E-PROCUREMENT
SU Express

Training Exercise Manual

Purchasing Services
Winston Salem State University
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E-Procurement

What is E-Procurement?

It is a Business to Business (B2B) web based system that will enhance our current requisitioning process.

- 75% E-Procurement processes
- 25% Businesses that are not set-up through E-Procurement

How does it work?

The web based shopping cart method is used to process orders.

What are some of the benefits?

- Point and click method used which will save time and cost
- Multiple vendors on one requisition done thru shopping cart process.
- Timeline of activity provided throughout entire process
- Increased discounts provided to WSSU due to other state schools/agencies utilizing Sci-Quest E-Procurement system.
Logging into E-Procurement

https://usertest.scquest.com/apps/Router/SAMLAuth/WinstonSalemState

(NOTE: TEST URL LINK)

- Input User name example: valentineje (lowercase)
- Password (Network Password)
- Sign In
1. **Always check FGIBAVL in Banner before inputting a requisition**
2. Always clear up your “Action Items”. See below on Home Page

To return to your home screen, you can click the shopping cart, or the house.
Three categories used in SU Express

Showcased Vendors

Multiple Supplier catalogs are combined into one internal virtual catalog. This is very handy for searching across multiple catalogs at once.

Punch-out

Individual external supplier catalogs. Each Punch-out site will have a unique layout and function differently for specified categories.

Non-Catalog

An order form designed to accommodate purchases for products not available through hosted or punch-out catalogs.
Showcased Vendors

When items are searched, all items throughout the catalog which meet criteria will appear.
Exercise 1 - Showcased Vendors

1. Under Showcased Vendors
   - Click Grainger

2. A box will appear
   - Inside the box type ............ hammer
   - Click the magnifying glass

The word hammer returned ___________ results
3. Under “Add Keywords”
   - Type….wood
   - Click GO

   {Search has narrowed down the results. Note: See by category}

4. Click item 1 by clicking “Add to cart” (highlighted in blue)

   Note: Under add favorite\compare, see new added line - 1 item(s) added, view cart
5. Click ............ 1 item(s) added, view cart

6. Name this Cart: Currently displays today's date and your user name. Rename cart so that you can later identify this requisition. For example: Prof. Jones lab supplies - Grainger

7. Click Update

8. After cart is named, click “Update” then click “Proceed to Checkout”
9. The below highlighted message bar will inform you of the required field(s) that must be addressed. Note: Message required fields are subject to change for our exercises.

10. Click highlighted “Required field” under fund code. For class exercise, Input fund listed on handout. Click on account, Note: Account code 929000 is for class purposes only.

Note: Please always use correct account code that coincide with description of what you are ordering in Production Environment.
11. Click “recalculate/validate values” and save

12. Note: Ship to may appear 1st time until you have been set up.

   Raise your hand and we will assist. Note: You will not have this problem in production; we will set up your ship to for you.

13. Internal and External Notes and attachments

   • Internal Notes and attachments are messages and attachment to share with your Purchasing Buyer

   • External Notes and attachments are for the vendor
14. Click “Internal Notes and Attachments”

Click External Notes and Attachments

15. Internal & External note: Click edit and type your note to Buyer. Click Save

Internal & External attachment: Click add attachment. Type a file name, click file and import file from desktop, stick or drives
16. Click Final Review

Note: Final review will display entire order – review order to make sure no changes are required.

NOTE: For your file, audit purposes, approval, etc, please PRINT requisition before you click PLACE ORDER.

17. Click Place Order
CONGRATULATIONS, you have successfully placed your first order!!!!!!!!!
Comparison Method of **Showcased Vendors**

1. Beside Shop everything input Flashlight and click **Go**

2. Under Add Keywords, type ………C Yellow and click **Go**

3. Note: Listed under “filter results” by supplier, you may have various vendors to compare prices

4. Click **Add to Cart** for any of the flashlights and see if you can complete requisition on your own.
   Note: If not, assistance is available.
Punch-Out Catalog

Takes you to specific external requested vendor and their catalog information
Exercise 2 – Punch-Out Catalog

1. Under Punch-Out, click “Camcor, Inc”. (you are taken directly to the vendor catalog)

2. Under Digital Cameras – click “Camcorders”

Please note: This is a PunchOut request and each vendor setup will be different.
FYI – if the wrong vendor is clicked, you can cancel and return to home page.
3. Click on any camcorder
4. Click “Add to Cart” and review order
5. Click “check out”
6. You will see “Punchout Order Review” - Click “Submit Order”
7. Don’t forget to edit Name of Cart and click update – click “ Proceed to Checkout”

**NOTE:** CHECKOUT PROCEDURES ARE THE SAME FOR ANY OF THE THREE CATALOG CHOICES
8. Click highlighted “**Required field**” input appropriate information

**Note:** Use fund and account on provided handout

9. After “**Required field**” information is inputted, click “recalculate and save”
10. Insert internal/external notes and attachments, click Final Review

**Note:** Final Review will display entire order.

**NOTE:** For audit purposes, approval etc, please PRINT requisition before you click PLACE ORDER.
11. Click **Place Order**
Non-Catalog Items

It is recommended that shoppers purchase from hosted or punch-out catalogs. However there are times when items are not available from either source. This is when Non-catalog items are chosen.

10 function pocket tool

No items at this time!
Exercise 3 – Non Catalog

1. Click on Non-Catalog item (located below Shop Search Box)

   ![Image of Shop Search Box]

   *The University Budget Office must approve all expenditures from state funds. Orders will not be processed without proper approvals.*

2. Type Carpet Central Inc.
   Note: If vendor is not listed, contact Purchasing Services.

   ![Image of Non-Catalog Item]

   *The University Budget Office must approve all expenditures. Orders will not be processed without proper approvals.*
3. Fill in all required fields:

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Carpet for Red Room in Thompson Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog No</td>
<td>C456789</td>
</tr>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
<tr>
<td>Price Estimate</td>
<td>50.00</td>
</tr>
<tr>
<td>Packaging</td>
<td>yd</td>
</tr>
</tbody>
</table>

4. Click **search light** next to “commodity code”
5. Beside Description contains – type….. Carpet

6. Click “search”

7. Select - Carpeting

If you know that the product is recycled, green, hazardous material, etc., mark it by placing a check mark in the checkbox next to appropriate product.

If ordering Multiple items, **click Save and Add Another**. This will allow you to run reports according to the types of purchase.

Note: If ordering one item, **click Save and Close**
8. Click the link that shows the cart and dollar value

9. A popup window will appear, click “view my cart”
10. Name this cart and click “update”

11. Click Proceed to Checkout

12. Input Fund and Account Code as in previous exercises

13. Recalculate and Save

15. Click “Final Review”
Note: Final Review will display entire order

NOTE: For audit purposes, approval etc, please PRINT requisition before you click PLACE ORDER.
16. Click **Place Order**
SPLITTING ACCOUNT CODES

For this exercise, please go to the VWR catalog and search for “Divider Tote Box”. Place two (2) items in your cart. Click .......... 1 item(s) added, view cart

1. After clicking - Proceed to Checkout

2. Click Required Field and input Account Code

3. Click “recalculate” and save
4. If split is required per line, stroll to line item that needs to be adjusted, Click box beside Ext. Price and click edit.

5. Click “add split”
6. Click drop down boxes beside add split: Choose method
   - % of Price
   - % of Quantity
   - Amount of Price

7. Input appropriate Account Codes and split method

8. Click “recalculate” and “save”
9. Notice how the line looks being split between two account codes

Note: If you have only one item being split, perform the split at Header record under Accounting Codes
Simple Search

1. Click on the “document search” tab.

2. Click “Search Documents” from the drop down menu.

3. Method 1
   - Click All Documents /Requisition and/or Purchase Order from drop down

   Method 2
   - Input other data such as document number, user id, vendor name etc.

4. Input “date range”, if applicable.
5. All results that match the criteria will return.

6. To “Refine Search Results” change fields on the left side of the screen.

Advance Search

1. Click on the “advanced search” link.

2. Click the “document type”.

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3. Fill in the necessary fields
4. Click
5. All results that match the criteria will return.
6. To “Refine Search Results” changes fields on the left side of the screen.
Chemical Structure Search

1. Click on the “chemicals” link on the home page.

![Chemical Structure Search](image)

2. Using the structures to the right drag and drop them on the blank page to create a structure to search for. Click “Search”.

![Chemical Structure Search](image)

3. The search returns all elements that contain the structure.

4. Check the box beside all the elements you wish to perform a catalog search with. Click “search catalog” next to one of the selected elements.

![Chemical Structure Search](image)
5. The search will return all items available within the hosted catalogs.
Copy to Cart

1. Do a document search and bring up the requisition for VWR International Inc.

2. Under available actions dropdown, select “copy to new cart”, click go.


4. Complete your requisition. If you have any problems, please ask for assistance.
NOTES:

1. REVIEW requisition tabs
   - PR Approvals
   - PO Review
   - Comments
   - Attachments
   - History

2. SU Express production cite

REMINDERS:

- Always check your budget prior to submitting your requisition
- Always check and make sure you have selected the correct address for the vendor
- Always check and make sure the vendor has a fax number, if there is no fax, make sure Purchasing has updated the vendor file with an email address for PO distribution
- When you have more than “1” line item, do not split at the header, split at the line
- Always attach your quotes internally and externally
- Most importantly, if your purchase is under $2500 and the vendor accepts the p-card, please use it.