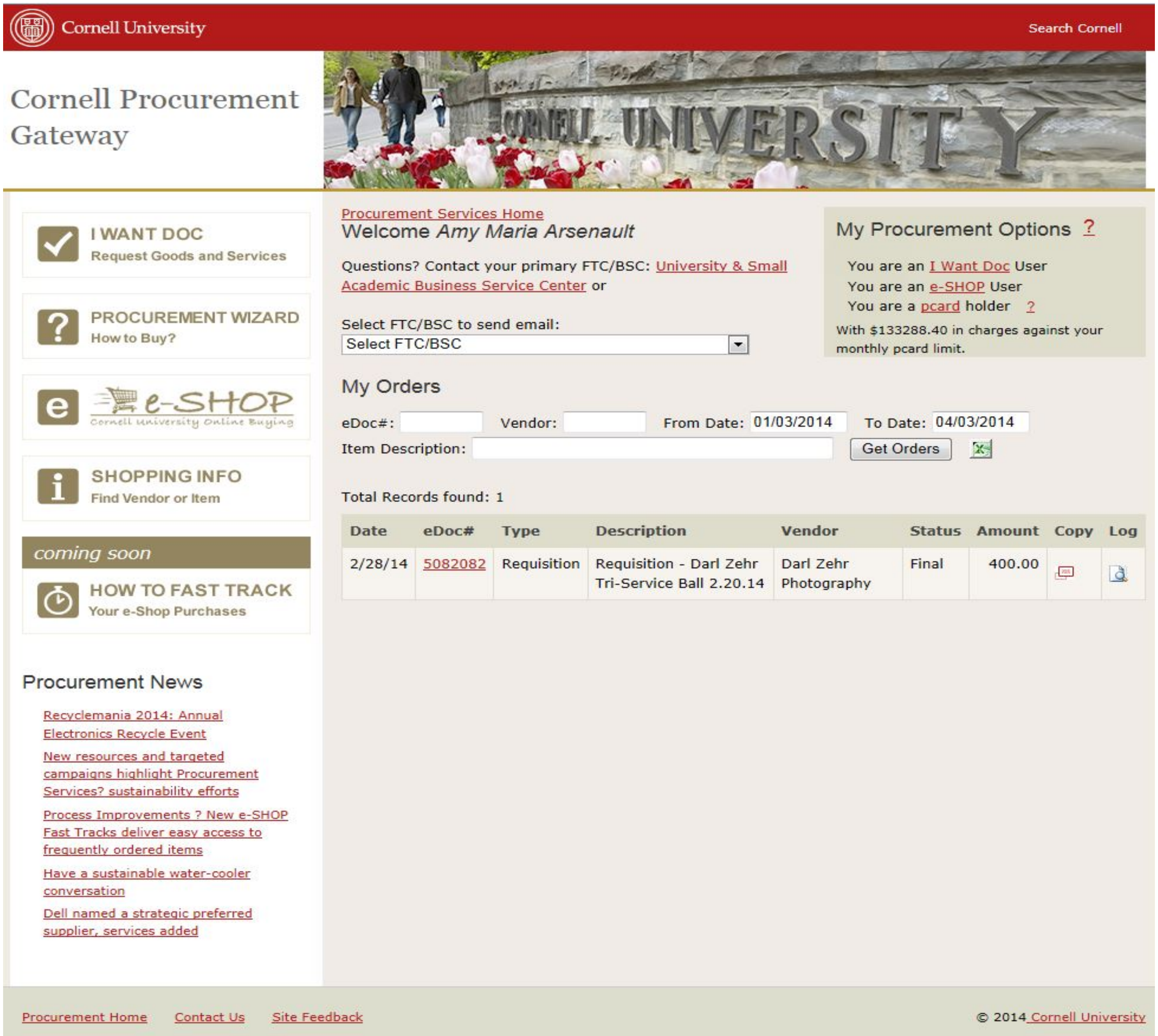
Procurement Gateway & I Want Doc User Guide

https://gateway.procurement.cornell.edu/

Procurement Gateway



Once you log into the Procurement Gateway, the system will identify who you are and your primary FTC/BSC you are linked with or you can select another FTC/BSC to send an email to.

Helpful Tools within the Procurement Gateway:

- I WANT DOC – Electronic form used to Request Goods or Services
- PROCUREMENT WIZARD – Step-by-step questions to help you identify How to Buy?
- e-SHOP – Cornell's online procurement system.
- SHOPPING INFO – Find Vendor or Item

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My Procurement Options

The following options may appear:

- You are an I Want Doc User
  - Everyone who signs into the Procurement Gateway is an I Want Doc User
- You are an e-SHOP User – If you are an e-SHOP User
- You are a PCard holder
  - This will show the total dollar amount charged against your monthly PCard limit. *NOTE: PCard charges above do not include outstanding authorizations or purchases internal to Cornell and are charges within 2 days.*

My Orders

Your most recent 10 transactions/orders will appear in the My Order queue.

To search for an order that is not showing in this view, you can search by any of the following fields:

- eDoc #
- Vendor
- From / To Date
- Item Description

Once you have entered the search criteria, click "Get Orders"

Status Definitions:

Saved	Document was saved by the Requestor prior to routing.
Enroute	Document was routed and is pending approval requests.
Final	Document has received all required approvals and the FTC/BSC has processed the order.
Disapproved	Document has been disapproved by an approver during the routing process.
Cancelled	Document has been cancelled by the requestor prior to routing or by a reviewer during the routing process; routing stops.

Order history will show both e-SHOP and I Want Docs

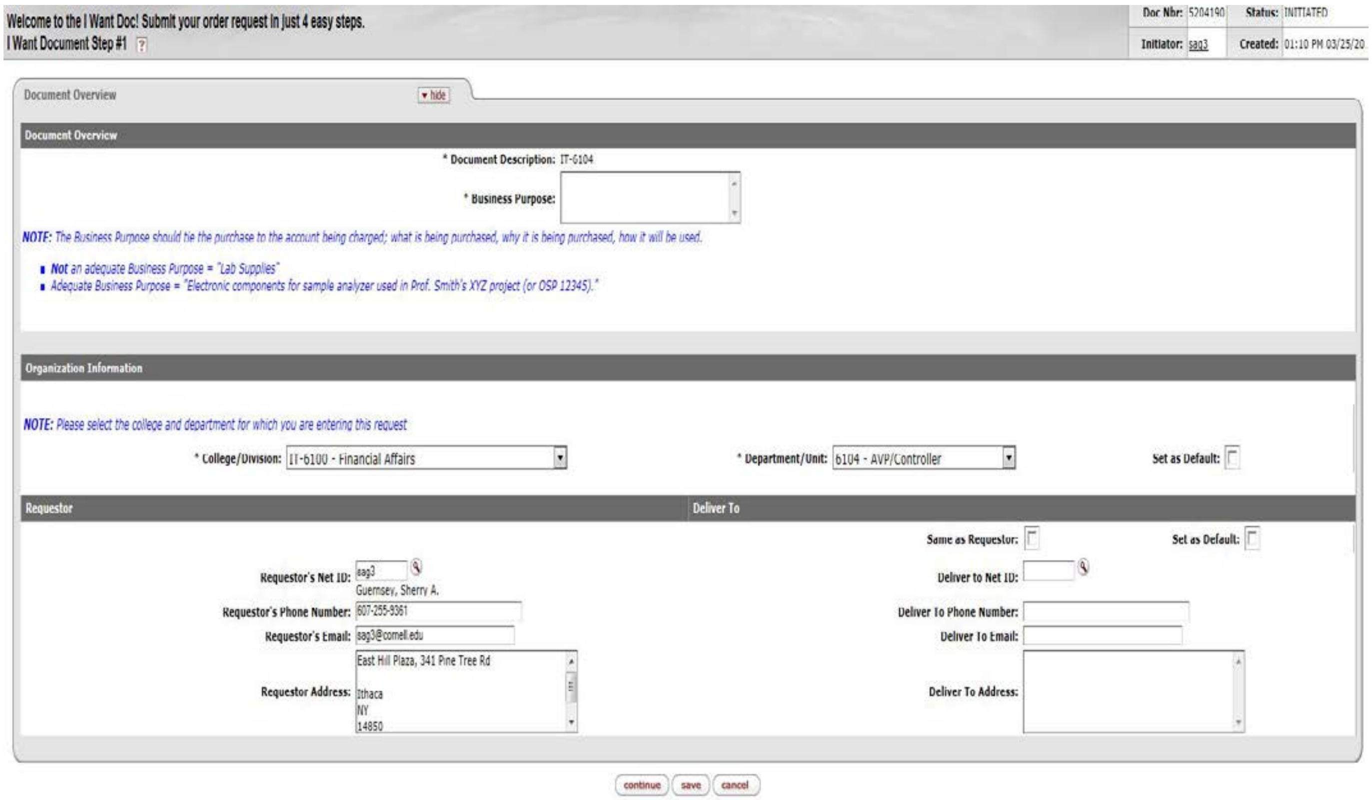
Copy – To be used for re-ordering.

Log – Will show you the status of your I Want Doc

I Want Doc (IWNT)

The I Want Doc should be used by individuals (Requestors) for any request for goods/services, excluding travel reimbursements that cannot be done via e-SHOP or by utilizing their individual Procurement Card.

1. I Want Document, Step #1 - Document Overview



Fields:

- **Document Description**
  - Defaults to "I Want Document #XXXXXX", a unique reference # for the order request.

- **Business Purpose**
  - ***Required field.**
  - Explains the reason why the purchase is being made. The business purpose needs to be understandable by an internal/external auditor with no knowledge of the department or the transaction. NOTE: If this is being charged to sponsored account, please be sure to include how the purchase directly relates to the scope of the project.

- **Organization Information**
  - Information used to route the I Want Doc to the correct FTC/BSC for processing.
  - College/Division
    - This will pre-populate from your people record in Workday
  - Department/Unit
    - This will pre-populate from your people record in Workday

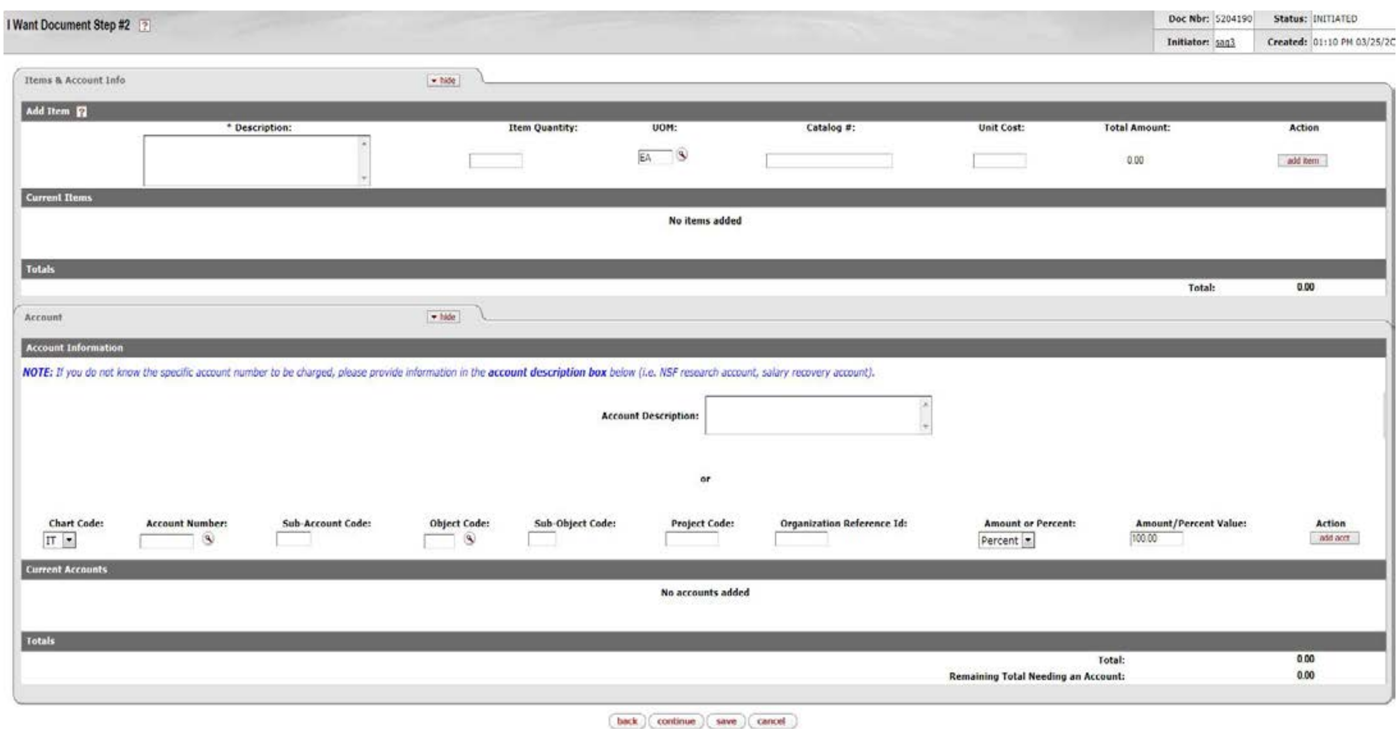
  - o Set as Default
    - ▪ If the College/Division and Department/Unit is correct and you know this will never change, you can check the box for Set as Default.

- **Requestor**
  - o This is the person initiating the I Want Doc and the profile information is based on their NetID and will pre-populate from your people record in Workday.

- **Deliver To**
  - o This is the person the order should be delivered to.
  - o If the Requestor and Deliver to person is the same, please check "Same as Requestor" and the delivery information will pre-populate.
    - o NOTE: If the delivery location is always the same, click Set as Default and this will populate on all future I Want Doc requests.
  - If the Deliver to person is different than the Requestor:
    - o List the person's NetID and hit enter. Their information will prefill. You may edit the information if necessary.
    - o Manually enter the shipping information.
    - o Search for an individual by selecting the magnifying glass and entering information in one of the search fields. When you have found the correct individual, select return value on the left hand side of the screen for the info to populate the I Want Doc.

Click ***Continue*** at the bottom of the page

2. I Want Document, Step #2 – Items & Account Info



Fields:

- **Add Item**
  - * Description
  - Item Quantity
  - UOM
  - Catalog #, if applicable
  - Unit cost
  - Click, Add Item

  NOTE: * = Only Required field in this section, all others are optional.

- **Account**
  - If the account number to charge is unknown, provide a description of the account in the "account description box" such as "NSF Research Account" or "Office Supply Account", etc. Enough detail should be provided that someone will be able to easily identify the appropriate account.

  - If the account number is known, provide as much of the account number in the various account boxes. A look up is available for the account number.

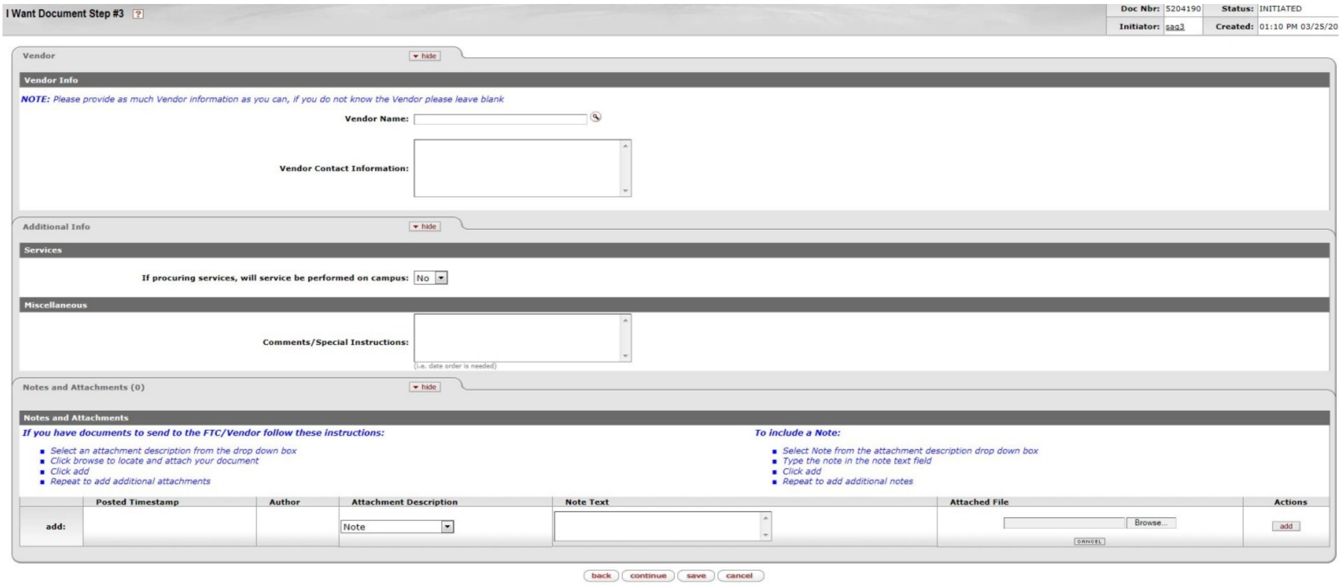
    - Account Description
    - Account Number
    - Sub Account Code
    - Object Code
    - Sub-Object Code
    - Project code
    - Org Ref ID
    - Amount of Percent
    - Amount/Percent Value

    - Select the magnifying glass and provide information in the provided search fields.
    - When the correct account is identified, click "return value" and the account number will carry through to the I Want Doc.
    - There is the ability to charge multiple accounts, and split the cost either by dollar amount or percentage.

NOTE: When listing an account, please be sure to click the Save button.

Click ***Continue*** at the bottom of the page.

3. I Want Document, Step #3 – Vendor, Addtl. Info & Notes and Attachments



Fields:

- **Vendor Name**
    - To pre-populate Vendor from KFS, select the magnifying glass to search for the vendor, click Search
    - Vendor results will display
    - To select Vendor, click "return value" and the vendor information will carry through to the I Want Doc.

NOTE: The vendor search defaults to PO Vendor

- If you need to select a Disbursement Voucher (DV) Vendor, you can change the default selection in the vendor search screen.
- If you can't locate the vendor, cancel the search and free form type the vendor that you would like to use in the vendor field of the I Want Doc.

- **Additional Info**
  Services: For insurance purposes, please indicate if services will be performed on campus.

- **Miscellaneous**
  Comments/Special Instructions: Please list any information regarding the order that needs to be communicated to the FTC/BSC of the Vendor. Examples would include expediting shipping, special delivery instructions or a need by date.

- **Notes & Attachments**
  To attach supporting documentation that need to be sent to the FTC/BSC or Vendor (Quote, Receipt, etc.) to the I Want Doc:

    - Select an attachment description from the drop down box – Note, Quote, Invoice, Contract Agreement, Sole Source, Specifications, or Other
    - Add a note in the Note Text field

- Click "Browse" to locate and attach your document(s)
- Click "Add" under Actions
- Repeat to add additional attachments

NOTE: Do not scan and attach any sensitive data.

Scanned Documents

- Ensure all document is a "true original"
  - If the document being scanned is not an original (e.g., copy or fax), note this fact on the document before scanning it, and include an explanation of why the original is not being used.
- Ensure all documentation is legible
  - If the originals are not legible, print on the document the pertinent information (e.g., vendor name, date, dollar amount, etc.) before scanning it.
- Ensure the original documentation has not been altered, other than to protect confidential information or make legible the vendor name, etc. (see above).
  - Blacken out credit card numbers, SSN # or any confidential/sensitive data, but documents must not be altered in a way that is not obvious.
- Ensure the original document does not have highlighting or tape over pertinent information, as this may destroy the original information over time.

Record Retention of the "Original"

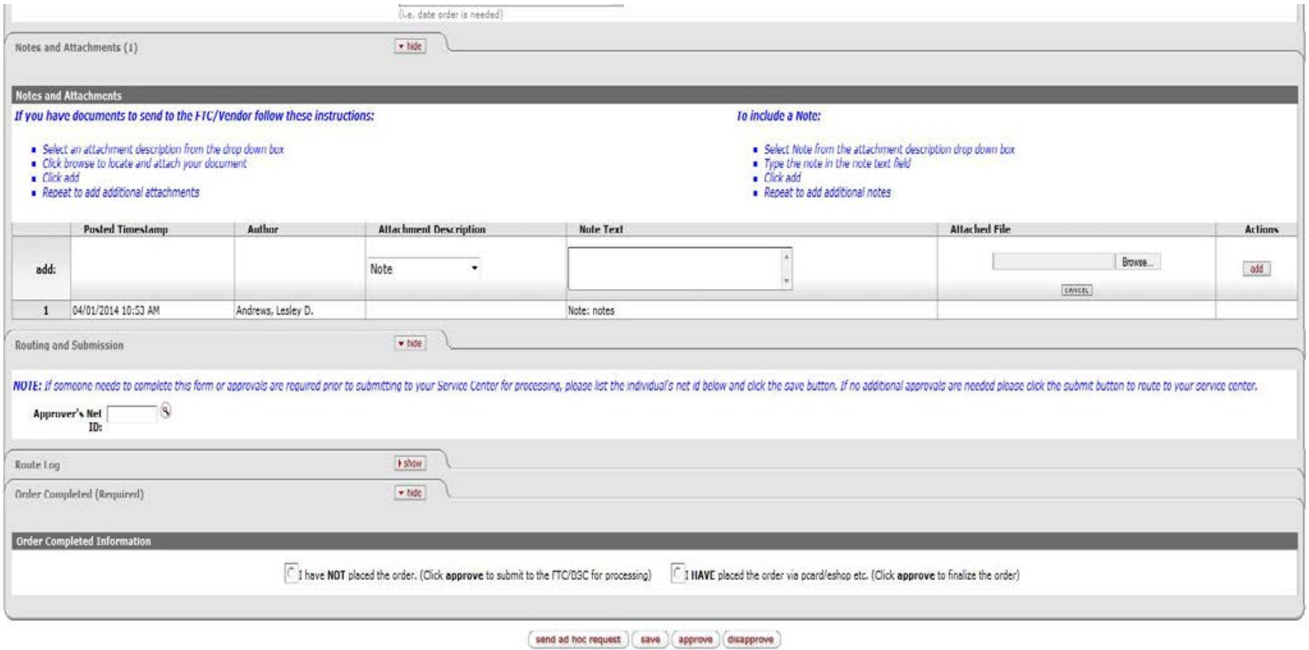
- Federal Procurement Contracts:
  - Units must retain original documents for twelve months for "federal procurement contracts." This guidance is based on federal laws, regulations, and interpretations currently in effect.
- All "other" paper originals:
  - Units may apply a shorter two month (60-days) retention period for all other originals.
- Units can apply the "twelve-month" guideline to all scanned documents if "one rule" is easier to administer.

Click ***Continue*** at the bottom of the page

Fields:

- **Routing and Submission**
  - The I Want Doc is able to be routed to other individuals prior to submission to the FTC/BSC for processing. Reasons for ***"optional"*** routing may include:
    - Another individual may need to complete the I Want Doc by providing account, vendor, etc.
    - Used to obtain Supervisor or Department/Unit Approval
    - An individual in Department may be able to order using e-SHOP or place on an individual Unit PCard.
  - If <u>no</u> additional approval is needed:
    - Click the Submit button at the bottom of the page. The I Want Doc will route to your FTC/BSC.
  - If additional approval is needed:
    - Enter the individual's NetID or to lookup an individual
    - Click on the magnifying glass, enter the individuals name
    - Click search and when found, click return value
    - Click the Save button

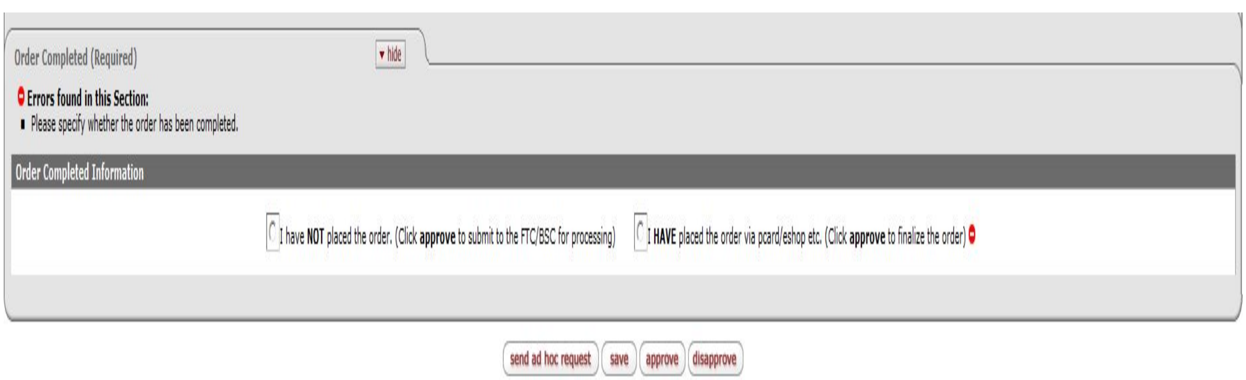
NOTE: If you enter an approver NetID, the I Want doc will remain in that person's Cynergy queue until action has been taken by that individual.



I Want Doc Approver

If the I Want Doc is routed to an approver, after reviewing the I Want Doc, the approver must select one of the two radio buttons before clicking "Approve".

- I have **NOT** placed the order (Click **Approve** to submit to the FTC/BSC for processing)
- I **HAVE** placed the order via PCard/e-SHOP (Click **Approve** to finalize the order)



NOTE: If a radio button is not selected, the I Want Doc will error and require the approver to select one of the radio buttons.