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).

**Note:** UW has negotiated discounted pricing for several models of HP desktop and laptop computers from CDW-G. These business class computers meet the standards established by UW IT to function in our campus computing environment. To review and select these computers, go directly into CDW-G store inside the Procurement Catalog. If one of these computers do not meet your needs, please contact UW’s CDW-G account manager, Damir Karahodzich (damikar@cdwg.com or 877-376-5508), to discuss options. If an approved business class computer is not purchased, IT cannot guarantee functionality with our campus computing environment and support may be limited.

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 an 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 back to the Requisitions page. The item(s) from your Procurement Catalogs cart will be contained within your most recent requisition. Click on the description under the Requistion number to open.
  - 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.

- Click on Actions, then Edit.
- This brings you to the Edit Requisition screen.
- Here you can update the Requisition **Description** and update the **Billing** information, just as you can for non-catalog requisitions. Be sure to confirm and update the **Charge Account** as needed (including replacing the default 999 Expense Class).

Once all fields are up to date, click **Check Funds** in the upper right corner.

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.