Create Procurement Catalogs Requisition

This guide will cover:
- How to use the requisitioning process to order items using the Procurement Catalogs.
- How to shop within the marketplace tool and bring a shopping cart back to the requisition then follow the regular process flow for ordering goods.
- How to save and retrieve Procurement Catalogs carts.

Step One
Navigate to the Requisitions area of WyoCloud.

- Upon signing in, the homepage will display. Click on the Navigator button (three horizontal lines) in the upper left corner.

- Select Purchase Requisitions under the Procurement header within the Navigator.
Step Two
Navigate to the Procurement Catalogs, locate items and add to cart.

- The Purchase Requisitions screen is displayed.

The first step to completing any requisition is to update your Requisition Preferences. WyoCloud defaults the Deliver-to Location to the building you work in, you will need to change this to your department name to ensure proper delivery. For full details on how to complete this, see the Requisition Preferences Quick Reference Guide.

- There are two ways to enter the Procurement Catalogs:
  - Click on Shop by Category. Then select Procurement Catalogs – Shop Here.
  - Then click on Procurement Catalogs under Related Suppliers
  - OR click on the arrow below any item listed under Recent Purchases.

- The Procurement Catalogs shopping site will be accessed.
  - Note: If you would like to return to the Purchase Requisitions screen without adding anything to your Procurement Catalogs cart, click on the profile icon (next to the shopping cart icon) and select Return to ePRoc.
There are several ways to search the Procurement Catalogs for items. First, we will outline using the **key word search** located at the top of the main Procurement Catalogs page.

- Enter a **key word or words** then click the **magnifying glass** icon to search all available Procurement Catalogs at once.

The search can be further refined using any of the options located on the right side of the page. For example: manufacturer, supplier, price range, brand, category, etc.

- Once the item(s) are located and the **quantity** entered, click the **Add to Cart** button. Continue this process for all items to be included in the cart. **Note:** Items within a single cart must be from a single supplier prior to being added to a requisition.
- Alternatively, items from select suppliers (Punch out suppliers) can also be searched via a punch out to the supplier’s website. To search using this method, click on the desired supplier link from either the main page or Suppliers Tab (left side).

- Each supplier’s site will have a different look and feel. For some suppliers, such as CDW-G, recommended products are displayed directly on the supplier homepage. You may also search for specific product(s).
Once item(s) are located and the quantity entered, click the Add to Cart button. Continue this for all items to be included in the cart.
Click the Checkout button once the shopping is complete.

Click the Transfer Shopping Cart button to return the cart back into the system.

Procurement Catalog carts can be saved for easier shopping. The following three steps outline how to save a cart and access previously saved carts.

- After items have been added to the cart, hover your mouse over the Cart icon in the top right corner of the page. Select Save Cart.
Enter a name for the cart, then click **Save**.

You may view previously saved carts on the Procurement Catalogs homepage by scrolling down to the Saved and Shared Carts area. Once here you can click on the cart name to view details and add to new cart to purchase. After adding, follow the remaining steps to complete requisition.
If you would prefer to share your cart with another user instead of completing the requisition as outlined in the next steps, a share cart feature is available from the checkout screen.

- To share the cart with another user, go to the cart then instead of clicking on Checkout, click on **Cart Options** then **Share Cart**. You will be prompted to enter a user’s name (within UW).
- After saving the cart will show under the other user’s **Saved and Shared Carts** on the Procurement Catalogs homepage.

**Step Three**

Return shopping cart back to WyoCloud Financial Management.

- If you are not already on the shopping cart screen, click on the blue cart icon at the top of the page.
- Click the **Checkout** button to return the cart back to WyoCloud Financial Management.
Step Four
Complete Requisition.

- After selecting Checkout from the Procurement Catalogs, you will be brought to the Edit Requisitions page. The item(s) from your Procurement Catalogs cart will be contained within this requisition.
  - Note: If you had a requisition already open (not submitted), your Procurement Catalogs cart will be added to it. This is ONLY permissible if all items are from the same supplier.

- Update the Requisition details
  - Description should include description of item(s) and purpose of requisition.
  - In the Delivery area:
    - The Requester field defaults to the person creating the requisition.
    - Confirm the Deliver-to Location reads as your department’s name (not building name). If it does not, you must update your requisition preferences prior to submitting the requisition. See Requisition Preferences Quick Reference Guide.

- If purchasing a capital equipment asset with a value $5,000 or greater, the Asset fields must be completed or the requisition will be denied. The University defines capital equipment assets as any individual item which has a per-unit acquisition or fabrication/construction cost of $5,000 or more, is movable (not permanently affixed to a building), and has a useful
life of at least one (1) years. If you are not sure if it’s a capital asset, contact Asset Management 766-2302 (http://www.uwyo.edu/administration/fiscal/asset-management/).

- **Asset Owner** – An individual active in HCM that is not a student or retiree. Owner can be any faculty or staff member who is primarily responsible for the asset (i.e., if someone is looking for the asset, who could they contact?).

- **Asset Building** – This is a drop down/search selection to select the building name or address applicable to the asset location.

- **Asset Room/Location** – Describe where the asset will be housed (i.e., if one were to look for the asset, where could they find it?). This could be a room number within a building (ex. Room 402), type of location (Hallway East End of Second Floor), or name of location (Sheep Shed).

- **Update the Billing section.**
  - If paying by a grant, enter the Project Number and POET information. If this is for a subaward, please see the Subaward Requisition quick reference guide to ensure all fields are properly completed.
    - Enter the Project Number
    - Task Number – Will always be 1
    - Expenditure Item Date – Date of documentation or signature
    - Expenditure Type – Pick the correlating expenditure type
      - After selecting the Expenditure Type, the Charge Account string should update the natural account code. The expense class must be updated from the default (999). To change the
Charge Account, click on the icon with the magnify glass next to the account string field.

- Expenditure Organization – Organization that owns the grant
- All other fields should auto populate, but you should verify the information is correct:
  - Contract Number – Should be the same as the project number
  - Funding Source
  - Budget Date – Date the requisition is created
  - Percentage
  - Funds Status – Not reserved (funds will be validated later)
  - Amount – Should equal the total of this line of the requisition

- If paying through a non-grant account, confirm the defaulted chart string in the Charge Account field. **The expense class must be updated from the default (999).**
  - To change the Charge Account, click on the icon with the magnify glass next to the account string field.
  - Budget date should default to the date of creating the requisition
  - Percentage will default to 100 for the line
  - Fund Status will remain “Not Reserved” until the funds are checked towards the end of this guide
  - The total amount of the requisition line should default in the **Amount** field.

- In this area, notes to the supplier can also be typed.

- If the funding needs to be split between multiple funding sources, use the **split funding wishbone icon** to add additional funding lines.
- A new line will populate under the original line.

- Update all fields from the prior step for the new funding. The percentage and amount columns may need to be adjusted to reflect the appropriation of funding.

- Once all fields are up to date, click **Check Funds** in the upper right corner. A pop up notification will appear stating whether the funds passed or not.

- If you are ready to submit the requisition, select **Submit** in the upper right corner.
  - Note: You may also select Save then Save and Close to save and submit at a later time.
- The system will bring you back to the main requisitions page and a confirmation pop up window will display. Within the confirmation window, you may note the requisition number and view a PDF summary of the requisition number if you choose.
- The Requisition will now also show under your Recent Requisitions.

You have now completed the steps to Create a Procurement Catalogs Requisition.