

Outgoing Subaward Standing Order Step by Step

Office of Research Administration

Step 1: Open a new, “Non-Catalog Item” cart

The screenshot displays the 'Shopping Home Page (CataMart)' interface. The browser address bar shows the URL: <https://solutions.sciquest.com/apps/Router/DashboardUserDetails?id=636982&tmstmp=1734355832075>. The page header includes navigation links such as 'Requisitions', 'Search (Alt+Q)', and a currency display of '30,595.00 USD'. The main content area is titled 'Dashboards • Shopping Home Page (CataMart)' and features a 'Shop' section with tabs for 'Simple' and 'Advanced'. A search bar is present with the placeholder text 'Search for products, suppliers, forms, part number, etc.'. Below the search bar, there are two main sections: 'New Supplier Request Form' and 'Supplier Direct Pay Request'. The 'Punch-Out' section is prominently displayed, showing a grid of supplier logos including Amazon Business, CDWG, DELL, FASTENAL, Lowe's ProServices, Fisher Scientific, ThermoFisher Scientific, Cox Connection Computer Products, GRAINGER, Apple, B&H, MCK, VWR International, FSI office supplies, Thomas Scientific, BLACKHAWK, and HENRY SCHEIN. The 'Forms' section at the bottom includes a link for 'Gift Card Authorization'. The 'Non-Catalog Item' link in the top navigation bar is circled in red.

Shopping Home Page (CataMart) | Copilot | Microsoft 365

https://solutions.sciquest.com/apps/Router/DashboardUserDetails?id=636982&tmstmp=1734355832075

Import bookmarks... Getting Started Teams and Channels | ... InfoEd's eResearch Por... Banner Report Portal Chrome River Talent Mgmt CataMart eProcurement InfoEd ITEMS Tickets ORA Webpage XM Projects | Qualtrics Ex... CATalytics Dashboard ... WCU-ITHelp Adobe Sign

Requisitions Search (Alt+Q) 30,595.00 USD

Dashboards • Shopping Home Page (CataMart)

Accounts Payable Dashboard Shopping Home Page (CataMart) Window Snap

Shop

Simple Advanced

Go to: Favorites | Forms | **Non-Catalog Item** | Quick Order Browse: Suppliers | Categories | Contracts | Chemicals

Search for products, suppliers, forms, part number, etc.

New Supplier Request Form

Supplier / Individual Request Form

Supplier Direct Pay Request

Supplier Direct Pay Request

Punch-Out

Punch-out

amazonbusiness CDWG DELL FASTENAL Lowe's ProServices Fisher Scientific

ThermoFisher Scientific formerly life Cox Connection COMPUTER PRODUCTS GRAINGER Apple B&H MCK

VWR International FSI office supplies Thomas Scientific BLACKHAWK HENRY SCHEIN

Forms

Gift Card Authorization

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Step 2: Add a new, “Non-Catalog Item” cart

Shopping Home Page (CataM... X Copilot | Microsoft 365 X +

https://solutions.scoquest.com/apps/Router/DashboardUserDetails?id=636982&dtmstp=1734355832075

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Requestions Search (Alt+Q) 30,595.00 USD

Dashboards

Accounts Payable Dashboard

Shop

Simple

Search for products

New Supplier Request

Supplier Direct

Gift Card Authorization

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Add Non-Catalog Item

Existing Supplier

Select Supplier **1**

Item

Product Description *	Item No. *	Quantity *	Price Estimate *	Packaging
2	3	4	5	EA - Each 6

254 characters remaining

Additional Details

Commodity Code **7** Manufacturer Name Manufacturer Part No.

Product Flags

- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material
- ☐ Radioactive
- ☐ Rad Minor
- ☐ Select Agent
- ☐ Toxin
- ☐ Energy Star
- ☐ Green

★ Required fields **8** Save Save And Add Another Close

Fields	Description
1. Select Supplier	Enter the name of the Subawardee. May need to complete a new supplier request for new vendors. Reach out to Tamrick Mull (tmull@wcu.edu) for guidance.
2. Product Description	“Subawardee Name” Outgoing Subaward – “Subaward Number” (Budget Year Start Date – Budget Year End Date) Example: UNCA Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)
3. Item No.	“Standing PO”
4. Quantity	“1”
5. Price Estimate	Total awarded amount for one budget year of the subaward
6. Packaging	“LO-Lot”
7. Commodity Code	“1”
8. Save	Click the purple “Save” button at the bottom

Step 2: Add a new, “Non-Catalog Item” cart EXAMPLE

Shopping Home Page (CataMart) | Copilot | Microsoft 365

https://solutions.sciquest.com/apps/Router/DashboardUserDetails?Id=636982&tmstmp=1734355832075

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Dashboards • Shopping Home Page (CataMart)

Accounts Payable Dashboard

Shop

Simple Advanced

Search for products, suppliers, and services

New Supplier Request

Supplier / Invoice

Supplier Direct Pay Request

Supplier

Add Non-Catalog Item

Existing Supplier

University of North Carolina Asheville University of North Carolina Asheville

Fulfillment Address

☒ PO Purchase Order 1 - 1 University Hts, Asheville, North Carolina 28804-3251 United States

☐ PO Purchase Order 2 - Accounts Payable, Cpo 1423, 119 Phillips Hall, Asheville, North Carolina 28804 United States

Distribution Methods

Item

Product Description ★	Item No. ★	Quantity ★	Price Estimate ★	Packaging
UNCA Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)	Standing PO	1	30595.00	LO - Lot

194 characters remaining

Additional Details

Commodity Code 1

Manufacturer Name

Manufacturer Part No

Product Flags

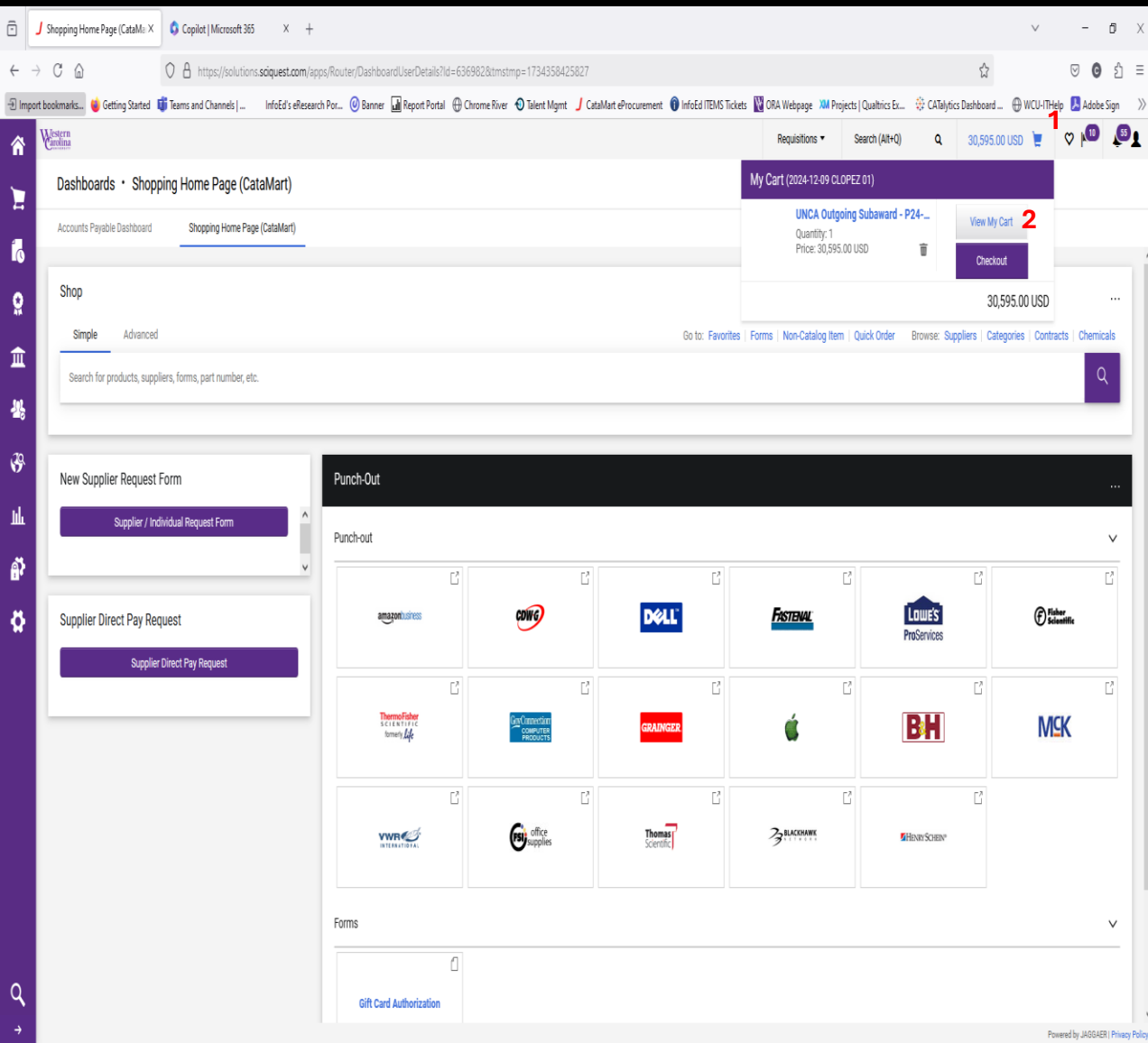
- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material
- ☐ Radioactive
- ☐ Rad Minor
- ☐ Select Agent

★ Required fields

Save Save And Add Another Close

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Step 3: View your cart



Fields	Description
1. Shopping Cart	Click the “Shopping Cart Icon” at the top right of the CataMart Screen
2. View My Cart	Click “View My Cart”

Step 4: Review and name cart

Cart - Draft Requisition 1952781 X

Copilot | Microsoft 365

https://solutions.sagequest.com/apps/Router/SimpleCart?ReqId=1952781&ShoppingType=materialShop×tamp=1734359335994

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Requisitions Search (Alt+Q) 30,595.00 USD

Assign Cart Proceed To Checkout

Shopping Cart • 195278181

Simple Advanced

Search for products, suppliers, forms, part number, etc.

1 Item

University of North Carolina Asheville • 1 Item • 30,595.00 USD

SUPPLIER DETAILS PO Purchase Order 1: 1 University Hts, Asheville...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
UNCA Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)	Standing PO	LO	30,595.00	1 LO	30,595.00

ITEM DETAILS

Commodity Code 1

Taxable

Capital Expense

Summary

Details

For Cameron Lopez

Name 123456 Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)

Total (30,595.00 USD)

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

Total: 30,595.00

Fields	Description
1. Review Cart	Review the cart for accuracy
2. Name the cart	“Fund Number” Outgoing Subaward – “Subaward Number” (Budget Year Start Date – Budget Year End Date) Example: 123456 Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)
3. Assign Cart (Optional)	Only do this if you do not have requester access for the fund number associated with the subaward. Assign to Tamrick Mull or Sara Leopard in Accounts Payable.
4. Proceed to Checkout	Click “Proceed to Checkout” to begin assigning fund number, account codes, and attaching internal documents

Step 5: Assign fund number and account code(s) associated with your outgoing subaward

Requisition * 195278181

Summary PD Preview Comments Attachments History

General **Shipping** **Billing**

Cart Name: 123456 Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)
Description: no value
Priority: Normal
Requestor: Cameron Lopez
Shopper: Cameron Lopez
PO Clauses: no clause
Standing Order: ☒

Ship To: Contact Line 1 Cameron Lopez
Phone: +1 828-527-7203
Email: clopez@wcu.edu
Western Carolina University
65 East University Way
Candala Camp 110
Cullowhee, NC 28723
United States

Bill To: Western Carolina University
Accounts Payable
65 West University Way
301 HRF Admin Bldg
Cullowhee, NC 28723
United States

Delivery Options
Expedite: ☒
Accounting Date: no value
Ship Via: Best Carrier-Best Way
Requested Delivery Date: no value
Buyer Information
Buyer: no value Phone: no value Email: no value

Handling Instructions
Handling Instructions: Mail to Payee
Fill out if Department Representative option was chosen from above: no value

Accounting Codes

Fund	Organization	Account	Program	Activity	VC	Amount of Price
123456	230355	219924	142	Community Services	no value	25,000.00 USD
123456	230355	219925	142	Community Services	no value	5,595.00 USD

Edit Accounting Codes

Accounting Codes

Fund * **2** Organization * **1** Account * **3** Program * **1** Activity VC * **4** Amount of Price

123456	230355	219924	142	Search		25,000.00
123456	230355	219925	142	Search		5,595.00

Document subtotal: 30,595.00 USD
Split Total 30,595.00 USD

★ Required fields

5 Save Close

Fields	Description
1. Accounting Codes	Scroll down to the “Accounting Codes” section and click the “Pencil” icon on the right. This will open the “Edit Accounting Codes” box
2. Enter the Fund Number associated with your subaward	Enter the fund number associated with your subaward
3. Apply the appropriate split for account codes	Use 219924 for the 1 st \$25,000 of the subaward. If the subaward is for more than \$25,000, use 219925 for the remaining balance over \$25,000
4. Select “Amount of Price”	Be sure to select “Amount of Price” from drop down instead of “% of Quantity”
5. Save	Click purple “Save” button. Make sure Approver on the “Summary” pane on the right side of the screen is the PI of the fund. Make sure Subtotal on the “Summary” pane on the right side of the screen matches the subaward amount for the current budget year.

Step 5: Assign fund number and account code(s) associated with your outgoing subaward

EXAMPLE

Requisition • 195278181

Summary

PO Preview

Comments

Attachments 1

History

General

Cart Name

123456 Outgoing Subaward - P24-076-SUB-01 (7/1/2024-6/30/2025)

Description

no value

Priority

Normal

Requestor

Cameron Lopez

Shopper

Cameron Lopez

PO Clauses

no clause

Standing Order

✗

Shipping

Ship To

Contact Line 1 Cameron Lopez

Phone: +1 828-227-7203

Email: clopez@email.wcu.edu

Western Carolina University

69 East University Way

Cordelia Camp 110

Cullowhee, NC 28723

United States

Delivery Options

Expedite

✗

Accounting Date

no value

Ship Via

Best Carrier-Best Way

Requested Delivery Date

no value

Buyer Information

Buyer

Phone

Email

no value

no value

no value

Billing

Bill To

Western Carolina University

Accounts Payable

65 West University Way

301 HFR Admin Bldg

Cullowhee, NC 28723

United States

Handling Instructions

Handling Instructions

Mail to Payee

Fill out if Department Representative option was chosen from above

no value

Accounting Codes

Fund	Organization	Account	Program	Activity	VC	Amount of Price
123456	230355 Human Services	219924 Sub Awards LE \$25000	142 Community Services	no value	no value	25,000.00 USD
123456	230355 Human Services	219925 Sub Awards GT \$25000	142 Community Services	no value	no value	5,595.00 USD

Summary

Be aware of these issues.
You may review and proceed.

Splitting by 'Amount of Price' at the header prevents changes to Accounting Codes at the line. If you need to make changes at the line, choose a different split method at the header.

Total (30,595.00 USD)

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

Subtotal

Subtotal

30,595.00

30,595.00

What's next for my order?

Next Step

Approver

Approver

Fund PI

Workflow

Draft

Active

Cameron Lopez

Banner Budget Authorization

Future

Approver

Future

Grants

Future

Banner Budget Authorization 2

Future

Create PO

Future

Edit Accounting Codes

Accounting Codes

Fund ★	Organization ★	Account ★	Program ★	Activity	VC	Amount of Price
123456	230355	219924	142	Search		25,000.00
123456	230355	219925	142	Search		5,595.00

Document subtotal: 30,595.00 USD
Split Total 30,595.00 USD

★ Required fields

Save

Close

Step 6: Add internal notes and attach subaward agreement

Fields	Description
1. Internal Notes and Attachments	Scroll down to the “Internal Notes and Attachments” section and click the “Pencil” icon on the right. This will open the “Edit Internal Notes and Attachments” box
2. Add note	Standing PO for an outgoing subaward to “Subawardee” in the amount of “ Current Budget Year Total” for the period between “Budget Year Start Date” to “Budget Year End Date”. Click purple “Save” button Example Standing PO for an outgoing subaward to UNCA in the amount of \$30,595 for the period between 7/1/2024 to 6/30/2025.
3. Add Internal Attachment	Add the fully executed subaward agreement for this subaward. Click purple “Save Changes” button

Internal Notes and Attachments 1  ...			External Notes and Attachments  ... 	
Internal Note	2 Standing PO for an outgoing subaward to UNCA in the amount of \$30,595 for the period between 7/1/2024 to 6/30/2025.		Note to all Suppliers	no value
Internal Attachments 3		Date Add	Attachments for all suppliers	Add
Fully Executed Subaward.pdf		11/13/2024 ...		

Step 7: Review and submit cart

Fields	Description
1. Review cart	Review cart to make sure all relevant information is entered accurately
2. Assign or Submit Cart	Click the “Assign Cart” button at the top right of the CataMart page. This option is available if you are not a requestor for this fund. Please assign the cart to Sara Leopard or Tamrick Mull. Click the purple “Place Order” button to submit the cart and send to grant fund PI for approval.
3. Record requisition number (optional)	Record the requisition number for quick look-up and reference.

Questions?

Please reach out to the Post Award team in the ORA

Post Award Grant Specialist
Cameron Lopez
Ext: 2576
Email: clopez@wcu.edu