

NATIONAL CENTER FOR SUPERCOMPUTING APPLICATIONS (NCSA)

1010 NCSA Building, MC-257
1205 W. Clark St.
Urbana, IL 61801

Request to Purchase (RTP) Job Aid for a new purchase

- 1.) Access the RTP Tool in NCSA Savannah at <https://internal.ncsa.illinois.edu/mis/rtp/index.php>.
- 2.) Click on the *New RTP* link on the left side of the screen.

Navigation

- View All
- New RTP**
- View/Add Vendors
- Service Dates Report

Export as Excel

Filters

Status: All

Reqs assigned to me:

RTP number:

Search:

Fund:

Program Cd:

Fiscal Year:

Submit

Approvable records

	RTP #	Req #
(Type any comments here)	657	
Approved Submit		
(Type any comments here)	651	
Approved Submit		
(Type any comments here)	660	
Approved Submit		
Req Number:		
Account Code:	121300	
Commodity Code:		
(Type any comments here)	616	
Approved Submit		

- 3.) The *RTP entered by* field is automatically populated with your net ID and name.

New RTP

*RTP entered by: schronis
Sarah Chronister (schronis)
Please type the name or login, wait for the list to appear, then select the appropriate option.

*Requester of Purchase (Technical Contact):
Please type the name or login, wait for the list to appear, then select the appropriate option.

Extra Notifications:
Please type the name or login, wait for the list to appear, then select the appropriate option.

*Deliver To: NCSA Building

Admin Support Person:

This is a new purchase:

This is a Change Order Request:

This is a zero dollar agreement:

*Do you know the vendor you want to purchase from?: Yes No

Order Overview

*Account:
Please type the account number or name, wait for the list to appear, then select the appropriate option.

Percent on this account:



*Purchase benefit to University:

- 4.) If you are the requester of the purchase, put your name in the *Requester of Purchase (Technical Contact)* field. If you are requesting this on behalf of someone else, enter that person's name here.

The screenshot shows the 'New RTP' form. The 'Requester of Purchase (Technical Contact)' field is highlighted with an orange oval. The text in the field is 'Sarah Chronister (schronis)'. Below the field, there is a small green plus icon for adding more entries and a red minus icon for removing entries.

- 5.) If there is anyone else you would like to have access to this RTP, enter that name *under Extra Notifications*.

The screenshot shows the 'New RTP' form. The 'Extra Notifications' field is highlighted with an orange oval. The text in the field is 'Holly Highland (hjhigh)'. Below the field, there is a small green plus icon for adding more entries and a red minus icon for removing entries.

You can click the  button to add another entry. You can add multiple entries if needed. Use the  button to remove unwanted entries.

The screenshot shows the 'New RTP' form with two 'Extra Notifications' entries. The first entry is 'Holly Highland (hjhigh)' and the second entry is 'Matthew Schuldts (mschuldt)'. The second entry is highlighted with an orange oval. Below the second entry, there is a small green plus icon for adding more entries and a red minus icon for removing entries.

6.) Use the drop down box to indicate where this purchase will be delivered to. If this is not a physical good, pick your physical location. If you pick other, please provide full address.

The screenshot shows the 'New RTP' form in a web browser. The browser tabs include 'PunchOut', 'Request to Purchase', 'Application Navigator', 'Application/Tender Web Access', and 'Request for Order'. The URL is 'https://internal.ncsa.uiowa.edu/mis/rtp/index.php?page=newRTP'. The page title is 'Home > Request to Purchase > New RTP' and the user is logged in as 'Welcome, Sarah Chronister'. The form contains several fields: '*RTP entered by: schronis' with 'Sarah Chronister (schronis)'; '*Requester of schronis' with 'Purchase (Technical Sarah Chronister (schronis))'; 'Extra Notifications: hjhigh' with 'Holly Highland (hjhigh)'; and 'Extra Notifications: mschuldt' with 'Matthew Schultdt (mschuldt)'. The '*Deliver To:' dropdown is highlighted with an orange circle and is currently set to 'Other'. Below it, there are input fields for 'Other: NCSA Building' and 'Other: NPCF'. The 'Admin Support Person:' dropdown is also highlighted with an orange circle and is set to 'Other'. At the bottom, there are checkboxes for 'This is a new purchase:', 'This is a Change Order Request:', and 'This is a zero dollar agreement:'.

7.) Use the drop down box to indicate who your designated administrative support person is.

The screenshot shows the 'New RTP' form in a web browser, similar to the previous one. The browser tabs and URL are the same. The page title is 'Home > Request to Purchase > New RTP' and the user is logged in as 'Welcome, Sarah Chronister'. The form contains the same fields as in the previous screenshot. The '*Deliver To:' dropdown is now set to 'NPCF'. The 'Admin Support Person:' dropdown is highlighted with an orange circle and is open, showing a list of names: 'Amber Moore', 'Jean Solday', 'Deanna Spivey', 'Lisa Yanelo', 'Susan Vinson', 'Pam Joop', 'Vicki Halberstadt', 'Mo Clements', 'Stacy Walker', 'Rachel Park', and 'Other'. At the bottom, there is an '*Account:' field.

8.) Click the box for *This is a new purchase.*

*RTP entered by: schronis
Sarah Chronister (schronis)
Please type the name or login, wait for the list to appear, then select the appropriate option.

*Requester of schronis
Purchase (Technical Contact): Sarah Chronister (schronis)
Please type the name or login, wait for the list to appear, then select the appropriate option.

Extra Notifications: hjhigh
Holly Highland (hjhigh)
Please type the name or login, wait for the list to appear, then select the appropriate option.

Extra Notifications: mschuldt
Matthew Schuldt (mschuldt)
Please type the name or login, wait for the list to appear, then select the appropriate option.

*Deliver To: NPCF

Admin Support: Rachel Park
Person:

This is a new purchase:

This is a Change Order Request:

This is a zero dollar agreement:

*Do you know the vendor you want to purchase from?: Yes No

9.) If you know who the vendor is, click the Yes button. The vendor section will then populate below.

This is a new purchase:

This is a Change Order Request:

This is a zero dollar agreement:

*Do you know the vendor you want to purchase from?: Yes No

▼ Vendor

Vendor Lookup:

Vendor Name:

Vendor Number:

Address PO needs to be sent to:

Vendor Contact:

Vendor Phone:

Vendor Email:

▼ Order Overview

If you do not know which vendor you want to make the purchase from, you can click *No*. If this is the case, please enter the maximum budget amount **not** to be exceeded. If you chose “no”, skip to step number 11.

*Do you know the vendor you want to purchase from?: Yes No


Max budget not to exceed:

10.) Click *Lookup Vendor* to find your vendor. Type in the name of your vendor. Your vendor may not be available under this lookup, but the lookup listing will continuously grow. If your vendor does not populate from the search, type in the information into the appropriate fields. If you do not know the vendor number, leave the field blank. **Do not** enter a false or “dummy” number (ie. 123456).

When you find your vendor, click on the underlined vendor name. The vendor information will be pulled in. If you can add additional information such as *Vendor Contract*, *Phone* and *Email*, please do so.

11.) In the Order Overview section, add in your *Account* information (this is the CFOPA). As you type, you will see options to choose from. **Do not** choose the Non NCSA account option.

12.) Enter the percentage on this account of the purchase that will be applied to this CFOPA.





*Account: 1-200250-320000-320009-A19
NCSA ICR General FY20 ICR Finance Ops (1-200;
Please type the account number or name, wait for the list to appear, then select the appropriate option.


Percent on this account:

*Purchase benefit to University:

Attachment: No file selected.
You can attach a quote, license, or agreement here. For multiple files, submit the form first, then attach additional files as needed.


You can add additional CFOPAs by clicking the  button. Be sure to enter percentages for each CFOPA entered that add up to 100% in total.

 **Order Overview**



*Account: 1-200250-320000-320009-A19
NCSA ICR General FY20 ICR Finance Ops (1-200;
Please type the account number or name, wait for the list to appear, then select the appropriate option.

Percent on this account:



*Account: 1-200250-320000-320009-A07
NCSA ICR General FY20 ICR NPCF Building Exper
Please type the account number or name, wait for the list to appear, then select the appropriate option.

Percent on this account:

*Purchase benefit to University:

13.) Enter an explanation for how this purchase will benefit the University.

*Purchase benefit to University:

Attachment: No file selected.
You can attach a quote, license, or agreement here. For multiple files, submit the form first, then attach additional files as needed.

Order is a renewal

Order Details:

Part #	Description
Qty	x \$Unit Price

SubTotal: \$0

14.) If you have a quote, and you know the vendor you want to purchase from, attach it here using the *Browse* button. If you don't have a quote, skip to step 16.

*Purchase benefit to University:

Attachment: No file selected.
You can attach a quote, license, or agreement here. For multiple files, submit the form first, then attach additional files as needed.

Order is a renewal

Order Details:

Part #	Description
Qty	x \$Unit Price

SubTotal: \$0

15.) If you need to renew a contract, click the *Order is a renewal* box. Enter the *Previous PO* number if you have it. If it's not a renewal, leave the box unchecked.

*Purchase benefit to University:

Attachment: No file selected.
You can attach a quote, license, or agreement here. For multiple files, submit the form first, then attach additional files as needed.

Order is a renewal

*Previous PO #:

Order Details:


Part #	Description
Qty	x \$Unit Price

SubTotal: \$0

16.) Enter the *Part number, Description, Quantity, and Unit Price* under the order details section. Note that it is important to be very clear in this section as to what is being purchased, especially if there is no quote. If you do not know a part number, **do not** put in a false or “dummy” number.

Order Details: Part # [] Description []
 Qty [] x \$Unit Price []
 SubTotal: \$0


Total: \$0

You can use the  button to add additional line items.

Attachment: No file selected.
You can attach a quote, license, or agreement here. For multiple files, submit the form first, then attach additional files as needed.

Order is a renewal

Order Details: 5785920 MSI RTX 2080 SUPER VENTUS XS OC grap
 1 x \$718.57
 SubTotal: \$718.57



Order Details: 3598865 APC Replacement Battery Cartridge 140 Uj
 1 x \$491.98
 SubTotal: \$491.98

Total: \$1210.55

17.) To complete the payment information, click the *Deposit Required* box if a deposit is required. This should not apply to most purchases, but often services and conferences require deposits. For *Payment Information*, most payments should be due after the PO is executed and the vendor must send an invoice. However, some software, maintenance, and memberships require payment in advance of services. If there are any other important notes, enter in the *Payment due notes* box.

Total: \$1210.55

Deposit Required?

Payment Information: Full payment due in advance
 (Check all that apply): Payment due after the PO is executed, invoice required

Payment due notes: []
Other instructions for when payment due, such as "on delivery"

Desired Delivery Date: [] [] [] []
No date entered.

Service Start Date: [] [] [] []
No date entered.

Service End Date: [] [] [] []
No date entered.

*Goods Receipt Needed: Yes No

If your purchase happens to be \$10,000 or greater, you will also be required to either attach a small purchase waiver form or an additional quote from a competing vendor. Use the *Browse* button to attach the form or additional quotes.

*Small Purchase Policy: Small Waiver Purchase Form
 Comparable Quote
This purchase falls within the Small Purchase Policy, please select which required document is attached

*Attachment: No file selected.

18.) Indicate when you would like to have the product delivered by or the desired beginning date for a service in the *Desired Delivery Date* field.

Desired Delivery Date: / /
No date entered.

Service Start Date: / /
No date entered.

Service End Date: / /
No date entered.

*Goods Receipt Yes
Needed: No

19.) If this purchase is a service, membership, software with a term, etc., put in the *Service Start Date* and *Service End Date* fields. Note that these terms may have to be adjusted based on how long it takes to get a purchase order completed or a contract signed if applicable.

Desired Delivery Date: 5 / 15 / 2020
May 15, 2020

Service Start Date: 6 / 01 / 2020
Jun 1, 2020

Service End Date: 5 / 31 / 2020
May 31, 2020

*Goods Receipt Yes
Needed: No

20.) If you are making a purchase of less than \$5,000, but would like to review the invoice before it gets paid, mark that a goods receipt is needed. Otherwise, allow this to default to no. In some instances, you will be contacted by Receiving to ensure that the items can be received in regardless of what is picked here. If the purchase is over \$5,000, a goods receipt will need to occur.

May 31, 2020

*Goods Receipt Yes
Needed: No

tes

21.) Some programs require notes to be entered internally for Purchase Orders. If you have such notes enter them into the top box, *Internal notes to be entered on Purchase Order*. If you have any other notes that you consider to be important, enter into the bottom *Notes* box.

Notes

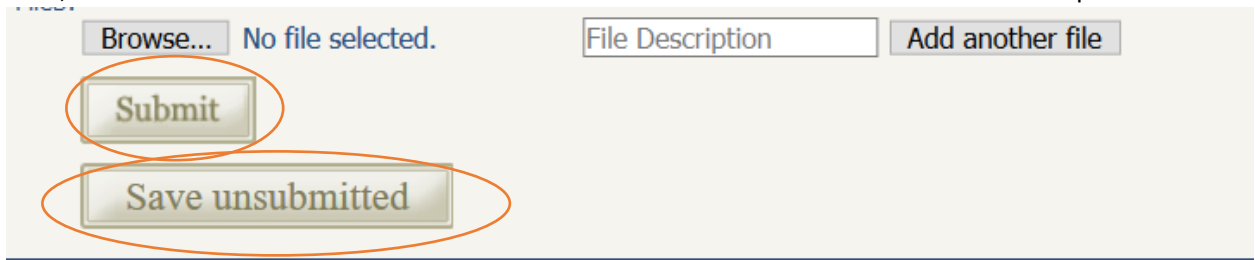
Internal notes to be entered on Purchase Order:

Notes:

22.) If there are any other files that are pertinent, please attach under Files by clicking *Browse*. This can include contracts, terms and conditions, comparable quotes, etc.



23.) If you are ready to submit your request, click *Submit*. If you want to save and come back at a later time, click *Save unsubmitted*. You will be able to edit the RTP and submit later with that option.



After your request is submitted:

- 1.) The PI (determined by CFOPA entered) will receive an email notification that there is an RTP awaiting their approval.
- 2.) After the PI approves, then the accountant from the Business Office for the CFOPA will receive notification an RTP is awaiting Finance approval and the Finance review is completed.
- 3.) Once the request has the Finance approval, the Procurement Specialist will review the order.
- 4.) The Procurement Specialist will either complete the purchase by completing a requisition in Banner or iBUY or will assign the request to the designated administrative support person to complete.
 - a. If a requisition is entered, the RTP enterer, Requester, and Extra Notifications will all receive emails indicating a requisition has been completed.
 - i. If there is a requisition number that begins with an "R", please note that this is going to the University Purchasing Office for review and a buyer from that office will issue the PO.
 - ii. If there is a requisition number that begins with a number, this means that it has been submitted through iBUY. Depending on the type of purchase, dollar amount, terms and conditions on a quote, etc., these requisitions may or may not have to be reviewed by the University Purchasing Office.
 - iii. If the requisition field is set to "P-card" this means that this request has been designated to be purchased with a P-card by the Procurement Specialist.
- 5.) Once a Purchase Order is entered into the PO field, notifications will go out that a PO has been entered. At this time, you will be able to see a copy of the PO and any signed documentation attached to the RTP.
 - a. If the PO number field is set as "P-card", this means that this request has been assigned to the indicated administrative support person to make the purchase. You can see this

under the *Purchasing* section.

Req Assigned To: schronis

Sarah Chronister (schronis)

Please type the name or login, wait for the list to appear, then select the appropriate option.

If you have any questions, please reach out to Carey Ann Cash in the Business Office at NCSA-purchasing@mx.uillinois.edu or 217-265-6396