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Internet Procurement Application User Manual

This manual has been prepared for users of the RIAS Internet Procurement application. The Internet Procurement application is the end-user component in the RIAS Procure-to-Pay Process. The application is used to create Quick, Regular and certain Internal purchase requisitions as well as check requests.

This manual will help users:

- Understand the University's Procure-to-Pay Process
- Understand how to log on and log off from the Internet Procurement application
- Understand the following Internet Procurement roles:
 - Requisition Approver
 - Requisition Preparer
 - Requisition Receiver
 - Requisition Requester
 - Requisition Reviewer
- Understand how to create a requisition online with catalog and/or non-catalog items
- Understand how to research requisition and purchase order information online
- Understand Approver Actions: Approve, Reject, Forward, Approve and Forward and Edit
- Understand the process to change purchase orders and commitments
- Understand how to enter receipts, returns and corrections against purchase orders
- Understand how Travel and Business Expense Reports (TABERs) and travel advances will be handled in Phase I of the RIAS Project
- Know where to go for assistance if necessary

When you use the Internet Procurement application, please remember that all purchases of goods and services must be in accordance with the policies and procedures contained in the University Regulations and Procedures Manual, the Faculty and Staff Buying Guide and the Standards for University Operations Handbook.

For additional purchasing related information, see the web site for University Procurement Services at: <http://www.rci.rutgers.edu/~procure>

New forms are available on the RIAS web site at <http://rias.rutgers.edu/formsrequirements.html> in both Adobe Acrobat and MSWord “fill-in” formats.

This manual is subject to revision, the most current version is available on the RIAS web site at: <http://www.rias.rutgers.edu>

Requisition and Purchase Order Overview

Requisition vs. Purchase Order?

- A **Requisition** is an internal electronic request for goods and services that is assigned a system-generated number during the requisition creation process. Requisition commitments will be displayed in OFIS as **R-XXXXXX** the following day upon submission.
- A **Purchase Order** is a legally binding document to a supplier for goods and services that provides the supplier with terms and conditions for goods to be received or services to be rendered. Purchase Orders are assigned a system-generated number upon approval. Purchase Order commitments will be displayed in OFIS as **P-XXXXXX** the following day upon approval.

Requisition Approval Hierarchy Key Concepts

- A Requisition Approval Hierarchy is a structure that defines the default automatic routing of requisitions from a Preparer to an Approver.
- All authorized individuals (e.g. Approver, Preparer, Requester, Reviewer, Receiver) must be specifically defined in the Requisition Approval Hierarchy.
- There are two levels of approval defined in the hierarchy. Level one is an optional level for approval authority for requisitions from \$0 to \$10,000 that an organization may have defined. Level two is for approval authority for requisitions from \$0 to a department's total budget.
- All Level two Approvers have been assigned one backup. Level two Approvers will serve as the Level 1 backup.
- An Approver will have the authority to approve all requisitions within an organization based upon the dollar limits defined in the level they are assigned to, regardless of funding source.
- One approval is required on each requisition.
- By default, all Approvers are Preparers. If an Approver creates his/her own requisition, it will be automatically routed to the next authorized Approver in the hierarchy. All Level two Approvers must manually change the default Approver to a "peer" Approver for approval. A listing of all authorized Approvers is available as a link in Internet Procurement.
- If an Approver has an expected absence (e.g. vacation), the Approver is expected to re-assign his/her requisitions to automatically route to a backup Approver for the specified time.
- If an Approver has an unexpected absence (e.g. sick) who has not re-assigned his/her requisitions, the Preparer will be sent a notification if the Approver has not taken an action after 3 days.

Basic Expectations for Approvers

Approval authority for requisitions should reside with regularly appointed employees (Type 1) whose job descriptions are formally designated as a business manager, accountant, an equivalent title or who have supervisory authority. These individuals typically have independent fiscal authority and are charged with administrative and financial functions that include budget approval and in many cases budget development. They are accountable for determining the appropriateness of expenditures, for monitoring and reporting of funds availability, and other related duties consistent with the following basic expectations that describe the role of Approvers:

- Appreciation and acceptance of the responsibility and accountability implicit in an Approver role;
- Working knowledge of basic accounting and budgeting concepts as well as familiarity with the University's accounting and budgeting systems and structures;
- Working knowledge of the purchasing guidelines issued by University Procurement & Contracting as well as familiarity with basic business concepts such as those defined in the Standards for University Operations Handbook;
- Willingness and ability to access, interpret and apply the policies and procedures contained in University Regulations and Procedures Manual;
- Willingness and ability to access, interpret and apply the regulations and procedures of externally sponsored programs;
- Willingness and ability to access and interpret budget, expenditure and commitment information through reports or online applications;
- Willingness and ability to exercise professional judgment and due diligence when determining if an expenditure is reasonable, appropriate and necessary (refer to separate statement on professional judgment and due diligence);
- Willingness and ability to assert the proper application of the University's policies and procedures;
- Willingness and ability to ensure expenditures remain within program or project budgets;
- Willingness to attend training programs designed for the use of the RIAS applications and other professional development activities sponsored by the University;
- Willingness and ability to learn and use desktop computing tools including web browsers, email, I-Procurement and word processing applications as well as maintain respect for system security measures and the confidentiality of certain types of information.

Units or departments, which do not have a position meeting these requirements, will establish a requisition hierarchy that routes purchase requisitions to the appropriate position with approval authority in their organization.

Professional Judgment and Due Diligence – Approver Role

The Approver is expected to exercise professional judgment and due diligence when determining if an expenditure is reasonable, appropriate and necessary.

Professional judgment means that the individual will make a determination based on the application of knowledge and understanding of facts and circumstances.

Due diligence means that the individual has the authority and responsibility to pursue knowledge, facts or both in order to make an informed decision. Due diligence may require consultation with superiors or other informed parties such as a principal investigator, the Office of Research and Sponsored Programs, the Division of Grant and Contract Accounting, University Procurement & Contracting, the Office of the University Controller and the Office of the University Counsel.

Reasonable means that cost of the goods or services is not excessive.

Appropriate means that the expenditure is consistent with objectives of the program, project or task. Appropriate also means that the expenditure is allowable under the terms and conditions of the underlying funding source and/or policies established by the University.

Necessary means that the expenditure is required to achieve the expected goals or outcomes of the program, project or task.

For example, it may be appropriate and necessary for an academic department to conduct a luncheon meeting to interview prospective faculty candidates because that is the only time during the day that all members of the search committee could be scheduled to attend. The cost of the luncheon, however, might be considered unreasonable if the cost were to exceed more than \$25 per person.

Basic Expectations for Preparers

The authority to prepare requisitions should be assigned to regularly appointed employees (Type 1 and 6) employees who are capable of performing at a level that will meet the following basic expectations:

- Willingness and ability to learn and use desktop computing tools including web browsers, email, and word processing applications as well as maintain respect for system security measures and the confidentiality of certain types of information;
- Willingness to attend training programs designed for the use of the RIAS applications and other professional development activities sponsored by the University;
- Willingness and ability to complete basic Oracle navigation and I-Procurement training;
- Working knowledge of University Procurement & Contracting policies and procedures;
- Willingness and ability to prepare requisitions in an accurate and complete manner. Preparers will be required to enter account numbers and organization identification numbers on requisitions before they can be submitted for approval. Preparers are also expected to document the reason for the request in the Notes to Approver section of the requisition as well as the name of the requestor, if not entered directly into the Requestor field.
- Willingness and ability to acknowledge the receipt of goods and services when assigned the default Requestor/Receiver role, and to initiate the return of goods or services if defective.

Student employees (Type 5) will not be granted authority to prepare requisitions or given access to the RIAS I-Procurement application. Also, casual employees (Type 4, 7 and 8) will not be granted authority to prepare requisitions unless the unit can document a compelling need that would justify the special set up and maintenance activities associated with the assignment.

Paper forms being replaced by the RIAS Procure-to-Pay Process

- 9 Part Requisition (“R” and “B”)
- 9 Part Requisition for Plant Funds (“C”)
- Quick Orders (“Q”)
- Check Requests (Billheads)
- Internal Purchase Orders (“I” or “D”) for purchases from:
 1. New Brunswick Computer Support Services - Rutgers Computer Store
 2. New Brunswick Computer Support Services – Rutgers Computer Repair
 3. New Brunswick Computer Support Services – Rutgers Computer Software
 4. Facilities Maintenance (Newark and Camden Campuses)
 5. Mail and Document Services
 6. Material Services
 7. Rutgers College – Student Center Space Reservations
 8. Administrative Computing Services-SecurID Card
 9. New Brunswick Dining Services – Catering
 10. Knight Express
- Invoice Certification Form for purchases over \$1,000 except for:
 1. New Blanket Orders
 2. Subcontracts (Sponsored Programs)
 3. Consulting, Professional Services and other Fixed Price Agreements
 4. Paper Purchase Orders converted into RIAS

The Procure-to-Pay Process

Overview

Purchasing Authority: University Procurement & Contracting has been given the authority to conduct and conclude negotiations for the purchase or lease of all supplies, equipment, and services to fulfill the requirements of the University. The department is responsible for procuring all goods and services fairly and competitively, and on an equitable basis, without undue delay, in accordance with the University's procurement policies. The authority for purchasing is delegated by the Board of Governors through the President to the Senior Vice President and Treasurer, who in turn, has assigned purchasing responsibility to the Executive Director of University Procurement Services, to the Director of University Procurement & Contracting and to the purchasing staff.

Operational Functions:

- A. To purchase, rent, or lease all goods and services that are required by university departments
- B. To maintain good relations with suppliers and procure all goods and services fairly and competitively, and on an equitable basis, without undue delay
- C. To comply with all policies and laws pertaining to the procurement of all supplies, equipment and services

The Procure-to-Pay Process:

- Step 1 Requisition Preparer creates requisition electronically
- Step 2 Requisition Preparer electronically submits requisition to the Requisition Approver
- Step 3 Requisition commitment is reflected on the Online Financial Information System (OFIS) the following day
- Step 4 Requisition Approver receives requisition electronically, reviews and takes the appropriate action (Approve, Reject, Forward, Approve and Forward or Edit)
- Step 5 Once requisition is approved;

Quick Orders - A purchase order is created in Adobe Acrobat and emailed to the Requisition Preparer to print, fax or mail to supplier

Rutgers Exchange and Internal Suppliers - A purchase order is automatically generated and sent to the supplier

Oracle Exchange and Non-Catalog - Upon review and approval by buyer, a purchase order will be automatically generated and sent to the supplier.

- Step 6 Requisition commitment reversed and purchase order commitment reflected on OFIS the following day
- Step 7 Supplier ships goods or performs service
- Step 8 Requisition Receiver acknowledges receipt (for purchases over \$1,000)
- Step 9 Supplier sends invoice to Disbursement Control
- Step 10 Disbursement Control submits payment to the supplier

University Information Protection and Security

- To access RIAS, you must have a Rutgers Net ID (RCI, Crab, or Andromeda). If you don't have a NetID, go to <http://netid.rutgers.edu/> and create one.
- Select a good password and refrain from sharing your password. You are accountable for transactions submitted under your password. In selecting a good password you should use a combination of upper and lower case letters, numbers, and special characters. It is recommended that you change your password before "Go Live." Do not save your password to your Internet browser.
- Be aware of Social Engineering and attempts by unauthorized personnel to gain system access by impersonating bona fide employees.
- If you don't already have McAfee anti-virus software installed on your personal computer, download it from this website <http://mssg.rutgers.edu/license/McAfee> and install it.
- Password-protect or disable windows file sharing on your desktop
- Use caution when opening unexpected email attachments and downloading files from the Internet. Do not send sensitive data
- When you are logged onto RIAS, do not leave your PC unattended. Either engage a password protected screen saver or log out when your workstation will be unattended
- Protect the confidentiality of University Information and review the agreement at <http://www.rutgers.edu/agreement>
- Whenever personnel depart the university, terminate their access privileges on a timely basis using the form located at <http://www.rci.rutgers.edu/~rias/formsrequirements.html>
- Perform at least a weekly backup of your critical documents stored on your personal computer.
- Become familiar with university and departmental computing policies (<http://www.rucs.rutgers.edu/policies.html>)

For more information, see <http://www.rusecure.rutgers.edu/rias.html>

Logging on to RIAS Procure-to-Pay Applications

Scope

This procedure covers logging on to Internet Procurement's Home Page.

1. Open web-browser and type in: **http://www.riasapps.rutgers.edu**
2. Enter your NetID (RCI, Crab or Andromeda) user name and password

Note: For procedures on establishing a University ID network (NetID), see <http://netid.rutgers.edu>



RIAS
Rutgers Integrated Administrative System
Procure-to-Pay Applications

THE STATE UNIVERSITY OF NEW JERSEY
RUTGERS

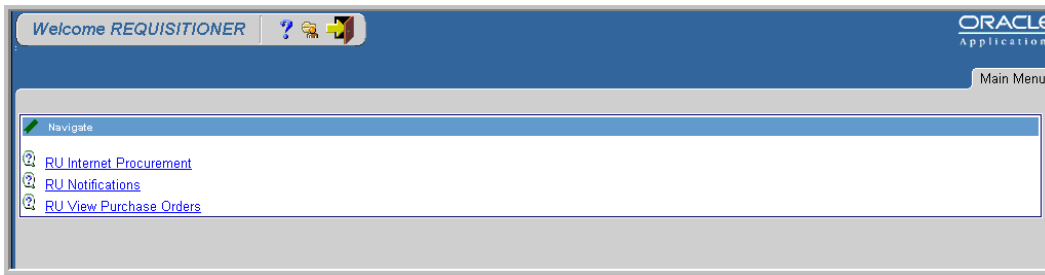
User Name
Password

Connect

Note: A user name is a unique identifier for each person who uses RIAS. The password field does not display the characters that are typed in order to protect the confidentiality of the password. Users must keep passwords confidential to prevent unauthorized users from gaining access to the system.

Many browsers provide you the ability to locally store your password in the browser cache. Please do not select this option, because if your computer is compromised your password may be compromised also.

3. Click **Connect**. The RIAS Applications Homepage shown below will be displayed.



Note: If you attempt to login when the system is unavailable or if you enter an incorrect password, you will see the below message.



If you need assistance logging in, please contact a RUCS Help Desk.

RUCS Help Desks:	732-445-4357 (New Brunswick)
	856-225-6274 (Camden)
	973-353-5083 (Newark)
NetID, Web Browser, Login and Password Questions	

4. Click **RU Internet Procurement** link



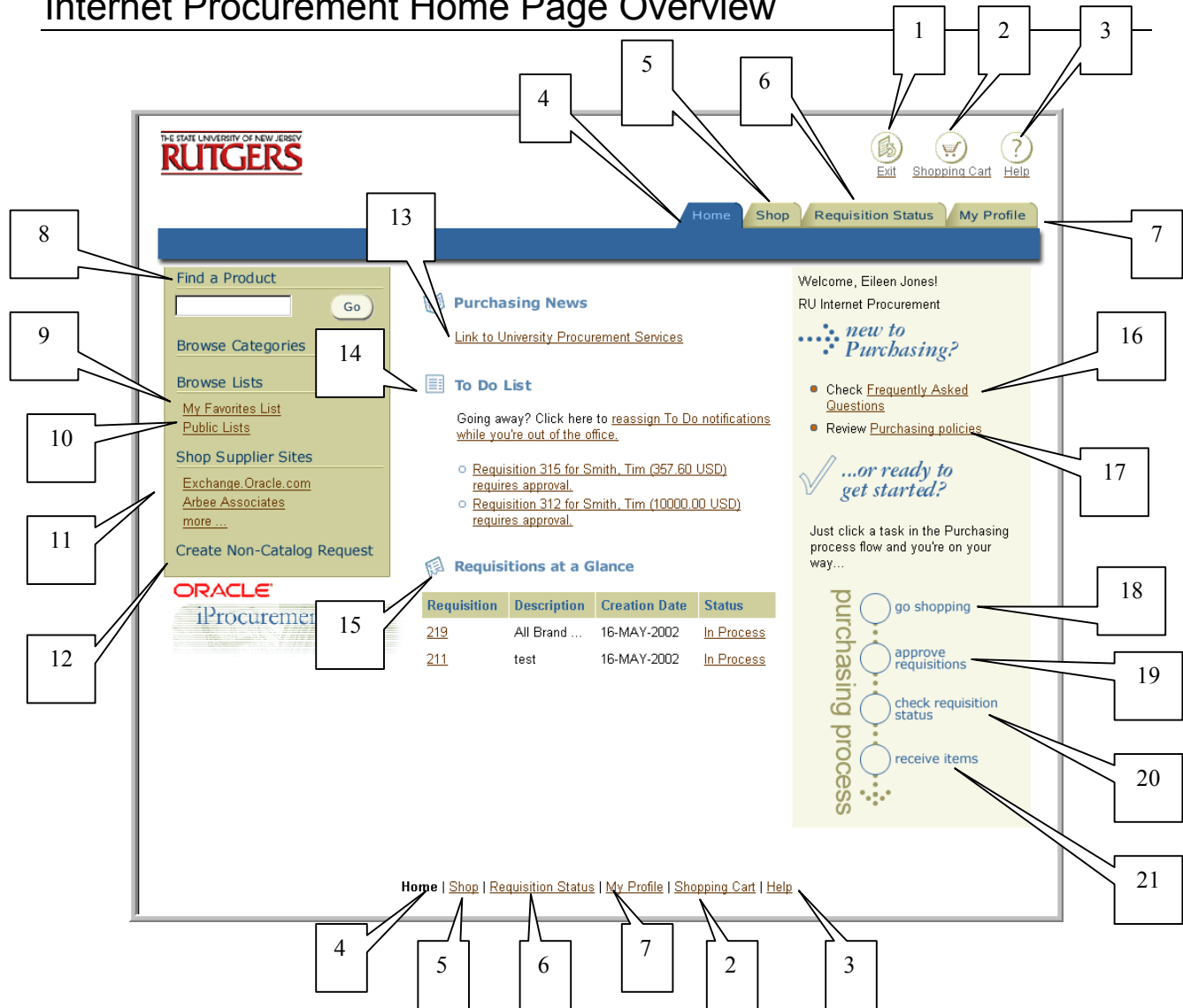
5. Click **Home Page** link to open the Internet Procurement Homepage

Internet Procurement Navigation

- Use scroll bars on right and bottom of screen
- Use the “Tab” key to proceed through requisition form fields
- Use the “Continue,” “Proceed,” “OK,” or similar buttons to progress through the requisition data entry process
- Underlined words represent links
- An asterisk (*) denotes a required field
- Flashlight icon denotes a List of Values (LOV) field
- The percent symbol (%) serves as a wildcard to search for data in fields denoted by the flashlight icon



Internet Procurement Home Page Overview



1. **Exit** – Use this link to close your RIAS session and return to the RIAS Applications screen. All unsaved shopping carts will be lost if you click on this link
2. **Shopping Cart** – Use this link to retrieve saved shopping carts or return to the “in-process” cart
3. **Help** – Use this link to access help documentation
4. **Home** – Use this tab to return to the Internet Procurement Home Page
5. **Shop** – Use this tab to begin the creation of a requisition
6. **Requisition Status** – Use this tab to view the status and manage all of your requisitions, review and respond to notifications, enter receipts and retrieve all requisitions requiring your approval

7. **My Profile** – Use this tab to set default delivery information and default charge accounts
8. **Find a Product** – Use this free-form field to search for a catalog item from an internal Rutgers supplier and begin the creation of a requisition
9. **My Favorites List** – Use this link to view the items you saved as “Favorites” and begin the creation of a requisition
10. **Public Lists** – (Future Use) - Use this link to retrieve items provided by University Procurement Services and begin the creation of a requisition
11. **Shop Supplier Sites** – Use this link to search for a catalog item from an Oracle or Rutgers Exchange supplier and begin the creation of a requisition

Rutgers Exchange Suppliers will be reflected as specific links to their own web sites. Use these links to search for a catalog item from the supplier’s web site and obtain negotiated prices for Rutgers
12. **Create Non-Catalog Request** – Use this link to begin the creation of a requisition to obtain items not available through the Rutgers or Oracle Exchanges, or internal supplier lists
13. **Purchasing News** reflects news updates provided by the University Procurement Services and provides a link to its web site
14. **To Do List** reflects open notifications requiring your attention and will be used to reassign notifications while you are out of the office for a length of time (e.g. vacation days)
15. **Requisitions at a Glance** reflects a partial listing of the most recent requisitions you have created and their status. The most recent requisition will be listed first
16. **Frequently Asked Questions** – Use this link to search frequently asked questions
17. **Purchasing Policies** – Use this link to search University Procurement & Contracting policies
18. **Go Shopping** – Use this link to begin the creation of any requisition (catalog or non-catalog)
19. **Approve Requisitions-** Use this link to view and approve requisitions; and review and respond to notifications
20. **Check Requisition Status-** Use this link to view and manage your requisitions, review and respond to notifications, and retrieve all requisitions requiring your approval
21. **Receive Items** – Use this link to view and acknowledge receipts, view and manage your requisitions, review and respond to notifications, and retrieve all requisitions requiring your approval

RIAS Procure-to-Pay Process Help Resources

<p>Purchasing Help Desk:</p> <p>Internet Procurement Navigation & Application Questions, and Other Purchasing Process Questions</p>	<p>732-932-8888 (New Brunswick)</p> <p>856-225-6915 (Camden)</p> <p>973-353-1931 (Newark)</p>
<p>RUCS Help Desks:</p> <p>NetID, Web Browser, Login and Password Questions</p>	<p>732-445-4357 (New Brunswick)</p> <p>856-225-6274 (Camden)</p> <p>973-353-5083 (Newark)</p>
<p>Accounting Help Desk:</p> <p>Invoice Processing, TABER Processing, OFIS Access, Account Associations to Organizations and Other Accounting Questions</p>	<p>732-445-1111 (All Campuses)</p>
<p>Administrative Computing Help Desk:</p> <p>SecurID Account Questions</p>	<p>732-445-4638 (All Campuses)</p>
<p>RIAS Project Web Site:</p> <p>General Information and FAQ RIAS Procedures & Forms RIAS Sandbox (Practice Applications) Hardware and Software Requirements Help Resources List of Approvers by Organization List of Accounts by Organization Number</p>	<p>http://rias.rutgers.edu</p>
<p>University Procurement Services Web Site:</p> <p>Purchasing Information Helpful Reference Links</p>	<p>http://procure.rutgers.edu</p>
<p>Office of the University Controller Web Site:</p> <p>OFIS Manual and Access Forms</p>	<p>http://www.rci.rutgers.edu/~univcont</p>
<p>University Human Resources Web Sites:</p> <p>RIAS Training Courses List of Organization Identification Numbers</p>	<p>http://uhr.rutgers.edu/profdev</p> <p>http://uhr.rutgers.edu/rias</p>

Agreement for Accessing University Information	http://www.rutgers.edu/agreement
Standards for University Operations Handbook	http://www.rutgers.edu/oldqueens.standards.html

Requisition Fields Printed on Purchase Order

Only the following fields will be seen by the supplier:

- Item Description
- Unit of Measure
- Quantity
- Unit Price and Total
- Supplier Name and Address
- Need by Date
- Requester Name
- Deliver-to-Location
- Notes to Supplier

Note: All other fields not mentioned above would be used for internal purposes only

Step 1 – Non-Catalog

Scope

This procedure covers the first step in creating a requisition when preparing a non-catalog request. A non-catalog request is used to purchase goods and services not available in an online catalog or Exchange.

Non-catalog requisitions will require review by a Procurement and Contracting Buyer to negotiate price, terms, and delivery methods unless it is a Quick Order.

1. Click **Create Non-Catalog Request** link.

The screenshot shows the Rutgers Non-Catalog Request form. The form is titled "Non-Catalog Request" and includes a navigation bar with "Home", "Shop", "Requisition Status", and "My Profile". The form is divided into several sections:

- Select Billing Method (if different than default):** This section has a callout 2 pointing to the "Selected Billing Method" dropdown. The dropdown is currently set to "1. GOODS or SERVICES BILLED BY QUANTITY (Default)". Below this, there are two options: "1. GOODS or SERVICES BILLED BY QUANTITY (Default)" and "2. GOODS or SERVICES BILLED AS AN AMOUNT".
- Select a Supplier using the Flashlight (Required for Quick Orders and Check Requests):** This section has a callout 3 pointing to the "Name" field, which is currently set to "Xerox Corp". Other fields include "Site" (DALLAS-01) and "Supplier Address" (Omnifax Division).
- Describe Your Item:** This section has a callout 5 pointing to the "Category" field, which is currently set to "Equipment". Below this is the "Item Description" field, which is currently set to "Xerox Copier model 12345 and Stippler Attachment 345". A callout 8 points to the "Item Description" field. Below this is the "Unit of Measure" field, which is currently set to "Each". A callout 9 points to the "Unit of Measure" field. Below this is the "Quantity" field, which is currently set to "1". A callout 10 points to the "Quantity" field. Below this is the "Estimated Unit Price" field, which is currently set to "10000". A callout 11 points to the "Estimated Unit Price" field. A callout 12 points to the "Add to Cart" button.

The form also includes a "Forms and Attachments" section with "Clear All", "Add to Cart", and "Add to Favorites" buttons. The footer of the form includes "Home | Shop | Requisition Status | My Profile | Shopping Cart | Help".

2. Select the appropriate **Billing Method**. The default method will be *Goods or Services Billed by Quantity*. To change to *Goods or Services Billed as an Amount*, click on **Select** link to left of the method's description.

Select Billing Method (if different than default)

Selected Billing Method **1. GOODS or SERVICES BILLED BY QUANTITY** (Default)
 Example: 10 books at \$25 each

Click below to select a different Billing Method

> [Select](#) (Reserved for future use - Do not use)

> [Select](#) **2. GOODS or SERVICES BILLED AS AN AMOUNT**
 Example: \$10,000 worth of miscellaneous supplies (No on-line receiving / Manual Certification if \$1,000 or more)

3. If you wish to suggest a supplier, enter search criteria using the % wildcard (e.g. %Xerox%) in the **Supplier Name** field, then click on flashlight icon.

Note: A valid supplier and site must be selected if you are preparing a check request or Quick Order request.

Search

Enter search criteria and press the **Go** button to find suppliers.

Search By:

4

4. Select **Search By** criteria (either **Supplier**, **Supplier Site**, or **Supplier Address**), then click **Go**.

Hint: If you are preparing a check request for a petty cash reimbursement, select *supplier site*, then search by the petty cash custodian's full name.

If you see your supplier and site listed, click **Select** to the left of the appropriate supplier/site. This will return you to the Non-Catalog Request screen. Notice that the supplier site and address fields are automatically populated.

If you do not see your supplier and site, and have verified your search criteria, refer to the Requesting New/Update Suppliers and Sites procedure.

Search

Enter search criteria and press the **Go** button to find suppliers.

Search By

Search Results

Press the **Select** button to choose a supplier. If you can't find the value you want, try searching again with different criteria.

⏪ Previous 1 - 8 shown of 8 Next ⏩

Select	Supplier	Supplier Site	Supplier Address
<input type="button" value="Select"/>	Cheshire / A Xerox Co	Mundelein-01	404 Washington Boule
<input type="button" value="Select"/>	Xerox Colorgrafx Systems	San Jose-01	5853 Rue Ferrari
<input type="button" value="Select"/>	Xerox Corp	Dallas-01	Omnifax Division
<input type="button" value="Select"/>	Xerox Corp	PRINCETON-01	100 Overlook Center

5. Enter search criteria using the % wildcard in **Category**, then click **Go**.

Search

Enter search criteria and press the **Go** button to find categories.

Search By

6. Select **Search By** criteria (either **Category Name** or **Category Description**) then click **Go**.
7. Click **Select** to the left of the appropriate category classification for your purchase. This will return you to the Non-Catalog Request screen.

Note: For requisitions with multiple lines, do not combine a Check Request category with any other type of category on the same requisition.

Search

Enter search criteria and press the **Go** button to find categories.

Search By

Search Results

Press the **Select** button to choose a category. If you can't find the value you want, try searching again with different criteria.

◀ Previous 1 - 1 shown of 1 Next ▶

Select	Category Name	Category Description
<input type="button" value="Select"/>	Equipment	All Equipment

◀ Previous 1 - 1 shown of 1 Next ▶

8. Enter a complete description of the goods or services you are requesting in **Item Description**. The description should include size, model number and any other pertinent information.

Note: This field is limited to 240 characters. If additional space is needed, include an attachment on Step 4 – Enter Notes and Attachments.

If you need to indicate that payment for this purchase must be made in a foreign currency, enter all the relevant information before entering the details of the item description in this field.

If you need to indicate that fixed, recurring payments must be made to the supplier (e.g. lease payments), enter all the necessary information for the payments in this field complete with the recurring payment amount and due dates for each payment.

9. Select the appropriate **Unit of Measure** using the drop down list if your billing method is *Goods or Services by Quantity*. The value *Each* will be the default value.

Attachments screen

* Unit of Measure

* Quantity

* Estimated Unit Price

Each

Envelope

Flat

Foot

Furlong

Gallon

Gallon1/2

Gram

Gross

Hand

Hectare

10. Enter **Quantity** per Unit of Measure if your billing method is *Goods or Services by Quantity*.
11. Enter the **Estimated Unit Price/Estimated Amount** using the decimal point if cents will be indicated. For example, \$500.25 should be typed in as 500.25 You do not need to type in the decimal point, if there are no cents. So, an amount for \$500 can simply be keyed in as 500. Do not include any other punctuation such as dollar signs (\$) or commas in this field.

If you wish to denote a discounted unit price for an item, enter the net estimated unit price in this field, then indicate all the details in a **Note to Buyer** in Step 4 – Entering Notes and Attachments.

12. Select **Add to Cart** to add the item information into your Shopping Cart. Select the **Clear All** button to clear all the information displayed and begin again. Select **Add to Favorites** button if you wish to add this item to your Favorites list. If you select **Add to Favorites**, refer to My Favorites procedure.

Based upon the category you selected in step 7, after you selected **Add to Cart**, a Special Item Information screen may be displayed. If so, enter the appropriate information requested on this screen then select the **Done** button. This will take you to the Shopping Cart Contents screen.

On the Shopping Cart Contents screen, several features are introduced.

- a. Requisition Step Indicator shows you the step you currently are in and the overall requisition creation process
- b. **Quantity** field allows you to update the quantity of your item on this screen. Select the **Update** link to view the updated totals
- c. Select the Garbage Can Icon to delete a requisition line from your cart

The screenshot shows the Rutgers Shopping Cart Contents page. At the top, there is a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. Below this is a progress indicator with steps: Shopping Cart, Delivery, Billing, Items, Approvers, and Review & Submit. The main content area is titled 'Shopping Cart Contents' and features a table with the following data:

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Xerox Copier model number 12345 with additional stapler attachment number 232		Each	<input type="text" value="1"/>	10000.00	10,000.00		Xerox Corp	PRINCETON-01
						update Total \$ 10,000.00			

Below the table, there is a link to 'Return to Shopping' and a checkbox labeled 'CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY'. At the bottom, there are two buttons: 'Save Cart' and 'Proceed to Checkout'.

- d. If displayed, select the link under Special Information on a line to view or update special item information for your item.
13. If you wish to add another item to your requisition from the supplier you indicated in step 4 or include shipping and handling charges, select **Return to Shopping** link and repeat steps 8 through 12. If you wish to add an item from a different supplier, complete this requisition and create a new requisition for the other supplier. Only one supplier should be referenced on a requisition. Otherwise continue to step 14.

Note: If you select **Return to Shopping**, you will return to the Non-Catalog Request screen. Erase the information displayed in **Item Description** and enter the new item description for your next item. This does not delete the previous item description that you added to your shopping cart. Continue to modify if necessary, values displayed in **Unit of Measure, Quantity** and **Estimated Unit Price/Estimated Amount**. Once completed, select **Add to Cart**.

14. If the requisition is either a Check Request or Quick Order, select the checkbox next to **Check Here for Quick Orders and Check Requests Only** *No need to check this box if using a RU Exchange Supplier*.
15. Select **Proceed to Checkout**.

Note: To save the items in your cart and complete the requisition at a later time, select **Save Cart** button. If you selected **Save Cart**, refer to Shopping Cart Management procedure.

16. Continue to Step 2 – Enter Delivery Information.

Step 1 - Rutgers Exchange

Scope


This procedure covers the first step of the requisition creation process when requesting from a Rutgers Exchange supplier.

A Rutgers Exchange supplier is an external supplier who has agreed to offer discount pricing to Rutgers and whose goods can be accessed directly through a web link through Internet Procurement. Requisitions created using a Rutgers Exchange supplier will not require the review of a Purchasing Buyer regardless of the total purchase. Once the requisition has been approved, your request will be automatically sent to the supplier.

The following suppliers will participate as a Rutgers Exchange supplier:

1. Arbee Associates
2. Boise Cascade Office Products
3. CDW Government
4. Fisher Scientific
5. MSC Industrial Supply
6. Sigma-Aldrich
7. Staples
8. VWR Scientific

The most current listing of Rutgers Exchange suppliers is available on the RIAS web site at: <http://www.rias.rutgers.edu>.

- 
1. Select the **More** link under **Shop Supplier Sites**. Click on the specific supplier link you wish to use. This will take you directly to the supplier's web site.

Note: Rutgers discount pricing will be reflected if you select the supplier's web site displayed in Internet Procurement.

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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Catalogs Shopping Lists Non-Catalog Request

Search American English Search Tips [Browse all categories](#)

Supplier Sites


Your Purchasing department has established buying relationships with the following suppliers. Click a supplier site link to view and buy the items sold by this supplier.

Name	Description
Exchange Oracle.com	The Exchange for Big Business, Small Business, All Business
Staples, Inc.	Staples, Inc. is a premier office supplier and can service all customers they way they want to do business.
Boise Cascade Office Products	Corporate supplier of office supplies, paper, technology products and furniture.
MSC Industrial Supply	Industrial Supplier
VWR International	VWR International Punchout site. The world's largest Life Sciences supplier catalog. Contact VWR Ebusiness to be approved as a punchout customer. Cindi Hanley - 610-429-5583
Sigma-Aldrich	Sigma-Aldrich develops, manufactures and distributes the broadest range of high quality biochemicals, organic chemicals, chromatography products and diagnostic reagents available in the world. The Company's products are used in high-tech research and development in universities and industry, in the diagnosis of disease, and as specialty chemicals for pharmaceutical and other manufacturing purposes in more than 160 countries.
Fisher Scientific Company L.L.C.	
CDW Government	CDW"G, a wholly owned subsidiary of CDW Computer Centers, Inc. (Nasdaq: CDWC), provides direct computing solutions to educational institutions and government agencies. CDW"G stands apart from the competition by offering expert advice, superior customer support, competitive pricing and a vast product offering tailored to fit the unique needs of education and government customers.
Arbee Associates	






[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- Follow the supplier's instructions on how to go shopping on their web site. Once you have completed your shopping, proceed to "check out" of the supplier's web site. Upon check out, you will be returned to Internet Procurement to the Shopping Cart Contents screen with your selected items displayed.

Note: You are encouraged to save your frequently purchased items on the specific vendor's "favorites" list before checking out of their web site.

 **Shopping Cart Contents**

[▶ Open Saved Cart](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	2002 Daily 24-Hour Appointment Book, 6 7/8" x 6 3/4", Black		Each	<input type="text" value="1"/>	16.43	16.43		Staples Business Advantage	S HACKENSACK-01
2	MP1200 Laser Pointer, Plastic		Each	<input type="text" value="3"/>	18.00	54.00		Staples Business Advantage	S HACKENSACK-01
3	Sit/Stand LCD Presentation Cart, 37"W x 22 1/2"D x 27" - 41"H		Each	<input type="text" value="1"/>	333.58	333.58		Staples Business Advantage	S HACKENSACK-01
4	Flip Chart Mimio		Each	<input type="text" value="6"/>	268.57	1,611.42		Staples Business Advantage	S HACKENSACK-01
5	Post-It American Flag Tape Flags, 1", 50/Pk		Each	<input type="text" value="1"/>	1.62	1.62		Staples Business Advantage	S HACKENSACK-01
update						Total \$	2,017.05		

To view new totals after updating quantities, click the **update** link.

[Return to Shopping](#)

CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY No need to check this box if using an RU Exchange Supplier.

Save the items in your cart and complete the checkout process at a later time.
[Learn more.](#)

Easy step-by-step checkout lets you enter detailed delivery and billing instructions.

3. Continue to Step 2 – Enter Delivery Information.

Note: If you wish to add additional items from the RU Exchange supplier you just checked out of before you continue to next step, select **Save Cart** and follow the Shopping Cart Management procedure. Return to the Internet Procurement home page, and repeat the above steps. Once you return to the Internet Procurement Shopping Cart Contents screen, follow the steps to combine shopping carts in the Shopping Cart Management procedure.

Note: Do not add a non-Rutgers Exchange good/service item to this requisition since only lines selected using the Rutgers Exchange will be automatically sent to the supplier once approved.

Step 1 – Rutgers Internal Suppliers

Scope

This procedure covers the first step of the requisition creation process when doing a catalog request for a Rutgers internal supplier in Internet Procurement.

Each internal supplier in RIAS will be assigned a unique contract number that will be displayed. Once the requisition is approved, you will be assigned a unique release number against the Contract Number. This will be displayed with a dash, then a number following the contract number which is your unique internal purchase order number.

For all Rutgers Internal Suppliers not reflected in RIAS, continue to use the paper-based Internal Purchase Order.

The internal suppliers available in RIAS are:

1. New Brunswick Computer Support Services - Rutgers Computer Store
2. New Brunswick Computer Support Services – Rutgers Computer Repair
3. New Brunswick Computer Support Services – Rutgers Computer Software
4. Facilities Maintenance (Newark and Camden Campuses)
5. Mail and Document Services
6. Material Services
7. Rutgers College – Student Center Space Reservations
8. Administrative Computing Services-SecurID Card
9. New Brunswick Dining Services – Catering
10. Knight Express

The most current listing of Rutgers internal suppliers reflected in RIAS is available on the RIAS web site at <http://www.rias.rutgers.edu>

-
1. Contact the internal supplier for an estimated quote and/or reference number. This can be accomplished either by phone, email or by using their web site.
 2. Enter search criteria in **Find a Product** on your Internet Procurement homepage (or **Search** if you have selected another shopping link) using the % wildcard. Select **Go**.

Note: For a complete listing of all internal suppliers, enter **%IPO%**.

2 points to the search bar containing the text "%IPO%".

3 points to the "Previous" and "Next" navigation links at the top right of the results table.

4 points to the "Filter Results or Sort by" dropdown menu.

6 points to the "Contract Number" column in the search results table.

Select	Description	Unit	Unit Price	Supplier	Supplier Item	Supplier Site	Internal Item Number	Contract Number	Category
<input type="checkbox"/>	Dining Services Catering	Each	1.00	IPO: Dining Services Catering		DINING SERVICES	22	63	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Knight Express Card	Each	1.00	IPO: Knight Express - Dining		KNIGHT EXPRESS	23	64	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Business Materials - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	37	70	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Copy Services - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	38	79	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Design Services - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	39	81	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Mail and Document Services	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	40	82	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Mailing Services - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	41	84	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Professional Printing - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	42	85	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Specialty Printing - MDS	Each	1.00	IPO: Mail and Document Services		MAIL & DOC SVCS	43	87	Category for Internal Purchase Order Suppliers
<input type="checkbox"/>	Rutgers College Space and Catering	Each	1.00	IPO: Rutgers College Campus Centers		RC SPACE RENTAL	44	126	Category for Internal Purchase Order Suppliers

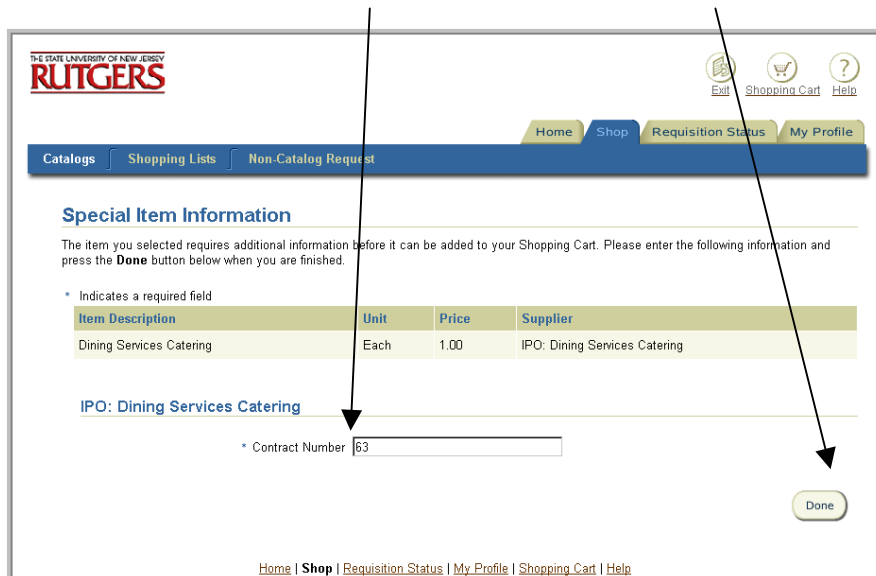
- Review the listing of matched items. To view additional items, select the **Next** link on the bottom or top right of your screen, if displayed. To review previous items, select the **Previous** link.
- If you wish to filter or sort your results, select **Filter Results** or **Sort by** criteria (**Description, Supplier** or **Category**) using the drop-down box. Select either ascending or descending by clicking on the radial button. Click **Go**.



5. Click **Select** check box to the left of the item you wish to add to your requisition.

Note: If your item is not displayed, check and/or modify your search criteria and repeat the above steps.

6. Click **Add to Cart** to add the item information into your shopping cart. Select **Add to Favorites** if you wish to add this item to your Favorites list. If you select **Add to Favorites**, refer to My Favorites procedure.
7. Enter the reference number you were provided with when you contacted the internal supplier and other required information displayed in the Special Information screen. Click **Done**.



8. Change the **quantity** of 1 displayed to the total estimated dollar amount of your purchase. Select the **update** link to view the updated total. Select **Proceed to Checkout**.

The screenshot shows a shopping cart interface with a progress bar at the top containing steps: Shopping Cart, Delivery, Billing, Notes, Approvers, and Review & Submit. The main heading is 'Shopping Cart Contents' with a sub-link 'Open Saved Cart'. Below this is a table with the following data:

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Dining Services Catering (NB Campus)	IPO: Dining Services Catering	Each	<input type="text" value="1"/>	1.00	1.00		IPO: Dining Services Catering	DINING SERVICES
						update Total \$ 1.00			

Below the table, there is a link 'Return to Shopping' and a checkbox with the text: 'CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY No need to check this box if using an RU Exchange Supplier.' There are two buttons: 'Save Cart' and 'Proceed to Checkout'. The 'Save Cart' button is accompanied by the text: 'Save the items in your cart and complete the checkout process at a later time. Learn more.' The 'Proceed to Checkout' button is accompanied by the text: 'Easy step-by-step checkout lets you enter detailed delivery and billing instructions.'

9. Continue to Step 2 – Enter Delivery Information.

Step 1 – Oracle Exchange

Scope

This procedure covers the first step of the requisition creation process when doing a catalog request using Oracle Exchange.

Suppliers on Oracle Exchange will not reflect Rutgers discount pricing. Only Rutgers Exchange suppliers specifically listed under the heading **Shop Supplier Sites** will reflect Rutgers discount pricing.

Caution: Some RU Exchange suppliers may also be found on Oracle Exchange. Requisitions created using Oracle Exchange will require the review of a Procurement & Contracting Buyer unless it is a Quick Order.

1. Select the **More** link under **Shop Supplier Sites**. Click on **Exchange.Oracle.com**.
2. Enter search criteria in **Search** field using the % wildcard. You may search either by supplier name, item number or description. Select **Go**.

Note: You must enter at least one character with the % wildcard to execute a search.

2

4

3

Select	Description	Unit	Unit Price	Supplier	Supplier Item	Supplier Site	Internal Item Number	Contract Number	Category
<input type="checkbox"/>	Crystal Fresh Flavored Water, 5 Gallon Plastic Jug	Each	6.30	R J Sparkling Water Distributors	772427903	Hammonston-01	1	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)
<input type="checkbox"/>	Purified Drinking Water, 5 Gallon Plastic Jug	Each	6.75	R J Sparkling Water Distributors	150009904	Hammonston-01	2	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)
<input type="checkbox"/>	Crystal Fresh Flavored Water, 12 oz Bottles	Each	7.35	R J Sparkling Water Distributors	807948966	Hammonston-01	3	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)
<input type="checkbox"/>	Crystal Fresh Flavored Water, Case of 24 (12 oz Bottles)	Case	15.50	R J Sparkling Water Distributors	774899904	Hammonston-01	4	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)
<input type="checkbox"/>	Crystal Fresh Hot and Cold Full Size Dispenser (Dimensions: 36 1/2\"/>	Each	10.75	R J Sparkling Water Distributors	781348475	Hammonston-01	5	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)
<input type="checkbox"/>	Crystal Fresh Hot and Cold Countertop Dispenser (Dimensions: 18 1/2\"/>	Each	8.75	R J Sparkling Water Distributors	6407915427	Hammonston-01	6	4	Water, Water, Water Coolers, and Supplies (Buyers: E. Bullock-NB, J. Murray-CAM, I. Angeltone-NWK)

Review the listing of matched items. To view additional items, select the **Next** link on the bottom or top right of your screen, if displayed. To review previous items, select the **Previous** link. Items denoted with a blue dot that **Indicates Negotiated Prices** does not reflect Rutgers discount pricing.

If you wish to filter or sort your results, select **Filter Results** link or **Sort by** criteria (Description, Supplier or Category) using the drop-down box. Click **Go**.

3. If your item is reflected, click **Select** check box to the left of each item you wish to add to your requisition.

If your item is not displayed, check and/or modify your search criteria and repeat the above steps. If your item is still not reflected, you may wish to create a non-catalog request. Refer to Step 1 – Non- Catalog procedure for details.

Hint. Click **Select All** link if you wish to select all items. Click **Clear All** link if you wish to deselect all items.

4. Click **Add to Cart** to add the item information into your shopping cart. Select the **Add to Favorites** if you wish to add this item to your Oracle Exchange Favorites list. Select **Compare** if you wish to compare the items you selected. Select **Check Availability** if you wish to confirm the availability of the items you selected.
5. Select **Done Shopping**.
6. Continue to Step 2 – Enter Delivery Information.

Step 2 – Entering Delivery Information

Scope

This procedure covers the second step of the requisition creation process.

The delivery values for **Requester Name** and **Deliver-to Location** that are defined in My Profile will be the default information displayed. All default values displayed can be changed.



1 Indicates a required field

2 Who is requesting the items?

4 Deliver-To Location

6 Yes

7 Continue

1. Verify the **Need-By-Date** is accurate. The default will be 21 days from the current date. If not, enter the new, future **Need-By-Date** using the following format: DD-MON-YYYY. (e.g. 01-JUL-2002).

Note: If a saved Shopping Cart is being used, the screen will appear in a different format than example displayed.

2. Verify the **Requester** field reflects the name of the individual who will be receiving the goods or services being ordered. The default will be the Requisition Preparer's name unless otherwise defined in My Profile. See related procedure entitled Editing Default Information in My Profile.

To change the Requester named, enter search criteria using the % wildcard (e.g. %Smith%) in the **Requester** field, then click flashlight icon. Click **Go**.

3. Click **Select** to the left of the individual you wish to indicate as Requester.
4. Verify the **Deliver-to-Location** reflects the code for the address you wish the goods or services to be delivered to. The default will be the Requester's location.

To select another location, enter search criteria using the % wildcard in **Deliver-to-Location**, then click on flashlight icon.

5

Search and Select: Deliver-To Location

Choosing a value for the location field is a two-step process. First, search for locations. Second, select a location from the search results.

Search

To search for the value you entered on the previous page, press the **Go** button now. To search using different criteria, delete or change the value in the search field and then press **Go**.

Search By %BSH 3858 1%

5. Select **Search By** criteria: **Location (Organization)** or **Location Description**. Choose **Location (Organization)** if you wish to search using the naming convention below. Choose **Location Description** if you wish to search using a building's name. Click **Go**. If your location is reflected, click **Select** to the left of the location you wish to indicate on your requisition.

Note: The naming convention of **Location (Organization)** is:

- a. 3 digit campus code
- b. 4 digit building number
- c. 5 digit room number
- d. 1 digit wing number (if applicable)

This location will be translated by the system into a postal address that will appear on the approved purchase order.

Requisitions for radioactive materials and radiation producing equipment must reflect a **Deliver-To Location** of Rutgers Environmental Health and Safety. Select **Location (Organization)** and choose the location of **LIV 4127** in the above step.

Requisitions for incoming shipments of equipment and supplies for departments not equipped to handle such shipments should reflect a **Deliver-To Location** of University Material Services. Select **Location (Organization)** and choose the location of **LIV 4128** in the above step.

Search and Select: Deliver-To Location

Choosing a value for the location field is a two-step process. First, search for locations. Second, select a location from the search results.

Search

Enter search criteria and press the **Go** button to find locations.

Search By Location (Organization)

Search Results

Press the **Select** button to choose a location. If you can't find the value you want, try searching again with different criteria.

Previous 1 - 10 shown of 53 Next >

Select	Location (Organization)	Location Description
<input type="button" value="Select"/>	BSH 3858 101 (RU)	Biomedical Engineering Modular Building Rm 101
<input type="button" value="Select"/>	BSH 3858 102 (RU)	Biomedical Engineering Modular Building Rm 102
<input type="button" value="Select"/>	BSH 3858 103 (RU)	Biomedical Engineering Modular Building Rm 103
<input type="button" value="Select"/>	BSH 3858 104 (RU)	Biomedical Engineering Modular Building Rm 104

If your location is not reflected, check and/or modify your search criteria and repeat the above step. Department names are not displayed. If your location is still not reflected, you

may wish to use the browser's back button, and select the **Enter a one-time address** link. Manually type in the street address, then click **OK**.

To enter a **one-time address**, enter the postal address in the following format:

- Line 1 - Name of Location
- Line 2 – Name of Department and/or Contact (if necessary)
- Line 3 – Complete Street Address
- Line 4 – City, State, Zip

6. Verify whether the delivery information applies to all the items on your requisition by clicking on the appropriate radial button **Yes** or **No**.

Note: If you wish to denote different delivery information by item, ensure that you have the items listed on your requisition on separate lines.

If you selected **No**, once you selected **Continue**, the *Enter Delivery Information for Individual Line Items* screen is displayed. Modify the Deliver-To-Location on each applicable requisition line as described in step 4 above.

Line	Item Description	Need-By Date	Requester	Deliver-To Location
1	Model DC550 Digital Copier	20-JUL-2002	Conlin, Michele	LJV 4086 Add One-Time Address
2	Model SC23-98 Digital Scanner	20-JUL-2002	Conlin, Michele	LJV 4086 Add One-Time Address

[Clear Checkout Changes and Return to Shopping Cart](#) Continue

7. Click **Continue**.

8. Proceed to Step 3 – Enter Billing Information.

Step 3 – Enter Billing Information

Scope

This procedure covers the third step of the requisition creation process.

All segments of the charge account will default to “0” which must be altered to reflect your actual charging instructions. If you do not select the Charge Account link displayed to change the default “0” values, upon submission, your requisition will be automatically routed to University Procurement & Contracting who will return the requisition back to you to modify.

Shopping Cart Delivery **Billing** Notes Approvers Review & Submit

Enter Billing Information

This section is reserved for future use

Accept the default of Yes; click on Continue to proceed

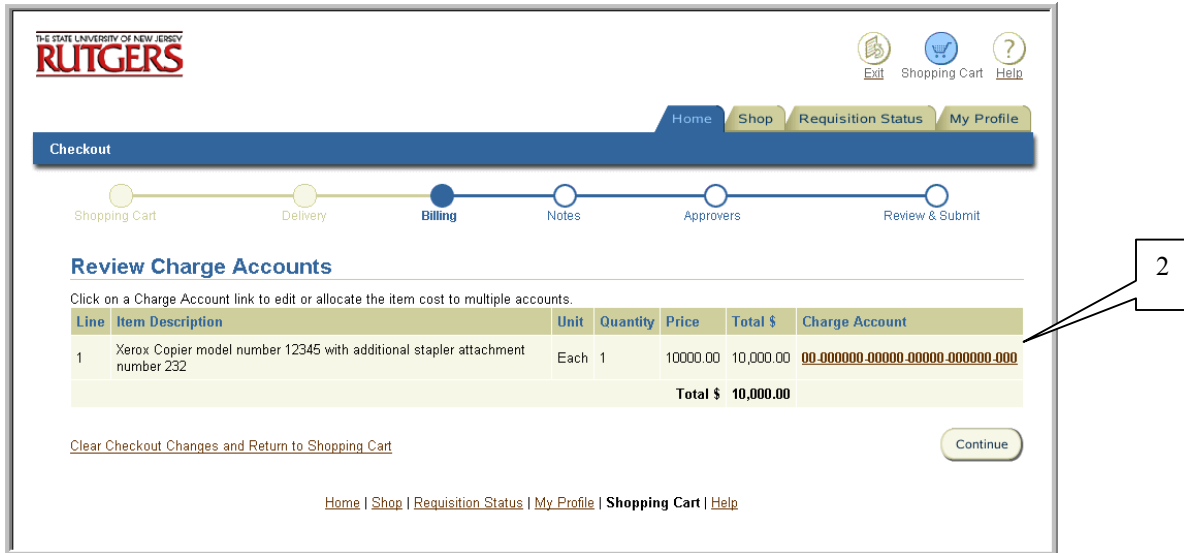
Yes
 No, billing information differs by item

[Clear Checkout Changes and Return to Shopping Cart](#)

Continue

1

1. The above screen will appear when you first come to this step. The sections displayed on this page are for future use. Proceed to the next screen by selecting **Continue**.



2. Select **Charge Account** link displayed as 00-000000-00000-00000-000000-000 for the first item on the requisition.

There are only 3 required fields to be completed in Phase I. They are:

- 1) **Fund Source (Account)** → 6 Digit Value = Legacy Account Number
- 2) **Organization** → 5 Digit Value = New Organizational ID
- 3) **Natural Account** → 5 Digit Value = Legacy Sub/Object Code + 0 (Zero) at the end

Two optional fields entitled **Dept Activity 1** and **Dept Activity 2** have been provided for your use.

Note: There are two charge account rules the system will validate. If you enter an invalid combination when entering your billing instructions, you will receive an error. The account rules are:

Rule 1 – A valid natural account must be entered with a fund source

Rule 2 – The correct assigned organizational id must be entered with a fund source

For more information on charge account rules, see the RIAS web site at <http://www.rias.rutgers.edu>

3. If you will be charging multiple accounts for the first item, click **select multiple charge accounts**.

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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Checkout

Shopping Cart Delivery **Billing** Notes Approvers Review & Submit

Allocate Costs to Multiple Accounts

Selected Line Item

Line	Item Description	Unit	Quantity	Price (USD)	Total \$
▶ 1	Xerox Copier Model Number 12345 and Stapler attachment number 432	Each	1	10000.00	10,000.00

To allocate cost of the selected line item to multiple charge accounts, choose charge account names from the favorite accounts maintained in your personal profile or enter the account values manually. Press the **OK** button when you're finished.

Charge Account	Future (00)	Fund Source (Account)	Organization	Natural Account	Future (000000)	Future (000)	Percent	Quantity	Amount
None	00	201234	10531	21000	000000	000	50.00000	0.50000	5000.00
None	00	421234	10531	21000	000000	000	50.00000	0.50000	5000.00
None									
None									
None									
Total Allocation *							100.00000	1.00000	10000.00

* Must equal 100% of the selected line values

Need to allocate costs to more than five accounts? Click here to [add more lines](#).
[Clear Checkout Changes and Return to Shopping Cart](#)

OK Cancel

Home | Shop | Requisition Status | My Profile | Shopping Cart | Help

11

- If you plan to use an account that you pre-defined in *My Profile* (See Editing Default Information in My Profile procedure), select the appropriate account in the drop down under **Charge Account** and continue to Step 8. Otherwise continue to Step 5.
- Enter the 6-digit account number you wish to charge for your first item in **Fund Source (Account)**.
- Enter the 5-digit organization identification number that corresponds to the fund source you indicated in Step 5 in **Organization**.
- Enter the 5-digit object/subcode that denotes the proper classification of your purchase in **Natural Account**.
- If you have chosen select multiple charge accounts link, enter the percentage, quantity or amount you wish to charge for each account. Once you have allocated 100% of your purchase, select **OK**.

Note: When you select the **multiple charge accounts** link, you are provided with three different methods of distributing the charge (*Percent, Quantity or Amount*). You only need to select one method, then select the Tab key. The system will automatically re-calculate the remaining fields. To allocate costs to more than five accounts, select the **add more lines** link.

9. Optionally, enter free-form text in **Dept Activity 1** and/or **Dept Activity 2**.
10. If you wish to apply this same account information to all requisition lines listed, select **Check Here to Apply this Account to all Requisition Lines**. If not, select **OK** and repeat steps 4 through 9 for each requisition line.
11. Select **OK**. This will return you to the Review Charge Account screen to verify the charge account information is correct. If you have allocated costs to multiple accounts, it will display *Multiple* under Charge Account.
12. Select **Continue**.
13. Continue to Step 4 – Enter Notes and Attachments.

Step 4 – Enter Notes and Attachments

Scope

This procedure covers the fourth step of the requisition preparation process.

The screenshot shows the 'Enter Notes & Attachments' page in the Rutgers Requisition System. The page includes a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. A progress bar indicates the current step is 'Notes'. The main content area is titled 'Enter Notes & Attachments' and includes a legend for required fields, a 'Describe your requisition' section with a text input field and a link to 'automatically default the requisition description', a section for 'Special Check Handling Instructions' with a checkbox and a text input field, and an 'Add notes and attachments' section with two text input fields for 'Note to Buyer' and 'Note to Approver'. Below these is a table for attachments with columns for 'Attention To', 'Type', 'Description', and 'Delete'. A 'Continue' button is at the bottom right.

1. Indicates a required field

2. Requisition Description: Xerox Copier model number 12345 with additional...

3. Special Check Handling Instructions, if any

4. Note to Buyer: A deposit of 1,000 must be sent with the purchase order

5. Note to Approver: Please check the natural account

6. Add Attachments

Attention To	Type	Description	Delete
To Approver	Text	Information on Account Code	Delete

9. Continue

1. Enter a description in the **Requisition Description** field or accept the description of the first line item by selecting the **automatically default the requisition description** link. This description will be reflected under your **Requisitions at a Glance** on your Internet Procurement homepage.

Hint: You may use this field to indicate the reason of the request and/or the requester's name if you chose not to indicate it in the **Requester** field in the previous steps.

2. If the requisition is a check request and you will not be submitting supporting documents to Disbursement Control, click on check box next to **Check this box if you will not be submitting paper supporting documents to the Disbursement Control Office.**
3. If the requisition is a check request and you wish to indicate special check handling instructions, indicate the % wildcard in **Special Check Handling Instructions**, select flashlight icon, then **Go**. Click **Select** to the left of the instruction you wish to indicate.
4. Optionally, you may enter any notes you wish to indicate to the Buyer/Disbursement Control in **Note to Buyer**. This field may contain up to 240 characters.

For example, you may indicate that paper supporting documentation such as a quote is being forwarded in campus mail, or if a deposit must be included with the purchase order.

5. Enter any notes you wish to indicate to the Approver/Reviewer in **Note to Approver**. This field may contain up to 240 characters.

For example, you may indicate that paper-supporting documentation such as petty cash receipts is being forwarded in campus mail.

6. To add an attachment to the requisition, such as a completed form, select **Add Attachments** continue with step 7. Otherwise, select **Continue** and refer to step 10.

7. **To add an attachment**

- a) Indicate the **Attention to** by using the drop down arrow. Do not use Miscellaneous or To Receiver.

Note: When you select **Attention to: Supplier**, your attachment will print on the approved purchase order.

- b) Enter a **Description** of the attachment. This will appear as the name of the attachment's link.
 - c) Select one **Attachment type** by selecting either File or Text. Do not use URL.
8. If you selected **File**, and selected the **Browse...** button, it will open all the files you have access to on your desktop. Select the file you wish to attach, then double-click on the specific file name. The file name should now be displayed in the field next to **File** in Internet Procurement. Ensure that the file you selected conforms to one of the following standards:

1. **Microsoft Word**
2. **Microsoft Excel**
3. **Microsoft Visio**

4. Adobe Acrobat

Note: Confirm that the extension of the file you attached indicates one of the following after the file name - **.xls** (Excel), **.doc** (Word), **.pdf** (Adobe Acrobat) or **.vsd** (Visio). If not, please assign the appropriate extension to the file name if not already displayed.

If you selected **Text**, enter your free-form text.

- d) Select **OK**.
- 9. If you wish to add another attachment, repeat steps 6 through 8. Once completed, select **Continue**.
- 10. Continue with Step 5 – Review Approver List

Step 5 – Review Approver List

Scope

This procedure covers the fifth step of the requisition preparation process.

The Approver List displays your default Approver defined in the requisition approval hierarchy who has the authority to approve the requisition based upon the organizational value(s) indicated in Step 3 and the total dollar amount of the requisition automatically.

Review Approver List & Enter Justifications

Your requisition will be sent to the following list of approvers.

Approver List

Click here to [change the first approver](#).

Sequence	Approver Name	Required?	
1	Jones, Eileen F	No	Delete

[Add Another Approver/Reviewer](#)

Additional Information for Approvers

Note to Approver:

Attach Justifications

Attention To	Type	Description	
To Approver	Text	Information on Account Code	Delete

[Clear Checkout Changes and Return to Shopping Cart](#) [Continue](#)

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | **Shopping Cart** | [Help](#)

1. Determine whether additional Approvers and/or Reviewers are necessary.

A Preparer would add additional Approvers if:

- The requisition is charged to another organization's account.
- A level 2 Approver is preparing the requisition

A Preparer would add additional Reviewers if:

- In special circumstances, departmental guidelines recommend additional review.

A Preparer would select the **change the first approver** link if:

- The default Approver is away, if known.

Review Approver List & Enter Justifications

Your requisition will be sent to the following list of approvers.

Approver List

Click here to [change the first approver](#).

Sequence	Approver Name	Required?	
1	Jones, Eileen F	No	Delete
before 1	<input type="text"/>	No	Delete

[Add Another Approver/Reviewer](#)

To add a Reviewer/Approver:

- a) Select **Add Another Approver/Reviewer**.
- b) Select **Sequence** using the drop down menu.

Note: **Before χ (Where χ is the required Approver)** will send the requisition to the Approver/Reviewer indicated on that line prior to the requisition being approved.

After χ (Where χ is the required Approver) will send the requisition to the Approver/Reviewer indicated on that line after the requisition has been pre-approved* .

* A pre-approved status will be reflected on a requisition if an authorized approver has approved the requisition and has forwarded the requisition to an additional individual.

- c) Enter search criteria using the % wildcard (e.g. %Smith%) in **Approver Name**, click flashlight icon, then **Go**.
- d) Click **Select** to the left of the individual you wish to add.

To Change the First Approver:

- a) Select **change the first approver**.

Review Approver List & Enter Justifications

Your requisition will be sent to the following list of approvers.

Approver List

Click here to [change the first approver](#).

Sequence	Approver Name	Required?	
1	Lyons, Kevin L	No	Delete

[Add Another Approver/Reviewer](#) [Reset Approval List](#)

Press the **Reset Approval List** button to undo any changes you've made to the Approval List.


- b) Enter search criteria using the % wildcard (e.g. %Jones%) in **New First Approver**, click on flashlight icon, then **Go**.

Change First Approver

Enter the new first approver and press the **OK** button at the bottom of the page.

* Indicates a required field

Current First Approver **Lyons, Kevin L**

* New First Approver 

[Clear Checkout Changes and Return to Shopping Cart](#) [OK](#) [Cancel](#)

- c) Click on **Select** to the left of the individual you wish to indicate.

Search and Select: New First Approver

Choosing a value for the approver field is a two-step process. First, search for approvers. Second, select an approver from the search results.

Search

Enter search criteria and press the **Go** button to find approvers.

Employee Name

Search Results

Press the **Select** button to choose an approver. If you can't find the value you want, try searching again with different criteria.

Previous 1 - 2 shown of 2 Next

Select	Employee Name	Employee E-Mail	Employee Number	Organization Name
<input type="button" value="Select"/>	Smith, John		13047	10489 Mail & Document Services

c

d) Select **OK**.

Change First Approver

Enter the new first approver and press the **OK** button at the bottom of the page.

* Indicates a required field

Current First Approver **Lyons, Kevin L**

* New First Approver

[Clear Checkout Changes and Return to Shopping Cart](#)

d

e) Continue with Step 6 – Review and Submit for Approval

Step 6 - Review and Submit for Approval

Scope

This procedure covers the sixth and final step of the requisition creation process.

At this step, you will be assigned a requisition number. A listing of the recent requisitions you prepared will appear in chronological order, with the most recent one listed first under **Requisitions at a Glance** on your Internet Procurement Home Page.

Note: Requisition commitments will be reflected in the Online Financial Information System (OFIS) the following day of requisition submission. Once a requisition has become a purchase order, a purchase order number will be assigned.

Important – The purchase order number will not be the same number as the requisition number.

These purchase order commitments will be reflected in the OFIS System and its corresponding requisition commitment reversed the following day once it has been approved.

The screenshot shows the 'Review and Submit Requisition' page in the Rutgers online procurement system. The page includes a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. A progress bar shows the current step as 'Review & Submit'. The main content area displays the requisition details for Requisition 769, including the total amount of \$10,000.00, the creator (Smith, Tim), and the creation date (25 JUN 2002). A note to the buyer states: 'A deposit of \$1,000 must be sent with the purchase order'. Below this, there is a table for 'Add Attachments' with one entry: 'To Approver' (Text) with description 'Information on Account'. The 'Items' section contains a table with one item: 'Xerox Copier Model Number 12345 and Stapler attachment number 432' (Each, 1, 10000.00, 10,000.00, Xerox Corp). A callout box with the number '1' points to the 'View' link in the 'Items' table. The page also includes a 'Submit' button and a footer with navigation links.

Line	Item Description	Unit	Quantity	Price	Total \$	Supplier
1	Xerox Copier Model Number 12345 and Stapler attachment number 432	Each	1	10000.00	10,000.00	Xerox Corp

1. Review your requisition carefully to verify that all the information is accurate. Select **View** for more details on each line.

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RUTGERS

Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Checkout

Shopping Cart Delivery Billing Notes Approvers **Review & Submit**

Review and Submit Requisition

Please review your requisition carefully to verify that everything's OK.

- **Ready to complete this transaction?** Press the **Submit** button
- **Need to make corrections?** Use your browser's Back button
- **Want to print your requisition?** Click here for a [printer-friendly version of this page](#)

Submit

Requisition 769 **Total \$ 10,000.00**

Created by **Smith, Tim** Urgent Requisition **No**
 Creation Date **25-JUN-2002**
 Description **Xerox Copier**
 Note to Approver **Please check the natural account**
 Note to Buyer **A deposit of \$1,000 must be sent with the purchase order**

[Add Attachments](#)

Attention To	Type	Description	
To Approver	Text	Information on Account	Delete

Items

To view all the information for a line item, click its **View** link.

Line	Item Description	Unit	Quantity	Price	Total \$
Hide 1	Xerox Copier Model Number 12345 and Stapler attachment number 432	Each	1	10000.00	10,000.00

Item Description **Xerox Copier Model Number 12345 and Stapler attachment number 432**

Item Number Requester **Smith, Tim**
 Category Description **All Equipment** Location **LIV 4087**
 Supplier **Xerox Corp** Need-By Date **16-JUL-2002**
 Supplier Site **SAINT PETERS-01**
 Special Info
 Supplier Contact
 Contact Phone Unit **Each**
 Supplier Item Quantity **1**
 Price (USD) **10000.00** Total \$ **10,000.00**
 P-Card Used **No**
 Charge Account **00-288491-10531-21000-000000-000** Taxable **No**
Estimated Tax
Recoverable Tax

Work Order

[Add Attachments](#)

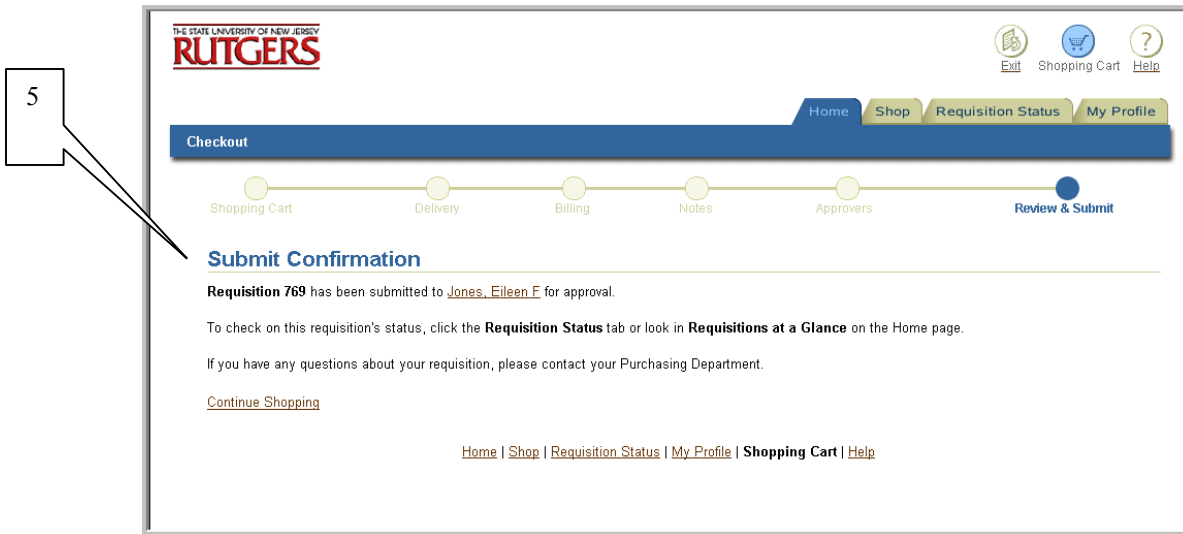
Attention To	Type	Description	

[Clear Checkout Changes and Return to Shopping Cart](#) **Submit**

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- 2 To return to the previous summary page, select **Hide**.

3. If you wish to make any changes, use your browser's back button to the screen you wish to make the modification on, enter the changes, then select the appropriate button (OK or Continue) on each step to return to the Review and Submit Requisition screen.
4. To submit the requisition for approval, select **Submit**.
5. Upon submission, you will receive a Confirmation indicating where the requisition has been sent for approval.



6. If you need to forward paper supporting documentation, select **Home** tab to return to the Internet Procurement homepage. Under **Requisitions at a Glance**, click on the appropriate requisition number link. This will open the **View Requisitions Details** screen. Print this screen. Attach the paper documentation to the screen shot and manually forward both to the authorized Approver.

Entering Check Requests

Scope

This procedure covers the creation of a check request (previously referred to as a billhead or request for payment).

Generally, the University procures and pays for goods or services through the use of a purchase order. Occasionally, there are circumstances under which a payment is required, but for which the issuance of a purchase order is either inappropriate or unnecessary. The following types of payments may be made using a properly completed check request:

1. Petty Cash Reimbursements (Refer to University Regulations and Procedures Manual (UR&PM) Book 6, Section 6.1.7)
2. Certain Payments to Individuals (Refer to UR&PM Book 6, Section 6.1.4)
3. Certain Statutory or Regulatory Obligations (e.g. payroll taxes, property taxes, etc.)
4. Conference Registration Fees
5. Office Subscriptions (e.g. Chronicle of Higher Education, Wall Street Journal, etc.)
6. Membership Fees
7. Postage

The information requested on the check request is necessary to properly support the payment and, when applicable, capture information required by the Internal Revenue Service. Check requests should include a written explanation and/or the submission of documentation supporting the requested expenditure of University funds.

A check request is not be used to request employee travel advances. See Requesting Travel Advance procedure.



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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Catalogs Shopping Lists Non-Catalog Request

Non-Catalog Request

* Indicates a required field

Select Billing Method (if different than default)


Selected Billing Method **2. GOODS or SERVICES BILLED AS AN AMOUNT**
 Example: \$10,000 worth of miscellaneous supplies (No on-line receiving / Manual Certification if \$1,000 or more)

Click below to select a different Billing Method

> [Select 1. GOODS or SERVICES BILLED BY QUANTITY \(Default\)](#)
 Example: 10 books at \$25 each

> [Select \(Reserved for future use - Do not use\)](#)

Select a Supplier using the Flashlight (Required for Quick Orders and Check Requests)

Name 

Site

Supplier Address

NOTE: If the Supplier or Site is not found, you must complete a New Supplier Request Form and proceed with your Requisition by indicating the name of the new Supplier in the Note to Buyer field on the Enter Notes & Attachments screen.

Describe Your Item

* **Category**

* **Item Description**

* **Estimated Amount**

[Forms and Attachments](#)

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

1. Follow Step 1 – Non-Catalog procedure.

2. Confirm that the following are true:

- You have selected **Billing Method** *GOODS or SERVICES BILLED AS AN AMOUNT*
- You have chosen a valid supplier name and site
- You have chosen a “Check Request” category

Note: The **Category** *Check Request: Non-Resident Alien* must be selected if you are requesting payment to a Non-Resident Alien.

3. If any of the above criteria is not met, use the browser’s back button, to make the required modifications.

Enter the appropriate information once you receive the Special Item Information screen, then select **Done**.

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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Catalogs Shopping Lists Non-Catalog Request

Special Item Information

The item you selected requires additional information before it can be added to your Shopping Cart. Please enter the following information and press the **Done** button below when you are finished.

* Indicates a required field

Item Description	Unit	Price	Supplier
Honorarium for William Taylor Lecture	US Dollar	1.00	Taylor, William

CR Check Request

Information, if any, to be displayed on check stub

Done

Home | Shop | Requisition Status | My Profile | Shopping Cart | Help

4. On the Shopping Cart Contents screen, select the checkbox to the left of **Check Here for Quick Order and Check Request Only** No need to check this box if using RU Exchange Supplier.
5. Select **Proceed to Checkout**.
6. Follow Steps 2 through 3-Enter Delivery Information and Enter Billing Information
7. In Step 4 – Enter Notes and Attachments, if you will not be submitting paper supporting documents to the Disbursement Control office (e.g. for prepaid postage for a postage meter), select the checkbox directly under the **If check request, complete the following** heading. Enter an appropriate justification in a **Note to Approver**.

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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Checkout

Shopping Cart Delivery Billing **Notes** Approvers Review & Submit

Enter Notes & Attachments

* Indicates a required field


Describe your requisition

* Requisition Description

Click here to [automatically default the requisition description](#) based on the first line item's description. You can always edit this default.

If check request, complete the following

Check this box if you will **not** be submitting paper supporting documents to the Disbursement Control office. If not, provide justification in the "Note to Approver" box below.

Special Check Handling Instructions, if any 

Add notes and attachments

Note to Buyer

Note to Approver

Add Attachments

Attention To	Type	Description

[Clear Checkout Changes and Return to Shopping Cart](#) Continue

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- If you wish to indicate any special check handling instructions, enter the % in **Special Check Handling Instructions, if any**, select the flashlight icon, then click **Go**.
- Click **Select** to the left of the appropriate instruction. This will return you to the Enter Notes and Attachments screen.

Search and Select: Special Check Handling Instructions, if any

Choosing a value for the field is a two-step process. First, search for a value. Second, select a value from the search results.

Search

Enter search criteria and press the **Go** button to find values.

Check Request Special Check Handling Instructions Go

Search Results

Press the **Select** button to choose a value. If you can't find the value you want, try searching again with different criteria.

Previous 1 - 4 shown of 4 Next

Select	Check Request Special Check Handling Instructions
Select	Call department for check pick up
Select	Hold check for courier pick up
Select	Mail check back to department
Select	Send attachments with check

10. Complete Steps 5 and 6 – Review Approver List and Review and Submit for Approval.
11. If documentation is available to support the expenditure (e.g. conference registration form, membership dues notice or petty cash receipts), the documentation must be delivered or mailed to the designated Approver for review. The documentation must be attached to a screen print of the “**View Requisition Details**” screen for the check request. The screen shot contains the requisition number that will be used by the Approver and Disbursement Control to locate and match the document with the associated requisition in the system.

If for some rare and unusual reason, the original or underlying documentation can not be attached to the check request, documentation held at departmental locations must be retained for a period of ten (10) years and may be subject to examination by University officials and internal and external auditors.
12. If approved, the supporting documentation and the attached screen shot must be forwarded to Disbursement Control, where it will be matched with the check request to release payment and filed for retention.

Entering Quick Purchase Orders

Scope

This procedure covers the creation of a quick purchase order. A quick purchase order is used for purchases to external suppliers that do not exceed \$1,000 with a single transaction and a single invoice.

Quick purchase orders do not require a Buyer's review. As a reminder, quick purchase orders have the following restrictions and cannot be used to purchase:

1. Alterations or Repairs to Buildings
2. Blanket Orders
3. Building Graphics/Interior and Exterior – Other than University Standard
4. Carpet/Window Treatment
5. Consulting Services
6. Equipment Requiring Utilities Hook-Up
7. Equipment Supplier or Services from Non-Contract Supplier
8. Furniture – Other than University Standard
9. Hazardous Waste Disposal
10. Importation of Equipment
11. Cylinder Gas Purchases/Demurrage Charges
12. Inspection of Service of Fire Suppression Systems
13. Leases
14. Plaques and Monuments (Buildings)
15. Radioactive Materials

-
1. Follow the appropriate [Step 1 – Non-Catalog](#) or [Step 1 Oracle Exchange](#) procedure to begin creation of the requisition.
 2. Confirm that the following are true:

- The total of your requisition is \$1,000 or less
 - You have chosen a valid supplier name and site
 - You have not included items from any of the restricted categories listed above
3. If any of the above criteria is not met, use the browser's back button, if necessary and make the required modifications.
 4. On the Shopping Cart Contents screen, click on checkbox to the left of **Check Here for Quick Order and Check Requests Only No need to check this box if using a RU Exchange Supplier.**
 5. Click **Proceed to Checkout.**
 6. Follow Steps 2 through 6 for creating a requisition.

The screenshot displays the Rutgers Shopping Cart Contents page. At the top, there is a navigation bar with links for Home, Shop, Requisition Status, and My Profile. Below this is a progress bar with steps: Shopping Cart, Delivery, Billing, Notes, Approvers, and Review & Submit. The main content area is titled 'Shopping Cart Contents' and includes a section for 'Open Saved Cart'. A table lists the cart items:

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Bell Atlantic Cell Phone #234251		Each	1	198.00	198.00		1 Stop Camera & Computer	Great Neck-01
						update Total \$ 198.00			

Below the table, there is a link 'Return to Shopping' and a checked checkbox with the text: **CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY No need to check this box if using an RU Exchange Supplier.** There are two buttons: 'Save Cart' and 'Proceed to Checkout'. The 'Proceed to Checkout' button is highlighted with a callout box labeled '5'. Another callout box labeled '4' points to the checkbox.

7. Once your requisition has been approved, the Requisition Preparer will be emailed the Quick Purchase Order as an Adobe Acrobat attachment. This attachment is the final Quick Purchase Order containing the standard Rutgers terms and conditions.
8. Upon receipt of your approved Quick Purchase Order, choose one of the following:
 - Print Quick Purchase Order attachment to your local printer and mail/deliver to supplier
 - Print Quick Purchase Order attachment to your local printer and fax to supplier
 - Email Quick Purchase Order attachment to the supplier if they will accept email

Preparing an Internal Purchase Order for a Supplier not Reflected in RIAS

Scope

This procedure covers how to prepare the paper-based internal purchase order for an Internal Rutgers supplier not reflected in RIAS.

The most current listing of Rutgers internal suppliers in RIAS is available on the RIAS web site at <http://www.rias.rutgers.edu>

1. Obtain a paper-based internal purchase order through Material Services.
2. Prepare in typewritten form:
 1. Fill in department, address, and name of person requesting goods or services
 2. Indicate, by using check mark, if this is an internal blanket (D) or internal (I)
 3. Indicate date of request
 4. Indicate department account to be charged, including object code
 5. Indicate department/fund title (the name of the account to be charged)
 6. Insert total dollar amount of order
 7. Include the name and address of internal supply department
 8. A complete description of materials or services required, including item amounts, quantities, and total dollar value of the order must be included
 9. The internal order must be signed by an authorized individual
 10. Note the user department's phone extension
3. Retain copy 1 (originator's copy), forward copy 2 (university supplier department copy) direct to the department supplying the goods or services, forward copy 3 (business office copy) to your business manager, and send copy 4 (disbursement control copy) to Administrative Services Building, Busch Campus.

Requesting a Payment to be enclosed with a Purchase Order

Scope

This procedure covers requesting a payment to accompany a purchase order when required by the supplier.

1. Follow Steps 1 through 3 of creating a Non-Catalog procedure

Note: Do not indicate the requisition as a Quick Order.

2. In Step 4 – Enter Notes and Attachments, indicate in a **Note to Buyer** that a payment must accompany the purchase order, enter the amount of payment required and any other required information needed.

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RUTGERS

Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Checkout

Shopping Cart Delivery Billing **Notes** Approvers Review & Submit

Enter Notes & Attachments

* Indicates a required field

Describe your requisition

* Requisition Description Xerox Copier model number 12345 with additional
Click here to [automatically default the requisition description](#) based on the first line item's description. You can always edit this default.

If check request, complete the following

Check this box if you will **not** be submitting paper supporting documents to the Disbursement Control office. If not, provide justification in the "Note to Approver" box below.

Special Check Handling Instructions, if any

Add notes and attachments

Note to Buyer

Note to Approver

[Add Attachments](#)

Attention To	Type	Description
--------------	------	-------------

[Clear Checkout Changes and Return to Shopping Cart](#)

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

3. Continue with Steps 5 and 6 of creating a requisition

Note: Once the requisition is approved, the responsible buyer in UP&C will take the appropriate steps to have both the check and purchase order sent to the supplier. The payment that will be paid against the purchase order will be reflected in OFIS.

Creating Emergency Requisitions

Scope

This procedure covers how to make a placement of an emergency order with a supplier.

The university defines emergencies as life safety hazards, keeping vital equipment operative, or preventing the deterioration of an experiment. In those instances where there is a need to place an emergency order with a supplier directly, listed below are two methods, one for working hours (8:30 a.m. – 4:30 p.m. Monday through Friday) and one for non-working hours.

Emergency Purchase Orders and Assistance during Working Hours

Orders for \$1,000 or less

1. Create a Quick Order requisition in Internet Procurement. See Entering Quick Purchase Orders procedure for details.
2. Once your requisition has been approved, the Requisition Preparer will be emailed the Quick Purchase Order as an Adobe Acrobat attachment. This attachment is the final Quick Purchase order containing the standard Rutgers terms and conditions.
3. Upon receipt of your approved Quick Purchase Order, choose one of the following:
 - Print Quick Purchase Order attachment to your local printer and mail/deliver to supplier
 - Print Quick Purchase Order attachment to your local printer and fax to supplier
 - Email Quick Purchase Order attachment to the supplier if they will accept email.

Orders for more than \$1,000

4. Create a non-catalog requisition in Internet Procurement. See Step 1-Non-Catalog for creating a requisition procedure for details. In Step 4 – Enter Notes and Attachments, indicate in a **Note to Buyer**, that the order is an emergency with an explanation.
5. Contact your authorized approver to advise them to review the emergency requisition.
6. Upon approval, the approver contacts the responsible buyer in UP&C to provide him/her the requisition number for the emergency order.
7. The responsible buyer will then create an emergency purchase order as a priority the same day and send the purchase order to the supplier.

Note: Alternatively, you may wish to call the order in to the supplier and utilize a previously established blanket purchase order when applicable.

Emergency Purchase Orders and Assistance during Non-Working Hours

If a situation such as a life safety hazard, keeping vital equipment operative, or preventing the deterioration of an experiment occurs after normal working hours, departments may immediately make the necessary purchase(s) directly with the supplier (by phone or by pickup at the store). The University Procurement and Contracting department is to be contacted the next workday with the details (See steps 4 through 7 above). Because purchase order numbers are not generally available after normal work hours, individuals will place verbal orders with suppliers and advise that a purchase order is forthcoming. Follow-up procedures are the same as those outlined above. In case of an emergency, always contact directly the appropriate service department (Facilities, Police, Emergency Services, Housing, Dining Services, REHS or Transportation) to expedite the timely resolution of your problem.

Creating Requisitions with Charge Accounts from Different Organizations

Scope

This procedure covers how to prepare a requisition when the charge account(s) that will be indicated in the billing information will reference different organizations.

The Approver List displayed during the fifth step of the requisition creation process will display the Approver defined in the requisition approval hierarchy who has the authority to approve the requisition based upon all organizational values(s) indicated in the billing instructions and the total dollar amount of the requisition automatically. The default Approver who may be displayed is a University Procurement and Contracting individual (e.g. Kevin Lyons). The following steps must be adhered, to ensure the authorized Approvers of each organization have reviewed the requisition.

1. Follow the appropriate Steps 1 through 4 of creating of a requisition.
2. During Step 5 – Review Approver List, select **Add Another Approver/Reviewer**.

Review Approver List & Enter Justifications

Your requisition will be sent to the following list

Approver List

Click here to [change the first approver](#)

Sequence	Approver Name	Required?	
1	Jones, Eileen F	No	Delete
before 1	<input type="text"/>	No	Delete

3. Select **Sequence of Before χ (Where χ is the default Approver)**.
4. Enter search criteria using the % wildcard (e.g. %Smith%) in the **Approver Name** field for the first appropriate authorized approver for the organization indicated in your billing instructions, click the flashlight icon, then **Go**.

Note: A listing of all authorized Approvers for each organization and their approval limits can be found as a link in Internet Procurement or the RIAS web site at <http://www.rias.rutgers.edu>. Level 1 approval represents approval authority up to \$10,000 and Level 2 represents approval authority up to the departmental budget.

5

Search

Enter search criteria and press the **Go** button to find approvers.

Employee Name

Search Results

Press the **Select** button to choose an approver. If you can't find the value you want, try searching again with different criteria.

◀ Previous 1 - 1 shown of 1 Next ▶

Select	Employee Name	Employee E-Mail	Employee Number	Organization Name
<input type="button" value="Select"/>	Fehn, Bruce C	FEHN@RCI.RUTGERS.EDU	16049	10557 Associate VP Administration-RIAS

5. Click **Select** to the left of the individual you wish to add.
6. Repeat steps 2 through 5 for the Approver for each different organization you indicated in the billing instructions.
7. Follow the Step 6 – Review and Submit procedure to complete your requisition.

Creating Requisitions as a Level Two Approver

Scope

This procedure covers how to prepare a requisition as a Level Two Approver.

The Approver List displayed during the fifth step of the requisition creation process will display the Approver defined in the requisition approval hierarchy who has the authority to approve the requisition based upon all organizational values(s) indicated in the billing instructions and the total dollar amount of the requisition automatically. As a Level two Approver, the default Approver displayed will always be a University Procurement and Contracting individual (e.g. Kevin Lyons). The following steps must be adhered, to ensure the authorized Approvers of each organization have reviewed the requisition.

1. Follow the appropriate Steps 1 through 4 of creating of a requisition.
2. During Step 5 – Review Approver List, select **Add Another Approver/Reviewer**.

Review Approver List & Enter Justifications

Your requisition will be sent to the following list of approvers.

Approver List

Click here to [change the first approver](#)

Sequence	Approver Name	Required?	
1	Lyons, Kevin L	No	Delete
before 1	<input type="text"/>	No	Delete

Press the **Reset Approval List** button to undo any changes you've made to the Approval List.

3. Select **Sequence of Before χ (Where χ is the default Approver)**.
4. Enter search criteria using the % wildcard (e.g. %Smith%) in the **Approver Name** field for the first appropriate authorized approver for the organization indicated in your billing instructions, click the flashlight icon, then **Go**.

Note: A listing of all authorized Approvers for each organization and their approval limits can be found as a link in Internet Procurement or the RIAS web site at <http://www.rias.rutgers.edu>. Level 1 approval represents approval authority up to \$10,000 and Level 2 represents approval authority up to the departmental budget.

5

Search

Enter search criteria and press the **Go** button to find approvers.

Employee Name

Search Results

Press the **Select** button to choose an approver. If you can't find the value you want, try searching again with different criteria.

⊖ Previous 1 - 1 shown of 1 Next ⊕

Select	Employee Name	Employee E-Mail	Employee Number	Organization Name
<input type="button" value="Select"/>	Fehn, Bruce C	FEHN@RCI.RUTGERS.EDU	16049	10557 Associate VP Administration-RIAS

5. Click **Select** to the left of the individual you wish to add.
6. Repeat steps 2 through 5 for the Approver for each different organization you indicated in the billing instructions.
7. Follow the Step 6 – Review and Submit procedure to complete your requisition.

Requisition Status Inquiry

Scope

This procedure covers some of the common ways of gathering information about your requisition and purchase orders.

1. Select the **Requisition Status** tab. Notice this screen provides you with the **Requisition Number, Description, Total, Creation Date** and **Status** of your requisitions.

The screenshot shows the 'Last 10 Requisitions' page. Callout 2 points to the 'View' dropdown menu. Callout 3 points to the 'Sort by' dropdown menu. Callout 4 points to the 'Expanded Search' link.

View: Last 10 Requisitions [Go] Expanded Search

Click a requisition number link to see its details.

Last 10 Requisitions

Select requisition and... [Copy to Cart] [Cancel] [Withdraw] [Resubmit] [Receive]

Need to change a requisition that's already been submitted for approval? Withdraw it! [Learn more...](#)

Sort by: Creation Date [Ascending] [Descending] [Go]

Previous 1 - 10 Shown of 10 Next

Select	Requisition	Description	Total \$	Creation Date	Status
<input type="radio"/>	741	test one time address	50.85	22-JUN-2002	Approved
<input type="radio"/>	719	work supplies	157.50	22-JUN-2002	Approved
<input type="radio"/>	685	SHAKER_WTR BATH FRCE_RECIP120V	3651.96	21-JUN-2002	Approved
<input type="radio"/>	682	Trim Tap NC 5GAL Pail Master CHEM Tapping Fluid	715.00	21-JUN-2002	Approved
<input type="radio"/>	681	Computer monitor	295.00	21-JUN-2002	Approved

Requisition Status Descriptions include the following:

- In Process** Requisitions that are in the queue of the next person in the requisition approval hierarchy
- Approved** Requisitions that have been approved by an authorized Approver in the requisition approval hierarchy
- Cancelled** Requisitions that have been cancelled by the Preparer.
- Pre-Approved** Requisitions that have been approved by an authorized Approver in the requisition approval hierarchy and have been forwarded to another individual.
- Rejected** Requisitions that have been rejected by a Reviewer or Approver

2. Select your search criteria using the drop down next to **View** and select **Go**, or choose **Expanded Search** link.
3. If you wish to sort your search results, select your criteria using the drop down next to **Sort by**, select the **Ascending** or **Descending** radial button, then **Go**.
4. If you selected **Expanded Search**, enter your search criteria, then select **Go**. Remember to select from the list of values for fields denoted with a flashlight icon. Scroll down page to view your search results.

Expanded Search Basic Search

Requisition Created By

(e.g. Last Name, First Name)

Requisition Created

Requisition Status

Requisition Number

Requisition Description

Requester

(e.g. Last Name, First Name)

Supplier

4 [Search Tips](#)

Select	Requisition	Description	Total \$	Creation Date	Status
<input type="radio"/>	571	VCR	298.50	24-MAY-2002	Approved

5

5. To view requisition details, select either the link displayed under **Requisition** or **Description**. The **View Requisition Details** screen appears. To view additional information such as the billing information, select the **View** link.

View Requisition Details - This is not a valid Purchase Order

[View Approval History](#)

Requisition 571 (Approved) **Total \$ 298.50**

Created By **Smith, Tim**
 Creation Date **24-MAY-2002**
 Description **VCR**

Deliver To **Smith, Tim**
Rutgers, The State University of NJ
27 Road 1
Piscataway, NJ 08854-8031

Note To Approver **Please Check the natural account**
 Note To Buyer
 Quick Order / Check Request # **319**

Attention To	Type	Description
To Approver	Text	Information on VCR

Items

To view additional details for a line item, click its **View** link.

Line	PO Number	Item Description	Need By	Unit	Quantity	Price	Total \$
View 1	319	Sony VCR model #453704765-AS90	14-JUN-2002	Each	1	298.5	298.50
							Total \$ 298.50

5

7

View Requisition Details - This is not a valid Purchase Order

[View Approval History](#)

Requisition **571** (Approved)

Total \$ **298.50**

Created By **Smith, Tim**
Creation Date **24-MAY-2002**
Description **VCR**

Deliver-To **Smith, Tim**
Rutgers, The State University of NJ
27 Road 1
Piscataway, NJ 08854-8031

Note To Approver **Please Check the natural account**

Note To Buyer

Quick Order / Check Request PO # **319**

	Attention To	Type	Description
Attachments	To Approver	Text	Information on VCR

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
Hide	1	Sony VCR model #453784765-AS98	14-JUN-2002	Each	1	298.5	298.50

Item Description **Sony VCR model #453784765-AS98**

Special Info **None**

Item Number

Requester **Smith, Tim**

Category **Supplies, Equipment and Merchandise**

Deliver-To **LIV 4086**

Supplier **Ace Audio-Visual Company**

Need-By Date **14-JUN-2002**

Supplier Site **Woodside-01**

Supplier Contact

Contact Phone

Supplier Item Number

To Supplier

PO Number **319 (Approved)**

Buyer [Kevin Lyons](#)

Accounts	Number	Percent	Dept Activity 1	Dept Activity 2
	00-201234-10531-71000-000000-000	100.00		

	Attention To	Type	Description
Attachments			

Copy to Cart

- If approved, the purchase order number will be reflected next to **PO Number** found at the line item level of the **View Requisition Details** screen with the *Status Approved* following the number.

Note: If the requisition is a Quick Order or Check Request, a **PO Number** will be reflected next the **Quick Order/Check Request #** before it has may be approved. Once it has been approved, the Quick Order will be emailed back to the Preparer as an Adobe Acrobat document for issuance to the supplier.

- To view the approval history and who has the requisition in their queue, select the link **View Approval History** link. Use your browser's back button to return to the **View Requisition Details** screen.

[Requisition Status: Requisitions](#) > [Requisition Details](#) > View Approval History

Approval History for Requisition 571

Sequence	Approver	Action	Action Date	Notes
1	Smith, Tim	✓ Submitted	24-MAY-2002	Please Check the natural account
2	Smith, Tim	✓ Reserved	24-MAY-2002	
3	Smith, Tim	✓ Forwarded	24-MAY-2002	
4	Jones, Eileen F	✓ Approved	24-MAY-2002	Please Check the natural account

Shopping Cart Management

Scope

This procedure covers how to save, reopen, delete, combine, and replace shopping carts. A shopping cart is a container for all the items you have selected in the current session. You may save a shopping cart and return to it later. Saved shopping carts are considered Requisitions in progress and your shopping cart number will be the same as your requisition number.

To Save a Shopping Cart

1. Click **Save Cart** found on the Shopping Cart Contents page when preparing a requisition.

The screenshot shows the Rutgers Shopping Cart Contents page. At the top, there is a navigation bar with links for Home, Shop, Requisition Status, and My Profile. Below this is a progress bar with steps: Shopping Cart, Delivery, Billing, Notes, Approvers, and Review & Submit. The main content area is titled "Shopping Cart Contents" and includes an "Open Saved Cart" link. A table lists items in the cart:

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Footballs		Each	1	25.00	25.00			
					update	Total \$	25.00		

Below the table, there is a "Return to Shopping" link and a checkbox labeled "CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY". At the bottom, there are two buttons: "Save Cart" and "Proceed to Checkout". The "Save Cart" button is highlighted with a callout box containing the number "1".

2. Enter a description in the **Cart Description** field, then select **OK**.

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Log Off Shopping Cart Help

Home Shop Requisition Status My Profile

Shopping Cart

Shopping Cart Delivery Billing Notes Approvers Review & Submit

Save Cart

Enter a Cart Description and press the **OK** button when you're done.

* indicates a required field

* Cart Description

OK Cancel

Home | Shop | Requisition Status | My Profile | **Shopping Cart** | Help

3. You will receive a confirmation that your **shopping cart** has been saved.

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Log Off Shopping Cart Help

Home Shop Requisition Status My Profile

Shopping Cart

Shopping Cart Delivery Billing Notes Approvers Review & Submit

Confirmation

The shopping cart has been saved.

Shopping Cart Contents

Your shopping cart is empty.

To put something in your shopping cart, start by selecting the **Shop** tab or click the **Return to Shopping** link below.

You can also open a saved cart if you are ready to buy the items it contains:

► [Open Saved Cart](#)

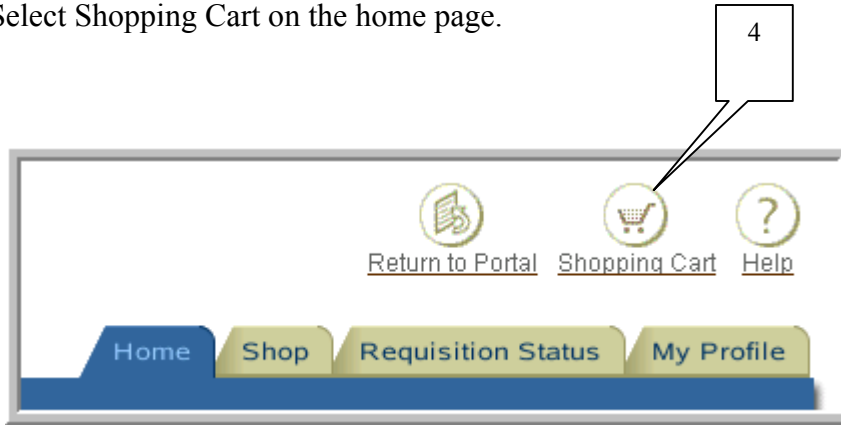
If you are trying to add items and don't think your cart should be empty, please contact your support administrator.

[Return to Shopping](#)

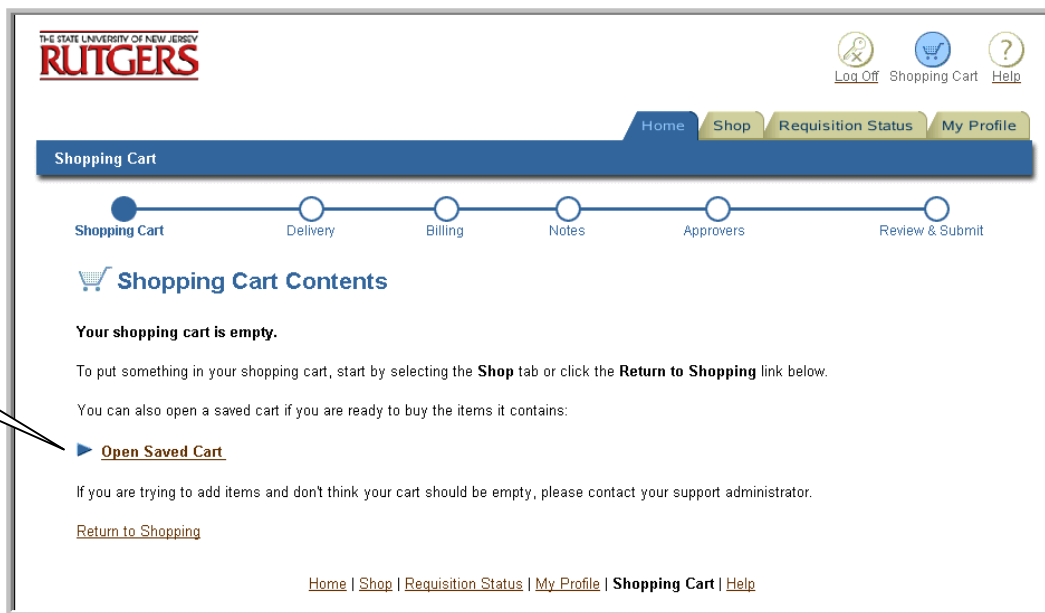
Home | Shop | Requisition Status | My Profile | **Shopping Cart** | Help

To Delete a Shopping Cart

4. Select Shopping Cart on the home page.



5. Select **Open Saved Cart**.



6. Select the cart you would like to delete by clicking on the radial button to the left of the requisition number and cart description. Click **Delete**.

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Log Off Shopping Cart Help

Home Shop Requisition Status My Profile

Shopping Cart

Shopping Cart Delivery Billing Notes Approvers Review & Submit

Saved Carts

Ready to buy the items in a saved cart? Select a saved cart and press the **Open** button to move its items to your shopping cart.

Select cart and...

Select	Requisition	Description	Creation Date	Total \$
<input type="radio"/>	622	Footballs	11-APR-2002	25.00
<input type="radio"/>	621	Footballs	11-APR-2002	25.00

Previous 1 - 2 Shown of 2 Next

Previous 1 - 2 Shown of 2 Next

Home | Shop | Requisition Status | My Profile | **Shopping Cart** | Help

Note: You may only delete one shopping cart at a time.

7. You will receive a warning message “Once this saved cart is deleted, it cannot be undone.” If you wish to continue, select **Yes**.

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Log Off Shopping Cart Help

Home Shop Requisition Status My Profile

Requisitions

Warning

Once this saved cart is deleted, it cannot be undone.
Do you still want to delete this saved cart?

Home | Shop | Requisition Status | My Profile | **Shopping Cart** | Help

- If yes was selected, you will receive a confirmation message **“The selected saved cart has been deleted.”**

8

The screenshot shows the Rutgers Shopping Cart interface. At the top left is the Rutgers logo. On the right, there are links for 'Log Off', 'Shopping Cart', and 'Help'. Below this is a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. A progress bar indicates the current step is 'Shopping Cart'. The main content area features a 'Confirmation' message: 'The selected saved cart has been deleted.' Below the message, it asks 'Ready to buy the items in a saved cart?' and provides an 'Open' button. A table lists saved carts with columns for 'Select', 'Requisition', 'Description', 'Creation Date', and 'Total \$'. One item is listed: Requisition 621, Description Footballs, Creation Date 11-APR-2002, Total \$ 25.00. At the bottom, there are navigation links: 'Home | Shop | Requisition Status | My Profile | Shopping Cart | Help'.

To Access a Saved Shopping Cart

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- Select **Shopping Cart** on the home page.

The screenshot shows the top navigation area of the Rutgers website. It includes three icons: 'Return to Portal', 'Shopping Cart', and 'Help'. Below these icons is a secondary navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. A callout box with the number '9' points to the 'Shopping Cart' link.

10. Select **Open Saved Cart**.

The screenshot shows the Rutgers Shopping Cart interface. At the top, there is a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. Below this is a progress bar with steps: Shopping Cart, Delivery, Billing, Notes, Approvers, and Review & Submit. A confirmation message states 'The shopping cart has been saved.' Below this, the 'Shopping Cart Contents' section indicates 'Your shopping cart is empty.' and provides instructions on how to add items. A button labeled 'Open Saved Cart' is highlighted with a callout box containing the number '10'. At the bottom, there is a footer with navigation links: Home | Shop | Requisition Status | My Profile | Shopping Cart | Help.

11. Select the cart you would like to open by clicking on the radial button to the left of the requisition number and cart description. Click **Open**.

Note: You may only open one shopping cart at a time.

The screenshot shows the Rutgers Shopping Cart interface with the 'Saved Carts' section. A message asks 'Ready to buy the items in a saved cart?' and instructs the user to select a cart and press the 'Open' button. Below this is a table of saved carts. A callout box containing the number '11' points to the first row of the table. The table has columns for 'Select', 'Requisition', 'Description', 'Creation Date', and 'Total \$'. At the bottom, there is a footer with navigation links: Home | Shop | Requisition Status | My Profile | Shopping Cart | Help.

Select	Requisition	Description	Creation Date	Total \$
<input type="radio"/>	623	Extension Cord	11-APR-2002	425.00
<input type="radio"/>	621	Footballs	11-APR-2002	25.00

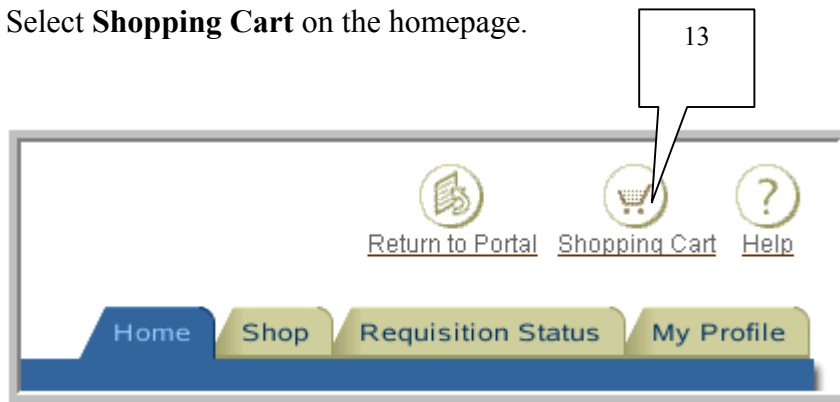
12. On the Shopping Cart Contents screen, click **Return to Shopping** to continue shopping or you may click on **Proceed to Checkout** to complete the requisition.

Note: If your shopping cart has been saved for a long period of time, remember to verify that your need-by date is still accurate.

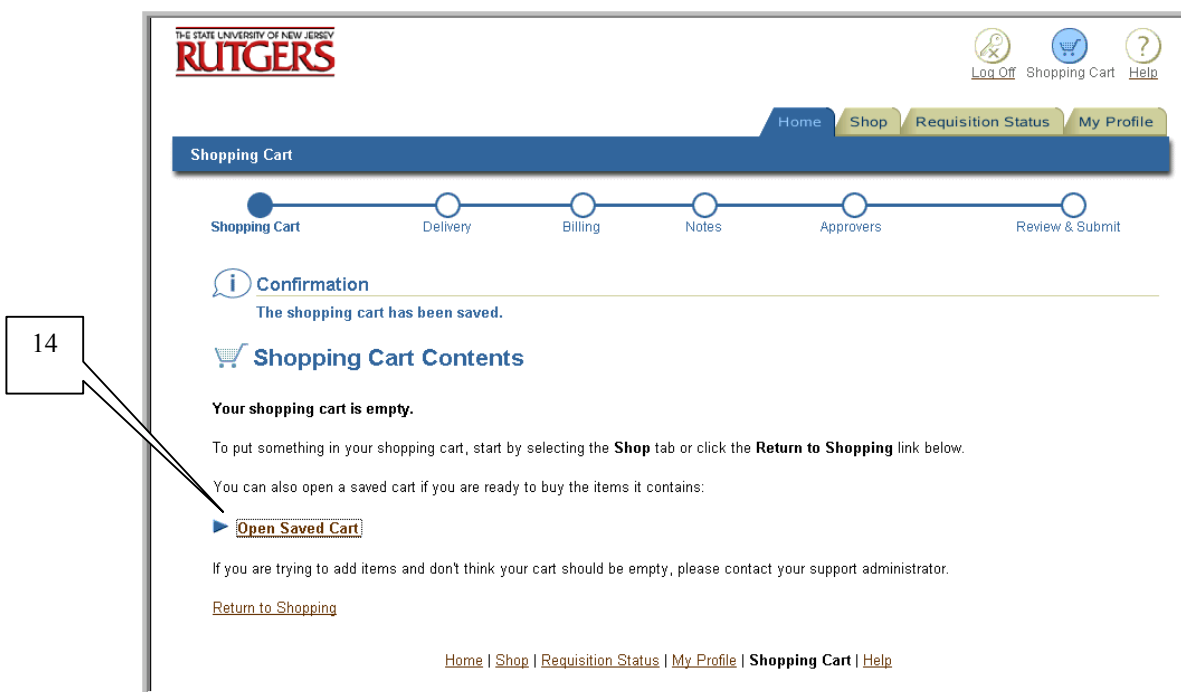
If your shopping cart has been saved for a long period of time, the price of your items may no longer be accurate. Verify the pricing information before proceeding to checkout.

To combine or replace a shopping cart

13. Select **Shopping Cart** on the homepage.



14. Select **Open Saved Cart**.



15. Select the cart you would like to open by clicking on the radial button to the left of the requisition number and cart description. Click **Open**.

Note: You may only open one shopping cart at a time.

The screenshot shows the Rutgers Shopping Cart interface. At the top, there is a navigation bar with links for Home, Shop, Requisition Status, and My Profile. Below this is a progress bar with steps: Shopping Cart, Delivery, Billing, Notes, Approvers, and Review & Submit. The main content area is titled "Saved Carts" and includes a prompt: "Ready to buy the items in a saved cart? Select a saved cart and press the Open button to move its items to your shopping cart." Below this prompt is a search bar labeled "Select cart and..." with "Open" and "Delete" buttons. A table lists two saved carts:




Select	Requisition	Description	Creation Date	Total \$
<input checked="" type="radio"/>	623	Extension Cord	11-APR-2002	425.00
<input type="radio"/>	621	Footballs	11-APR-2002	25.00

At the bottom of the page, there is a footer with navigation links: Home | Shop | Requisition Status | My Profile | Shopping Cart | Help.

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16. On the **Shopping Cart Contents** screen, select **Open Saved Cart**.


16

 [Log Off](#)
 [Shopping Cart](#)
 [Help](#)


Home | Shop | Requisition Status | My Profile

Shopping Cart

● Shopping Cart | ○ Delivery | ○ Billing | ○ Notes | ○ Approvers | ○ Review & Submit

 **Shopping Cart Contents**

[Open Saved Cart](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Extension Cord for PC projector		Each	1	425.00	425.00			
update						Total \$ 425.00			

To view new totals after updating quantities, click the [update](#) link.

[Return to Shopping](#)

CHECK HERE FOR QUICK ORDERS AND CHECK REQUESTS ONLY

Save the items in your cart and complete the checkout process at a later time.
[Learn more](#)

Easy step-by-step checkout lets you enter detailed delivery and billing instructions.

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

17. Select the cart you would like to combine by clicking on the radial button to the left of the requisition number and cart description. Click **Open**.

Note: You may only open one shopping cart at a time.

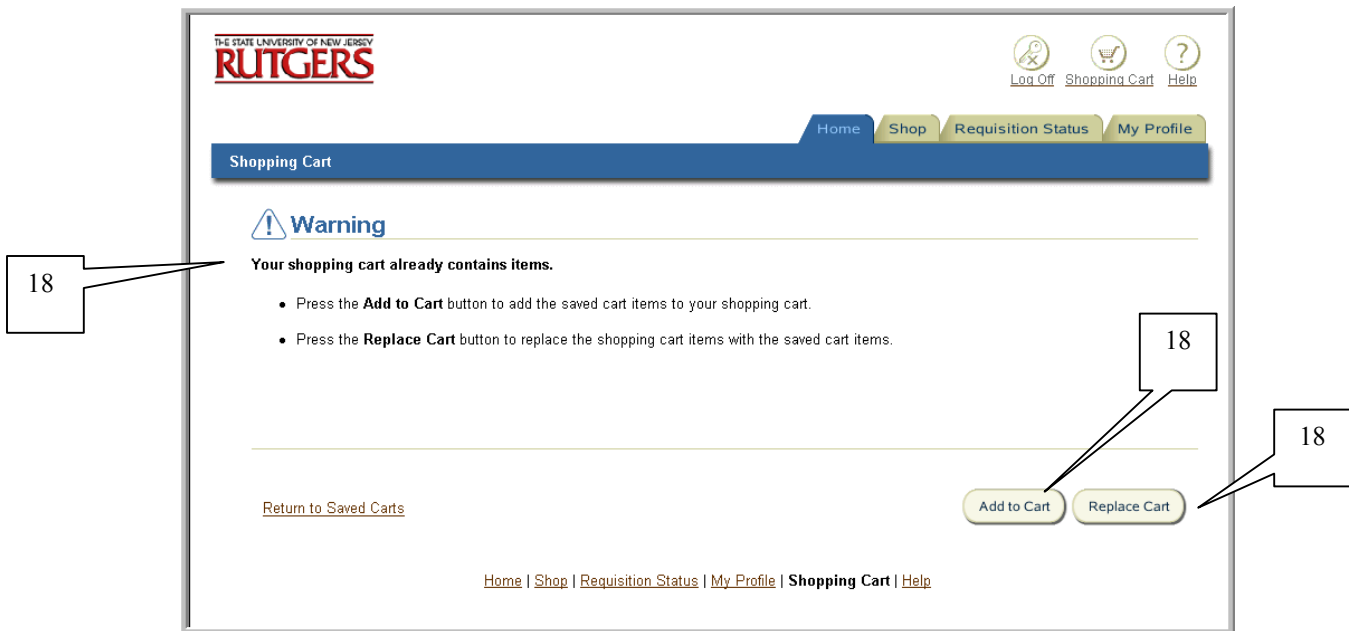
Select cart and...

⏪ Previous | **1 - 1 Shown of 1** | Next ⏩

Select	Requisition	Description	Creation Date	Total \$
<input type="radio"/>	1192	New Employees cart	29-MAY-2002	50.00

⏪ Previous | **1 - 1 Shown of 1** | Next ⏩

18. You will receive the following warning message “**Your shopping cart already contains items.**”



If you wish to add the saved cart items to your shopping cart, select **Add to Cart**.

If you wish to replace the shopping cart items with the saved cart items, select **Replace Cart**.

19. You will be returned to the **Shopping Cart Contents** screen. If you wish to add more items to your shopping cart, select **Return to Shopping** or click **Proceed to Checkout** to complete the requisition.

Note: If your shopping cart has been saved for a long period of time, remember to verify that your need-by date is still accurate.

If your shopping cart has been saved for a long period of time, the price of your items may no longer be accurate. Verify the pricing information before proceeding to checkout.

Editing Default Information in My Profile

Scope

This procedure covers editing your default profile information in Internet Procurement.

The screenshot shows the 'My Profile' page for Rutgers. The page has a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. The 'My Profile' section is active. Below the navigation bar, there is a 'My Profile' heading and a sub-heading 'Delivery Defaults'. The 'Delivery Defaults' section contains two required fields: 'Requester Name' (with the value 'Smith, Tim') and 'Deliver-To Location' (with the value 'LIV 4086'). A callout box labeled '1' points to the 'Requester Name' field. Below this is the 'Favorite Charge Accounts' section, which includes a table with columns: Line, Default, Charge Account, Future (00), Fund Source (Account), Organization, Natural Account, Future (000000), Future (000), and Delete. There are three rows in the table, each with a radio button in the 'Default' column and a trash icon in the 'Delete' column. A callout box labeled '3' points to the 'Favorite Charge Accounts' section. Below the table is an 'Add Another Row' button. At the bottom of the page, there is a 'Preferences' section with a 'Result Set Size' dropdown set to '10'. There are 'Apply Changes' and 'Clear Changes' buttons at the bottom right. The Rutgers logo is in the top left corner, and there are 'Exit', 'Shopping Cart', and 'Help' icons in the top right corner.

1

3

Line	Default	Charge Account	Future (00)	Fund Source (Account)	Organization	Natural Account	Future (000000)	Future (000)	Delete
1	<input type="radio"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
2	<input type="radio"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
3	<input type="radio"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

My Profile contains two sections: **Delivery Defaults** and **Favorite Charge Accounts**.

To change delivery defaults

1. Enter your search criteria using the wildcard (%) in **Requester Name**, then select flashlight icon. Select **Go**.
2. Click on **Select** to the left of the **Requester** you wish to use as your default.

- If you changed the **Requester** in the step above, the **Deliver-to-Location** will change to reflect the **Requester's** location. To change to another location, enter search criteria in **Deliver-to-Location** using the wildcard (%), then select flashlight icon. Select **Go**.
- Click on **Select** to the left of the **Deliver-to-Location** you wish to use as your default.
- If you wish to enter favorite charge accounts, continue to step 6. Otherwise, select **Apply Changes**.

To enter favorite charge accounts

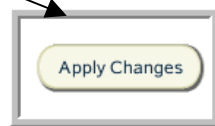
- Designate a charge account as your default by clicking on **Default** radial button next to the line number.
- Create a brief description for your charge account in **Charge Account**.
- Enter the appropriate values in **Fund Source**, **Organization** and **Natural Account**. Remember to enter the appropriate number of zeros in all the future segments.

The screenshot shows the 'Favorite Charge Accounts' form. It includes a table with columns: Line, Default, Charge Account, Future (00), Fund Source (Account), Organization, Natural Account, Future (000000), Future (000), and Delete. Three rows are visible. Callout 6 points to the 'Default' radio button for line 1. Callout 7 points to the 'Charge Account' field for line 1. Callout 9 points to the 'Add Another Row' button at the bottom of the table.

Line	Default	Charge Account	Future (00)	Fund Source (Account)	Organization	Natural Account	Future (000000)	Future (000)	Delete
1	<input checked="" type="radio"/>	State, Recruit	00	201234	10531	21000	000000	000	
2	<input checked="" type="radio"/>	Grant ERT Proj	00	421234	10531	21000	000000	000	
3	<input type="radio"/>								

Buttons: Add Another Row, Apply Changes

- Click **Add Another Row** for additional rows to add more charge accounts. To delete a favorite charge account, select garbage can icon on the line you wish to delete.
- Select **Apply Changes**.



My Favorites

Scope

This procedure covers creating, retrieving and deleting items in My Favorites List. My Favorites is a personalized shortcut you define to frequently requested items in Internet Procurement.

Non-catalog, internal and Oracle Exchange supplier items can be saved to My Favorites.

To create when using Non-Catalog

1. Click **Create Non-Catalog Request**. Complete the first step in creating a requisition when preparing a non-catalog request. See Step 1 – Non-Catalog procedure for further details.

The screenshot shows the Rutgers Non-Catalog Request form. The form is titled "Non-Catalog Request" and includes the Rutgers logo at the top left. The navigation bar includes "Home", "Shop", "Requisition Status", and "My Profile". The form is divided into several sections:

- Select Billing Method (if different than default):** This section has two options: "1. GOODS or SERVICES BILLED BY QUANTITY (Default)" and "2. GOODS or SERVICES BILLED AS AN AMOUNT". The first option is selected.
- Select a Supplier using the Flashlight (Required for Quick Orders and Check Requests):** This section includes fields for "Name" (Sports Authority), "Site" (PARAMUS-01), and "Supplier Address" (1 A & S Drive).
- Describe Your Item:** This section includes a "Category" dropdown (Equipment), an "Item Description" text area (Wilson Tennis Court Line Chalk (Lime), (item #62980-487) - For use on Grass and Clay Courts), a "Unit of Measure" dropdown (Each), a "Quantity" input field (5), and an "Estimated Unit Price" input field (26.53).

At the bottom of the form, there are buttons for "Forms and Attachments", "Clear All", "Add to Cart", and "Add to Favorites". A callout box with the number "2" points to the "Add to Favorites" button.

2. Click **Add to Favorites**. This will take you to the Items in My Favorites List screen.

- To sort your items, select criteria in **Sort by** using the drop down, select the appropriate radial button next to **Ascending** or **Descending**, then click **Go**.

The screenshot shows the Rutgers online procurement interface. At the top, there are navigation tabs for 'Home', 'Shop', 'Requisition Status', and 'My Profile'. Below this is a 'View' dropdown set to 'My Favorites List' and a 'Go' button. The main section is titled 'Items in My Favorites List'. It features a 'Select Item(s) and...' header with 'Add to Cart' and 'Delete' buttons. Below this is a 'Sort by' dropdown set to 'Supplier', with radio buttons for 'Ascending' and 'Descending', and a 'Go' button. There are also 'Select All' and 'Clear All' links. The main content is a table with columns: 'Select', 'Item Description', 'Item', 'Unit', 'Price', 'Supplier', and 'Supplier Site'. Two items are listed: 'Wilson Tennis Court Line Chalk (Lime)' and 'Xerox Color Copier toner Black'. Below the table, there are 'Select All', 'Clear All', 'Previous', '1 - 2 Shown of 2', and 'Next' links. At the bottom, there is a footer with navigation links: 'Home | Shop | Requisition Status | My Profile | Shopping Cart | Help'.

- To select a favorite item(s) to your shopping cart, click the individual **Select** box(es) to the left of each item description(s). The **Select All** link can also be used if you wish to select all items in your Favorites list. A check mark will denote the specific items you have chosen. To de-select items, click on the **Select** box to the left of the item description or use the **Clear All** link to remove all items marked. The checkmarks will be removed.

Note: Internal and Oracle Exchange supplier item descriptions will be underlined. If you click on the description of these items, the item detail will be displayed. Non-Catalog item descriptions will not be underlined.

- Click **Add to Cart** to continue the requisition process.

To create when using Internal Supplier

- Enter search criteria in **Find a Product** on your Internet Procurement homepage (or **Search** if you have selected another shopping link) using the % wildcard. Select **Go**.
- Review the listing of matched items. To view additional items, select the **Next** link on the bottom or top right of your screen, if displayed. To review previous items, select the **Previous** link.

The screenshot shows a search results interface. At the top, there is a search bar with the text "Search Results for %". Below the search bar, there are three buttons: "Add to Cart", "Add to Favorites", and "Compare". A callout box labeled "10" points to the "Add to Favorites" button. Below these buttons, there is a section for filtering and sorting. It includes a dropdown menu labeled "Filter Results or Sort by" with "-None -" selected, and two radio buttons for "Ascending" and "Descending". A "Go" button is next to the sorting options. A callout box labeled "8" points to the "Filter Results or Sort by" dropdown. Below the filtering section, there are links for "Select All" and "Clear All", and a pagination control showing "Previous", "1 - 10 shown of 13", and "Next". A callout box labeled "7" points to the "Add to Favorites" button. The main content is a table with the following columns: "Select", "Description", "Unit", "Unit Price", "Supplier", "Supplier Item", "Supplier Site", "Internal Item Number", "Contract Number", and "Category". The first row has a checked checkbox, "Mail and Document Services", "Each", "1.00", "IPO: Mail and Document Services", an empty "Supplier Item" cell, "MAIL & DOC SVCS", "21", "1", and "Category for Internal Purchase Order Suppliers". The second row has an unchecked checkbox, "Rutgers College Space and Catering", "Each", "1.00", "IPO: Rutgers College Campus Centers", an empty "Supplier Item" cell, "RC SPACE RENTAL", "22", "2", and "Category for Internal Purchase Order Suppliers". A callout box labeled "9" points to the "Select" checkbox in the first row.

8. If you wish to filter or sort your results, select **Filter Results** or **Sort by** criteria using the drop-down. Select either the **Ascending** or **Descending** radial button. Click **Go**.
9. Click the **Select** check box to the left of the item you wish to add to your requisition.
10. Select **Add to Favorites**. See step 3 through 5 to continue the requisition creation process.

To create when using Oracle Exchange Supplier

- Select the **More** link under **Shop Supplier Sites**. Click on **Exchange.Oracle.com**

The screenshot displays the Oracle Exchange Supplier website interface. At the top, the Oracle logo and 'Exchange.Oracle.com' are visible. A navigation bar includes 'Welcome', 'Shopping', 'Purchases', and 'Intelligence'. Below this is a search bar with the text 'water cooler 13.5%' and a 'Go' button. A callout box labeled '12' points to the search input field. To the right of the search bar are links for 'Advanced Search', 'Browse Categories', and 'Edit Search Options'. Below the search bar, the page shows 'Search Results for: water cooler 13.5' with a callout box labeled '17'. A row of buttons includes 'Select item(s) and...' (callout '14'), 'Add to Favorites', 'Add to Cart', 'Compare', and 'Check Availability'. Below this is a filter section with 'Filter Results or Sort by' set to '-None-' and 'Ascending' selected. A callout box labeled '13' points to the 'Add to Favorites' button. The main content is a table of search results with columns: Select, Supplier, Description, Unit, Price, Currency, Category, and Price Information. A callout box labeled '15' points to a row in the table. A callout box labeled '16' points to the table header. Below the table, there is a 'Didn't find it?' section and 'Category Matches' for 'Drinking fountains or bubblers'. At the bottom, there is a footer with copyright information and legal notices.

Select	Supplier	Description	Unit	Price	Currency	Category	Price Information
<input type="checkbox"/>	Grainger	Water Cooler, 13.5 Gallons Per Hour, Free Standing, Heavy Duty, 115 Volts, CFC Free	Each	444.18	USD	Drinking fountains or bubblers	
<input type="checkbox"/>	Grainger	Hasley Taylor Deluxe Water Cooler, 13.5 gallons per Hour, 28 inch eight	Each	470.25	USD	Drinking fountains or bubblers	
<input type="checkbox"/>	Grainger	Elkay Premium Compact Water Cooler, 13.5 gallons per hour	Each	479.28	USD	Drinking fountains or bubblers	
<input type="checkbox"/>	Grainger	Premium Vandal-Resistant Outdoor Floor Water Cooler, 13.5 gallons per hour, 1/3 horsepower	Each	950.00	USD	Drinking fountains or bubblers	
<input type="checkbox"/>	Grainger	Vandal-Resistant Outdoor Water Cooler, 13.5 gallons per hour, 1/5 horsepower	Each	760.48	USD	Drinking fountains or bubblers	
<input type="checkbox"/>	Grainger	Hasley Taylor Deluxe Water Cooler, 13.5 gallons per Hour, 40 inch eight	Each	472.86	USD	Drinking fountains or bubblers	

- Enter search criteria in **Search** field using the % wildcard. You may search either by supplier name, item number or description. Select **Go**.

Note: You must enter at least one character with the % wildcard to execute a search.

13. Review the listing of matched items. To view additional items, select the **Next** link on the bottom or top right of your screen, if displayed. To review previous items, select the **Previous** link. Items denoted with a blue dot that **Indicates Negotiated Prices** does not reflect Rutgers discount pricing.
14. If you wish to filter or sort your results, select **Filter Results** link or **Sort by** criteria (Description, Supplier or Category) using the drop-down box. Click **Go**.
15. If your item is reflected, click **Select** check box to the left of each item you wish to add to your requisition.
16. If your item is not displayed, check and/or modify your search criteria and repeat the above steps. If your item is still not reflected, you may wish to create a non-catalog request. Refer to Step 1 – Non- Catalog procedure for details.

Hint. Click **Select All** link if you wish to select all items. Click **Clear All** link if you wish to deselect all items.

17. Select the **Add to Favorites**. See steps 3 through 5 to continue the requisition creation process.

To Retrieve

18. Select **My Favorites List** on the Internet Procurement Home Page.
19. To sort your items, select criteria in **Sort by** using the drop down, select the appropriate radial button next to **Ascending** or **Descending**, then click **Go**.
20. To add items to your shopping cart, see steps 4 and 5 to continue the requisition creation process.

18

The screenshot shows the Rutgers Internet Procurement Home Page. The page layout includes a top navigation bar with links for Home, Shop, Requisition Status, and My Profile. On the left, there is a search area with a 'Find a Product' box and a 'Go' button, along with links for 'Browse Categories', 'Browse Lists', and 'Shop Supplier Sites'. The 'Browse Lists' section includes a link for 'My Favorites List', which is highlighted by a callout box labeled '18'. Below this are links for 'Exchange, Oracle.com', 'Staples, Inc.', and 'more ...'. A 'Create Non-Catalog Request' link is also present. The main content area features 'Purchasing News' with a link to 'University Procurement Services', a 'To Do List' section with a notification about reassigning notifications, and a 'Requisitions at a Glance' table. The table lists requisitions with their descriptions, creation dates, and statuses. On the right, there is a welcome message for 'Tim Smith' and a 'new to Purchasing?' section with links for 'Frequently Asked Questions' and 'Purchasing policies'. A vertical 'purchasing process' diagram is also visible on the right side.

Requisition	Description	Creation Date	Status
571	VCR	24-MAY-2002	Approved
582	9/26/2002	24-MAY-2002	In Process
560	training w...	24-MAY-2002	In Process
559	Subscripti...	24-MAY-2002	In Process
556	Hewlett Pa...	28-MAY-2002	In Process
more ...			

To Delete

21. Select **My Favorites List** on the Internet Procurement Home Page.
22. To sort your items, select criteria in **Sort by** using the drop down, select the appropriate radial button next to **Ascending** or **Descending**, then click **Go**.

The screenshot shows the Rutgers Internet Procurement system interface. At the top, there is a navigation bar with 'Home', 'Shop', 'Requisition Status', and 'My Profile'. Below this is a secondary navigation bar with 'Catalogs', 'Shopping Lists', and 'Non-Catalog Request'. The main content area is titled 'Items in My Favorites List'. It features a search bar with 'View My Favorites List' and a 'Go' button. Below the search bar, there is a 'Sort by' dropdown menu set to 'Supplier', with radio buttons for 'Ascending' (selected) and 'Descending', and a 'Go' button. A 'Select item(s) and...' bar with 'Add to Cart' and 'Delete' buttons is also present. The main list contains two items:

Select	Item Description	Item	Unit	Price	Supplier	Supplier Site
<input type="checkbox"/>	Wilson Tennis Court Line Chalk (Lime), (item #32980-487) - For use on Grass and Clay Courts		Each	26.53	Sports Authority	PARAMUS-01
<input type="checkbox"/>	Xerox Color Copier toner Black, #238883674		Each	48.95	Xerox Colorgrafx Systems	SAN JOSE-01

Callout box 22 points to the 'View My Favorites List' dropdown menu. Callout box 23 points to the 'Select' checkbox for the first item. Callout box 24 points to the 'Delete' button.

23. To delete favorite item(s) from your shopping cart, click the individual **Select** box(es) to the left of each item description(s). The **Select All** link can also be used if you wish to select all items in your Favorites list. A check mark will denote the specific items you have chosen. To de-select items, click on the specific individual **Select** box to the left of the item description or use the **Clear All** link to remove all items marked. The checkmarks will be removed.
24. Select **Delete**.

Requesting New/Update Suppliers and Sites

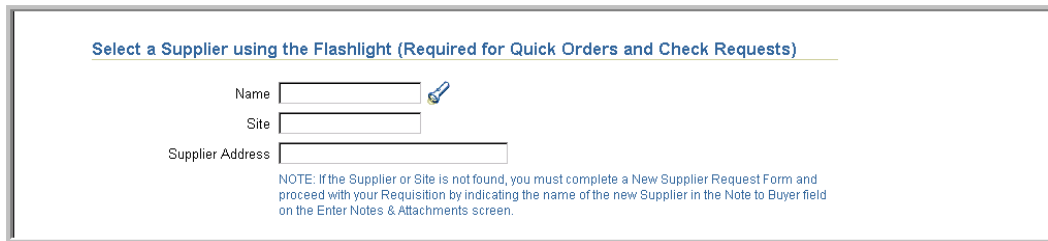
Scope

This procedure covers how to request new suppliers and/or new locations (sites) for an existing supplier.

To prepare either a check request or Quick Order, a valid supplier and site must be reflected on the requisition request. If the supplier/site is not reflected, the Requisition Preparer is responsible for completing a New/Change Supplier Request Form and submitting it to the appropriate office to be established before the Check Request or Quick Order is prepared.

If you are preparing a non-catalog request that is not a Check Request or a Quick Order and would like to suggest a supplier, you are not required to submit this request in advance of preparing your request. See Step 8 for further details.

1. Confirm that your supplier/site is not reflected in RIAS by first selecting the Non-Catalog Request link from Internet Procurement homepage.



The screenshot shows a web form titled "Select a Supplier using the Flashlight (Required for Quick Orders and Check Requests)". It contains three input fields: "Name" with a flashlight icon, "Site", and "Supplier Address". Below the fields is a note: "NOTE: If the Supplier or Site is not found, you must complete a New Supplier Request Form and proceed with your Requisition by indicating the name of the new Supplier in the Note to Buyer field on the Enter Notes & Attachments screen."

2. Enter search criteria using the % wildcard in the **Name** field, then click flashlight icon.

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Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Catalogs Shopping Lists Non-Catalog Request

Shop: Non-Catalog Request > Search and Select

Search and Select: Name

Choosing a value for the supplier field is a two-step process. First, search for suppliers. Second, select a supplier from the search results.

Search

Enter search criteria and press the **Go** button to find suppliers.

Search By:

3. You will be brought to the **Search and Select: Name** page. Select from the drop down list the criteria you wish to search by then click **Go**.
 - Supplier
 - Supplier Site
 - Supplier Address
4. If the supplier/site is not found and you have verified your search criteria, refer to the RIAS forms page on the RIAS web site at <http://www.rias.rutgers.edu> and select the New/Change Supplier Request Form. Copy the new form to your desktop using the **Save As** function.
5. Select **Cancel**, then **Clear All** to cancel the request in Internet Procurement.
6. Complete the New/Change Supplier Request Form that has been saved to your desktop.
 - If the new supplier/site is required for a Quick Order, email the completed form to University Procurement & Contracting at **procure@rci.rutgers.edu**.
 - If the new supplier/site is required for a check request, email the completed form to Disbursement Control at **payables@rci.rutgers.edu**.

The person submitting the request will be notified when the supplier/site has been established.

Note: For check requests and Quick Orders, this step must be completed before you prepare your request.

7. Upon notification that your supplier/site has been established, follow the appropriate steps on how to create a requisition.
8. If you are preparing a non-catalog request that is not a check request or a Quick Order and would like to suggest a supplier/site that is not reflected in RIAS, follow the steps below:
 - a) Refer to the RIAS forms page on the RIAS web site at <http://www.rias.rutgers.edu> and select the New/Change Supplier Request Form. Copy the new form to your desktop using the **Save As** function. Complete the New/Change Supplier Request Form that has been saved to your desktop.
 - b) Prepare and submit your non-catalog request with the following conditions:
 - The **Supplier Name/Site/Address** fields should be left blank.
 - Indicate in **Note to Buyer** that you are suggesting a supplier/site for this requisition and the new/change supplier request form is attached to the requisition.
 1. Select **Add Attachments** on Step 4-Enter Notes and Attachments
 2. Select **To Buyer** in **The Attention to** field
 3. Enter *New/Change Supplier Request* in **Description**
 4. Select **File** as your **Attachment Type**
 5. Attach your completed New/Change Supplier Form using the **Browse...** button

Upon receipt, the buyer will have the recommended supplier/site established prior to converting your requisition into a purchase order.

Requisition – Withdrawal, Cancel and Resubmit

Scope

This procedure covers the withdrawal, cancel and resubmit process for a previously submitted requisition.

The withdrawal feature enables you to retrieve a requisition from its approval process, make changes if necessary and resubmit for approval. The cancel feature enables you to liquidate a requisition commitment on OFIS. The resubmit feature enables you to submit a requisition that had been previously rejected or returned.

1. Click **Check Requisition Status**.

1

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Exit Shopping Cart Help

Home Shop **Requisition Status** My Profile

Requisitions Notifications Receiving Approvals

View Last 10 Requisitions Go Expanded Search

Click a requisition number link to see its details.

Last 10 Requisitions

Select requisition and... Copy to Cart Cancel Withdraw Resubmit Receive

Need to change a requisition that's already been submitted for approval? Withdraw it! [Learn more...](#)

Sort by Creation Date Ascending Descending Go

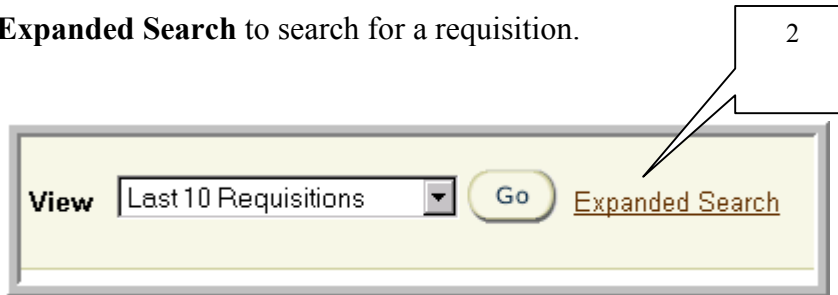
Select	Requisition	Description	Total \$	Creation Date	Status
<input type="radio"/>	312	Xerox Copier model number 12345 with additional stapler attachment number 232	10000.00	23-MAY-2002	In Process

Previous 1 - 1 Shown of 1 Next

Previous 1 - 1 Shown of 1 Next

Home | Shop | **Requisition Status** | My Profile | Shopping Cart | Help

2. Select **Expanded Search** to search for a requisition.



3. **Requisition Created** will default to *Today*. Use the drop down to select the appropriate timeframe.

A screenshot of the "Expanded Search" form. At the top, there are two tabs: "Expanded Search" (active) and "Basic Search". The form contains several input fields and dropdown menus: "Requisition Created By" (with a flashlight icon and a callout box labeled "3" pointing to it), "Requisition Created" (dropdown menu set to "Today"), "Requisition Status" (dropdown menu set to "Any"), "Requisition Number", "Requisition Description", "Requester" (with a flashlight icon), and "Supplier" (with a flashlight icon). At the bottom, there is a "Go" button and a "Search Tips" link. A callout box labeled "4" points to the "Go" button.

4. Enter additional search criteria in any of the remaining fields displayed, then select **Go**.

Remember to use the wildcard (%) when searching for values in list of values for fields denoted with a flashlight icon.

5. Scroll down page. The requisitions that meet your search criteria will be displayed.

Search Results: Requisitions

Select requisition and... Copy to Cart Cancel Withdraw Resubmit Receive

Sort by: Creation Date Ascending Descending Go

Previous 1 - 7 Shown of 7 Next

Select	Requisition	Description	Total \$	Creation Date	Status
<input type="radio"/>	571	VCR	298.50	24-MAY-2002	Approved
<input type="radio"/>	562	9/26/2002	127.38	24-MAY-2002	In Process
<input type="radio"/>	560	training workshop September 26, 2002	300.00	24-MAY-2002	In Process
<input type="radio"/>	559	Subscription	127.38	24-MAY-2002	In Process
<input type="radio"/>	556	Hewlett Packard Model XYZ Laser Printer	350.75	24-MAY-2002	In Process

- To sort your search results, select **Creation Date**, **Requisition Number** or **Status** using the drop down. Click on the **Ascending** or **Descending** radial button, then select **Go**.
- To view requisition details, click on the link displayed under **Requisition** or **Description**. To view the approval history of the requisition, click **Status**.

To withdraw a requisition

- Select the radial button to the left of the requisition number you wish to withdraw, then select **Withdraw**

Note: You may only withdraw one requisition at a time. If the requisition has been processed into a purchase order, the following message will appear “You cannot withdraw Requisition XYZ because one or more of its lines have been placed on a purchase order”. If you receive this error, see Preparing a Change Order to a Purchase Order procedure.

Requisition Withdraw (Requisition 989)

Indicate how you want to proceed after your requisition has been withdrawn from the approval process. Press the **Continue** button below to withdraw your requisition.

Withdraw and Checkout
Withdraw your requisition from the approval process and add it to the shopping cart so you can make changes and checkout.

Withdraw and Cancel
Don't need the items you ordered? Withdraw your requisition from the approval process and cancel it.

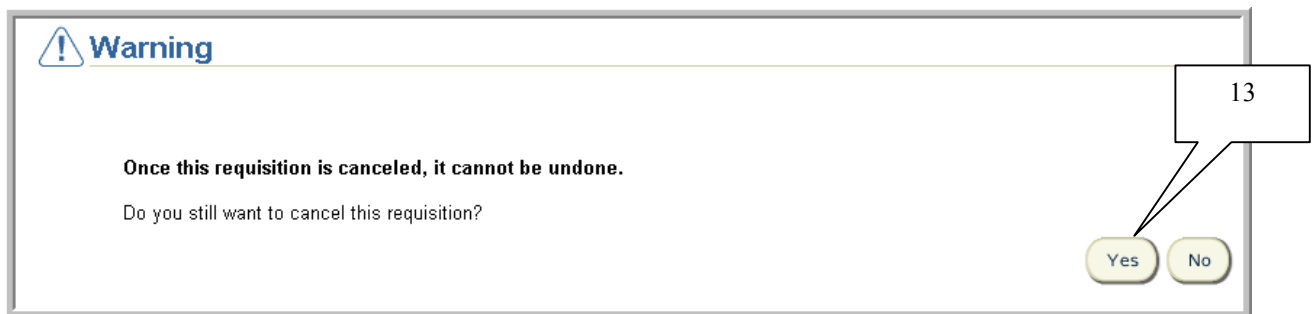
[Return to Orders](#) Continue

9. Select the radial button to the left of **Withdraw and Checkout** if you wish to retrieve and modify a requisition. Select the radial button to the left of **Withdraw and Cancel** to retrieve and cancel a requisition. Select **Continue**.
10. If **Withdraw and Checkout** was selected, proceed through each of the requisition steps, modifying any information required. Once **Submit** has been chosen on the last step, the requisition will be re-sent to the Approver.
11. If **Withdraw and Cancel** was selected, a confirmation that the selected requisition has been canceled will be displayed. The status of the requisition will change to **Cancelled**.

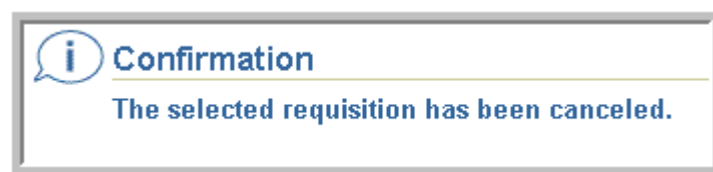


To cancel a requisition

12. Select the radial button to the left of the requisition number, then select **Cancel**. The below warning message will appear.



13. If you wish to continue, select **Yes**. Otherwise, select **No**. If **Yes** is selected, the below confirmation will be received. The status of the requisition will change to **Cancelled**.



To resubmit a requisition

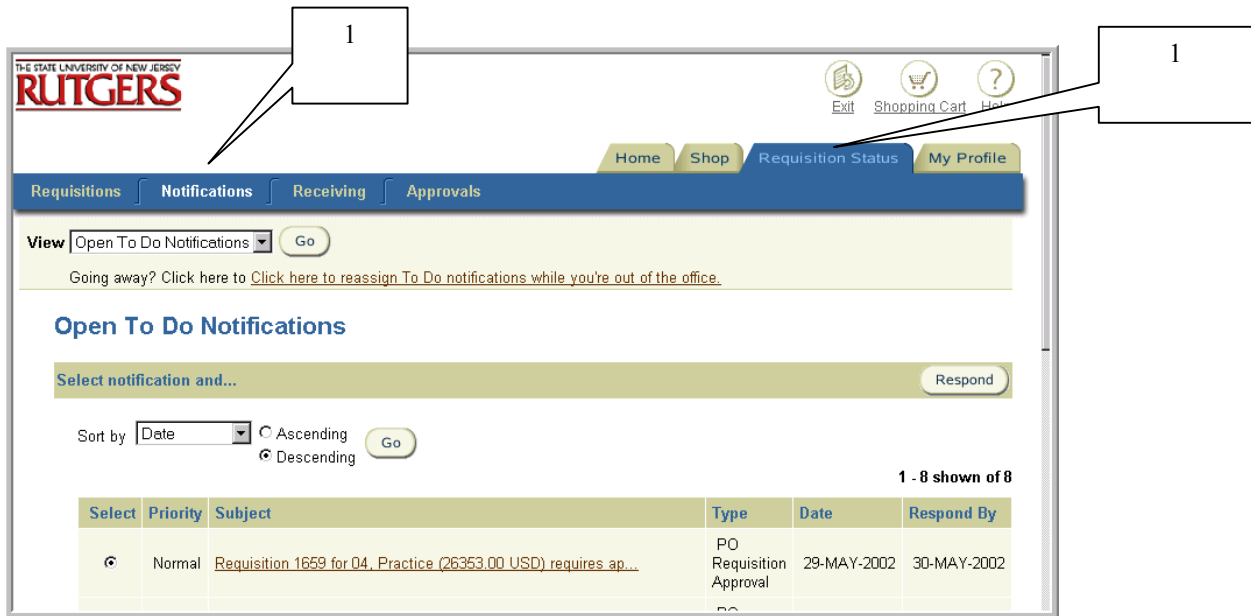
14. Select the radial button to the left of a requisition number that has the status **Rejected** or **Returned**, then select **Resubmit**. Proceed through each of the requisition steps, modifying any information required. Once **Submit** has been chosen on the last step, the requisition will be re-sent to the Approver.

Managing FYI Notifications

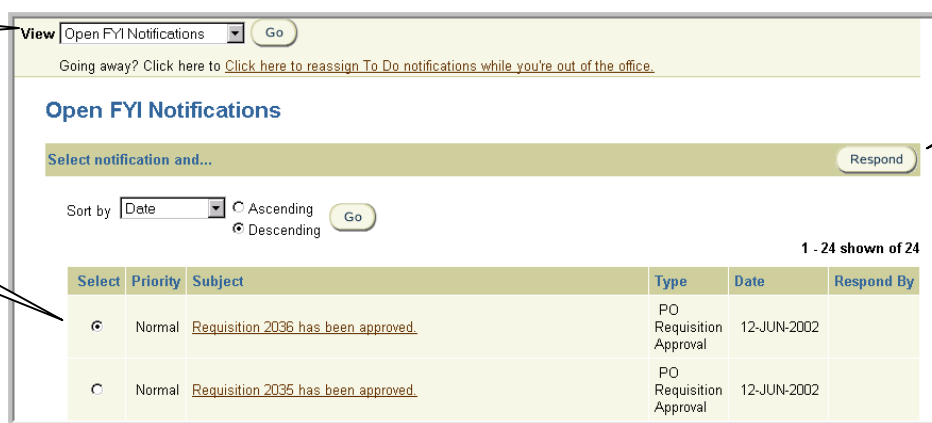
Scope

This procedure covers managing FYI notifications.

RIAS creates two types of notifications – “FYI” and “To Do”. “FYI” notifications are for informational purposes and do not require action, other than closing. “To Do” notifications require action on the part of the recipient.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.
2. Select **Open FYI Notifications** using the drop down next to **View**. Select **Go**.



3. Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down list (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

4. The Notifications Details window for the notification you selected will appear.

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **22-JUN-2002 16:30:14**
 Subject **Requisition 685 has been approved.**

Requisition Summary

Requisition Total	3651.96 USD
Description	SHAKER,WTR BATH FRCE RECIP120V
Created By	Markey, Eileen F
Justification	

Requisition Lines

The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	SHAKER,WTR BATH FRCE RECIP120V	VWR Scientific, Inc.	10531	Each	1	3651.96 USD	3651.96

Approval History

Sequence	Who	Action	Date	Note
5	Fehn, Bruce C	Approve	22-JUN-2002	
4	Stein, Timothy L	Approve	22-JUN-2002	
3	Markey, Eileen F	Forward	21-JUN-2002	
2	Markey, Eileen F	Reserve	21-JUN-2002	
1	Markey, Eileen F	Submit	21-JUN-2002	

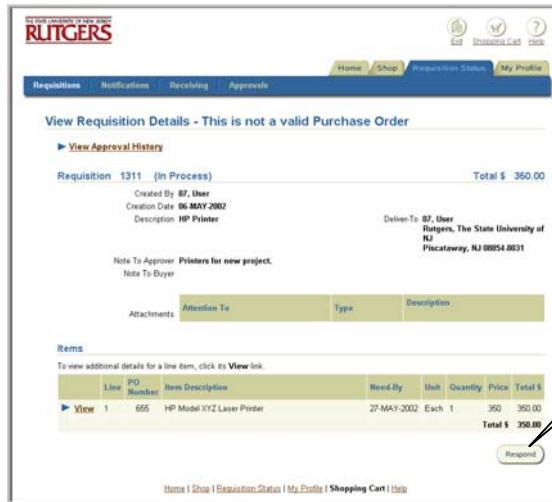
This notification does not require a response.

6

5

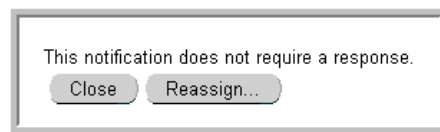
5. Confirm that the message line indicates that the notification does not require a response. If you wish to view the details of a notification concerning a requisition, continue to step 6. Otherwise, continue to step 8.
6. To view the details of a requisition, click on the **View Requisition Details** link. The View Requisition Details form will appear. Review the information displayed. To obtain more details on the requisition, select the **View** link displayed to the left of each line.

- When you are finished with your review, select **Respond**.



7

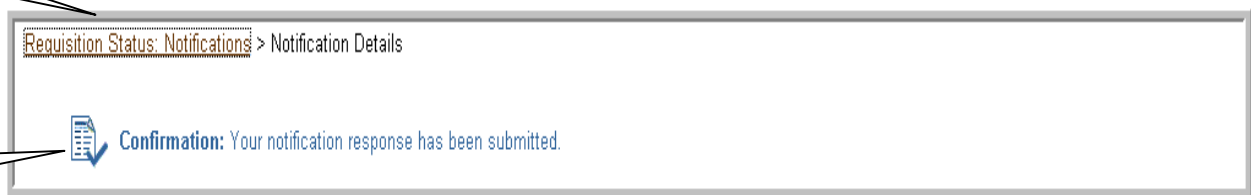
- Select **Close**. Do not use the Reassign button.



- Once you select **Close**, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.

- Select **Requisition Status: Notifications** link to return to your **Open FYI Notifications**.

10



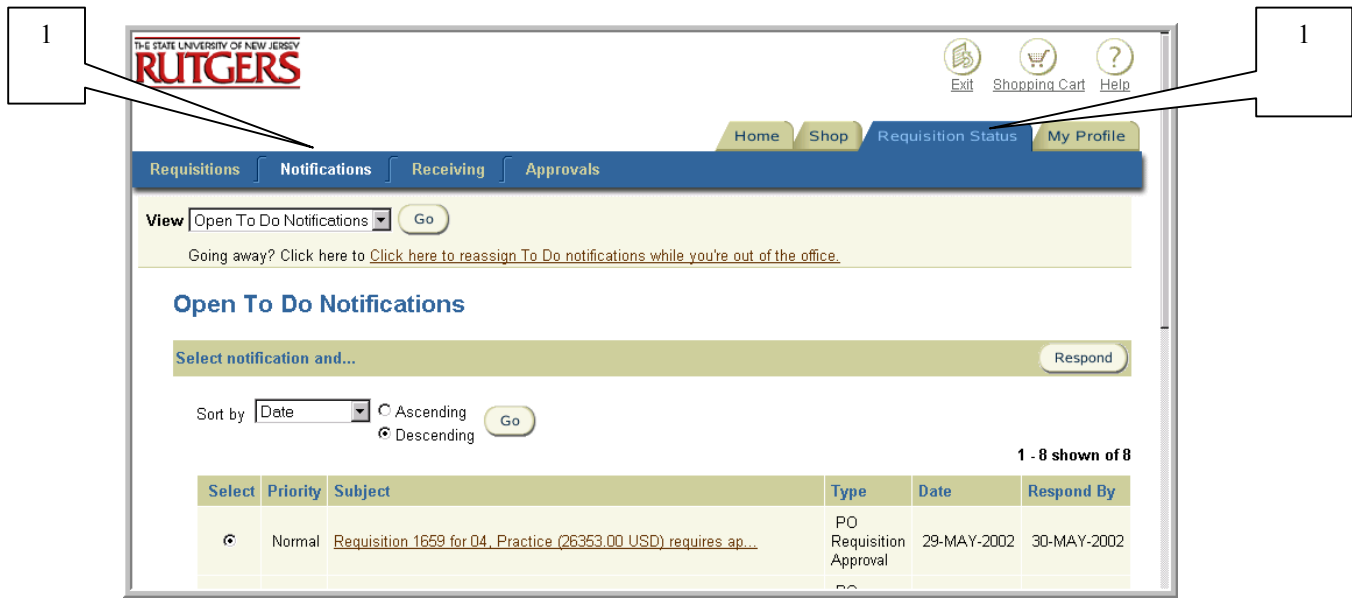
9

Managing To Do Notifications as a Reviewer

Scope

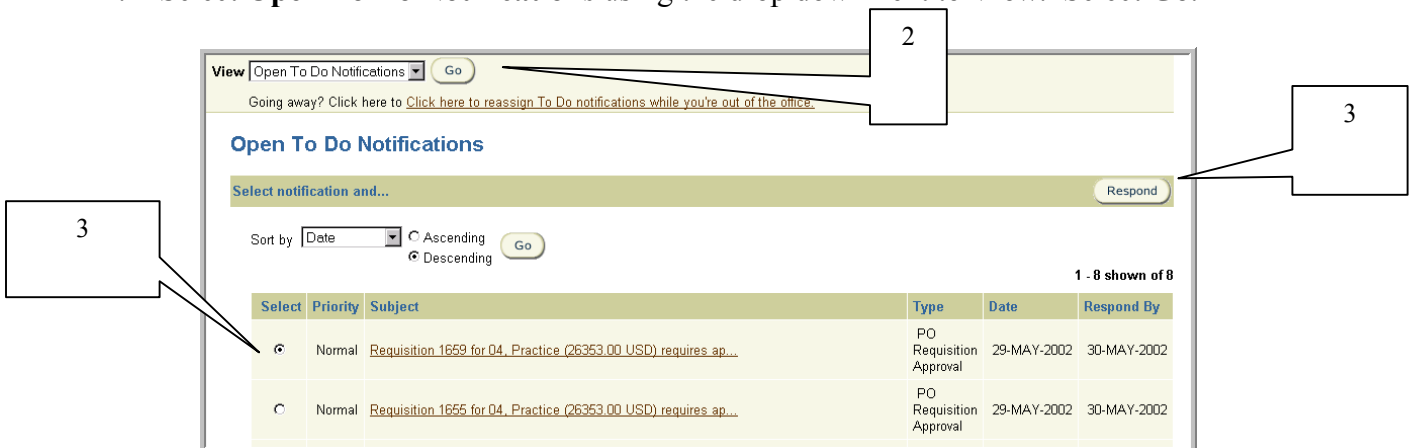
This procedure covers managing To Do notifications as a Reviewer. A Reviewer is an individual outside the Preparer's direct requisition approval hierarchy to whom a requisition has been forwarded for review. A Reviewer does not have final approval authority for that requisition.

RIAS creates two types of notifications – “FYI” and “To Do”. “FYI” notifications are for informational purposes and do not require action, other than closing. “To Do” notifications require action on the part of the recipient.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.

2. Select **Open To Do Notifications** using the drop down next to **View**. Select **Go**.



3. Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

4. The Notifications Details window for the notification you selected will appear. The Notifications Details window provides you with pertinent information about the requisition including requisition creation information, approval history and requisition summary and lines.

5

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29 JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To

Note

Approval Action

5. To view the details of a requisition, click **View Requisition Details** link.
6. The View Requisition Details screen will appear. Review the information displayed. To obtain more details such as the charging instructions, select the **View** link displayed to the left of each requisition line.

6

Items

To view additional details for a line item, click its **View** link.

	Line	PO Number	Item Description	Need-By	Unit	Quantity	Price	Total \$
▶ View	1		Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	18-JUL-2002	Each	1	342.70999	342.71

View Requisition Details - This is not a valid Purchase Order

[▶ View Approval History](#)

Requisition 1659 (In Process) Total \$ 26353.00

Created By **04, Practice**
 Creation Date **29-MAY-2002**
 Description **Lab 4 - Edit - Multi Org**

Deliver-To **04, Practice
 Rutgers, The State University of NJ
 21 Road 1
 Piscataway, NJ 08854-8031**

Note To Approver
 Note To Buyer
 Quick Order / Check Request PO #

Attachments

Attention To	Type	Description

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
▼ Hide	1	DC550 Mass Spectrometer	19-JUN-2002	Each	1	26353	26353.00

Item Description **DC550 Mass Spectrometer**
 Special Info **None**
 Item Number
 Category **Supplies, Equipment and Merchandise**
 Supplier **Varian Analytical Instruments**
 Supplier Site **Chicago-01**
 Supplier Contact
 Contact Phone
 Supplier Item Number
 To Supplier
 PO Number **811**
 Buyer [Lyons, Kevin L](#)

Requester **04, Practice**
 Deliver-To **LIV 4087**
 Need-By Date **19-JUN-2002**

Accounts

Number	Percent	Dept Activity 1	Dept Activity 2
00-424709-10299-71000-000000-000	26.562		
00-201234-10531-71000-000000-000	73.438		

Attachments

Attention To	Type	Description

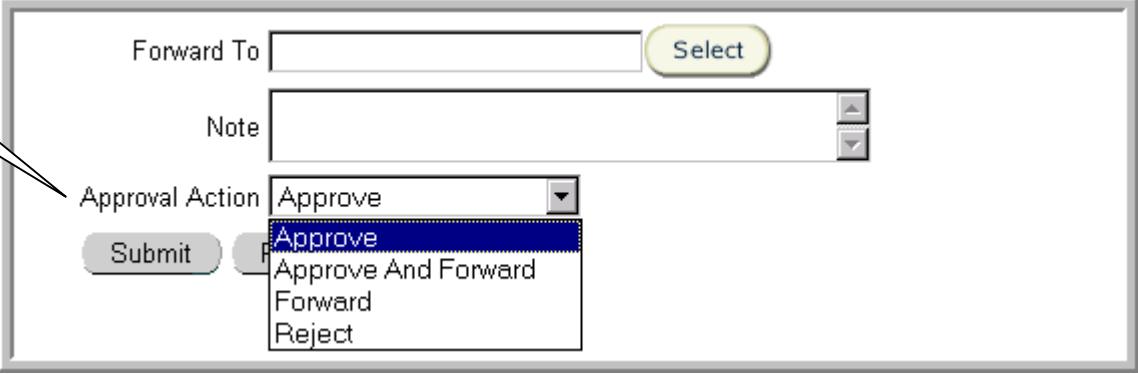
Approve Reject Respond

7

7. When you are finished with your review, select **Respond**. This will return you to the Notifications Details screen.

Note: If you select **Approve** or **Reject**, you will not be given the opportunity to write notes. Instead, you will just receive a confirmation that the requisition has been approved or rejected.

8. Scroll down page and select an Approver action. Optionally, you may enter comments in the **Note** field. **Do not use the Reassign button.**

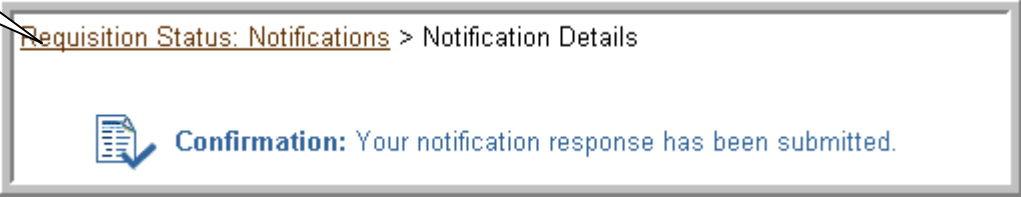


A screenshot of a web form for notification details. At the top, there is a 'Forward To' text box with a 'Select' button to its right. Below that is a 'Note' text area with vertical scroll arrows. The 'Approval Action' dropdown menu is open, showing options: 'Approve', 'Approve And Forward', 'Forward', and 'Reject'. The 'Approve' option is highlighted in blue. A 'Submit' button is located to the left of the dropdown menu. A callout box with the number '8' points to the 'Approval Action' dropdown.

As a Reviewer, the status of the requisition remains as **In Process** regardless of which action taken unless it has been rejected. If rejected, the requisition status would change to **Rejected** and be returned to the Preparer.

Reviewers are encouraged to only use **Approve** or **Reject** actions. If a Reviewer rejects a requisition, it is recommended that he or she enter a note explaining why the requisition has been rejected.

9. Once you have selected an action, click **Submit** to process.
10. Once you select an action, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.



A screenshot of a confirmation message. At the top, it says 'Requisition Status: Notifications > Notification Details'. Below that is a blue document icon with a checkmark, followed by the text 'Confirmation: Your notification response has been submitted.' A callout box with the number '11' points to the 'Requisition Status: Notifications' link.

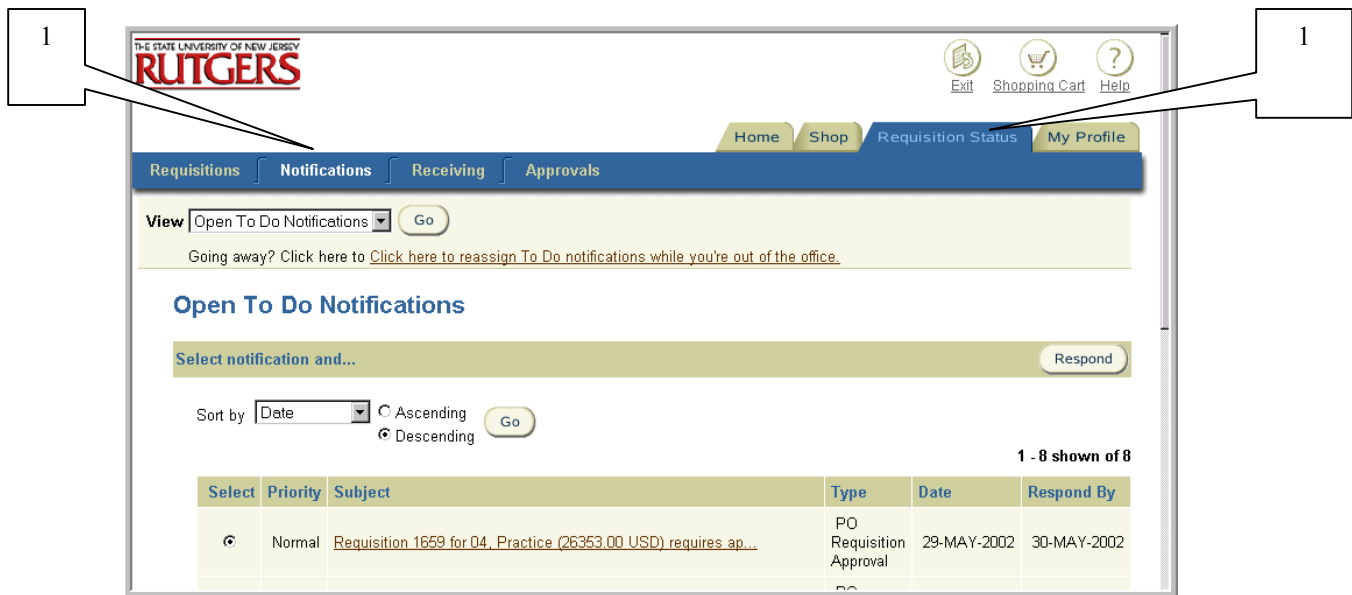
11. Select **Requisition Status: Notifications** link to return to your **Open To Do Notifications**.

Approving Requisitions as an Approver

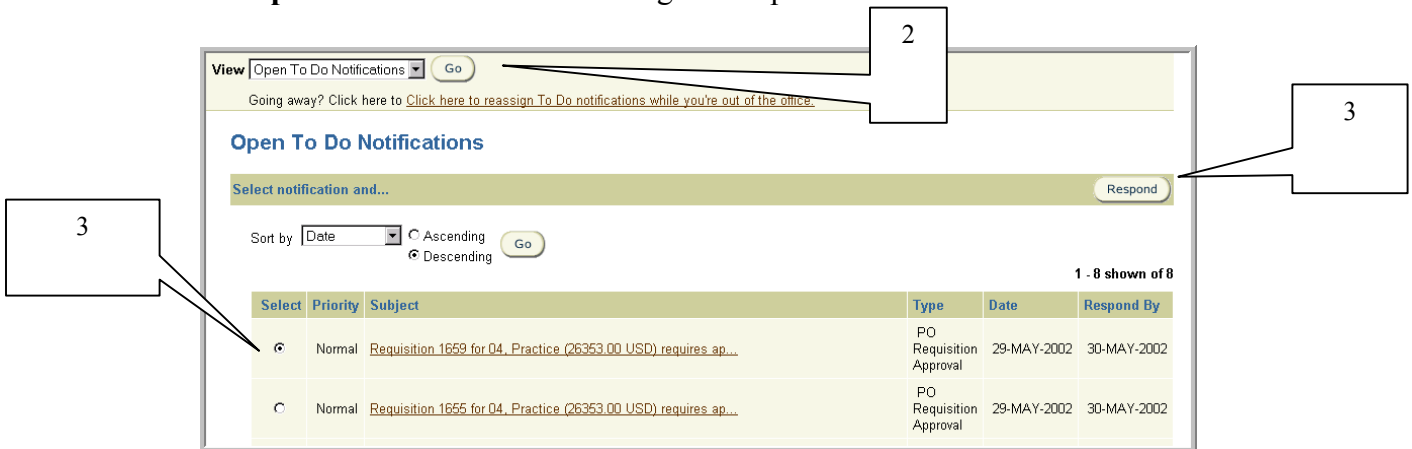
Scope

This procedure covers how to approve a requisition as an Approver.

RIAS creates two types of notifications – “FYI” and “To Do”. “FYI” notifications are for informational purposes and do not require action, other than closing. “To Do” notifications require action on the part of the recipient.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.
2. Select **Open To Do Notifications** using the drop down next to **View**. Select **Go**.



3. Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

4. The Notifications Details window for the notification you selected will appear. The Notifications Details window provides you with pertinent information about the requisition including requisition creation information, approval history and requisition summary and lines.

5

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29 JUN 2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To

Note

Approval Action

5. To view the details of a requisition, click **View Requisition Details** link.
6. The View Requisition Details screen will appear. Review the information displayed. To obtain more details such as the charging instructions, select the **View** link displayed to the left of each requisition line.

6

Items

To view additional details for a line item, click its **View** link.

	Line	PO Number	Item Description	Need-By	Unit	Quantity	Price	Total \$
▶ View	1		Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	18-JUL-2002	Each	1	342.70999	342.71

View Requisition Details - This is not a valid Purchase Order

[▶ View Approval History](#)

Requisition 1659 (In Process) Total \$ 26353.00

Created By **04, Practice**
 Creation Date **29-MAY-2002**
 Description **Lab 4 - Edit - Multi Org**

Deliver-To **04, Practice
 Rutgers, The State University of NJ
 21 Road 1
 Piscataway, NJ 08854-8031**

Note To Approver
 Note To Buyer
 Quick Order / Check Request PO #

Attachments

Attention To	Type	Description

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
▼ Hide	1	DC550 Mass Spectrometer	19-JUN-2002	Each	1	26353	26353.00

Item Description **DC550 Mass Spectrometer**
 Special Info **None**
 Item Number
 Category **Supplies, Equipment and Merchandise**
 Supplier **Varian Analytical Instruments**
 Supplier Site **Chicago-01**
 Supplier Contact
 Contact Phone
 Supplier Item Number
 To Supplier
 PO Number **811**
 Buyer [Lyons, Kevin L](#)

Requester **04, Practice**
 Deliver-To **LIV 4087**
 Need-By Date **19-JUN-2002**

Accounts

Number	Percent	Dept Activity 1	Dept Activity 2
00-424709-10299-71000-000000-000	26.562		
00-201234-10531-71000-000000-000	73.438		

Attachments

Attention To	Type	Description

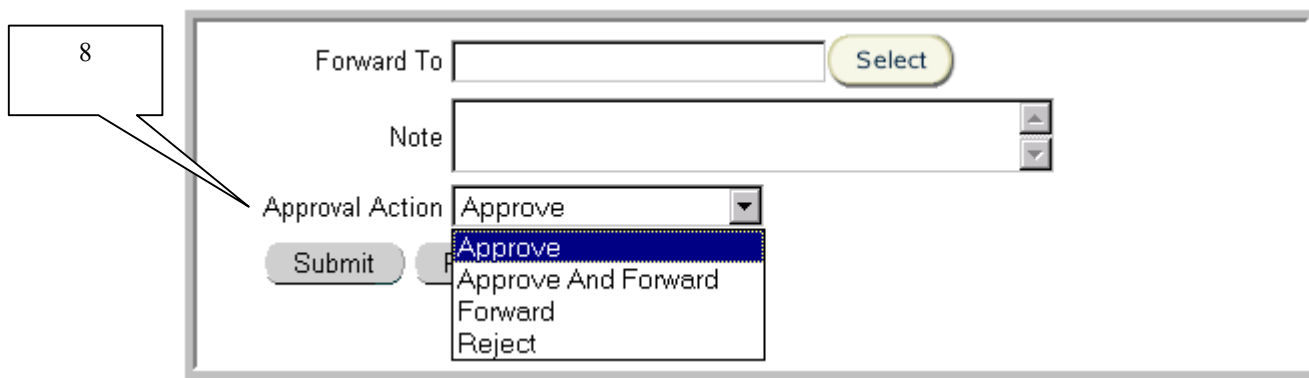
Approve Reject Respond

7

- When you are finished with your review, select **Respond**. This will return you to the Notifications Details screen.

Note: If you select **Approve** or **Reject**, you will not be given the opportunity to write notes. Instead, you will just receive a confirmation that the requisition has been approved or rejected.

- Scroll down page and select an **Approver Action**. Optionally, you may enter comments in the **Note** field. **Do not use the Reassign button.**



Action Taken	Upon Submission - Result of Action
Approve	Requisition status becomes Approved – Requisition eligible to become a purchase order.
Approve and Forward <u>with</u> An individual's name indicated in the Forward To field.	Requisition status becomes Pre-Approved . The individual that the requisition was forwarded to may perform any of the Approver Actions. If the individual edits the requisition, the requisition will return to the appropriate authorized Approver for approval.

Do not select the Approval Action of **Approve** and indicate an individual's name in the **Forward To** field since the requisition status will become **Approved** and the **Forward To** individual is ignored by the system.

Important: Approvers are responsible for ensuring that the following conditions are met (UR&PM Book 6, Section 6.1.2):

- The requisition is reasonable, appropriate and necessary in order to achieve the goals or outcomes of the particular University program, project or task. An Approver is expected

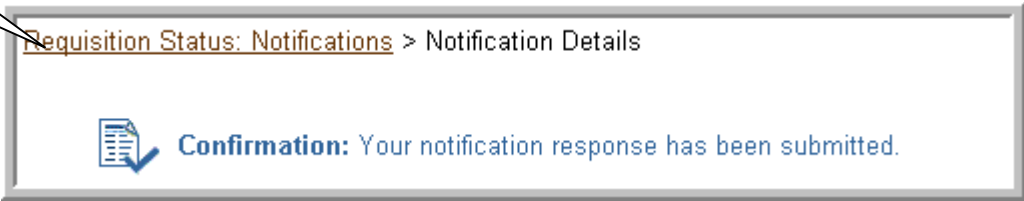
to exercise professional judgment and due diligence when determining if an expenditure is reasonable, appropriate and necessary.

- b) The account(s) charged have sufficient funds available to cover the requisition during the budget period or project period.

For further details, refer to Basic Expectations of Approvers in this manual.

9. Once you have selected an action, click **Submit** to process.
10. Once you select an action, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.

11



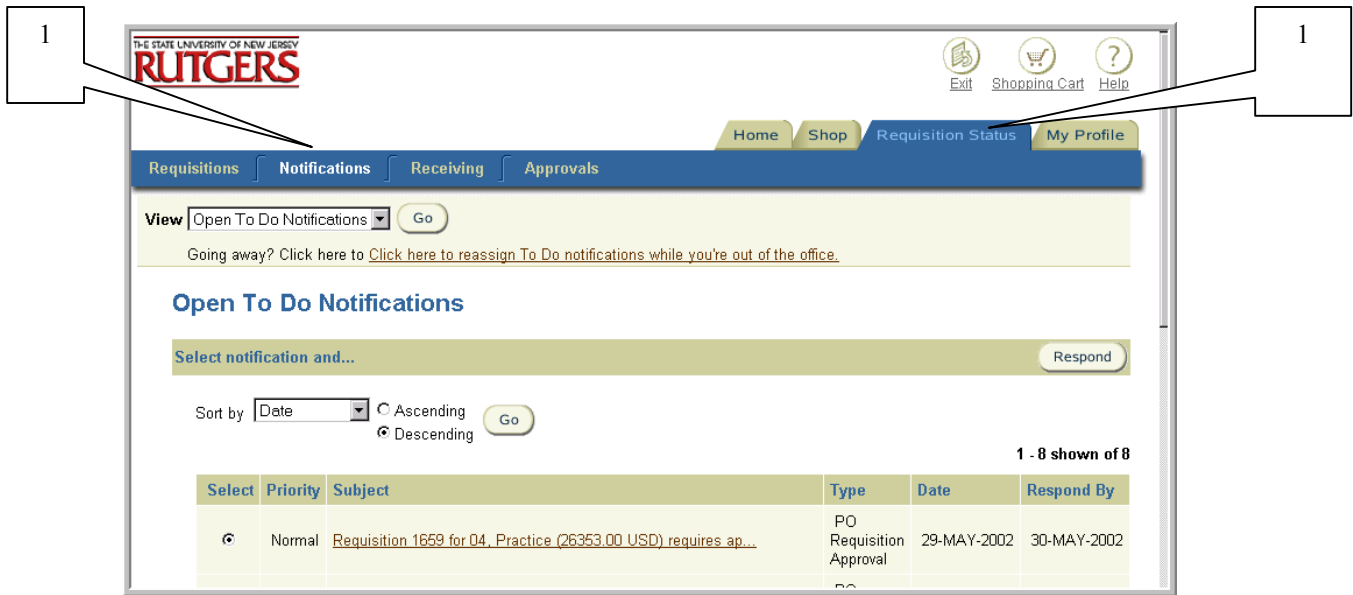
11. Select **Requisition Status: Notifications** link to return to your **Open To Do Notifications**.

Rejecting Requisitions

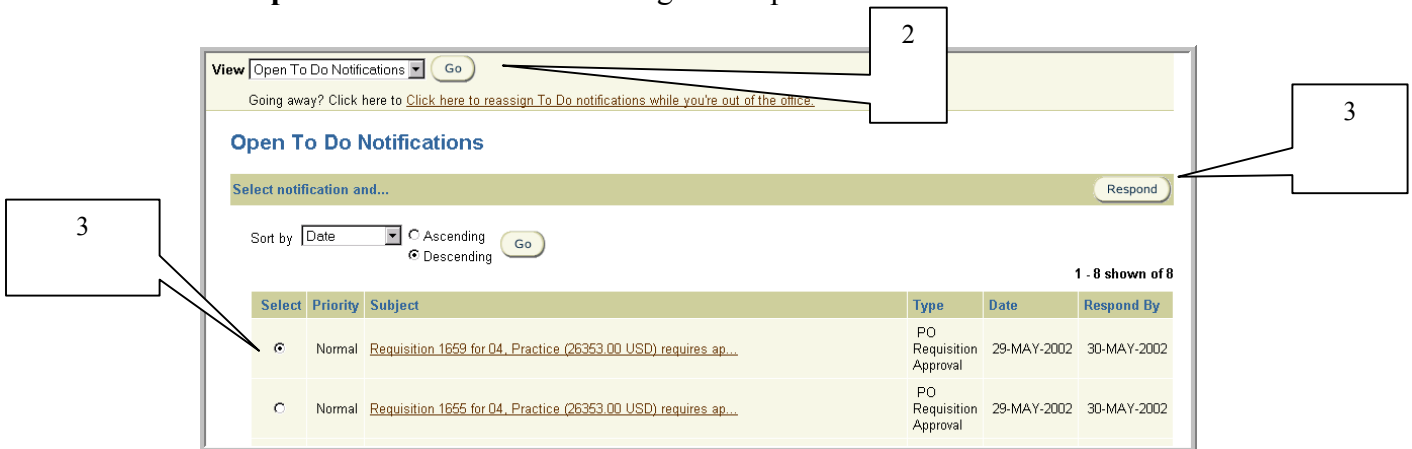
Scope

This procedure covers how to reject a requisition.

RIAS creates two types of notifications – “FYI” and “To Do”. “FYI” notifications are for informational purposes and do not require action, other than closing. “To Do” notifications require action on the part of the recipient.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.
2. Select **Open To Do Notifications** using the drop down next to **View**. Select **Go**.



3. Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

4. The Notifications Details window for the notification you selected will appear. The Notifications Details window provides you with pertinent information about the requisition including requisition creation information, approval history and requisition summary and lines.

5

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29 JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To

Note

Approval Action

5. To view the details of a requisition, click **View Requisition Details** link.
6. The View Requisition Details screen will appear. Review the information displayed. To obtain more details such as the charging instructions, select the **View** link displayed to the left of each requisition line.

6

Items

To view additional details for a line item, click its **View** link.

	Line	PO Number	Item Description	Need-By	Unit	Quantity	Price	Total \$
▶ View	1		Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	18-JUL-2002	Each	1	342.70999	342.71

View Requisition Details - This is not a valid Purchase Order

[▶ View Approval History](#)

Requisition 1659 (In Process) Total \$ 26353.00

Created By **04, Practice**
 Creation Date **29-MAY-2002**
 Description **Lab 4 - Edit - Multi Org**

Deliver-To **04, Practice
 Rutgers, The State University of NJ
 21 Road 1
 Piscataway, NJ 08854-8031**

Note To Approver
 Note To Buyer
 Quick Order / Check Request PO #

Attachments

Attention To	Type	Description

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
▼ Hide	1	DC550 Mass Spectrometer	19-JUN-2002	Each	1	26353	26353.00

Item Description **DC550 Mass Spectrometer**
 Special Info **None**
 Item Number
 Category **Supplies, Equipment and Merchandise**
 Supplier **Varian Analytical Instruments**
 Supplier Site **Chicago-01**
 Supplier Contact
 Contact Phone
 Supplier Item Number
 To Supplier
 PO Number **811**
 Buyer [Lyons, Kevin L](#)

Requester **04, Practice**
 Deliver-To **LIV 4087**
 Need-By Date **19-JUN-2002**

Accounts

Number	Percent	Dept Activity 1	Dept Activity 2
00-424709-10299-71000-000000-000	26.562		
00-201234-10531-71000-000000-000	73.438		

Attachments

Attention To	Type	Description

[Approve](#) [Reject](#) [Respond](#)

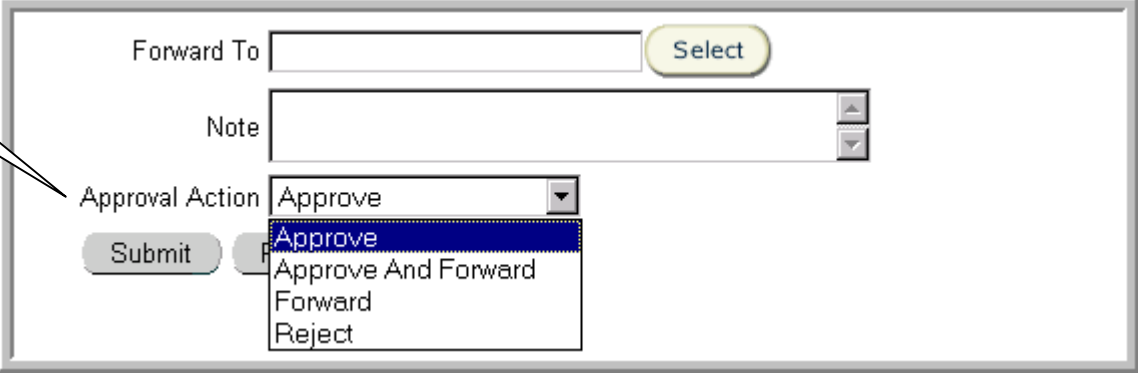
7

- When you are finished with your review, select **Respond**. This will return you to the Notifications Details screen.

Note: If you select **Approve** or **Reject**, you will not be given the opportunity to write notes. Instead, you will just receive a confirmation that the requisition has been approved or rejected.

- Scroll down page and select *Reject* as your **Approver Action**. Enter comments in the **Note** field explaining the reason for rejection of the requisition. **Do not use the Reassign button.**

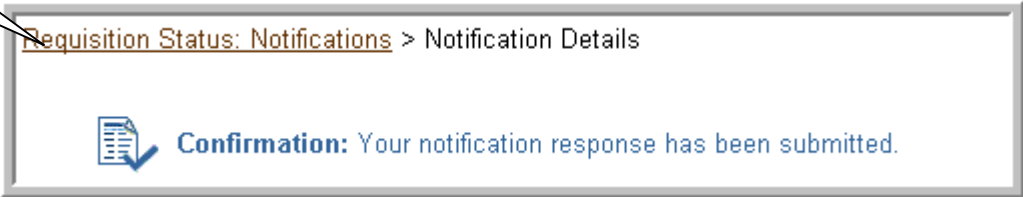
8



The screenshot shows a web form with the following elements: a 'Forward To' text box with a 'Select' button; a 'Note' text area; an 'Approval Action' dropdown menu with a blue highlight on the 'Approve' option; and a 'Submit' button. A callout box with the number '8' points to the 'Approval Action' dropdown.

- Once you have selected an action, click **Submit** to return the requisition back to the Preparer.
- Once you select an action, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.

11



The screenshot shows a confirmation message in a box. At the top, it says 'Requisition Status: Notifications > Notification Details'. Below that is a blue checkmark icon followed by the text 'Confirmation: Your notification response has been submitted.' A callout box with the number '11' points to the top of the confirmation box.

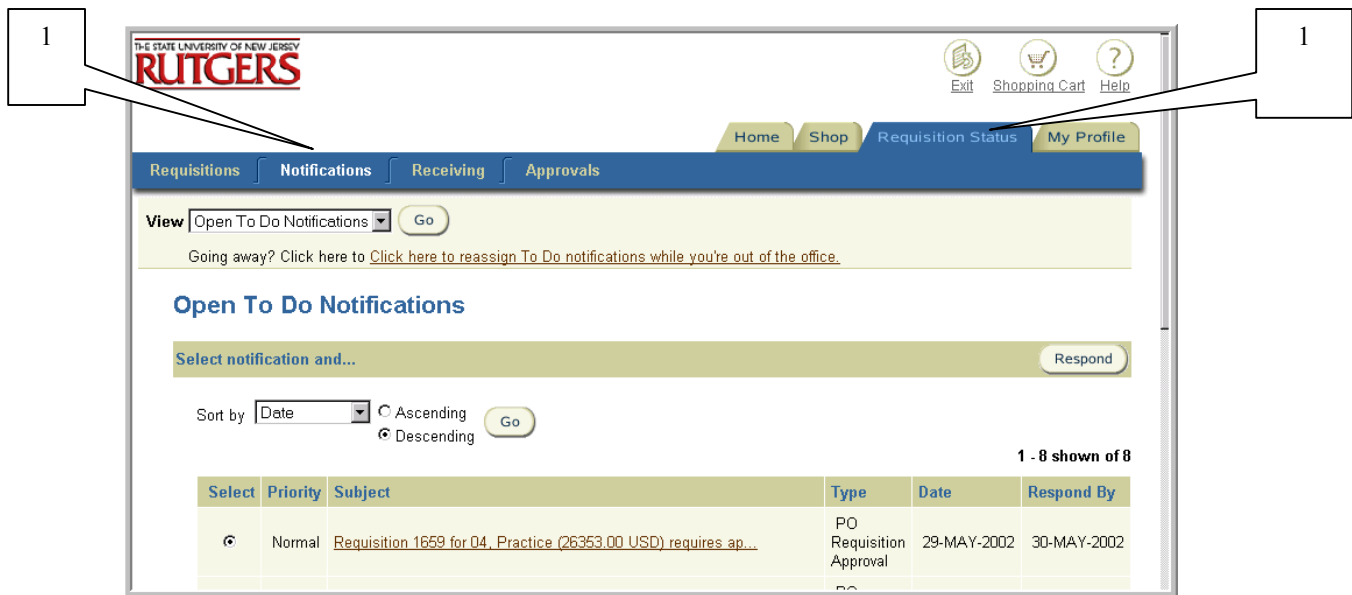
- Select **Requisition Status: Notifications** link to return to your **Open To Do Notifications**.

Forwarding Requisitions as an Approver

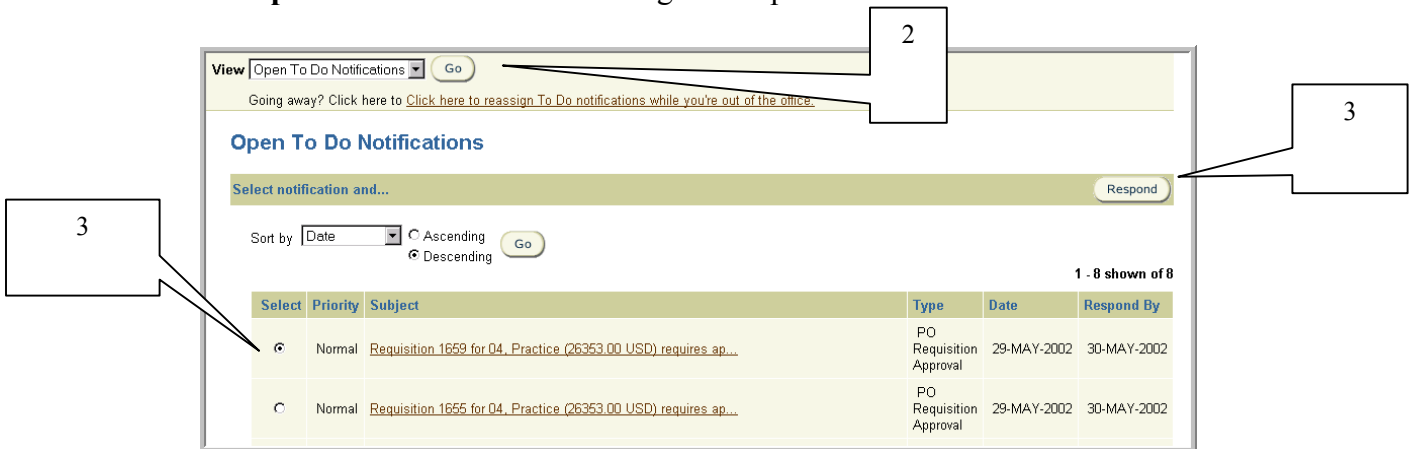
Scope

This procedure covers how to forward a requisition as an Approver.

RIAS creates two types of notifications – “FYI” and “To Do”. “FYI” notifications are for informational purposes and do not require action, other than closing. “To Do” notifications require action on the part of the recipient.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.
2. Select **Open To Do Notifications** using the drop down next to **View**. Select **Go**.



- Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

- The Notifications Details window for the notification you selected will appear. The Notifications Details window provides you with pertinent information about the requisition including requisition creation information, approval history and requisition summary and lines.

5

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29 JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To

Note

Approval Action

- To view the details of a requisition, click **View Requisition Details** link.
- The View Requisition Details screen will appear. Review the information displayed. To obtain more details such as the charging instructions, select the **View** link displayed to the left of each requisition line.

6

Items

To view additional details for a line item, click its **View** link.

	Line	PO Number	Item Description	Need-By	Unit	Quantity	Price	Total \$
View	1		Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	18-JUL-2002	Each	1	342.70999	342.71

View Requisition Details - This is not a valid Purchase Order

[View Approval History](#)

Requisition 1659 (In Process) Total \$ 26353.00

Created By **04, Practice**
 Creation Date **29-MAY-2002**
 Description **Lab 4 - Edit - Multi Org**

Deliver-To **04, Practice
 Rutgers, The State University of NJ
 21 Road 1
 Piscataway, NJ 08854-8031**

Note To Approver
 Note To Buyer
 Quick Order / Check Request PO #

Attachments

Attention To	Type	Description

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
Hide	1	DC550 Mass Spectrometer	19-JUN-2002	Each	1	26353	26353.00

Item Description **DC550 Mass Spectrometer**
 Special Info **None**
 Item Number
 Category **Supplies, Equipment and Merchandise**
 Supplier **Varian Analytical Instruments**
 Supplier Site **Chicago-01**
 Supplier Contact
 Contact Phone
 Supplier Item Number
 To Supplier
 PO Number **811**
 Buyer [Lyons, Kevin L](#)

Requester **04, Practice**
 Deliver-To **LIV 4087**
 Need-By Date **19-JUN-2002**

Accounts

Number	Percent	Dept Activity 1	Dept Activity 2
00-424709-10299-71000-000000-000	26.562		
00-201234-10531-71000-000000-000	73.438		

Attachments

Attention To	Type	Description

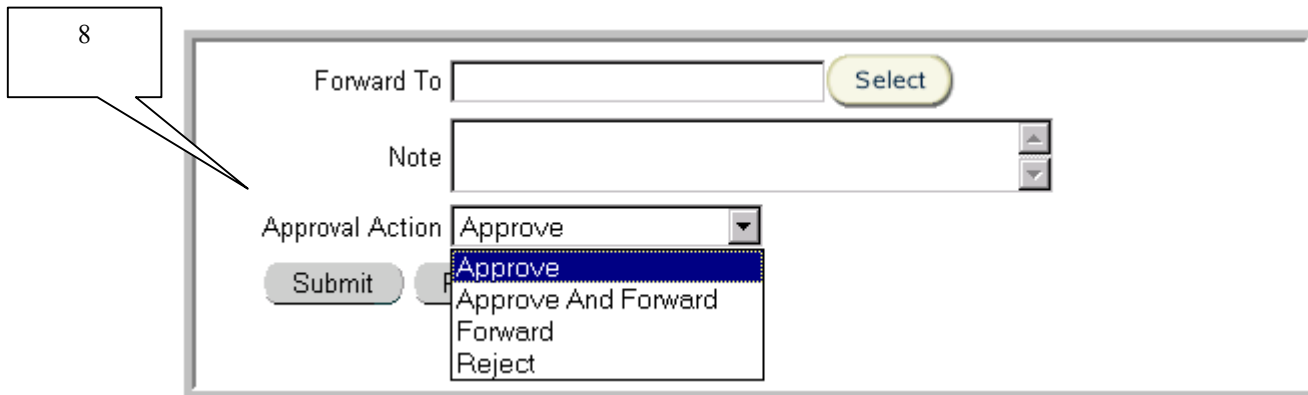
Approve Reject Respond

7

- When you are finished with your review, select **Respond**. This will return you to the Notifications Details screen.

Note: If you select **Approve** or **Reject**, you will not be given the opportunity to write notes. Instead, you will just receive a confirmation that the requisition has been approved or rejected.

- Scroll down page and select *Forward* as your **Approver Action**. Enter comments in the **Note** field explaining why the requisition is being forwarded to them and request that the requisition be returned back to you after his/her review. **Do not use the Reassign button.**



Action Taken	Upon Submission - Result of Action
<p>Forward <u>with</u></p> <p>An individual's name indicated in the Forward To field who has the appropriate authority to approve in the requisition approval hierarchy.</p>	<p>Requisition status becomes In Process – Once the individual that the requisition was forwarded selects Approve, the status will then become Approved.</p>
<p>Forward <u>with</u></p> <p>An individual's name indicated in the Forward To field who does <u>not</u> have the appropriate authority to approve in the requisition approval hierarchy.</p> <p>It is recommended that a note be added to return the requisition back to you after his/her review.</p>	<p>Requisition status become Forwarded – Once the individual that the requisition was forwarded selects Approve, the status will become In Process.</p> <p>Caution: If the individual named in Forward To does <u>not</u> return the requisition back to you, the requisition will continue up the requisition approval hierarchy until another authorized Approver is found.</p>

- Enter the name of the individual you wish to forward the requisition to using the list of values and wildcard (%) in the **Forward To** field, then click on **Select**.

9

Forward To [Select](#)

Note

Action

- Approve
- Approve And Forward
- Forward
- Reject

- Click on the **Select** link to the left of the **User** name.

10

Select User

Search for [Go](#)

Click a **Select** link to choose a value.


⏪ Previous 1 - 3 shown of 3 ⏩ Ne

	User	Internal Name
Select	Conlin, Michele	MCONLIN

- Once you have selected an action, click **Submit** to forward the requisition to the individual that you indicated
- Once you select an action, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.

13

[Requisition Status: Notifications](#) > Notification Details

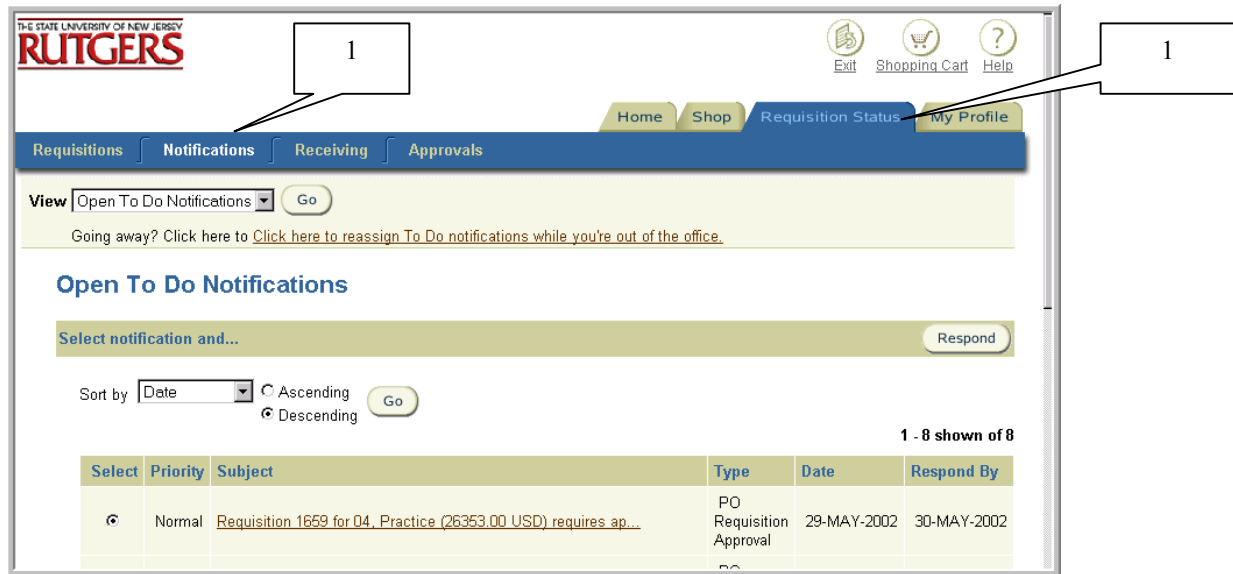
 **Confirmation:** Your notification response has been submitted.

- Select **Requisition Status: Notifications** link to return to your **Open To Do Notifications**.

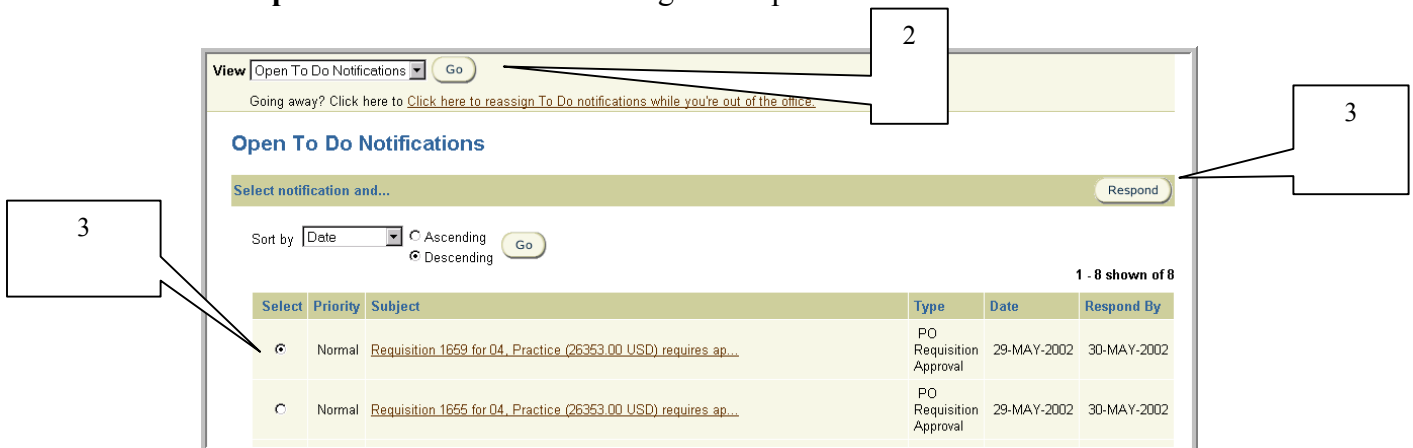
Editing a Requisition Received as a Notification

Scope

This procedure covers how to edit a requisition that you received as a notification.



1. Select **Requisition Status** tab. Click on **Notifications** to view all open notifications.
2. Select **Open To Do Notifications** using the drop down next to **View**. Select **Go**.



3. Select the notification that you wish to view by clicking on the radial button under **Select**. Select **Respond**.

Note: You may sort your notifications by using criteria defined in the **Sort by** drop down (e.g. **Type, Subject, Date**, etc.). **Priority** is a feature of the system that is not used at Rutgers.

- The Notifications Details window for the notification you selected will appear. The Notifications Details window provides you with pertinent information about the requisition including requisition creation information, approval history and requisition summary and lines.

5

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29-JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To

Note

Approval Action

- To view the details of a requisition, click **View Requisition Details** link.
- The View Requisition Details screen will appear. Review the information displayed. To obtain more details such as the charging instructions, select the **View** link displayed to the left of each requisition line.

6

Items

To view additional details for a line item, click its **View** link.

	Line	PO Number	Item Description	Need-By	Unit	Quantity	Price	Total \$
View	1		Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	18-JUL-2002	Each	1	342.70999	342.71

View Requisition Details - This is not a valid Purchase Order

[View Approval History](#)

Requisition 1659 (In Process) Total \$ 26353.00

Created By **04, Practice**
 Creation Date **29-MAY-2002**
 Description **Lab 4 - Edit - Multi Org** Deliver-To **04, Practice**
Rutgers, The State University of NJ
21 Road 1
Piscataway, NJ 08854-8031

Note To Approver
 Note To Buyer
 Quick Order / Check Request PO #

Attachments

Attention To	Type	Description

Items

To view additional details for a line item, click its **View** link.

	Line	Item Description	Need-By	Unit	Quantity	Price	Total \$
Hide	1	DC550 Mass Spectrometer	19-JUN-2002	Each	1	26353	26353.00

Item Description **DC550 Mass Spectrometer**
 Special Info **None**
 Item Number
 Category **Supplies, Equipment and Merchandise** Requester **04, Practice**
 Supplier **Varian Analytical Instruments** Deliver-To **LIV 4087**
 Supplier Site **Chicago-01** Need-By Date **19-JUN-2002**
 Supplier Contact
 Contact Phone
 Supplier Item Number
 To Supplier
 PO Number **811**
 Buyer [Lyons, Kevin L](#)

Accounts

Number	Percent	Dept Activity 1	Dept Activity 2
00-424709-10299-71000-000000-000	26.562		
00-201234-10531-71000-000000-000	73.438		

Attachments

Attention To	Type	Description

[Approve](#) [Reject](#) [Respond](#)

7

- When you are finished with your review, select **Respond**. This will return you to the Notifications Details screen.

8

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29-JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines


The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.

[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

 Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To:

Note:

Approval Action:

- Select **Edit Requisition** link. The Approver Shopping Cart Contents form appears.

Approver Shopping Cart

Shopping Cart | Delivery | Billing | Notes | Approvers | Review & Submit

Requisition 312

While Requisition 312 is open for editing in your Approver Shopping Cart, you can add or remove items and update quantities just as if you were working in your regular shopping cart.

When you're done adding items, press the **Approver Checkout** button below.

Note: Any changes made in the Approver Shopping Cart will not be saved until you check out.

Still have questions? Click here to [learn more about the approver editing process](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Total \$	Delete	Supplier	Supplier Site
1	Xerox Copier model number 12345 with additional stapler attachment number 232		Each	<input type="text" value="1"/>	10000.00	10,000.00		Xerox Corp	PRINCETON-01
update					Total \$	10,000.00			

[Return to Shopping](#)

[Close Approver Cart](#) | [Approver Checkout](#)

When you want to discard your work and close the approver shopping cart | Complete your edits and submit the revised requisition

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- To add items, click on **Return to Shopping** link. To change a quantity, enter your revised quantity in the **Quantity** field.

Select **Approver Checkout**. This will take you through each of the steps for creating a requisition. Indicate your changes in the appropriate fields, using the buttons on the bottom of each screen to progress through the requisition data entry process.

For more details on creating a requisition, see the **Requisitions** section.

- After selecting **Submit** on Step 6 - Review and Submit of creating a requisition, the Approver Edit Confirmation will be displayed. Select **Continue**. You will be returned to the Notifications Detail form.

Approver Edit Confirmation

Your edits to Requisition 312 have been saved.

Now that you've updated the requisition, press the Continue button to return to the notification and complete your approval response. Note that the notification was generated based on the original requisition and won't reflect the edits you've just made.

[Continue](#)

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

11. Scroll down page and select an **Approval Action**. See Managing To Do Notifications as a Reviewer or Approving Requisitions as an Approver procedures for further details.

Notification Details (Normal Priority)

To **Markey, Eileen F** Respond By
 Date **29-JUN-2002 11:40:24**
 Subject **Final reminder: Requisition 994 for Fehn, Bruce C (342.71 USD) requires approval**

Requisition Summary

Requisition Total	342.71 USD
Description	Bookshelves for office
Forwarded From	Fehn, Bruce C
Created By	Fehn, Bruce C
Justification	

Requisition Lines

The first five requisition lines are summarized below. For additional information, click the **View Requisition Details** link.


[View Requisition Details](#) | [Edit Requisition](#)

Line	Item Description	Supplier	Cost Center	UOM	Quantity	Unit Price	Line Amount (USD)
1	Bookcase-Open, 5 Adjustable Shelves, 15x36x80-1/2	Arbee Associates	10531	Each	1	342.70999 USD	342.71

Approval History

Sequence	Who	Action	Date	Note
4	Markey, Eileen F			
3	Fehn, Bruce C	Forward	27-JUN-2002	
2	Fehn, Bruce C	Reserve	27-JUN-2002	
1	Fehn, Bruce C	Submit	27-JUN-2002	

11



Open Document

Some buttons are disabled, because your responsibility does not allow you to launch these forms.

If you want to reassign the notification so someone else can respond on your behalf, press the Reassign button.

Forward To:

Note:

Approval Action:

12. Once you have selected an action, click **Submit**.
13. Once you select an action, the notification you selected is no longer included in your listing of notifications (worklist). You will receive a confirmation that your notification response has been submitted.

[Requisition Status: Notifications](#) > Notification Details



Confirmation: Your notification response has been submitted.

14. Select **Requisition Status: Notifications** link to return to your **Open To Do Notifications**.

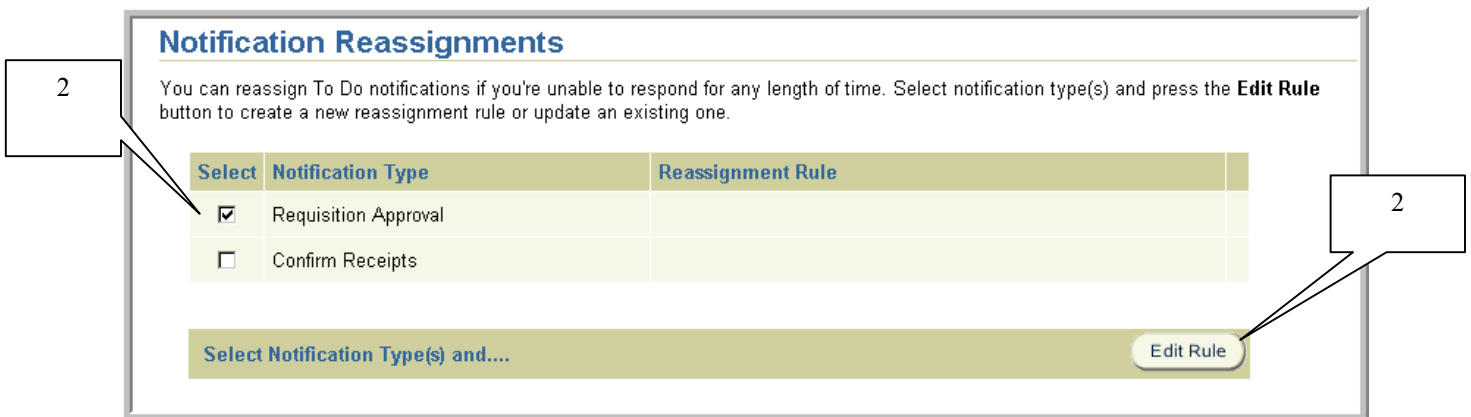
Reassigning Notifications

Scope

This procedure covers how to reassign To Do notifications if you are unable to respond for a length of time.



1. Select **Reassign To Do Notification while you're out of the office** link under your To Do List on the Internet Procurement home page.
2. Select the checkbox to the left of **Requisition Approval and/or Confirm Receipts** as the notification type, then select **Edit Rule**.



3. Enter a future **Start Date** the re-assignment rule should become effective in the format DD-MMM-YYYY.
4. Enter the **End Date** the re-assignment ends in the format DD-MMM-YYYY.

Reassignment Rule

Enter reassignment information and press the **OK** button below when you're done.

* Indicates a required field

Notification Type **Requisition Approval** 3

Reassignment Rule Duration


Indicate when the rule should become effective. If you don't provide an End Date, the rule will remain in effect, until you discontinue it.

* Start Date 4
(Example: 30-APR-2003)

End Date 4
(Example: 30-APR-2003)

Notification Recipient

Select the name of the person who will receive these notifications while you're away.

* Recipient  5

Additional Information

The comments you enter will appear on each reassigned notification.

Comments 6

5. Select the name of your backup by entering search criteria using the % wildcard, then select the flashlight icon in **Recipient**. Select **Go**.

Click on the **Select** button to the left of employee name who will be receiving the notifications.

6. Optionally, enter any remarks you wish to appear on each reassigned notification in the **Comments** field. These comments will be displayed on each notification the recipient you indicated in step 5 receives.
7. Select **OK**.

Notification Reassignments

You can reassign To Do notifications if you're unable to respond for any length of time. Select notification type(s) and press the **Edit Rule** button to create a new reassignment rule or update an existing one.

Select	Notification Type	Reassignment Rule	
<input type="checkbox"/>	Requisition Approval	Reassigned to Conlin, Michele	Delete Rule
<input type="checkbox"/>	Confirm Receipts		


Select Notification Type(s) and....

Edit Rule

8. To review the reassignment rule, click on the link **entitled *Reassigned to Name of Recipient***.

To delete the rule, click on the **Delete Rule** link.

9. Once you have entered a reassignment rule, your To Do List will be displayed as follows:

 **To Do List**

Your notifications are being reassigned. Click here to [view or edit your reassignment rules](#).

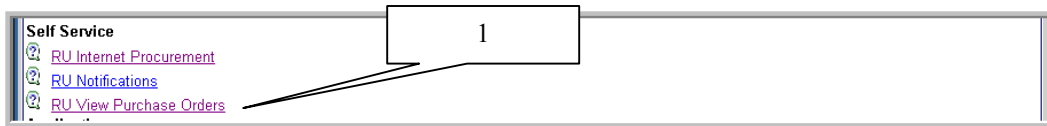
Viewing Purchase Order Information Online

Scope

This procedure covers how to view purchase order information online.

A requisition becomes a purchase order once the terms of the transaction have been approved by an authorized Buyer in UP&C or an agent with buying authority. University departments have buying authority limited to Quick Orders.

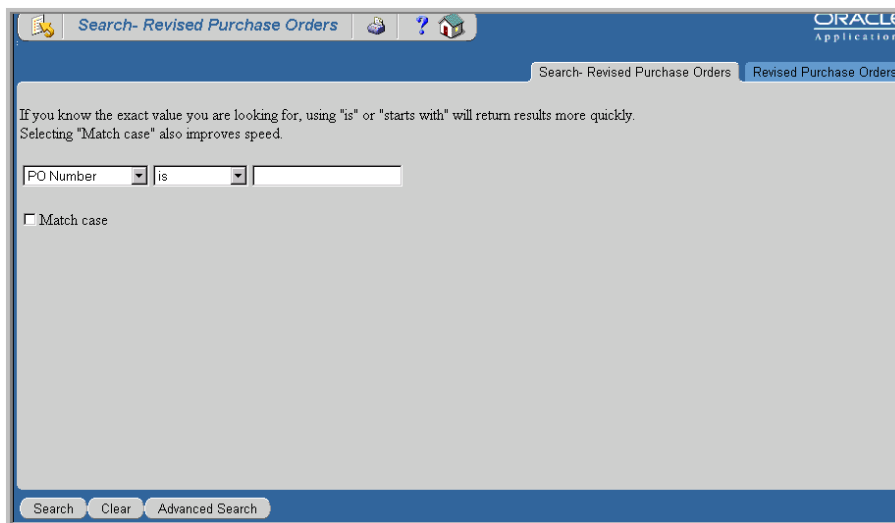
In addition to having purchase order information available online, Requisition Preparers will receive acknowledgement copies of external purchase orders via email in an Adobe Acrobat document format. The acknowledgement copies will be provided for both the regular and blanket purchase orders issued by UP&C each day. The copies will be distributed in an overnight process, and will be available to Preparers the next business day.



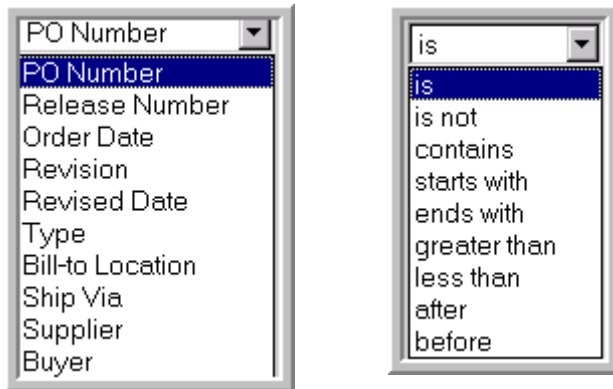
1. Select **RU View Purchase Orders** from the RIAS applications home page.



2. Select **View Purchase Orders**



3. Select your search criteria using the drop down arrows. If you know the exact value you are looking for, using “is” or “starts with” will return results more quickly.



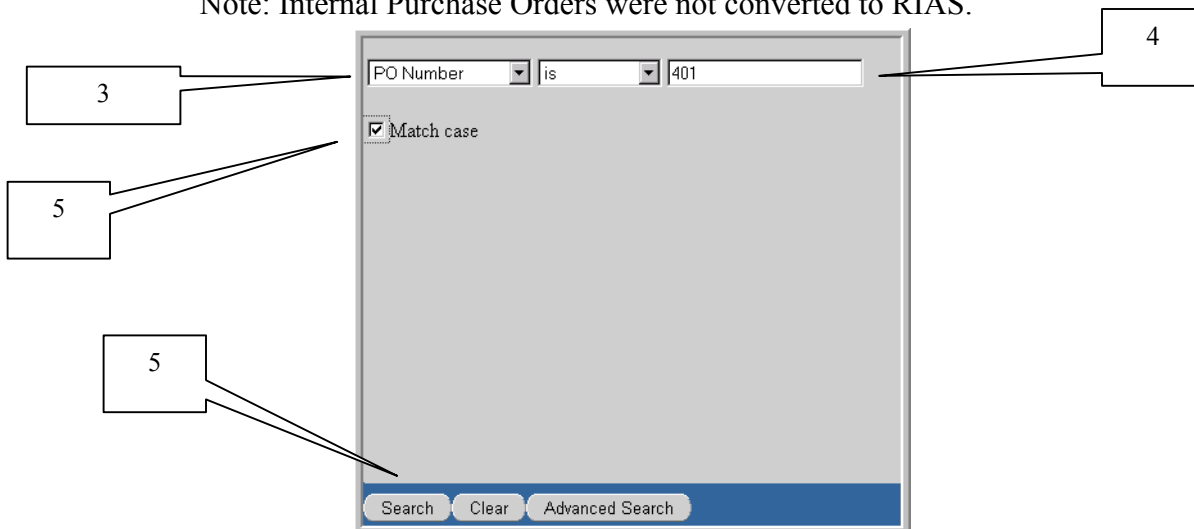
4. Enter the value you wish to search in the blank field. To view purchase orders established in RIAS, select **PO Number**, **is**, then enter the purchase order number as displayed below.

Note: To view a purchase order that was converted to RIAS, enter the purchase order form identification letter as shown below, then the complete purchase order number. For example to view an external blanket order 500776, select **PO Number**, “**is**”, then **B500776**. All converted purchase orders will indicate **UPC Conversion** as the **Ship-to Location**, the **Item Description** as **FY02 Conversion** and the total dollar amount converted. Purchase order line detail will not be displayed.

Regular Requisitions (R and B) Quick Orders (Q)

Plant Fund Requisitions (C) Request for Consulting/IPSP Form (P)

Note: Internal Purchase Orders were not converted to RIAS.



- Click on checkbox to the left of **Match case**, then click the **Search** button to invoke the query.
- The following information, such as the order date, revision, total amount, supplier and buyer's name is displayed.

PO Number	Order Date	Revision	Revised Date	Total	Currency	Type	Ship Via	Ship-to Location	Supplier	Buyer	Compare to Original PO	Compare to Previous PO	Show all PO Changes
401	19-JUN-2002	0		3762.40	USD	Standard Purchase Order		See Lines Below	K Mart	Coleman-Culpepper, Steph	Compare to Original PO	Compare to Previous PO	Show all PO Changes

7

- Select the link displayed under **PO Number**. Additional information can also be found if you select any of the links under **Ship-to Location**, **Buyer**, **Compare to Original PO**, **Compare to Previous PO** or **Show all PO Changes**.
- To view additional information on each line, select any of the links or buttons displayed.

Line	Shipment Number	Item	Item Revision	Item Description	Price	Qty Ordered	Ship-to Location	Compare to Original Line	Compare to Previous Line	Show all Line Changes
1	1			Balt Triple Laser/Dot Matrix Printer Stand, Gray: Use as a dual laser or dual dot matrix stand with bottom or rear feed capabilities. Three 24"W x 20"D platforms, and bottom metal plates that adjust up to 10" front to back.	15.9	4	LTV 4087 122	Compare to Original Line	Compare to Previous Line	Show all Line Changes

Preparing a Change Order to a Purchase Order

Scope

This procedure covers how to prepare a change order to a purchase order.

A purchase order is a contract between Rutgers University and a supplier. When changes are made that affect the contract, certain procedures must be followed depending on the type of change required. A change order is a mechanism that should be used for changes that affect the supplier. Shipping and Delivery Costs are considered part of the contract and do not generally require a change order, even when they exceed the original purchase order amount.

For changes in unit price of an item, decrease the quantity, delete an item or cancel a purchase order:

1. Complete the Change Order Request (COR) form that is available on the web at <http://rias.rutgers.edu/formsrequirements.html>. The form is available in both Adobe Acrobat and MSWord “fill-in” formats.
2. Email the completed COR to the authorized Approver(s) of the Organization(s) to which the original purchase order was charged.
3. The Approver indicates his or her approval of the change in the body of the email and forwards the email to the appropriate Buyer in UP&C for processing of the change order request.

Hint: You may obtain the name of the responsible buyer by using **RU View Purchase Orders**. See Viewing Purchase Orders On-line procedure for further details.

For increase in quantity or amount changes:


4. Prepare a new requisition indicating in a **Note to Buyer** if you wish have the requisition combined with an existing purchase order and which purchase order number you wish to have it combined with (e.g. blanket supplements or additional items).

Preparing a Change/Close Commitment Form

Scope

This procedure covers how to prepare a change/close commitment form to close a paper-based internal purchase order to an internal supplier that is not reflected in RIAS. For all other changes, see Preparing a Change Order to a Purchase Order procedure.

The most current listing of Rutgers internal suppliers that are reflected on RIAS is available on the RIAS web site at <http://www.rias.rutgers.edu>.

- 
1. Obtain a copy of the paper-based Change/Close Commitment Form from Disbursement Control.
 2. Complete the form and deliver directly to Disbursement Control for input.

Entering Receipts

Scope

This procedure covers how to receive items online. In order to ensure that the University is paying for only those goods or services properly ordered and authorized, received and accepted, Disbursement Control is required to match invoice information with underlying purchase order information. University policy requires a receipt for all purchase orders of \$1,000 or greater before payment can be made to the supplier. Purchase order lines of \$1,000 or greater will appear in the Requester's receiving queue entitled **Items to Receive** until all the items have been received.

Purchase orders of \$1,000 or greater for the below purchases will be acknowledged with a paper invoice certification form:

1. New Blanket Orders
2. Subcontracts (Sponsored Programs)
3. Consulting, Professional Services and other Fixed Price Agreements
4. Paper Purchase Orders converted into RIAS

1. After you verified the number of items received with the description and quantities on the purchase order and packing slip, select **Receive Items** from the Internet Procurement homepage (or **Receiving** if you selected another receiving link)

receiving process

Receive

- Record receipt of the items you ordered.
- [Receive Items](#)

Return

- Need to send items back to the supplier?
- [Return Items](#)

Correct

- Did you record the wrong receipt quantity?
- [Correct Receipts](#)

Items to Receive

Click an item description link to receive the selected item, or click a requisition link to receive any of the requisition's items.

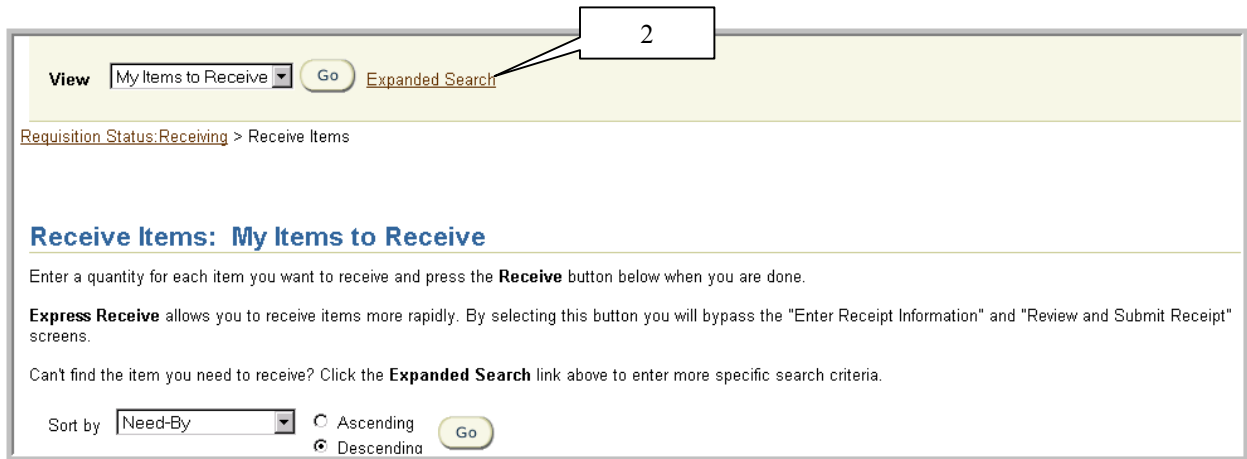
Requisition	PO Number	Item Description	Need By
474	1238	computer	11-JUL-2002
260	303	BOTL,WM,HDPE OBLNG C...	10-JUL-2002

Receipts at a Glance

Receipt	Item Description	Receipt Date
27	BOTL,WM,HDPE OBLNG C...	22-JUN-2002
26	SHAKER,WTR BATH FRCE...	22-JUN-2002

2. Select the link displayed under **Requisition, PO Number** or **Item Description** that you wish to acknowledge receipt under **Items to Receive**.

Alternatively, you may select **Receive Items** link, then click on **Expanded Search**.



View [Expanded Search](#)

[Requisition Status:Receiving](#) > Receive Items

Receive Items: My Items to Receive

Enter a quantity for each item you want to receive and press the **Receive** button below when you are done.

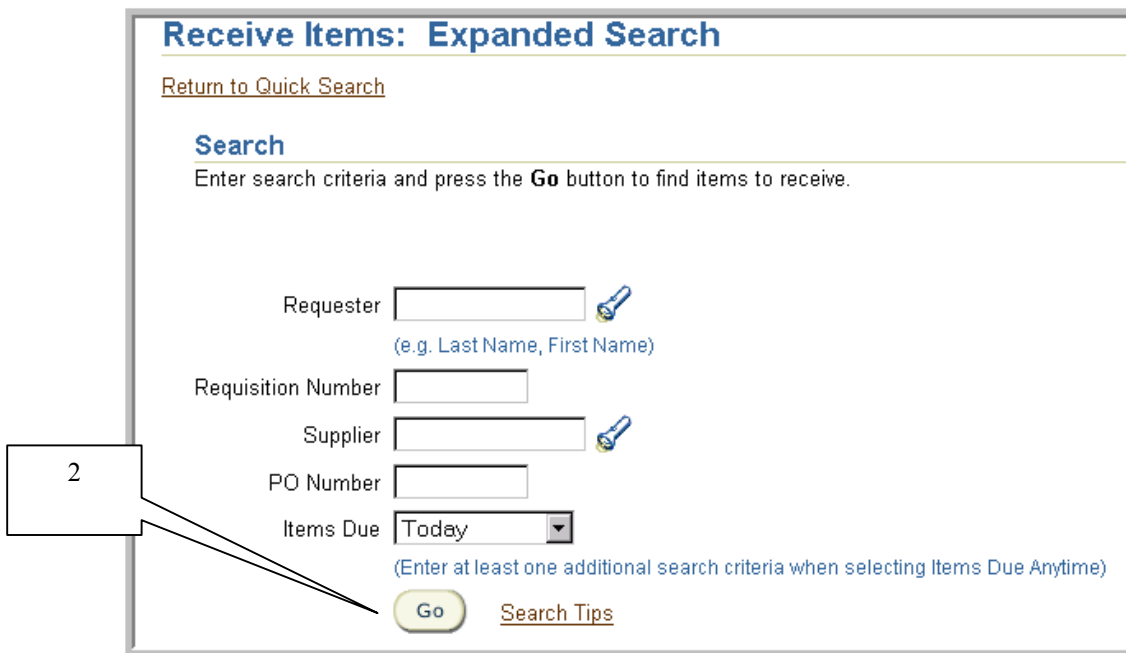
Express Receive allows you to receive items more rapidly. By selecting this button you will bypass the "Enter Receipt Information" and "Review and Submit Receipt" screens.

Can't find the item you need to receive? Click the **Expanded Search** link above to enter more specific search criteria.

Sort by Ascending Descending

A callout box with the number '2' points to the 'Expanded Search' link.

If you selected **Expanded Search**, enter your search criteria, then select **Go**. Remember to use the wildcard (%) with fields denoted with a flashlight icon.




Receive Items: Expanded Search


[Return to Quick Search](#)

Search

Enter search criteria and press the **Go** button to find items to receive.

Requester 
(e.g. Last Name, First Name)

Requisition Number

Supplier 

PO Number

Items Due
(Enter at least one additional search criteria when selecting Items Due Anytime)

[Search Tips](#)

A callout box with the number '2' points to the 'Go' button.

- Enter the total number of items received in the **Receipt Quantity** field, then select **Receive**.

View [Expanded Search](#)

[Requisition Status:Receiving](#) > Receive Items

Receive Items: My Items to Receive

Enter a quantity for each item you want to receive and press the **Receive** button below when you are done.

Express Receive allows you to receive items more rapidly. By selecting this button you will bypass the "Enter Receipt Information" and "Review and Submit Receipt" screens.

Can't find the item you need to receive? Click the **Expanded Search** link above to enter more specific search criteria.

Sort by: Ascending Descending

Requisition	Item Description	Need-By	Unit	Receipt Quantity	Quantity Ordered	Already Received	Supplier	PO Number
791	Dell Computer model# 1234	21-MAY-2002	Each	<input type="text" value="3"/>	5	3	ACE	565

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- The **Receipt Date** will default to the current date. Enter **Packing Slip** information and/or **Receipt Comments**, then select **Continue**.

Enter Receipt Information

* Indicates a required field

* Receipt Date:
(Example: 30-APR-2003)

Packing Slip:

Receipt Comments (max 240 chars):

Does this information apply to all items you want to receive?

Yes
 No, some receipt information differs by item

Note: If you selected a purchase order in step 2 that has multiple lines to receive, you will see displayed **Does this information apply to all items you want to receive?** It will default to **Yes**. To change, select the radial button to the left of **No, some receipt information differs by item**. If **No** is selected, the below screen will be displayed. Enter the **Packing Slip** and **Item Comments** for each line, then select **Continue**.

Requisition	Item Description	Unit	Receipt Quantity	Waybill	Packing Slip	Item Comments	Supplier
464	Dell Computer Model ABC	Each	1	waybill			Computer Management Corp
464	Dell Computer Model ABC	Each	1	waybill			Computer Management Corp

- Review the receipt details, then select **Submit**. To correct, use the browser's back button to make your change and select **Continue** until you reach the Review and Submit Receipt screen.

Review your receipt details and press the **Submit** button when you are done. If you need to make changes, use your browser's Back button.

Receipt Date **01.MAY.2002**
Receipt Comments

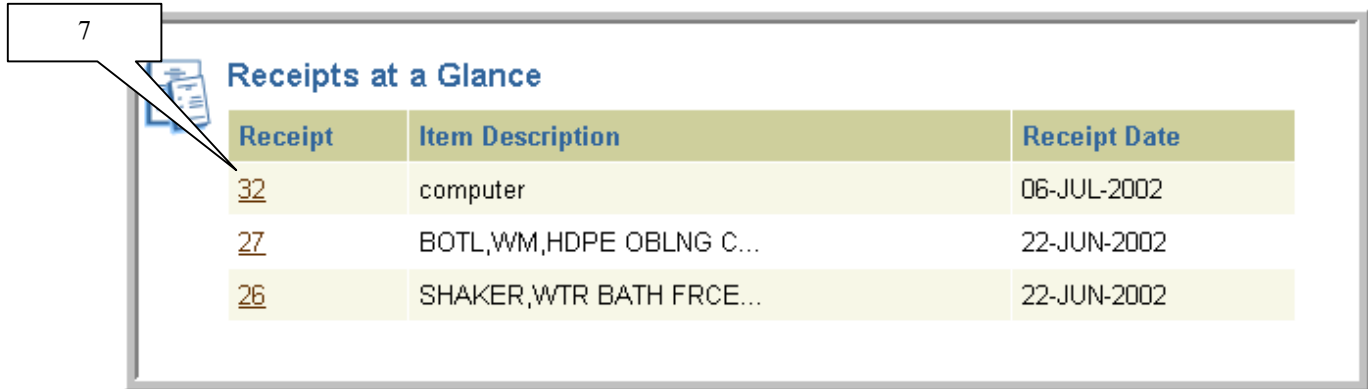
Requisition	Item Description	Unit	Receipt Quantity	Packing Slip	Item Comments	Supplier
791	Dell Computer model# 1234	Each	1			ACE

- Upon submission, a system generated receipt number will be assigned. To continue, select **Return to Receiving**.

Confirmation
Receipt 75 has been created for you.

[Return to Receiving](#)

7. The receipt number is displayed under **Receipts at a Glance**. **Receipts at a Glance** lists your most current receipts. By selecting on the receipt number link shows additional information such as when the item was received and who processed the receipt.



The screenshot shows a table titled "Receipts at a Glance" with three columns: "Receipt", "Item Description", and "Receipt Date". The first row is highlighted in light green and contains the receipt number "32", the item description "computer", and the date "06-JUL-2002". A callout box with the number "7" points to the "32" in the first row. The second row contains "27", "BOTL,WM,HOPE OBLNG C...", and "22-JUN-2002". The third row contains "26", "SHAKER,WTR BATH FRCE...", and "22-JUN-2002".

Receipt	Item Description	Receipt Date
32	computer	06-JUL-2002
27	BOTL,WM,HOPE OBLNG C...	22-JUN-2002
26	SHAKER,WTR BATH FRCE...	22-JUN-2002

Entering Returns

Scope

This procedure covers how to indicate a return of an item online.

If items previously received on-line are returned, then the Requester must indicate the return of those items without delay in Internet Procurement.

1. After you verified the number of items returned, select **Receive Items** from the Internet Procurement homepage (or **Receiving** if you selected another receiving link)

receiving process

- Receive**
 - Record receipt of the items you ordered.
 - [Receive Items](#)
- Return**
 - Need to send items back to the supplier?
 - [Return Items](#)
- Correct**
 - Did you record the wrong receipt quantity?
 - [Correct Receipts](#)

Items to Receive
Click an item description link to receive the selected item, or click a requisition link to receive any of the requisition's items.

Requisition	PO Number	Item Description	Need By
474	1238	computer	11-JUL-2002
260	303	BOTL,WM,HDPE,OBLNG C...	10-JUL-2002

Receipts at a Glance

Receipt	Item Description	Receipt Date
27	BOTL,WM,HDPE,OBLNG C...	22-JUN-2002
26	SHAKER,WTR BATH FRCE...	22-JUN-2002

2. Select **Return Items** link.
3. Select your search criteria using the drop down box next to **View** and select **Go**, or choose **Expanded Search** link.

If you wish to sort your search results, select your criteria using the drop down next to **Sort by**, select the **Ascending** or **Descending** radial button, then **Go**.

THE STATE UNIVERSITY OF NEW JERSEY
RUTGERS

Exit Shopping Cart Help

Home Shop Requisition Status My Profile

Requisitions Notifications Receiving Approvals

View My Last 10 Receipts Go Expanded Search

Requisition Status: Receiving > Return Items

Return Items: My Last 10 Receipts

Enter a quantity for the item(s) you need to return (note that you may have created multiple receipts for a single requisition line). Press the **Return** button below when you're done.

Sort by Receipt Ascending Descending Go

Indicates an adjusted receipt quantity Previous 1 - 5 Shown of 5 Next

Receipt	Requisition	Item Description	Unit	Return Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495

- If you selected **Expanded Search**, enter your search criteria, then select **Go**. Remember to select from the list of values for fields denoted with a flashlight icon. Scroll down page to view your search results.

Requisition Status: Receiving > Return Items

Return Items: Expanded Search

[Return to Quick Search](#)

Search
Enter search criteria and press the **Go** button to find receipts with items you want to return.
[Hide Search Criteria](#)

Receipt Created By

Items Received Any Time

Receipt

Requisition Number

PO Number 495

Supplier

Go Search Tips

- To view receipt details, select the link displayed under **Receipt**. To view the requisition details, select the link displayed under **Item Description**. A blue dot in **Quantity Received** if displayed indicates an adjusted receipt quantity. To view details, select the link displayed under **Quantity Received**.

5

5

● Indicates an adjusted receipt quantity

Previous 1 - 5 Shown of 5 Next

Receipt	Requisition	Item Description	Unit	Return Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text" value="1"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text" value="1"/>	1	Computer Management Corp	495
39	464	Dell Computer Model ABC	Each	<input type="text" value="0"/>	0 ●	Computer Management Corp	495

5

6. Enter the total number of items returned in **Return Quantity**, then select **Return**. This will take you to the Enter Return Information screen. If you wish to clear the quantities entered, select **Clear Changes**.

6

● Indicates an adjusted receipt quantity

Previous 1 - 5 Shown of 5 Next

Receipt	Requisition	Item Description	Unit	Return Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text" value="1"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text" value="1"/>	1	Computer Management Corp	495
39	464	Dell Computer Model ABC	Each	<input type="text" value="0"/>	0 ●	Computer Management Corp	495
37	464	Dell Computer Model ABC	Each	<input type="text" value="0"/>	0 ●	Computer Management Corp	495
36	464	Dell Computer Model ABC	Each	<input type="text" value="3"/>	3 ●	Computer Management Corp	495

Return Clear Changes

Previous 1 - 5 Shown of 5 Next

7. Enter % in **Reason**, then select the flashlight icon. Select **Go**.

Find Receipt Return Information Review & Submit

Enter Return Information

Enter additional return information. Press the **Continue** button below when you're done.

* Indicates a required field

Reason

Return Material Authorization

Comments (max 240 chars)

Continue

- Click **Select** to the left of the best explanation as to why the items are being returned.

8

Search

Enter search criteria and press the **Go** button to find reasons.

Search By Reason Name

Search Results

Press the **Select** button to choose a reason. If you can't find the value you want, try searching again with different criteria.

Previous 1 - 7 shown of 7 Next

Select	Reason Name	Reason Description
<input type="button" value="Select"/>	Damaged	Damaged (Item/s, Packaging, etc.)
<input type="button" value="Select"/>	Did Not Order	Did Not Order
<input type="button" value="Select"/>	Do Not Want	Do Not Want
<input type="button" value="Select"/>	Incorrect	Incorrect (Item/s, Color, Size, etc.)
<input type="button" value="Select"/>	Other (Use Comment Box)	Other (Use Comment Box)
<input type="button" value="Select"/>	Overshipment	Overshipment
<input type="button" value="Select"/>	Shipped to Wrong Location	Shipped to Wrong Location

- Enter the **Return Material Authorization** number that was provided to you by the supplier, then enter any **Comments** that you wish to indicate on the return. Select **Continue**.

Enter Return Information

Enter additional return information. Press the **Continue** button below when you're done.

* Indicates a required field

Reason

Return Material Authorization

Comments (max 240 chars)

9

- Review the return details, then select **Submit**. To make a correction, use the browser's back button, then select **Continue** until you reach the Review and Submit Return(s) screen.

Find Receipt
Return Information
Review & Submit

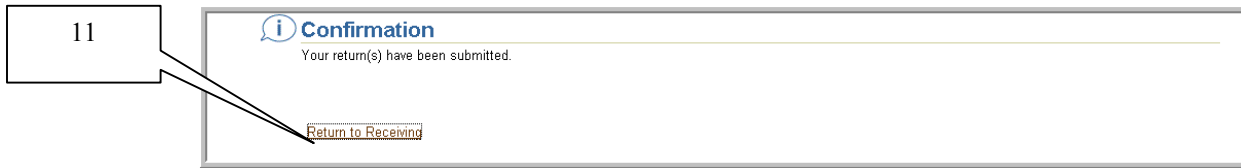
Review and Submit Return(s)

Review your return details and press the **Submit** button when you're done. Use your browser Back button if you need to make changes.

Receipt	Item Description	Unit	Return Quantity	Quantity Received	Supplier	Comments	Reason	Return Material Authorization
46	Dell Computer Model ABC	Each	1	1	Computer Management Corp	The computer monitor was damaged.	Damaged	RMA-112

10

11. Upon submission, you will receive a confirmation of the return. To continue, select **Return to Receiving**.



12. Contact Disbursement Control to notify them that you entered a return to ensure payment is not released for the returned items.

Entering Receipt Corrections

Scope

This procedure covers how to indicate a receipt correction of an item if you recorded the wrong quantity.

1. Select **Receive Items** from the Internet Procurement homepage (or **Receiving** if you selected another receiving link)



The screenshot displays the 'receiving process' interface. On the left, a navigation menu is visible with three main sections: 'Receive', 'Return', and 'Correct'. The 'Correct' section includes a link for 'Correct Receipts'. A callout box with the number '2' points to this link. On the right, the 'Items to Receive' section contains a table with the following data:

Requisition	PO Number	Item Description	Need By
474	1238	computer	11-JUL-2002
260	303	BOTL,WM,HDPE OBLNG C...	10-JUL-2002

Below this table is the 'Receipts at a Glance' section, which contains another table:

Receipt	Item Description	Receipt Date
27	BOTL,WM,HDPE OBLNG C...	22-JUN-2002
26	SHAKER,WTR BATH FRCE...	22-JUN-2002

2. Select **Correct Receipts** link.
3. Select your search criteria using the drop down next to **View** and select **Go**, or choose **Expanded Search** link.

If you wish to sort your search results, select your criteria using the drop down next to **Sort by**, select the **Ascending** or **Descending** radial button, then **Go**.

3

3

3

View [Expanded Search](#)

[Requisition Status:Receiving](#) > Correct Receipts

Correct Receipts: My Last 10 Receipts

Change an inaccurately recorded receipt by entering the correct quantity below. Press the **Correct** button at the bottom of the page when you're done.

Sort by Ascending Descending

• Indicates an [adjusted receipt quantity](#) Previous 1 - 5 Shown of 5 Next

Receipt	Requisition	Item Description	Unit	Correct Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
39	464	Dell Computer Model ABC	Each	<input type="text"/>	Q •	Computer Management Corp	495

- If you selected **Expanded Search**, enter your search criteria, then select **Go**. Remember to select from the list of values for fields denoted with a flashlight icon. Scroll down page to view your search results.

[Requisition Status:Receiving](#) > Correct Receipts

Correct Receipts: Expanded Search

[Return to Quick Search](#)

Search
Enter search criteria and press the **Go** button to find receipts you want to correct.

Receipt Created By

Items Received

Receipt

Requisition Number

PO Number

Supplier

[Search Tips](#)

4

- To view receipt details, select the link displayed under **Receipt**. A blue dot in **Quantity Received** if displayed indicates an adjusted receipt quantity. To view details, select the link displayed under **Quantity Received**.

5

5

• Indicates an [adjusted receipt quantity](#) Previous 1 - 5 Shown of 5 Next

Receipt	Requisition	Item Description	Unit	Correct Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
39	464	Dell Computer Model ABC	Each	<input type="text"/>	Q •	Computer Management Corp	495

- Enter the corrected quantity in the **Correct Quantity**, then select **Correct**. If you wish to clear the quantities entered, select **Clear Changes**.

Correct Receipts: My Last 10 Receipts

Change an inaccurately recorded receipt by entering the correct quantity below. Press the **Correct** button at the bottom of the page when you're done.

Sort by Ascending Descending

• Indicates an adjusted receipt quantity

Receipt	Requisition	Item Description	Unit	Correct Quantity	Quantity Received	Supplier	PO Number
46	464	Dell Computer Model ABC	Each	<input type="text" value="2"/>	1	Computer Management Corp	495
46	464	HP Printer Model ABC	Each	<input type="text"/>	1	Computer Management Corp	495
39	464	Dell Computer Model ABC	Each	<input type="text"/>	0	Computer Management Corp	495
37	464	Dell Computer Model ABC	Each	<input type="text"/>	0	Computer Management Corp	495
36	464	Dell Computer Model ABC	Each	<input type="text"/>	3	Computer Management Corp	495

- Review the correction details, then select **Submit**. To make corrections, use your browser's back button, make your corrections, select **Continue** until you reach the Review and Submit Correction(s) screen.

Review and Submit Correction(s)

Review your correction quantity and press the **Submit** button when you're done. Use your browser Back button if you need to make changes.

Receipt	Item Description	Unit	Correct Quantity	Change	Quantity Received	Supplier
46	Dell Computer Model ABC	Each	2	+1.0	1	Computer Management Corp

[Home](#) | [Shop](#) | [Requisition Status](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

- Upon submission, you will receive a confirmation of the correction. To continue, select **Return to Receiving**.

Confirmation

Your correction(s) have been submitted.

[Return to Receiving](#)

- Contact Disbursement Control to notify them that you entered a correction to ensure payment is not released for the corrected items.

Viewing Receipts

Scope

This procedure covers how to view receipts with all associated returns and corrections.

1. Select **Receive Items** from the Internet Procurement homepage (or **Receiving** if you selected another receiving link)

receiving process

Receive

- Record receipt of the items you ordered.
- [Receive Items](#)

Return

- Need to send items back to the supplier?
- [Return Items](#)

Correct

- Did you record the wrong receipt quantity?
- [Correct Receipts](#)

View

- View receipts with all associated returns and corrections.
- [View Receipts](#)

Items to Receive

Click an item description link to receive the selected item, or click a requisition link to receive any of the requisition's items.

Requisition	PO Number	Item Description	Need By
474	1238	computer	11-JUL-2002
260	303	BOTL,WM,HDPE OBLNG C...	10-JUL-2002

Receipts at a Glance

Receipt	Item Description	Receipt Date
27	BOTL,WM,HDPE OBLNG C...	22-JUN-2002
26	SHAKER,WTR BATH FRCE...	22-JUN-2002

2. Select **View Receipts** link.
3. Select your search criteria using the drop down next to **View** and select **Go**, or choose **Expanded Search** link.

If you wish to sort your search results, select your criteria using the drop down next to **Sort by**, select the **Ascending** or **Descending** radial button, then **Go**.

3

View My Last 10 Receipts [Expanded Search](#)

Requisition Status: [Receiving](#) > [View Receipts](#)

View Receipts: My Last 10 Receipts

Click an item description link to view requisition line details. Click a receipt link to view additional receipt information.

Sort by Receipt Ascending Descending

• Indicates an [adjusted receipt quantity](#)

Previous **1 - 5** Shown of **5** Next

Receipt	Requisition	Item Description	Unit	Quantity Received	Receipt Date	Supplier	PO Number
46	464	HP Printer Model ABC	Each	1	29-MAY-2002	Computer Management Corp	495

3

- If you selected **Expanded Search**, enter your search criteria, then select **Go**. Remember to select from the list of values for fields denoted with a flashlight icon. Scroll down page to view your search results.

View Receipts: Expanded Search

[Return to Quick Search](#)

Search

Enter search criteria and press the **Go** button to find the receipts you want to view.

Received By

Items Received Today

Receipt

Requisition

PO Number

Supplier

[Search Tips](#)

4

- To view receipt details, select the link displayed under **Receipt**. To view the requisition details, select the link displayed under **Item Description**. A blue dot in **Quantity Received** if displayed indicates an adjusted receipt quantity. To view details, select the link displayed under **Quantity Received**.

View Receipts: My Last 10 Receipts

Click an item description link to view requisition line details. Click a receipt link to view additional receipt information.

Sort by Receipt Ascending Descending

Previous **1 - 3** Shown of **3** Next

Receipt	Requisition	Item Description	Unit	Quantity Received	Receipt Date	Supplier	PO Number
32	474	computer	Each	1	06-JUL-2002	Apple Computer Inc	1238

5

5


Preparing Travel and Business Expense Reports

Scope

This procedure covers how to prepare a travel and business expense report (TABER) for an individual's out-of-pocket expenses incurred while traveling on University business or otherwise conducting University business. (See University travel policies in UR&PM, Book 6, Section 6.1.10).

The amount of the reimbursement will depend, of course, on the nature and necessity of the expenditures claimed, as well as the reimbursement guidelines established by the University and the employee's department. As a general rule, however, employees should not personally purchase (and then seek reimbursement for) materials, supplies, services or equipment for the benefit of the University. These items should normally be procured by using University purchase orders.

The TABER can also be used to reimburse non-employees for their out-of-pocket expenses incurred in connection with University business. For non-employees, however, the TABER can only be used in instances where the non-employee is receiving payment exclusively for expense reimbursement. If the non-employee is receiving a fee for services rendered in addition to the expense reimbursement, then both the fee and the expense reimbursement must be combined and paid in accordance with the University's policy governing payments to individuals (UR&PM Book 6, Section 6.1.4).

- 
1. Complete the Travel and Business Expense Report (TABER) form that is available on the RIAS web site at <http://rias.rutgers.edu/formsrequirements.html>. The form is available in both Adobe Acrobat and MSWord "fill-in" formats. The TABER must contain an explanation of the business reason or purpose for the expenditure.
 2. Attach original receipts for all itemized expenses of \$25.00 or more.
 3. The individual requesting reimbursement must sign the TABER.

Alternatively, some departments have developed internal forms to report reimbursable expenses. In these instances, the individual must sign the departmental form and attach it to the TABER. If the requester's signature is included on the departmental form, indicate "See Attached Departmental Form" in the employee's signature block of the TABER. When departmental forms are used, the TABER must still contain the name and address of the requester and the complete billing information and amounts to be charged. Other required details of the reimbursement need not be on the TABER if they are on the departmental form.

4. The completed, original TABER and its corresponding receipts are to follow the same approval path as purchase requisitions and check requests except the routing will be a manual process. That is, an individual will need to deliver or mail his or her TABER (along

with receipts to an authorized Approver for the organization to which the reimbursement is being charged.

5. Upon review and approval, the authorized Approver will sign the TABER and deliver or mail the TABER and original receipts to Disbursement Control for payment and retention.

Requesting Travel Advances

Scope

This procedure covers how to prepare a travel advance request for a Rutgers employee.

Travelers may request cash advances for travel when necessary. Generally, advances are to be requested only for meals and incidentals. Advance requests for more than \$100 per day of travel must have a justification letter attached to the request. Advance requests are to be received in Disbursement Control no later than two weeks prior to departure. Travel advances will be issued no earlier than two weeks prior to the traveler's departure date.

Travel advances are considered a personal charge to the individual requesting the advance and should be settled by submitting a TABER with appropriate receipts within 10 days of the traveler's return to work. Outstanding travel advances for completed trips must be settled before subsequent advances will be issued. (See University Travel Policies in UR&PM, Book 6, Section 6.1.10 for further details).

The University will no longer accept or process travel advances on check requests; all employee travel advances must be submitted on the Employee Travel Advance Request form (TAF).

1. Complete the Employee Travel Advance Request form that is available on the RIAS web site at <http://rias.rutgers.edu/formsrequirements.html>. The form is available in both Adobe Acrobat and MSWord "fill-in" formats. The request form must indicate the departmental account to charge the advance with the natural account (subcode) 34900. The form must contain an explanation of the business reason or purpose for the advance.

Note: The travel advance account 012056-1400 will no longer be used. Once Disbursement Control has processed the travel advance, the advance will now be reflected on your departmental account under the new subcode 34900 in OFIS. Once a Travel and Business Expense Report (TABER) has been completed upon return of the business trip, the advance will be reversed under subcode 34900, and the actual expense reflected under the subcodes referenced on the TABER (e.g. 35000, 35200, 35300).

2. The individual requesting the advance must sign the TAF.

Alternatively, some departments have developed internal forms to request travel advances. In these instances, the individual must sign the departmental form and attach it to the Employee Travel Advance form. If the requester's signature is included on the departmental form, indicate "See Attached Departmental Form" in the preparer's signature block of the TAF. When department forms are used, the TAF must still contain the name and address of the requester and the complete billing information and amounts to be charged. Other required details of the advance need not be on the TAF if they are on the departmental form.

3. The completed, original TAF is to follow the same approval path as purchase requisitions and check requests except the routing will be a manual process. That is, an individual will need to deliver or mail his or her TAF to an authorized Approver for the organization to which the advance is being charged.
4. Upon review and approval, the authorized Approver will sign the TAF and deliver or mail the TAF to Disbursement Control for payment and retention.

Acronym and Term Definitions

RIAS Term			Definition
ACRONYMS			
AP			Accounts Payable
COA			Chart of Accounts
EUL			End User Layer
FOB			Freight on Board
GL			General Ledger
HRMS			Human Resource Management System
IP			Internet Procurement
IPO			Internal Purchase Order
LOV			List of Values
OFIS			Online Financial Information System
PDF			Portable Document Format
PO			Purchase Order
PUR			Purchasing Application
RIAS			Rutgers Integrated Administrative System
RFI			Request for Information
RFP			Request for Proposal
RFQ			Request for Quotation
UOM			Unit of Measure
UP&C			University Procurement and Contracting
URL			Uniform Resource Location
UR&PM			University Regulations and Procedures Manual
TERMS			
11i			The release of Oracle Software that Rutgers will be implementing
2-Way Matching			<p>The process of verifying that the information contained in the following electronic documents match within accepted tolerance levels:</p> <ol style="list-style-type: none"> 1. Purchase Order 2. Supplier Invoice
3-Way Matching			<p>The process of verifying that the information contained in the following electronic documents match within accepted tolerance levels:</p> <ol style="list-style-type: none"> 1. Purchase Order 2. Receipt of Goods or Services 3. Supplier Invoice
4-Way Matching			The process of verifying that the information contained in the

RIAS Term	Definition		
			<p>By default, an approver is a Preparer.</p> <p>The approver must be defined and maintained in the Human Resource module and the Purchasing module.</p>
Approval Group			A set of authorization rules assigned to an individual as an approver. These rules comprise of criteria such as organization and dollar amounts.
Approval Assignment			The assignment of a position authorized to be an approver to an approval group.
Autocreate			A function in Oracle Purchasing that takes completed, approved requisition line(s) and creates a Purchase Order.
Attachment			Additional descriptive information about your requisition forwarded to the approver, buyer, or supplier along with your purchase order. The attachment may take the form of a file (Word, Excel, Visio or Adobe Acrobat), or text.
Base Application			One of the forms-based applications. In Phase I, base applications include General Ledger, Human Resources, Accounts Payable and the Purchasing application.
Billing Method			An indication of whether one is requesting goods billed by quantity, or goods or services billed by amount. One chooses one of these item types on a non-catalog request.
Blanket Purchase Order/Agreement			A type of purchase order that UP&C issues to document a long-term supplier agreement that may include negotiated pricing and terms.
Browser			Software that allows a user to navigate and view graphical content on the Internet. Netscape and Internet Explorer are browsers.
Buyer			An individual who is authorized to create purchase orders with suppliers and negotiates supplier contracts.
Category			A commodity code listing used to group items with similar characteristics, such as equipment.
Catalog request			A request for goods/services where the supplier and pricing are available electronically.
Change Order			<p>A document detailing changes to be made to an approved purchase order.</p> <p>Note: Once a requisition has been released and converted to a purchase order, the Preparer or approver can no longer make changes directly to the requisition.</p>
Check Request			<p>A requisition request to procure selected goods/services.</p> <p>Previously referred to as a Rutgers Billhead or Request for Payment.</p>

RIAS Term	Definition	
Chart of Accounts		<p>The account structure used to record transactions and maintain account balances in the General Ledger.</p> <p>For Phase I, the existing Chart of Accounts and the existing account structure will be used.</p>
Commitments		<p>Used synonymously with encumbrances. Commitments comprise of all approved and pending for approval requisitions and purchase orders.</p>
Cross Validation Rules		<p>Rules that are defined in the Oracle General Ledger of valid combinations of segment values that a user can enter. These rules restrict users from entering invalid combinations of account segment values.</p> <p>For Phase I, the cross validations that will be defined:</p> <ul style="list-style-type: none"> • Funding Sources with the appropriate Organizations • Funding Sources with appropriate Natural Accounts (Sub/Object Codes)
Conversion		<p>The process of bringing data from the existing legacy systems into RIAS for start up purposes.</p>
Deliver-To-Location		<p>An actual physical location where goods or services are to be delivered.</p> <p>By default, this will be the Preparer's location as defined in the Oracle Human Resource module.</p> <p>A Preparer has the option to manually change the deliver-to-location to reflect the location where the goods are to be delivered.</p> <p>The deliver-to-location code will be expanded to reflect an actual street address that is printed on the approved purchase order.</p>
Discoverer		<p>Software developed by Oracle that provides ad-hoc query, reporting and analytical capabilities. It automates the analysis and reporting of data by providing "views" of data within the Oracle database.</p> <p>Rutgers will be using the web-based version that does not require software to be installed on the user desktop.</p>
Direct Routing Method		<p>How the system (workflow) will find the first available position along the requisition approval hierarchy branch that has the appropriate approval authority for that organization.</p>

RIAS Term	Definition	
Encumbrance		See Commitments
End User Layer		A component of Discoverer that provides ways to mask the underlying complexity of the database to provide end users with an interface they can easily understand and execute while providing data access security.
Estimated Unit Price		The estimated cost per unit of measure.
Filter		Used when querying data in Internet Procurement, a filter provides a subset of data values based upon your search criteria
Folder		A flexible entry and display window in the base applications that allows one to choose the fields one wants to see and where each fields appears in the window. Typically, data in a folder can be exported to Excel.
Freight Carrier		A commercial company used to transport goods.
Freight Charges		A shipping charge that may be included in the price or added separately on the invoice.
Freight on Board		<p>The point or location where the ownership title of goods is transferred from the seller to the buyer. This indicates that delivery of a shipment will be made on board or into a carrier by the shipper without charge, and is usually followed by a shipping point or destination.</p> <p>For example, FOB destination means title passes when the goods reach their destination point.</p>
Forward		An action one takes to send a document to another employee without attempting to approve it himself/herself.
Functionality		What functions the software is able to perform.
Funding Source		<p>Previously referred to as an Account Number.</p> <p>The source of funding that a transaction is posted to in the General Ledger.</p> <p>In Phase I, the legacy 6 digit account number found on OFIS will continue to be used.</p>
Funds Checking		The process of certifying that sufficient funds are available from the funding source to cover the amount of the transaction.
General Ledger		<p>In Phase I, the General Ledger will be a shell application (only partially implemented) designed to support the I-Procurement, Purchasing and Accounts Payable applications.</p> <p>Data from Oracle General Ledger will be interfaced into the legacy General Ledger (OFIS) on a nightly basis. OFIS will continue to be used for financial reporting purposes.</p>
GL Date		The date used to determine the correct accounting period for transactions.

RIAS Term	Definition	
Go Shopping		The first step in preparing a requisition in I-Procurement.
Hold		In Oracle Accounts Payable, a feature that prevents a transaction from occurring or completing until the hold has been released. For example, a hold will be placed on an invoice if the receipt of goods does not match the invoice within the accepted tolerances during the 3-way match process. This hold will prevent a payment of the invoice until the discrepancy is resolved and the hold released.
Human Resource Management System		In Phase I, the Human Resource Management System will be a shell application (only partially implemented) designed to support the I-Procurement, Purchasing and Accounts Payable applications.
I-Procurement or sometimes referred as Internet Procurement		One of the Oracle's self-service applications for ordering goods or services from external and internal sources. I-Procurement uses a web-shopping model that is similar to online shopping sites such as Amazon.com using the common "Shopping Cart" to achieve processing efficiency with easier access to critical information.
Internal Requisition		A request to procure goods or services from an internal Rutgers supplier (another University department).
Interface		The process of feeding data into or out of RIAS from/to existing internal/external systems.
Internal Purchase Order		A purchase order to another University department (an internal supplier) to provide goods or services to another Rutgers department. Internal Purchase Orders do not require the review of a Purchasing Buyer. Examples of internal providers are Facilities, Computer Store, Mail and Document Services, Material Services
Internal Supplier		A Rutgers department.
Item Description		A description of a good or service.
Invoice		A document received by Rutgers from a supplier that lists amounts owed to the supplier for purchased goods or services.
Item		Anything Rutgers buys, sells or handles in business. An item may be tangible such as supplies or intangible such as a service.
Invoice import		A process used to import invoices from external systems into the RIAS Accounts Payable.
List of Values		A feature used while entering data in any of the Oracle applications that increases one's accuracy and productivity. In each of the applications, the system notifies one when a list of acceptable input values is available for a field with a specific icon.

RIAS Term	Definition		
			<p>In I-Procurement, a List of Values is depicted as a Flashlight Icon or a Go/Search button.</p> <p>In the base applications a List of Values is depicted as three dots at the end of a data field.</p>
Log On			<p>Used synonymously with Sign On.</p> <p>A NetID username and password that allows one to gain access to RIAS applications. Each sign-on is assigned to one or more responsibilities.</p>
Message Line			<p>A line of a window that displays helpful hints, warning or error messages.</p> <p>In I-Procurement, the message line can be found on the top left of the window.</p> <p>In the base applications a message line can be found on the bottom left of the window.</p>
My Favorites List			<p>A personalized shortcut to frequently requested no-catalog or items in I-Procurement.</p>
Natural Account			<p>Previously referred to as an Object Code/Sub Code.</p> <p>The segment of the accounting flexfield that determines whether the account is an asset, liability, equity, revenue or expense account.</p> <p>In Phase I, the legacy 4 digit object/sub code found on OFIS will continue to be used with an extra "0" at the end.</p>
Notification			<p>An electronic message that is invoked when a specific business condition or rule is met. A notification informs the recipient of 1) a status of a transaction or 2) requests the recipient to take an action such as approval or modification. For example, a notification will be sent to an approver when a requisition requiring approval is received.</p>
Need-by-Date			<p>The date by which one needs an item or service.</p>
Non-Catalog Request			<p>An electronic request to procure goods and/or services that are not available using one of the electronic catalogs – Rutgers or Oracle Exchange.</p>
Note			<p>Additional information or special instructions pertaining to the requisition that one enters to bring to the attention of the approver or buyer.</p>
One-time Delivery location			<p>The manual entry of a non-Rutgers deliver-to-location where goods or services are being delivered to.</p>

RIAS Term	Definition		
			<p>An actual physical location where goods are to be delivered.</p> <p>The deliver location will be printed on the approved purchase order.</p>
Online Financial Information System			The legacy system that provides online access to financial accounting, budget and payroll data to authorized users throughout Rutgers University.
Oracle			The name of the supplier (Oracle Corporation) from whom the RIAS application software has been purchased.
Oracle Exchange			External suppliers who participate in Oracle Exchange but do not reflect Rutgers pre-negotiated prices electronically.
Organization			Rutgers operating unit or department for financial accounting and human resource reporting purposes. Employees are assigned to organizations to which they work.
Payment Terms			Rules used to calculate the due date and discount date for payment of a transaction based upon the invoice date.
Pay Site			A supplier site that is designated to receive payments. One cannot enter an invoice for a supplier site that is not defined as a pay site.
Portable Document Format			A file format developed by Adobe Systems. PDF files are snapshots of formatted document files and may contain formatted text, graphics, color, and images that are viewable, navigable, and printable on multiple platforms.
Pre-Approved			Status given to a requisition or purchase order that has been approved by a University delegate with an authorized dollar approval limit. If the document is forwarded from one approver to another for additional review, its status is considered pre-approved.
Preparer			<p>An individual who is authorized to create an online requisition.</p> <p>By default, the Preparer is named as the requestor on requisitions.</p> <p>A Preparer may create his/her own requisitions or create them on behalf of another individual.</p> <p>A Preparer has the option to manually change the requestor named on a requisition.</p> <p>A Preparer must be defined and maintained in the Human Resource module and the Purchasing module.</p>
Preferred Supplier			External suppliers that the University has established a University-wide agreement with that contains pre-negotiated pricing and terms/conditions.

RIAS Term		Definition
Purchase Order		A contract between Rutgers and a supplier for purchasing goods or services. Each purchase order is given a unique number.
Purchase Order Number		The unique number is assigned to the purchase order that the buyer sends to the supplier to fulfill a requisition. In Oracle, the Purchase Order Number will be a different number than the Requisition Number.
Purchasing Site		A supplier site for which one orders goods or services. A supplier must have at least one purchasing site before one can create a purchase order.
Purchase Requisition		See Requisition
Quantity		The number of items needed. For the billing method, Goods or Services billed as Amount, the quantity would be in \$1 US Dollar denominations.
Query		A user's request for information.
Quick Purchase Order		A requisition request with an external supplier that does not exceed \$1000 and does not involve purchases in the published restricted categories. Quick orders do not require the review of a Buyer in Purchasing, but they do require that the supplier be on the supplier database.
Quotation		A statement of the price, terms and conditions of sale a supplier offers for items. A quotation usually includes a detailed description (specification) of goods or services the supplier offers.
Receiver		An individual who is responsible for the online receipt of goods and services. To record a receipt, a receiver enters the quantity received. By default, the individual named as the requestor on purchase orders will have those items reflected on the "My Items to Receive" screen on his/her I-Procurement Home Page.
Receipt Quantity		The quantity of items received from a supplier.
Request for Quotation		A document used to solicit supplier quotations for goods or services. Typically, a request for quotation is sent to many suppliers to ensure the University receives the best price and terms.
Requester		An individual who has identified a need for a good or service. By default, the requestor is recognized by the system as the receiver. A requestor must be defined and maintained in the Human Resource module and the Purchasing module.

RIAS Term	Definition		
Requisition			A request for goods or services. A requisition can include many lines. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item and the account number(s) being charged.
Requisition Approval			The act of approving the purchase of the items on a requisition. A requisition must receive the required approvals before a buyer can create a purchase order from the requisition. A requisition is fully approved only when an employee(s) who has enough authority for the organization and the dollar limit approves it.
Requisition Number			The unique number assigned to the requisition that the requester sends to the approver. The Requisition Number will be different from the Purchase Order Number.
Requisition Approval Hierarchy			A structure of positions that defines the automatic routing of requisitions from a Preparer to an approver.
Responsibility			Assigned to each user, a responsibility is a set of data, menus and forms that defines an individual's level of authority to process transactions within the system. Several users share the same responsibility; a single user can have multiple responsibilities.
Requisitioner			See Preparer
Reviewer			<p>An individual outside the Preparer's requisition approval hierarchy to whom a requisition has been forwarded for review. This individual has no direct approval authority for that requisition. Instead he/she will be recorded in the approval history with his/her review comments only. The reviewer can then return the requisition to the sender, or forward to another individual for appropriate action.</p> <p>A reviewer must be defined and maintained in the Human Resource module and the Purchasing module.</p>
RFQ Only Site			A supplier site from which one receive quotations.
Rutgers Exchange			<p>External suppliers who will provide a product in which the pre-negotiated pricing is available electronically. In Phase I, the following are presently designated as Rutgers Exchange suppliers:</p> <ol style="list-style-type: none"> 1. Arbee Associates 2. Boise Cascade Office Products 3. CDW Government 4. Fisher Scientific 5. MSC Industrial Supply 6. Sigma-Aldrich 7. Staples 8. VWR Scientific

RIAS Term			Definition
Rutgers Integrated Administrative System			A multi-year, multi-phase initiative to improve Rutgers efficiency and effectiveness by replacing outdated administrative systems and related processes.
Self Service Application			Web Browser program that allows users to respond to notifications and enter data such as purchase requisitions and check requests. I-Procurement is a self-service application.
Shopping Cart			A container for all the items selected in the current session of I-Procurement. A shopping cart can be saved and returned to later.
Sign-On			See Log On
State Preferred Supplier			External suppliers that the State of New Jersey has designated.
Submit			To send electronically a document to another individual (Approver or Reviewer).
Supplier			Internal or External Provider of goods or services in return for payment.
Supplier Site			A specific location of a supplier. A supplier may have one or many supplier sites. Examples of sites are Pay site Only, Purchasing Site Only, Pay and Purchasing Site or RFQ Only site.
Supplier Invoices			Payments owed to internal/external suppliers for goods and services
Supplier Item Number			The number the supplier uses to identify the item or service.
Toolbar			A collection of iconic buttons in the base applications that each perform a specific action when one chooses it. Each button replicates a commonly used menu item. Depending on the context of the current field or window, a button can be enabled or disabled. One can display a hint for an enabled toolbar button by holding your mouse steadily over the button.
Tolerance			The acceptable degrees of variances Rutgers define between quantities and item prices for invoices, receipts and purchase orders. If any of the variances between a matched invoice and purchase order exceed the tolerances Rutgers specifies, the system places the applicable invoice on hold.
Uniform Resource Location			Address of a file accessible on the Internet.
Unit of Measure			Defines the amount or size of the material being purchased. For example, a unit of measure includes "Each "or "Box".
User Approval Actions			Actions that an approver can take in I-Procurement. These actions are:

RIAS Term		Definition	
			Approve Approve and Forward Forward Reject
Voucher Number			A number used as a record of a business transaction. A voucher number may be used to review invoice information, in which case it serves as a unique reference to a single invoice.
Vendor			See Supplier
Workflow			An Oracle system function used to automate a business process by routing information to an individual according to the business rules defined by Rutgers. For example, workflow will be used to automatically route a requisition from the Preparer to the approver