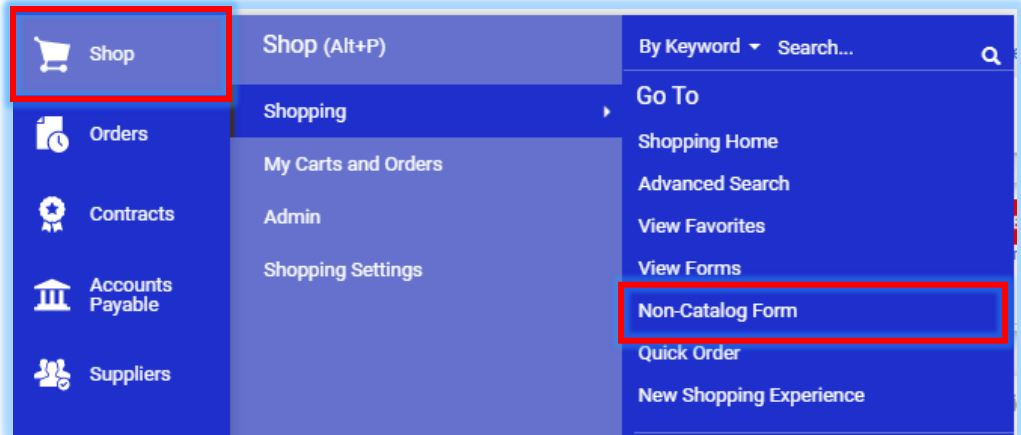


E-Procurement System Tutorial: Creating a Non-Catalog Purchase Order

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 * Select Supplier

General Info

Non-Configurable Fields

Request Type * Non-Catalog Form

Item Name/No. *

Product Description *
254 characters remaining expand | clear

Quantity *

Packaging EA - Each

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? #

Contract

Contract No.

Request for Proposal #

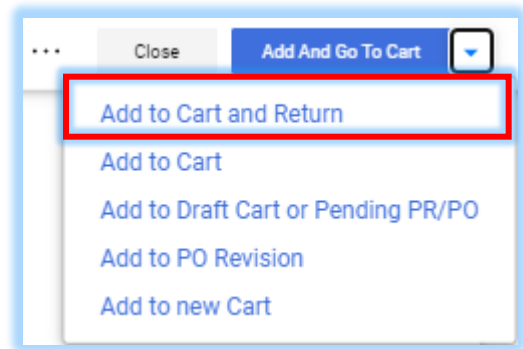
External Attachments [Add](#)

External info

If your order pertains to a contract enter in contract details.

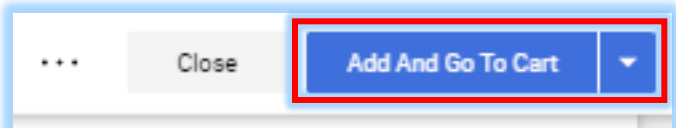
Note – The **Contract?** Field is required, select **Yes** or **No**. This denotes whether the non-catalog form relates to a contract or not.

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.



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**.

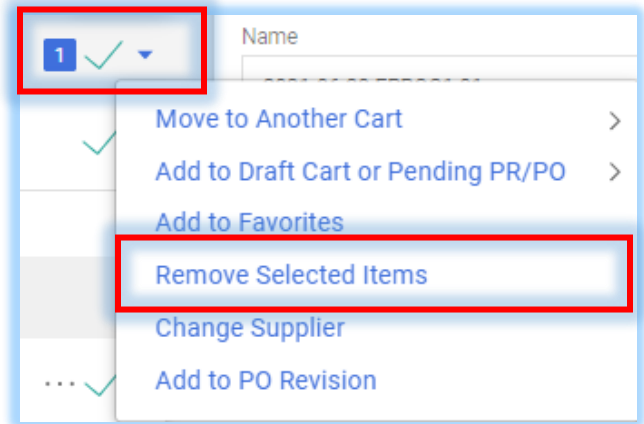


Reviewing Shopping Cart:

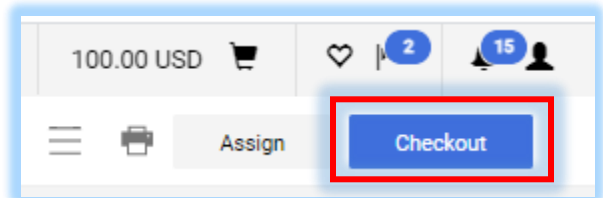
Prior to checking out, you are in the Shopping Cart. This is where you can make edits to your line items.

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**.



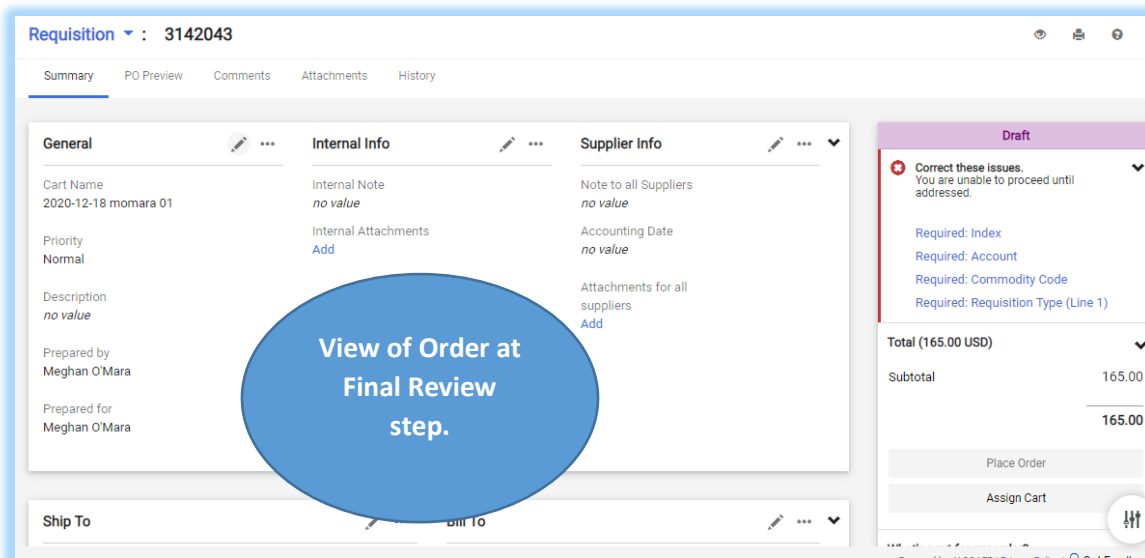
Once all desired items are in your cart*, click **Checkout** located in the upper right-hand corner





***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:

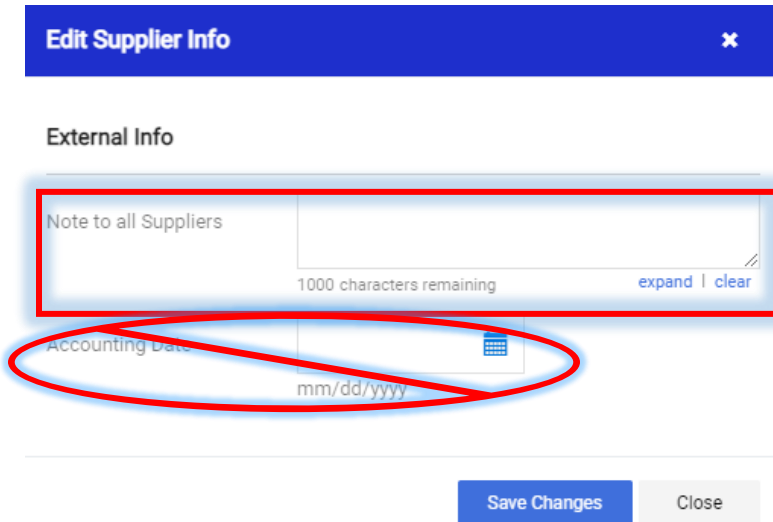
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.



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 ✕

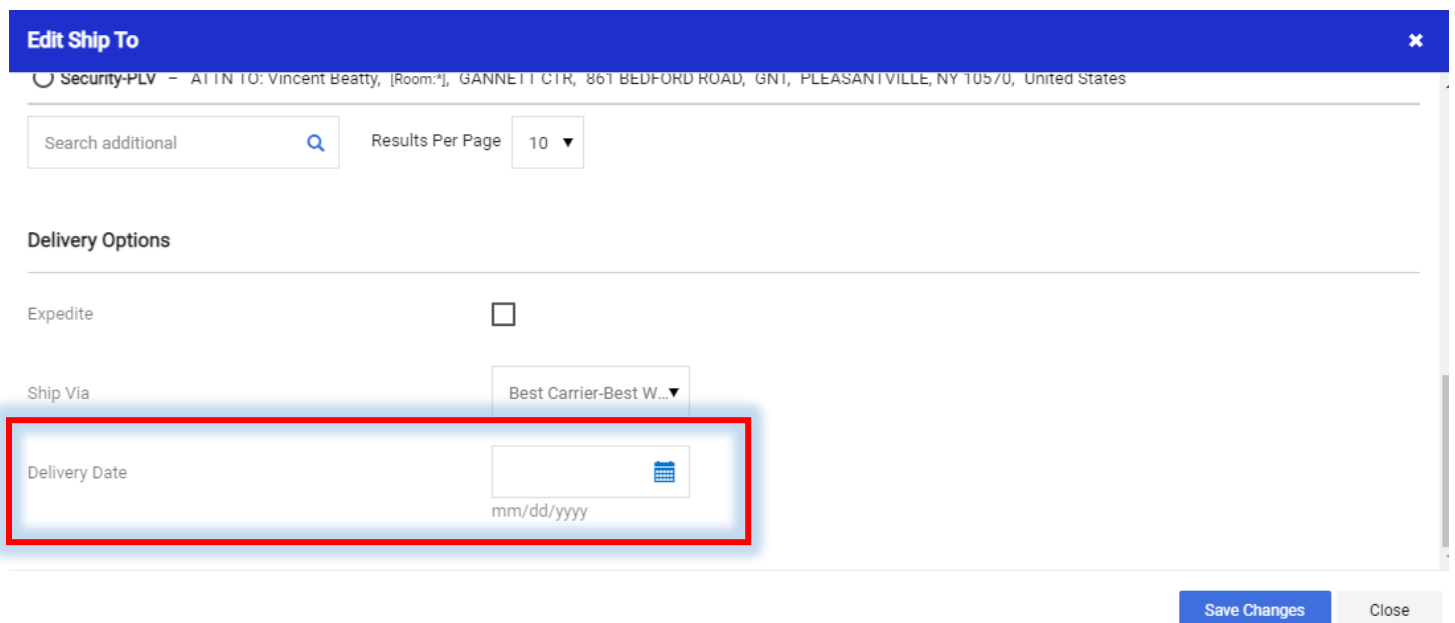
External Info

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"/> Q	<input type="text" value="Search"/> ✎	<input type="text" value="Search"/> ✎	<input type="text" value="1"/> ✎


Save Changes Close

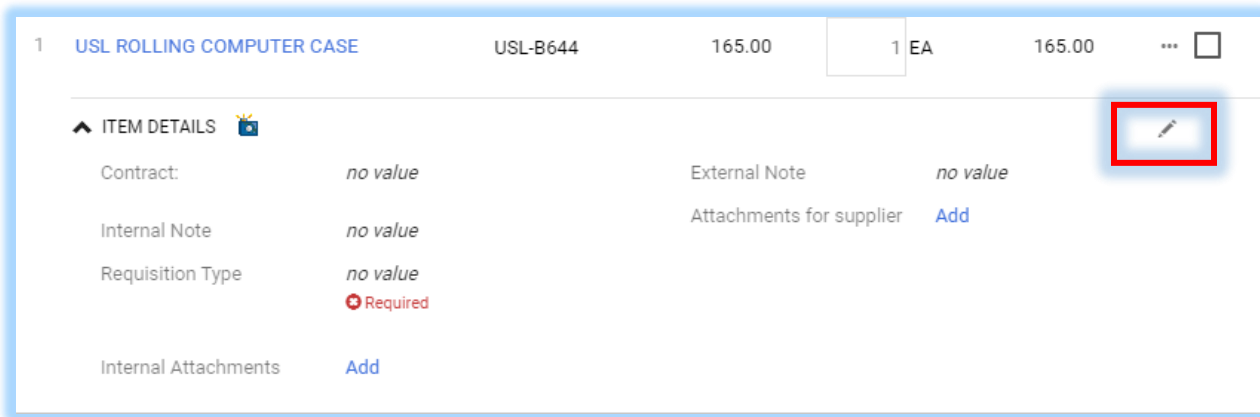
To search for available values, click on the Arrow icon  located towards the right of the field to open a search.

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 with the following details:

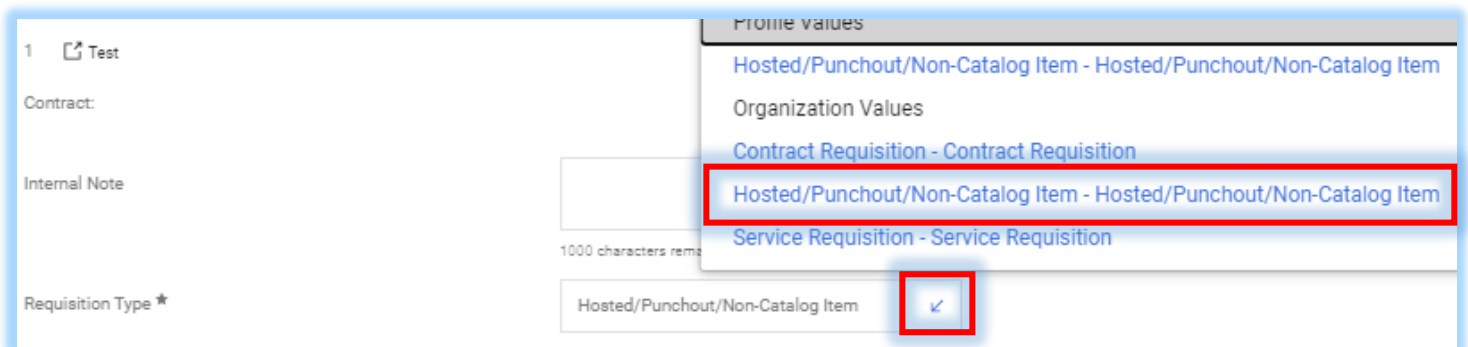
1	USL ROLLING COMPUTER CASE	USL-B644	165.00	1	EA	165.00	...	
---	---------------------------	----------	--------	---	----	--------	-----	---

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**.

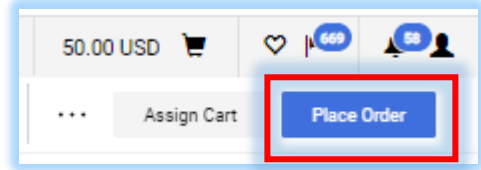


The screenshot shows the 'Requisition Type' dropdown menu with the following options:

- 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

The selected option is highlighted with a red box. The dropdown arrow icon is also highlighted with a red box.

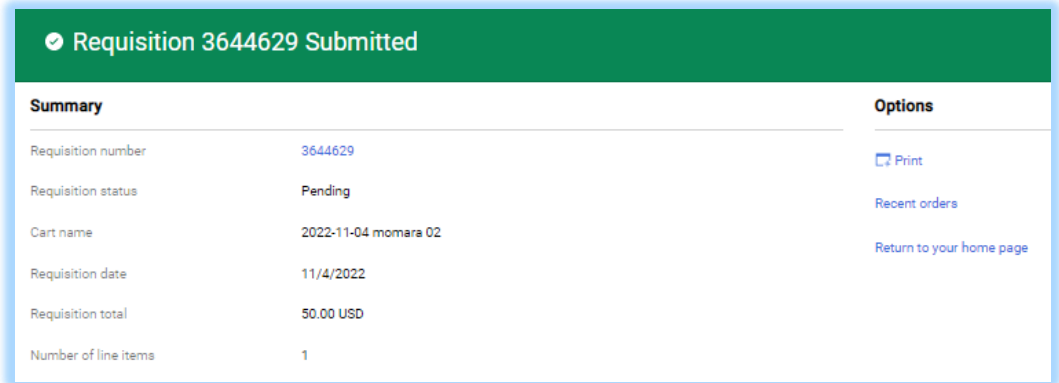
Once all edits have been completed, click on **Order** located towards the upper right of the screen.



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

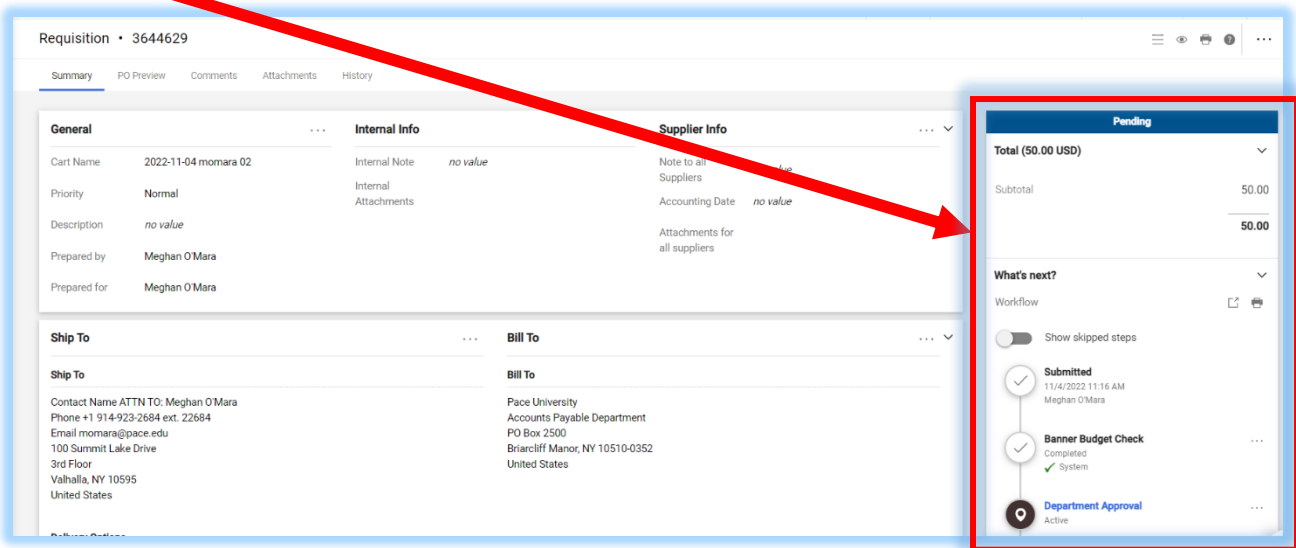
Viewing the Requisition Status and Details:

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



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.

The screenshot shows a requisition interface for requisition number 3644629. At the top, there are tabs for Summary, PO Preview, Comments, Attachments, and History. The History tab is selected and highlighted with a red box. Below the tabs, there are filter fields for Start date, End date, Requisition, and Document type. A table below shows the workflow steps:

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

An inset window titled "1 Item" is shown below the main interface. It displays "Staples - 1 Item - 165.00 USD" and a section for "SUPPLIER DETAILS". Within this section, the "PO Number" is listed as "30632005", which is highlighted with a red box. Below this, it shows "Pricing/Discount Code" as "no value". Red arrows point from the History tab in the main interface to the Summary tab in the inset, and from the Summary tab in the inset to the PO Number field.

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