UNIVERSITY OF GEORGIA
Finance & Administration

3.2.8 Purchase Request Preparation

Policy Statement

All University of Georgia purchase requests will be processed through UGAmart, the web based procurement system.

Reason for policy

This policy provides guidance to those involved in preparing purchase request for goods and/or services at the University of Georgia.

Procedures

All purchase requests must be submitted through UGAmart via the web application located at ugamart.uga.edu. Training for UGAmart is held once a month at Training & Development (T&D) on the Athens campus. Current class listings are posted on the T&D website.

UGAmart Roles

All UGA employees with a valid UGA MyID and an active status in UGA Payroll may log in to and shop in UGAmart. The basic and default role for all UGAmart users is the shopper role. Additional permissions and roles may be approved by the department's responsible person and requested by email to the UGAmart systems administrator. The chart below provides some examples of the tasks which different roles may perform within UGAmart:

	Receiver	Shopper	Requisitioner	Approver
Shop for items in catalog and punch-out		x	x	x
Create non-catalog items		x	x	x
Assign a shopping cart		x	x	x
Add account number and object code to requisition			x	x
Submit requisitions for approval			x	x
Create receipts	x		x	
Approve requisitions				x

Procedure Steps

Users should log in to UGAmart using a UGA MyID and password. Requisitions may be created using one of three shopping methods: catalog items, punch-out, or non-catalog.

Catalog items may be searched from the Home/Shop page. Searches may include the name of a product, catalog number, vendor name, manufacturer name, contract name, and other criteria.

Punch-out allows users to shop directly on a vendor's website. The punch-out must be accessed through the Home/Shop page of UGAmart.

Non-catalog items should be used when a good or service to be purchased is neither a catalog nor a punch-out item. Non-catalog line items can be created on the Home/Shop page by selecting "non-catalog item" under the search bar.

Users should ensure their recommended vendor is in the system when adding a non-catalog item. (See FAQs for instructions) If the recommended vendor is not found in UGAmart, the vendor must complete the UGA Vendor Profile Form. Users should ensure the vendor has selected "Yes" on the form for the question "Do you or your company accept purchase orders?" If the company does not accept purchase orders, the company cannot be added to UGAmart.

After adding items to the shopping cart, the user should select the Proceed to Final Review button to enter and confirm information as listed in the sections on the top of the page:

General Section

Cart Name: the default cart name will be the initiation date of the cart followed by the UGA MyID used to create the cart. Users may change the cart name to something more specific if desired, i.e., Dr. Smith's Lab Supplies.

Priority: allows users to change the priority level of the requisition. There are two options: Normal and Urgent. Requisitions marked Urgent should also have emergency justification attached.

Requested Delivery: user should input a date of requested delivery.

Shipping Section

Ship To: user should enter the ship-to address where items should be delivered. For most goods, Mail and Receiving Services is the appropriate ship-to, although users may click the "select from org addresses" link to search for additional ship-tos. Users may set up default ship-tos in their personal profile by clicking their name at the top of the page, then View My Profile. In the profile menu, select Default User Settings and then Default Addresses.

Billing Section

Bill To: the billing address defaults to the Accounts Payable Department; this field cannot be edited.

Billing Options: the accounting date defaults to the date the requisition was submitted for approval. When initiating a purchase request to be issued in a future fiscal year, the accounting date must be changed to the start date of that fiscal year. If using current year's funds, allow the date to remain the "default date" which is the date the requisition was submitted for approval. If next year's funds will be used, change the date to 07/01/XXXX (XXXX = the year beginning the next fiscal year)

For example, a shopper initiates a purchase request on 04/10/2012 for an annual service agreement renewal. The service agreement will be paid using next fiscal year's funds. The shopper must change the accounting date to 07/01/2012 to indicate that the purchase will be using next fiscal year's funds.

Accounting Codes Section

Account: user should enter the account number to be used to pay for the purchase. Any alpha characters entered here must be **CAPITAL LETTERS**. Requisitioners and approvers have the ability to search through all account numbers on campus. NOTE: Shoppers do not have the ability to search or enter account numbers.

Up to 26 account codes may be entered if the purchase must be split between different accounts and/or departments. Users may split a purchase by a percentage at both the header and line item levels. Splits by dollar amount can be done at the line level only.

Users may set up default account numbers in the personal profile by clicking their name at the top of the page, then View My Profile. In the profile menu, select Default User Settings, then Custom Field and Accounting Code Defaults, then the Codes tab.

Detail Object: user should enter the 5-digit object code to be used for the purchase. Requisitioners and approvers have the ability to search through all object codes. NOTE: Shoppers do not have the ability to search or enter detail object codes.

Internal Notes and Attachments Section

Internal Note: user should add a note viewable to internal "UGA" personnel by clicking the "edit" button. Only UGA personnel with access to the requisition in UGAmart will have the ability to view any message here. To determine access ability see FAQs.

Internal Attachments: user should add an attachment for internal "UGA" personnel by clicking the "add attachment" link. Important documentation such as sole source/sole brand form, quotation, emergency letter, etc. may be attached here. Only UGA personnel with access to the requisition in UGAmart will have the ability to view any attachment here.

External Notes and Attachments Section

External Note: user should add a note to external viewers. This field is viewable by UGA personnel who have access to the requisition in UGAmart, as well as the selected vendor. Any note in this field will be viewable by the vendor once the purchase order has been issued. External notes print onto the UGA purchase order.

External Attachments: user should add an attachment for external personnel. This field is viewable by UGA personnel who have access to the requisition in UGAmart, as well as the selected vendor. Any attachment here will be sent to the vendor upon issuance of the purchase order.

Final Review

This final step in the sections at the top of the draft requisition allows users to view all of the above sections combined into one requisition. At this final step, users should carefully review all information for accuracy.

After the requisition is reviewed, a shopper must assign the cart to a requisitioner. The user should search for a cart assignee, or set up defaults in the personal profile section. Users may set up default cart assignees in the personal profile by clicking their name at the top of the page, then View My Profile. In the profile menu, select Default User Settings and then Cart Assignees.

After the requisition is at the requisitioner level, the requisitioner should add the appropriate accounting information, review the entire requisition for accuracy, and then select the Submit for Approval button. This sends the requisition to an account budget check, then to the departmental approvers set up for the department number used in the account number on the requisition. The requisition will follow an approval workflow based on the requisition dollar amount, contract status, and other approvals as applicable (if a grant account is used, the requisition must also be approved by Sponsored Programs Post Award Accounting, for example).

When a purchase request is received by the University Procurement Office, it is promptly routed to one of the University buyers. Hereafter, the processing is controlled by the buyer to whom the requisition was assigned. Responsibility of purchase requests are assigned based on the commodity and the complexity of the procurement. UGAmart allows users to search for a requisition number and identify the buyer that has been assigned to the purchase request by looking in the General section of the request.

Responsibilities

Responsible University Senior Administrator: Vice President for Finance & Administration

Responsible University Administrator: Procurement Officer
Policy Owner: Procurement
Policy Contact: Angela Varnes
Phone Number: 706-542-2361

Related information

Chart of Accounts Object Code

Date Reviewed: 02/01/2018
‹ Request of Quote (eSource) | Account Must Have Funds Prior to Travel and Expenditure Approval ›

Policy Dates

Effective Date: 01/01/2016

Date Last Updated: 06/13/2017

Date of Last Review: 02/01/2018

Date of Approval:

Previous Version of Policy: