## Buying & Paying Guide

### Audience | Type of Purchase/Payment | Buying/Paying Method
---|---|---
| | | Safe | Concur | Prime Financials | Marketplace
| | | Funding Request | Travel and Expense Card | Departmental Purchasing Card | Non-PO Payment Request | Requisition | Shopping Cart
---|---|---|---|---|---|---|---
Employee | Moving and relocation expenses | | | | | ||
Employee | Individual business expenses (e.g. travel, business meals, subscriptions, books) | | | | ||
Student | Reimbursable expenses (non-scholarship) | | | | | ||
Student | Undergraduate scholarship | | | | ||
Student | One-time graduate fellowship | | | | ||
Student | Prizes/awards | | | | ||
Guest | Honoraria | | | | ||
Guest | Travel and reimbursable expenses | | | ||
Supplier | Entertainers | | | | ||
Supplier | Supplies (e.g. office, lab, etc.) | | | | ||
Supplier | Catering | | | | ||
Supplier | Computing equipment | | | | ||
Supplier | Other goods and services | | | | ||
Supplier | Independent contractors | | | | ||
Supplier | Limited engagements | | | | ||
Supplier | Government and institutional payments (permits, taxes, utilities, etc.) | | | | ||

### Buying & Paying Process

#### Cart
- **Shopping**
  - New Marketplace
  - Hosted and punchout catalog shopping
  - Contract and non-catalog items
  - Convey comments

#### Requisition
- **Requisition**
  - Requisition and Marketplace connected
  - Include attachments
  - Requisition lifecycle
  - Allocate ChartFields across departments

#### Requisition Approval
- **Approval(s)**
  - Standard Department and dollar level workflow
  - Conditional EHS workflow

#### Purchase Order
- **Purchasing**
  - Review and approve requisitions

- **Purchase Order**
  - Direct PO capability replaced with requisition
  - PDs dispatched hourly to suppliers

#### Receiving
- **Receipt**
  - Verify services
  - Confirm goods
  - Attach packing slips

#### Invoice Entry
- **Invoice**
  - PO invoice always entered by AP
  - Non-PO payment request entered by campus
  - Electronic invoices

#### Matching
- **3-way Match**
  - Receiving required at $2,500 or more.
  - Exception tolerance 10% or $100, whichever is less

#### Invoice Approval
- **Approval**
  - Non-PO invoice approval based on standard Department and dollar levels
  - Simplified review of foreign payments

#### Payment
- **Payment**
  - Emphasis on electronic payments instead of check
  - Payments scheduled and made based on agreed supplier terms