

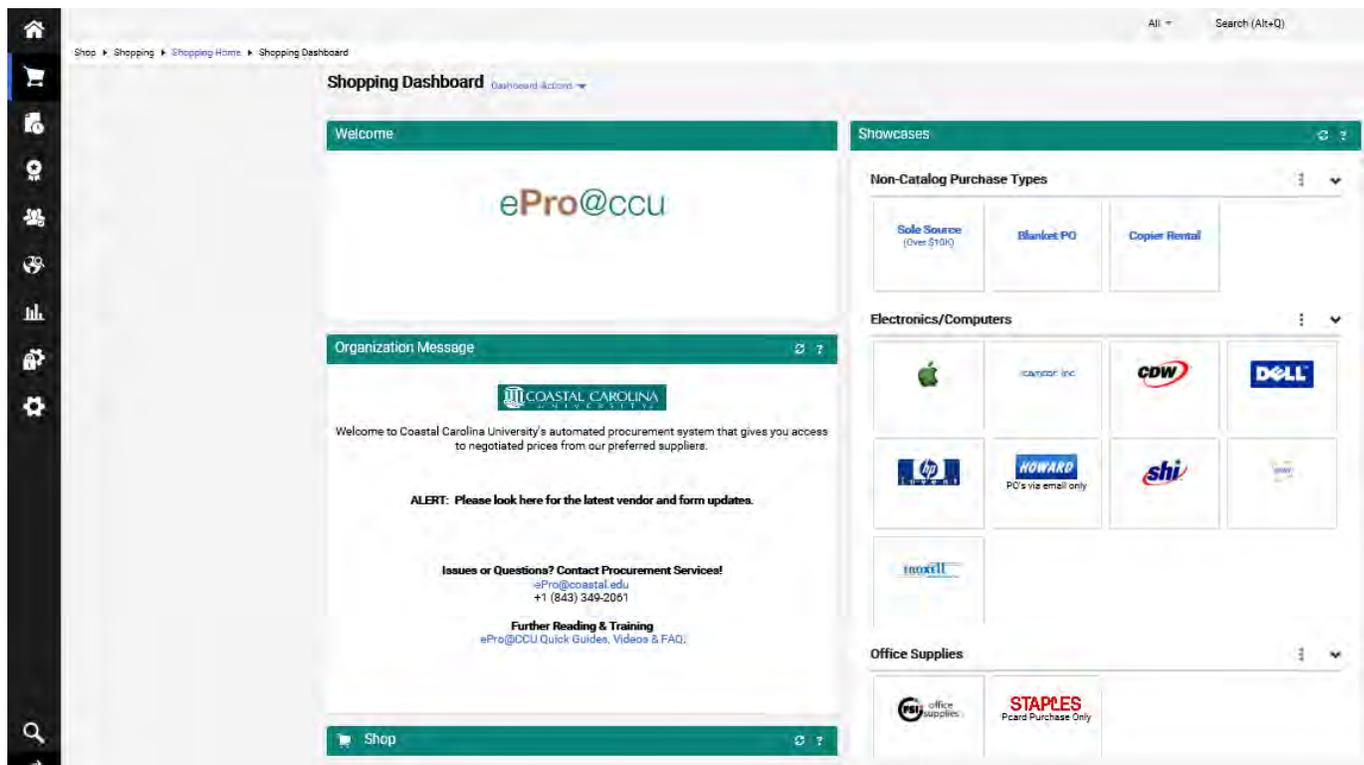


OBJECTIVES

In this document, we will familiarize Shoppers and Requestors with how to shop for and add products to a shopping cart. We will also discuss the responsibilities of the Requestor for reviewing the requisition and then placing the order which submits the cart into the workflow where it becomes a requisition.

SECTION1: SHOPPING OPTIONS

Navigate to the “ePro@ccu” website using your CCU username and password to login. Shoppers will be taken to the “ePro@ccu” landing page.



There are two (2) main methods for searching and selecting products for purchase: PunchOut Catalogs and Non-Catalog Item / Order.

PunchOut Catalogs – Punch Out catalogs are integrated external links from “ePro@ccu” to a supplier’s web-based catalog. The user searches and selects the products from the supplier’s website and adds those items to a supplier site shopping cart. Many suppliers also have quote retrieval functionality as well. The cart is then returned to the “ePro@ccu” shopping cart then submitted through the standard requisition process. Payment method utilizing Pcards are permitted unless indicated otherwise on the punchout sticker.

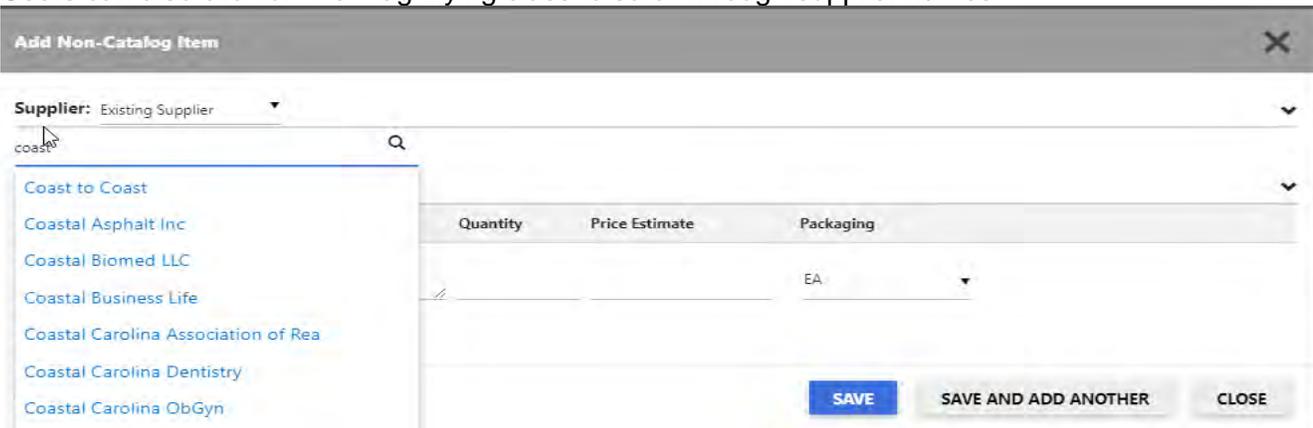
Non-Catalog Item – Non-Catalog Item order allow end users the ability to order from university vetted suppliers who accept invoiced purchase orders. This a free-form format which allows flexibility in the description field obtained from quotes or emails. Carts can consist of one (1) or more line items. Purchase Orders utilizing Pcards are not permitted. However, End Users may use the Non-Catalog Item form for the Approval workflow only by utilizing the “Intended Pcard Purchase by Department” field. These orders are then completed outside of ePro.

SECTION 2: LET’S GO SHOPPING

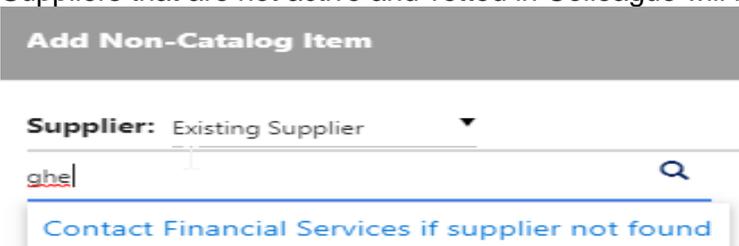
Always start with a new cart. Reference the “Creating Multiple Draft Carts” handout for assistance. For **Non-Catalog Item** searches, navigate to the Shop page of the “ePro@ccu” website, Shopping section, Non-Catalog Item section.



In the Select Supplier field, enter the name of the supplier to be used. The system will begin showing active, vetted suppliers matching the criteria listed. Users can also click on the magnifying glass to scroll through supplier names.



Suppliers that are not active and vetted in Colleague will return the following message.



Contact Casey Keck for verification and Jennifer Watkins (6612) to assist with supplier setup. You will not be able to create a cart without an active supplier.

Please select the drop-down arrow on the far right of the Distribution Methods area. The information shown is what is listed in the supplier’s profile. This is a required field.

Review and make any updates necessary for this particular order. If the supplier's profile needs to be updated, please contact Casey Keck ext 2061.

Product Description, Quantity and Price Estimated are required fields.
Carts can contain one (1) or several line items.

Supplier Name	Product Description	Catalog No.	Size—Packaging	Unit Price	Quantity
Coastal Asphalt Inc	Free form format	complete if able	EA	2.99 USD	10
Coastal Asphalt Inc	Free form format - line #2		EA	2.99 USD	1

Supplier: Existing Supplier

Coastal Asphalt Inc

Fulfillment Address

Distribution Methods

The system will distribute purchase orders using the method(s) indicated below:

Fax

Email (HTML Body) ckeck@coastal.edu

Catalog No.	Product Description	Quantity	Price Estimate	Packaging
				EA

★ Required fields

SAVE SAVE AND ADD ANOTHER CLOSE

Once all line items have been created, select SAVE and proceed to the Cart area.

Reminder: Carts should only consist of one Supplier. Please refer to the [Multiple Carts](#) handouts for detailed instructions.

Locate the saved cart via 2 paths:
Dashboard – Top Right – Cart icon

All Search (Alt+Q) 35.52 USD

My Cart (2020-04-07 User - Test Cart creation)

Free form format - line #2
Quantity: 1
Price: 2.99 USD

Free form format
Quantity: 10
Price: 29.90 USD

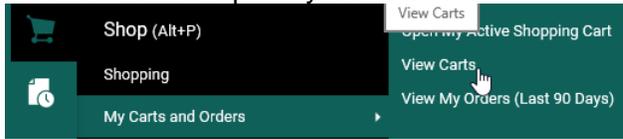
View My Cart
Checkout

35.52 USD

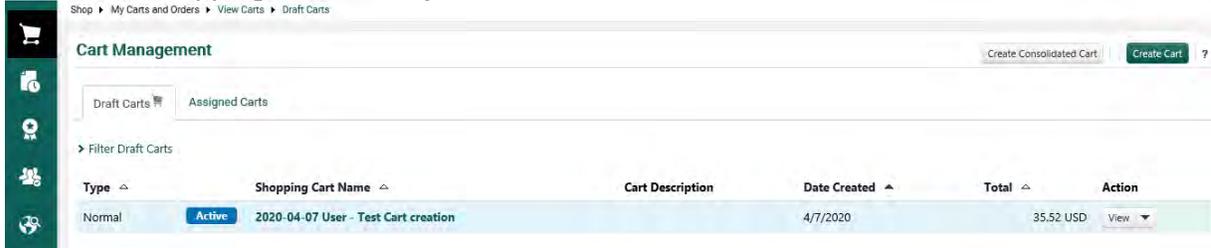
Click on cart to expand options – select “Checkout” to add important information to the cart

Or

Dashboard – Shop – My Carts and Orders – View My Carts

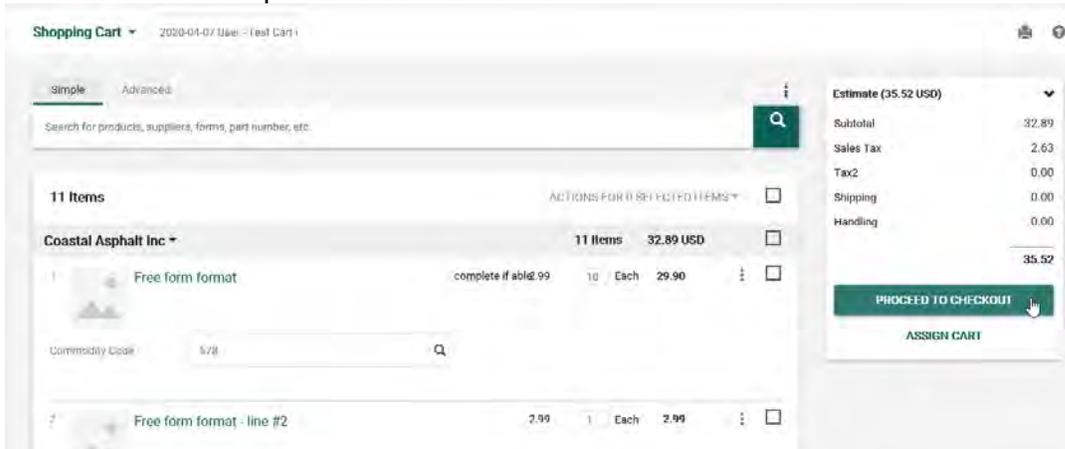


Select the Shopping Cart Name you wish to work on



Proceed to Checkout:

This allows users to add / update fields vital to the REQ.



Each section will have an Edit option (pencil icon ).
Required fields are discussed below.

General: Cart Name (date – user’s name – supplier name)

Description regarding the nature of the REQ

Accounting Date – leave blank unless creating a cart for a new fiscal year.

Does this involve the purchase of IT hardware or software? – a checkmark manually routes for ITS Approval. Commodity and Object code also flag for ITS Approval

If this is a software purchase, does it include credit card processing features? – indicating “Yes” will trigger the required “Financial Services Review” approval step to occur.

Intended Pcard Purchase by Department? – Non-Catalog Items orders will Reject for ordering outside of ePro. Punchouts will Return for Pcard info entry and processing within ePro.

Is your purchase an allowed Pcard (or Travel Card) purchase and do you have sufficient card limits? - Selection of "Yes" indicates that the card holder has reviewed purchasing guidelines as well as if they have sufficient funds to make this purchase. Selection of “N/A” can be used for invoiced intended purchase orders.

Shipping: Purchase Order should be sent to Central Receiving

Package labels should have the following format

Atlantic Hall Purchasing and Receiving

ATTN: Employee Full Name / Building Code / Office # ____

642 Century Circle

Conway, SC 29526

Following exceptions.

1: Hazardous material

Shipping label:

Science Annex 2

ATTN: Employee Full Name / Room 301

107 Chanticleer Drive E

Conway, SC 29526

2: Desktop deliveries from FSI and Staples

Shipping label:

Building name

ATTN: Employee Full Name / Office # ____

Physical address

Conway, SC 29526

3: Items that are too large to be delivered here to Central Receiving needs to be delivered and installed at its final resting place.

After the item is delivered and installed, it is the end users responsibility to contact Central Receiving within 3 business days, so that we can get the item properly tagged.

Account Codes: Header Level

**Fund-Activity-Object codes are required.

REQ's created from Punchouts and using a P-card still require a GL# to be listed in this section.

Project ID is not required and is verified during the ERP (Colleague) validation process

Funds can be split at the header-level (here) or at the line-level (product line area)

Internal Notes & Attachments: Header Level

Internal notes populate the Comment field in Colleague – **only** Procurement and Accounts Payable should use this field.

**Internal attachments should be used for any and all supporting documentation (ex: COI, quote, contracts, etc..)

External Notes & Attachments: Header Level

**Note to all Suppliers – contains important information that Central Receiving or Delivery Personnel may need.

End User / Department Contact information required.

Also useful for marking who the REQ was for / what the

purpose of the REQ was / area to add additional details, expand upon request.

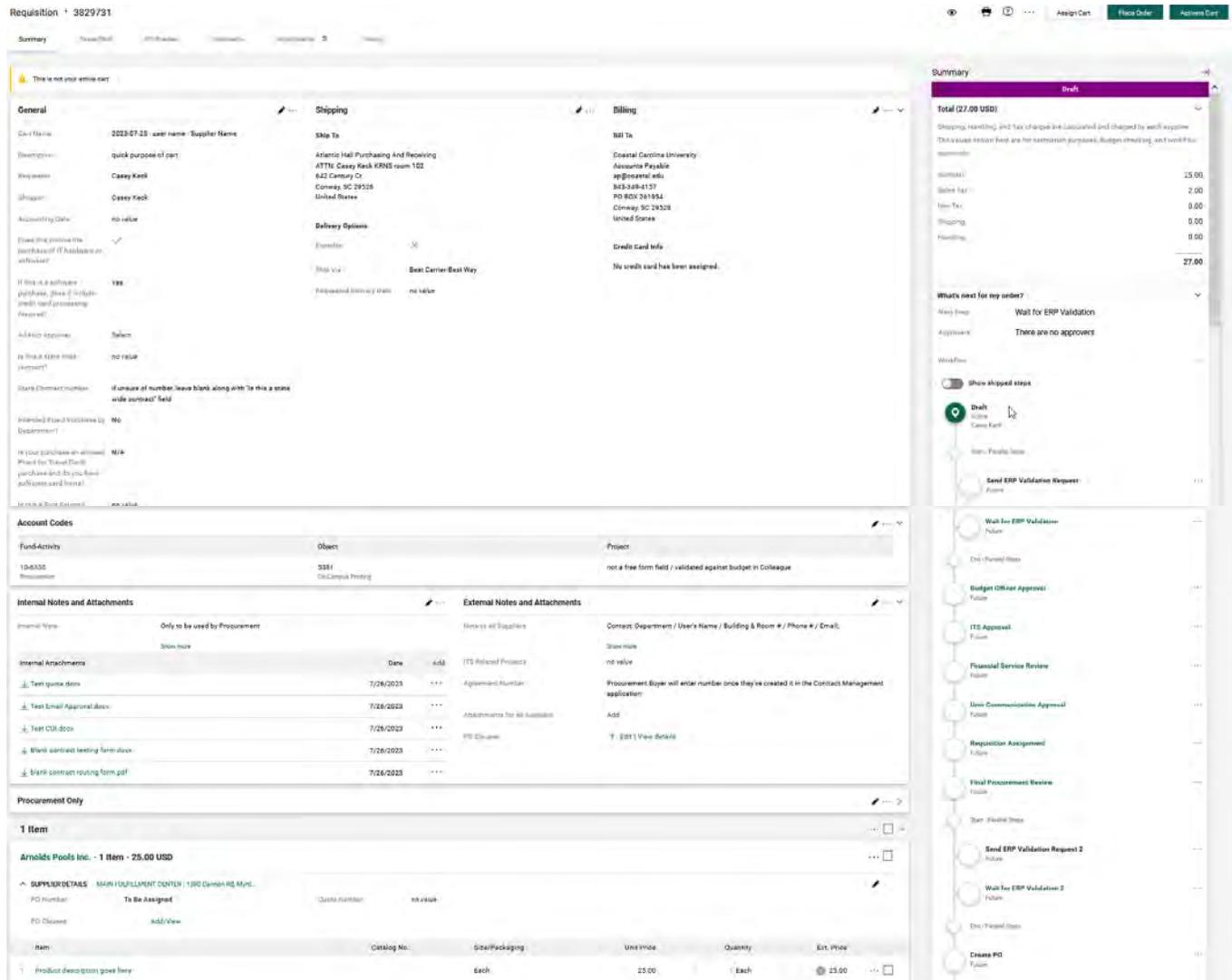
Details print on the PO

Supplier line: add quote number in this field (if applicable)

Line Level: each line item has the ability to remove tax. This is accomplished by unchecking the box next to TAXABLE

Save

Once all information that can be included has been done and any **RED** error message have been resolved – depending on the user’s role or department process - either the “Assign Cart” (Shopper without access to the GL account used) or “Place Order” (Requester with access to the GL account used) option appears.



Assign to Cart:

A user given the Shopper role will need to assign the cart to a Requester who has access in Colleague to the specific GL Fund –Activity-Object codes listed on the Cart.

Assignees can either be saved as a Profile Value or a Search can be performed and the user selected.

Field of Note to Assignee is required.

Departments that require specific end users to review and sign off on REQ’s that are not part of the ePro@ccu workflows can utilize the Assign feature to incorporate these additional steps. A key requirement is that the cart is always submitted by a user who has budget viewing access to the GL accounts being used in Colleague (ePro role = Requester).

Cart Assigned to you:

An email will notify you that a cart has been assigned to you.

Log into ePro@ccu

Navigate to the following - Dashboard – Shop – My Carts and Orders – View My Carts – Assigned Carts tab



Click on Shopping Cart Name to open it
Review and update as needed

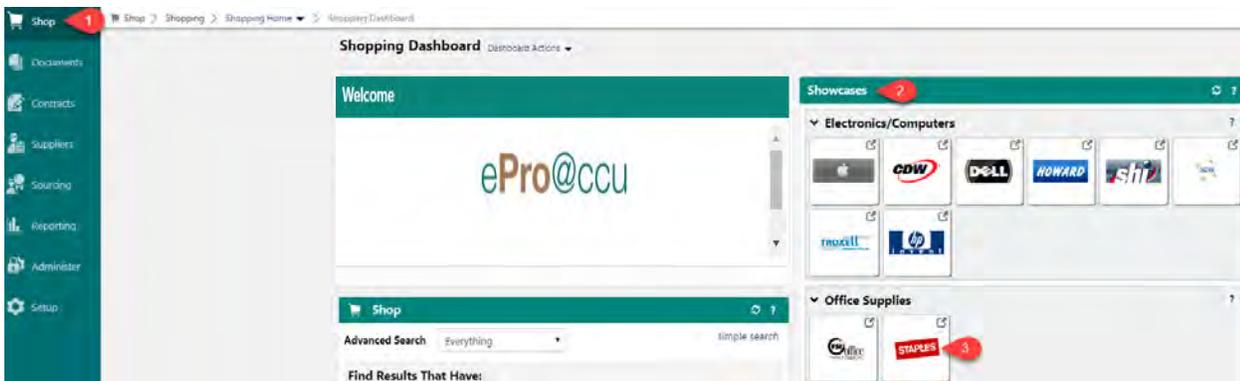
Place Order:

This step **must** be performed by a user who has budget viewing access in Colleague to the GL fund-activity-object codes listed on the Cart.

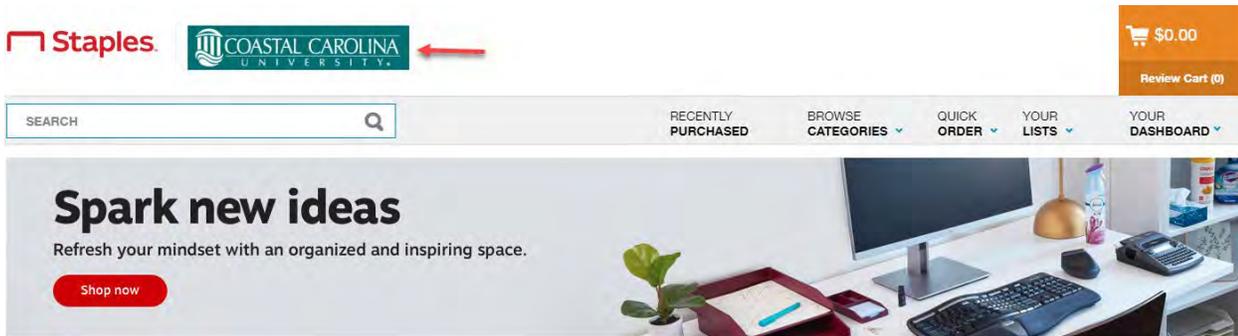
Next – please refer to Section 3: Submitting a Shopping Cart for Approval

For **Punchout Catalog** shopping, navigate to the Showcases section of the **Shop** page. Punchout Catalogs are partitions of the supplier’s public website, containing customer specific products, content and pricing. Each Supplier maintains their own website and determines what functionality is available. Familiarize yourself with the “Pcard Payment Method and ePro@ccu” handout before working with Amazon.

To access the supplier site, click on the supplier logo.



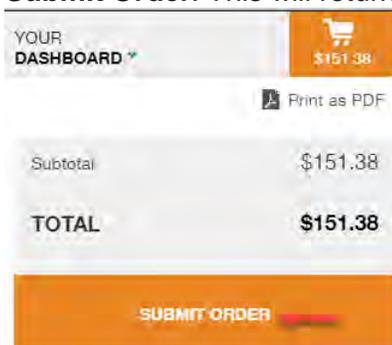
A new webpage will open, taking you to the “**ePro@ccu**” version of the Staples website. Allow pop-up blocker access to the supplier’s site.



Using the website search feature, locate the items to be purchased and add them to the shopping cart. A tally of your shopping cart will be kept by the website.

Some suppliers allow ITS to create and save quotes as well. Check with Procurement and ITS for details.

When finished shopping, navigate to the supplier shopping cart, review and update as needed and click **Submit Order**. This will return the items back to the “ePro@ccu” website and shopping cart.



The items will be loaded to the current open shopping cart within the “ePro@ccu” website and will be updated automatically with the appropriate Commodity Code.

Locate cart and “Proceed to Checkout” (refer to instructions listed in the non-catalog tem order portion)

SECTION 3: SUBMITTING A SHOPPING CART FOR APPROVAL

Place Order:

This step **must** be performed by a user who has budget viewing access in Colleague to the GL fund-activity-object codes listed on the cart.

Departments need to develop a clear process for each of their users so that all approvals are incorporated based on their inter-departmental requirements

Requestor should review the workflow to understand who all is on the approval path.

Open the drop down section titled “What’s next for my order?”

Summary →

What's next for my order? ∨

Next Step Wait for ERP Validation

Approvers There are no approvers

Workflow ⋮

Show skipped steps

Draft
Active
Procurement Syst. Admini Keck
On behalf of: Casey Keck

Start - Parallel Steps

Send ERP Validation Request
Future ⋮

Wait for ERP Validation
Future ⋮

End - Parallel Steps

Budget Officer Approval
Future ⋮

ITS Approval
Future ⋮

Financial Service Review
Future ⋮

Univ Communication Approval
Future ⋮

Requisition Assignment
Future ⋮

Final Procurement Review
Future ⋮

Start - Parallel Steps

Send ERP Validation Request 2
Future ⋮

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This is a view-only section of the REQ's workflow.

Open each step to see who is will notified for completion. Some steps our systems generated and completed, other steps have one (1) or more approvers in that role.

Email notification will be sent to the Shopper and Requester when a request has been submitted, when it has been approved, when the Purchase Order Number has been created and when the PO is delivered to the vendor.

If a step contains multiple users then all of them will be notified of the task. Completion of the task is on a first-come basis. The Approver handouts contain detailed information regarding this process.

Requisition ▾ : 2809102

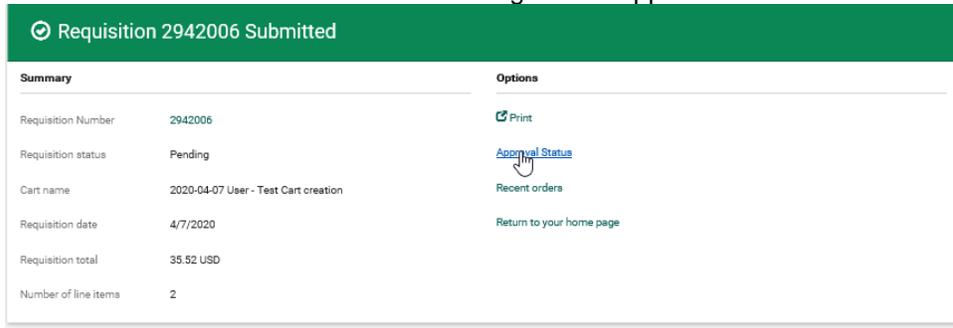
Summary Taxes/S&H Comments **1** History

The **History** function of the REQ will allow users to view what steps have been completed, by whom, what time, any comments associated and any error messages.

Please note that comments cannot be deleted.

Approval Status:

Once "Place Order" has been activated the following screen appears



Click on the "Approval Status" link as this show how the initial validation process is proceeding.

Return to Requisitioner emails / notifications:

Once a cart has been submitted into the workflow, the ERP (Colleague) verifies several pieces of information.

- 1) Is the user that submitted the cart a valid user in Colleague
- 2) Does the user have access to the GL # in Colleague
- 3) Is the Supplier valid and Active in Colleague
- 4) Is the Fun-Activity and Object code combination active in Colleague for the indicated fiscal year
- 5) Is the Project ID information valid with the Fund-Activity listed (if applicable)

If any one of options are not true then the ERP Validation fails and the cart is returned.

The Shopper and Requestor receive an email and notification that the cart failed.

The email contains the reason as to the failure.

This information is also listed in the HISTORY section for reference.

Requesters can Activate the Draft (returned) Cart, update the invalid information and resubmit the cart. Please contact the ePro Administrator if assistance is required.

Please review the following handouts available on the ePro@ccu web site.

- Creating Multiple Draft Carts
- Substitute Requestors
- Change Requests
- Cart Clean Up
- Procurement to Payment