THE NEW SUPPLIER REQUEST FORM

User Instructions

The New Supplier Request is processed, by using the Showcased Services within SciQuest and it now follows an independent workflow.

To request a supplier update or to add new suppliers to the SciQuest/Banner users submit a Supplier Request Form that will be forwarded directly to Purchasing Services.

Each required section of this form must be completed as requested, in order for the form to submit properly. Users have ample opportunity for a Final Review prior to submitting the form.

Any comments or questions regarding the requests are located either in user email notifications that are forwarded as the form flows thru the workflow process [provided the user has them turned on] and on the History Tab located within the form. This is how users receive notifications of Supplier Name as it will be found within the system.

Should users have any questions when processing this form or a supplier request please contact Purchasing Services at 285-1532.

Navigating the Form

Users have the ability to proceed/move thru the form in one of two ways: 1) Selecting the heading to the left hand side of the form; or 2) Selecting the buttons located at the bottom of each section; these options are interchangeable.

Form Headings, are located along the left hand side of the form are as follows: Instructions, Details, Questions, Requestors Information, New Supplier Request, Review and Submit, Form Approvals. Simply select the heading by clicking on it for each section, as you would like to complete them.

As sections are completed a green check mark will be located to the right of the section, the checkmark will remain gray for those areas not completed. If it is not completed correctly, the form will not allow you to proceed with the final request.

As users move thru the form they may periodically be asked to leave the page or stay when moving back and forth thru sections. Users should respond by indicating that they want to <leave page> and it will proceed to the next section.

Form Sections by Title Headings

Instructions

This section gives the basic overview of the form therefore please review the form instructions, prior to processing your form.

Please provide the information for this new supplier request in the given fields.

Bold fields are required. Please call 765-285-1532 with questions or issues with this form

*If your Supplier Request is **urgent** please contact Purchasing Services.*

Attach W9s, and other supporting documentation, listed in the "Supplier Information" Area of this form.

Additional Information:

Please make sure that you attach the appropriate information for your supplier below.

If you are requesting a BSU affiliate to be added OR selecting a Reimbursement/Refund, a W9 is not required.

If this is a company that is being added so you can purchase goods, please make sure you include how this supplier should receive their purchase order.

Details

This section simply gives the details of the form that has been selected. It is recommended that the user change the Form Name [Template Title], to reflect the form number and name of the supplier they are processing. This will list for the user the name of the individual they have submitted along with the form number so that it will be reflected in their search listing. To do this <Click> the Form Name field and change the document title name, to the form number listed on the left hand side along with the name of the Individual or Company, then select <Save> prior to proceeding.

Questions

This section consists of two sections the Requestors Information and the New Supplier Request. In each section, each field that has been required for the user to complete will have a STAR located to the right of the field title, simply <click> on the field below the title to complete the form. There will be a green check mark listed by each completed section.

Requestors Information

This section contains the contact information of the departmental user. It is the the only area where the department should place their department information in order for the form to be processed correctly. If the information is entered in fields outside of this area the request will not be processed.

Supplier Request

Form Number	1164088
Purpose	Generic Request
Status	Incomplete

Instructions

Details ✔

Questions ✔

  Requestors Information ✔

  New Supplier Request ✔

Review and Submit

Form Approvals

Questions - Requestors Information

⌄ **Instructions**

Please complete name, phone number, email and department name for who is requesting this supplier to be added.

⌄ **Requestors Information**

Requestor's Name: ★ ⃝

[   ]

Requestor's Phone Number: ★

[   ]

Requestor's Email: ★

[   ]

BSU Department Name: ★

New Supplier Request

This portion of the form must only contain information of the supplier that is to be processed. In this section the user must indicate what the form request is for, and indicate if the Supplier is an Individual or a Company, the questions will change based upon users response. If user does not respond then the form will not process and submit the form. In order for the remainder of the form to proceed with questions, it requires the user to respond.   When a W9 is required for the user to attach the option will appear to allow them to attach the document.

⌄ **Supplier Information**

Supplier Request is for: ★ 🔍 ⃝

○ Individual Reimbursement/Refund – (Non PO Payment for an individual A W9 IS NOT REQUIRED)
◉ Individual Stipends - (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
○ Company Reimbursement/Refund - (Non PO Payment a W9 IS NOT REQUIRED, RARELY USED)
○ Company Stipends – (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
○ Company Goods/Service – (A tangible product/service being requested - W9 IS REQUIRED)

Please upload the a [W-9]. To submit this request. 🔍

No File Attached
[Upload]

Please complete the supplier questions with the Supplier's contact information, and not that of the department, so that we can complete your request in a timely manner. Thank you! If you have additional questions please contact Purchasing Services 285-1532

⌄ **Individual Supplier Information**

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For a company Reimbursed/Refund, please provide an explanation for the reimbursement.

Supplier Request is for: ★ 🔍 ⓘ

○ Individual Reimbursement/Refund – (Non PO Payment for an individual A W9 IS NOT REQUIRED)
○ Individual Stipends - (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
◉ Company Reimbursement/Refund - (Non PO Payment a W9 IS NOT REQUIRED, RARELY USED)
○ Company Stipends – (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
○ Company Goods/Service – (A tangible product/service being requested - W9 IS REQUIRED)

Please complete the supplier questions with the Supplier's contact information, and not that of the department, so that we can complete your request in a timely manner. Thank you! If you have additional questions please contact Purchasing Services 285-1532

⌄ **Reimbursement for Company**

Please give explaination of why a reimbursement is needed for this company: ★ 🔍

2000 characters remaining

⌄ **Company Supplier Information**

Attachments

Attachments are located within the Questions area of the form under New Supplier Request form. When the W 9 is required, the option to attach the documentation will appear. If it is not required then the attachment option does not appear for the user.

This is the only area of the form from which the user will be able to attach documentation regarding this request. They have the ability to attach more than one document in this section but it must be done individually and save between the changes. The user has the ability remove these documents if needed. Simply select the <Edit> button to the right of the section and select Delete>. **If you have a W9 for your Supplier this is where you need to attach the .PDF format of the document.**

Instructions		⌄ **Supplier Information**
Details	✓	**Supplier Request is for:** ★ 🔍 ⓘ
Questions	✓	○ Individual Reimbursement/Refund – (Non PO Payment for an individual A W9 IS NOT REQUIRED)
Requestors Information	✓	◉ Individual Stipends - (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
New Supplier Request	✓	○ Company Reimbursement/Refund - (Non PO Payment a W9 IS NOT REQUIRED, RARELY USED)
Review and Submit		○ Company Stipends – (A form of salary, such as speaker, performer, consultant A W9 IS REQUIRED)
Form Approvals		○ Company Goods/Service – (A tangible product/service being requested - W9 IS REQUIRED)

Please upload the a [W-9]. To submit this request. 🔍

No File Attached
Upload

Review and Submit

Users must review the form prior to submitting, the system will not skip this section.

Once reviewed, the user is required to select the <Submit> button located to the bottom right of the screen and then select Confirm with a <yes> response for the form to be submitted. If user receives a form notification that requests changes in their

notifications, then they will need to resubmit the form utilizing this response section once they have made correction.

Once the form is submitted an assigned a number for the independent workflow the user can utilize it to search for the form, should they no longer see the notification.

Form Approvals workflow

The form is located in a separate workflow not a regular requisition workflow form and it will have its own set of approvals.

Once user has completed the processing of the form they can select the form by clicking on Form Approvals section and they have the ability to locate it under Form Request Actions notification that has been forwarded to them or thru their email notifications.

The Workflow Form notification is located at the Bell, listing for the user the stage of their requests as they are processed, and the user will receive an email notification.

However, automatic email notifications will only forward to the user if has been returned to them or once their item has been processed. To review items you can utilize the search document/form options within SciQuest.

Searching for the Cart/Form

To locate the form users can <click> on the notifications that have been forwarded in the email notification or they can utilize the search box and select **Form Requests** from the drop down menu at the top, in the document search section of SciQuest. Select form type as New Supplier Request and can enter the name of the supplier in Form Name.

How to review Comments on Returned Requests

The search listing that is provided to the user will give them a way to review their items and how they have been completed and to review if there have been any notes placed on their requests once they have been processed. To access the form <Click> on the form name, beside the form number to select the form to make the appropriate changes or view the responses/comments, on the **history tab**.
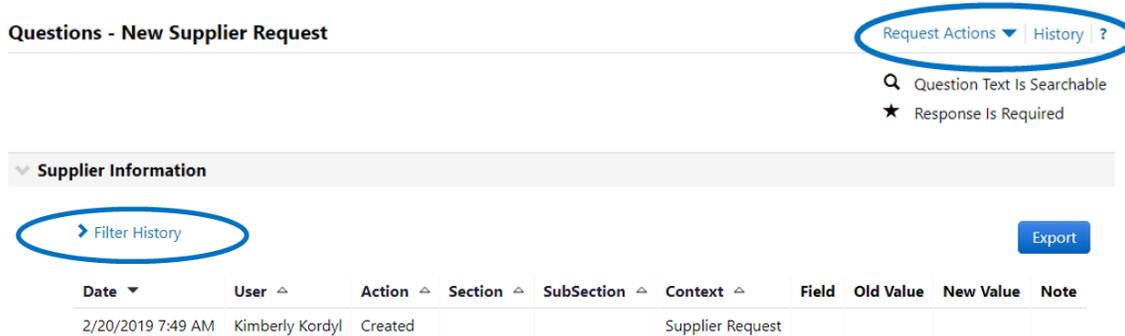
Returned Carts & The History Tab

For returned carts/requests, the user can navigate the form as before to enter the necessary corrections, such as an initial or name correction. Then Select **<Save>** as they proceed thru their corrections.

To review why a cart has been returned to the user they can review the notes regarding the cart by Selecting the **<History Tab>** located in the top right of the form, as listed above.

If changes have been made to the request by users they must select **<Save>** as they proceed thru the tabs for those changes to be made to the request, then select **<Submit>** Request for that request to be processed.