**How to Requisition Non-Catalog Items**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select **Non-Catalog Request** from the menu bar.  
*Result:* The **Non-Catalog Request Page** displays. |
| 2    | Select the **Item Type** using the drop-down arrow. Then, complete the required fields indicated by an * (asterisk).  
- Select the supplier. Is this an existing supplier?  
- If yes, then click the flashlight to select the supplier  
- If no, then check the “New Supplier” box. Complete the supplier information.  
Click **Add to Cart**.  
*Note:* For EHS orders use the categories for the required **Category** field:  
- EHS Category = Lab.Radioisotopes  
*Result:* The **Dartmouth iProcurement Page** displays. |
| 3    | Are there any freight charges for this order?  
- If yes, AND an exact amount for the freight charge is provided, then go to Step 4.  
- If no, then go to Step 5. |
| 4    | Enter the freight charge as a separate line on the requisition.  
- Select “Goods and Services” billed by amount for the **Item Type**.  
- Enter freight charges in the “Item Description” field.  
- Select “Shipping and Handling Freight” Category.  
- Enter quantity.  
- Currency should be USD.  
- Select the supplier.  
Click **Add to Cart**. |
| 5    | Are you ready to check out?  
- If yes, then click View Cart and Checkout. Then, go to the section: **How to Check Out**  
- If no, then click the **Shop** tab from the menu bar to continue shopping. |

**How to Check Out**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | On the **Checkout: Requisition Information Page**:  
- Enter a meaningful description in the “Requisition Description” field.  
- Enter yes or no in the Confirming Order box.  
- Enter yes or no in the Capital Expense box.  
- If the person entering the request is different than the actual requester, then enter the actual requester’s name in the “Requester” field.  
- Enter the buyer’s name in the “Suggested Buyer” field (or search for the buyer by using the flashlight). |
| 2    | Has the chart string or PTAEO been set up as a default and is it correct?  
- If yes, then go to Step 3.  
- If no, or the default value does not apply to all requisition lines, then:  
  - Click the **Edit Lines** button (see previous page) to display **Edit Lines Page**.  
  - Update the missing or incorrect information for each line.  
  - Click **Return** to go back to **Checkout: Requisition Information Page**.  
*Note:* The GL Date must be the current or future date.  
*Result:* The **Checkout: Requisition Information Page** displays  
****Do Not use the GL equivalent for the PTAEO.**** |
| 3    | Do you need to add a note to the buyer?  
- If yes, then click **Next**. Then, go to Step 4  
- If no, then click **Submit**. You will receive a confirmation message with a Requisition Number (shown below). Then, go to Step 5. |
### How to Check Out, cont’d

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>On the <strong>Checkout: Review Approver List Page</strong>. . .</td>
</tr>
<tr>
<td></td>
<td><strong>IF you want to. . .</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Add a note to the buyer</strong></td>
</tr>
</tbody>
</table>
| 5    | **Do you want to review your requisition before you submit?**  
|      | • If yes, then click **Next**. Then, go to Step 6.  
|      | • If no, then click **Submit**. Then, go to Step 7. |
| 6    | **Review your request on the **Checkout: Review and Submit Requisition Page**. Then, click **Submit**.  
|      | **Note:** Here you can also “Save” or obtain a “Printable Page” of your request.  
|      | **Result:** The **Confirmation Page** displays. |
| 7    | **Write down your requisition number. Then, click on one of the following options:**  
|      | • Continue Shopping,  
|      | • Requisitions Tab (to review “My Requisitions”), or  
|      | • Logout |

### How to Requisition in a SciQuest “Punchout” Catalog

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select **SciQuest Marketplace** from the Dartmouth iProcurement Page.  
|      | **Result:** The **SciQuest Marketplace site** displays. |
| 2    | Select a “Punchout” catalog icon, such as Office Max.  
|      | **Result:** The selected catalog displays.  
|      | **Note:** Some external sites will require you to set up a profile. |
| 3    | **Select and add items to your shopping cart.**  
|      | Press **Checkout** when you have finished shopping.  
|      | **Result:** The **iProcurement Active Cart** displays. |
| 4    | **Review and click **Return to iProcurement**.  
|      | **Result:** The **Shopping Cart Page** displays all of the items you have selected (will display both internal & external catalog items). |
| 5    | **Click **Checkout**. Then, go to the section: **How to Check Out**.  
|      | **Result:** The **Checkout: Requisition Information Page** displays. |
### How to Requisition in a SciQuest “Hosted” Catalog

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select **SciQuest Marketplace** from the Dartmouth iProcurement Page.  
*Result:* The SciQuest Marketplace site displays. |
| 2    | Select **Browse by Supplier** to obtain the external hosted supplier list.  
*Note:* You can also use **Browse by Category** or select “All” by clicking on more...  
*Result:* The external hosted supplier list displays. |
| 3    | Select a **Supplier**.  
*Result:* The chosen supplier’s catalog of items display. |
| 4    | Select the category for your item.  
- Click on the + sign to drill down, then click on the item you need. |
| 5    | Place your order.  
- Check the Select box for the item you want.  
- Adjust the Quantity (if necessary).  
- Select **Add to Active Cart** from the drop-down menu. Then, click Go.  
- Click the Carts tab to review your selection and to return to iProcurement.  
*Result:* The Edit Cart Page displays. |
| 6    | Review and click **Return to iProcurement**.  
*Result:* The iProcurement Shopping Cart Page displays for review and checkout. |
| 7    | Click **Checkout**. Then go to the section: **How to Check Out**.  
*Result:* The Checkout: Requisition Information Page displays. |

### APPROVING

#### The Approval Chain

<table>
<thead>
<tr>
<th>If your $ threshold is...</th>
<th>Then, the requisition is routed to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>Level 2</td>
</tr>
<tr>
<td>$0.01 to $2,499</td>
<td>&lt;Self-approval – Level 1&gt;</td>
</tr>
<tr>
<td>$2,500 to $49,000</td>
<td>Level 3</td>
</tr>
<tr>
<td>$50,000 to $99,999</td>
<td>Level 4</td>
</tr>
<tr>
<td>$100,000 to $249,999</td>
<td>Level 5</td>
</tr>
<tr>
<td>&gt; $250,000</td>
<td>Level 6</td>
</tr>
</tbody>
</table>

### How to Approve a Requisition

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Access the “My Notification” section from the Dartmouth iProcurement Page.  
- Select the requisition by clicking on its Subject.*  
- Select the **Requisitions** tab to search and select additional requisitions or notifications.  
*Five most current requisitions or notifications display.  
*Result:* The Purchase Requisition Screen displays. |
| 2    | Click **View Requisition Details**. Do you need to make any changes to the requisition?  
- If yes, then click **Edit Requisitions** and follow the same steps listed in **How to Checkout**.  
- If no, then click **OK** and go to Step 3.  
*Result:* The Requisition Details Screen displays. |
| 3    | Determine what you want to do with the requisition.  
**IF you want to...**  
- **Approve**  
  Click **Approve**  
  **Go to:** Step 5  
- **Approve but forward notification to someone else**  
  Enter “Forward To” name and a note.  
  Click **Approve and Forward**  
  **Go to:** Step 5  
- **Forward the requisition to someone else for their review, before you approve it**  
  Enter “Forward To Name” and a note.  
  Click **Forward**.  
  **Go to:** Step 5  
- **Reject the requisition**  
  Click **Reject**.  
  **Go to:** Step 5  
- **Delegate your response to another person, or to give another person complete ownership of a requisition**  
  **Go to:** Step 4  
- **Get additional information about the requisition or item(s)**  
  Click **Request Information**.  
  **Go to:** Step 4 |
### How to Approve a Requisition, cont’d

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4    | Complete the information on the screen associated with the Reassign or Request Information options you selected in Step 3.  
  - Click **Submit**.  
  - Go to Step 5.  
  **Note:** For the Reassign option you will need to choose one of the following:  
  - **Delegate your response** – give another user authority to respond to a notification on your behalf, while still retaining ownership.  
  - **Transfer notification ownership** – give another user complete ownership of, and responsibility for, that requisition and approval. |
| 5    | Review the items listed under the Subject section of the Worklist Screen. Are there other requisitions that you need to review and approve?  
  - If yes, then click in the “Select” box for the requisition listed under the Subject column. Click on the **Open** button and repeat this procedure from Step 2.  
  - If no, then go to Step 6. |
| 6    | Are you ready to log out from the Worklist Screen  
  - If yes, then click **Logout**.  
  - If no, then choose from these tabs:  
    - Shop  
    - Requisitions  
    - Receiving |

### REQUISITIONING

### How to Requisition in the Dartmouth Main Store

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Select **Dartmouth Main Store** from the Search drop-down menu.  
  - Enter the item you are looking for in the blank field. For example if you are looking for Services type %Services% in the Search Dartmouth Main Store box.  
  - Click **Go**  
  **Result:** The Search Results Summary Screen displays. |
| 2    | After you have located the item, enter the quantity. |
| 3    | Click the **Add to Cart** button next to your item. |
| 4    | Are you ready to check out?  
  - If yes, then click **View Cart and Checkout**. Then, go to the Checking Out section.  
  If no, then click on the **Shop** tab from the menu bar to continue shopping. |
## GETTING STARTED

### How to Log On

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Log on to the Oracle Login Page using the URL provided by your instructor:  
  For Training:  
  For Production:  
  **Note:** The URL for accessing iProcurement between the system development and production phases may change. Check this website for the latest URL: [http://www.dartmouth.edu/~control/training/eproctrain.html](http://www.dartmouth.edu/~control/training/eproctrain.html) |
| 2    | Enter your Oracle username and password. Then click **Logon**.  
  **Result:** Oracle's Navigate window displays.  
  **Note:** If Security or Certificate windows display, click **OK**. |
| 3    | Click on **DC eProcurement**.  
  **Result:** The iProcurement Home Page link displays. |
| 4    | Click on the **iProcurement Home Page** link.  
  **Result:** The Dartmouth iProcurement Home Page displays. |

### How to Set Up iProcurement Preferences

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Access the Dartmouth iProcurement Home Page.  
  • Select **Preferences** from the Toolbar.  
  • Then, select **iProcurement Preferences**. |
| 2    | Enter your preferences:  
  • Delivery information  
  • PTAEO in the “Billing” section (Only if you want it to override any chart strings listed.)  
  • Chart strings in the “Charge Accounts” section.  
  • Click **Apply Changes**. |

## RECEIVING

### How to Receive in iProcurement

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click the **Receiving** Tab on the Dartmouth iProcurement Page. Is the requisition displayed in the “My Requisitions” section?  
  • If yes, then click the **Express Receive** icon (if available). Then go to Step 5.  
  • If no, then click on **Receive Items** to search and select your requisition. Then, go to Step 2.  
  **Note:** Only the five most current requisitions or notifications are displayed. Select the **Requisitions** tab to search and select additional requisitions or notifications. |
| 2    | Enter the Requisition Number or Purchase Order Number in the **Requisition Number** field. Then, click **Go** to search for a specific requisition.  
  **Result:** The Receive Items: Select Items Screen displays. |
| 3    | Click the **Select** box for the Requisition(s) you wish to receive, then:  
  • Enter the Quantity you wish to receive.  
  • Click **Next**.  
  **Result:** The Receive Items: Enter Receipt Information Screen displays. |
| 4    | Enter the **Receipt Information**. Then, click **Next**.  
  **Note:** Although this step is optional, it is wise to enter this information so that there is a permanent record and so that anyone communicating with the supplier can refer to this information.  
  **Result:** The Receive Items: Review and Submit Screen displays. |
| 5    | Review the item(s). Then, click **Submit**.  
  **Result:** The Receive Items: Confirmation Details Screen displays. |
| 6    | Click **Logout** if you are done.  
  **Note:** If you want to complete another task, you may choose from these tabs:  
  • Shop  
  • Requisitions  
  • Receiving |
3 Then log out and log back in to have the changes take.
eProcurement Environment at Dartmouth College

Blanket agreements and internal catalogs

Dartmouth Main Store

Source Description

Dartmouth Main Store

"Internal" catalogs loaded into iProcurement as blanket agreements or quotations (not accessed via SciQuest) for most commonly purchased goods and services.

SciQuest Marketplace


Non-Catalog Requests

Orders placed with vendors or service providers who do not have catalogs in the Dartmouth Exchange. For example, non-sourced orders and/or services such as microscopes or consulting services.

Dartmouth Internal Stockrooms

Pathway to internal inventories available in our stockrooms, such as Central Stores, Borwell, etc.

P-Cards

Use of P-Cards will continue and should be used for items such as cell phones, copiers, bottled water, coffee delivery, etc.

external catalogs hosted by the SciQuest marketplace vendor

Dartmouth Exchange

eProcurement

Non-Catalog

Requests

Dartmouth's own internal stockrooms, such as Central Stores, Borwell Stockroom, etc.

P-CARD

Small dollar, recurring orders such as advertisement, bottled water, cell phones, coffee delivery, etc.

P-CARD

P-CARD

P-CARD

P-CARD

P-CARD

P-CARD

eProcurement

Updated August 2009

Job Aid

<table>
<thead>
<tr>
<th>Topic</th>
<th>See Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Started: How to Log On, How to Set Up iProcurement Preferences</td>
<td>2</td>
</tr>
<tr>
<td>Requisitioning: How to Requisition in the Dartmouth Main Store</td>
<td>3</td>
</tr>
<tr>
<td>How to Requisition in a SciQuest &quot;Hosted&quot; Catalog</td>
<td>4</td>
</tr>
<tr>
<td>How to Requisition in a SciQuest &quot;Punchout&quot; Catalog</td>
<td>5</td>
</tr>
<tr>
<td>How to Requisition Non-Catalog Items</td>
<td>6</td>
</tr>
<tr>
<td>How to Check Out</td>
<td>7-8</td>
</tr>
<tr>
<td>Approving: The Approval Chain, How to Approve a Requisition</td>
<td>9-10</td>
</tr>
<tr>
<td>Receiving: How to Receive in iProcurement</td>
<td>11</td>
</tr>
<tr>
<td>Overview of eProcurement Environment at Dartmouth College</td>
<td>12</td>
</tr>
</tbody>
</table>

To locate URLs for tools and templates in the training environment (and eventually the production environment), please visit:

http://www.dartmouth.edu/~control/training/eproctrain.html

©Copyright 2009 Dartmouth College. All rights reserved