

How to Requisition Non-Catalog Items

Step	Action
1	Select Non-Catalog Request from the menu bar. <i>Result:</i> 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). <ul style="list-style-type: none"> 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 . <i>Note:</i> For EHS orders use the categories for the required Category field: <ul style="list-style-type: none"> EHS Category = Lab.Radioisotopes <i>Result:</i> The Dartmouth iProcurement Page displays.
3	Are there any freight charges for this order? <ul style="list-style-type: none"> 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. <ul style="list-style-type: none"> 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? <ul style="list-style-type: none"> If yes, then click View Cart and Checkout. Then, go to the section: <i>How to Check Out</i> If no, then click the Shop tab from the menu bar to continue shopping.

How to Check Out

Step	Action								
1	On the Checkout: Requisition Information Page : <ul style="list-style-type: none"> 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). <table border="1"> <thead> <tr> <th>If you. . .</th> <th>Then. . .</th> </tr> </thead> <tbody> <tr> <td>Set up your PTAE0 in Preferences</td> <td>PTAE0 will default in and will default for each line item</td> </tr> <tr> <td>Set up your chart strings in Preferences</td> <td>Primary” chart string defaults for each line</td> </tr> <tr> <td>Did <u>not</u> set up a PTAE0 or a chart string</td> <td>You can manually add (or change) the PTAE0 or chart string for each line item</td> </tr> </tbody> </table>	If you. . .	Then. . .	Set up your PTAE0 in Preferences	PTAE0 will default in and will default for each line item	Set up your chart strings in Preferences	Primary” chart string defaults for each line	Did <u>not</u> set up a PTAE0 or a chart string	You can manually add (or change) the PTAE0 or chart string for each line item
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2	Has the chart string or PTAE0 been set up as a default and is it correct? <ul style="list-style-type: none"> If yes, then go to Step 3. If no, or the default value does not apply to all requisition lines, then: <ul style="list-style-type: none"> 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. <i>Note:</i> The GL Date must be the current or future date. <i>Result:</i> The Checkout: Requisition Information Page displays ***** Do Not use the GL equivalent for the PTAE0.								
3	Do you need to add a note to the buyer? <ul style="list-style-type: none"> 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

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4	<p>On the <u>Checkout: Review Approver List Page</u>. . .</p> <table border="1"> <thead> <tr> <th>IF you want to. . .</th> <th>THEN. . .</th> </tr> </thead> <tbody> <tr> <td>Add a note to the buyer</td> <td>Type a note in the "Note to Buyer" field if you are utilizing a new supplier, order needs to be faxed or email to the supplier, or if other pertinent information needs to be relayed to the Buyer for appropriate processing.</td> </tr> </tbody> </table>	IF you want to. . .	THEN. . .	Add a note to the buyer	Type a note in the "Note to Buyer" field if you are utilizing a new supplier, order needs to be faxed or email to the supplier, or if other pertinent information needs to be relayed to the Buyer for appropriate processing.
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5	<p>Do you want to review your requisition before you submit?</p> <ul style="list-style-type: none"> • If yes, then click Next. Then, go to Step 6. • If no, then click Submit. Then, go to Step 7. 				
6	<p>Review your request on the <u>Checkout: Review and Submit Requisition Page</u>. Then, click Submit.</p> <p><u>Note:</u> Here you can also "Save" or obtain a "Printable Page" of your request.</p> <p><u>Result:</u> The <u>Confirmation Page</u> displays.</p>				
7	<p>Write down your requisition number. Then, click on one of the following options:</p> <ul style="list-style-type: none"> • Continue Shopping, • Requisitions Tab (to review "My Requisitions"), or • Logout 				

How to Requisition in a SciQuest "Punchout" Catalog

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

How to Requisition in a SciQuest “Hosted” Catalog

Step	Action
1	Select SciQuest Marketplace from the Dartmouth iProcurement Page . <i>Result:</i> The SciQuest Marketplace site displays.
2	Select Browse by Supplier to obtain the external hosted supplier list. <i>Note:</i> You can also use Browse by Category or select “All” by clicking on more. . . <i>Result:</i> The external hosted supplier list displays.
3	Select a Supplier . <i>Result:</i> The chosen supplier’s catalog of items display.
4	Select the category for your item. <ul style="list-style-type: none"> Click on the + sign to drill down, then click on the item you need.
5	Place your order. <ul style="list-style-type: none"> 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. <i>Result:</i> The Edit Cart Page displays.
6	Review and click Return to iProcurement . <i>Result:</i> The iProcurement Shopping Cart Page displays for review and checkout.
7	Click Checkout . Then go to the section: <i>How to Check Out</i> . <i>Result:</i> The Checkout: Requisition Information Page displays.

APPROVING

The Approval Chain

IF your \$ threshold is. . .	THEN, the requisition is routed to. . .
\$0	Level 2
\$.01 to \$2,499	<Self-approval – Level 1>
\$2,500 to \$49,000	Level 3
\$50,000 to \$99,999	Level 4
\$100,000 to \$249,999	Level 5
> \$250,000	Level 6

How to Approve a Requisition

Step	Action																					
1	Access the “My Notification” section from the Dartmouth iProcurement Page . <ul style="list-style-type: none"> Select the requisition by clicking on its Subject.* Select the Requisitions tab to search and select additional requisitions or notifications. <i>*Five most current requisitions or notifications display.</i> <i>Result:</i> The Purchase Requisition Screen displays.																					
2	Click View Requisition Details . Do you need to make any changes to the requisition? <ul style="list-style-type: none"> If yes, then click Edit Requisitions and follow the same steps listed in <i>How to Checkout</i>. If no, then click OK and go to Step 3. <i>Result:</i> The Requisition Details Screen displays.																					
3	Determine what you want to do with the requisition. <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>IF you want to...</th> <th>THEN...</th> <th>Go to...</th> </tr> </thead> <tbody> <tr> <td>Approve</td> <td>Click Approve</td> <td>Step 5</td> </tr> <tr> <td>Approve but forward notification to someone else</td> <td>Enter “Forward To” name and a note. Click Approve and Forward</td> <td>Step 5</td> </tr> <tr> <td>Forward the requisition to someone else for their review, before you approve it</td> <td>Enter “Forward To Name” and a note. Click Forward.</td> <td>Step 5</td> </tr> <tr> <td>Reject the requisition</td> <td>Click Reject.</td> <td>Step 5</td> </tr> <tr> <td>Delegate your response to another person, or to give another person complete ownership of a requisition</td> <td>Click Reassign.</td> <td>Step 4</td> </tr> <tr> <td>Get additional information about the requisition or item(s)</td> <td>Click Request Information.</td> <td>Step 4</td> </tr> </tbody> </table>	IF you want to...	THEN...	Go to...	Approve	Click Approve	Step 5	Approve but forward notification to someone else	Enter “Forward To” name and a note. Click Approve and Forward	Step 5	Forward the requisition to someone else for their review, before you approve it	Enter “Forward To Name” and a note. Click Forward .	Step 5	Reject the requisition	Click Reject .	Step 5	Delegate your response to another person, or to give another person complete ownership of a requisition	Click Reassign .	Step 4	Get additional information about the requisition or item(s)	Click Request Information .	Step 4
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How to Approve a Requisition, cont'd

Step	Action
4	<p>Complete the information on the screen associated with the Reassign or Request Information options you selected in Step 3.</p> <ul style="list-style-type: none"> • Click Submit. • Go to Step 5. <p><u>Note:</u> For the Reassign option you will need to choose one of the following:</p> <ul style="list-style-type: none"> • 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	<p>Review the items listed under the Subject section of the <u>Worklist Screen</u>. Are there other requisitions that you need to review and approve?</p> <ul style="list-style-type: none"> • 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	<p>Are you ready to log out from the <u>Worklist Screen</u></p> <ul style="list-style-type: none"> • If yes, then click Logout. • If no, then choose from these tabs: <ul style="list-style-type: none"> - Shop - Requisitions - Receiving

REQUISITIONING

How to Requisition in the Dartmouth Main Store

Step	Action
1	<p>Select Dartmouth Main Store from the Search drop-down menu.</p> <ul style="list-style-type: none"> • 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 <p><u>Result:</u> The <u>Search Results Summary Screen</u> displays.</p>
2	<p>After you have located the item, enter the quantity.</p>
3	<p>Click the Add to Cart button next to your item.</p>
4	<p>Are you ready to check out?</p> <ul style="list-style-type: none"> • If yes, then click View Cart and Checkout. Then, go to the Checking Out section. <p>If no, then click on the Shop tab from the menu bar to continue shopping.</p>

GETTING STARTED

How to Log On

Step	Action
1	<p>Log on to the Oracle Login Page using the URL provided by your instructor:</p> <p>For Training:</p> <p>For Production:</p> <p>Note: The URL for accessing iProcurement between the system development and production phases may change. Check this website for the latest URL: https://www.dartmouth.edu/~fiscalservices/</p>
2	<p>Enter your Oracle username and password. Then click Logon.</p> <p>Result: Oracle's <u>Navigate</u> window displays.</p> <p>Note: If <u>Security</u> or <u>Certificate</u> windows display, click OK.</p>
3	<p>Click on DC eProcurement.</p> <p>Result: The <u>iProcurement Home Page</u> link displays.</p>
4	<p>Click on the iProcurement Home Page link.</p> <p>Result: The <u>Dartmouth iProcurement Home Page</u> displays.</p>

How to Set Up iProcurement Preferences

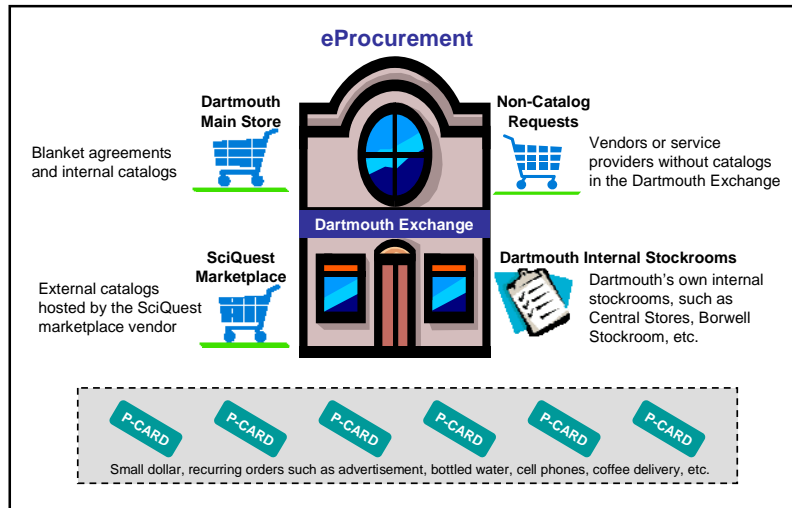
Step	Action
1	<p>Access the <u>Dartmouth iProcurement Home Page</u>.</p> <ul style="list-style-type: none"> • Select Preferences from the Toolbar. • Then, select iProcurement Preferences.
2	<p>Enter your preferences:</p> <ul style="list-style-type: none"> • Delivery information • PTAE0 in the "Billing" section (Only if you want it to override any chart strings listed.) • Chart strings in the "Charge Accounts" section. • Click Apply Changes.
3	<p>Then log out and log back in to have the changes take.</p>

RECEIVING

How to Receive in iProcurement

Step	Action
1	<p>Click the Receiving Tab on the <u>Dartmouth iProcurement Page</u>. Is the requisition displayed in the "My Requisitions" section?</p> <ul style="list-style-type: none"> • 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. <p>Note: Only the five most current requisitions or notifications are displayed. Select the Requisitions tab to search and select additional requisitions or notifications.</p>
2	<p>Enter the Requisition Number or Purchase Order Number in the Requisition Number field. Then, click Go to search for a specific requisition.</p> <p>Result: <u>The Receive Items: Select Items Screen</u> displays.</p>
3	<p>Click the Select box for the Requisition(s) you wish to receive, then:</p> <ul style="list-style-type: none"> • Enter the Quantity you wish to receive. • Click Next. <p>Result: <u>The Receive Items: Enter Receipt Information Screen</u> displays.</p>
4	<p>Enter the Receipt Information. Then, click Next.</p> <p>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.</p> <p>Result: <u>The Receive Items: Review and Submit Screen</u> displays.</p>
5	<p>Review the item(s). Then, click Submit.</p> <p>Result: <u>The Receive Items: Confirmation Details Screen</u> displays.</p>
6	<p>Click Logout if you are done.</p> <p>Note: If you want to complete another task, you may choose from these tabs:</p> <ul style="list-style-type: none"> • Shop • Requisitions • Receiving

eProcurement Environment at Dartmouth College



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	"External" catalogs for approved suppliers NOT loaded as an internal catalog. Hosted: Access to SciQuest-hosted supplier catalogs. Punchout: SciQuest Links to preferred vendor sites who host their own catalogs.
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.

**eProcurement
Updated August 2009**

Job Aid

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

<https://www.dartmouth.edu/~fiscalservices/>