

E-Procurement System Tutorial

Non-Catalog

E-Procurement is an online system which allows the user to purchase products/services from vendors.

Creating a Purchase Order – Non-Catalog Form

This form is used to purchase items that are not available in our catalog or punch-out shopping areas. It is used for general purchases, service contracts, print orders and more.

- Click the **Shopping cart** then click **Non – Catalog form**

The screenshot shows the PACE University e-Procurement Marketplace interface. The top navigation bar includes the PACE University logo, the text "e-Procurement Marketplace", and user information: "John Test", "Action Items", "Notifications", and "0.00 USD". A "Shop" menu is open on the left, with a shopping cart icon highlighted in a red box. The menu options include "Shopping", "My Carts and Orders", "Dashboard", "Go To", and "Browse By". The "Go To" section has a "Non-Catalog Form" link highlighted in a red box. The main content area features a search bar, a "Browse" section with "suppliers | categories | chemicals", and a "Vendor Management System" button. Below this, there are sections for "Showcase Services" and "Showcase Suppliers". The "Showcase Services" section includes links for "Chartwells Dining Services", "Florist Order Form - New York", "Daniels Sharpsmart Form", "Non-Catalog Form", "RFQ Request Form", and "Sole Source Form". The "Showcase Suppliers" section includes links for "Crystal Rock New York City", "Crystal Rock Westchester", "Enterprise Car Rental", "Staples Cartridge Recycling", and "TRAVEL GUARD".

Filling out the Non-Catalog form

Non-Catalog Form Available Actions: Add and go to Cart

Supplier Info

Enter Supplier

or
supplier search

General Info

Non-Configurable Fields

Request Type Non-Catalog Form

Item Name/No.

Item Description

254 characters remaining

Quantity

Packaging (UOM) EA - Each

Estimated Price

Capital Expense

Configurable Fields

Product Size

Manufacturer Name

Manufacturer Part Number

UNSPSC

Health and Safety

Controlled substance

Recycled

Hazardous material

Radioactive

Rad Minor

Select Agent

Toxin

Energy Star

Green

Bid Number (if applicable)

Notes

1000 characters remaining

External Info

Contract Start Date

mm/dd/yyyy

Contract End Date

mm/dd/yyyy

Contract? Please select...

Contract ID

External Attachments

Total 0.00

Supplier info

Click **Supplier Search** to search for a supplier

General info

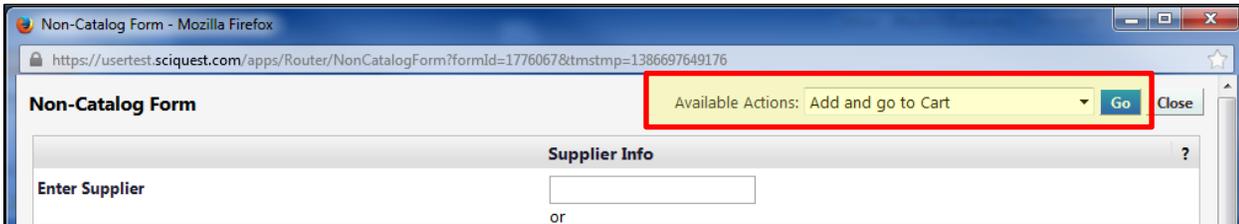
- Enter Item name/Number
- Enter Item description
- Enter quantity
- If applicable, adjust Packaging (UOM).
- Enter Estimated Price
- If applicable, check-off Capital Expense
- If applicable, fill in the Configurable fields (Product Size through Bid Number)
- Enter any notes pertaining to the order.

External info

If your order pertains to a contract enter in contract details.

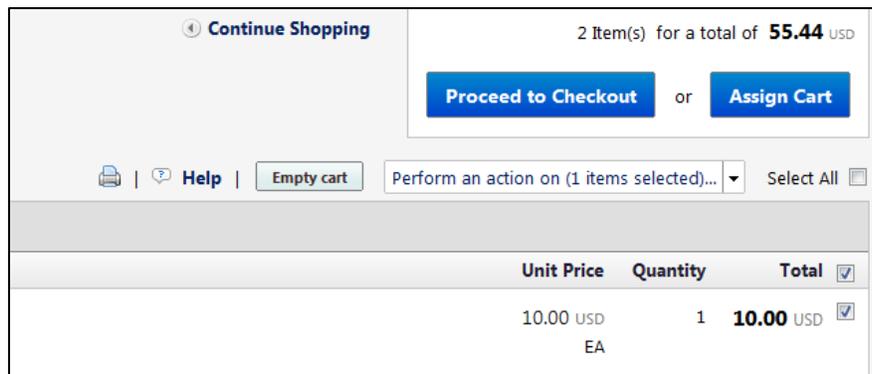
Note – The **Contract?** Field is required, select **Yes** or **No**. This denotes whether the non-catalog form relates to a contract or not.

- In **Available Actions**, select **Add and Go To Cart**, then click **Go**.



- ✓ If there are additional items that need to be added to the cart, then click **shopping cart** on the left of the screen. Multiple items can be added from as many vendors as desired to the cart. This can be done for hosted and punch-out vendors as well.
- ✓ If there are items you want to remove from your cart, select the items to be removed by clicking the select box located to the far right of the line item. Click the drop-down menu that reads **Perform and action on**. Click **Remove Selected Items**. Click **Go**.

Note: unwanted items are deleted.



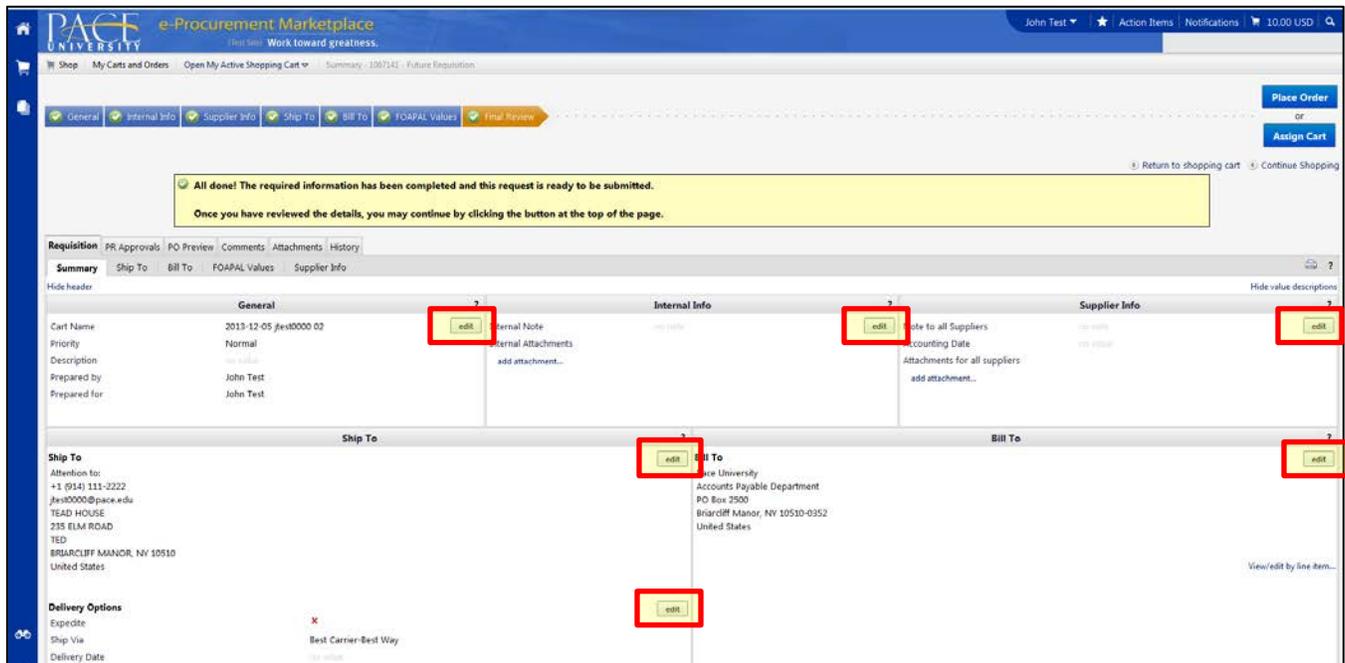
- Once all desired items are in your cart, click **Proceed to Checkout**.

Final Review

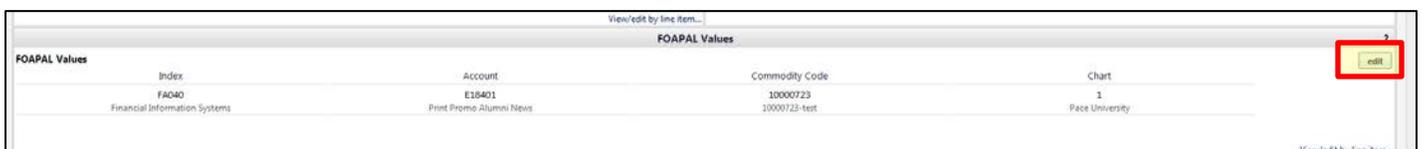
Verify all the information (Ship To, Bill To, FOAPAL Values etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the entire document, or each line item individually.



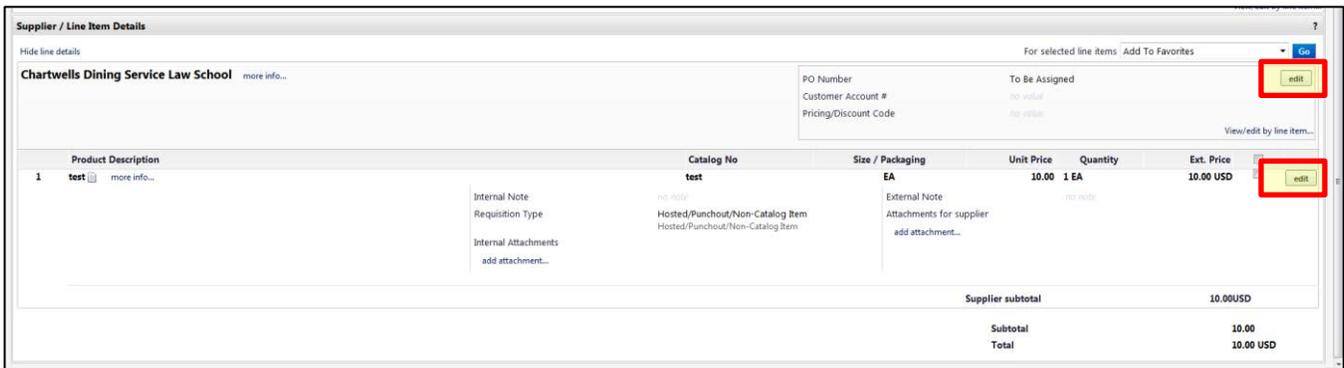
- To adjust the **Summary** information, click **Edit** (located in the upper right of the corresponding box) for the particular section which needs adjusting. After changes have been made, click **Save**.



- To adjust any **FOAPAL Value** information, click **Edit** (located in the upper right of the corresponding box) to modify any values listed. After changes have been made, click **Save**.



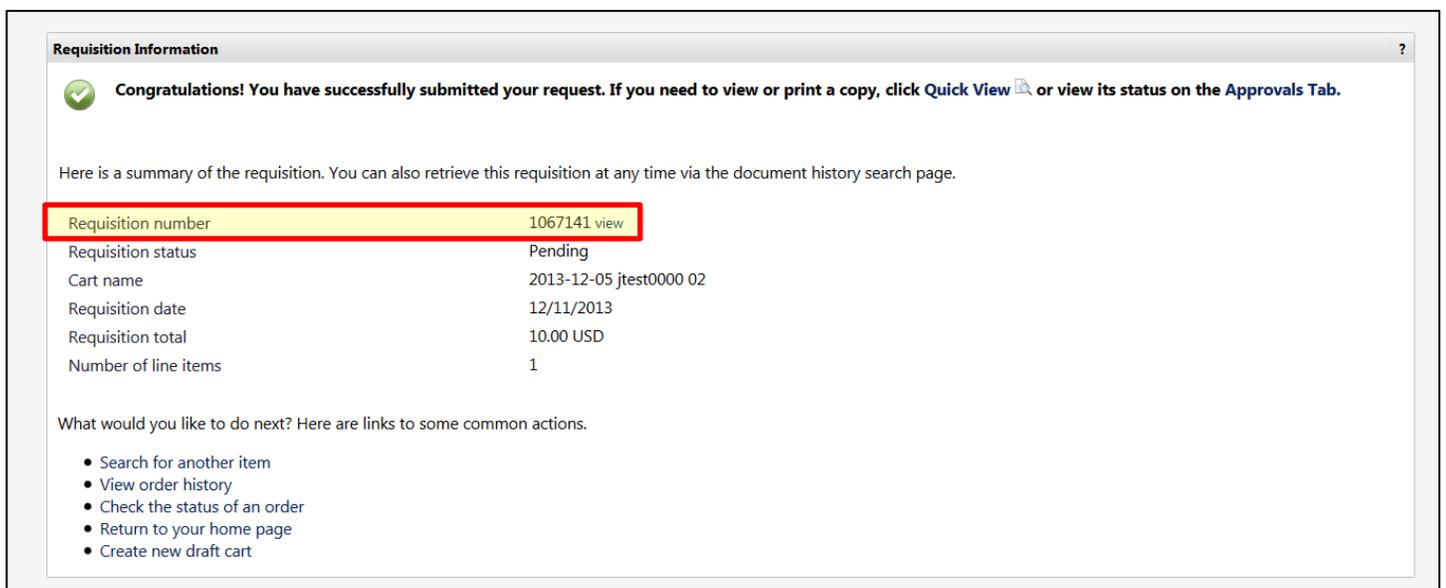
- To adjust **Supplier/Line Item Details**, click **Edit** (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save**.



- Once all edits have been completed, click **Place Order**.



*The user will receive a **requisition number** and a confirming email.



Viewing the Requisition status:

- Click the **requisition number** to view the status of the order placed.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	1067141 view
Requisition status	Pending
Cart name	2013-12-05 jtest0000 02
Requisition date	12/11/2013
Requisition total	10.00 USD
Number of line items	1

- Click the **PR Approvals** tab to view the status of your requisition.

The screenshot shows the 'PR Approvals' tab selected. The workflow consists of the following steps:

- Submitted: Dave Taylor, 12/6/2013 5:17 PM
- Banner Budget Check: Completed ✓ System
- Capital Approval: Approved ✓ Dave Taylor
- Create PO: Completed ✓
- Completed: 12/6/2013 5:18 PM

- Click the **History** tab to view details of the requisition workflow.

The screenshot shows the 'History' tab selected, displaying a table of 9 records:

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/6/2013 5:18 PM	System		Requisition approval process completed				
	12/6/2013 5:18 PM	System	Create PO	PO Created	PO#: 16612005			
	12/6/2013 5:18 PM	Dave Taylor	Capital Approval	Requisition approved				
	12/6/2013 5:18 PM	Dave Taylor	Capital Approval	Requisition assigned				
	12/6/2013 5:17 PM	System	Banner Budget Check	Requisition approved				
	12/6/2013 5:17 PM	Dave Taylor		Requisition submitted				
	12/6/2013 5:17 PM	Dave Taylor		Line removed	458110			
Line 1	12/6/2013 5:16 PM	Dave Taylor		New Line added	458110	Punch-out		
	12/6/2013 5:15 PM	Dave Taylor		Requisition Copied		Requisition 1067806		

➤ Click the **Requisition** tab and scroll to the bottom right to retrieve the Purchase Order number.

Pace University e-Procurement Marketplace
Work toward greatness.

Expediting Options: Expedite (x), Ship Via: Best Carrier-Best Way, Delivery Date: (no value)

View/edit by line item...

FOAPAL Values			
Index	Account	Commodity Code	Chart
FAQ40 Financial Information Systems (FIS)	E31801 Cap Bud Future Floor Covering	150 Builder'S Supplies	1 Pace University

View/edit by line item...

Supplier / Line Item Details

Hide line details

For selected line items: Add To Favorites

Staples more info...

PO Number	PO128653
Customer Account #	(no value)
Pricing/Discount Code	(no value)

View/edit by line item...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ✓ Ziploc Double Zipper Bags, 1 Gallon, 1 3/4 mil., Clear, 11 H x 10 1/2 W, 250/Ct (no value)	458110	CT	45.44	1 CT	45.44 USD

Manufacturer Name: Diversey, Inc. Internal Note: (no value)
Manufacturer Part Number: 94602 Requisition Type: Hosted/Punchout/Non-Catalog Item
Supplier Part Auxiliary ID: (no value) Internal Attachments: (no value)

Supplier Attn To: (no value)
External Note: (no value)
Attachments for supplier: (no value)

Supplier subtotal: 45.44USD
Subtotal: 45.44
Total: 45.44 USD