts Assigned to Me** link under **My Assigned Approvals**

   ![Action Items](image)

   ![Carts Assigned to Me](image)

3. Click on the **Shopping Cart Name** you want to complete.
4. Select **Modify Items** or **View Items** if you need to make changes to **line items** in a cart. (If a noncatalog order click the product description)
5. Click on the **Shopping Cart Name** link to view the items in the cart followed by the **Product Description** link to view more information about an item.

   **NOTE:** Standard cart changes such as removing and adding line items, and changing quantities is allowed. Once the requisition is open, the Requisitioner has the option to return the cart back to the shopper or Submit the Requisition.

6. Click the **Proceed to Checkout** button.
4. Completing the Requisition — Continued

Any errors with associated details, such as Shipping or Accounting Codes*, will be displayed with red triangle icon errors in the checkout workflow. These errors MUST be fixed before the cart can be submitted to the Approver.

If there are errors, correct them, update the information, and click the Save button. An overlay screen appears letting you know that you have successfully completed the requisition (see above image).

7. Click the Final Review or the Requisition Summary Tab.

8. Review the requisition and click the Submit Requisition button.

9. An overlay screen appears letting you know that you have successfully completed the requisition. Click the Final Review or the Requisition Summary Tab.

10. After reviewing the requisition, click the Submit Requisition button.

An overlay screen displays letting you know that you have successfully submitted the cart to the Approver.

Notice the Quick Links to some common actions on bottom of screen!

End of Procedure

*For additional information regarding Accounting Codes (budget information) see the “Assigning Budgeting Information” Quick Reference Guide.
5. Returning a Requisition

As a Requisitioner, you have the authority to change any or all items in a shopping cart. You may, however, return it to the Shopper and have them make the changes. To perform this task:

1. Navigate to the cart you want to review.
2. Click, Home/shop>Approvals>Carts assigned to me.
3. Click the Shopping Cart Name to return.
4. Click the Return Cart button.
5. Enter information into the Note: field informing the Shopper as to why the cart is being returned.
6. Click the Return button.

A message screen appears letting you know the cart has been returned to the Shopper.

If after reviewing the cart, you decide to return it to the Shopper to be changed and resubmitted,
4. Click the Return Cart button.

End of Procedure