**BROWSER COMPATABILITY**

RealSource has no known web-browser compatibility issues. However, if you do experience web-browser issues, please try to first access the tool using another web browser. Also, disable any pop-up blockers currently installed on your preferred web browser.

**PARADIGM SHIFTS**

RealSource, which runs on a JAGGAER platform, is used successfully by other higher education institutions across the U.S., including Virginia Tech and The University of Virginia, and includes the entire source-2-pay cycle. These are the major new and exciting changes for VCU.

**TODAY VS. TOMORROW**

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<th>Today</th>
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<tr>
<td><strong>VENDORS</strong></td>
<td>VCU On-Boards vendors in Banner</td>
<td>Vendors On-Board themselves in Jaggae</td>
</tr>
<tr>
<td><strong>SOURCING</strong></td>
<td>No software system currently exists</td>
<td>RFQs/BVAs/RFPs, vendor responses and committee evaluations submitted and shared electronically in Jaggae</td>
</tr>
<tr>
<td><strong>PURCHASING</strong></td>
<td>P.O.s issued with limited info, approval workflows are limited, bad reporting</td>
<td>Depts will shop e-catalogs. Simple prompts will allow VCU to collect data, workflows are more flexible, and data reports will be available</td>
</tr>
<tr>
<td><strong>RECEIVING</strong></td>
<td>Dept drive through 9 Banner screens to “receive” a single line item</td>
<td>Receiving in Jaggae requires a single click</td>
</tr>
<tr>
<td><strong>CONTRACTS</strong></td>
<td>Dept searches several websites to find contracts</td>
<td>Query the Jaggae contracts system to find contracts. Contracts in full text will be authored, electronically executed and stored in Jaggae</td>
</tr>
<tr>
<td><strong>INVOICES</strong></td>
<td>Dept collects invoice &amp; sends to central for processing. Lots of manual processes win PS</td>
<td>Vendor uploads invoices via a portal, flips P.O.s to generate an invoice or submits multiple invoices in a data file. Depts have visibility into invoices and can also “bill” departments in Jaggae (vs. JV’s)</td>
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**TABLE OF CONTENTS**

Please use this Table of Contents to navigate through the RealSource Help-Guide. If you only need help with a specific step, please select the topic below.

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GLOSSARY

Cart
A cart holds details about the items(s) or services that you would like to order. Carts are draft entries; they don't become actual orders until they are submitted. Once the cart has been submitted, it becomes a Purchase Requisition (PR).

Purchase Requisition (PR)
Requisitions are referred to as Purchase Requisitions or PR’s. PR’s in RealSource have an approval process (or workflow) that requires that the PR be reviewed / approved. Once a Purchase Requisition is fully approved and complete, it becomes a Purchase Order.

Purchase Order (PO)
A Purchase Order is a binding contract to purchase goods or services. PO’s are distributed to Suppliers in RealSource via cXML (electronically), fax or email.

Invoice
Invoices in RealSource are based on PO purchases. Invoices are subject to tolerance requirements related to the PO and Receipt. Once an Invoice is fully approved and complete, it will be marked as “Ok to Pay” and exported to BANNER for payment.

Non-Catalog Items
A non-catalog order indicates the item is not available via a Hosted catalog or Punch-out catalog. RealSource has no pricing for the item being requested and it is the User’s responsibility to accurately describe and price the item.

Punch-out
From RealSource, you can click on “links” (the Supplier logo) to go to a Supplier’s site to shop. This experience is very similar to shopping directly from a Supplier’s website except that the vendor typically tailors the external catalog to items/prices specific to VCU. After shopping from a vendor punch-out, the items are returned to the RealSource cart.

Forms
In RealSource a form is merely an “electronic” version of a paper form, which can be filled out, added to a Cart and submitted. It can have fields that are required and can also have attachments.

Shopper
Shoppers do not need Banner Finance access; can access shopping items and assign them to Requester.

Requester
Requesters must have Banner Finance access; can access Shopping Items, add them to their Cart and submit or assign their Carts for approval.

Approver
Approvers will approve Purchase Requisitions based on specific criteria that has been determined for routing the Requisition.
ROLES

Three basic roles exist in RealSource; Shoppers, Requesters and Approvers. Roles have been selected by the department and adhere to VCU requirements. The goal of different user roles is to help each department perform tasks in an efficient and simple manner at VCU.

Any user with a VCU eID can “shop.” All Shoppers have access to place items in a cart, similar to engaging in an online shopping experience. Shoppers will create a cart of needs, then assign the cart to a Requester.

**Shoppers can:**
- Create a shopping cart
- Receive an order
- Request a contract
- Request a vendor
- Use 25+ Punch-Out catalogs for shopping
- Use request forms (non-catalog item shopping)

**Shoppers cannot:**
- Submit Orders

All requesters must have Banner Finance access. Requesters enter accounting information and ensure the information entered by the Shopper is valid, if the cart was assigned to them. A Requester will then submit the order for approval and must make sure the “Prepared By” fields are.

**Requesters can:**
- Create a shopping cart
- Submit a shopping cart
- Receive an order
- Request a contract
- Request a vendor

**Requesters cannot:**
- Approve orders

Approvers have limited tasks in RealSource, but are critical in processing an order. Department Approvers review all orders for appropriateness and approve accounting.


**Approvers can:**
- Create a shopping cart
- Approve an order
- Request a contract
- Request a vendor

**Approvers cannot:**
- Receive an order

A workflow diagram showing user roles as they are involved in procuring goods/services at VCU is shown below:

![Workflow Diagram](image-url)
**RealSource OVERVIEW**

Below you can find a quick view of your RealSource Dashboard. To access the RealSource portal, log into the myVCU portal or visit the RealSource website. You will then access the system via SSO.

Once you have logged into the RealSource Portal the *Shopping Dashboard* will display each time (below).

1: This portion of the Dashboard makes finding work you completed in the past or work pending completion in RealSource quick and easy.

- **Test Requester**
  - This is where the User Name is shown. Above, “Test Requester” is shown as the system user’s name.

- Star icon
  - The *star* icon is a quick way to access any Bookmarks. Bookmarks are helpful when you frequently visit one particular portion of the portal.

- Flag icon
  - The *flag* icon includes any action item you must complete.
The **bell** includes the number of notifications you have in the system.

The **cart** includes the total dollar amount of the items placed in your cart.

The **search bar** is used to locate PR’s and PO’s by the number.

**2:** This portion of the Dashboard includes shortcuts to search for documents you will need. This will look different depending on the user’s roles and access in the tool.

![Dashboard icons](image)

The **Home** icon will always send users to the main Shopping Dashboard.

The **Shop** icon mimics the Home page. The Shopping Dashboard appears when selecting the shop icon. From here, users can choose to shop from eCatalogs, and forms.

The **Orders** icon allows users to search for documents.
The **Accounts Payable** icon allows users capability to search for invoices, receipts, credit memos and access the One Time Payment form.

The **Vendors** icon contains the Department Vendor Request Form. To learn more about the Vendor Request form visit the section titled “How Do I Request a New Vendor?”. You may also search for vendors already listed in RealSource for VCU use by selecting this icon.

The **Sourcing** icon allows users to access the Sourcing Form request.

The **Reporting** icon allows Requesters to search and export raw data.

**3:** On the home page, users can view the Organization Message. Here, VCU contact information is displayed like the RealSource website and HelpDesk information. The “User Alert” is updated with a message for our RealSource users.
4: On the home page, you can select your most used resources like, non-catalog items, carts (draft, assigned, and shared), and forms (used by your department).

5: On the RealSource Dashboard, eCatalogs are accessible under the “Showcases” section of the system. You can use these punch-out catalogs to shop for departmental needs. Forms are also in the “Showcases” area of the portal. Forms are displayed based on user roles. The screen below mimics that of a Requester.
CUSTOMIZING YOUR PROFILE

As a RealSource user your role is important and you are able to customize your profile based on information you frequently use and tasks you perform daily. The two main definitions used in customizing your profile are Defaults and Favorites. Only one default is used to populate an order. You can set as many favorites as you’d like. Favorites are available by selecting the search icons when interacting within the system.

To customize your RealSource profile, follow the steps below. These series of steps apply to Shoppers, Requesters, and Approvers. The screens below, replicate a Requesters role in the system.

At the top right corner of the Shopping Dashboard select the icon (your name). A drop down mirror will appear. Select the icon.

After selecting the icon, you will be redirected to the screen below. From here you can customize your RealSource profile.

1. User Profile and Preferences

1a. User’s Name, Phone Number, Email, etc.

- From here you can enter your phone number(s). You may notice some preferences are pre-populated like Department, and the Authentication Method.

After entering the appropriate information in each field, select the icon.
2. Custom Field and Accounting Code Defaults

2a. Custom Field and Accounting Code Defaults

- RealSource allows users to set their account/index code defaults.

- To add your index/account codes select the **Edit** icon.

After selecting the **Edit** icon, select the **Create New Value** icon. A pop-up window will appear.

- Select the search icon then check (✓) the “select value box.”
• After the Index code is checked, select the **Add Values** icon.

2b. Default Addresses

In RealSource, you can customize your Default *Ship to Address*. This will save your default ship to address for each order you may assign or submit.

• To begin select the **Select Addresses for Profile** icon.

After selecting the **Select Addresses for Profile** icon, another window will show demonstrated below.
• You can add an address by entering text in the Nickname / Address field or select the Search icon.
Select the appropriate *Ship to Address* for your RealSource profile.

- Select the "bubble" with the correct address.

After choosing the correct address, the web-page will automatically mimic the below image.
• Remember to complete the ATTN:* custom field as it is required (*). You should add your name here.

• Select the icon.

After you have chosen a Ship to Address, select the icon. You can add multiple Ship to Addresses in the system.

RealSource only allows users to choose from one Bill to Address. This address is already pre-populated in the system and no changes can be made.

• To save and add the Bill to Address to your profile, select the icon.

After selecting the icon, you can begin adding Cart Assignees.

3. Cart Assignees

Since Shoppers can only create carts and not submit them, defaulting your cart to a certain user may seem necessary. Users in any role can assign their cart.
To begin adding Cart Assignees, select the Add Assignee icon.

After selecting the Add Assignee icon, a pop-up menu will appear.

Complete Last Name and First Name, then select the Search icon. A list of RealSource users will appear.

Select the name of the user you’d like to quickly assign carts to when shopping.
After selecting the user’s name, you will be redirected to the original web-page for Cart Assignees.

After selecting the icon, proceed to Checkout Settings.

4. Notification Preferences

In RealSource, users can choose to be notified of certain functions and/or work that must be completed in the system. Choosing to be notified within the system and/or via email is customizable and based on user preference.

To begin, select the icon. Your screen should mimic the web-page below (Requester view).
• Next, select the edit icon.

• Select the bubble with the appropriate term (Default or Override), then select the save changes icon.

• Repeat the process above for each of the steps within STEP 3: NOTIFICATION PREFERENCES.

After choosing which topics to be notified of, when you are alerted you can find notifications by selecting the icon located in the top right corner of the Home/Shopping Dashboard. Remember, the icon represent action items not notifications.
HOW DO I REQUEST A NEW VENDOR?

RealSource users can quickly request to add a new vendor within the system. Shoppers, Requesters and Approvers can all request to add a new vendor. There are two vendor request forms (1. Company, 2. Individuals).

**Vendor Searches in RealSource**

To determine if the vendor is already in the Total Supplier Manager Network (TSM), you can:

Search within the RealSource system using the RealSource toolbar, or by selecting the icon on the left side of the Shopping Dashboard.

If the vendor is not yet available for use within the RealSource system, select the icon.
Hover over Requests and select the icon.

A pop-up window will appear, provide the following information. There are two Vendor Request Forms to choose from: Individual and Company. This Quick Guide will help you request a new vendor and individual.

- After entering the Vendor Name, the system will notify you if a possible duplicate vendor has been entered. The error message shown below will appear. Select the link to determine whether or not the Vendor is already registered in RealSource.

- Select the Submit icon.
After selecting the **Submit** icon, you will be redirected to the Instructions web-page.

**Request Form**

Company Vendor Requests are for any company doing business with VCU. After the Vendor Request Form is completed, Procurement Services will invite the requested vendor into the system and the vendor will be responsible for registering their company/self as a vendor. Departments are responsible for ensuring all vendors are eVA registered. All vendors providing goods or services to VCU are required to register through eVA. Confirm the vendor is self-registered in eVA at [www.eva.virginia.gov](http://www.eva.virginia.gov) under the Transparency: eVA Vendor list tab.

To begin completing the form, select the **Next** icon. You will be redirected to the *Questions- Company Overview* section of the form.
Complete the form in its entirety. All of the required fields have an asterisk (*). The Individual Request form has fewer fields to enter. For a Company Vendor Request Form the following questions will appear:

- Vendor Name(*)
- Tax ID Number(*)
  - If this is a foreign vendor enter nine digits using the number 9 (i.e. 999999999)
- Vendor Contact Name First & Last Name (*)
  - Only for Company Request
- Vendor Contact Email Address (*)
  - This is the most important piece of information in the Vendor Request Form. VCU must have a valid email address for the vendor. Please ensure the email address is correct as the email for registering as an active vendor in RealSource will be sent to the provided address.
- Vendor Phone Number(*)
  - Enter digits only, no – or /
- Vendor Street Address- lines 1 & 2 if necessary (*)
- City(*)
- State(*)
  - Be sure to enter the two-letter state code (i.e. Virginia is VA)
- Zip Code(*)
  - If use of a foreign vendor is being requested, enter five digits using the number 0 (i.e. 00000)
- Country(*)
- W-9 / W-8 upload
  - In some cases, you may have previously gathered a copy of the vendor’s signed W-9 or W-8 form. If so, upload the form. If not, Vendor Support (Procurement Services) will collect the vendor’s specific tax information upon submitting your Vendor Request Form.
For an *Individual Request Form*, the same fields as the previous section will appear. Two different questions are required to invite the vendor into the system.

- Is this for a Chrome River reimbursement only?
- Is this request for an Independent Contractor?

After completing the form, select the [Next] icon.

Below is the *Review and Complete* web-page.

Proof the *Questions* portion of the form and check (√) the Certification box. Remember, **you are certifying that the information you have provided in this request is accurate to the best of your knowledge.**

![Review and Complete page](image)

After certifying the provided information is indeed accurate for the vendor, select the [Complete Request] icon.
You will then be redirected to the My Vendor Requests web-page. From here, you can view the vendors/individuals you have requested to date. It will also tell you the vendor’s registration status.

From here, you can see that Ram Testers is currently under review by the Vendor Support Team. When the vendor is approved by Vendor Support and active in the system, you will be notified. It is then the vendor’s responsibility to register in RealSource. Remember, any VCU vendor must first be registered in eVA.

**Status of Vendor Requests**

To see the status of your Vendor Request Form, hover over the icon on the left side of the Shopping Dashboard.

Select Requests, then choose *My Vendor Requests.*
You can filter through the *My Vendor Requests* web-page.
HOW DO I SHOP?

RealSource supports three main ways to shop by using; Punch-Out Catalogs, Non-Catalog Items, and Forms.

Punch-Out Catalogs

Punch-Out Catalogs are presented on the vendor’s website and provide access to our preferred vendors. Pricing for Punch-Out Catalogs is based on VCU contract pricing. You can find a list of the eCatalogs VCU has contracted for on the Shopping Dashboard.

- To begin placing a Punch-Out Catalog order, select the vendor’s tile. This will take you from RealSource to the chosen vendor’s website to place the order. Each vendor’s site responds differently.
After selecting the Supply Room Companies Punch-Out catalog, you will enter their website.

- To begin placing your order, you can enter the name of the needed item in the search bar the press enter or hover over the icon.

- To order one box of pens, enter “pens” in the search bar, you can scroll below to choose the type. You can also sort by on the items found.
After adding Item 1 to the shopping cart, you can select the View Cart icon.
After select the **View Cart** icon, you will be redirected the Shopping Cart. From here you can see all of the current items in your cart with The Supply Room.

- If you are finished with shopping select the **Submit Cart**. If you would like to add to the order, select the **Continue Shopping** icon and repeat the process above.

After selecting the **Submit Cart** icon, you will return to your RealSource shopping cart.
• If you have completed your order, **Requesters** can select the **Proceed to Checkout** icon.

• Shoppers must choose the **Assign Cart** icon.

By selecting the **Proceed to Checkout** icon, **Requesters** will proceed to the next-step in placing a Punch-Out catalog order.
- If you did not set your User Profile defaults, you will receive an error message. Return to the Requisition navigation to ensure each field has been completed.

![Requisition Diagram]

After returning to the Requisition Navigation, you will notice a series of “check marks.” If you have a green check mark, you have completed the requisition. If the check mark is lightened, you will need to complete the requisition before placing the order.
• If you have any grey check marks or missing information, you can select the icon, and enter any missing information.
• If you only have **green** check marks in your shopping cart, you may view the PR Approval process.

To view the PR Approval process, select the **PR Approvals** icon.
• This order will be sent to Banner to ensure the accounting information is active, then sent directly to the Department Approver(s) to approve. The order will be sent to Banner after all approvals are complete, and the PO is created.

• To complete the order select the **Place Order** icon.

After selecting the **Place Order** icon, you will receive your next steps for the Purchase Requisition. The order has now been submitted and is pending approval.
Once your requisition has been approved, you will be alerted of order approval and you can check the status of an order, by returning to the icon on the left side of each web-page. You can enter in the PR number or Search for all Requisitions. Once the order has been approved and integrated with Banner, your PR number will generate into a Purchase Order (PO) number.

**Non-Catalog Item Shopping**

To place a Non-Catalog Item order, return to the *Shopping Dashboard: Quick Links* section.
- Select the Non-Catalog Item link.

After selecting the *Non-Catalog Item* link, a new window will appear.

- Enter the Vendor Name or Request a new vendor if it is not in the system
- Enter the Product Description
- Enter the Quantity (number of needed goods/services)
- Enter the Packaging (Unit of Measure)
- Select the *Save and Close* icon.

After selecting the *Save and Close* icon, then proceed to your shopping cart. The shopping cart is always in the top right corner of each web-page next to the User’s name.
If you are ready to submit the order select the icon.

Since this user does not have their Address and Account codes defaulted in the system, there is an error message. The user also did not enter a commodity code. To submit or assign the cart, you **must** have each required field completed.

To edit/ add the Shipping Address, select the icon.
Enter the following information. If you have customized your profile, you will be able to select the appropriate Ship to Address from the list saved in your RealSource profile.

Select the icon once the entire Shipping form section is complete.

To begin adding Accounting Codes, select the icon.

Enter the appropriate Index code and Account Code.

You can also split accounting at the PR header and PR line level.

To split the accounting at the PR header level, select the icon and begin adding the split.
• After splitting the accounting, select the **Save** icon.

After selecting the **Save** icon, you will return to the main web-page. The last step to assigning this order to a Requester is to add the commodity code.

VCU Commodity Codes are used to determine what goods or services are being bought by the university. The Commodity Codes in RealSource use key words like Equipment (EQUIP), Services (SVCS), and Supplies (SUP) to help users choose the appropriate code for each PR.

To begin adding the Commodity Code, select the **Final Review** link to the left of the web-page and scroll to the bottom of the webpage.
- Select the icon

- Select the magnifying glass (🔍) icon to search

- If you know the Commodity Code you will be using for this order, you can enter it in the “blank” field. You may also enter a small description to help with your search results. If not leave both fields empty, and select the icon.

After selecting the icon, choose the appropriate Commodity Code to identify your PR.
• Select the appropriate Commodity Code and continue reviewing the shopping cart you have created.

After selecting the Commodity Code, you are redirected to the Requisition details webpage.

• You may also include any Internal Notes (department only use) or External Notes (vendor use) to use for history or communication purposes. To add attachments, you can select the icon. Attachments can be added to any type of order.

Return to the top of the web-page and select the icon once you have reviewed the cart. The order is now complete.

To assign a cart, select the icon at the toolbar on the top of each web-page next to the user name.
• Select the [View Cart] icon.

After selecting the [View Cart] icon, the shopping cart will appear.

• Select the [Proceed to Checkout] icon, and a pop-up window will appear to add a Cart Assignee.

After selecting the [Proceed to Checkout] icon, complete the following form and add the appropriate Requester / Approver so the order can be placed.

• If necessary, you can also add a note for the Assignee to see when they are notified a cart has been Prepared For them.

After selecting the [Assign] cart icon you will receive the Cart Assigned Successful Submission web-page.
Receiving a **Non-Catalog Item** order is easy and efficient. To receive an order, select the `Orders` icon on the toolbar.

**Form Shopping**

Many purchases in RealSource require use of a Form. RealSource has several forms located on the Shopping Dashboard.

There are multiple Forms in RealSource. Since each user has a different role and department, not all RealSource users will have access to every form within the system and some users/departments may see additional forms. Descriptions of each Form/Form request are below:
• **After-the-Fact Purchase**
  
  o This form should be used when a department has obtained goods or services in a non-emergency situation prior to the issuance of a PO. This POs are **not** sent to the vendor to avoid duplicates.

• **Cancel PO Request**
  
  o This is the standard form for cancelling all Purchase Orders.

• **Declining Balance PO**
  
  o The Declining Balance PO should be used when products or services are ordered on a term contract, a VASCUPP contract, and other cooperative contract or similar, over a defined period of time and there is not a regular payment schedule. The total amount entered on the Declining Balance Purchase Order should include all anticipated charges (vendor travel expenses, shipping and freight, other ancillary charges).

  o Requesters must also receive these items using a *Cost Receipt*.

• **Independent Contractor Agreement (ICA)**
  
  o When doing business with an Independent Contractor, departments must still complete the *signed ICA form* on the [RealSource website](#). However, the ICA form in RealSource must also be completed. The ICA form is for entities or individuals who have entered a contractual agreement with VCU: to provide goods or services and are not employed by VCU, have no expectation of becoming an employee at the end of the contractual service, relies on expertise rather than following department instructions, performs work under the specification of, but not under the direction of a VCU employee or student, did not have the required number of work hours/days set by VCU.

• **Emergency Procurement (over 10k)**
  
  o This form is similar to the After-the-Fact purchase form, but should only be used for emergency purchases greater than $10,000.
• **IT Purchase Form (over 10k)**
  
  - This form is used for IT hardware, software, and/or IT service purchase agreements.

Shopping with a Purchase Form is quick and efficient and resembles shopping with a Punch-Out Catalog and Non-Catalog item once the item has been added to the Shopping Cart. Most Procurement Services Forms have been created in the RealSource system and do not require the submission of a paper form or signature. All Forms/Form Requests follow the same workflow processes.

To begin shopping with an *After-the-Fact Form*, return to the Shopping Dashboard and select the appropriate tile as seen below.

- Select the After-the-Fact Purchase tile, a pop-up window will appear.
This is the After-the-Fact (ATF) Purchase Form, complete the entire form.

- Add all line items with the desired quantity and the vendor’s unit price. Remember, the Unit of Measure for the Quantity field is one per unit price (i.e. 589 * 4 = $2,356 in this example).

After completing the form, add a reasonable explanation detailing why the goods were being ordered.

- You may also add any attachments to help explain the purchase.
- Scroll to the top of the pop-up window and choose the appropriate Available Action (i.e. Add to Cart, Add and Go To Cart, etc.)

- Then select the Go icon.

After selecting the Go icon, you will be redirected to “Available Action” you chose when completing the ATF Form.

- The total price of all lines has been calculated and any incomplete fields will have to be filled before checking out or assigning the cart.

- After reviewing your Shopping Cart, select the Proceed to Checkout icon or the Assign Cart icon if you are a Shopper.

After selecting the Proceed to Checkout icon, you are redirected to the Draft Requisition web-page.
• Just like Catalog and Non-Catalog Item orders, you can split accounting at the PR header and PR line level.

• To split accounting at the line level, select the edit icon on the line you wish to edit.

After selecting the edit icon, add the appropriate index/account code(s). The web-page will mirror the below image.
If all information looks correct, select the icon.

After selecting the , you will receive the Successful Requisition Submission and the PR number message.

To begin shopping using the **Declining Balance PO Form**, return to the Shopping Dashboard and select the appropriate tile, as shown below.

- Select the **Declining Balance PO Form** Request tile, a pop-up window will appear.

This is the Declining Balance PO Form Request, complete the entire form.
• Carefully proof the instructions, then select the **Next** icon.

After selecting the **Next** icon, you will be redirected to the Details web-page.

• Complete each field. The Form Name is the only required field and can be changed to a unique name (optional). If you do not need to change the Form Name field it is already pre-populated with “Declining Balance PO.”

• Select the **Next** icon and proceed to the Vendors portion of the Form Request.

After selecting the **Next** icon, you will be redirected to the Vendors portion of the Form Request.
This area can be completed by entering the registered vendor or by selecting the Search icon.

If the information for the vendor is keyed you must select the Next icon to move to the Attachments portion of the Form Request. If not, after selecting the vendor’s information from the search results you will be automatically redirected to the next portion of the Declining Balance PO Form Request.

After selecting the Next icon, you will be redirected to the Attachments area.
• Here, you may find it helpful to upload an attachment such as the Contract or any other important historical information. Do this by selecting the **Add Attachment** icon.

• Select the **Next >** icon, to proceed to the Form Fields section.

After selecting the **Next >** icon, the Form Fields web-page must be completed.

• Enter the following fields
  
  - Purpose (*)
  - Purchase Amount
  - Any special handling instructions

• Select the **Next >** icon, this is the final step of the Form Request before adding the item(s) to your Shopping Cart

After selecting the **Next >** icon, you can review the Form Request. You may add the order to your Favorites also.
Select the to submit or assign the cart and complete the PR in its entirety.

The Accounts Payable: One Time Payment/Check Request Form. These Non-Purchase Order transactions called "Direct Pays" are processed in the system, still require the department approval; but will not create a Purchase Order. These transactions will be processed by the Account Payables Team and do not require a receiving report to be completed. To see a full list of activities purchased using this form visit the website.

To begin shopping using the One Time Payment/Check Request Form, return to the Shopping Dashboard and select the appropriate tile, as shown below.

Select the One Time Payment/ Check Request tile, a pop-up window will appear.

Complete the entire form and complete the New Vendor Request Form (if needed).
- Complete all required fields and select the Available Actions, then select the icon.

- After selecting the icon, return to the Shopping Cart and submit or assign the cart.
HOW DO I INITIATE A CHANGE REQUEST?

To begin creating a change request, select the icon. To view a specific order enter the PO Number. Use the search engine to view all orders. Filter the documents as necessary.

Once locating the correct PO to issue a change order for, a pop-up window will appear.

- Select the “Document Actions” menu in the top right corner of the PO, then select the link.
A pop-up window will appear asking you to alert users of the Change Request.

- You can add email notifications, and a message for certain users (optional)
- Upload any attachments (optional)
- If you do not need to alert other users, select the icon.
After selecting the **Create Change Request** icon, you will be redirected to the Change Request Summary web-page, scroll to the bottom of the Change Request to edit the line items.

- To make changes to the Line Items select the **edit** icon.

- After making changes, select the **Save** icon.

- Note that Punch-Out Catalog orders *cannot* be edited.

After selecting the **Save** icon, you can add a new line or change the index/account codes (if applicable). You cannot add a line item to a Punch-Out Catalog order.
To add a line item, select the link at the bottom of the Change Request web-page.

After selecting the link, a pop-up window will appear.

Enter all of the fields

- Enter the product description
- Catalog No.
- Quantity
- Price Estimate
- Packaging (Unit of Measure)

- Select the **Save and Close** icon, if the Change Request is complete select the **Submit Request** or the **Assign Draft** icon.

- To change the account/index codes for this Change Request, return to the Lines area of the Change Request.

To make changes to the account/index codes it must be done at the line level, not PO header. Changing account/index codes at the PO header level will cause the Change Request to fail integration with Banner.

To change the index/account codes, “zero out” the existing item(s), and then add replacement items with the new index of account codes.
• Select the edit icon and begin entering the new information. Select the Save icon after completing each field.

• Zero out existing item(s), edit the needed line items and change their price to zero dollars ($0.00).

• Add replacement line item(s) for each item you have zeroed out.

• Add new accounting information to each new line item. Select the Accounting Codes from the Change Request navigation menu.

After selecting the Accounting Codes link, begin changing the line items accounting codes.

<table>
<thead>
<tr>
<th>821 Cafe</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Services</td>
<td></td>
<td></td>
<td></td>
<td>1.000.00</td>
<td>1.000.00 USD</td>
</tr>
</tbody>
</table>

**Accounting Codes**
**Values have been overridden for this line**

<table>
<thead>
<tr>
<th>Chart</th>
<th>Index</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>V</td>
<td>121101</td>
<td>620029</td>
</tr>
<tr>
<td>V</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Copy to other lines |

| 2 Services          |            |          | 5.00      | 178 Each | 855.00 USD |

| Accounting Codes (same as header) |

| 3 More Sandwiches for students |            |          | 7.50      | 50 Each  | 225.00 USD |

| Accounting Codes | Values have been overridden for this line |

<table>
<thead>
<tr>
<th>Chart</th>
<th>Index</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>V</td>
<td>121101</td>
<td>620019</td>
</tr>
<tr>
<td>V</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Copy to other lines |

Vendor subtotal 2,090.00 USD

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 2,090.00
Total 2,090.00 USD

• Select the edit icon and changed the index/account codes.

• Select the Save icon.
• Review the Change Request in its entirety and select the **Submit Request** icon to submit the Change Request.

After selecting the **Submit Request** icon, you will be redirected to the Change Request Successful web-page. The Change Request flows through the same approval workflow like a PR.
HOW DO I RECEIVE MY ORDER?

To receive your order, select the icon. To view a specific order enter the PO Number. To view all orders select the icon. You can filter the results by searching by document type also. Select the appropriate PO and begin receiving the order.

Quantity Receiving (Entire Receipt)

After selecting the appropriate PO select the “Document Actions” menu in the top right corner of the PO, then select the link. A pop-up window will appear.

- Enter the Quantity received
  - This is prepopulated if you want to receive the entire line
- Enter the appropriate Line Status
- There is an error message saying “Invalid Quantity,” this will remove itself once you have filed the Quantity and selected the Complete icon.

Receive the entire order as needed, then select the Complete icon. You will then be redirected to the receipt for the order.
Quantity Receiving (Partial Receipt)

After selecting the appropriate PO select the “Document Actions” menu in the top right corner of the PO, then select the link. A pop-up window will appear.

- Enter the *Quantity* for all lines that have been received
- Enter the appropriate *Line Status*
- To remove the lines from the receipt that do not need receiving
  - Check the small box near the end of the line item
  - Select the **Remove Line** icon
  - You have just successfully removed the lines that do NOT need to be received.
- There is an error message saying “Invalid Quantity,” this will remove itself once you have filed the Quantity and selected the **Complete** icon.

Receive the entire order as needed, then select the **Complete** icon. You will then be redirected to the receipt for the order.
**Cost Receiving**

The only way to receive by using a cost receipt is to set up the PO using the *Declining Balance PO Form Request*.

After selecting the appropriate PO select the “Document Actions” menu in the top right corner of the PO, then select the link. A pop-up window will appear.

- Enter the Cost
- Enter the appropriate Line Status

You can receive the entire order, then select the icon or only receive the line item that has been shipped/services received.
HOW TO CANCEL AN ORDER

Under the list of Purchasing Forms, there is a form that must be filled to cancel a PO. Cancel PO Request. This is a form request and should be used by department to request the cancellation of a PO. In RealSource, *if an order has been received and/or invoiced it cannot be cancelled* using the Cancel PO Request form. This form requests works best with cancelling POs that were placed by shopping with a Non-Catalog Item form or a Purchasing Form. Most catalog orders cannot be cancelled and must be confirmed with the vendor prior to submitting the PO Cancellation Form Request. The vendor must cancel the order first. Catalog orders are almost always processed immediately.

To begin cancelling a PO, follow the steps below.

Start on the Shopping Dashboard and select the *Cancel PO Request* tile.

You will be redirected to the Cancel PO Request form.

- Proof the Instructions and select the *Next* icon.

After selecting the *Next* icon, begin filling the *Questions* portion of the form.
Complete the entire form and select the **Next >** icon.

After selecting the **Next >** icon, *Review and Submit* your Cancel PO Request Form.

Select the **Submit** icon.

The Request Form has now been submitted.

After selecting the **Submit** icon, you can view the Cancel PO Request Form Approval flow by selecting the **Form Approvals** link.
If all information is correct and approved, the PO will be cancelled. You will be notified by the icon in the top right corner of each web-page.

END

This Help-Guide was last updated on 11/11/19. Please check our website www.realsource.vcu.edu for the most recent version of the RealSource Help-Guide!