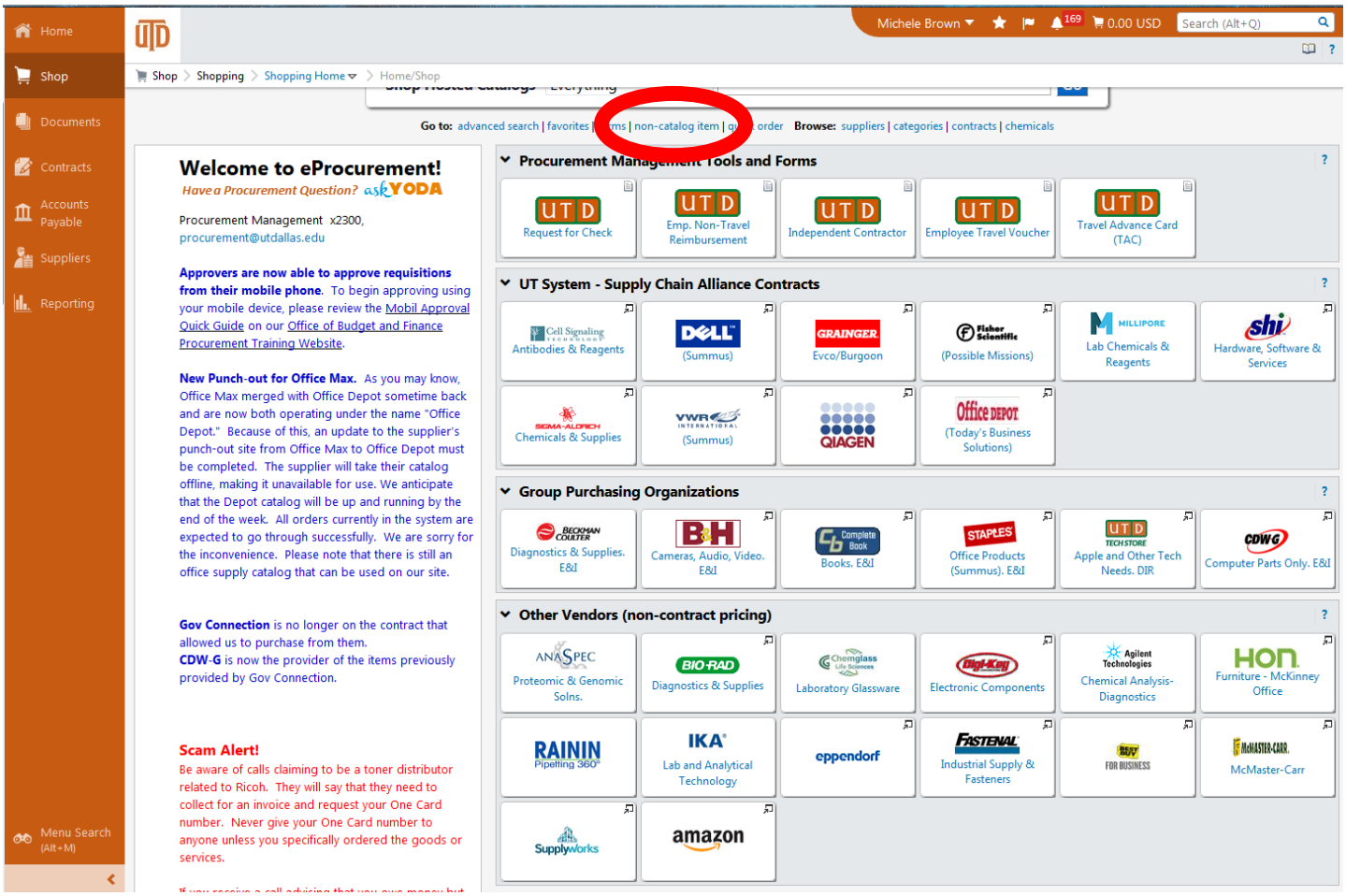
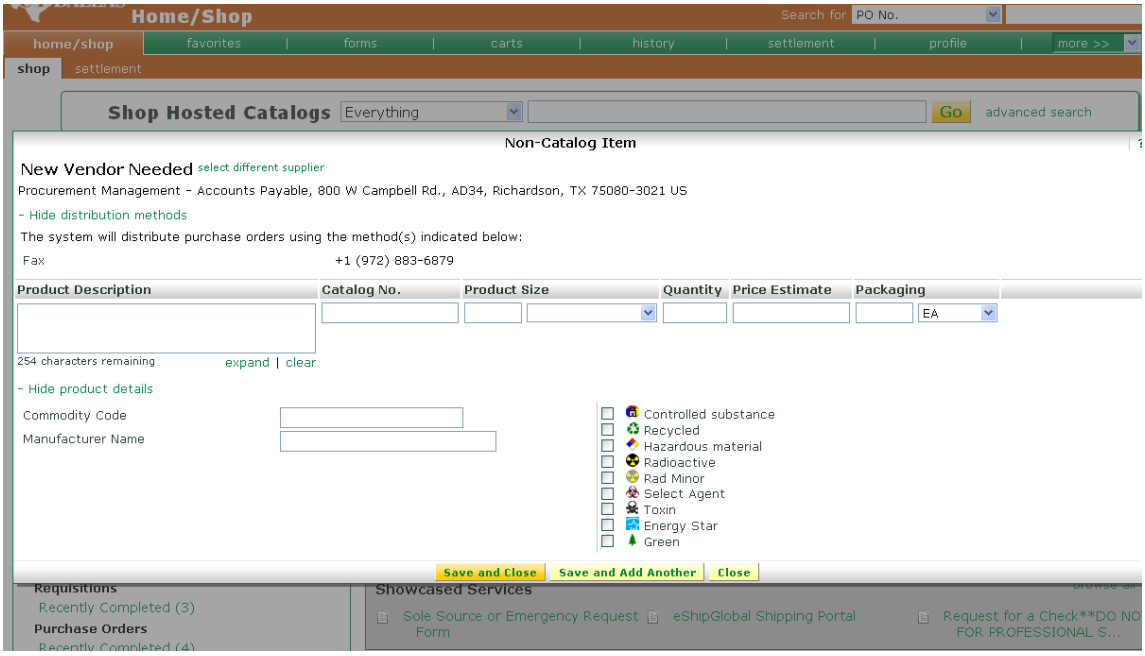
Ordering using a Listed Vendor or New Unlisted Vendor:

- Search for the supplier under "*Browse: Supplier*":
  - If the supplier is listed, click on the supplier to select
  - If the supplier is not listed, then email Michele to have the supplier added to EProcurement.

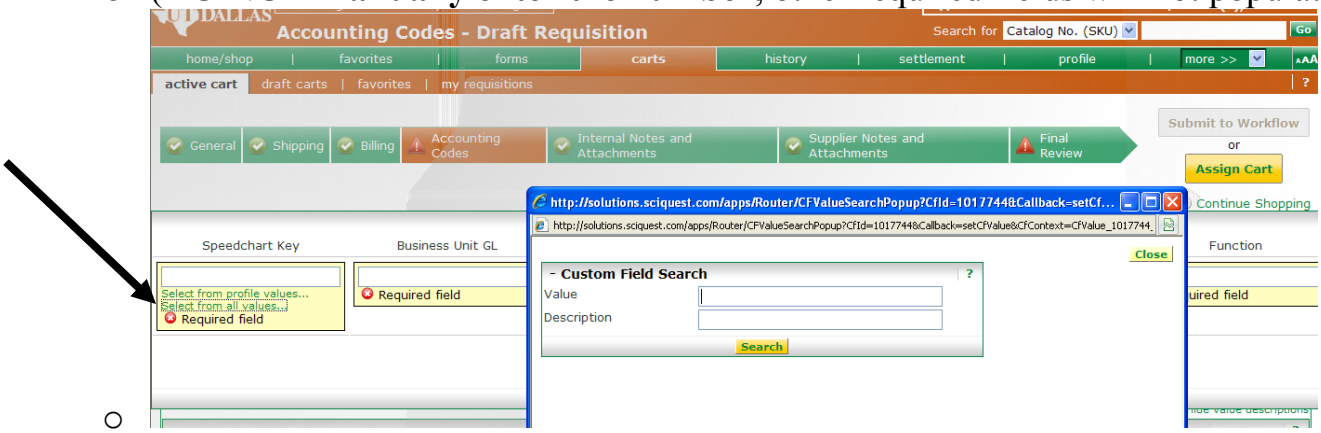


- All suppliers who are not on the punch out page (main Procurement page), are REQUIRED to have a quote or a price list attached to the order. All orders without a quote or price list will be returned to the shopper.
- Click "*Add Non-Catalog Item*"



- Enter information for the item
  - Provide item description
  - Provide catalog number (if available)
  - Quantity
  - Price (**Do Not enter $**. Enter only the dollar amount, not the symbol)
  - "Packaging" will be "1"
- Click "*Save and Close*" or "*Save and add another item*"
- Make sure <u>each line</u> of the quote/price list has it's own line in the order. This includes shipping charges.
- Click on your cart, located on the top right corner of the main screen page
- If done ordering items, then click "*Proceed to Checkout*"

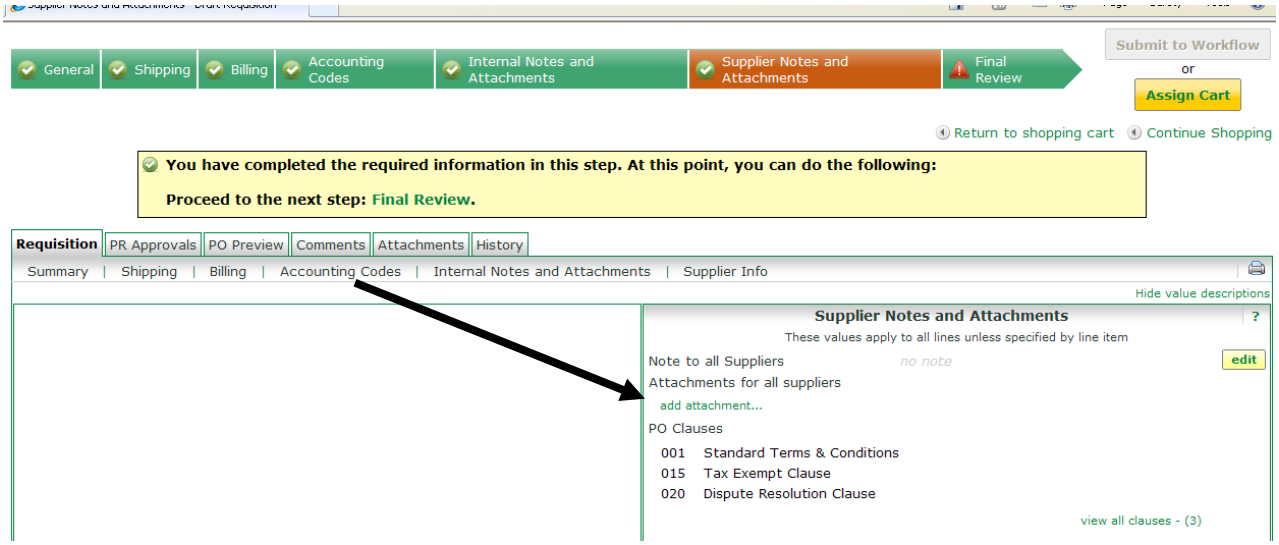
Adding a Cost Center:

- Click on the green link on the far left that says "*Speedchart key: Required field*"
- Click on the green link called "*Select from all values*"
  - (**DO NOT manually enter the number**, other required fields will not populate)
  - 

- Enter in the cost center number provided by your sponsor
    - Exception: If your sponsor wants you to use "*Startup*" funds, please enter that information under "*Comments*"
- Click "*search*"
- Click "*select*" (notice other funds will populate)
- In the "Account box", enter in the account number (ex: 63001, 63302)
- Click "*Save*" (scroll over to the right to find the save button)

To Add a quote or other attachment:

- Click the tab that is called "***Supplier*** *Notes and Attachments*"



    - Click the link that says "*add attachment*"
    - Upload the Quote/Price List.
        - Note: Quotes are your friend, please request a quote from the company for all companies that are not a punch out vendor.

- Click the tab that is called "*Internal Notes and Attachments*" and attach the quote.
- Then put in a justification for the order. This is required for all orders.

REMEMBER: For a new vendor - Do not send the order through without confirming the vendor is active.

- Click "*Final Review*"
- Click "*Assign cart*"
    - Click "*search for an assignee*"
    - Enter in "Michele" "Brown", then "search"

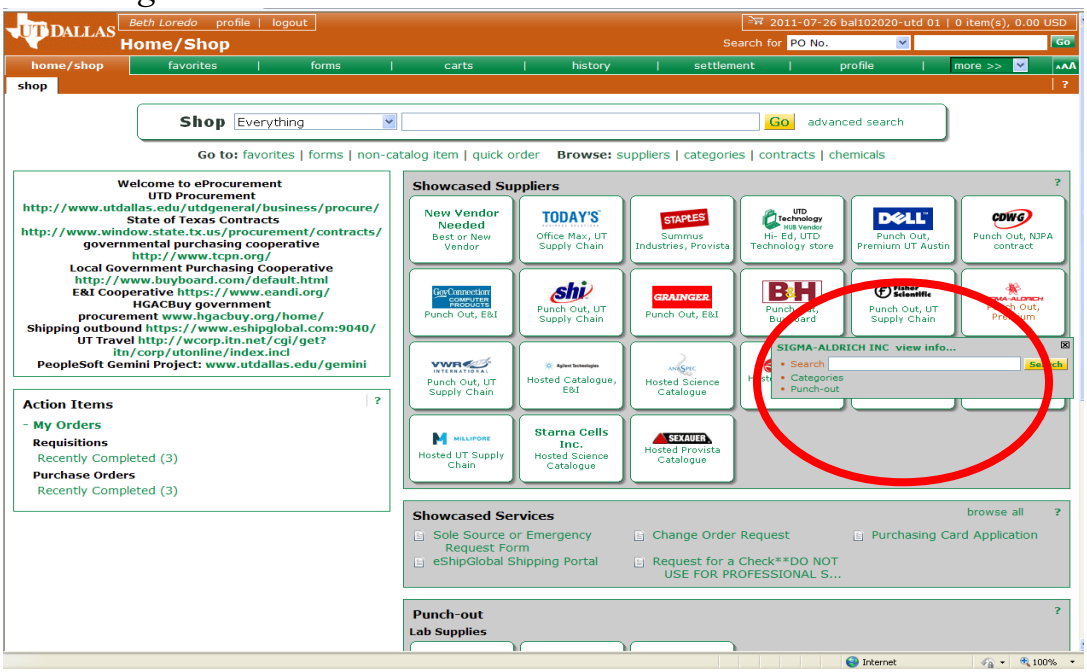
- Click select dot, then "*choose selected user*"
- Click "*add to profile*" (this will save her as the default contact)
- Click "*Assign*"

- The order has been submitted to the workflow

Ordering from a Punch-out Vendor (ex: Sigma Aldrich)

Punch-out vendors are listed on the first page of the website. Each punch-out vendor will have a "button" with their name. When you access one of the punch-out vendors, you will be taken to the vendor's webpage. You shop on the page, add your items to the cart, and when you go to "check-out" you will be returned to the UT Dallas e-procurement site.

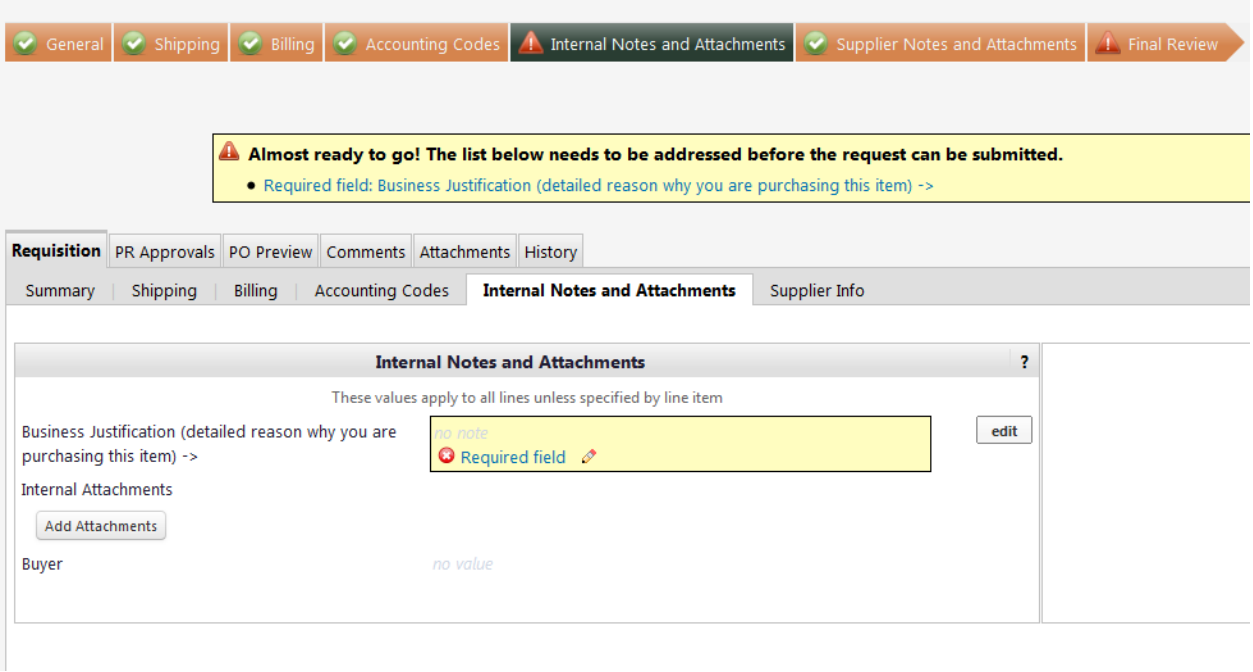
- Click "*Sigma-Aldrich Punch Out*"



- Order items, and submit order in the Sigma-Aldrich website
- This will return you to SciQuest. Then follow the instructions as mentioned earlier

Business Justification Field:

- This is a statement that shows the intent of the expenditures and how it relates to the funding source charged. The Purchaser is required to provide the University with business justification for goods and services. *Example: Lab supplies for Dr. Doe's research in protein analysis*



To check the status of your orders:

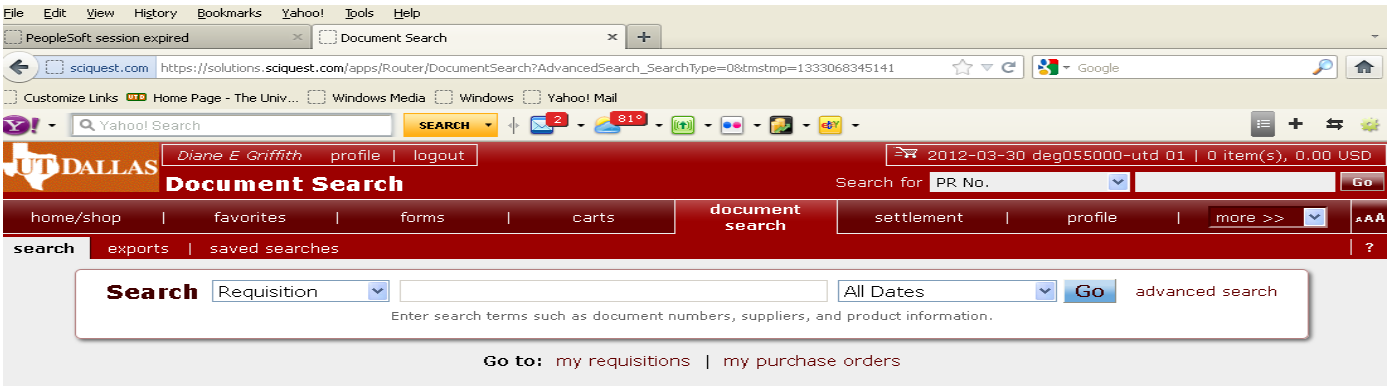
- If you have not assigned your order to Michele, it will be in your "active cart"
- If you have assigned your order to Michele, but it is not submitted, it will be in your "draft cart"

If you have assigned the order and it has been submitted, there are two ways to locate it:

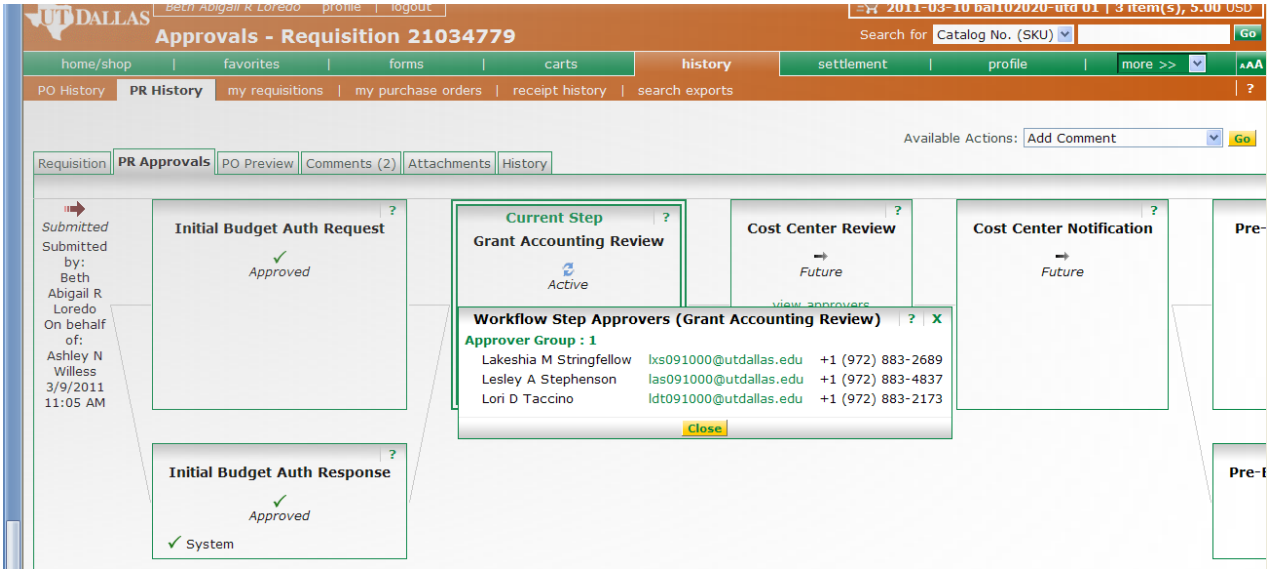
At the top right on the screen, there is a drop-down menu box entitled "Search for". The drop-down menu allows you to search using one of several criteria. Once you have entered the appropriate information click the "go" button. This will bring up a copy of your purchase requisition.

Alternatively, you can use the "Document search" tab. The "Document search" tab is located near the top of the screen in the middle.

Click the document search tab, this will bring you to a screen with a drop-down menu which allows you to search by requisition number, purchase order, invoice or receipt. Once you have entered your information, Click the "Go" button. Click the appropriate Requisition number.



- To check the progress of your order:
    - Click the tab "*PR Approvals*"
    - Below is an example of workflow to see who is holding on to the order. To see who to contact, click "view approvers"



Miscellaneous tips:

1) Resubmitting any Order:

- Select the Requisition that you want to resubmit
- On the right side, under "Available Actions", select "*Copy to New Cart"*
- Everything will be copied to a new cart, except the cost center and account number
- **Important** – if your original cart was from a "punch-out" vendor, you will need to re-enter the items you wish to purchase – items from a punch-out vendor will *not* properly copy from one cart to another.

2) If after a reasonable amount of time, an order you placed has not arrived, you may call the vendor (reference the PO number) to see if they have received and processed the order. If they have not received the order please let us know, so we can get in touch with Procurement and have the order resent.