

# Procurement Gateway & I Want Doc User Guide

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

## Procurement Gateway

The screenshot shows the Cornell Procurement Gateway homepage. At the top, there is a red header with the Cornell University logo and a search bar. Below the header, the main content area is divided into several sections. On the left, there are four main navigation buttons: 'I WANT DOC' (Request Goods and Services), 'PROCUREMENT WIZARD' (How to Buy?), 'e-SHOP' (Cornell University Online Buying), and 'SHOPPING INFO' (Find Vendor or Item). Below these is a 'coming soon' banner and a 'HOW TO FAST TRACK' button. The main content area on the right features a 'Procurement Services Home' section with a welcome message for Amy Maria Arsenault, contact information for the University & Small Academic Business Service Center, and a dropdown menu to select an FTC/BSC for email notifications. To the right of this is a 'My Procurement Options' box showing user roles and a pcard limit. Below that is a 'My Orders' section with search filters for eDoc#, Vendor, and dates, and a 'Get Orders' button. A table displays one record for a requisition on 2/28/14. At the bottom, there are links for 'Procurement Home', 'Contact Us', and 'Site Feedback', along with a copyright notice for 2014 Cornell University.

**Cornell University** Search Cornell

### Cornell Procurement Gateway

**I WANT DOC**  
Request Goods and Services

**PROCUREMENT WIZARD**  
How to Buy?

**e-SHOP**  
Cornell University Online Buying

**SHOPPING INFO**  
Find Vendor or Item

*coming soon*

**HOW TO FAST TRACK**  
Your e-Shop Purchases

**Procurement News**

- [Recyclemania 2014: Annual Electronics Recycle Event](#)
- [New resources and targeted campaigns highlight Procurement Services? sustainability efforts](#)
- [Process Improvements ? New e-SHOP Fast Tracks deliver easy access to frequently ordered items](#)
- [Have a sustainable water-cooler conversation](#)
- [Dell named a strategic preferred supplier, services added](#)

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**Procurement Services Home**  
Welcome Amy Maria Arsenault

Questions? Contact your primary FTC/BSC: [University & Small Academic Business Service Center](#) or

Select FTC/BSC to send email:  
Select FTC/BSC

**My Procurement Options ?**

You are an **I Want Doc** User  
You are an **e-SHOP** User  
You are a **pcard** holder ?  
With \$133288.40 in charges against your monthly pcard limit.

**My Orders**

eDoc#:  Vendor:  From Date: 01/03/2014 To Date: 04/03/2014  
Item Description:

Total Records found: 1

Date	eDoc#	Type	Description	Vendor	Status	Amount	Copy	Log
2/28/14	<a href="#">5082082</a>	Requisition	Requisition - Darl Zehr Tri-Service Ball 2.20.14	Darl Zehr Photography	Final	400.00		

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:

<b>Saved</b>	Document was saved by the Requestor prior to routing.
<b>Enroute</b>	Document was routed and is pending approval requests.
<b>Final</b>	Document has received all required approvals and the FTC/BSC has processed the order.
<b>Disapproved</b>	Document has been disapproved by an approver during the routing process.
<b>Cancelled</b>	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

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## 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

Welcome to the I Want Doc! Submit your order request in just 4 easy steps.  
I Want Document Step #1 ?

Doc Nbr: 5204190	Status: INITIATED
Initiator: gao3	Created: 01:10 PM 03/25/20

Document Overview

\* Document Description: IT-6104

\* Business Purpose:

**NOTE:** The Business Purpose should tie the purchase to the account being charged; what is being purchased, why it is being purchased, how it will be used.

- Not an adequate Business Purpose = "Lab Supplies"
- Adequate Business Purpose = "Electronic components for sample analyzer used in Prof. Smith's XYZ project (or OSP 12345)."

Organization Information

**NOTE:** Please select the college and department for which you are entering this request.

\* College/Division:  \* Department/Unit:  Set as Default:

Requestor Deliver To

Requestor's Net ID: <input type="text" value="gao3"/> Guemsey, Sherry A.	Same as Requestor: <input type="checkbox"/>	Set as Default: <input type="checkbox"/>
Requestor's Phone Number: <input type="text" value="607-255-9361"/>	Deliver to Net ID: <input type="text"/>	
Requestor's Email: <input type="text" value="gao3@cornell.edu"/>	Deliver to Phone Number: <input type="text"/>	
Requestor Address: <input type="text" value="East Hill Plaza, 341 Pine Tree Rd&lt;br/&gt;Ithaca&lt;br/&gt;NY&lt;br/&gt;14850"/>	Deliver to Email: <input type="text"/>	
	Deliver to Address: <input type="text"/>	

### 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

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- 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**
  - 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**
  - This is the person the order should be delivered to.
  - If the Requestor and Deliver to person is the same, please check "Same as Requestor" and the delivery information will pre-populate.
    - 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:
  - List the person's NetID and hit enter. Their information will prefill. You may edit the information if necessary.
  - Manually enter the shipping information.
  - 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

I Want Document Step #2 Doc Nbr: 5204190 Status: INITIATED  
Initiator: sgn Created: 01:10 PM 03/25/20

Items & Account Info hide

Add Item hide

Description:	Item Quantity:	UOM:	Catalog #:	Unit Cost:	Total Amount:	Action
		EA			0.00	add item

Current Items

No items added

Totals

Total: 0.00

Account hide

Account Information

NOTE: If you do not know the specific account number to be charged, please provide information in the account description box below (i.e. NSF research account, salary recovery account).

Account Description:

or

Chart Code:	Account Number:	Sub Account Code:	Object Code:	Sub Object Code:	Project Code:	Organization Reference Id:	Amount or Percent:	Amount/Percent Value:	Action
IT							Percent	100.00	add acct

Current Accounts

No accounts added

Totals

Total: 0.00  
Remaining Total Needing an Account: 0.00

back continue save cancel

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## 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.

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

I Want Document Step #3 Doc Nbr: 5204190 Status: INITIATED  
Initiator: 2223 Created: 01:10 PM 03/25/20

**Vendor** hide

**Vendor Info**

*NOTE: Please provide as much Vendor information as you can, if you do not know the Vendor please leave blank*

Vendor Name:

Vendor Contact Information:

**Additional Info** hide

**Services**

If procuring services, will service be performed on campus:

**Miscellaneous**

Comments/Special Instructions:   
(i.e. date order is needed)

**Notes and Attachments (0)** hide

**Notes and Attachments**

*If you have documents to send to the FTC/Vendor follow these instructions:*

- Select an attachment description from the drop down box
- Click browse to locate and attach your document
- Click add
- Repeat to add additional attachments

*To include a Note:*

- Select Note from the attachment description drop down box
- Type the note in the note text field
- Click add
- Repeat to add additional notes

	Posted Timestamp	Author	Attachment Description	Note Text	Attached File	Actions
add:			Note	<input type="text" value=""/>	<input type="text" value=""/> Browse...	add

### 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

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- 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 no 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

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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.e. date order is needed)

Notes and Attachments (1)

**Notes and Attachments**

**If you have documents to send to the FTC/Vendor follow these instructions:**

- Select an attachment description from the drop down box
- Click browse to locate and attach your document
- Click add
- Repeat to add additional attachments

**To include a Note:**

- Select Note from the attachment description drop down box
- Type the note in the note text field
- Click add
- Repeat to add additional notes

	Posted Timestamp	Author	Attachment Description	Note Text	Attached File	Actions
add:			Note		<input type="text"/> Browse...	<input type="button" value="add"/>
1	04/01/2014 10:53 AM	Andrews, Lesley D.		Note: notes	<input type="button" value="CANCEL"/>	

Routing and Submission

**NOTE:** If someone needs to complete this form or approvals are required prior to submitting to your Service Center for processing, please list the individual's net id below and click the save button. If no additional approvals are needed please click the submit button to route to your service center.

Approver's Net ID:

Route Log

Order Completed (Required)

**Order Completed Information**

I have **NOT** placed the order. (Click **approve** to submit to the FTC/BSC for processing)  I **HAVE** placed the order via pcard/eshop etc. (Click **approve** to finalize the order)

## 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)

Order Completed (Required)

**Errors found in this Section:**

- Please specify whether the order has been completed.

**Order Completed Information**

I have **NOT** placed the order. (Click **approve** to submit to the FTC/BSC for processing)  I **HAVE** placed the order via pcard/eshop etc. (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.