PROCUREMENT:
HOW DO I PURCHASE OFFICE SUPPLIES?

Introduction

The procedure for requisitioning and purchasing Office Supplies (such as paper, toner, pens and pencils, staples, etc.) can be completed online if the Requisitioner has the required authorization for the total dollar amount of the purchase.

NOTE: If the Requisitioner does not have the required authorization, they must request that someone with the required authorization complete the Purchase Requisition procedure. Deans, Chairpersons, Directors, and Administrators are authorized to approve expenditures of University funds based upon prior approved budgets. Principal investigators (PIs) are authorized to approve expenditures of restricted funds based upon prior approved budgets.

No purchases can be made without prior approval and verification of the availability of funds. Procurement Services will only issue an official Purchase Order when the Purchase Requisition has been previously approved by an authorized signatory.

There are two types of orders that can be processed through the Purchasing Requisition On-line System (Jacada) and SciQuest, which is embedded in Jacada as part of the purchasing procedure—University Funded Orders and Grant Orders.

UNIVERSITY FUNDED ORDERS

Purchase Requisitions for University Funded Orders are primarily used to purchase items that University staff will use in areas such as Education, Clinical Programs, etc. and are not applicable to grants issued by federal, state, or city governments, Medicaid, Medicare, NIH, etc.

Individual item expenses of $5,000 or less require only department approval; item expenses greater than $5,000 require approvals as follows:

Approval Chart for Manhattan Campuses and Einstein

<table>
<thead>
<tr>
<th>Dollar Amount</th>
<th>MC Approver</th>
<th>Einstein Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,001 - $100,000</td>
<td>Dept. Finance Administrator</td>
<td>Asst. Director of Finance</td>
</tr>
<tr>
<td>$100,001 - $250,000</td>
<td>Director of Budgeting and Mgmt. Reporting</td>
<td>Asst. Director of Finance</td>
</tr>
<tr>
<td>$250,001 - $500,000</td>
<td>Executive Director of Financial Services</td>
<td>Director of Finance</td>
</tr>
<tr>
<td>$500,001 - $1,000,000</td>
<td>CFO or designee</td>
<td>Assoc. Dean for Finance and Administration</td>
</tr>
<tr>
<td>&gt; $1,000,000</td>
<td>CFO and Board</td>
<td>CFO and Board</td>
</tr>
</tbody>
</table>

This flow of approvals is designed to decrease the amount of time it takes for a requisition to be processed. Sending requisitions directly to the office responsible for funding approval allows Procurement Services to receive a completely approved requisition, thus expediting receipt of needed office supplies and services.
GRANT FUNDED ORDERS

The purpose of Grant funds is to further the research conducted by Principal Investigators (PIs). Purchase orders encumbered against Grant funds are made in order to fulfill the purpose and objective of Grant awards and need not be sent to the Finance Department for approval.

PLACING THE ORDER

Pricing must be obtained prior to funding approval—catalog or quoted pricing is sufficient (indicate the source of the information on the requisition in the Notes Section). Procurement Services will verify the price while placing the order. Requisitions cannot be completed in Jacada without pricing and a valid 8-digit funding code to identify the activity to be charged (signifying that funds are available), and correct 3-digit object code¹ to explain the purpose of the transaction. If help is needed with the 11-digit funding code, contact the appropriate Finance Office. If there is uncertainty about a price or from whom a commodity is available, contact the individual in Procurement Services responsible for that commodity.

PURCHASING OPTIONS

There are several acceptable procedures that can be used to purchase office supplies such as paper, toner, pens and pencils, staples, etc.) that are discussed in this document:

- SCIQUEST CAT
- REGULAR
- REGULAR – Vendor is not on the List of Approved Vendors
- NEW & EXISTING CONTRACTS
- OPEN FORMAT
- ASSIGN CART

WHAT IS SCIQUEST?

SciQuest is a portal to the University’s marketplace with preferred catalog pricing from a number of large vendors – Dell, Apple, B&H, Barnes and Noble, Staples, Fisher Scientific, etc. If you have access to Jacada, you also have access to SciQuest.

SCIQUEST OPTIONS

SCIQUEST CAT is selected when only departmental approval is required. While there is no total dollar limit for Purchase Requisitions processed in SCIQUEST CAT, no single item may cost more than $3,000 or the Purchase Requisition will need to go out to bid through Procurement Services.

SCIQUEST UNV

The system defaults to SCIQUEST UNV if the purchase is more than a specific dollar amount, depending on the item’s Object Code. For these items, the Requisitioner would need to obtain Finance’s approval.

¹ A complete list of Object Codes can be found in Appendix A of this document <<to be added to Final Draft>>
SCIQUEST REG
The system defaults to SCIQUEST REG if hazardous chemicals or radioactive materials are being purchased. For these items, the Requisitioner will need to obtain the Safety Officer’s approval.

HOSTED VENDOR
Hosted vendors are in the system and supply SciQuest with their price files that allow the Requisitioner obtain the best price. There are approximately 370 hosted vendors in the SciQuest system.

REGULAR
Regular is selected if (a) the vendor is not available on SciQuest, (b) if the item is not needed quickly, or (c) if there is a current quotation for the item from the vendor. Within the Regular ordering procedure, Quick Orders and Rush Orders can be selected for quicker delivery if certain criteria are met:

QUICK ORDERS
Quick Orders that total $500 or less from approved vendors do not require prior funding approval. The procedure for requisitioning and purchasing office supplies can be completed online if the Requisitioner has the required authorization for the total dollar amount of the purchase. A Purchase Order number can be assigned and the order created and phoned in by the requesting department.

All Quick Orders must be entered into Jacada with a correct funding source in order to be assigned a Purchase Order number. If there is uncertainty about pricing or from which vendor a commodity is available, contact the individual in Procurement Services who is responsible for that commodity. Names and telephone numbers of these individuals are available on the Procurement Services website.

NOTE: Quick Orders may be submitted for all office supplies. However, Quick orders are not permitted for purchasing computers, photographic equipment, electronics, software requiring a license agreement, hazardous chemicals, radioactive materials, consultants, or any standing or blanket purchase order.

RUSH ORDERS
Rush Orders that are less than $7,500 and do not have attached contracts or special requirements take 2-3 business days to process (Regular Orders with dollar amounts exceeding $7,500 may take up to 10 business days due to the additional required bidding process).

NOTE: Rush Orders must contain a statement describing why the order requires a rush delivery (e.g., overnight shipping, special pricing, the grant expires the following day, etc.). Unless otherwise indicated by the Requestor in Jacada, all Rush Orders are shipped using USPS Express mail. Failure to select a shipping carrier will result in Procurement Services selecting the shipping method, which may not be the Requestor’s first choice.

Processing a Rush Order is Procurement Services' authorization to charge back the additional shipping cost to the Requisitioner’s G/L account.

Rush Orders that need to be received the following day (other than Fisher Scientific) must be sent to Procurement Services with the appropriate paperwork and approvals no later than 2:00 PM (for example, for Wednesday delivery, paperwork and approvals must be submitted before 2:00 PM Tuesday).
REGULAR – VENDOR IS NOT ON THE LIST OF APPROVED VENDORS
This option is selected if the Requisitioner has been unsuccessful in finding the vendor’s name in the list of approved vendors in the system. The unlisted vendor may offer a product or service that other approved vendors may not offer. However, there may be other restrictions (e.g., completion of a W-9, vendor’s terms & conditions, investigation of Excluded Parties List System, etc.) regarding the purchasing of equipment from these vendors. Procurement will add the vendor into Jacada as a ‘new vendor’ after the review process has been completed.

CONTRACT
CONTRACT is selected if the purchase is being made under a new or existing contract.

OPEN
The OPEN format is selected if the purchase is made against an existing blanket or standing order, or for a vendor requiring partial payment for an expensive item (e.g., refrigerator, freezer).

ASSIGN CART
ASSIGN CART should be selected when a Researcher or Technician selects items online and places them in a shopping cart; a department staff person (usually a secretary) with access to Jacada completes the order in SciQuest.

CONFIRMING ORDERS
A confirming order occurs when a department wishes to place an order for a needed item or service without subjecting the purchase to the normal University purchasing procedures. Confirming orders are permitted only in emergency situations. Examples of emergencies are a University-owned motor vehicle in need of immediate road repair, emergency equipment repairs, and other situations resulting from unforeseen circumstances. Poor planning or poor management are not acceptable reasons for placing a confirming order. The Chief Procurement Officer is responsible for the interpretation of “emergency situations.” The nature of the emergency should be stated in the Notes section and approved by the Department Head (for University purchases) or the Principal investigator (for grant purchases).

If an emergency condition exists that warrants a confirming order, the following procedure is to be utilized when the emergency exceeds $500 (where a Quick Order can be used). An emergency purchase order number must be obtained from Procurement Services prior to placing the order with the vendor. Enter your request electronically into Jacada, call Procurement Services at (718) 430-3001 giving specific information regarding your order (i.e., Requisition Number) to Procurement Services personnel, who will complete the order and issue an emergency purchase order number after financial approval has been obtained from Grant Accounting.

When an emergency purchase order number is requested for repairs or service, the requisition should be submitted by the Department Administrator after the service has been completed and the service report forwarded to Procurement Services. The vendor should be asked to mail the invoice showing our purchase order to Yeshiva University, Accounts Payable Office, for processing and payment.

Note: Individuals requesting Emergency Purchase Order numbers for confirming orders who abuse the system through excessiveness or lack of follow-up documentation, will forfeit their ability to use the emergency system.
Completing the Purchase Requisition Through SciQuest
COMPLETING THE PURCHASE REQUISITION  
SciQuest – Including Punch-out SciQuest Vendor Orders

After logging-on to the Purchase Requisition On-Line System (Jacada) and bringing up the Purchase Order System Menu screen, the Requisitioner performs the following steps:

Select the Requisition Menu option ① and clicks Ok ② (in the far-left column).

![Figure SCI-1](image)

The Create Requisition screen is displayed.

![Figure SCI-2](image)
Select the appropriate **Req/Po Type** from the drop-down menu (for this example, **SCIQUEST CAT** is selected).

![Figure SCI-3](image)

Enter the **General Ledger Number** and click **Ok**.

![Figure SCI-4](image)

**Note:** If the requisition has more than one G/L number associated with it, they should be listed in sequence on this screen. If additional screens are needed to list G/L numbers, change **More GL No.** to **Yes**.
Note: An error message will appear if an invalid G/L number is entered (Figure SCI-4a) or if the G/L number entered is for a funded project that has a zero or negative net free balance and a continuation of funding has not been approved.

The Update Ship to Information screen is displayed.
Select the appropriate destination and address from the **Ship To** drop-down menu.

![Figure SCI-6](image)

Select the name of the person to whom the supplies are being delivered on the **Attn. Name** drop-down menu.

![Figure SCI-7](image)
The following screen illustrates the fields that should be displayed. If the information on the screen is correct, click Ok.

Figure SCI-8

The **Update Requisition Header** screen is displayed. Jacada inserts an Object Code based on the **SCIQUEST CAT** selection from the drop-down menu and is subject to change, depending on the G/L account.

Figure SCI-9
Select the **SciQuest** button in the lower-left corner to move from Jacada to SciQuest.

![Image of SciQuest interface]

**Note:** DO NOT click the **OK** button on the **SciQuest Higher Markets** pop-up at this time.
Punch-out Vendors

Punch-out vendors (whose names appear on Figure SCI-11) are suppliers that have been approved by Yeshiva University to supply merchandise and services and allow the Requisitioner to be linked directly to these vendors’ websites. The system contains all vendor information necessary to complete a Purchase Requisition. Selecting a supplier’s button will bring the Requisitioner to that supplier’s home page.

As an example, Yeshiva University has contracted with Staples Advantage (“Staples”) to be the University’s primary vendor for office supplies.

![Figure SCI-11](image)

The Redirect screen to the vendor’s website is displayed. Select the Yes button in the Security Information pop-up to be linked to the Staples website.

![Figure SCI-12](image)

**Note:** The Requisitioner may exit the punch-out program at any time during the ordering process by clicking the Cancel Punch-out button in the upper right corner.
The following screen illustrates Staples’ web page for ordering office supplies.

For this example, the Requisitioner is placing an order for one box of Staples copy paper. **Copy paper** is typed in the text field next to the Search button and the Search button is selected.
The following screen illustrates the search results for Staples copy paper. To order one box, select the **Add to Order** button (at the bottom of the screen), then click the **Submit** button (at the top of the screen).

Figure SCI-15
**Note:** Ordering an item costing less than $35.00 will result in the following **Savings Message** being displayed. In order to place an online order with Staples, the Requisitioner would need to order another carton of paper or additional office items to bring the total over $35.00.

![Savings Message](image)

For this example, one additional carton of paper will be ordered.
In the following screen, the **Quantity** has been changed to ‘2’. Select the **Update Order** button to approve the addition of one carton of paper.

![Figure SCI-17](image)

Because the total amount of the purchase now exceeds the $35.00 required minimum, the Staples Advantage program allows the order to be processed. Select the **Submit** button.

![Figure SCI-18](image)

**Important Note:** No changes can be made after leaving the Staples website and returning to SciQuest. If it is necessary to revise the Purchase Requisition after returning to SciQuest, the entire order will need to be deleted and the item(s) re-entered (starting at Figure SCI-11).

The following screens (Figures SCI-19a, SCI-19b, and SCI-19c) illustrate the steps that must be taken to delete items before the **Submit to PROS** button is selected (Figure SCI-20) when the Purchase Requisition needs to be amended.

If the order information is correct, continue processing the order at Figure SCI-20.
To delete items in the cart, double-click the boxes next to Ext. Price and USD amount and click the For selected Items drop-down menu. Select Remove Selected Items on the drop-down menu.

Click the Go button to remove the selected items from the Purchase Requisition.
The following screen illustrates that the selected items have been removed from the Purchase Requisition. Clicking the **Add Products** button displays the SciQuest home page (Figure SCI-11). Select the item(s) being ordered (Figure SCI-13 through Figure SCI-18).

![Figure SCI-19c](image)

The following screen illustrates the order that has been submitted through the Staples Advantage program. After reviewing it for accuracy, select the **Submit To PROS** button.

![Figure SCI-20](image)
Note: The following screen may or may not be displayed, depending on the item(s) ordered. If it is, disregard the first option and select the second option, Continue to this website (not recommended).

Click the Close Screen box in the upper-right corner to return to Jacada.
The **SCIQUEST CAT Update Requisition Header** screen is displayed. Click the **OK** button in the **SciQuest Higher Markets** pop-up.

![Figure SCI-23](image)

Based on the order that was placed, a message may appear at the top of the screen (Figure SCI-24) that the G/L **Object Code** was changed (from the G/L **Object Code** that was previously entered).

**Note:** This message will not be displayed if the G/L **Object Code** previously entered was correct.

![Figure SCI-24](image)

The Requisitioner has the option of viewing the items ordered (prior to creating the Purchase Requisition) by selecting the **Items** tab.

**Note:** If the Requisitioner does not wish to review the item(s), they can create the Purchase Requisition at this time by selecting **Yes** (**) for the **Create Requisition** option and clicking **Ok** ( **) .
After reviewing each item’s details on the **Update Requisition Items** screen and verifying that the information is correct, select the **Header** tab to return to the **Update Requisition Header** screen.

Figure SCI-25

The **Update Requisition Header** screen is displayed below with the option to create the Purchase Requisition. If the description of the items ordered on the **Update Requisition Items** screen is accurate, select **Yes** next to the **Create Requisition** option, then click **Ok** to create the Requisition.

Figure SCI-26

**Note:** If the information on the **SCIQUEST CATALOG ORDER** screen is not correct, select **NO** on the **Create Requisition** option. Because it is not possible to revise the items listed (Figure SCI-25), the Requisitioner will need to return to their shopping cart in SciQuest, delete all item(s) in the cart, and return to the Staples Advantage web page (Figure SCI-11) to enter the items correctly.
After the Yes option has been selected to create the Purchase Requisition, the Select User screen is displayed (Figure SCI-27).

Type the last name (surname) of the person approving the Purchase Requisition in the User Name field ① and select the Search button ②.

![Figure SCI-27](image)

Jacada displays the full name of the Approver. If the name is correct, double-click the box in the Select User column next to the Approver’s name ① and click Ok ②.

![Figure SCI-28](image)

**Note:** Send To Purchasing is an “Approver” field and this box should not be selected by the Requisitioner.
Jacada asks for confirmation that the Purchase Requisition is to be sent to the person (Approver) whose name appears in the **User Name** field. If the Approver’s name is correct, select **Yes** and click **Ok**.

![Figure SCI-29](image)

This screen confirms that a Purchase Requisition was created and forwarded to the Approver (in this example, Annette T. Zerbo). The Requisitioner can view or print the Requisition for their records.

![Figure SCI-30](image)

**Note:** The Approver can create a Purchase Order from the Purchase Requisition or forward the Purchase Requisition to Finance or Procurement Services if additional approvals are required (depending on the item(s) purchased and their cost).
Completing the Purchase Requisition as a Regular Order (Jacada)
COMPLETING THE PURCHASE REQUISITION

Regular Order (Jacada)

After logging-on to the Purchase Requisition On-Line System (Jacada) and bringing up the Purchase Order System Menu screen, the Requisitioner performs the following steps:

Select the **Requisition Menu** option ¹ and clicks **Ok ²** (in the far-left column).

![Create Requisition Screen](image1)

The **Create Requisition** screen is displayed.

![Create Requisition Screen](image2)
Select the appropriate **Req/Po Type** from the drop-down menu (for this example, **REGULAR** is selected).

![Create Requisition](image)

**Figure REG-3**

**Note:** Selecting **QUICK** in the drop-down menu (for Quick orders) results in the same processing screens as **REGULAR** orders, but make certain that the requirements for Quick orders (detailed in the **Introduction** of this document) are met before making this selection.

Enter the **General Ledger Number** ✗ and click **Ok** ✖.

![Create Requisition with General Ledger Number](image)

**Figure REG-4**

**Note:** If the requisition has more than one G/L number associated with it, they should be listed in sequence on this screen. If additional screens are needed to list G/L numbers, change **More GL No.** to **Yes**.
Note: An error message will appear if an invalid G/L number is entered, or if the G/L number entered is for a funded project that has a zero or negative net free balance and a continuation of funding has not been approved.

The **Update Ship to Information** screen is displayed.
Select the appropriate destination and address from the **Ship To** drop-down menu.

![Image](image1.png)

**Figure REG-6**

Select the name of the person to whom the supplies are being delivered on the **Attn. Name** drop-down menu.

![Image](image2.png)

**Figure REG-7**
The following screen illustrates the fields that should be displayed. If the information on the screen is correct, click **Ok**.

![Figure REG-8](image)

**Figure REG-8**

The **Update Requisition Header** screen is displayed.

![Figure REG-9](image)

**Figure REG-9**
Type the Vendor’s name in the text field and select the Search button.

Select the vendor’s name from the Suggested Vendor drop-down menu...

**Note:** The vendor number is displayed in the Po Vendor field after the vendor is selected.
Select the Commodity Group Name and Code from the **Commodity Group** drop-down menu.

**Figure REG-12**

The following screen displays the vendor contact (**Vndr Contact**) information associated with the selected vendor.

**Figure REG-13**
Select the delivery date from the Required Date drop-down menu \( \textcircled{1} \) and click Ok \( \textcircled{2} \).

![Figure REG-14](image)

**Note:** Date information is only required if a specific delivery date is required (e.g., for a Rush order); if not, this field can be left blank.

Select the shipping carrier from the Ship Via drop-down menu \( \textcircled{1} \) and click Ok \( \textcircled{2} \).

![Figure REG-15](image)

**Note:** Selecting AIR, AIRBORNE, FEDEX, or OVERNIGHT will result in Procurement Services assessing additional charges against the grant.
If the information on the screen is correct (Figure REG-15), click Ok and the Update Requisition Items screen is displayed (Figure REG-16).

![Update Requisition Items Screen]

Figure REG-16

After item information (i.e., Quantity, Unit of Measurement, Unit Price, Catalog Number, whether the item is a chemical) is entered on the screen, a Warning pop-up is displayed after the final item (up to three on a screen) is entered. Select the No button, then click Ok in the left column to update the changes to the Update Requisition Items screen (Figure REG-16). The Warning pop-up will repeat until the last item on the final screen is processed.

**Note:** Do not type a decimal point when entering the Unit Price – for 15.00, type 1500.

For a single entry or the last entry on the final screen, click Ok ①, click the Header tab ②, then click Yes ③ on the Warning pop-up. The Update Requisition Header screen (Figure REG-18) will be displayed.

![Update Requisition Header Screen]

Figure REG-17
**Note:** Entering the **Catalog Number** of the item(s) being purchased will expedite processing the Purchase Requisition.

The **Update Requisition Header** screen is displayed with the option of creating the Requisition. If the information on the screen is correct, select **Yes** in the **Create Requisition** option and click **Ok** to create the Purchase Requisition.

![Figure REG-18](image)

After the **Yes** option is selected to create the Purchase Requisition, the **Select User** screen is displayed.

Type the last name (surname) of the person approving the Purchase Requisition in the **User Name** field and select the **Search** button.

![Figure REG-19](image)
Jacada displays the full name of the Approver. If the name is correct, double-click the box in the Select User column next to the Approver’s name and click Ok.

Note: Send To Purchasing is an “Approver” field and the box should not be selected by the Requisitioner.

Jacada asks for confirmation that the Purchase Requisition is to be sent to the person (Approver) whose name appears in the User Name field. If the Approver’s name is correct, select Yes and click Ok.

Figure REG-20

Figure REG-21
This screen confirms that a Purchase Requisition was created and forwarded to the Approver (in this example, Annette T. Zerbo). The Requisitioner can view or print the Requisition for their records.

Note: Additional approval(s) are required for Regular orders; the Approver cannot create a Purchase Order from the Purchase Requisition (exception: Quick Orders) but may forward the Purchase Requisition to Finance or Procurement Services if additional approvals are required (depending on the item(s) being purchased and their cost).
Completing the Purchase Requisition as a Regular Order When the Vendor is not on the List of Approved Vendors
COMPLETING THE PURCHASE REQUISITION

Regular Order – Vendor is not on the List of Approved Vendors

After logging-on to the Purchase Requisition On-Line System (Jacada) and bringing up the Purchase Order System Menu screen, the Requisitioner performs the following steps:

Select the Requisition Menu option ① and click Ok ② (in the far-left column).

The Create Requisition screen is displayed.
Select the appropriate Req/Po Type from the drop-down menu (for this example, REGULAR is selected).

![Image](image1.png)

**Figure REG-VNOL-3**

**Note:** The QUICK option is not available when the vendor’s name is not in the system.

Type the **General Ledger Number** ☐ and click **Ok ☐**.

![Image](image2.png)

**Figure REG-VNOL-4**

**Note 1:** If the requisition has more than one G/L number associated with it, they should be listed in sequence on this screen. If additional screens are needed to list G/L numbers, change **More GL No.** to **Yes.**
Note: An error message will appear if an invalid G/L number is entered (REG-VNOL-4a) or if the G/L number entered is for a funded project that has a zero or negative net free balance and a continuation of funding has not been approved.

The **Update Ship to Information** screen is displayed.
Select the appropriate destination and address from the **Ship To** drop-down menu.

![Image of the Ship To dropdown menu]

**Figure REG-VNOL-6**

Select the name of the person to whom the supplies are being delivered to on the **Attn. Name** drop-down menu.

![Image of the Attn. Name dropdown menu]

**Figure REG-VNOL-7**
The following screen illustrates the fields that should be displayed. If the information on the screen is correct, click **Ok**.

Figure REG-VNOL-8

The **Update Requisition Header** screen is displayed.

Figure REG-VNOL-9
The Requisitioner checks the **Suggested Vendor** drop-down menu to determine if the vendor’s name is in the system. If the vendor’s name is not listed on the menu, click **Cancel** to close the screen.

![Image](Image)

**Figure REG-VNOL-10**

Type the name of the vendor and their phone number in the **Suggested Vendor** and **Phone** fields.

![Image](Image)

**Figure REG-VNOL-11**

**Note:** If the vendor’s name and phone number are not entered as illustrated in Figure REG-VNOL-11, the Requisitioner will not be able to advance to the next screen.
For the **Commodity Description**, type “unknown” in the **Product descr.** field 🕵️‍♀️ and click the **Search** button 🕵️.

![Figure REG-VNOL-12](image)

Click the **Commodity Group** drop-down menu and select **UNKNOWN**.

![Figure REG-VNOL-13](image)
The following screen displays the vendor’s information.

Select the delivery date from the Required Date drop-down menu and click Ok.

Note: The Required Date drop-down calendar should only be selected if the Requestor requires a specific delivery date for their order (e.g., for a Rush order); if not, this field can be left blank.
Select the shipping carrier \( \mathbb{1} \) from the **Ship Via** drop-down menu and click **OK \( \mathbb{2} \)**.

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**Note:** Selecting **AIR**, **AIRBORNE**, **FEDEX**, or **OVERNIGHT** will result in Procurement Services assessing additional charges against the grant.

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If the information on the screen is correct (Figure REG-VNOL-16), click **Ok** and the **Update Requisition Items** screen is displayed (Figure REG-VNOL-17).

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After item information (i.e., Quantity, Unit of Measurement, Unit Price, Catalog Number, whether the item is a chemical) is entered on the screen, a **Warning** pop-up is displayed (Figure REG-VNOL-18) after the final item (up to three items on a screen) is entered. Select the **No** button, then click **Ok** in the left column to update the changes to the **Update Requisition Items** screen. The **Warning** pop-up will repeat until the last item on the final screen is processed.
Note: Do not type a decimal point when entering the Unit Price – for 15.00, type 1500.

For a single entry or the last entry on the final screen, click Ok, click the Header tab, then click Yes on the Warning pop-up. The Update Requisition Header screen (Figure REG-VNOL-19) will be displayed.

![Update Requisition Header](image)

Note: Entering the Catalog Number of the item(s) being purchased will expedite processing the Purchase Requisition.

The Update Requisition Header screen is displayed with the option of creating the Requisition. If the information on the screen is correct, select Yes in the Create Requisition option and click Ok to create the Purchase Requisition.

![Create Requisition](image)
After the **Yes** option is selected to create the Purchase Requisition, the **Select User** screen is displayed.

Type the last name (surname) of the person approving the Purchase Requisition in the **User Name** field and select the **Search** button.

![Select User](image1)

Jacada displays the full name of the Approver. If the name is correct, double-click the box in the **Select User** column next to the Approver’s name and click **Ok**.

![Select User](image2)

**Note:** **Send To Purchasing** is an “Approver” field and the box should not be selected by the Requisitioner.
Jacada asks for confirmation that the Purchase Requisition is to be sent to the person (Approver) whose name appears in the **User Name** field. If the Approver’s name is correct, select **Yes** and click **Ok**.

![Figure REG-VNOL-22](image)

This screen confirms that a Purchase Requisition was created and forwarded to the Approver (in this example, Annette T. Zerbo). The Requisitioner can view or print the Requisition for their records.

![Figure REG-VNOL-23](image)

**Note:** The Approver can create a Purchase Order from the Purchase Requisition or forward the Purchase Requisition to Finance or Procurement Services if additional approvals are required (depending on the item(s) being purchased and their cost).
Completing the Purchase Requisition from a New or Existing Order or Open Format
COMPLETING THE PURCHASE REQUISITION

New and Existing Contracts

If the purchase is being made under a New or Existing contract, choose CONTRACT from the drop-down menu (Figure REG-NEW-1).

![Figure REG-NEW-1](image)

**Note:** Subsequent screens would be identical to REGULAR orders, except the screens below (Figure REG-NEW-2 and Figure REG-NEW-3) would be replace Regular Order screens (Figure REG-9 through Figure REG-16), with the following fields being entered: **Contract Number, Total Contract Amount, Serial Number,** and **Period Contract Amount** (the unencumbered amount of the total contract for a period of time, usually one year). In addition, the delivery date and method of shipment screens (Figure REG-NEW-04 and REG-NEW-05) may be included.

![Figure REG-NEW-2](image)

**Note:** New contracts will **not** have Contract Numbers (Figure REG-NEW-2) or Serial Numbers (Figure REG-NEW-3) and these fields should be left blank; however, this information should be entered for Existing contracts.
Select the delivery date from the **Required Date** drop-down menu ₁ and click **Ok ₂**.

**Note:** The **Required Date** drop-down calendar should only be selected if the requestor requires a specific delivery date for their order (e.g., for a Rush order); if not, this field can be left blank.
Select the shipping carrier \( \) from the Ship Via drop-down menu and click OK \( \circ \).

Figure REG-NEW-05

**Note:** Selecting AIR, AIRBORNE, FEDEX, or OVERNIGHT will result in Procurement Services assessing additional charges against the grant.
COMPLETING THE PURCHASE REQUISITION

Open Format

If the purchase is being made under an Open Format (i.e., purchases are made against an Existing contract on a regular basis), choose OPEN from the drop-down menu (Figure REG-O-1).

![Figure REG-O-1](image)

**Note:** Subsequent screens would be identical to the REGULAR selection, except Figure REG-O-2 and Figure REG-O-3—showing the Start and End Dates of the contract—would replace the Update Requisition Header screen, Figure REG-14.

![Figure REG-O-2](image)
For an **Open Format** requisition, Figure REG-O-4 would replace the **Regular Order Update Requistion Items** screen, Figure REG-16.
Completing the Purchase Requisition Through Assign Cart
(Without and With Jacada Access)
COMPLETING THE PURCHASE REQUISITION
Assign Cart – For Users (Researcher/Technicians) Without Jacada Access

The procedure for requisitioning and purchasing office supplies (such as paper, toner, pens and pencils, staples, etc.) can be completed online utilizing Assign Cart.

The Assign Cart procedure is a two-phased process—initially, the Researcher/Technician logs into Assign Cart and selects the item(s) they wish to order. After the item(s) have been selected and placed in a “shopping cart,” they assign it to a department staff member (an “Assignee,” usually a secretary) who processes the order online via Jacada.

Researchers/Technicians are required to register before they can access Assign Cart. A tutorial on the Assign Cart procedure that allows them to register is located on the Procurement Services website, http://www.yu.edu/procurement/index.aspx?id=18486.
The following screen illustrates the **Assign Cart** login screen.

![Assign Cart login screen](image)

**Figure AC-1**

The Researcher/Technician enters their **User Name** and **Password** and clicks the **Go** button.

![Login screen](image)

**Figure AC-2**
The following screen displays all punch-out vendors² and highlights the Staples button, which should be selected to display that vendor’s web page.

Figure AC-3

The Redirect screen to the vendor’s website is displayed. Select the Yes button in the Security Information pop-up to be linked to the Staples’ website.

Figure AC-4

**Note:** The Requisitioner may exit the punch-out program at any time during the ordering process by clicking the Cancel Punch-out button in the upper right-hand corner.

² Punch-out vendors are suppliers that have been approved by Yeshiva University to supply merchandise and services and allow the Requisitioner to be linked directly to these vendors’ websites.
The following screen illustrates Staples’ web page for ordering office supplies.

![Figure AC-5](image)

For this example, the Requisitioner is placing an order for one box of Staples copy paper. **Copy paper** is typed in the text field next to the **Search** button and the **Search** button is selected.

![Figure AC-6](image)
The following screen illustrates the search results for Staples copy paper.
To order one box, select the Add to Order button (at the bottom of the screen), then the Submit button (at the top of the screen).

Figure AC-7
Note: Ordering an item costing less than $35.00 will result in the following message being displayed. In order to place an online order with Staples, the Requisitioner would need to order another carton of paper or additional office items.

For this example, one additional carton of paper will be ordered.
In the following screen, the Quantity has been changed to ‘2’. Select the Update Order button to approve the addition of one carton of paper.

![Figure AC-9](image)

Since the total amount of the purchase now exceeds the $35.00 required minimum, the Staples Advantage program allows the order to be processed. Select the Submit button.

![Figure AC-10](image)

**Important Note:** No changes can be made after leaving the Staples website and returning to SciQuest. If it is necessary to revise the Purchase Requisition after returning to SciQuest, the entire order will need to be deleted and the item(s) re-entered (starting at Figure AC-3).
The Assign Cart sub-screen is displayed (AC-11). The Researcher/Technician either selects the hyperlink ☑ for Select from profile values if they have an Assignee or Search for an assignee if they need to select an Assignee from the database.

For this example, the Researcher/Technician has previously worked with the Assignee and, because they are in the Researcher/Technician’s profile, the Assign button ☑ is clicked.

Figure AC-11

**Note:** If the Assignee is not in the Researcher/Technician’s profile, advance to Figure AC-13.

Select the Assignee from the drop-down menu.

Figure AC-12
The Assignee’s name appears next to Assign Cart To. If the Assignee’s name is correct, click the Assign button.

If the Researcher/Technician does not have the name of the Assignee in their profile, they would select Search for an assignee in the Assign Cart sub-menu.
The **User Search** screen is displayed.

![Figure AC-15](image1)

The Researcher/Technician types the Assignee’s last name (surname) in the **Last Name** field and clicks the **Search** button.

![Figure AC-16](image2)
In the Select column, click the button next to the name of the Assignee ①, then click the Choose Selected User button ②.

Figure AC-17

If this is the first time the Assignee’s name is selected (the Assignee is not in the Researcher/Technician’s profile, double-click the box next to Add to Profile so their name appears (their name will be added to the Researcher/Technician’s profile).

Figure AC-18
The Researcher/Technician may also type instructions to the Assignee regarding the order in the **Note to Assignee** text box. Click the **Assign** button to assign the cart.

![Figure AC-19](image)

The following screen confirms that the shopping cart has been assigned to the Assignee.

![Figure AC-20](image)

The Assignee receives an email via SciQuest that the Researcher/Technician has assigned a shopping cart to them, with item(s) that are ready to be ordered from the vendor. Unlike the Researcher/Technician, the Assignee can access Jacada and complete the Purchase Requisition procedure.
COMPLETING THE PURCHASE REQUISITION
Assign Cart – For Users (Assignees) With Jacada Access

The Assignee initiates a Jacada SciQuest Cat order (Figure AC-25) by selecting the Requisition Menu option ① and clicks Ok ② (in the far-left column).

![Figure AC-21](image)

The Create Requisition screen is displayed.

![Figure AC-22](image)
Select the appropriate **Req/Po Type** from the drop-down menu (for this example, **SCIQUEST CAT** is selected).

Type the **General Ledger Number** ☞ and click **Ok ☜**.

**Note:** If the requisition has more than one G/L number associated with it, they should be listed in sequence on this screen. If additional screens are needed to list G/L numbers, change **More GL No.** to **Yes.**
Note: An error message will appear if an invalid G/L number is entered (Figure AC-24a) or if the G/L number entered is for a funded project that has a zero or negative net free balance and a continuation of funding has not been approved.

The Update Ship to Information screen is displayed.
Select the appropriate destination and address from the **Ship To** drop-down menu.

![Image of Ship To menu]

**Figure AC-26**

Select the name of the person to whom the supplies are being delivered on the **Attn. Name** drop-down menu.

![Image of Attn. Name menu]

**Figure AC-27**
The following screen illustrates the fields that should be displayed. If the information on the screen is correct, the Requisitioner clicks **Ok**.

![Figure AC-28](image)

The **Update Requisition Header** screen is displayed. Jacada inserts an Object Code based on the **SCIQUEST CAT** selection from the drop-down menu and is subject to change, depending on the G/L account.

![Figure AC-29](image)
Select the SciQuest button in the lower-left corner to move from Jacada to SciQuest.

Note: DO NOT click the OK button on the SciQuest Higher Markets pop-up at this time.

The Assignee selects View My Orders from the Action Items menu. These are current and prior “shopping cart” orders that have been initiated by the Researcher/Technician.
The Assignee selects **Recently Completed** from the **Action Items** menu.

A list of recent requisitions from the Researcher/Technician is displayed (on the **My Recent Requisitions** screen). The Assignee selects the **draft carts** tab.
Select the **Shopping Cart Name** from **My Drafts** to begin processing the shopping cart order.

![Image](image1.png)

**Figure AC-4**

The item(s) in the shopping cart created by the Researcher/Technician is displayed. The Assignee selects the **Submit to PROS** button.

![Image](image2.png)

**Figure AC-35**
**Note:** The following screen may or may not be displayed, depending on the item(s) ordered. If it is, disregard the first option and select the second option, *Continue to this website (not recommended).*

Click the **Close Screen** box in the upper-right corner to return to Jacada.
The SCIQUEST CAT Update Requisition Header screen is displayed. Click the OK button in the SciQuest Higher Markets pop-up.

![Figure AC-38](image)

Based on the order that was placed through Staples, a message may appear at the top of the screen (Figure AC-39) that the G/L Object Code was changed (from the G/L Object Code that was previously entered).

**Note:** This message will not be displayed if the G/L Object Code previously entered was correct.

The Requisitioner has the option of viewing the items ordered (prior to creating the Purchase Requisition) by selecting the Items tab.

![Figure AC-39](image)

**Note:** If the Requisitioner does not wish to review the item(s), they can create the Purchase Requisition at this time by selecting Yes for the Create Requisition option and clicking Ok.
After reviewing each item’s details on the Update Requisition Items SCIQUEST CATALOG ORDER screen and verifying that the information is correct, select the Header tab to return to the Update Requisition Header screen.

The Update Requisition Header screen is displayed below with the option to create the Purchase Requisition. If the description of the items ordered on the Update Requisition Items is accurate, select Yes ☑ next to the Create Requisition option, then click Ok ☑ to create the Requisition.

Note: If the information on the SCIQUEST CAT screen is not correct, select NO on the Create Requisition option. Because it is not possible to revise the items listed (on Figure AC-44), the Researcher/Technician will need to return to their shopping cart in SciQuest to make the necessary corrections.
After the Yes option is selected to create the Purchase Requisition, the Select User screen is displayed.

Type the last name (surname) of the person approving the Purchase Requisition in the User Name field and select the Search button.

Figure AC-42

Jacada displays the full name of the Approver. If the name is correct, double-click the box in the Select User column next to the Approver’s name and click Ok.

Figure AC-43

Note: Send To Purchasing is an “Approver” field and the box should not be selected by the Assignee.
Jacada asks for confirmation that the Purchase Requisition is to be sent to the person (Approver) whose name appears in the User Name field. If the Approver’s name is correct, select Yes and click Ok.

This screen confirms that a Purchase Requisition was created and forwarded to the Approver (in this example, Annette T. Zerbo). The Requisitioner can view or print the Requisition for their records.

Note: The Approver can create a Purchase Order from the Purchase Requisition or forward the Purchase Requisition to Finance or Procurement Services if additional approvals are required (depending on the item(s) purchased and their cost).
Definitions/Actions by Field Name
## Definitions/Actions by Field Name

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Definition/Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu Option Details</td>
<td>Requisition No., PO Number, PO Revision Num. – Leave these fields blank.</td>
</tr>
<tr>
<td>Split Department:</td>
<td>The default is <strong>No</strong> when the purchase is for a single department. Select <strong>Yes</strong> if the amount of the Purchase Requisition is split between two or more departments (there is more than one G/L). The Requisition must be routed to the other department(s) for their approval.</td>
</tr>
<tr>
<td>Pay &amp; Appropriate</td>
<td>The default is <strong>No</strong>. Select <strong>Yes</strong> if Accounts Payable needs to review the invoice for a split department purchase or if the department wants to review the invoice(s) prior to payment.</td>
</tr>
<tr>
<td>Req/Po Type</td>
<td>Select <strong>REGULAR</strong> for orders with no specific delivery date or <strong>QUICK</strong> for orders with a specific delivery date. <strong>RUSH</strong> orders can be selected within <strong>REGULAR</strong> if the order meets the required criteria.</td>
</tr>
<tr>
<td>QUICK</td>
<td>Select if the purchase qualifies as a <strong>QUICK</strong> order.</td>
</tr>
<tr>
<td>REGULAR</td>
<td>Select if the purchase is not a <strong>QUICK</strong> order.</td>
</tr>
<tr>
<td>SCIQUEST CAT/REG/UNV</td>
<td>When ordering office supplies through SciQuest, SCIQUEST CAT must be selected. Do not select SCIQUEST REG or SCIQUEST UNV. If necessary, SciQuest will make the appropriate change to SCIQUEST REG or SCIQUEST UNV based on the item being purchased and its cost (if the item falls outside SCIQUEST CAT dollar limits).</td>
</tr>
<tr>
<td>Del</td>
<td>Double-click the box to delete the G/L number and information in that row.</td>
</tr>
<tr>
<td>General Ledger Number</td>
<td>The Requisitioner’s 11-digit department G/L number must be entered.</td>
</tr>
<tr>
<td>Percent</td>
<td>Enter the value of 100 [percent] for a single G/L number, 50 [percent] for each of two G/L numbers (if evenly split), or any combination of numbers that add up to 100 [percent] for multiple G/Ls. <strong>Note:</strong> This field may be left blank for single or multiple G/Ls if the percentages are split evenly among the G/Ls.</td>
</tr>
<tr>
<td>Dollars</td>
<td>The Requisitioner manually calculates and enters the dollar amount for each G/L number if they do not want the system to calculate the dollar amount(s).</td>
</tr>
<tr>
<td>Calculated Dollars</td>
<td>The system automatically calculates and enters the dollar amount equally if the Requisitioner does not calculate the dollar amount for each G/L manually.</td>
</tr>
<tr>
<td>Initial Net Free Bal</td>
<td>No action is required. If grant funds have not been allocated to purchase office supplies, a Purchase Requisition cannot be created.</td>
</tr>
<tr>
<td>Dept</td>
<td>The system enters this information.</td>
</tr>
<tr>
<td>Sub</td>
<td>The system enters this information if there is a sub-department.</td>
</tr>
<tr>
<td>More GL No.</td>
<td>The default is <strong>No</strong>. Select <strong>Yes</strong> if the screen has been populated and additional G/Ls are required (a new screen of unfilled rows is displayed).</td>
</tr>
<tr>
<td>Field Name</td>
<td>Definition/Action</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Percent Autocalc</td>
<td>The system performs the calculations automatically.</td>
</tr>
<tr>
<td>Ship To</td>
<td>The address the item(s) are being delivered.</td>
</tr>
<tr>
<td>Attn. Name</td>
<td>The name of the person receiving the delivery.</td>
</tr>
<tr>
<td>PI/Department Head Name</td>
<td>The name of the PI or Department Head.</td>
</tr>
<tr>
<td>Department Name/Tel #</td>
<td>The system enters this information based on the Requisitioner.</td>
</tr>
<tr>
<td>Opt Req. No.</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Suggested Vendor</td>
<td>Select the vendor from a drop-down menu of approved vendors.</td>
</tr>
<tr>
<td>Phone</td>
<td>The system enters this information based on the selected vendor.</td>
</tr>
<tr>
<td>Commodity Group</td>
<td>Select the most appropriate Commodity Group/Code from the drop-down menu.</td>
</tr>
<tr>
<td>Insurance</td>
<td>This is a Procurement Services option. The default is <strong>No</strong>.</td>
</tr>
<tr>
<td>Protocol No.</td>
<td>This field is only applicable for grants that require purchasing animals and/or animal-related items, (i.e., drugs). A Protocol Number must be issued by the Animal Institute Committee before the Requisitioner initiates the Purchase Requisition.</td>
</tr>
<tr>
<td>Transmit Mode</td>
<td>Leave blank.</td>
</tr>
<tr>
<td>Confirmation Only</td>
<td>The default is <strong>No</strong>. Select <strong>Yes</strong> to create a Purchase Requisition to pay an invoice when there is no Purchase Order number.</td>
</tr>
<tr>
<td>Bid Waiver</td>
<td>The default is <strong>No</strong>. Select <strong>Yes</strong> to waive the bidding process for items exceeding $7,500 (i.e., for sole source or specified vendor purchases).</td>
</tr>
<tr>
<td></td>
<td>A Request for a Waiver of Competitive Bid for grant purchases must be approved by the PI and Procurement Services for a bid to be waived.</td>
</tr>
<tr>
<td>Rush Order</td>
<td>The default is <strong>No</strong>. Select <strong>Yes</strong> if this is a Rush Order.</td>
</tr>
<tr>
<td>Required Date</td>
<td>This field is only completed when item(s) must be delivered by a specific date (e.g., Rush Order).</td>
</tr>
<tr>
<td>Start Date</td>
<td>This field is not accessible and left blank for <strong>Regular</strong> orders.</td>
</tr>
<tr>
<td>End Date</td>
<td>This field is not accessible and left blank for <strong>Regular</strong> orders.</td>
</tr>
<tr>
<td>Ship Via</td>
<td>Select the shipping carrier from the drop-down menu.</td>
</tr>
<tr>
<td>Qty</td>
<td>The quantity of the item being ordered.</td>
</tr>
<tr>
<td>U/M</td>
<td>The item’s unit of measurement (each, dozen, etc.).</td>
</tr>
<tr>
<td>Unit Price</td>
<td>The dollar unit cost of the item (per each, dozen, etc.).</td>
</tr>
<tr>
<td>Catalog Number</td>
<td>The item’s Catalog Number.</td>
</tr>
<tr>
<td>Chem</td>
<td>Select <strong>Yes</strong> from the drop-down menu if the item is a chemical; if it is not, select <strong>No</strong>.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Definition/Action</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create Requisition</td>
<td>Select <strong>Yes</strong> to create the Purchase Requisition or select <strong>No</strong> to stop the Requisition process.</td>
</tr>
<tr>
<td>User Name</td>
<td>The last name of the Approver.</td>
</tr>
<tr>
<td>Search (button)</td>
<td>Searches the Jacada database for the full name of the Approver.</td>
</tr>
<tr>
<td>Send To Purchasing</td>
<td>This is an “Approver” field – the box should not be selected by the Requisitioner.</td>
</tr>
<tr>
<td>Select “Yes” to Confirm</td>
<td>The default is <strong>Yes</strong>. Click <strong>No</strong> if additions/deletions/revisions are required prior to finalizing the Purchase Requisition.</td>
</tr>
<tr>
<td>Contract Number</td>
<td>The Contract Number for the Existing contact.</td>
</tr>
<tr>
<td>Total Contract Amount</td>
<td>The total dollar amount of the Existing contract.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>The Serial Number of the item being purchased. If the item does not have a Serial Number or it is not known, leave blank.</td>
</tr>
<tr>
<td>Period Contract Amount</td>
<td>The unencumbered amount of the total contract for a specific period of time – usually one year – for New and Existing contracts.</td>
</tr>
<tr>
<td>Delete</td>
<td>Double-click the box to delete the information in that row.</td>
</tr>
<tr>
<td>Delete</td>
<td>Double-click the box to delete the information in that row.</td>
</tr>
<tr>
<td>Total Item Dollars</td>
<td>The dollar amount for the Open Format order.</td>
</tr>
</tbody>
</table>