Frequently Asked Questions (FAQ's)

Below are listed the most often asked questions regarding MagnusMart. The list is organized by topic. The topics and the questions beneath each topic are linked to the page with the answer. Click on a specific question and it will take you to the answer for that question. You may browse the Contents Directory or browse the page for questions and answers.

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Budget Checks

What happens during the budget check? Does it look at the century line?

In the initial budget check the chart fields are verified for accuracy. After approvals are granted, a secondary budget check is performed by the system where the century line is checked to see if the money needed for the purchase is there.

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Do we have a check for appropriate use of account codes as part of the account code review?

The Department Approval steps are based on the account codes - Dept /Project/Class. This means that if an account code for another department is used, the approver(s) from that department must review and authorize the purchase.

Can a shopper enter account codes?

No. They can request that the order be placed against a certain chart field by writing their request in the Notes section when they assign their cart to a Requester.

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Continuous Orders

If there are continuous orders that are in place when we go live, do they have to be re-entered into the system?

Yes, you will need to close out the old Purchase Order. Then create a new PO for the amount remaining on the old PO and mark it as a Continuous order under the General tab. Attach a copy of the original PO to the new one.

Should a continuous order be used for consultants?

Yes.

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Forms

Can a shopper complete a Non-catalog form?

Yes.

What is a Commodity Code?

Four letter codes that identify general purchasing categories. These are important tools that are used to report purchasing trends and categorize the types of purchases made by the University.

Are the commodity codes obvious?

Yes. It is recommended that you search on the description to find the correct code if you're not sure.

If you use a non-catalog vendor, is there a drop list for the commodity code?

Yes. Search on the description to find the possible commodity codes and select from the list.

If this is a brand new vendor that we have never used before which form should we use to place the order?

Use the Non-catalog form for most orders. Enter “Purchasing Dept” in the vendor name box at the top. Then add the requested new vendor information in the box. Be sure to complete all boxes where the information request is in **bold** type.

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How do we provide the vendor’s W9 to Purchasing? Do we attach it?

Do not attach the W9 form to the new order. Have the vendor email it to MagnusMart@csuohio.edu.

For speakers, how do we provide the birthday and SS numbers?

Have the vendor email the information to MagnusMart@csuohio.edu.

Which form should I use if I have speakers that come and want to give them a check when they are done?

Use the Payment Request Form. Be sure to mark the Special Payment Instructions and provide an explanation in the two boxes at the bottom of the form. This is a good place to add any notes regarding who will pick up the check. Also, have the Requester mark “Hold for pick-up” in the Payment Override area under the General tab before the cart is submitted as a Purchase Requisition.

What if I am ordering from a sole source vendor or cannot get three quotes?

Use the “Request for Waiver of Competitive Bidding” form.

If I use the “Request for Waiver of Competitive Bidding” form do I also have to complete a Non-catalog form?

No, the “Request for Waiver of Competitive Bidding” form is the only form needed.

Which form should be used when paying for auto repair?

The Payment Request form.

When completing a Payment Request form, do I need to attach the invoice to the form?

Yes, scan and attach the invoice to the form using Internal Attachments.

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Receipts and Invoices

When a service is received, can you do the receipt and invoice at the same time?

Yes, but enter the receipt first.

Is there a time frame on receipts?

No, but invoices will not be paid until a receipt is entered.

What about the case of services? Do you still need to create a receipt?

Yes. You would create a “cost” receipt rather than a “quantity” receipt.

How do I create a Cost receipt?

Open the Purchase Order, in the upper right by Available Actions, use the pull-down arrow to select “Create Cost Receipt”, then click the “Go” button. Enter the dollar value of the services received (can be the full amount or a partial) and select the “Complete” button.

Who is responsible to create the receipt?

Whoever shopped for the product(s) and created the cart is responsible to create the receipt.

If the vendor sends a partial invoice, does Accounts Payable still pay the invoice?

Yes, we pay for the partial amount received.

How would Services group handle partial receipts?

They would issue a cost receipt for the partial amount.

What happens if the vendor does not deliver the correct product but sends a substitute instead?

No substitute items are allowed for any vendor.

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Roles

Can Shoppers build their cart and give it to the requestor?

Yes, that is what shoppers do. They build their cart and assign it to the Requestor for their department so the Requester can submit it.

Is everyone with a CSU ID a shopper?

No, they must also be employed by the university in order to gain access to MagnusMart.

Does the shopper get an email that their cart has been processed by the Requester and is now in the workflow for approval?

Yes, they can receive an email or notification in MagnusMart that their cart is now a purchase requisition in the workflow. This is set up as a preference using the “Shopping, Carts, and Notifications” area under their profile.

Can a Shopper edit the original requisition?

The Shopper can edit their cart while it is still in the draft cart mode. Once the Requester has submitted it into work flow for approval they cannot make edits.

Can a Requestor also shop?

Yes, but requestors cannot approve their own orders.

What is the difference between the Shopper and Requestor roles?

Shoppers cannot submit a cart into workflow. They have to assign the cart to the requestor. Requestors can shop and submit carts into workflow. Requestors can edit the contents in their assigned carts.

If I am a Requestor, do I have to assign my cart to another Requester?

No, requestors can submit their own carts.

What if a person's role needs to change? How can this be done?

Use the Workflow Change-Add Request Form found on the MagnusMart site to make any changes to the roles within a department. The form must be completed and signed. It can then be delivered to the Purchasing department or scanned and emailed to MagnusMart@csuohio.edu. Here is a link to the MagnusMart website: http://www.csuohio.edu/purchasing/magnus-mart/

As a Requester or Approver, how will I be notified that I have actions to complete?

You will receive an email and/or a notification within Magnus Mart. You can set your preferences on your profile as to how you would like to be notified and at which points in the workflow process.

Can you add an approval to a requisition when you create it?

Workflow steps and approvers are pre-defined. However, you can assign the cart to another Requester before it is submitted into workflow. They can then submit it into workflow, or they can return it back to you, and then you can submit it into workflow.

Are the chart fields (account codes) validated to see if there is an incorrect combination?

Yes. The initial budget check is validating the combination against the chart fields in PeopleSoft to ensure it is a legitimate combination.

What happens if the secondary budget check shows that there are insufficient funds in the century line to cover the order?

The Requester and the Controller's office will get an email notification about this so it can be addressed using a budget transfer.

I see more than one Approver listed. Do they both have to approve the Purchase Requisition before it moves to the next step in the workflow?

No. More than one approver can be in an approval step but only one person needs to approve.

As an Approver, do I need to assign each purchase requisition to myself before I review it?

Yes, it is highly recommended that you assign it to yourself since it locks others from doing anything with the PR while you are working on it and it offers you more options for the PR's disposition.

If a commodity approval is required, will a box appear in the workflow?

Yes, it will appear as a step in the workflow process.

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Shopping

When you search, what is it searching against?

It searches against the Hosted suppliers. It **does not** search against the Punch-out suppliers' catalogs.

Does it automatically give you the best price?

It gives the prices, but it allows you to compare prices. Within the vendor site you can filter the prices from lowest to highest or highest to lowest.

Do you have to know the part number to search?

No, but the more words you input, the better the search results will be.

Are these hosted suppliers, items, and prices pre-approved?

Yes, these are CSU contracted catalogs and prices.

Shipping address - is there a default?

The ship-to addresses can be defaulted on your profile, or you can select from the list.

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