

To: All SciQuest users
From: Yale University Procurement
Re: Initiator soon required for all SciQuest requisitions

Currently, when creating a SciQuest requisition, users have the option to identify the Initiator of the transaction to indicate who is requesting the purchase. Starting in *March of 2008*, the Initiator will be **required for all SciQuest requisitions** and most other purchasing transactions.

To prepare you for the transition, **beginning Tuesday, February 12th, a new reminder message will appear in your SciQuest shopping cart if the name of the Initiator is blank.** Although the order will not be stopped during this transition period, we encourage you to begin using the Initiator routinely in the coming weeks.

Who is the Initiator?

Last summer, in order to improve compliance and reporting across our purchasing transactions, Procurement was advised of the need to capture three distinct participants for most Procurement transactions: Initiator, Preparer, and Approver.

- The transaction **Initiator** is the person who requested that the goods or services be ordered and who determines that the costs are reasonable, allowable and allocable to the source of funds. This role can be delegated by the Principal Investigator (PI).
- The **Preparer** is the person who places the order, on direction from the Initiator. **The Preparer can also be the Initiator.**
- The **Approver** is an administrator, business manager or duly authorized designee of a department, unit or business support center; having budgetary responsibility for the transaction involved.

Maintaining Initiator Lists in Your SciQuest Profile

For ease of ordering, you can maintain a list of Initiators in your SciQuest profile. This will permit you to use a pull-down list rather than searching for the Initiator on each order.

Click [here](#) for instructions on how to maintain Initiator data in your profile and specify Initiators on your order.

Click [here](#) to see what the new reminder message will look like.

As invoices are matched to Purchase Orders, the Initiator from the PO line will be copied to the invoice line. This is now visible in Procurement Inquiry and will become visible on financial reports in the future.

If you have questions, please contact the Help Desk at 432-9000.