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

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**.
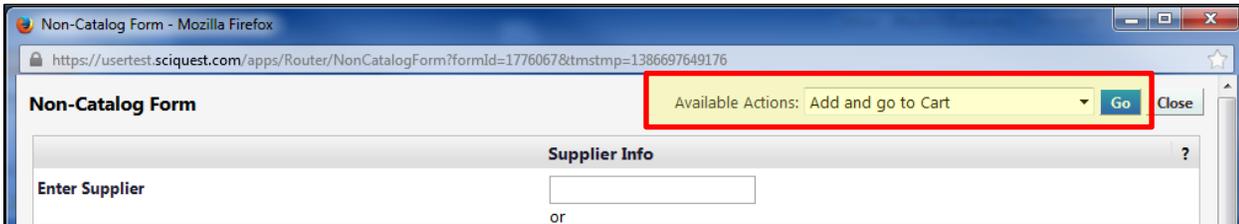
✓ If there are additional items that need to be added to the cart, then click **shopping cart** on the left of the screen. Multiple items can be added from as many vendors as desired to the cart. This can be done for hosted and punch-out vendors as well.

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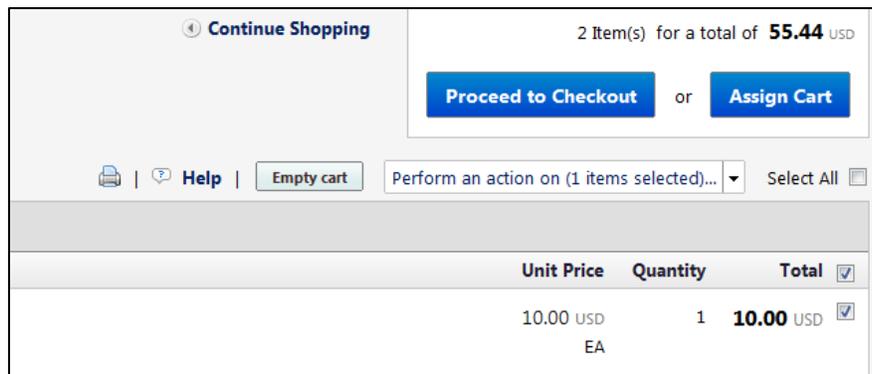
➢ Once all desired items are in your cart, click **Proceed to Checkout.**

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**.
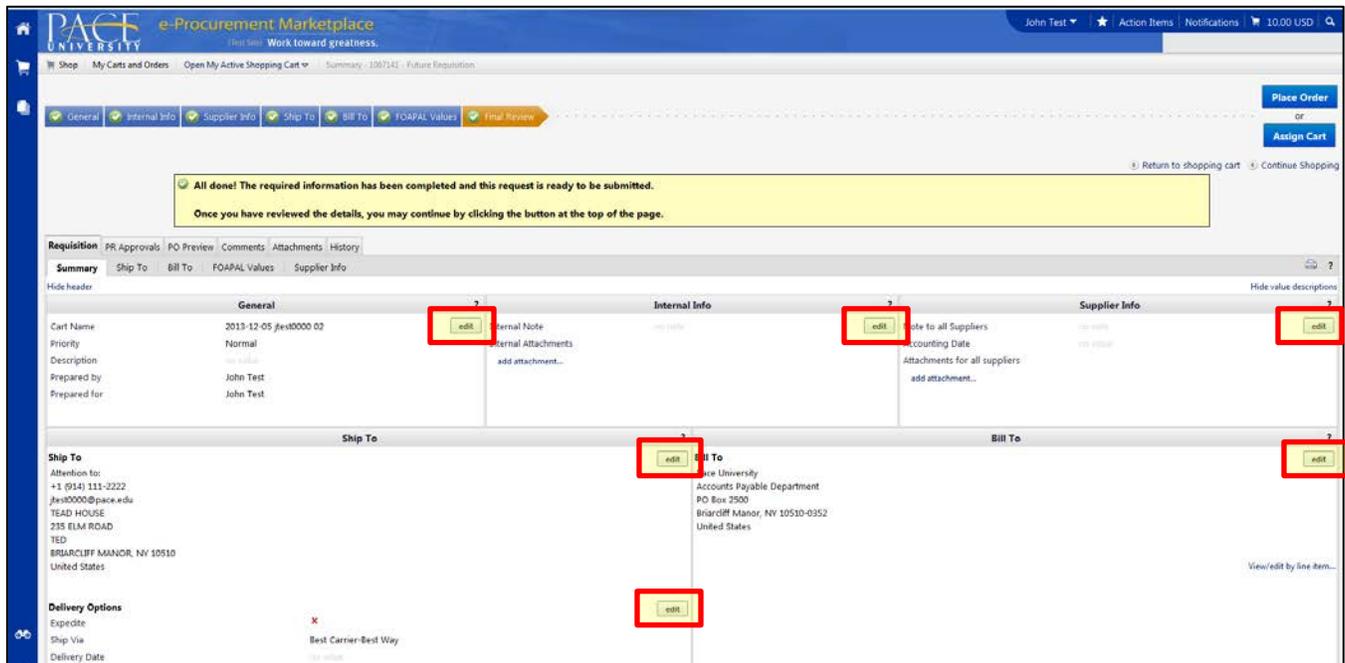
> ➤ To adjust any **FOAPAL Value** information, click **Edit** (located in the upper right of the corresponding box) to modify any values listed. After changes have been made, click **Save**.
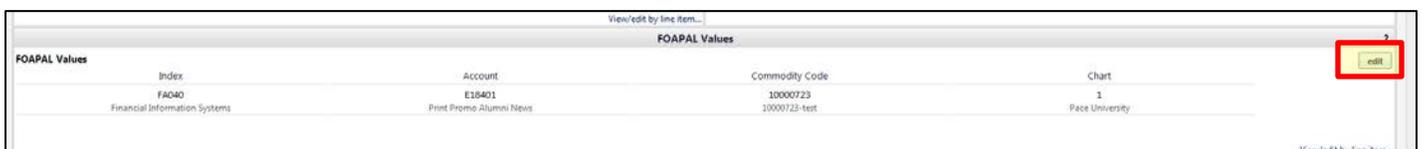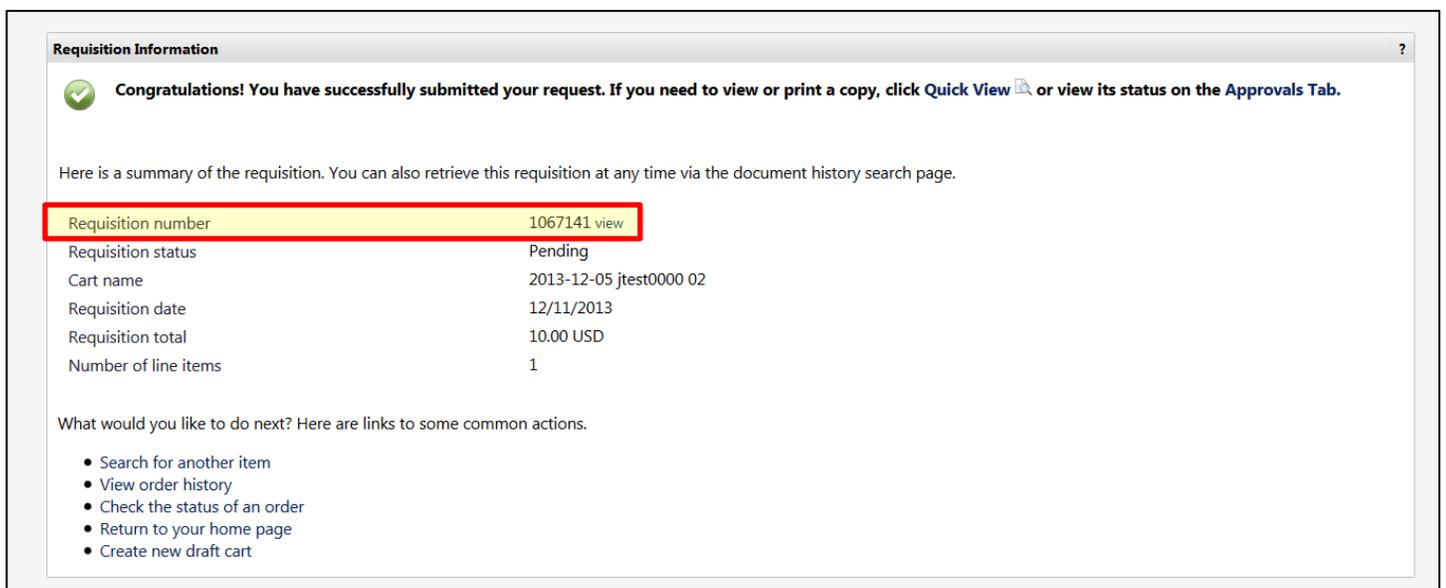
➢ To adjust **Supplier/Line Item Details**, click **Edit** (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save**.
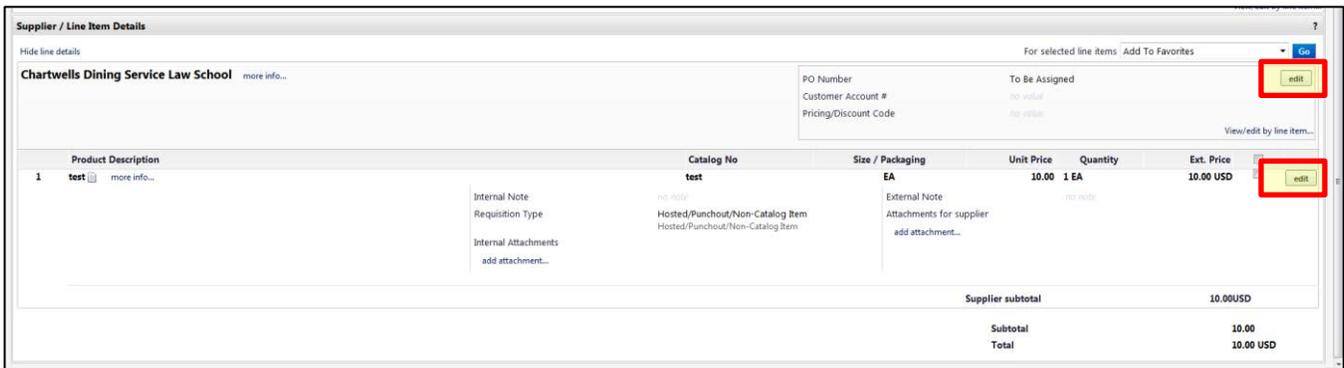
➢ Once all edits have been completed, click **Place Order**.

*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.

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

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