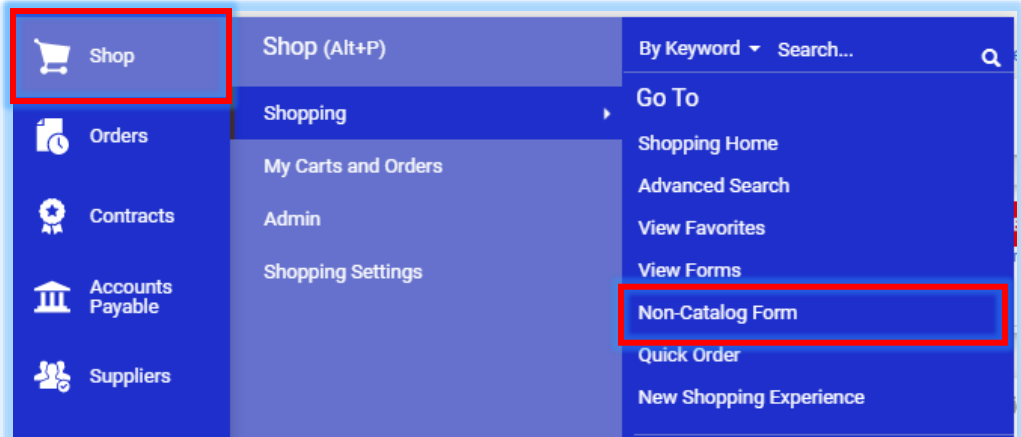


# E-Procurement System Tutorial: Creating a Non-Catalog Purchase Order

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

The **Non-Catalog 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 **Shop** icon then click **Non-Catalog Form**:



## Filling out the Non-Catalog form:

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

**Supplier Info**

Enter Supplier

or  
Supplier Search

**General Info**

Non-Catalog Form

254 characters remaining expand | clear

EA - Each

Capital Expense  
 Exception Approval

**Configurable Fields**

Product Size

Manufacturer Name

Manufacturer Part Number

UNSPSC

Health and Safety  Controlled substance  
 Recycled

**Supplier info**

Click **Supplier Search** to search for a supplier. Once the correct Supplier is found, click on the **Select** link to add the Supplier to the form.

- General info**
- Enter Item name/Number
  - Enter Item description Enter quantity
  - Optional: Provide adjust Packaging (UOM) if needed. Enter Estimated Price
  - Optional: these Configurable fields can be used if needed (Product Size through Bid Number)
  - Enter any notes pertaining to the order.

The screenshot shows a procurement form with several sections. On the right side, there is a list of checkboxes for 'Health and Safety' categories: Controlled substance, Recycled, Hazardous material, Radioactive, Rad Minor, Select Agent, Toxin, Energy Star, and Green. Below this is a 'Bid Number (if applicable)' field and a 'Notes' section. A red box highlights the 'External Info' section, which contains a dropdown menu labeled 'Contract?' with the text 'Please select...'. To the right of this form is a callout box titled 'External info' containing the following text: '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.' At the bottom right of the form, there is a 'Total' field showing '0.00' and a link to 'See configuration for this form'.

If you plan to add multiple line items to this cart, in **Available Actions**, select **Add to Cart and Return**. This will allow you to continue adding line items to the same cart.

The screenshot shows the 'Available Actions' dropdown menu. The selected option is 'Add to Cart and Return', and there is a 'Go' button next to it. A red box highlights the dropdown menu.

When entering the last line item, then choose **Add and go to Cart**.

If you are only adding this one line item to your cart, then select **Add and Go To Cart** and click **Go**.

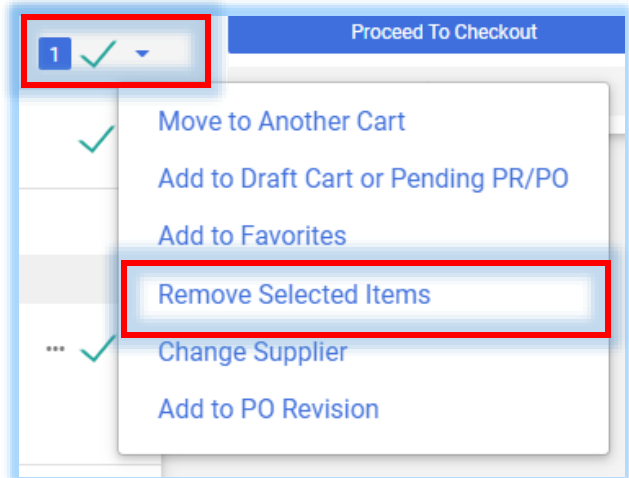
The screenshot shows the 'Available Actions' dropdown menu. The selected option is 'Add and go to Cart', and there is a 'Go' button next to it. A red box highlights the dropdown menu.

### **Reviewing Shopping Cart:**

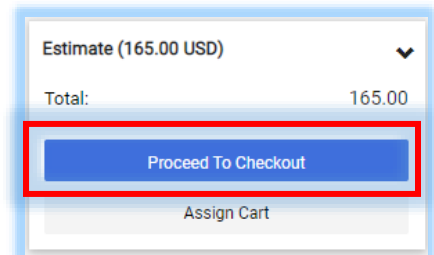
Prior to checking out, you are in the Shopping Cart. This is where you can make edits to your line items.

Multiple items can be added from as many vendors as desired to the cart. This can be done for punch out and non-catalog vendors as well.

To remove an item, click on the **checkbox** located to the far right of each line item. Click the down arrow to the checkmark at the top right of the line item list and select **Remove Selected Items**.



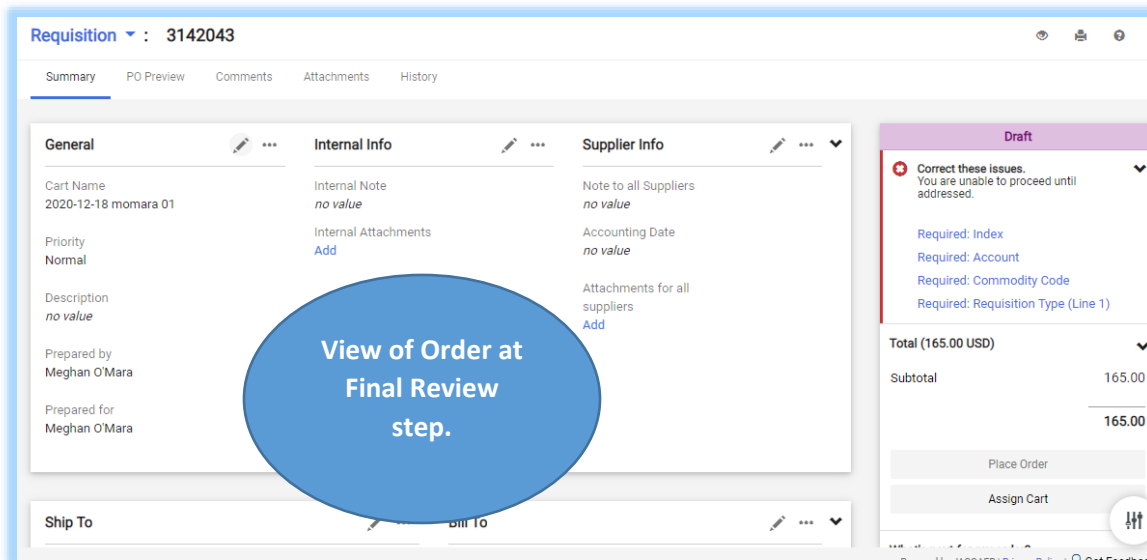
Once all desired items are in your cart\*, click **Proceed to Checkout**.





**\*PLEASE NOTE:** Once you leave the Shopping Cart, you will no longer have the functionality to remove a line item from your requisition.

### Checkout/Final Review- Entering FOAPAL Values:

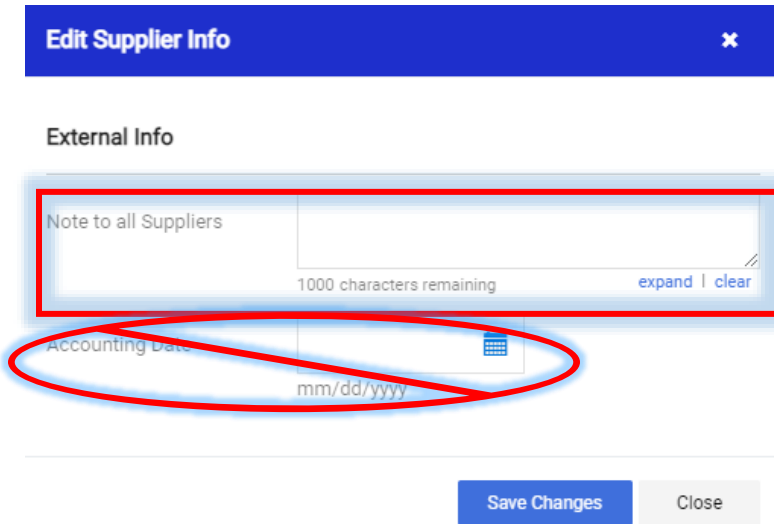
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.



To adjust information, click the **Pencil icon**  within the section you would like to edit. Then click on **Save Changes**.

Under the **Supplier Info** section, the user can add a note to the supplier by click on the **Pencil icon**  and entering the note within the **Note to all Suppliers** field (Please be sure the comment is not entered under the Internal Info section as the Supplier cannot view that information). Then click on **Save Changes**.


**PLEASE NOTE: NEVER** enter an **Accounting Date** as that will prevent the requisition from processing.




**Edit Supplier Info** ✕

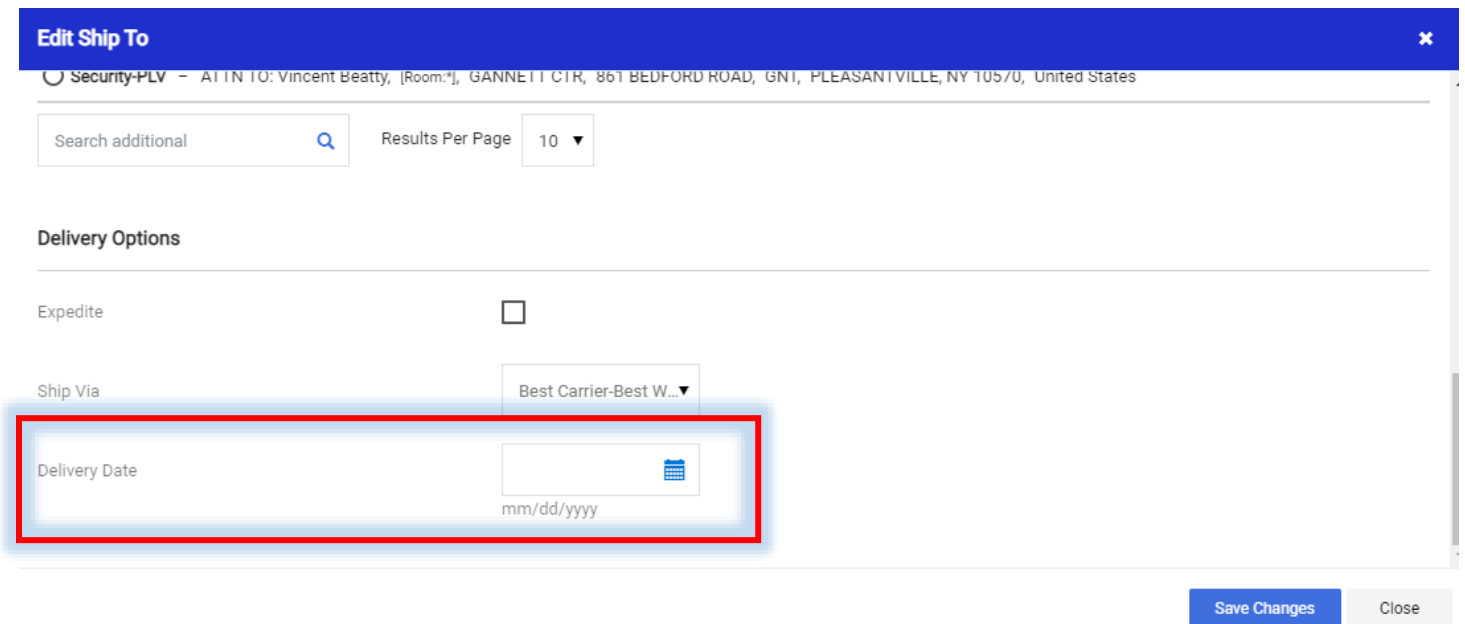
**External Info**

Note to all Suppliers  1000 characters remaining [expand](#) | [clear](#)

Accounting Date   mm/dd/yyyy


**Save Changes** **Close**

To specify a **Delivery Date** (this is optional), click on the **Pencil icon**  in the **Ship To** section. In the pop-up box, scroll down to Delivery Options and click on the calendar icon to select the date. Then click on **Save Changes**.



**Edit Ship To** ✕


Security-PLV - ATTN TO: Vincent Beatty, [Room:], GANNETT CTR, 861 BEDFORD ROAD, GNT, PLEASANTVILLE, NY 10570, United States

Search additional   Results Per Page 10 ▼

**Delivery Options**

Expedite

Ship Via Best Carrier-Best W... ▼

Delivery Date   mm/dd/yyyy

**Save Changes** **Close**

To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the **Comments** tab and then click on the plus icon, **+** towards the upper right to add a comment. The user has the option to select which document they would like the comment to appear (ie. Requisition, Purchase Order, Invoice etc. ) by selecting the dropdown menu to the left of the **+** icon. If not selected it will default to All.

Requisition ▾ : 141319114

Summary PO Preview **Comments** Attachments History

Records found: 0

Show comments for All ▾ +

**ADD COMMENT** ✓ ✕

This will add a comment to the document.


Attach file (optional)

Attachment Type  File  Link/URL


File Name

File

1000 characters remaining expand | clear

Once the Comment is entered, click on the checkmark icon,  towards the upper right of the Comment box.





**ONLY after the requisition is created and in workflow, can the user specify the person/user they would like to send the comment to.**

To adjust any **FOAPAL Value** information, click the Pencil icon  (located in the upper right of the corresponding box) to modify any values listed.

An **Edit FOAPAL Values** pop-up box will appear.

**Edit FOAPAL Values** ✕

FOAPAL Values

Index	Account	Commodity Code	Chart
<input type="text" value="Search"/> 	<input type="text" value="Search"/> 	<input type="text" value="Search"/> 	<input type="text" value="1"/> 


Required  Required  Required

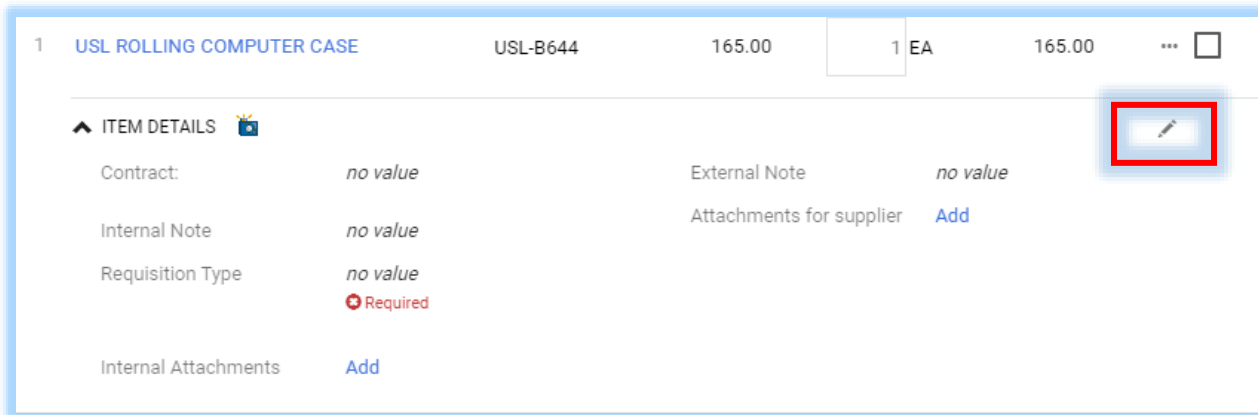
To search for available values, click on the Arrow icon  located towards the right of the field to open a search.

Please refer to additional documentation, “**Adding a Split to FOAPAL Values**” and “**Adding FOAPAL Values on Line Items**” for more information on adding multiple FOAPAL values and updating each line item.

Once completed click on the **Save Changes** button.


### Line Item Changes:

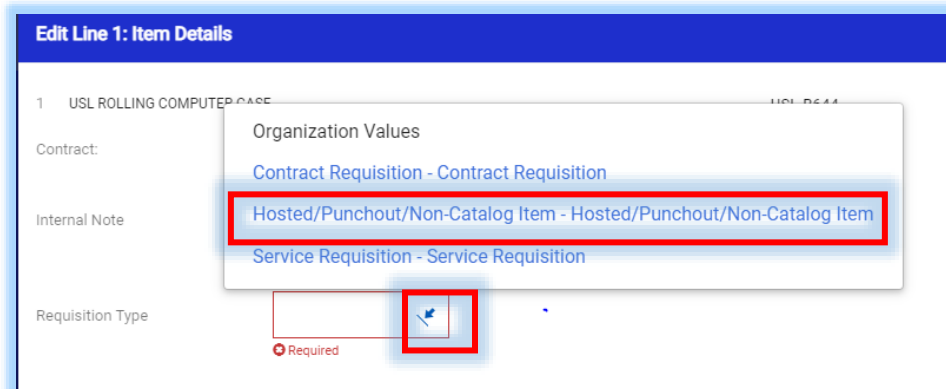
To adjust Supplier/Line Item Details, click the Pencil icon  (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save Changes**.



The screenshot shows a line item summary for 'USL ROLLING COMPUTER CASE' with contract 'USL-B644', quantity '1 EA', and price '165.00'. Below the summary is an 'ITEM DETAILS' section with a pencil icon in the top right corner, highlighted by a red box. The details include fields for Contract, Internal Note, Requisition Type (marked as Required), and Internal Attachments.

When the Edit Line Item Details pop-up box appears it is required to select the **Requisition type**. This value is usually set as a default, but if an error appears follow the below to edit:

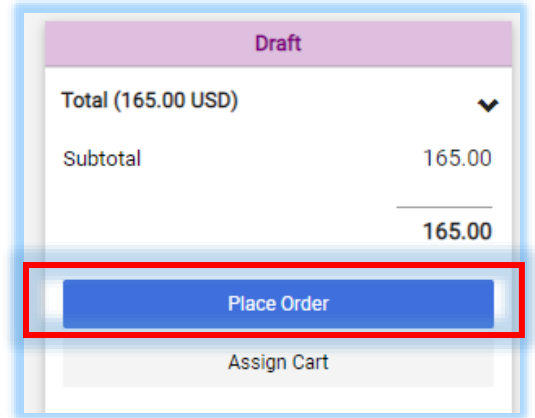
To open the dropdown menu click on the blue arrow  in the right of the field box. Then select **Hosted/Punchout/Non-Catalog Item-Hosted/Punchout/Non-Catalog Item** and click **Save**.



The screenshot shows the 'Edit Line 1: Item Details' pop-up window. A dropdown menu is open over the 'Requisition Type' field, which is marked as Required. The dropdown options are: 'Organization Values', 'Contract Requisition - Contract Requisition', 'Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item' (highlighted with a red box), and 'Service Requisition - Service Requisition'. A blue arrow icon in the field box is also highlighted with a red box.

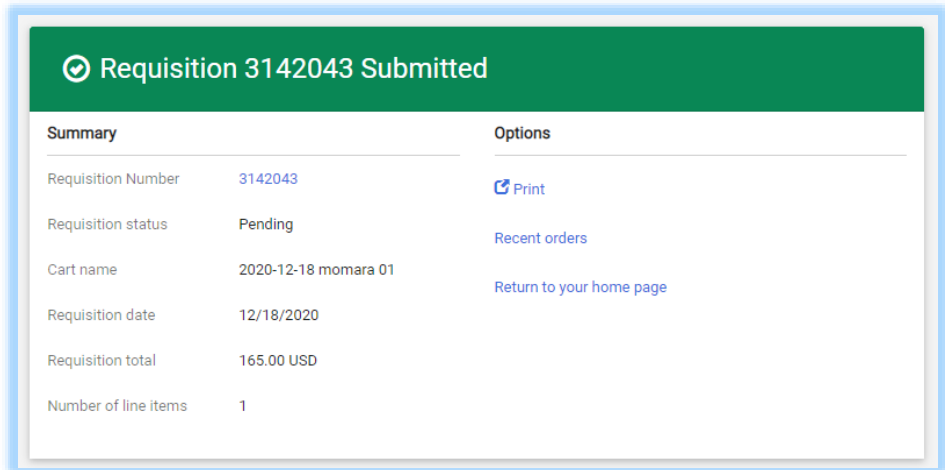
Once all edits have been completed, click on **Place Order** to the right of the screen.

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



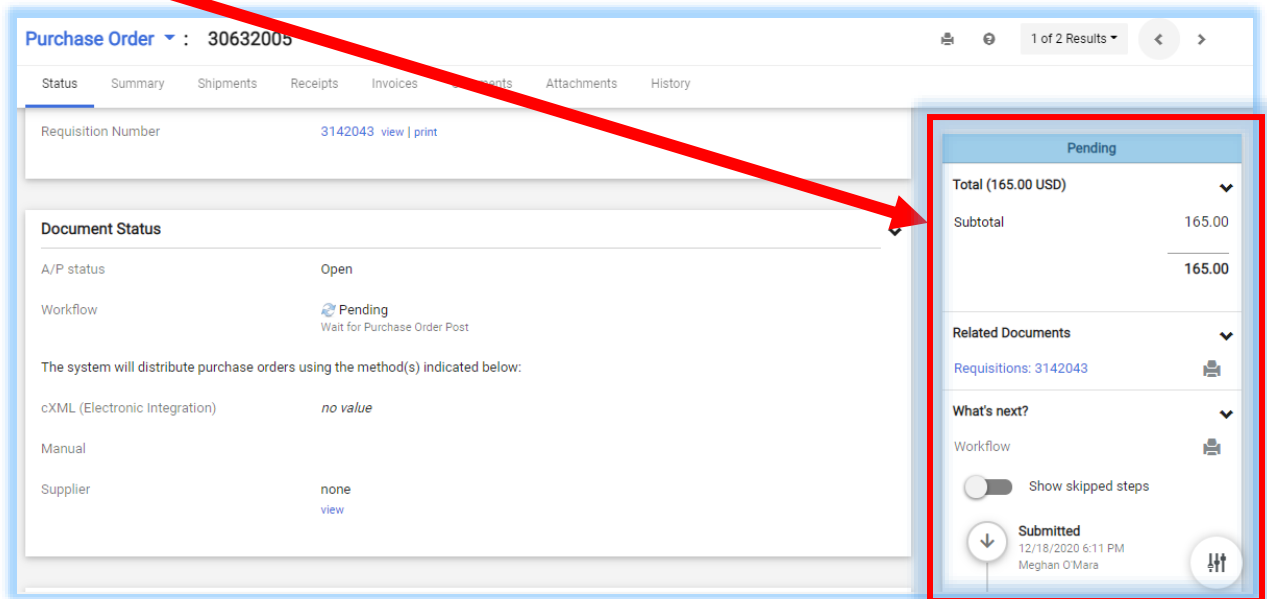
**Viewing the Requisition Status and Details:**

To view requisition details after submitting click on the linked **Requisition number:**



**IMPORTANT:** The **Approval Workflow** has moved. It is no longer on a separate tab within the Requisition.

The **Approval Workflow** is showcased in the right hand panel. Use the scroll bar within the panel to view the full workflow:



Click the **History** tab located at the top of the requisition to view details of the workflow.

Click the **Summary** tab and scroll to the bottom (in the Line Item section) to retrieve the **Purchase Order** number.

Requisition : 3142043

Summary PO Preview Comments Attachments History

Start date End date User Requisition

Filter Clear All Filters Export CSV

1-13 of 13 Results 20 Per Page

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	12/18/2020 6:01 PM	System	Banner Budget Check	Requisition approved				
	12/18/2020 6:01 PM	Meghan O'Mara		Requisition submitted				
Line 1	12/18/2020 6:00 PM	Meghan O'Mara		Requisition modified	Requisition Type	empty		Hosted/Punchout/Non-Catalog Item
	12/18/2020 5:54 PM	Meghan O'Mara		Requisition modified	Chart	1	1:50%, 1:50%	

1 Item

Staples · 1 Item · 165.00 USD

SUPPLIER DETAILS

PO Number  
30632005

Pricing/Discount Code  
no value