Catering Services with the University's Dining Services Provider –
Gourmet Dining (UNC #1539 – Expires 06/30/2030)

Please visit the **Catering Services** page and the **Dining Services Forms, Policies, and Guidelines** page for detailed information related to food services and catering. Catering Services can be contacted at **973-655-6914** or **msucatering@montclair.edu**.

Contents

Montclair Campus Catering Punch-Out information

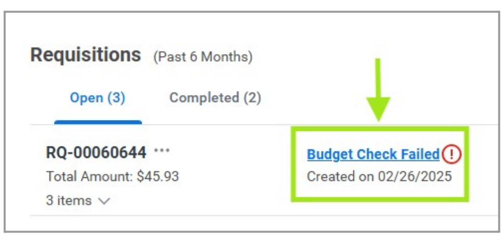
- This Punch-Out process is currently for the Montclair campus only.
- To export a catering order to Workday, you must start the process in Workday.
- A Workday Punch-Out requisition must be submitted, approved and converted to Purchase Order (PO) for every Montclair campus Gourmet Dining catering order.
- For events that may require **serving staff, linens or other special items** you should **NOT** export your order to Workday until catering has reviewed your order (refer to **save quote** instructions on page 10).
- Each catering order number MUST be on its own requisition. **DO NOT** add multiple catering orders to one requisition.

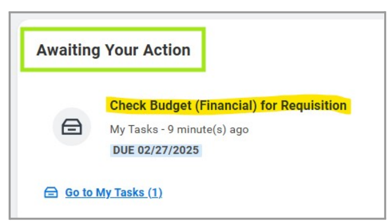
- The role that can initiate the process in this job aid in Workday is Cost Center Requisitioner.
- After your event has taken place and catering services have been provided, the requisitioner must Create Receipt on the PO in Workday as immediately as possible.
- **DO NOT** email Gourmet Dining invoices anywhere. (Punch-Outs have e-invoicing and invoices are transmitted electronically to Workday.)
- Requisitioners are responsible for clearing any invoice match exceptions to ensure that Gourmet Dining gets paid promptly. (see section X of this document regarding **Match Exceptions**)
- If you need to place an order within 72 hours of your event date, contact Catering Services by email to msucatering@montclair.edu or phone to 973-655-6914.
- If you need to order a special menu or need assistance from Catering in planning your event, contact catering via msucatering@montclair.edu or 973-655-6914.

IMPORTANT! Before you begin this process

✓ **Gather your event details**, e.g., event date, building/room #, event start and end times, host name(s), cost center#, requisitioner email, guest count, food allergies, etc.

✓ **Review your budget** by running the R002 or R134 report to ensure that you have enough funds available for the requisition to pass budget check. For regular cost centers, catering budget is pulled from **Budget Pool - General Operating 60510: Catering Services and Fees.** If you are using a Grant Worktag, please refer to your budget narrative. If you do not have enough funds available, your requisition will fail budget check and not get submitted.





INSTRUCTIONS

I. Create a Catering Punch-Out Requisition

IMPORTANT: Make sure that you have only one Workday window/tab open. **DO NOT** try to export multiple orders via multiple Workday windows/tabs. You will get an error.

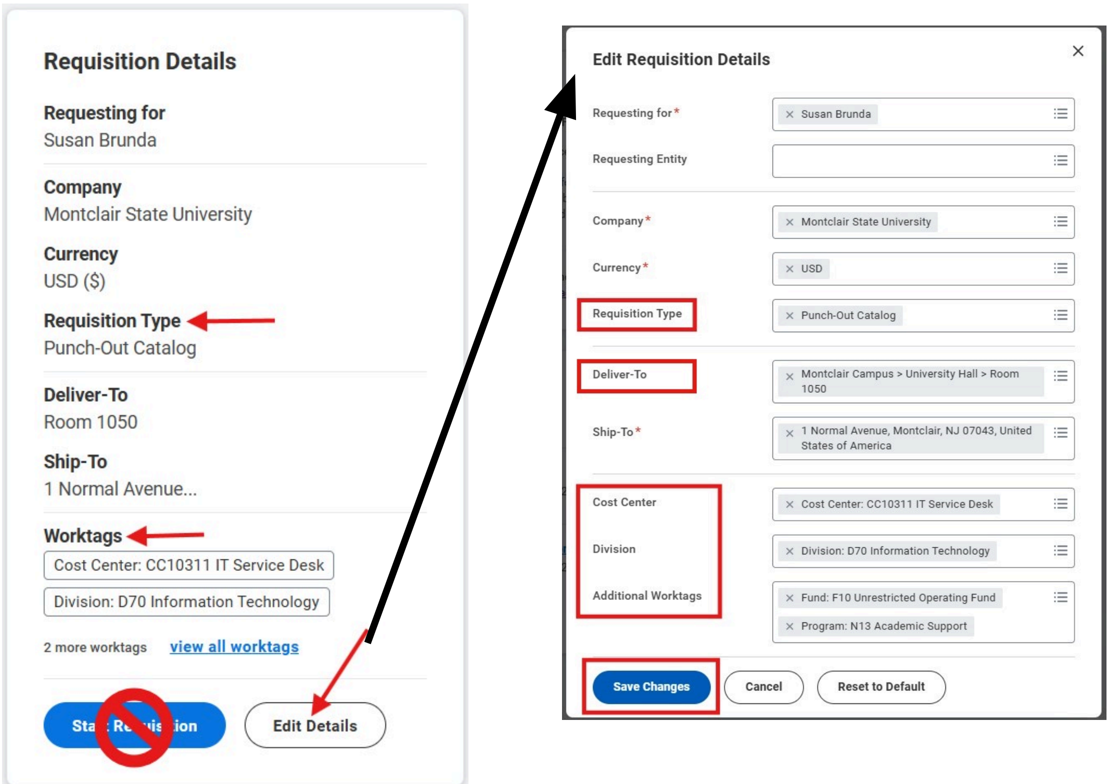
1) In the Workday search bar, type **Create Requisition**, and select the same from the list of results displayed.

The **Requisitions dashboard** screen displays.

2) On the dashboard, locate the **Requisition Details** section.

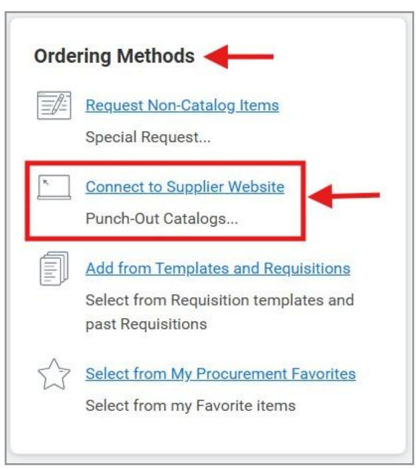
Click the **Edit Details** button to edit your requisition details as follows:

- The **Requisition Type** must be **Punch-Out Catalog**.
- Confirm the Cost Center, Division and Additional Work Tags are correct, or change as needed.
- The **Deliver To** address in the **Requisition Details** should be changed to your **Event building** and **Event room number** (the same as what will be on your E-Cater order).
- Click the **Save Changes** button. You will be returned to the Requisitions dashboard.
- **DO NOT CLICK** Start Requisition.



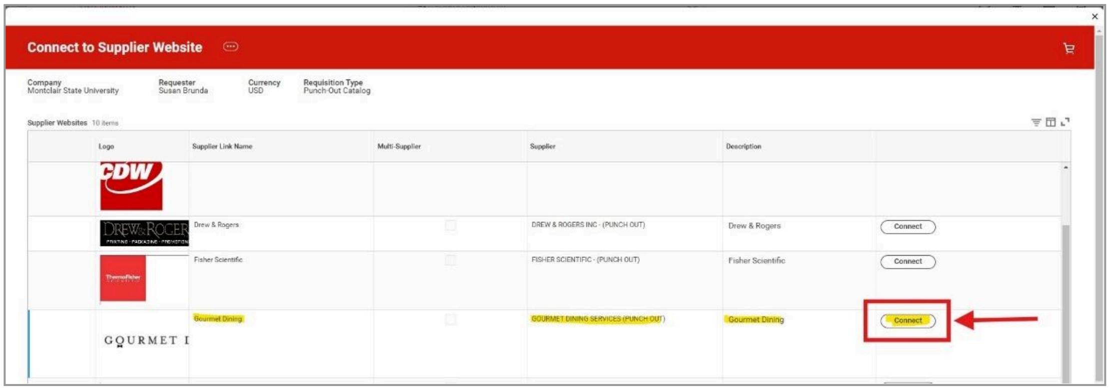
3) Scroll down to the **Ordering Methods** section.

4) Select **Connect to Supplier Website** Punch-Out Catalogs.



The **Connect to Supplier Website** table will appear with a list of available Punch-Out catalogs.

5) Locate the line for **Gourmet Dining Services (Punch-Out)** and click **Connect**.



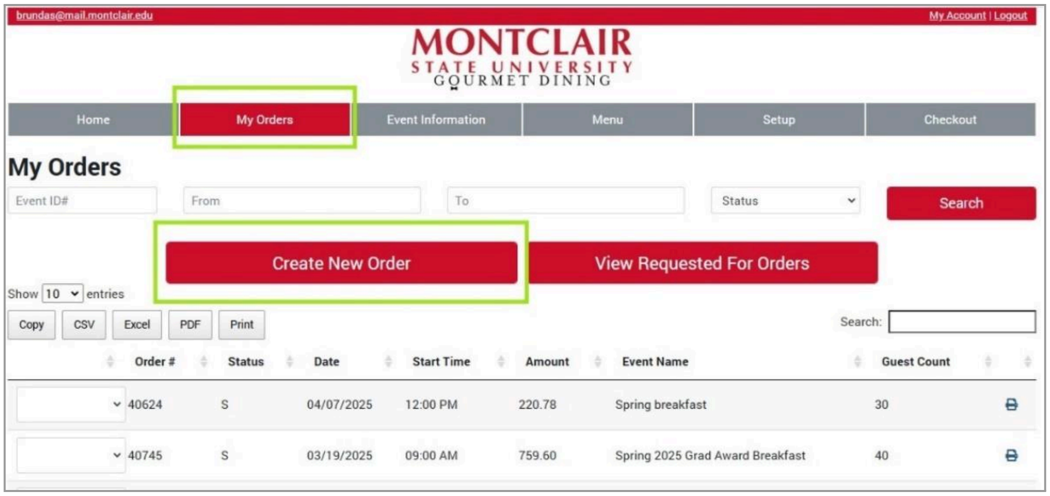
You will see this message while the Punch-Out is loading.

***** You are now working within the Gourmet Dining Services E-Cater Punch-Out Catalog.** If you have questions about how to navigate within the E-Cater Punch-Out beyond what is in this job aid, please contact Catering Services at 973-655-6914 *******.

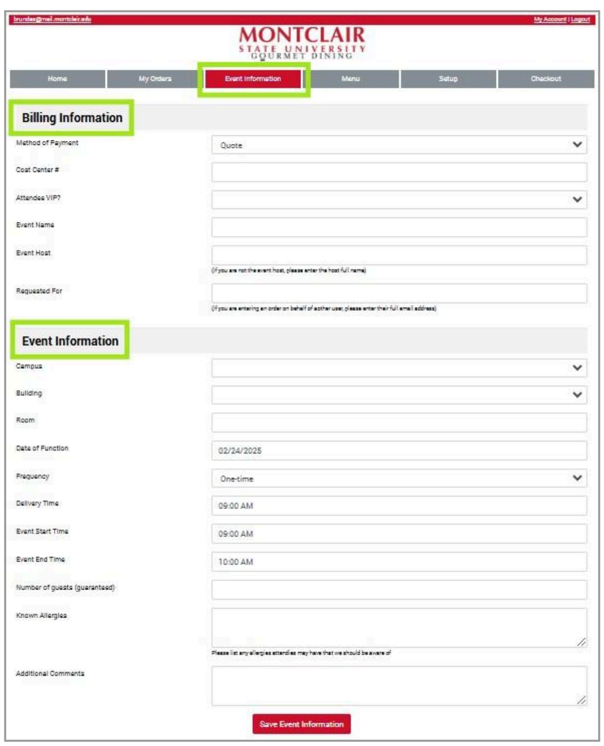
II. Create New Order within Gourmet Dining Services E-Cater

The Punch-Out opens and you are on the **My Orders** page.

1) To begin creating a **NEW** order/event, click **Create New Order.**



2) You are now on the **Event Information** page.



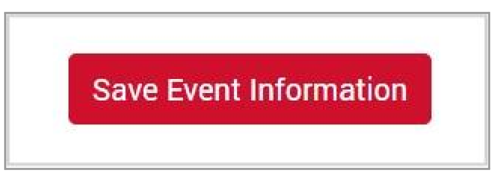
Scroll down to the **Billing Information** section and complete the following fields:

- **Method of Payment** — select **Quote**
- **Cost Center #** — **REQUIRED!** enter the CC# that catering funds will be paid from
- **Attendee VIP?** — select an option from the drop-down menu
- **Event Name** — type a brief but descriptive event name
- **Event Host** — if you are not the event host, please enter the host full name
- **Requested For** — if you are **not** a Workday requisitioner, enter the **@montclair.edu** email address of the requisitioner in this field. If you are the requisitioner you can leave this field blank.

Scroll down to the **Event Information** section and complete the following fields:

- **Campus** — select **Montclair Campus**.
- **Building** — **REQUIRED!** select the building name where the event will take place
- **Room** — **REQUIRED!** enter the room number where the event will take place
- **Date of Function** — select the event date from the calendar
- **Frequency** — select an option from the drop-down menu
- **Delivery Time** — select a catering DELIVERY time from the drop-down menu
- **Event Start Time** — select the EVENT START TIME from the drop-down menu
- **Event End Time** — select the EVENT END TIME from the drop-down menu
- **Number of guests (guaranteed)** — **REQUIRED!** enter the # of guests
- **Known Allergies** — As the event host, it is incumbent on you to learn of and indicate all of your guests' dietary restrictions in this part of your order. If you don't have this information at the time of your initial order, please be sure to go back and enter this information once you receive RSVPs from your guests.
- **Additional Comments** — enter if applicable

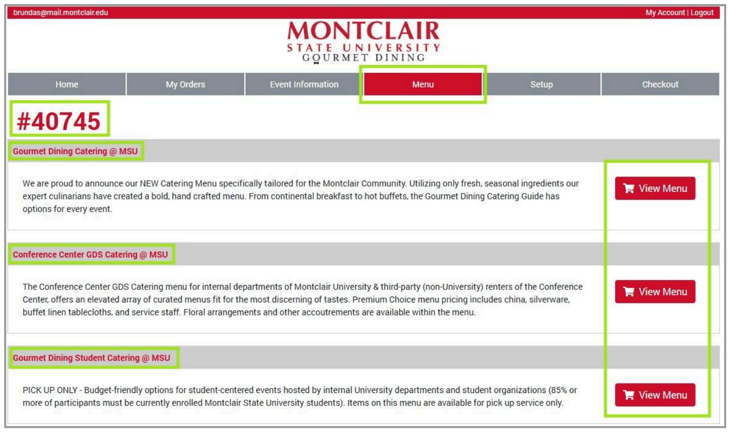
3) When you are finished entering the Billing and Event information, click **Save Event Information**.



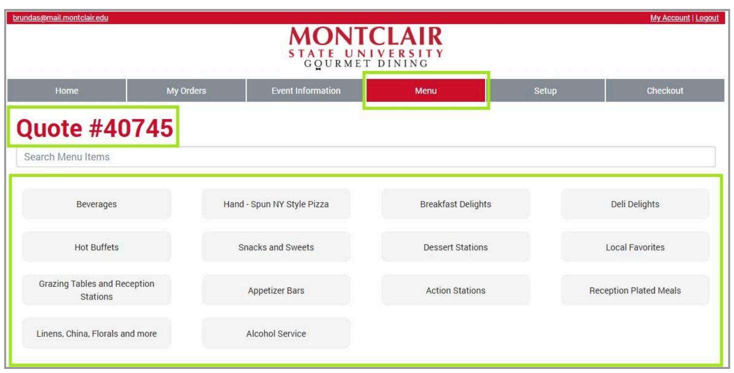
Notice that the **Menu** tab is now **red**, indicating it is the active tab you are working in. There will be an **order #** at the top of the page. **Write down your order #** for future reference.

4) **Adding menu items** to your order:

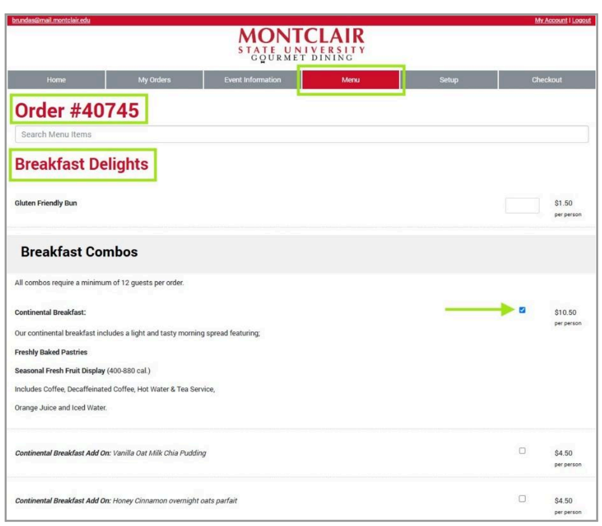
a. From the available options, read the menu descriptions and click the appropriate red **View Menu** button.



b. You will see a group of sub-menus. **Click a sub-menu**, e.g. Beverages, Hot Buffets, etc. to view choices available within each category and begin adding items to your cart.



c. Scroll through the menu offerings, selecting the menu items that you wish to order.



d. Scroll to the bottom of the page. You will see three buttons. **PLEASE READ the two bullet points below before clicking!**

If you click:

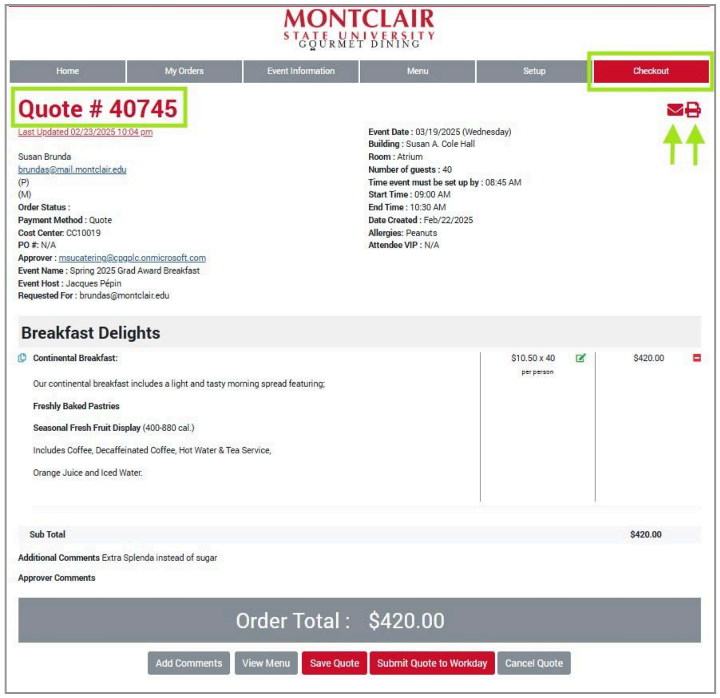
- **Save & Continue Shopping**, this means that you can continue adding menu items to your order. The page will refresh and you will be brought back up to the top of the page. To continue adding menu items, click **Menu** in the top navigation bar and follow instructions from **step 4) a.**

OR…

If you click:

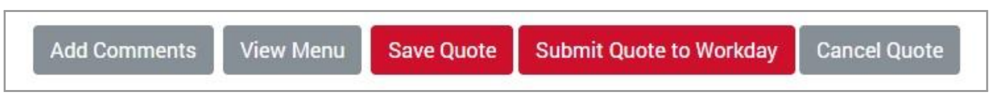
- **Save & Checkout**, this means that you are finished making all menu selections for this order and NO serving staff, linens or other speciality items need to be added to your order by catering*****. You will now see a detailed summary of your Quote#/order as shown in the image on the next page. Notice the icon to print your order. Print your Quote#/order summary for future reference. **Please double check your order** to make sure nothing was missed or entered incorrectly. Proceed to step 5) on the next page.

***IMPORTANT:** If your event/venue may require **serving staff, linens or any other specialty item(s)**, **DO NOT** click Save & Checkout. If you are unsure if your event will require any of the aforementioned items **DO NOT** click Save & Checkout. You should instead select the option for **Save & Continue Shopping** or exit the punch-out by closing your window. Catering will review your order# in E-cater and add any required serving staff and/or linens. After catering has approved your order in E-cater, they will email you to let you know that the order is ready to export to Workday. After you receive the email from catering, follow instructions in section V of this job aid for Exporting Saved E-Cater Quotes to Workday to Submit a Requisition.*



5) Scroll to the bottom of your quote summary.

Notice there are two **RED** buttons. **PLEASE READ the two bullet points below before clicking!**



If you click:

- **Save Quote**, your catering order is saved within the E-Cater system and can now be viewed by catering staff. You should select Save Quote if your event/venue may require **serving staff, linens or any other specialty item(s)**. Your Punch-Out requisition is NOT finalized and a purchase order will NOT be issued*. You are brought back to the **My Orders** page within the E-Cater system. From there you can continue creating additional events, editing orders, etc. **OR**, if you are finished working in E-Cater, you can close the window**. Note that closing the window will also close your Workday session.

  **Catering will review your order# in E-cater and add any required serving staff, linens or speciality items. After catering has approved your order in E-cater, they will email you to let you know that the order is ready to export to Workday. After you receive the email from catering, follow instructions in section V of this job aid for Exporting Saved E-Cater Quotes to Workday to Submit a Requisition.*

  ***To access a saved quote at a later time to export it to Workday, follow steps in V. Exporting Saved E-Cater Quotes to Workday to Submit a Requisition.*

OR…

If you click:

- **Submit Quote to Workday**, this means that you are **finalizing** your catering order and will be brought back into Workday to complete the **Punch-Out** requisition process.

  DO NOT "continue shopping" to add another E-Cater order to your requisition. **Proceed to section III** of this job aid to review and submit your Punch-Out Requisition in Workday.

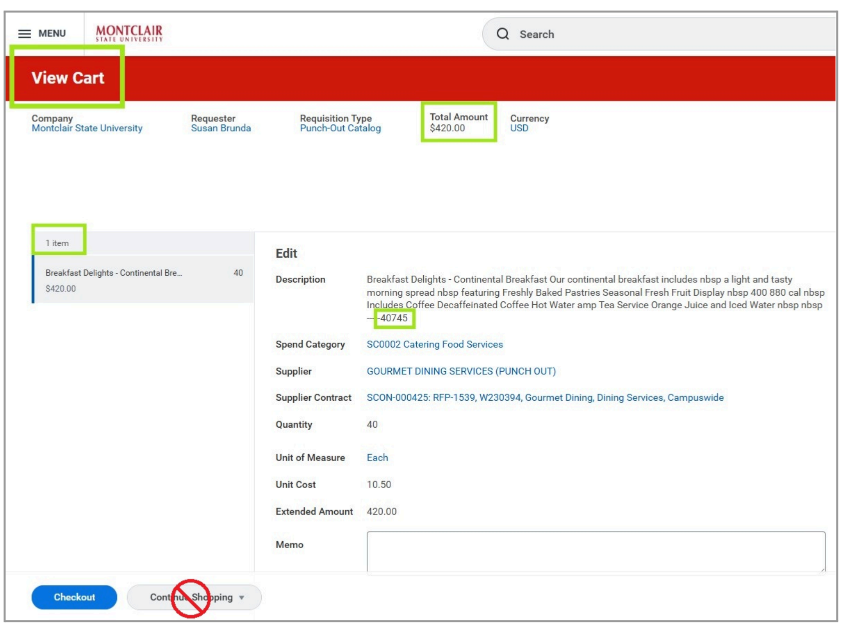
III. View Cart in Workday and Checkout to Submit Requisition

You have clicked either *Submit Quote to Workday* or *Export to Workday* from within the E-Cater Gourmet Dining Punch-Out. **You are now back in Workday.**

IMPORTANT! A catering requisition should only have ONE (1) E-Cater order# on it. DO NOT "continue shopping" to add another E-Cater order to your requisition.

The red banner across the top of the page will say **View Cart**. Notice that your **E-Cater order number** is listed at the end of the item description of each line.

1) Review your Workday cart. The lines in your cart should match the lines on your E-Cater Quote summary.

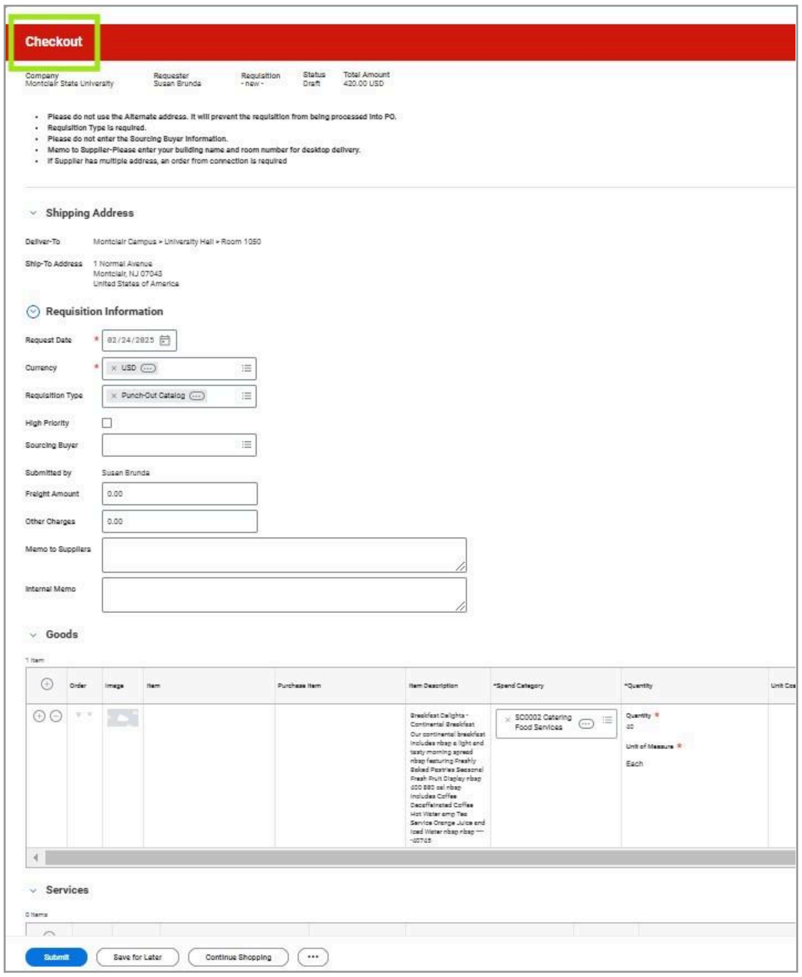


***OPTIONAL**: If at this step you determine you need to change your order and **DO NOT** want to **CHECKOUT** to complete your requisition, go to **Section IV** of this job aid.*

2) When you are ready to continue submitting your requisition, click **Checkout**.

The Workday **Checkout** screen will display.

IMPORTANT! DO NOT add or delete Goods Lines. DO NOT make any changes to the item description, qty or unit cost on your Goods line(s). DO NOT "continue shopping" to add another E-Cater order to your requisition. You may edit the memo and cost center/additional worktags as needed. If you need to split the cost of your requisition among cost centers/grants, etc., refer to instructions for Split the Cost of a Line Item in the Procurement Lifecycle job aid.



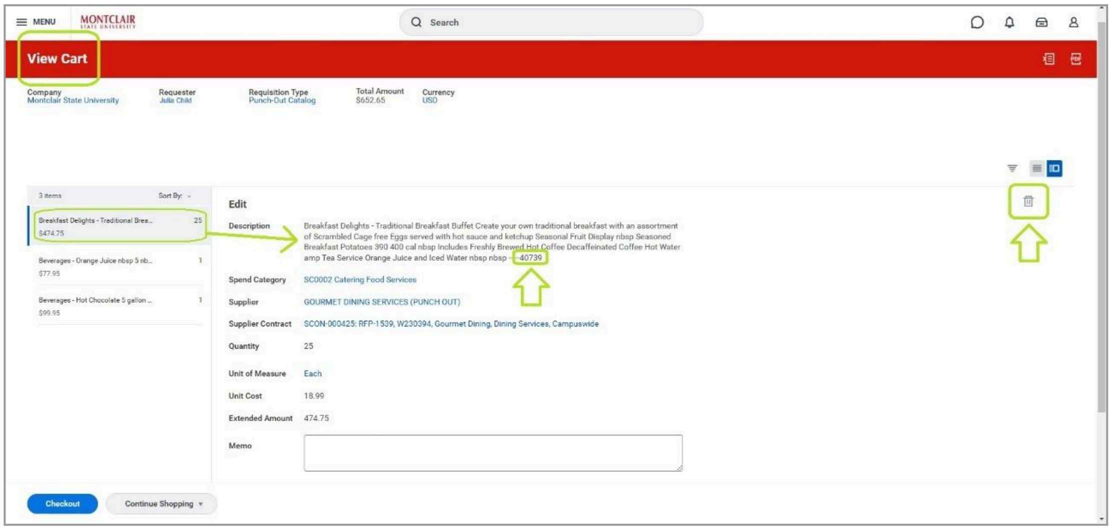
3) Refer to the **Procurement Lifecycle Job Aid** table of contents to view further instructions on how to complete the **Checkout Process for a Requisition**.

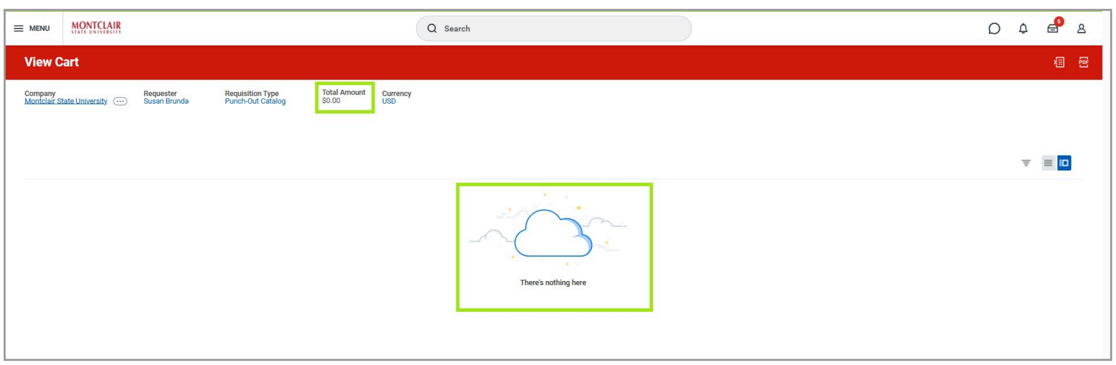
To view the Workday Procurement Lifecycle job aid in Workday, click:
Menu > **Workday Resources** > **Procurement tab**.

IV. Cancel out of View Cart BEFORE Checking Out

When you are on the **View Cart** page in Workday, if you determine that you are **NOT ready to Checkout** to submit your requisition, follow the below steps.

1) **EMPTY your cart** by clicking the gray trash can **on each line**.





2) When your cart is **EMPTY** (the total amount is $0.00), you can now go back into the punch-out via selecting the button for **Continue Shopping > Connect to Supplier Website**, **OR**, you can close out of Workday completely, **OR** you can click the Montclair logo at the top of the page to return to your Workday homepage to do other Workday processes.

3) If you have gone back into the Punch-out to change your catering order, after you confirm that the desired changes have been made, follow instructions in **Section V. Exporting Saved E-Cater Quotes to Workday to Submit a Requisition.**

V. Exporting Saved E-Cater Quotes to Workday to Submit a Requisition

Follow steps in this section to **access a saved (previously created) catering order# in E-Cater** to export it into Workday to complete the Catering Punch-Out requisition process.

1) **Review your budget** to ensure that you have enough funds available for the requisition to pass budget check. You must have funds in Budget Pool - General Operating 60510: Catering Services and Fees. If your requisition fails budget check it will not get submitted and no PO will be generated.

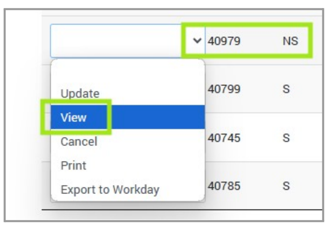
2) Follow steps starting from **Section I** for **Create a Catering Punch-Out Requisition**.

3) When the Gourmet Dining E-Cater Punch-Out launches, you will be at the **My Orders** screen.

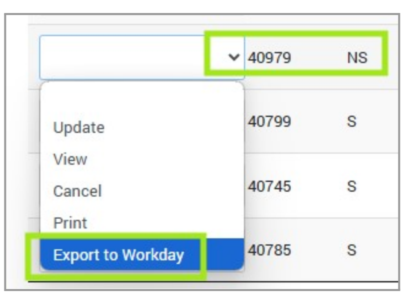
Optional**:** ***To make changes to*** *your E-Cater order before exporting it, click the drop down arrow next to the order# and click* ***View****.*

a) to ***ADD*** *menu items, click the* ***Menu*** *link. Follow steps in* ***Section II*** *step* ***4)****.*

b) to ***DELETE*** *menu items, click the red minus sign "**-**" on the line for the item you wish to delete. Follow steps in* ***Section II*** *step* ***5)****.*



4) To export your catering order to Workday to Checkout and complete your requisition, click the arrow for the drop-down menu next to your catering order and select **Export to Workday**. (In the event that you do not have "Export to Workday", try instead clicking View > Checkout > Submit quote/invoice to Workday.)



5) Follow instructions in **Section III** of this job aid to **View Cart and Checkout to Submit Requisition.**

IMPORTANT! A catering requisition should only have ONE (1) E-Cater order# on it. DO NOT "continue shopping" to add another E-Cater order to your requisition.

VI. Requested For Orders

Use instructions in this section if **YOU, the Workday requisitioner**, have been notified by Catering that you need to export an E-Cater order that someone else (including Catering) created for you. You will only be able to export Requested For Orders to Workday if your @montclair.edu email address appears in the "**Requisitioner's Email**" field on the Event Information page of the order. (The Requisitioner's Email field is visible at the top of a catering order summary.)

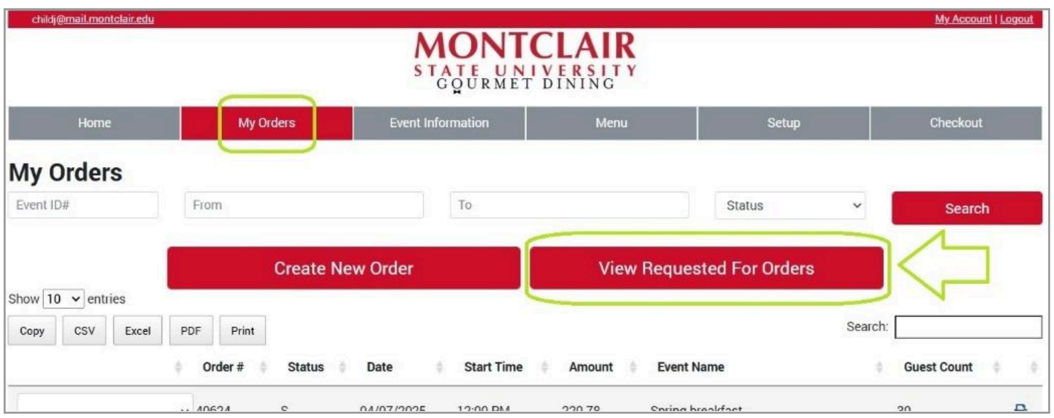
To access a Requested For Order to export to Workday:

1) Follow steps in **Section I** for **Create a Catering Punch-Out Requisition.**

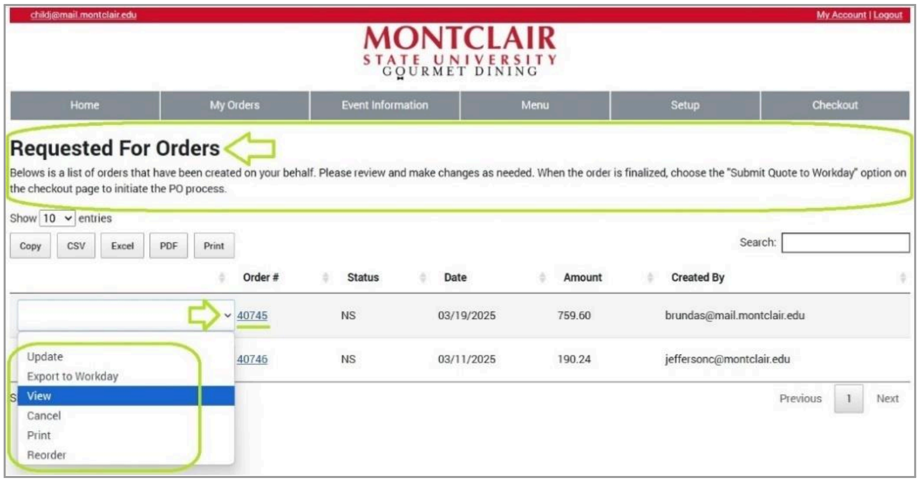
2) When the **Gourmet Dining E-Cater Punch-Out** launches, you will be at the **My Orders** screen.

*****You are now working within the Gourmet Dining E-Cater Punch-Out Catalog.** If you have questions about a Requested For Order, please contact Catering Services at 973-655-6914.***

3) Click the red box for **View Requested For Orders**.



Your **Requested For Orders** page will appear. Read the instructional text on your screen.



4) Click the drop-down arrow next to the desired order number and make a selection.

If you select:

- **View**, you can make changes to the order using instructions in **Section II,** step **4) a.** of this job aid.

OR…

If you select:

- **Export to Workday**, you are proceeding with View Cart and Checkout to Submit Requisition. (In the event that you do not have "Export to Workday", try instead clicking View > Checkout > Submit quote/invoice to Workday.) After you are brought back into Workday, refer to instructions in **Section III** in this job aid for **View Cart in Workday and Checkout to Submit Requisition**.

  IMPORTANT! A catering requisition should only have ONE (1) E-Cater order# on it. DO NOT "continue shopping" to add another E-Cater order to your requisition.

VII. Change, Cancel or RE-Export a Catering Order

Please note: Workday change orders are **NOT** allowed on Punch-Out PO's.

Scenario 1:

It is prior to your event date and you need to **ADD** or **REDUCE** menu items, guest count or services for a catering order that **has a PO#.** Complete the below 3 steps **as immediately as possible** and **BEFORE** your event date:

1) Contact Catering Services to: **a)** Advise them that the original PO# is being closed in Workday and should be canceled on their side. **b)** Request the desired changes to your order. Catering will then revise your original catering order# within the E-Cater system. **c)** Confirm with catering that the updated catering order is "approved" in e-cater and ready to be exported again.

2) Follow instructions within the Procurement Lifecycle job aid to **CLOSE** the original **PO#** in Workday (you are closing the PO, NOT the requisition). This will release the funds back into your budget.

3) Follow instructions in **Section V Exporting Saved E-Cater Quotes to Workday to Submit a Requisition,** to re-export the same order# (that now reflects your changes) to Workday to submit a new requisition.

Scenario 2:

Your event date has passed, and a PO# is issued (but NOT invoiced*****) **AND** Catering contacts you to RE-export your order because they made changes to your catering order that will result in a higher invoice amount, **as soon as possible**:

****DO NOT** use these instructions if your PO has already been e-invoiced. To view invoices on your PO, run the Requisition Lifecycle report for the PO. When the report appears, scroll to the right to view any invoices. If you have an invoice but it is unpaid, your invoice may be in match exception. Refer to section X of this job aid.*

1) Follow instructions within the Procurement Lifecycle job aid to **CLOSE** the original **PO#** in Workday (you are closing the PO, NOT the requisition). This will release the funds back into your budget.

2) Follow instructions in **Section V Exporting Saved E-Cater Quotes to Workday to Submit a Requisition,** to RE-export the same order# (that now reflects your changes) to Workday to submit a new requisition.

(continued on next page)

Scenario 3:

If you need to CANCEL a catering order (the event will not occur) for a **requisition (RQ)** that is **in progress/NOT approved** and **NO** PO# is issued:

1) Contact Catering Services by phone to 973-655-6914 or by email to msucatering@montclair.edu to cancel the catering order#.

2) **Cancel** the in progress requisition in Workday. Go to **My Requisitions**, locate your RQ#. Click the related actions button next to the RQ# and select Cancel > OK > Done. **Note:** If your RQ is "approved" or "completed", you cannot cancel it and must use steps in Scenario 4 below.

Scenario 4:

If you need to: CANCEL a catering order (the event will not occur) that **has a PO#**:

1) Contact Catering Services by phone to 973-655-6914 or by email to msucatering@montclair.edu to cancel the catering order#.

2) After Catering confirms cancellation of the E-Cater order#, you must **CLOSE the PO in Workday** to release the funds back into your budget.

VIII. Create Receipt on Purchase Orders for Completed Events

After your event has taken place and catering services have been provided, requisitioners must **Create Receipt** on the PO in Workday **as immediately as possible** to ensure prompt payment to Gourmet Dining.

Refer to the **Procurement Lifecycle Job Aid** table of contents for instructions on how to **Create Receipt** on a PO.

To view the Procurement Lifecycle job aid in Workday, click:
Menu > **Workday Resources** > **Procurement tab**.

IX. Catering Invoices

DO NOT email Gourmet Dining invoices anywhere. (Punch-Outs have e-invoicing and invoices are transmitted electronically directly into Workday.)

X. Match Exceptions

If your PO has an invoice that is in match exception it will **NOT** get paid! You must take action to clear any match exceptions.

Match exceptions occur if the create receipt process is not done (or if the receipt is a draft), **OR** if there is a pricing discrepancy between the invoice and the PO. Invoices can have more than one match exception. They must ALL be cleared for the invoice to be paid.

To view your match exceptions, in Workday select:

Menu > Cost Center Finance & Budget > Requisitioning > Supplier Invoices in Exception

To clear match exceptions that are due to:

- **missing receipts:** Complete the Create Receipt process on the PO. Make sure you have added an attachment and the receipt is submitted (not a draft). For more information, please refer to instructions in section VIII of this job aid.

- **pricing discrepancy:** Review each supplier invoice on the PO that is listed as being in match exception. **If you agree to the price discrepancy and want to pay the invoiced amount:** send an email to **updatevoucher@montclair.edu** to advise A/P that you wish to "override the match exception for PO-00000xxxxx - SI-0000xxxxxx and would like to pay the invoice". Please send a separate email for each PO/SI.

ADDITIONAL SUPPORT

If you have questions or need assistance with the **Gourmet Dining E-Cater website or regarding catering menus, orders, services, quotes or invoices,** contact Catering Services by phone to 973-655-6914 or msucatering@montclair.edu

Please visit the **Catering Services** page and the **Dining Services Forms, Policies, and Guidelines** page for detailed information available to members of the campus community related to food services and catering.

Workday Customer Care

Questions about the **Workday processes described in this job aid** can be sent to WCCsupport@montclair.edu or call 973-655-5000, Option 1.