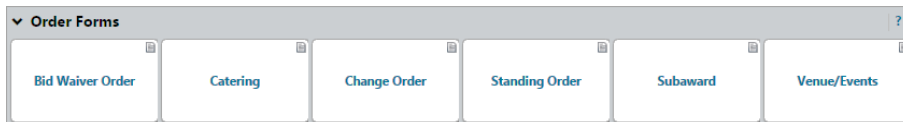


OVERVIEW OF ORDER FORMS

- ▶ **Bid Waiver Order Form:** Used for the purchase of supplies, equipment or services not under contract requiring the expenditure of funds in excess of \$10,000 (with the exception of Construction Services, which has a separate threshold).
- ▶ **Catering Order Form:** Used for all catering order requests from NYU's approved caterers. Caterers that are not approved are subject to further Procurement team review.
- ▶ **Change Order Form:** See Tip Sheet on Requesting a Change Order for more information.
- ▶ **Standing Order Form:** Used as justified for repetitive, specified services or items from the same supplier over period of up to one year, or on a monthly basis. See Tip Sheet on Requesting a Standing Orders for more information.
- ▶ **Subaward Form:** Replaces the Flextechs subaward invoice approval process. The format of this form has been designed to ensure the proper accounting structure is applied to the resulting purchase order.
- ▶ **Venue/Events Form:** Used for space and event-related expenditures. Requests must be submitted sufficiently in advance of the event to allow for any deposits or check requests to be processed.

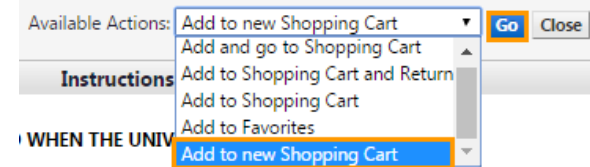
PREPARING A FORM

1. Log in to i-Buy NYU via the Work tab of NYU Home using your Net ID and password.
2. Within the Order Forms section, click on the appropriate button based on the type of request you are submitting.



3. The form will appear in a new window. All bolded fields require data entry or an attachment. The only exception to this rule is if the line item for your request is not applicable (e.g. Other Services on Catering Form, Alcohol on Venue/Events Form).
4. Enter the **Supplier's Name** (note, if your supplier cannot be found, you may need to submit a new supplier request). Supplier searches can be conducted using the supplier name, DBA or TIN. See appendix for required fields for each form type.

5. After completing each of the required fields, navigate to Available Actions, select **Add to new Shopping Cart** and click **Go**.

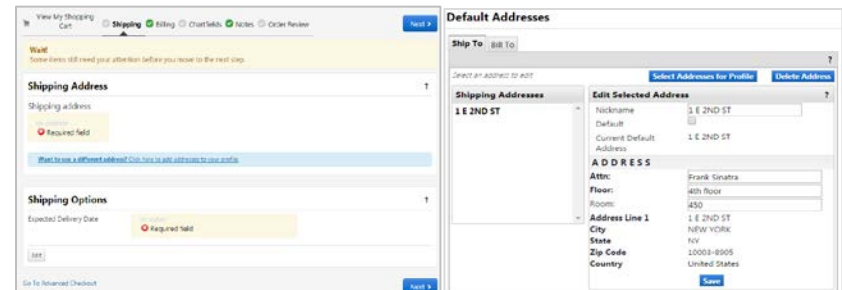


CHECKOUT PROCESS

1. Click the View Draft button to begin the checkout process.



2. The system will then walk you through a 5-step validation process. The first step involves Shipping. Upon your initial requisition effort, you will be prompted to add a shipping address to your profile. If your shipping address has already been defaulted, proceed to Step 5 by clicking **Next**. If not, click **Want to use a different address? Click here to add addresses to your profile**. Then click **Select Addresses for Profile** and search the directory using either the building name or street number.
3. Once you have selected the desired address, add your **Floor** and **Room** and click **Save**. This will ensure future order requests automatically default your preferred shipping address information. **Note:** you will retain the ability to change the shipping information as needed.



- Navigate back to the checkout screen by clicking the cart icon located in the top right menu and then click Checkout.
- The Required Delivery Date field allows you to indicate a suggested target date for goods or services to be delivered.

Shipping Options

Expected Delivery Date: mm/dd/yyyy

[Save Changes](#) [Close](#)

- Billing information is defaulted to the University's preferred Accounts Payable address.
- Navigate to the Chartfields section and click edit to enter chartfield values.

Chartfields

Business Unit: [Select](#) Fund: [Select](#) Department: [Select](#) Program: [Select](#) Project: [Select](#) Budget Year: [Select](#)

- Your chartfield values may contain Fund, Department, Program, Project and Budget Year. Upon submission of the requisition, the chartfield you have provided will be validated against FAME accounting information to ensure a valid chartfield string and availability of funds. If known, chartfield values can be entered directly into each field, however, clicking the **Select** button allows for the selection from a list of all NYU chartfield values. Once the values have been entered, click **Save and Next**.
- The **Notes** section is divided into two fields to allow you to include NYU specific notes to future reviewers (e.g. Department Approvers, Procurement, Accounts Payable) via the **Internal Notes** OR supplier specific notes as part of the PO document via **External Notes**. Click **Edit**, to add relevant notes to the applicable area and then **Save changes**. Proceed to the final step by clicking **Next**.

View My Shopping Cart [Shipping](#) [Billing](#) [Chartfields](#) [Notes](#) [Order Review](#) [Next >](#)

Looks good!
Proceed to [Order Review](#) to review and complete your order.

Internal Information [?](#)

Internal Note: [Edit](#)

External Information [?](#)

Note to all Suppliers: [Edit](#)

[Go To Advanced Checkout](#) [Next >](#)

- Order Review offers the user a final summary review prior to submitting the order for processing. If any of the previous validation steps have not been completed, the user will not be able to proceed. Otherwise, you can click **Place Order**.
- After clicking **Place Order**, you should be presented with a confirmation screen that summarizes your request and identifies your requisition number. You have the ability to observe the change order requests approval status among several other search options as noted below.

Requisition Submitted

Next Steps
You can view or print this at [Requisition 1508127](#), or via the [Document Search](#) page.

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	1508127 Quick view
Requisition status	Pending
Shopping Cart name	2016-02-08 mgleson 01
Requisition date	2/8/2016
Requisition total	750.00 USD
Number of line items	1

ASSIGNING A SHOPPING CART

1. The Shopper role does not possess the ability to “Place an order”. As a result, Shopper’s MUST assign shopping carts to a known department requestor. Not sure who your department’s requestor is? [Use the Requestor Look-up Tool.](#)
2. Assigning a cart can also be utilized to aggregate multiple items for different users, while still consolidating the request to one order.
3. Clicking the **Assign Shopping Cart** button during the checkout process allows the user to search the NYU directory for their Requestor, add them to their profile to expedite future efforts, and add a note to the assignee which will be delivered to their email via a system notification. Once the requisition has been approved, the Procurement team will review and process further.

Assign Shopping Cart

Selected Assignee: Requestors Requestors

Assign Shopping Cart To: [Search for an assignee](#)

Add to Profile

Note To Assignee:

Assign **Close**

4. To view the status of the requisition, use the Document Search or Quick Search feature to access the requisition and click on the **PR Approvals** tab.

Orders and Documents

Document Search | **Document Search**

Approvals | Search Documents

Requisition **PR Approvals** | Comments | Attachments | History

Submitted NYU Requestor 6/7/2016 2:51 PM	Purchase Req Validation 1 Completed ✓	Level 5 Bypassed	Level 4 Bypassed	Procurement Buyer Approval Approved ✓ Michael Gleason	Purchase Req Validation 2 Completed ✓	Create PO Completed ✓
--	--	---------------------	---------------------	---	--	--------------------------

ORDER FORM APPENDIX

BID WAIVER FORM (required fields)

1. Enter Supplier – field performs real-time search of entire NYU supplier directory (refer to the New Supplier Requests/Supplier Updates Tip Sheet for more information).
2. Commodity Code – select from a predetermined list of commodity codes.
3. Product Description – Maximum of (5) lines can be accommodated. 5 lines are not required to submit the Form.
4. (3) Bid Waiver questions – responses are required and will be evaluated by the Procurement team.
5. Description of goods/services being requested. If these goods/services are Sole Sourced, justification for sole source supplier and/or items is required.
6. Explanation of reason for bid waiver request is required.
7. Other options considered prior to determining needs for a bid waiver request are required.

CATERING FORM (required fields)

1. Enter Supplier – field performs real-time search of entire NYU supplier directory (refer to the New Supplier Requests/Supplier Updates Tip Sheet for more information).
2. Product Description – Enter the type of service to be performed by the supplier (e.g. Boxed lunches for student event)
3. Campus Department – Name of responsible department
4. Deposit Required – ‘Yes’ or ‘No’
5. Deposit Instructions – If ‘No’, enter n/a
6. Non Alcohol Menu, Alcohol Menu, and Other Services – These fields are optional and should be completed based on the event specifics. This form has been separated into three sections, as each line has a different accounting code need. NOTE: When the items are added to the cart, the user will be prompted to copy and paste the correct commodity code during the checkout process.

ORDER FORM APPENDIX

CHANGE ORDER FORM (required fields)

See Tip Sheet on Requesting a Change Order for more information.

STANDING ORDER FORM (required fields)

See Tip Sheet on Requesting a Standing Order for more information.

SUBAWARD FORM (required fields)

1. Enter Supplier - field performs real-time search of entire NYU supplier directory (refer to the New Supplier Requests/Supplier Updates Tip Sheet for more information).
2. Subaward Number - Number from subawardee invoice/letter
3. Internal Attachments - Subaward support documentation required
4. Description (Line 1) - Accommodates the first \$25,000 of each subaward agreement which is subject to the indirect cost rate (otherwise referred to as overhead or F&A)
5. Description (Line 2) - Accommodates the remaining balance of the subaward agreement which is not subject to the indirect cost rate.

Product Description

Under \$25K Item
The indirect cost rate (otherwise referred to as overhead or F&A) is applied only to the first \$25,000 of each subaward agreement.

Description	Catalog#	Unit Price	Quantity
<input type="text"/>	UNDER25	0.00	1

254 characters remaining [expand](#) | [clear](#)

Over \$25K Item
The remaining balance of the subaward agreement is not subject to the indirect cost rate.

Description	Catalog#	Unit Price	Quantity
<input type="text"/>	OVER25	0.00	1

254 characters remaining [expand](#) | [clear](#)

VENUE/EVENTS FORM (required fields)

1. Enter Supplier - field performs real-time search of entire supplier directory (refer to the New Supplier Requests/Supplier Updates Tip Sheet for more information).
2. Product Description - Enter the type of service to be performed by the supplier (e.g. Grand ballroom for Violet Ball)
3. Event Date
4. Event Time
5. Setup Location
6. Event Coordinator Contact Information - Non-NYU supplier contact
7. Deposit Required - 'Yes' or 'No'
8. Deposit Instructions - If 'No', enter n/a
9. Non Alcohol Menu and Alcohol Menu - These fields are optional and should be completed based on the event specifics. This form has been separated into three section, as each line has a different accounting code need. Note: When the items are added to the cart, the user will be prompted to copy and paste the correct commodity code as shown below

The screenshot shows a 'Product Description' form with a 'Venue/Events' link. Below the link, there are two sections: 'Non Alcohol' and 'Alcohol'. Each section has a 'Part Number' field with a dropdown menu and a 'Commodity Code' field. The 'Non Alcohol' section has a dropdown menu with the text '(Use commodity code 82150000)' and a 'Required field' error message. The 'Alcohol' section has a dropdown menu with the text '(Use commodity code 50202200)' and a 'Required field' error message. The 'Commodity Code' fields are highlighted with yellow boxes.

10. Internal Attachments - a quote from the supplier and/or other contract pricing information is required.