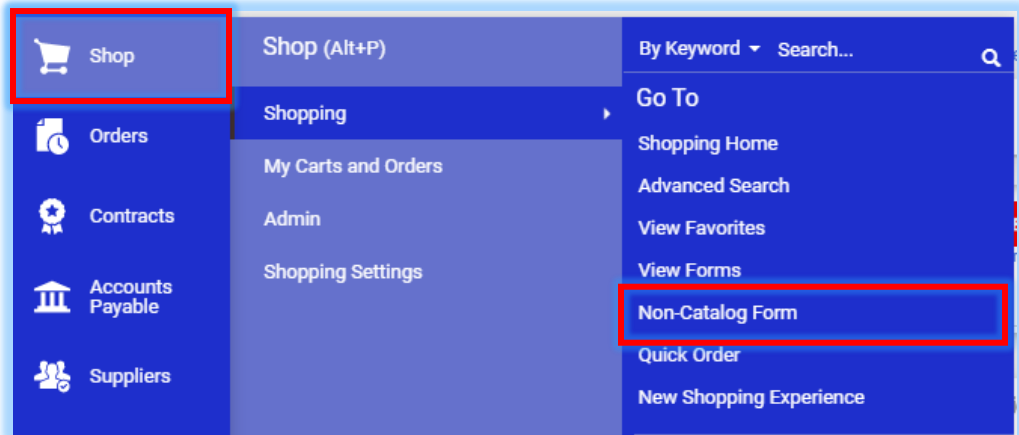


E-Procurement System Tutorial: Creating a Non-Catalog Purchase Order

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:

Form • Non-Catalog Form

Supplier Info

Existing Supplier

Enter Supplier *

General Info

Non-Configurable Fields

Request Type *

Item Name/No. *

Product Description *
254 characters remaining expand clear

Quantity *

Packaging

Estimated Price *

Capital Expense ☐

☐ Exception Approval

Configurable Fields

Product Size

Manufacturer Name

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.

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 expand clear

External Info

Contract? * Please select...

Contract

Contract No.

Request for Proposal #

External Attachments Add

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.

If you plan to add multiple line items to this cart, click on the menu in the upper right and select **Add to Cart and Return**. This will allow you to continue adding line items to the same cart.

Close Add And Go To Cart

Add to Cart and Return

Add to Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Add to new Cart

When entering the last line item, click on **Add and go to Cart** in the upper right.

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

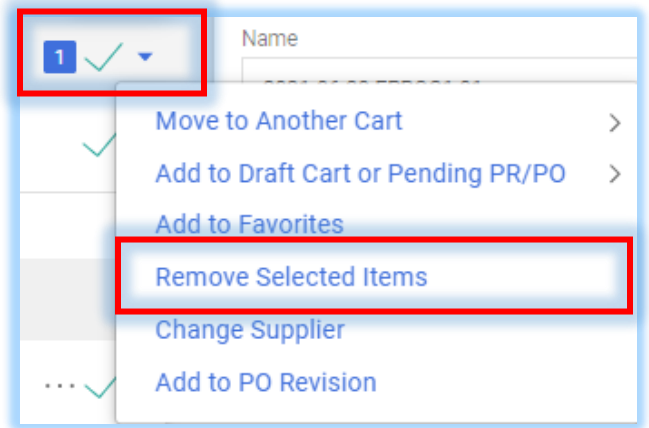
Close Add And Go To Cart

Reviewing Shopping Cart:

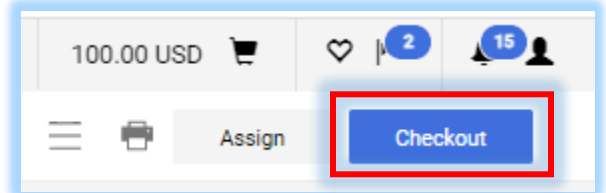
Prior to checking out, you are in the Shopping Cart. This is where you can make edits to your line items.

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**.



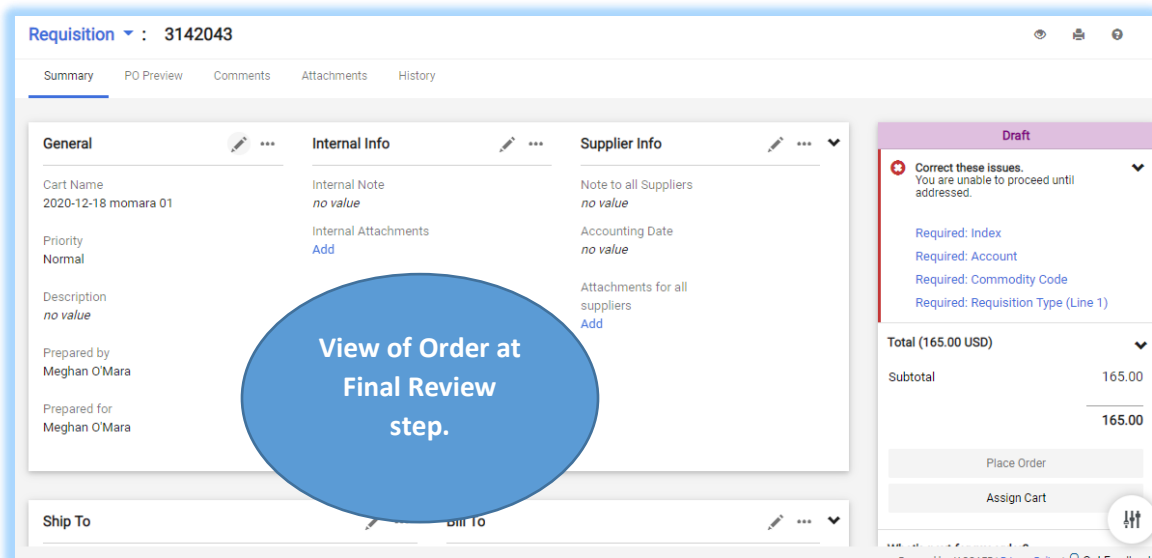
Once all desired items are in your cart*, click **Checkout** located in the upper right-hand corner





***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:1], GANNETT CTR, 861 BEDFORD ROAD, GNT1, PLEASANTVILLE, NY 10570, United States

Search additional 


Results Per Page 10 ▼

Delivery Options

Expedite ☐



Ship Via Best Carrier-Best W... ▼

Delivery Date

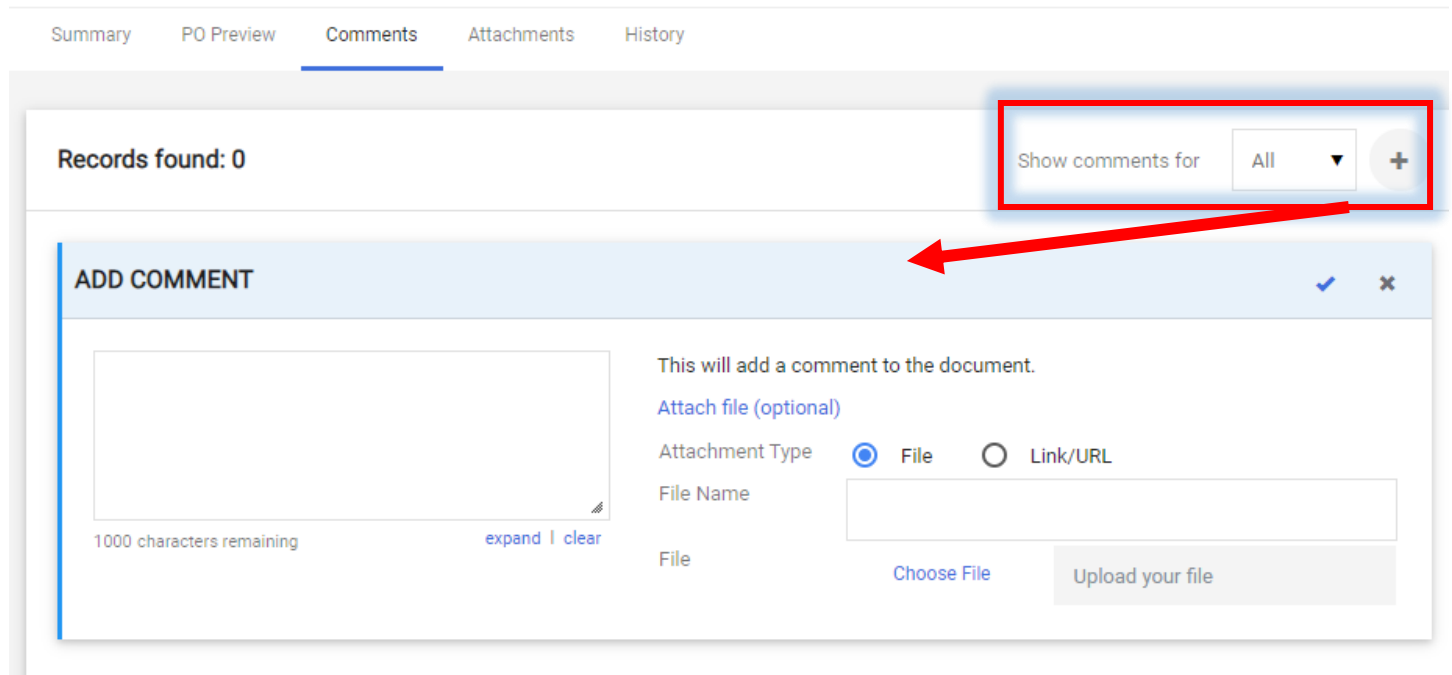
mm/dd/yyyy 


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

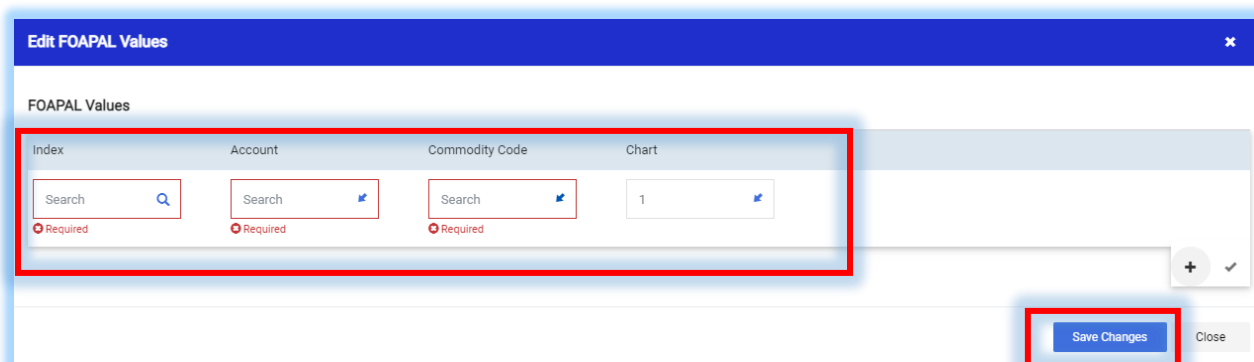


Once the Comment is entered, click on the checkmark icon,  towards the upper right of the Comment box.

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.




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**.

1

USL ROLLING COMPUTER CASE

USL-B644

165.00

1

EA

165.00

...

ITEM DETAILS

Contract:

no value

External Note

no value

Internal Note

no value

Attachments for supplier

Add

Requisition Type


no value

Required

Internal Attachments

Add

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**.

1

Test

Contract:

Internal Note

Requisition Type *

Hosted/Punchout/Non-Catalog Item

1000 characters remain

Hosted/Punchout/Non-Catalog Item

Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item

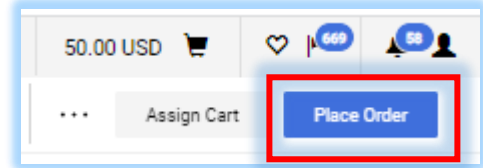
Organization Values

Contract Requisition - Contract Requisition

Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item

Service Requisition - Service Requisition

Once all edits have been completed, click on **Order** located towards the upper 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**:

✔ Requisition 3644629 Submitted	
Summary	Options
Requisition number	3644629
Requisition status	Pending
Cart name	2022-11-04 momara 02
Requisition date	11/4/2022
Requisition total	50.00 USD
Number of line items	1
Print	
Recent orders	
Return to your home page	

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:

Requisition • 3644629

Summary PO Preview Comments Attachments History

General	Internal Info	Supplier Info
Cart Name: 2022-11-04 momara 02	Internal Note: no value	Note to all Suppliers: no value
Priority: Normal	Internal Attachments	Accounting Date: no value
Description: no value		Attachments for all suppliers
Prepared by: Meghan O'Mara		
Prepared for: Meghan O'Mara		

Ship To Bill To

Ship To: Contact Name ATTN TO: Meghan O'Mara, Phone +1 914-923-2684 ext. 22684, Email momara@pace.edu, 100 Summit Lake Drive, 3rd Floor, Valhalla, NY 10595, United States

Bill To: Pace University, Accounts Payable Department, PO Box 2500, Briarcliff Manor, NY 10510-0352, United States

Pending

Total (50.00 USD)

Subtotal 50.00

50.00

What's next?

Workflow

Show skipped steps

Submitted 11/4/2022 11:16 AM Meghan O'Mara

Banner Budget Check Completed System

Department Approval Active

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

The screenshot displays a requisition workflow interface. At the top, the requisition number is 3644629. Below this, there are tabs for Summary, PO Preview, Comments, Attachments, and History. The History tab is selected and highlighted with a red box. A red arrow points to the History tab. Below the tabs, there are filters for Start date, End date, Requisition, and Document type. A table shows the workflow steps for the requisition. A red arrow points from the History tab to a detailed view of a line item.

Requisition • 3644629

Summary PO Preview Comments Attachments History

Start date mm/dd/yyyy End date mm/dd/yyyy

Requisition Document type

Filter Clear All Filters

Line No	Date/Time ↓	User	Step(s)	Action
11/4/2022	System	Banner Budget Check	Requisition approved	
			Requisition submitted	
			Requisition modified	

1 Item

Staples • 1 Item • 165.00 USD

▲ SUPPLIER DETAILS 📄

PO Number 30632005

Pricing/Discount Code no value

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