I Want Doc - replaces webog.

Purpose/Use: The I Want Doc should be used by individuals (Requestors) that are unable to place the order for a good or service via e-shop (Cornell's on-line procurement tool) or by utilizing their individual procurement card.

Routing: Once completed, the Requestor has the ability to route the order to a supervisor for approval or to someone to add additional information to the order. If this step is not needed, the Requestor can click the submit button, the I Want Doc will route directly to the Financial Transaction Center (FTC) for processing.

Order Tracking/Status: Requestors will be notified by the FTC when their order has been placed with the Vendor and the status of the I Want Doc will change to Final. Tracking orders is possible via the “My Orders” component on the Procurement Gateway. https://gateway.procurement.cornell.edu/

Status Definitions:
- **Saved** - document has been saved by the Requestor prior to routing.
- **Enroute** - document is being routed and has pending approval requests.
- **Final** - document has received all required approvals and your Service Center has processed your order.
- **Disapproved** - document has been disapproved by an approver during the routing.
- **Cancelled** - document has been cancelled by the requestor prior to routing or by a reviewer during routing; routing stops.

Important Notes in Using the I Want Doc:

1) The best browser to use is Mozilla Firefox.

2) Do not use the back button on your browser. This may cause the I Want Doc to error. Use the navigation buttons on the bottom of the screens.

3) On various steps, you will see add buttons or save buttons. Please click these buttons to save information you have entered.

4) Routing/Final Submission of the form: For CoE CIS users, unless your supervisor requires review/approval or you need another individual to complete your order, you may skip the adhoc routing and hit the submit button. The FTC will obtain account approval for your order.

Questions regarding the I Want Doc can be sent to: ftccoecis@cornell.edu or call 255-8648.
Step #1 - Business Purpose, Dept/Unit Profile, Ship to Info

**Fields:**

**Document Description:** Defaults to “I Want Document# xxxxxxx” a unique reference # for the order request.

**Business Purpose:** The Business Purpose section explains the reason why the purchase is being made. It should answer who, what, where, when, and why. If this is being charged to a sponsored account please be sure to include how the purchase directly relates to the scope of the project. **This is a required field.**

**Organization Information:** Information used to route the I Want Doc to the correct Service Center for processing. The College/Organization and Department/Unit information may prepopulate based on your Human Resources profile. If it does not prefill or you are purchasing for a different College/Org or Department/Unit, please select from the drop down list. Select the “Set as Default” option to make this information appear for all future orders.

**Requestor:** This is the person initiating the I Want Doc and the profile information is based on their netid. This information cannot be changed.

**Deliver To:** This is the person the order should be delivered to.
- If the Requestor and Deliver to person are the same, please check “Same as the Requestor” and the delivery information will prepopulate.
- If the Deliver to person is different than the Requestor:
  - List the person’s net id and hit enter. Their information will prefill. You may edit the information if necessary.
  - Manually enter the shipping information.
  - Search for an individual by selecting the magnifying glass and entering information in one of the search fields. When you have found the correct individual, select return value on the left hand side of the screen for the info to populate the I Want Doc.
Step#2 - Items to order and Account information

![Image of the I Want Document Step 2 interface](image)

Step#2 – Items and Account Info:

Fields:

**Add Item:** This section is used to list the goods or services requested. If you have a quote you may reference the quote# in the description field and list the total in the unit cost field. The quote must then be attached in step#3. The save button must be selected in order for the item to be added to the order.

**Account Info:** Two options are available for providing account information.

1. If the account number to charge is unknown, provide a description of the account in the “account description box” such as “NSF research account” or “salary recovery account” (etc.). Enough detail should be provided that someone will be able to easily identify the appropriate account.

2. If the account number is known, provide as much of the account number in the various account boxes. A look up is available for the account number. Select the magnifying glass and provide information in the provided search fields. When the correct account is identified, click “return value” and the account number will carry through to the I Want Doc.
Step#3 – Vendor Info, Additional Info, Notes and attachments:

Fields:

Vendor Information: Please provide as much Vendor information as possible. Vendor contact information may include the following: address, phone/fax, email, contact name, web url.

Additional Info:
Services – For insurance purposes, please indicate if services will be performed on campus.

Miscellaneous: Comments/Special Instructions – Please list any information regarding the order that needs to be communicated to the Service Center or the Vendor. Examples would include expediting shipping, special delivery instructions or a need by date.

Notes and Attachments: Add any documents that need to be sent to the Service Center or Vendor with the order. Examples would include quotes, specifications, sole source form, and contracts (etc.). Please be sure to click the add button.
Step# 4 – Routing and Final Submission

Step#4 – Optional Routing/Submission:
Fields:
Optional Routing: The I Want doc is able to be routed to other individuals prior to submission to the Service Center for processing. Reasons for optional routing may include:
1. Another individual may need to complete the I Want Doc by providing account, vendor, etc.
2. Used to obtain Supervisor of Department/Unit approval.

In order to adhoc route an order, list the individual’s Cornell netid in the space provided. To lookup an individual click on the magnifying class. Enter the individuals name, click search and when found, click return value. Once the net id is listed, click save.

Submission: Click the submit button to either submit the I Want Doc to the individual listed in the routing section or to route directly to your Service Center for processing.
When the Service Center has completed processing the request you will receive a notice that your order is complete.

Tracking of your order is possible via the My Orders on the Procurement Gateway.

Status Definitions:

Saved - document has been saved by the Requestor prior to routing.
Enroute - document is being routed and has pending approval requests.
Final - document has received all required approvals and your Service Center has processed your order.
Disapproved - document has been disapproved by an approver during the routing.
Cancelled - document has been cancelled by the author prior to routing or by a reviewer during routing; routing stops.