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



Filling out the Non-Catalog form

https://usertest.sciquest.com/apps/Kouter/NonCatalogForm	n?formId=1776067&ttmstmp=1386697649176	
Non-Catalog Form	Available Actions: Add and go to Cart	Go Close
	Supplier Info	Supplier info
Enter Supplier		Supplier Into
	Or supplier search	
		Click Supplier Search to
	General Info	search for a supplier
Non-Configurable Fields		
Request Type	Non-Catalog Form	
Item Name/No.		Conoralinfo
		General III0
	254 characters remaining expand clear	• Enter Item
Quantity		name/Number
Packaging (UOM)	EA - Each	Enter Item description
Estimated Price		• Enter quantity
Canital Evnance		• If applicable, adjust
Configurable Fields		Packaging (UOM)
		Enter Estimated Price
Manufacturer Name		Enter Estimated Price
Manufacturer Part Number		• If applicable, check-off
		Capital Expense
Health and Safety	Controlled substance	• If applicable, fill in the
	Recycled	Configurable fields
	🔲 🔶 Hazardous material	(Product Size through
	Radioactive	Rid Number)
	🗐 💩 Select Agent	• Enter any notes
	🔲 🛠 Toxin	• Effect any flotes
	Green	pertaining to the order.
Bid Number (if applicable)		
Notes		
		External info
		If your order pertains to a
		contract enter in contract
	1000 characters remaining expand clear	details
	External Info	details.
Contract Start Date		*Nota* The Contract? Field
	mm/dd/yyyy	is noted as her Variable N
Contract End Date		is required, select Yes or No .
Contract?	mm/dd/yyyy	This denotes whether the non-
	Please select V	catalog form relates to a
Contract ID		contract or not.
External Attachments		
add attachment		

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

Non-Catalog Form - Mozilla Firefox		the second second			x
https://usertest.sciquest.com/apps/Router/NonCatalogForm?formId=17760	/67&tmstmp=13	86697649176			☆
Non-Catalog Form		Available Actions: Add and go to Cart	Go	Close	-
	Supplier Inf	o		?	
Enter Supplier					
	or				

- ✓ 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.

	i(s) ior a to	tal of 55.44 use
Checko	ut or	Assign Cart
n (1 item	s selected)	▼ Select All
t Price	Quantity	Total 👿
00 USD	1	10.00 USD
	00 USD	00 USD 1

> 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.

PACE •	Procurement Marketplace			Joh	n Test 🔻 🔺 Action Items Not	fications 🗮 10.00 USD 🔍
ÜNIVERSITY	DeitSus Work toward greatness.					
Shop My Carts and Orders	Open My Active Shopping Cart Summary - 100/141 - Future	re Requisition				
						Place Order
🖉 General 🥝 Internal bits	a 🔗 Supposed and 🔗 Shari Ta 🔗 Bill To 🔗 TO APA	Values 2 final Review				or
						Assign Cart
					Return to shop	ping cart 🕐 Continue Shoppie
	All done! The required information has been complete the second secon	pleted and this request is ready to be	submitted.			
	Once you have reviewed the details you may co	stinue by clicking the button at the top	of the page			
	once you mare rearen and actume, you may con	tanke by calcung the button at the top	of the page.			
Requisition PR Approvals P	O Preview Comments Attachments History					
Summary Ship To Bi	ill To FOAPAL Values Supplier Info					a :
Hide header						Hide value description
	General		Internal Info		Supplier Info	
Cart Name	2013-12-05 #est0000 02	edit. I ternal Note		edit. tote to all Suppliers		edit
Priority	Normal	ternal Attachments		Accounting Date		Assertantelle
Description		add attachment		Attachments for all suppliers		
Prepared by	John Test			add attachment		
Prepared for	John Test					
	Chin To			Dill Ta		
Shin To	sub to		THE REAL PROPERTY OF	514 10		1.00
Attention to:			ear ce University			eşit
+1 (914) 111-2222			Accounts Payable Department			
jtest0000@pace.edu			PO Box 2500 Principal Manage AV 10510-0252			
235 ELM ROAD			United States			
TED						
United States	3 y					View/edit by line item
Expedite	×		edit			
Ship Via	Best Carrier-Best Way					
Defense Date	and source best way					

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.

	View/ec	it by line item		
		FOAPAL Values		
FOAPAL Values	Account	Commodity Code	Chart	edit
FA040 Financial Information Systems	E18401 Print Promo Alumni News	10000723 10000723-test	1 Pace University	
				View/edit by line item

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.

Supplier / Line Item Details								?
Hide line details					For selec	ted line items Add T	o Favorites	• Go
Chartwells Dining Service Law School more info			PO Number Customer Account # Pricing/Discount Co	de	To Be Assig no value	ned	View/r	edit
Product Description		Catalog No	Size / P	ackaging	Unit Price	Quantity	Ext. Price	17
1 test	Internal Note Requisition Type Internal Attachments add attachment	test Not edity Hosted/Punchout/Non-Catalog Iter Hosted/Punchout/Non-Catalog Item	m	A External Note Attachments for supp add attachment	10.00	1 EA	10.00 USD	edit
				Si	upplier subtotal		10.00USC)
					Subtotal Total		10.0	io Io USD

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

ñ	PACE .	Procurement Marketplace Treases: Work toward greatness.		John Test 🔻	🛉 📩 Action Items	Notifications	🗎 10.00 USD 🔍 🔍
1	W Shop My Carts and Orders	Open My Active Shopping Cart Summary = 1057141 + Future Requisition					
							Place Order
6.79	🥣 General 🥣 Internal Infö	Supplier and Ship To S					Assign Cart
					🛞 Return t	o shopping cart	Continue Shopping
		All done! The required information has been completed and this request is r	eady to be submitted.				
		Once you have reviewed the details, you may continue by clicking the butto	n at the top of the page.				

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

Congratulations! You have successfu	ılly submitted your request. If you need to view or print a copy, click Quick View 🗟 or view its stat	tus on the Approvals Tab.
ere 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	
/hat would you like to do next? Here are links	to some common actions.	
 Search for another item 		
 View order history 		
 Check the status of an order 		

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.

	e-Procurement (Marketplace				Dave Taylor 🔻	🖈 Action Items 🔝 Notifications 🚮 🌹 (0.00 USD 🛛 🔍
UNIVERSITY	(Ten-Site) Wo	rk toward greatness.						
📄 🧌 Orders & Documents	Document Search Search Docur	nents 🗢 Approvals - Requisition	1067790					
• Return to Search Re	ults				4 of 2177 results 🔺		Requisition Number(s)	1067790 -
Requisitio PR Approva	Is Comments Attachments Hi	story					Available Actions: Add Comment	- Go
								2 ?
Orientation: Horizontal								
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.

UNIVER	5179	(Ben Bill) V	Vork toward greatne	ss.								
Crders & Doo	cuments Docum	ent Search Search Do	cuments 🗢 History I	Regulation 1067790								
• Return to	Search Results					(d) 4 of 2177 results (b)				Req	uisition Number(s)	1067790 •
Requisition Pl	R Approvals Com	iments Attachments	History							Available Action	ns: Add Comment	▪ Go
① Click to	filter history				7							Export CSV
Results per p	page 20 -					Records found: 9					+ Page 1	of 1 ?
Line No	- Date/Time -	User	4	Step(s)		Action		Field Name	4	From	То	Note
	12/6/2013 5:18 PM	System			Requisition approval process	completed						
	12/6/2013 5:18 PM	System	Create PO		PO Created		PO#: 1	6612005				
	12/6/2013 5:18 PM	Dave Taylor	Capital_Appro	val	Requisition approved							
	12/6/2013 5:18 PM	Dave Taylor	Capital_Appro	val	Requisition assigned							
	12/6/2013 5:17 PM	System	Banner Budget	t Check	Requisition approved							
	12/6/2013 5:17 PM	Dave Taylor			Requisition submitted							
	12/6/2013 5:17 PM	Dave Taylor			Line removed		458110	0				
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 1	067806		
Results ner n	name 20 ·										# Pa	ge 1 of 1

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

~	DACE e	-Procurement Marketplace	-				Dave Taylor 🔻	🖈 Actio	n Items 1.203 Notificatio	ns 📶 🗎 0.1	00 USD
"		Timilitiit Work toward greatness.									
	Expedite	×									
	Ship Via	Best Carrie	r-Best Way								
6	Delivery Date										
				View/edit by	line item						
<u>h.</u>					OAPAL Values						2
6 3	FOAPAL Values	Index		Account	c	ommodity Code			Chart		
		FA040		E31801		150			1		
3	Financi	al Information Systems (FIS)		Cap Bud Foture Floor Covering		luilder'S Supplies			Pace University		
										View/edit	t by line iten
	Supplier / Line Item Detai	ls									8
	Hide line details						F	or selected li	ne items Add To Favorites		▼ Go
	Staples more info					PO Number		P0128653			
						Customer Account #					
						Pricing/Discount Code				View/edit b	to line item
	The item(s) in this group was You can no longer access thi Line(s): 1	retrieved from the supplier's website. What does this is item(s) on the supplier's website. What does this in	is mean? nean?								
	Product Descri	ption			Catalog No	Size / Pack	aging	Unit Price	Quantity	Ext. Price	23
	1 V Ziploc Double-	Zipper Bags, 1 Gallon, 1 3/4 mil., Clear, 11 H x 10	1/2 W, 250/Ct -	more info	458110	CT		45.44	1 CT	45.44 USD	
	Manufacturer N	lame D	versey, Inc.	Internal Note		Sup	plier Attn To:				
	Manufacturer P	art Number 94	602	Requisition Type	Hosted/Punchout/Non-Catalog	Item Exte	rnal Note				
	Supplier Part An	uxiliary ID			Hosted/Punchout/Non-Catalog It	Atta	chments for supplier				
	more info			Internal Attachments							
							Supplier	ubtotal		45.44U	SD
							Subtotal			45.44	
							Total			45.44 US	sD