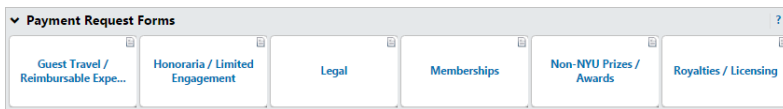


OVERVIEW OF PAYMENT REQUEST FORMS

- ▶ **Guest Travel/Reimbursable Expenses Form:** To be used to reimburse out of pocket expenses incurred by guests of NYU for Meals, Travel, Lodging, Taxi/Cab Fare, and Alcohol.
- ▶ **Honoraria/Limited Engagement Form:** To be used to accommodate engagements for speaker fees and honoraria, as well as, additional expenses including Meals, Travel, Lodging, Taxi/Cab far, and Alcohol.
- ▶ **Memberships Form:** To be used to pay approved NYU membership expenses only.
- ▶ **Non-NYU Prizes/Awards Form:** To be used to pay for prizes and awards presented to non-NYU individuals.
- ▶ **Royalties/Licensing Form:** To be used to pay for royalties and licensing fees due from NYU to an individual (including NYU employees).

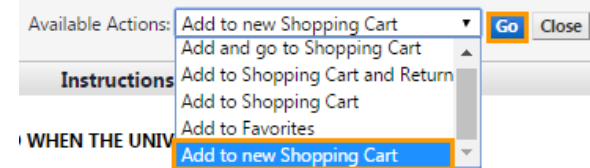
PREPARING A PAYMENT REQUEST FORM

1. Log in to i-Buy NYU via the Work tab of NYU Home using your Net ID and password.
2. Within the Payment Request Form 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. Alcohol on Guest Travel/Reimbursable Expenses Form).

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

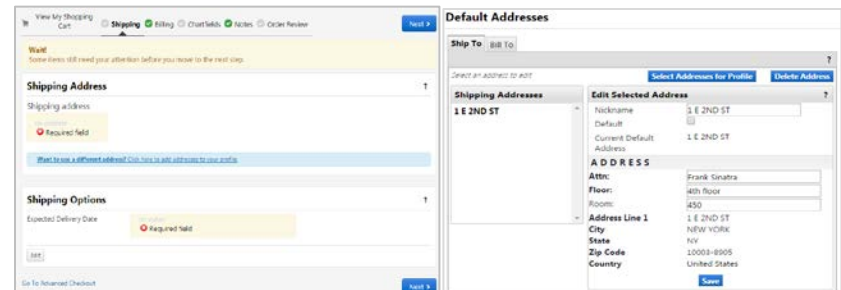


CHECKOUT PROCESS

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 request's 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.

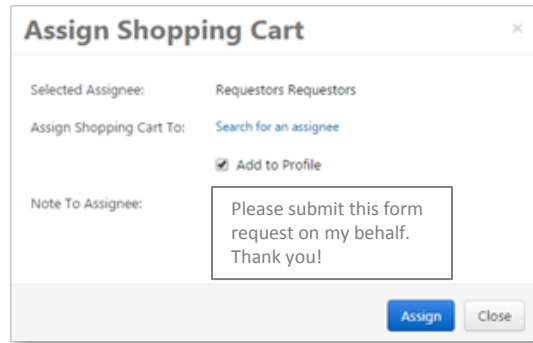
- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	1508127 Quick view
Requisition status	Pending
Shopping Cart name	2016-02-08 mglesson 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.



1. 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.

PAYMENT REQUEST FORM APPENDIX

GUEST TRAVEL/REIMBURSABLE EXPENSES FORM (required fields)

1. Enter Supplier - field performs real-time search of entire NYU supplier directory
2. Supplier Invoice # - A naming convention of GUEST plus date (e.g. GUEST12172015) is suggested.
3. Invoice Date - Date indicated on invoice.
4. Internal Attachments - Any necessary support documentation is required to submit the payment request.
5. Handling Code - Indicate whether requisition contains enclosures or if it is a regular payment.
6. Description of line items - Enter a price for each line item. Maximum of (5) lines can be accommodated. 5 lines are not required to submit the Form.

NOTE: During the checkout process, you will be required to copy and paste the commodity code provided at the checkout screen.

HONORARIA/LIMITED ENGAGEMENT (required fields)

1. Enter Supplier - field performs real-time search of entire NYU supplier directory
2. Supplier Invoice # - A naming convention of HONOR plus date (e.g. HONOR12172015) is suggested.
3. Invoice Date - Date indicated on invoice.
4. Internal Attachments - Any necessary support documentation is required to submit the payment request.
5. Handling Code - Indicate whether requisition contains enclosures or if it is a regular payment.
6. Description of line items - Enter a price for each line item. Maximum of (5) lines can be accommodated. 5 lines are not required to submit the Form.

NOTE: During the checkout process, you will be required to copy and paste the commodity code provided at the checkout screen.

PAYMENT REQUEST FORM APPENDIX

MEMBERSHIPS FORM (required fields)

1. Enter Supplier - field performs real-time search of entire NYU supplier directory
2. Supplier Invoice # - A naming convention of MEMB, last name, first initial and year (e.g. MEMB-BURKE,2016) is suggested.
3. Invoice Date - Date indicated on invoice.
4. Internal Attachments - Any necessary support documentation is required to submit the payment request.
5. Handling Code - Indicate whether requisition contains enclosures or if it is a regular payment.
6. Amount - Enter amount of membership.

NON-NYU PRIZES/AWARDS FORM (required fields)

1. Enter Supplier - field performs real-time search of entire NYU supplier directory
2. Supplier Invoice # - A naming convention of AWARD plus date of memo (e.g. AWARD120115) is suggested.
3. Invoice Date - Date indicated on invoice.
4. Internal Attachments - Any necessary support documentation is required to submit the payment request.
5. Handling Code - Indicate whether requisition contains enclosures or if it is a regular payment.
6. Amount - Enter amount of non-NYU prize/award.

ROYALTIES/LICENSING FORM (required fields)

1. Enter Supplier - field performs real-time search of NYU entire supplier directory
2. Supplier Invoice # - A naming convention of ROYALTY plus date of back-up (e.g. ROYALTY120115) is suggested.
3. Invoice Date - Date indicated on invoice.
4. Internal Attachments - Any necessary support documentation is required to submit the payment request.
5. Handling Code - Indicate whether requisition contains enclosures or if it is a regular payment.
6. Amount - Enter amount of membership.