

Completing a Cart Assigned to You (Creating a Requisition)

This topic describes the procedures for completing a Requisition in UMASS BuyWays.

Upon completion of this topic, you will be able to:

- Complete a cart assigned to you
- Create a Requisition

Procedure

Consider this scenario:

Your goal is to complete a Requisition that has been assigned to you.

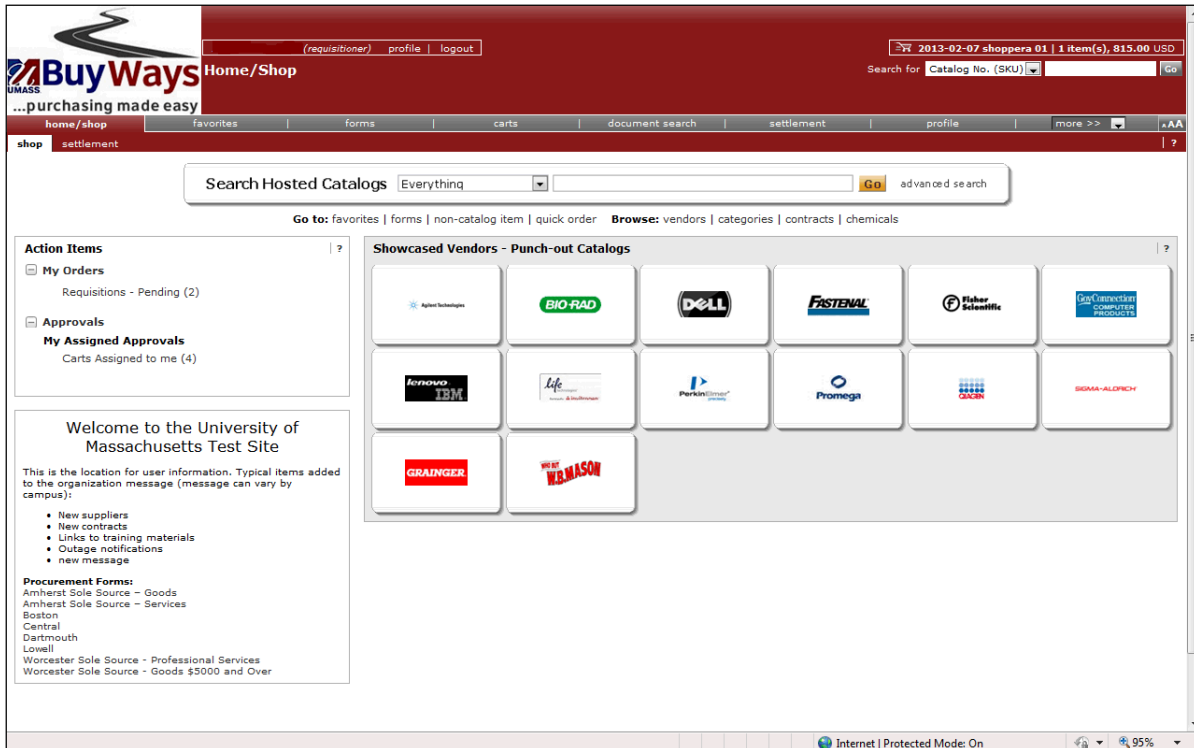
Key Information:

Shopping Cart Name: 2013-02-07 Shopper 02

Commodity Code: Equipment - Information Technology (All)

Quantity: 2

Step	Action
1.	<p>UMass BuyWays allows Requisitioners to submit their own orders, as well as orders assigned to them by a Shopper. Submitting a Requisition may begin the approval process.</p> <p>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.</p>



- Click the **home/shop** tab.

Under **Action Items**, click the **Approvals** link.
Approvals

Step	Action
3.	Under My Assigned Approvals , click the Carts Assigned to me link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Carts Assigned to me (4)</div>

Action Items

☐ **My Orders**

Requisitions

- Returned (2)
- Pending (10)
- Recently Completed (7)

Purchase Orders

- Pending (1)
- Recently Completed (4)

☐ **Approvals**

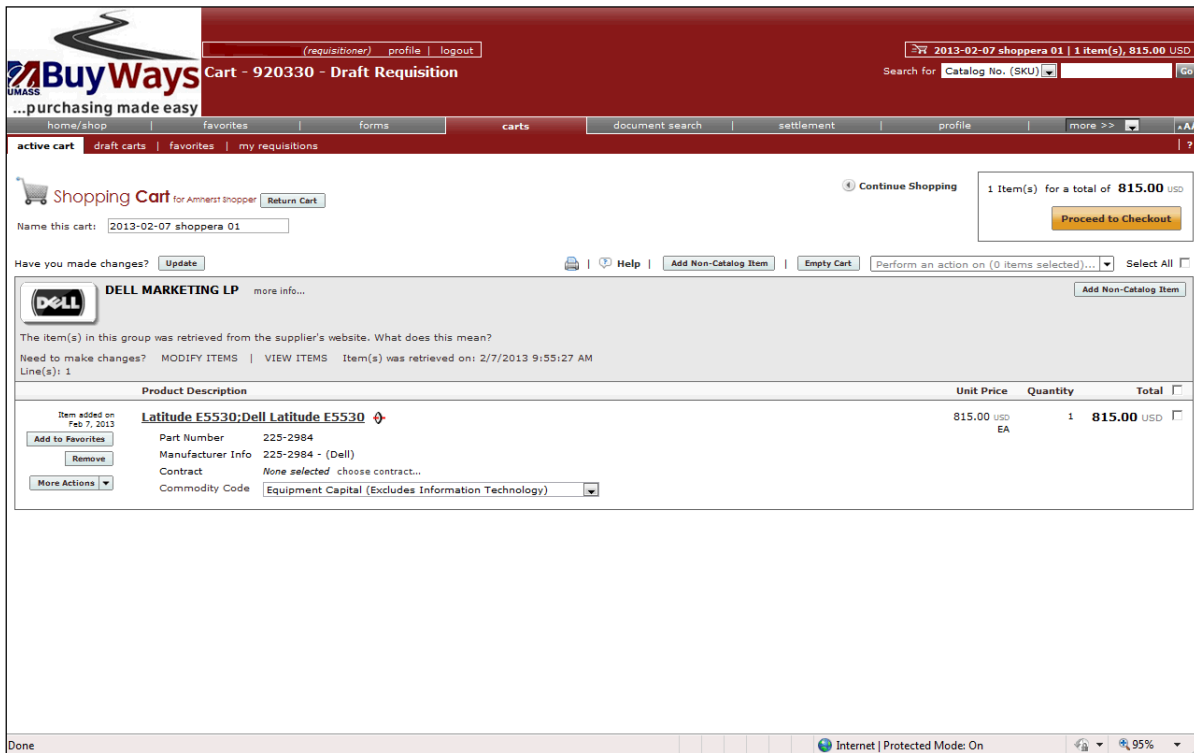
My Assigned Approvals


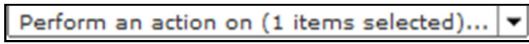

- ➔ Carts Assigned to me (2)
- Requisitions (2)

Drafts Assigned To Me		
Active Cart	Cart Number	Shopping Cart Name
	945467	2013-03-22 dtrn3 01
	927255	Process Req 1

4.	Locate the Shopping Cart Name you want to complete at the Drafts Assigned To Me section. Click the 2013-02-07 shoppera 01 link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">2013-02-07 shoppera 01</div>
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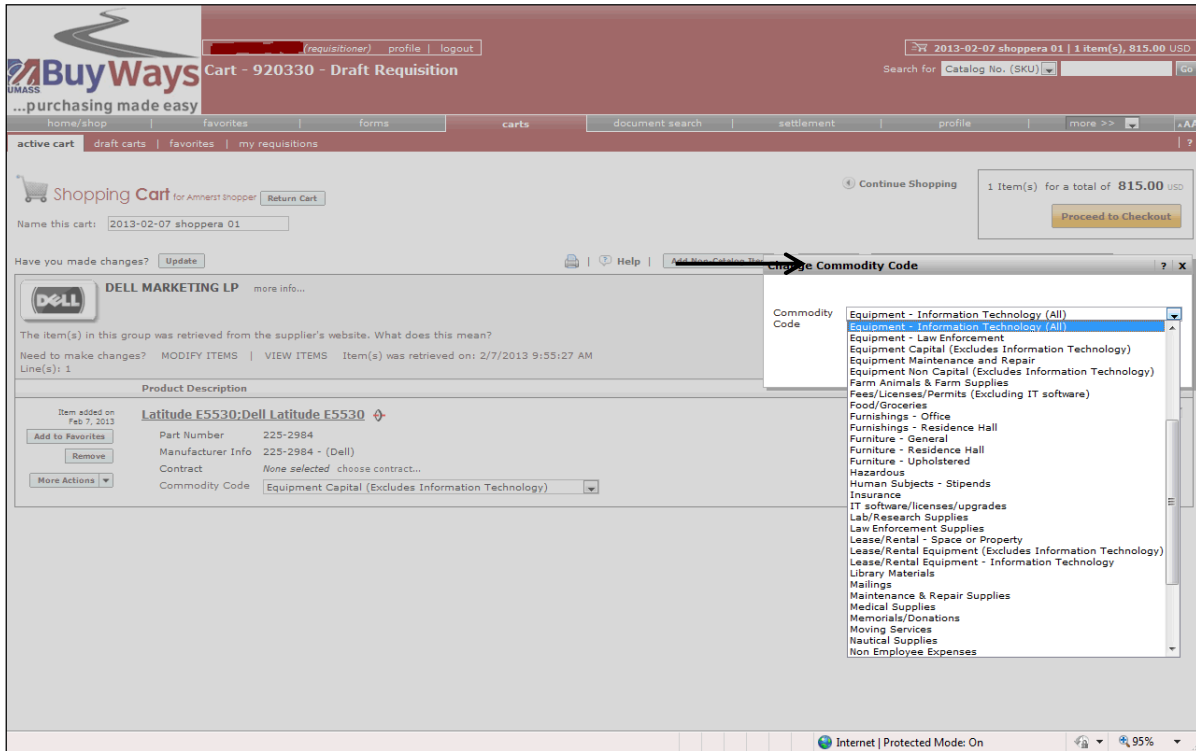
Step	Action
5.	<p>The item in this cart has been purchased from supplier, DELL MARKETING.</p> <p>Before this Requisition can be completed, the Commodity Code to the line item must be changed and the number of laptops ordered must be increased</p>



6.	<p>To change the Commodity Code, click the Checkbox option.</p> 
7.	<p>The “Perform an action on” drop-down menu activates.</p> <p>Click the List Item Arrow list item.</p> 
8.	<p>Click the Change Commodity Code link.</p> 

Step	Action
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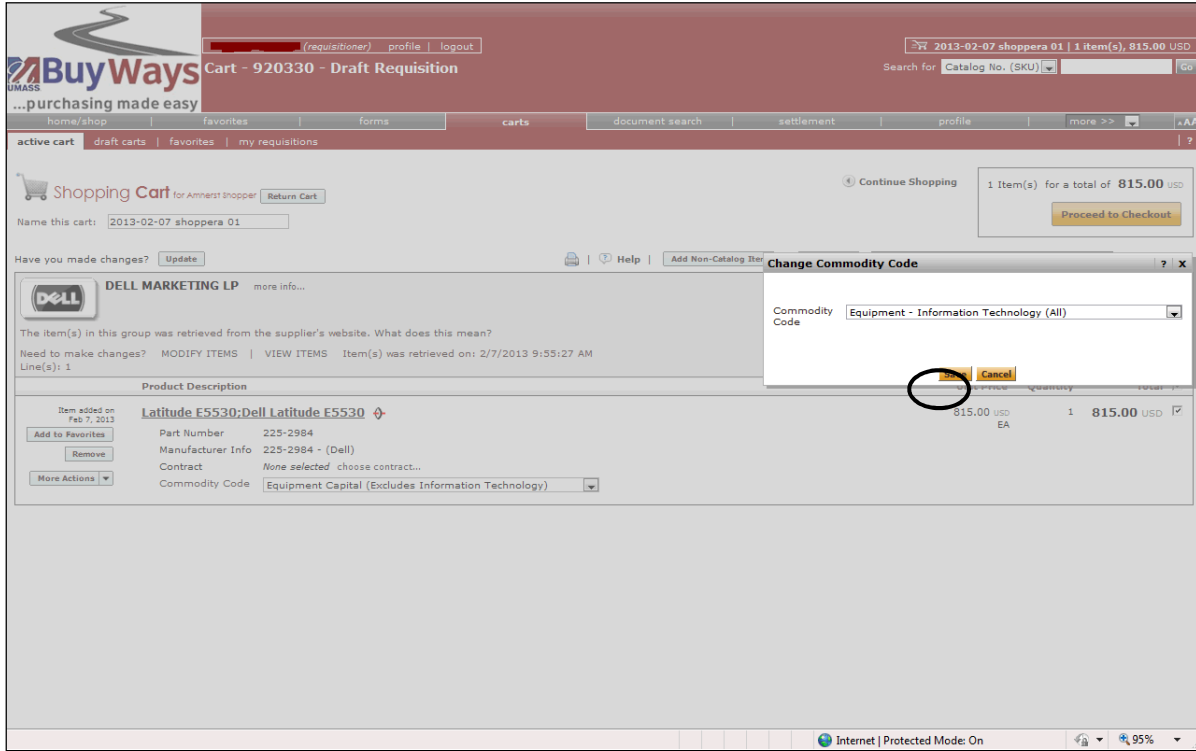
9. To assign the correct Commodity Code, click the **Checklist arrow** list item.

The screenshot shows the BuyWays web application interface. At the top, there is a navigation bar with the BuyWays logo and the text "UMASS purchasing made easy". The main header area displays "Cart - 920330 - Draft Requisition" and "2013-02-07 shoppers 01 | 1 item(s), 815.00 USD". Below the header, there is a shopping cart summary showing "1 Item(s) for a total of 815.00 USD" and a "Proceed to Checkout" button. The main content area shows a product listing for "DELL MARKETING LP" with a "Latitude E5530;Dell Latitude E5530" item. A dropdown menu is open, showing a list of commodity codes. The selected code is "Equipment - Information Technology (All)".

Step	Action
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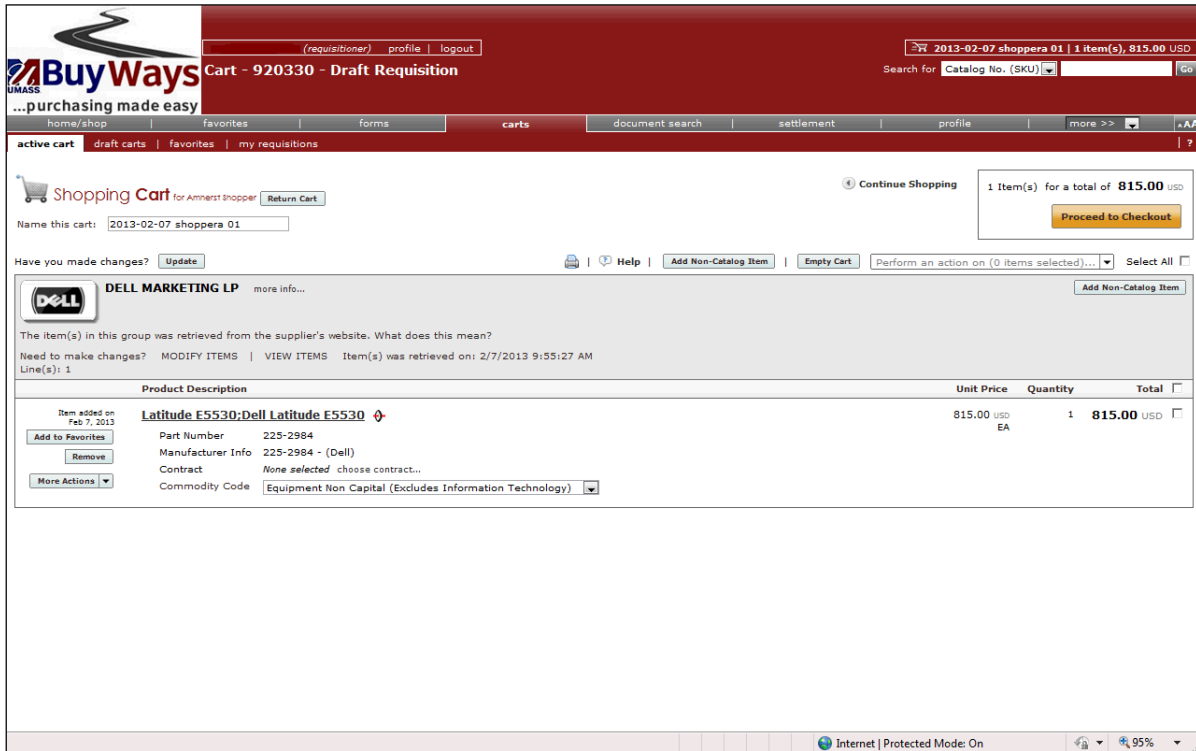
10. Click the **Equipment - Information Technology (All)** list item.



11. Click the **Save** button.



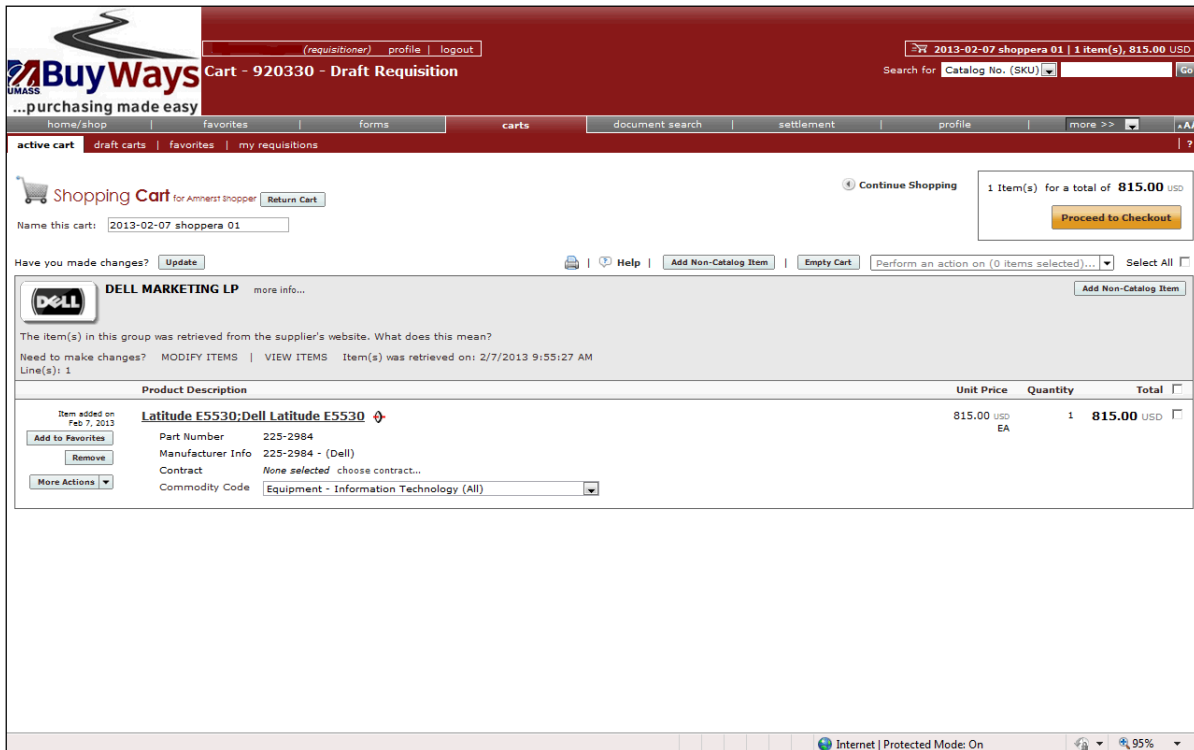
Step	Action
12.	The line item Commodity Code was successfully changed. Another way to change the Commodity Code is from the drop down menu list located under the item itself.



13.	Click the Drop-down arrow list item.
14.	Click the Equipment - Information Technology (All) list item.

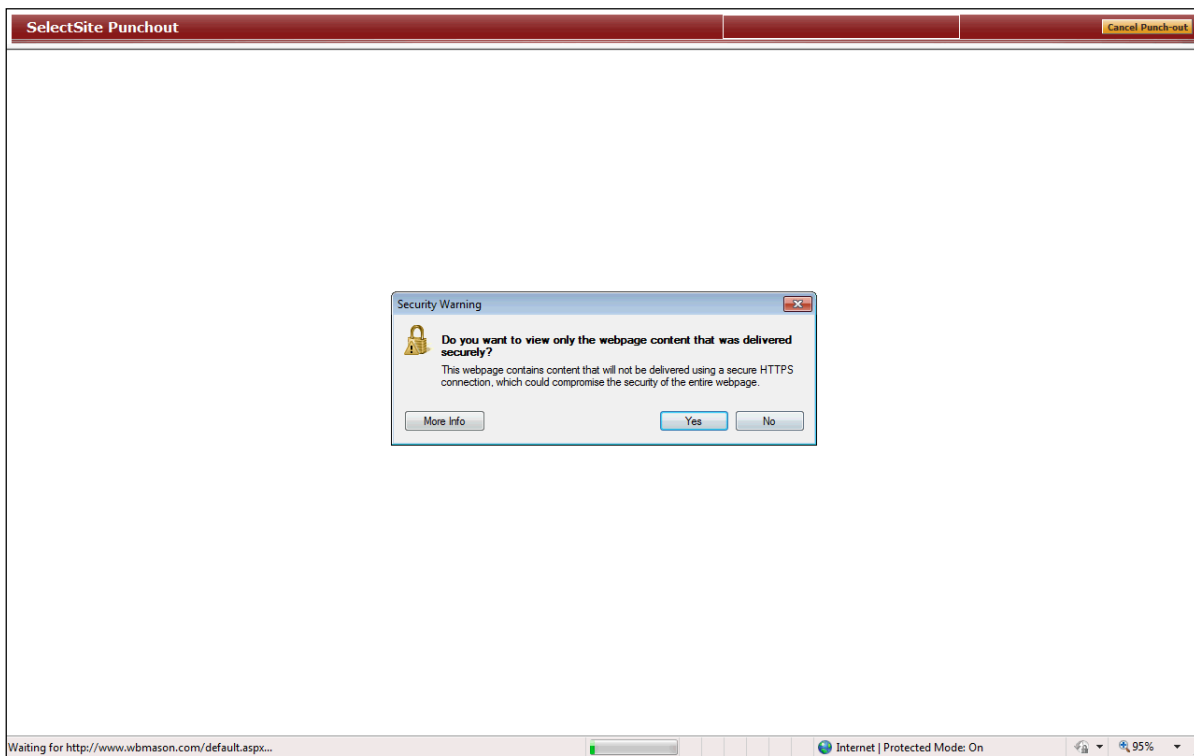
Step	Action
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15. You have practiced two (2) ways to change the Commodity Code.
- The next step is to increase the number of laptops on the line item to 2 laptops.
- The ability to edit Punch-Out items is based on the supplier's capabilities.
- If the options **MODIFY ITEMS** | **VIEW ITEMS** are shown above the Product Description, you will be re-directed to the vendor's Punch-Out site to view and/or edit the Shopping Cart items.
- *If the **MODIFY ITEMS** | **VIEW ITEMS** options are not available, you will need to **Remove** the line items from the Requisition and return to the vendor's site to start over.
- *This tutorial will not cover this topic.

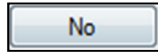


16. To edit the quantity of items ordered, click the **MODIFY ITEMS** link.
- MODIFY ITEMS**

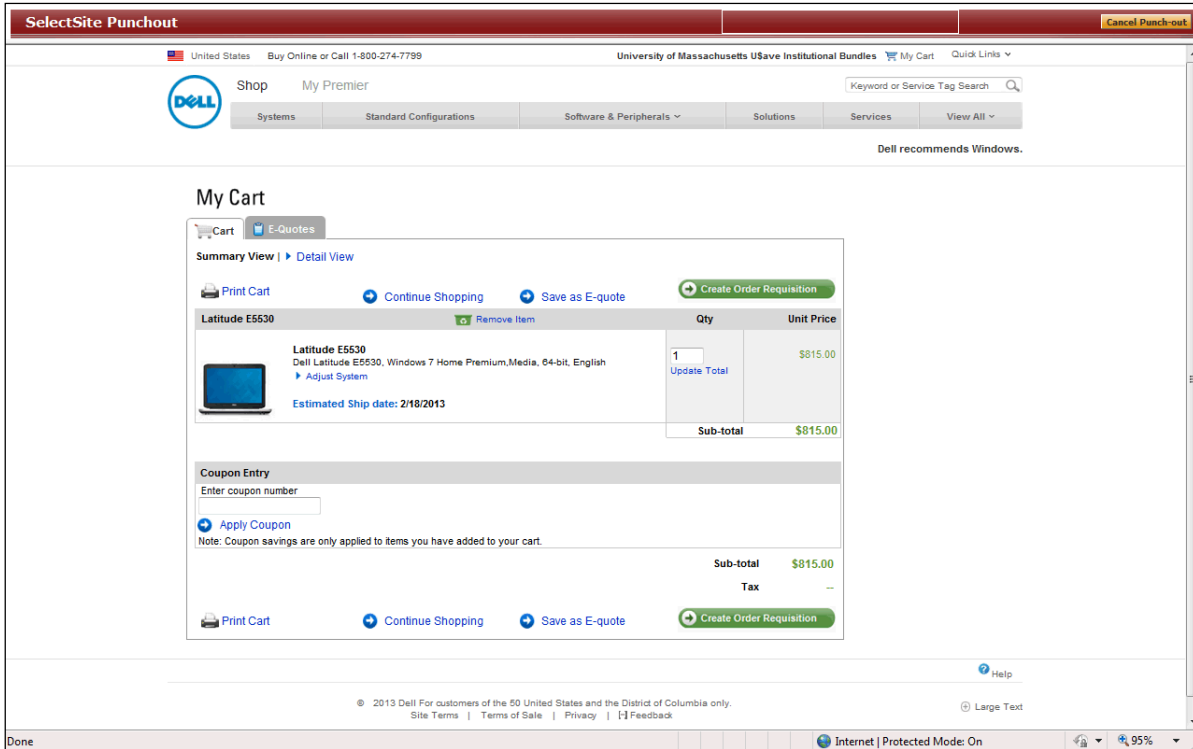
Step	Action
17.	<p>When you choose the MODIFY ITEMS or VIEW ITEMS option, you are automatically directed back to your original Shopping Cart at the supplier's Punch-Out catalog.</p> <p>Just before the Punch-Out catalog opens, a Security Warning screen appears asking the question,</p> <p>"Do you want to view only the webpage content that was delivered securely? Yes or No?"</p> <p>Your response should be "No".</p> <p>The DELL MARKETING Punch-Out catalog opens to the original Shopping Cart where changes to the purchased items can be made based on the supplier's capabilities.</p> <p>NOTE: DELL's editing procedure is not representative of all suppliers. MODIFY ITEMS VIEW ITEMS capability may vary with each supplier.</p>



- | Step | Action |
|------|-----------------------------|
| 18. | Click the No button. |



or Press **[Alt+N]**.



The screenshot shows the Dell My Cart page. At the top, there's a navigation bar with 'Shop My Premier' and a search bar. Below that, there's a 'My Cart' section with a 'Summary View' and 'Detail View' toggle. The cart contains one item: 'Latitude E5530' with a quantity of 1 and a unit price of \$815.00. There are buttons for 'Print Cart', 'Continue Shopping', 'Save as E-quote', and 'Create Order Requisition'. A 'Sub-total' of \$815.00 is shown. Below the cart, there's a 'Coupon Entry' section with a text input field and an 'Apply Coupon' button. At the bottom, there's a footer with copyright information and a 'Done' button in the taskbar.

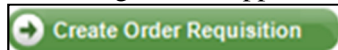
19. Change item quantity according to this supplier's capabilities.

Click the **Update Total** link.



20. Enter the desired information into the **Quantity** field. Enter "2".

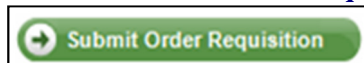
21. According to this supplier's capabilities, click the **Create Order Requisition** button.



22. Click the **Continue** button.

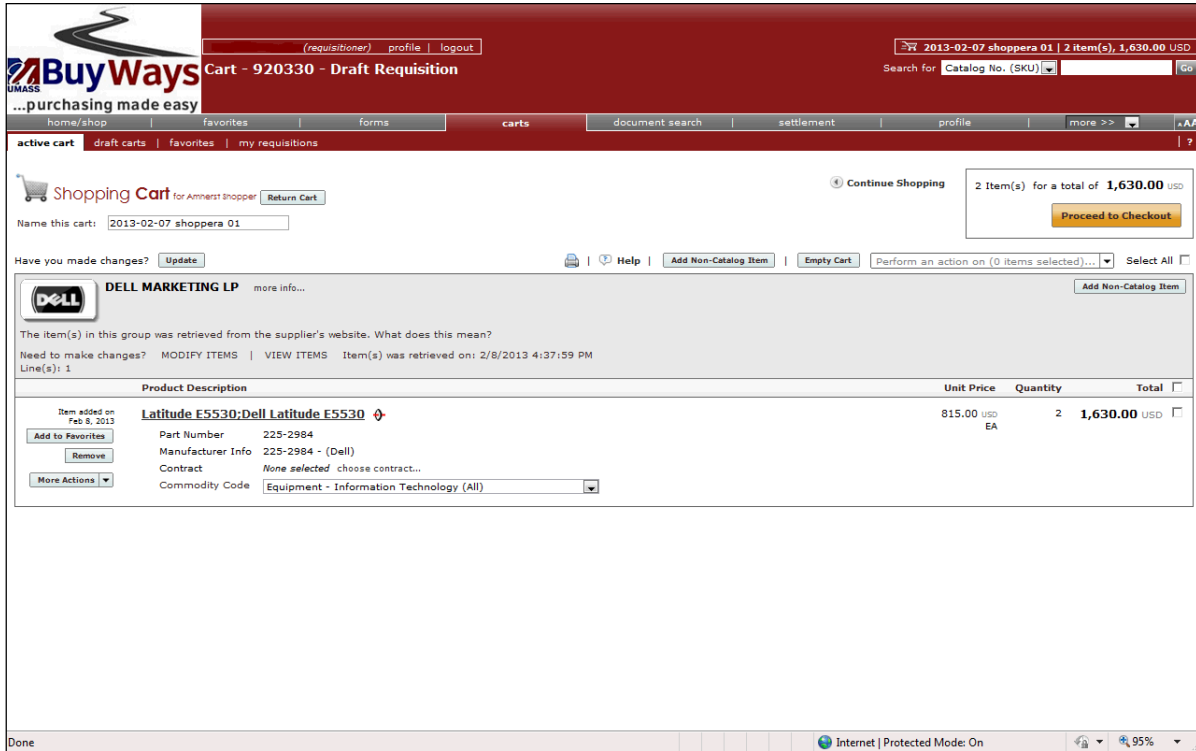


23. Click the **Submit Order Requisition** button.



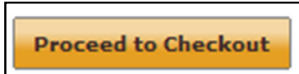
Step	Action
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24. Before proceeding to checkout, click the **Update** button.

The screenshot shows the BuyWays shopping cart interface. At the top, it displays the user's profile information, including the requisitioner's name and a search bar. The cart contains two items, with a total value of 1,630.00 USD. A prominent yellow button labeled "Proceed to Checkout" is visible in the top right corner of the cart area. Below the cart items, there are options to "Add Non-Catalog Item" and "Empty Cart". The main content area shows a detailed view of a Dell Latitude E5530 laptop, including its part number (225-2984) and manufacturer information. A table below the item details shows the unit price (815.00 USD) and quantity (2), resulting in a total of 1,630.00 USD. The interface also includes navigation links like "Home/Shop", "Favorites", and "Forms".

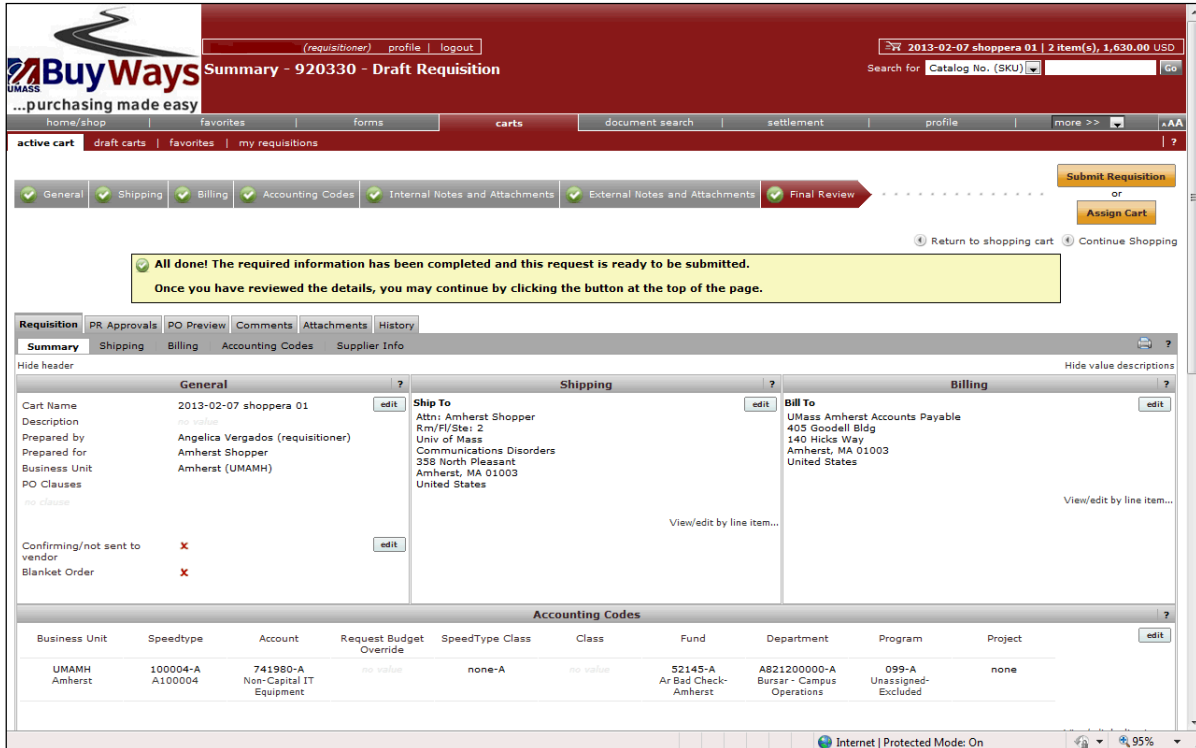
25. Click the **Proceed to Checkout** button.



Step	Action
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26. Green checks on this Requisition workflow indicate that the Requisition is complete and the next step is a Final Review.

The Final Review provides a summary of the complete request before submittal. You can also resolve many Shopping Cart issues from the Final Review step.

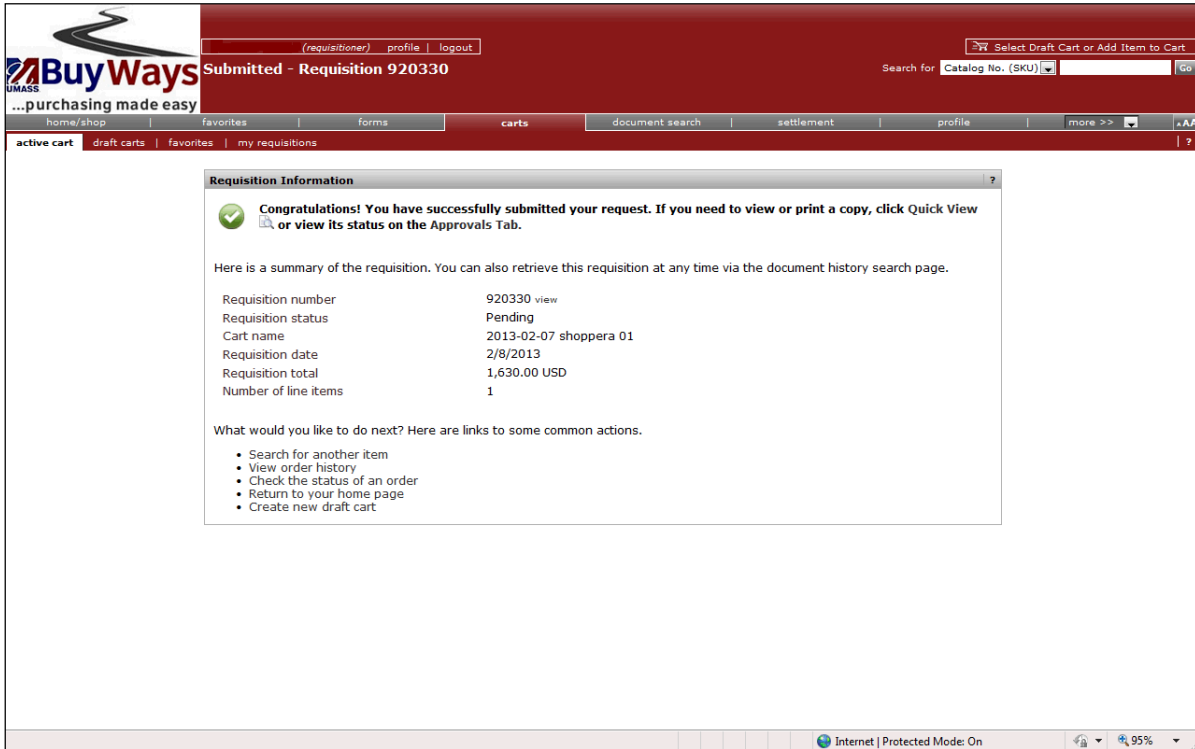


The screenshot shows the 'BuyWays' requisition system interface. At the top, there's a navigation bar with 'home/shop', 'favorites', 'forms', 'carts', 'document search', 'settlement', 'profile', and 'more >>'. Below this, a status bar shows 'active cart', 'draft carts', 'favorites', and 'my requisitions'. A progress bar at the top indicates the workflow steps: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, and Final Review (highlighted with a green checkmark). A yellow message box states: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' Below the message, there are buttons for 'Submit Requisition' and 'Assign Cart'. The main content area is divided into sections: 'Requisition' (with sub-tabs for PR Approvals, PO Preview, Comments, Attachments, History), 'Summary' (with sub-tabs for Shipping, Billing, Accounting Codes, Supplier Info), and 'Accounting Codes'. The 'Summary' section is expanded to show details for 'General', 'Shipping', and 'Billing'. The 'General' section includes 'Cart Name' (2013-02-07 shoppers 01), 'Description' (no value), 'Prepared by' (Angela Vergados), 'Prepared for' (Amherst Shopper), 'Business Unit' (Amherst (UMAMH)), and 'PO Clauses' (no clauses). The 'Shipping' section includes 'Ship To' (Attn: Amherst Shopper, Rm/FI/Ste: 2, Univ of Mass, Communications Disorders, 328 North Pleasant, Amherst, MA 01003, United States). The 'Billing' section includes 'Bill To' (UMass Amherst Accounts Payable, 405 Goodell Bldg, 140 Hicks Way, Amherst, MA 01003, United States). There are also 'Confirming/not sent to vendor' and 'Blanket Order' checkboxes, both marked with a red 'X'. The 'Accounting Codes' section is a table with columns: Business Unit, Speedtype, Account, Request Budget Override, SpeedType Class, Class, Fund, Department, Program, and Project.

Business Unit	Speedtype	Account	Request Budget Override	SpeedType Class	Class	Fund	Department	Program	Project
UMAMH Amherst	100004-A A100004	741980-A Non-Capital IT Equipment	no value	none-A	no value	52145-A Ar Bad Check- Amherst	A821200000-A Bursar - Campus Operations	099-A Unassigned- Excluded	none

Step	Action
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27. Click the **Submit Requisition** link.



28. An overlay screen lets you know that the cart has been successfully submitted to the Approver.

Click the **home/shop** button.



29. Additional details regarding **Budget Information** are available in the "Assigning Budget Information and Split Funding a Requisition" topics.

30. Congratulations! You have successfully completed a Requisition.
End of Procedure.