

## 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.

The image shows two parts of the form interface. On the left is a vertical sidebar titled 'Instructions' with a list of sections: 'Details' (with a green checkmark), 'Attachments' (with a green checkmark), 'Questions' (with a gray checkmark), 'Requestors Information' (with a gray checkmark), 'New Supplier Request' (with a gray checkmark), 'Review and Submit', and 'Form Approvals'. On the right is a form header area titled 'Form Type' and 'New Supplier Request'. Below the header, there is a '★ Required' label, a '← Previous' button, a 'Save Progress' button, and a 'Next >' button.

Form Headings, are located along the left hand side of the form are as follows: Instructions, Details, Attachments, 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, in the "Attachments Section" listed in the NEXT SECTION 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 to pay for reimbursement 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.

The image shows two screenshots of a web form titled "New Supplier Request". The top screenshot shows the "Details" section with the following fields:

Form Number	17254
Purpose	<b>Generic Request</b>
Status	<b>Incomplete</b>
Instructions	

Details section:

Form Name *	New Supplier Request
Purpose	Generic Request
Template Title	New Supplier Request

The "Form Name" field is highlighted with a blue box, and a blue arrow points from it to a second screenshot below. In the second screenshot, the "Form Name" field contains the text "17254 John A Doe".

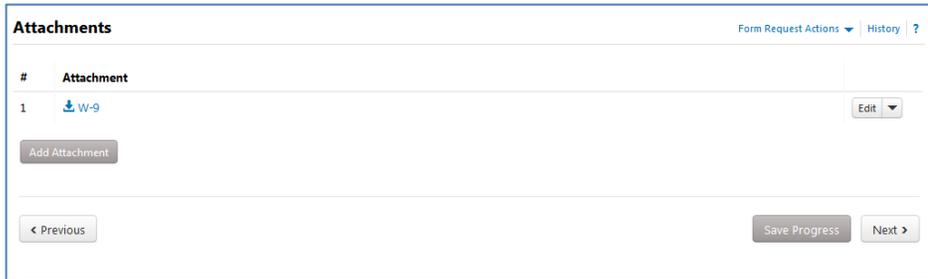
Form Number	17254
Purpose	<b>Generic Request</b>
Status	<b>Incomplete</b>
Instructions	

Details section:

Form Name *	17254 John A Doe
Purpose	Generic Request
Template Title	New Supplier Request

## Attachments

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.**



#	Attachment	
1	<a href="#">W-9</a>	Edit

[Add Attachment](#)

[< Previous](#) [Save Progress](#) [Next >](#)

## 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 section that has been completed.

### 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.

### 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.

Are you updating or adding a Supplier that is an Individual? ★ ?

Yes  No

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

## **Returned Carts & The History Tab**

Should a cart be returned to a user, they can simply navigate the form as before only 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.



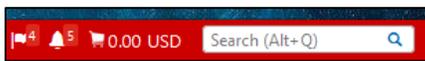
If changes have been made to the request by users they must select <Save> as they proceed thru the tabs for those changes to be made to the request, then select <Submit> Request for that request to be processed.

## **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.

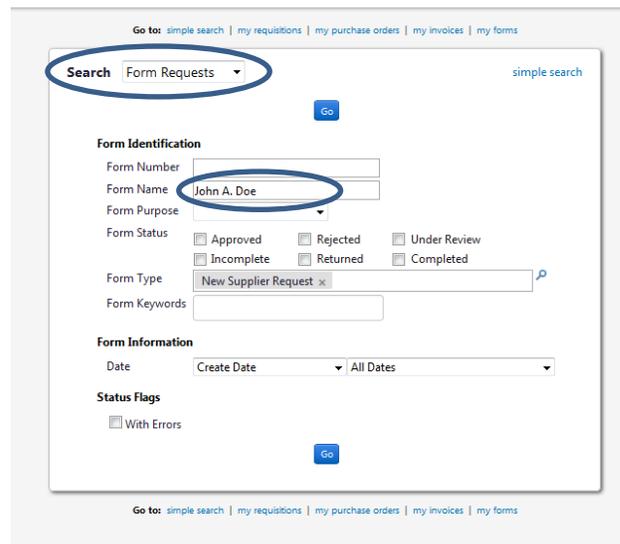
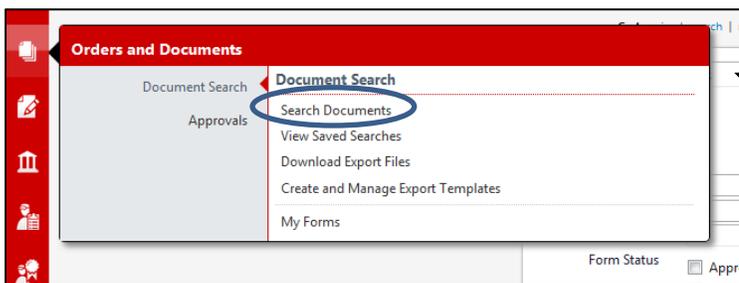
The Workflow Form notification can be found at the Bell and will list for the user the stage of their request as it is being processed, and they will also receive an email notification.



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.



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 that have been left on the **history tab**.

Form Name	Form Number	Form Purpose	Form Status	Form Type
<a href="#">New Supplier Request</a>	16367	Generic Request	Incomplete	New Supplier Request