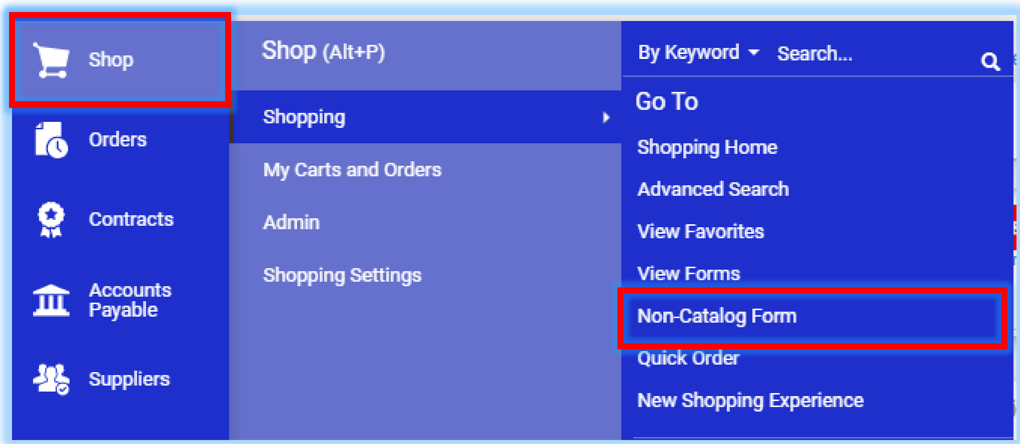
E-Procurement System Tutorial: Creating a Non-Catalog Purchase Order

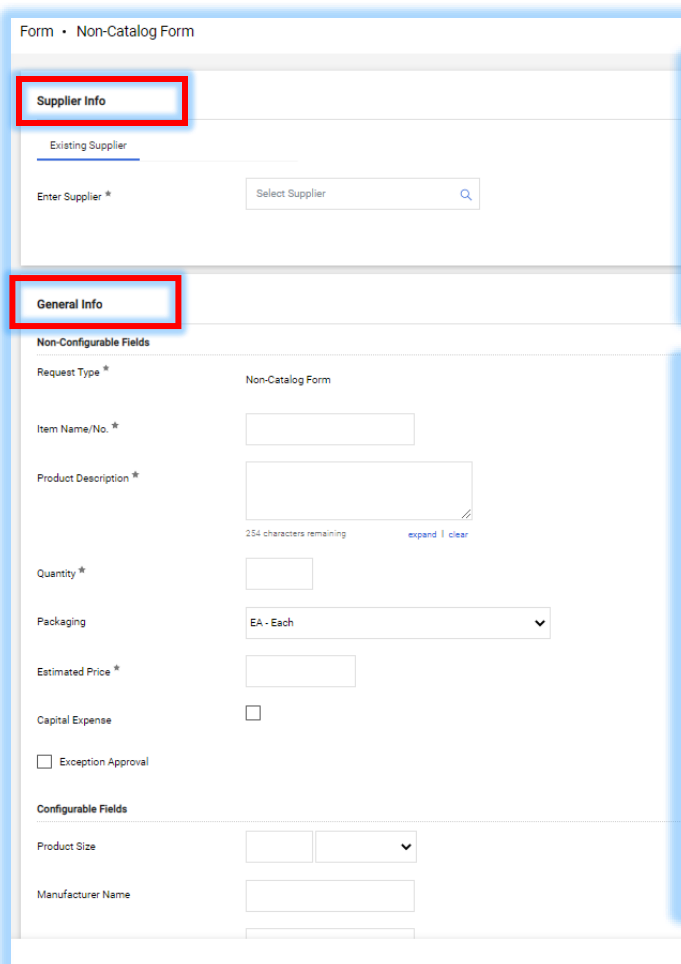
E-Procurement is an online system, which allows the user to purchase products/services from vendors.

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:

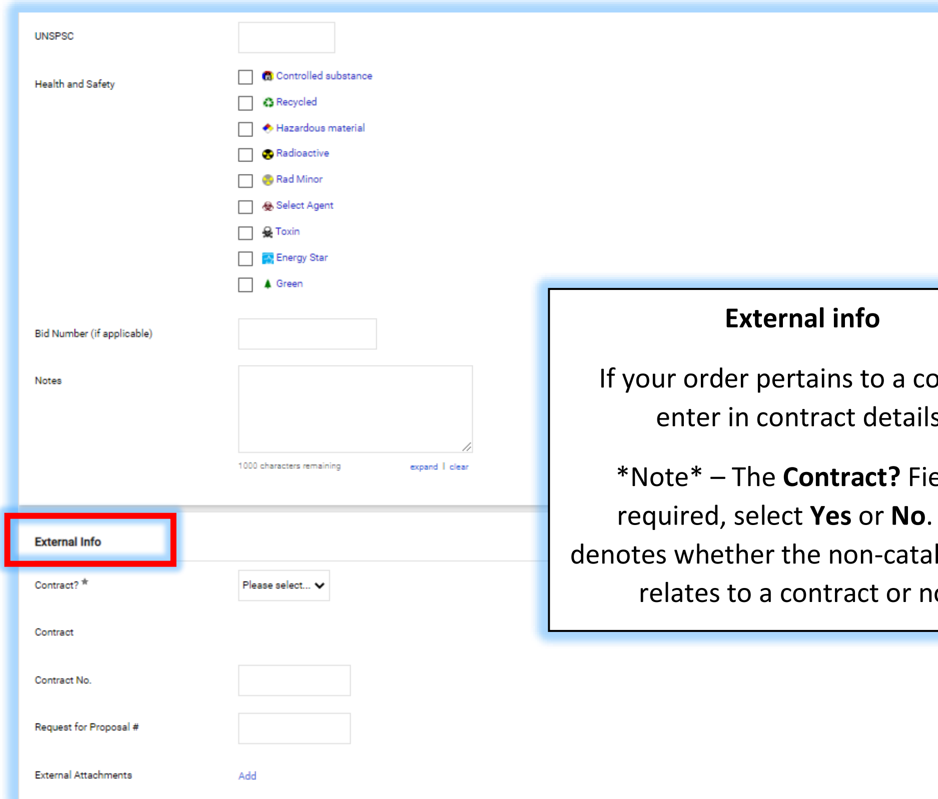


Supplier info

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.

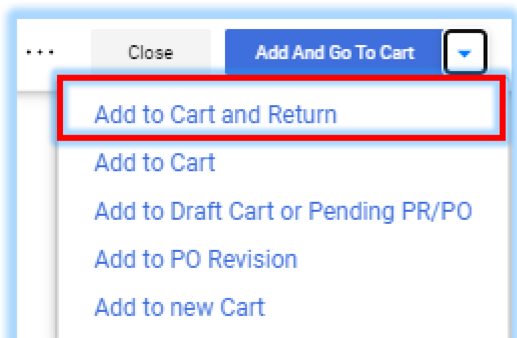


External info

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.



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

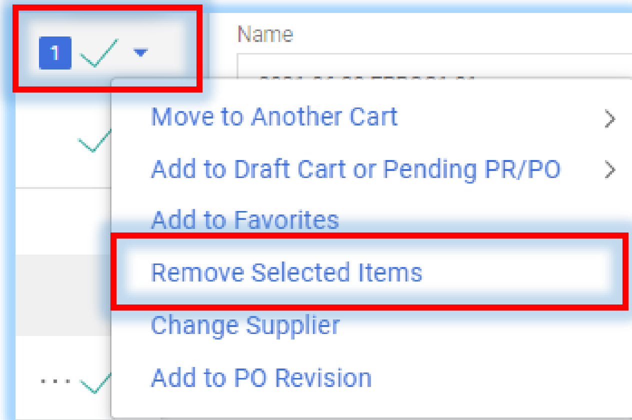
If you are only adding this one line item to your cart, then click on **Add and Go To Cart**.

Reviewing Shopping Cart:

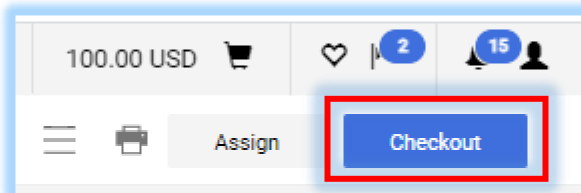
Prior to checking out, you are in the Shopping Cart. This is where you can make edits to your line items.

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.**



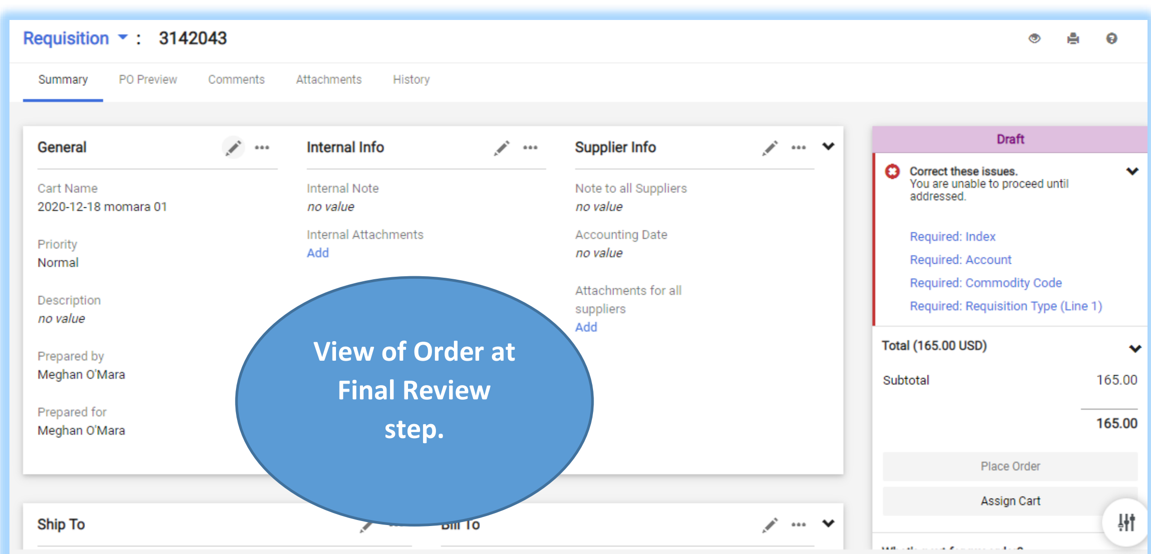
Once all desired items are in your cart*, click **Checkout** located in the upper right-hand corner



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

<u>Checkout/Final Review- Entering FOAPAL Values:</u>

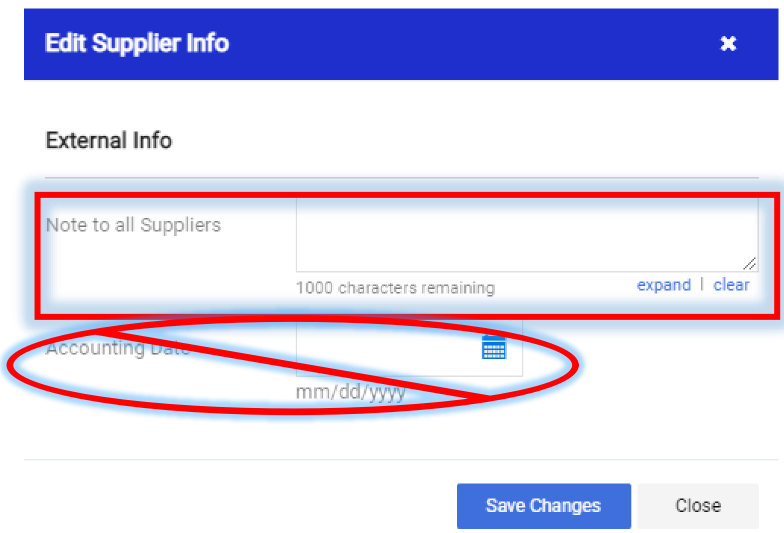
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.



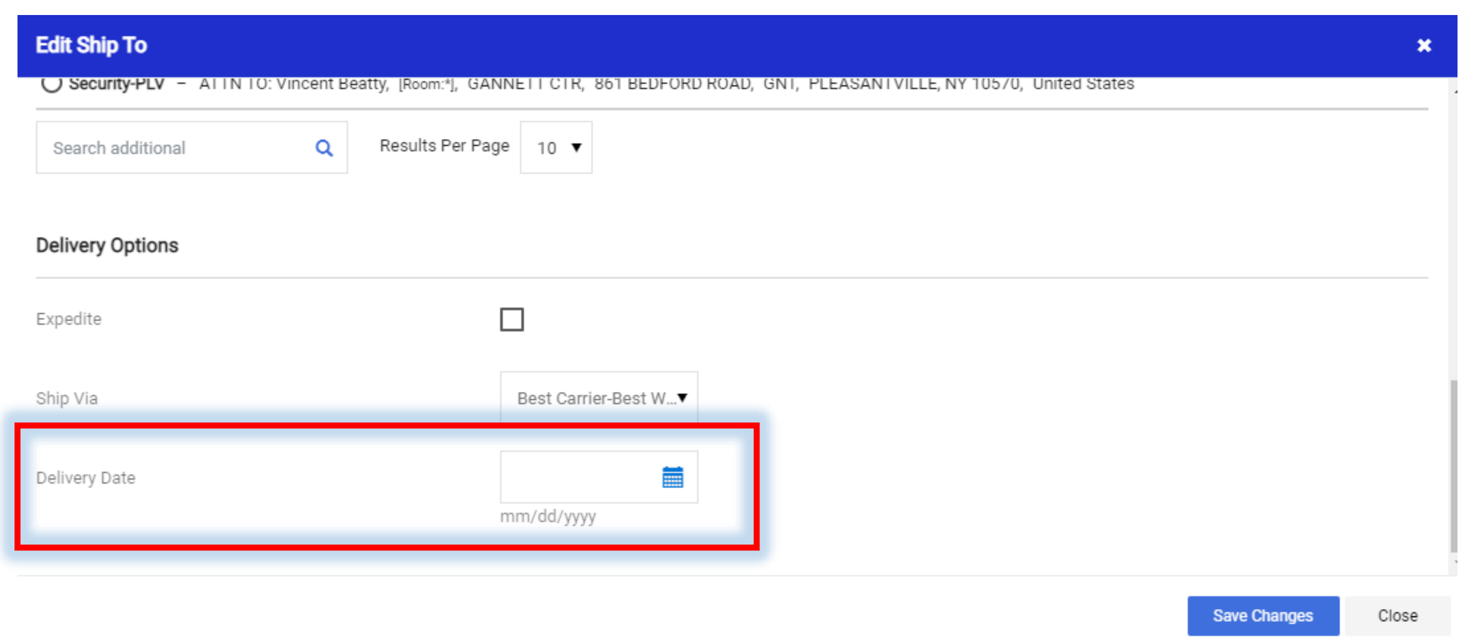
To adjust information, click the **Pencil icon** within the section you would like to edit. Then click on **Save Changes**.

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**.

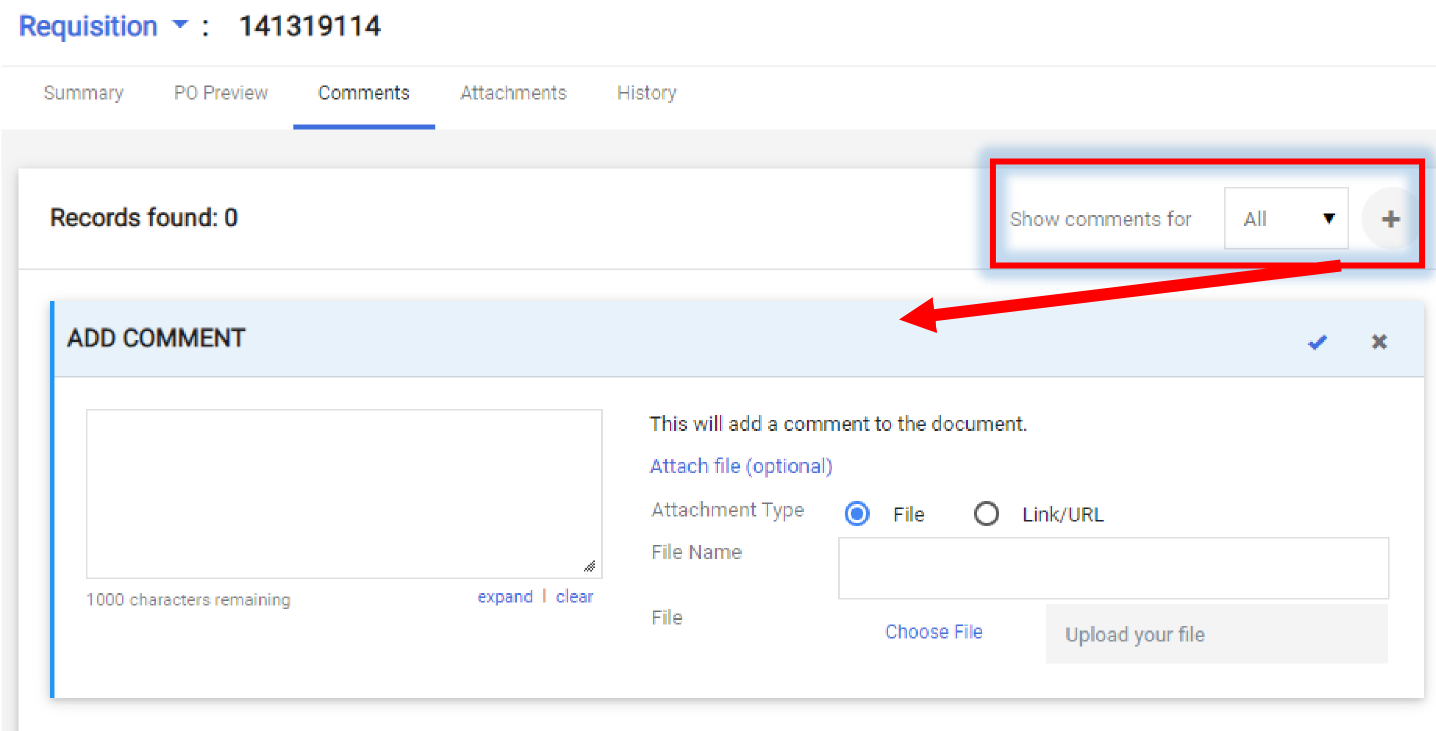
PLEASE NOTE: **<u>NEVER</u>** enter an **Accounting Date** as that will prevent the requisition from processing.



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**.



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.

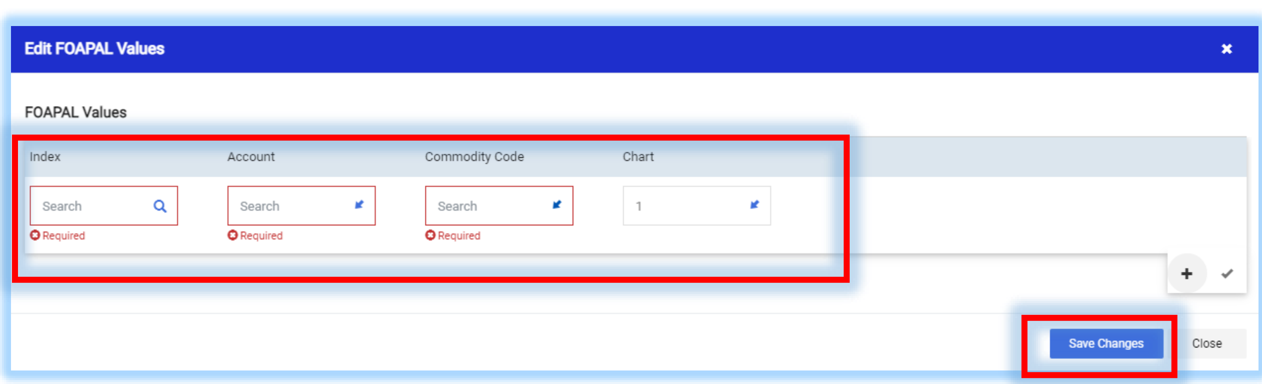


Once the Comment is entered, click on the checkmark icon, towards the upper right of the Comment box.

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

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.



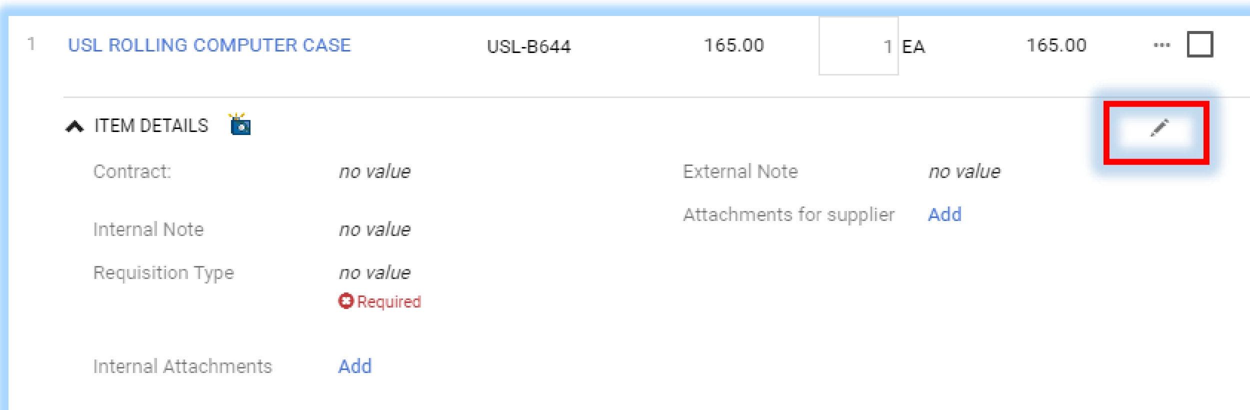
To search for available values, click on the Arrow icon located towards the right of the field to open a search.

*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.

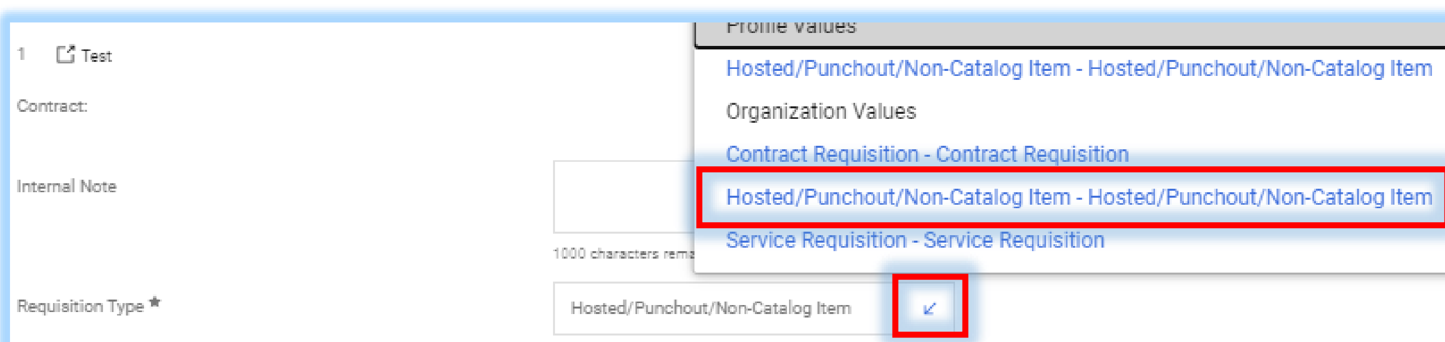
<u>Line Item Changes:</u>

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**.

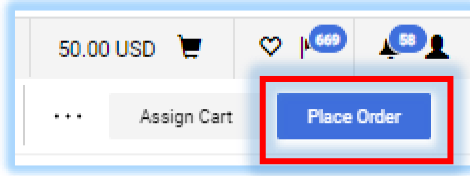


When the Edit Line Item Details pop-up box appears it is required to select the **Requisition type**. This value is usually set as a default, but if an error appears follow the below to edit:

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**.



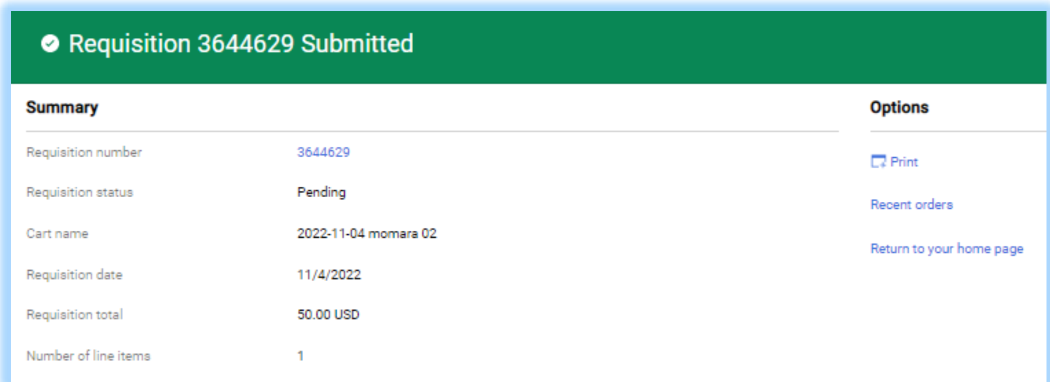
Once all edits have been completed, click on **Order** located towards the upper right of the screen.



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

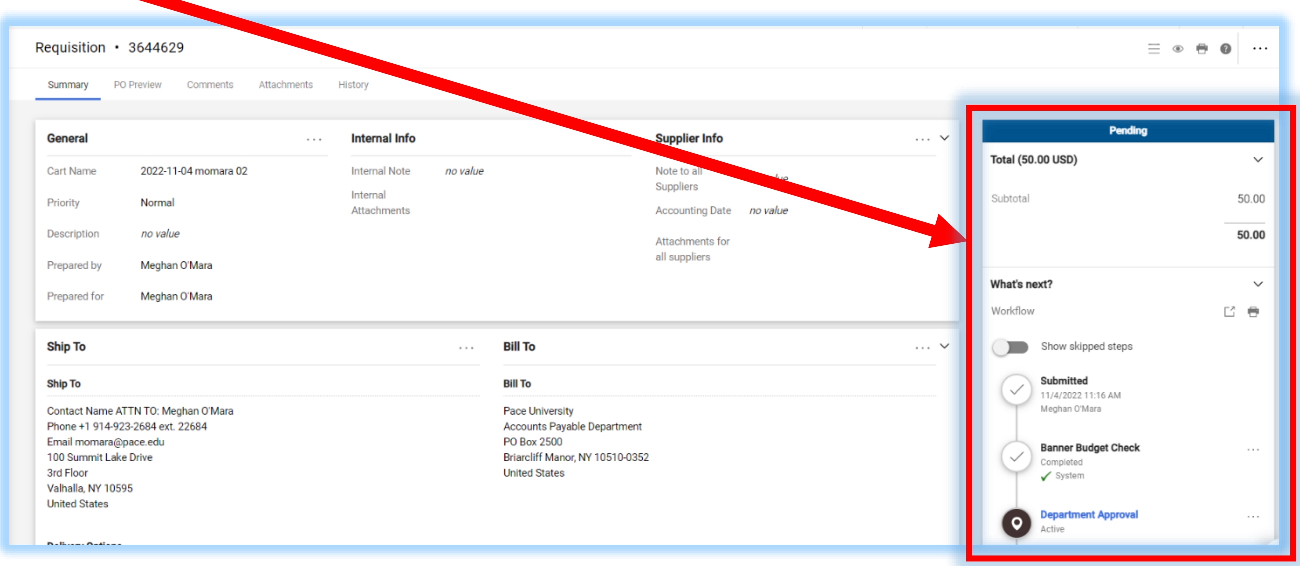
<u>Viewing the Requisition Status and Details</u>:

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

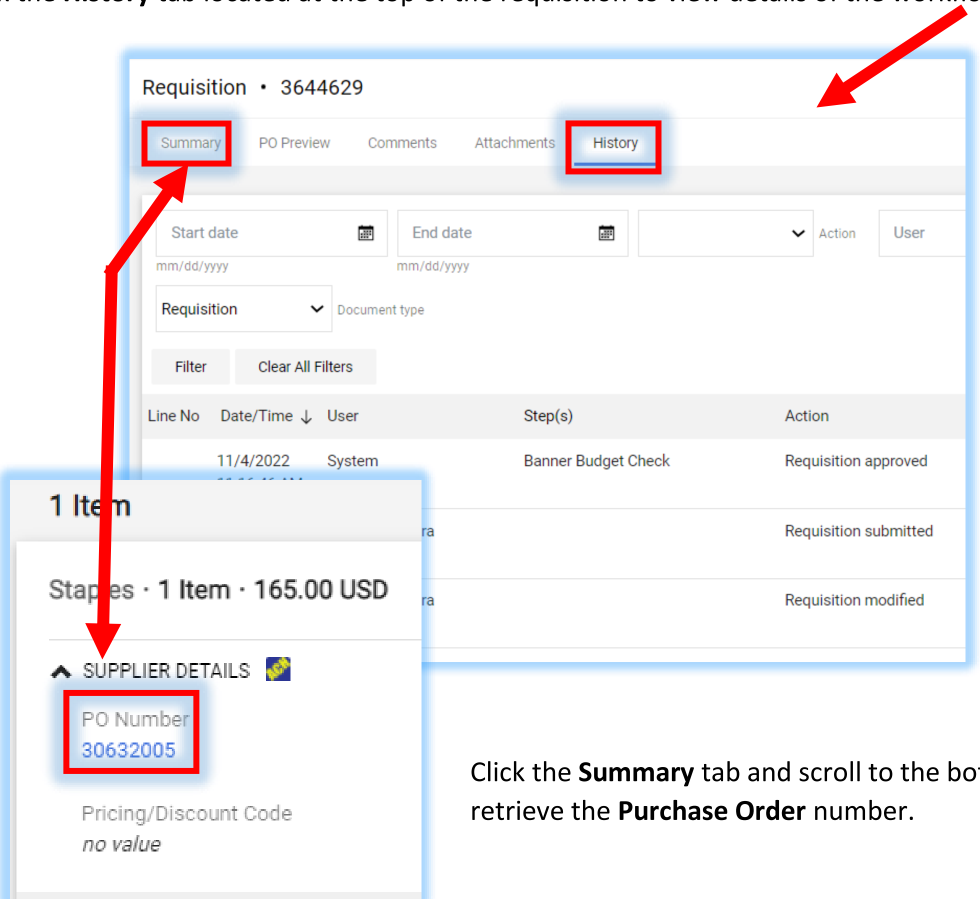


<u>IMPORTANT</u>: The **Approval Workflow** has moved. It is no longer on a separate tab within the Requisition.

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.