

Purchasing Intake Portal FAQ

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Category Management

1. I have always had a "go-to" person within Purchasing to support my department's needs. Can I continue to work directly with them?

Your "go-to" person and all members of the purchasing team are available to assist you. A critical step in getting work started is to submit a formal request through the Purchasing Intake Portal. Your request will be assigned to a subject matter expert in the area that you require support in.

2. Will the Procurement Team publish the Category Management List, Assignments, and Contact Information?

Our goal is to remove any burden for departments by reviewing each request and connecting the right subject matter expert within procurement with the department. The portal streamlines and simplifies the process of connecting with the Procurement Team.

Purchasing Intake Portal Process and Tool Questions

3. How do I access the portal? Are any special role assignments required?

There are three ways to access the portal – All through It's Your Yale

1. Go to the [Procurement website](#) on It's Your Yale. Click the "Get Started" button on the front page.
2. Click the "[Yale Links](#)" button on the front page of "It's Your Yale." And look for "Purchasing Intake Portal."
3. [Bookmark this page](#) to open the portal directly (one click).

No special role assignment is required. Anyone with a Yale NetID and password can access the portal.

4. What happens after I submit a request?

Once you click the "submit" button on the form, a confirmation page will display within the portal. Shortly after, you will receive an auto-generated confirmation email advising your case has been received and is in the queue to be reviewed and assigned to a Procurement Specialist. The email will provide you with your case number.

Within one business day, you will receive an email with the name of the purchasing specialist assigned to your case.

Within two business days of the case assignment, you will be contacted by the assigned purchasing specialist. They may reach out through the portal email (case), by phone, or they may schedule a meeting with you.

5. How long will it take for someone to reach out to me after submitting a request through the Purchasing Intake Portal?

Based on the current Service Level Agreement (SLA):

- Within one business day of submitting your request, the request will be reviewed, triaged, and assigned to the appropriate specialists within the Purchasing Department.
- Within two business days of the case assignment, you will be contacted by the purchasing specialist assigned your request.

6. Can I reach out to purchasing specialist assigned my case, or do I need to wait for them to contact me?

Once you have the name of the purchasing specialist assigned to your case, you can reach out right away by replying to the case assignment notification email or by phone. You may also schedule a meeting.

Note: When you reach out by responding to the case email, all the information in your email stays attached to the case.

7. What if I have a rush request?

Always reach out to the Purchasing Team as early in the process as possible. Make a note of any rush or time-sensitive requests in the memo field of the Purchasing Intake Portal. Be sure to note the timeframe within which you require support.

8. Can multiple files be uploaded to a request? If I have more than one file to upload, can I combine them into one document?

Multiple files can be uploaded to a request; each file should not exceed 10Mb. Files should never be combined.

9. What if I encounter an issue while using the intake portal?

Any technical issues should be reported to purchasing.helpdesk@yale.edu.

Be sure to provide as much information as possible, including screenshots and what browser (e.g., Chrome, Firefox, etc.) you were using. If your request is time-sensitive, be sure to note that in your email; include the timeframe within which you need support.

10. Will my requests submitted through the Purchasing Intake Portal be closed before work is completed?

No, support requests submitted through the Intake Portal will be closed only when the work is completed.

11. What training materials are available?

The [Systems and Tools](#) page of the Procurement Website on It's Your Yale contains the Information Session Guide and a User Guide. A link to an interactive guide that simulates the Information Sessions will also be made available in the Systems and Tools section.

12. Do I have to wait until all necessary materials are compiled to submit a request through the Purchasing Intake Portal?

Departments should submit as much information as they have compiled.

If a department does not have all the required information, they can select to hold off on initiating their request, or they can submit a request and, as they gather the necessary information/documentation, respond to the case email attaching the updated information/documents.

If departments are uncertain of what documents are required, Procurement can help with identification of the specific needs.

13. What work requests should be submitted to the Purchasing Intake Portal?

Utilize the portal for the following reasons:

- Support purchasing a good/service
- Contract/Agreement discussions, reviews, signature requests
- Policy and procedure interpretation questions
- Help in completing Sole Source, ICE, Comparative Bid Forms
- Data Analysis Requests
- Issues with Suppliers
- Close a PO(s)

Policies, Procedures, and Forms

14. When do I reach out through the Purchasing Intake Portal on these topics? Do I no longer contact the Finance Support Center (FSC)?

The FSC remains an essential partner to departments when you need to:

- Identify a policy/procedure on a particular topic
- Locate the policy/procedures, or
- Locate the most up-to-date copy of a form.

Use the Purchasing Intake Portal when you have questions about:

- Policy and procedure interpretation.
- Need support in identifying which form to use
- Need support completing the ICE, Sole Source, or Comparative Bid forms

Changes to the Close PO Process

15. I am concerned about the lack of visibility that I now have over the close Purchase Order (PO) process; what are my options to ensure there has not been a mistake (wrong PO closed, PO closed inappropriately)?

Departments have visibility into both their open and closed POs through various Workday reports.

The Find Purchas Orders by Cost Center report provides comprehensive information on both open and closed POs.

It is up to the Business Office leadership's discretion to determine their internal process for closing POs (e.g., deciding when to close a PO, approval to close a PO, and who in the department is responsible for submitting the request).

16. When submitting a request to close a PO, do the PO# and Supplier fields need to be filled out?

Yes, both are required fields. If the request is to close two (2) or more POs, you must enter one PO number and the supplier in the PO# and Supplier fields. Upload an excel spreadsheet listing up to 50 POs to close; include the PO # and the name of the supplier.

Requisition Questions

17. Can I create a requisition through the portal?

No. Utilize the portal for review/signature on contracts/agreements. Once your contract/agreement is finalized (i.e., signed), you can go to Workday and begin the requisition process by using the “create requisition” task. A requisition is required to generate a Purchase Order.

Note: All approvals must be in place for a PO to be generated.

18. If a contract is signed through the portal, do I still need to create a requisition?

Yes, a requisition must be created in Workday’s “create requisition” task.

Once the requisition is approved, a Purchase Order (PO) is automatically generated and sent to the Supplier.

When creating the requisition, attach all backup documentation, including signed contracts/agreements, Statements of Work (SOW), quotes, forms such as Sole Source, ICE, Comparative Bid if applicable, etc.

19. Where do I create standing orders, Workday, or the Purchasing Intake Portal?

All standing orders are created in Workday as a requisition type 01 or 02. If you have a contract/agreement that requires review/signature, submit the contract/agreement through the Purchasing Intake Portal first. Once signed, the requisition for the standing order can be created in Workday.

20. Where do I update a Purchase Order (PO), Workday, or the Purchasing Intake Portal?

POs are updated in Workday. If you have a contract/agreement that requires review/signature, submit the contract/agreement through the Purchasing Intake Portal first. Once signed, the PO can be updated in Workday.

Changes to the Contract/Agreement Review and Signature Process

21. What has changed when I have a contract/agreement that requires review/signature?

All contracts, including agreements such as a PCSA, should now be sent through the portal for discussion/review/signature. Your portal submission should include any information that supports the contract/agreement review, such as a COI.

Once the contract/agreement is finalized (e.g., signed), the requisition can be initiated in Workday utilizing the "create requisition" task. All required backup, including the signed contract/agreement, should continue to be attached to the requisition.

22. Do I still need a certificate of insurance (COI)?

Yes, the requirements related to certificates of insurance have not changed.

Departments should continue to work with Risk Management. When they receive the COI from the supplier that they want to contract with, attach it to their Purchasing Intake Portal request. If the request has already been initiated, the department should respond to the case email and attach the COI. If you feel that a COI is not warranted, you need to obtain a signed "waiver" form from the Risk Management department and submit that.

23. Do I still need to work with OSP on sponsored award-related purchases?

Departments should first work with and obtain approval from their OSP manager for any purchases of goods or services. Then each out to Procurement through the Intake Portal to finalize the contract/agreement.

24. What will happen if an unsigned contract/agreement is attached to a requisition type 1 or 2?

Effective September 28, 2021, an unsigned (i.e., non-finalized) PCSA or contract should never be attached to a requisition.

When, during their review of a requisition, a Purchasing specialist finds an unsigned agreement, they will use the send back function in Workday to return it to the department. They will instruct the department to pursue the review/signing of any contract/agreement through the Purchasing Intake Portal and submit a requisition following finalization of the contract/agreement.

If the requisition contains a contract under the dollar threshold and, as a result, the requisition does not route to Procurement, when it arrives at the supplier, the supplier will send the PO back to us (notify us). They cannot execute against a PO if the contract/agreement is not signed.

25. Do I need to submit a zero-dollar contract through the Purchasing Intake Portal?

If the contract/agreement contains any terms and a signature is required, submit the contract through the Purchasing Intake Portal for review and signature.

26. Do quotes need to be submitted through the Purchasing Intake Portal for signature first?

Quotes are part of a larger sourcing process. If a signature is requested/required by the supplier, reach out through the portal for support.