SelectSite/HigherMarkets

Requisitioner Handbook

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WELCOME

Objectives

The purpose of this handbook is to familiarize requisitioners with the SciQuest SelectSite / HigherMarkets application. We hope it will help you:

- Understand the available functionality in the SelectSite application.
- Search for and order items at the best possible price.
- Create flexible, easy-to-understand purchase requisitions and purchase orders.
- Easily manage the requisition process.

IMPORTANT:

The approval process is covered in a separate document: SelectSite Approval and Workflow Setup.

Key Points

- This handbook will show you how to perform functions in the system. It is important to note that much of the *how, when, and why the system is used* is determined by your organization's business practices. We suggest that you supplement this document with your organization's business practices, goals, and policies.
- End user topics range from registering as a new user, defining your user profile, searching for items to purchase, assigning an order to someone else, and submitting an order. As a shopper or requisitioner, you may only have permissions to perform a subset of these functions. Typically, if you cannot perform a task, it is either not available in your site (based on site setup) or is reserved for an approver or system administrator.
- The term **SelectSite** is used to describe the application in this handbook. For Higher Education customers, this term represents your HigherMarkets application. HigherMarkets and SelectSite can be used interchangeably from a product feature perspective.

Understanding the Format

A **Lesson** is created for each major functional area of the system. Within each lesson, there are three sections:

1. An overview of the goals and functions in the lesson
2. Background and conceptual information about the lesson. The concepts will help you better understand why and when you perform tasks in the system and how they relate to other parts of the system.
3. Step-by-step exercises detailing specific tasks in the system. Each exercise provides background information about the task, details about the typical user, step-by-step instructions, and in many cases, a results screen to compare your work.

What you will learn…

The document is organized according to the major functions of the SciQuest SelectSite application:

- **The Basics**- includes an overview of SelectSite and its modules, site navigation, accessing Online Help, accessing the site (login), and defining your user profile.
- **Searching for Items**- using the different types of search methods available, comparison shopping, ordering non-catalog items, and more.
- **Favorites**– includes setting up items as personal favorites, along with creating folders to manage your favorites.
- **Shopping Carts and Checkout**– including defining your requisition, populating header and line-level information, reviewing workflow processes, placing orders for other people, and more.
- **Requisition and Order History**– reviewing requisitions currently being processed, reviewing purchase requisition history, and purchase order history.

THE BASICS

Lesson 1: Overview

The SelectSite eProcurement solution is a robust, hosted, fully modular suite of applications that manages the entire purchasing process online. A **typical procurement process includes the following steps**:

The SelectSite application includes modules that address each step in the procurement process. The full suite of applications provides an end-to-end eProcurement solution. Alternatively, individual modules can be used to compliment other applications currently in use. Details of each module and add-ons are described below.

SciQuest Modules

A full list of modules available from SciQuest is provided below. The modules marked with * indicate those that are documented in this handbook.

- **Sourcing Director** – provides online electronic bidding and reverse auction functionality.
- **Contract Manager** – allows you to manage current supplier contracts and spend against those contracts.
- **Spend Director*** – provides online access to supplier content and university contracted pricing so the users can shop for and compare products and pricing
- **Requisition Manager*** – automates requisition approval processes
- **Order Manager*** – electronic purchase order delivery to supplier
- **Settlement Manager** – provides the ability to receive goods and electronic invoices.
- **Business Intelligence Reporting*** - provides detailed data for spend analysis
- **Chemical Manager** – provides management of chemicals, including container and location information
- **Supplies Manager** – provides management of supplies on site, including stockroom availability and ordering via SelectSite.

IMPORTANT:

Throughout this handbook, the term *Spend-Director only* is used to describe a limited deployment of SelectSite that is commonly purchased by organizations for integration into an ERP system. To better understand which parts of this handbook are applicable to you, please contact your administrator.

Available Sites

With each implementation of SelectSite, one or more sites will be set up specifically for your organization. The site setup is dependent on the needs of your organization, the modules implemented and integration points, and site setup defined in your Licensing agreement. In many cases, three sites will be set up for an organization. An explanation of each of these follows:

Production Site

The production site is the most important site that any organization will use. The production site is the one that is used on a day-to-day basis by users after go-live. This site contains live data and reports are based on the purchasing activity in this site. All suppliers and their data, along with customized settings should be enabled on this site. The production site is accessed through SciQuest's Production Servers, which are available 24/7, allow a large number of simultaneous users, and are extremely reliable.

Your production site is accessed from the following location:

http:// solutions.sciquest.com/<organization name>

For example: http://solutions.sciquest.com/universityABC or
http://solutions.sciquest.com/PharmaceuticalsABC

TIP:

Be very cautious when making changes directly to the production site. It is suggested that all changes be tested in a test environment prior to updates being made in the production site. Remember, there is no Undo function.

Testing Site

The Testing site (previously termed UIT - User Integration Testing) is used for a number of different purposes. This site is primarily designed as a tool for integration testing into third-party applications, data import, and data export. It is also used for initial site testing and review/verification of new functionality prior to site upgrades. Three weeks before a new release, the functionality is available to customers on their Testing site.

For customers that do not have a training site, Testing is occasionally used for informal training purposes. Testing sites are accessed through SciQuest's Test servers, which are restarted approximately twice daily (12pm and 5pm EST). **These servers are not designed for high volume testing and use**. Additionally, only a subset of supplier and supplier data is typically set up on Testing sites.

Your Testing site is accessed from the following location:

http:// usertest.sciquest.com/<organization name>

For example: http://usertest.sciquest.com/universityABC or
http://usertest.sciquest.com/PharmaceuticalsABC

Unlike Production and most Training sites, changes to Testing sites take effect relatively quickly because the servers are restarted at least twice daily. The Test servers may also be restarted in the case of an emergency, when a request has been made.

Training Site

Some customers have a training site which is used for formal end-user training. Most training sites are set up on SciQuest's production servers (the same as production sites), due to their reliability and ability to handle a high volume of activity simultaneously. Training sites typically have a subset of suppliers and supplier data set up. Training sites provide a great way to educate end-users without risking accidental "ordering" or site changes.

Most training sites are accessed from the following location:

http:// solutions.sciquest.com/<organization nameTrain>

For example: http://solutions.sciquest.com/universityABCTrain or http://solutions.sciquest.com/PharmaceuticalsABCTrain

Site Navigation

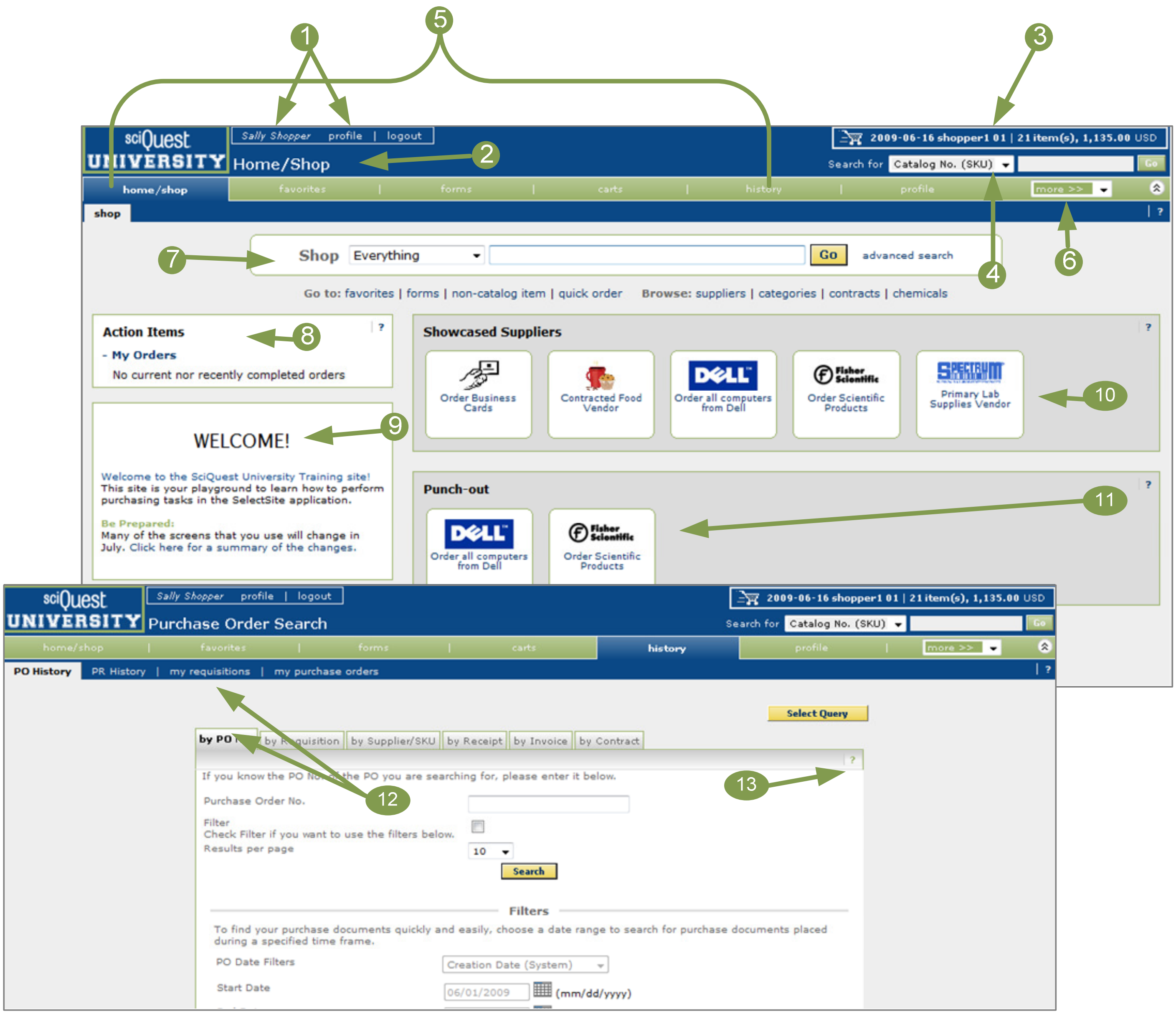
The SelectSite interface is customized on a per-user basis. The tabs, screens, and ordering of information is based on what parts of the system each user has access to, along with their personal preferences of presentation. There are a few key things to understand about site navigation and availability of system functionality:

- The navigation tabs that show up across the top of your screen are dependent on 1) the modules your organization has purchased, 2) your role, and 3) your permissions.
- SelectSite allows users to customize the order of navigation tabs on their screen so that they can access frequently-used sections of the system quickly. For example, someone who frequently reviews purchase requisitions may want the approvals tab to show up first instead of the default home tab. *Note: Allowing access to customized navigation is a permission, and may or may not be allowed at your organization.*

KEY POINT:

The screens, tabs, and field labels discussed and shown in this handbook may or may not match those used by your organization. SelectSite is very customizable; therefore you should expect differences between this generic guide and your site.

The graphic below shows various facets of SelectSite navigation. Read the descriptions following the graphic for more information about each of the navigational components:



1. **User Information**. In the upper left-hand corner of the application, information about the user is displayed within a boxed area. In this box is the user's name, a link to the user's profile (provided the user has access to their profile), and the logout link. Keep in mind that some sites remove the logout link, especially if the site is Spend Director only.

2. **Screen Title.** In the application header, just below the user information box, the title of the current screen displays. Note that the screen title reflects changes made in field management.

3. **Cart Summary.** The upper right corner displays a summary of the shopping cart. Included is the cart name (by default, this is your user name, the date, and sequential order # for the day), the number of

items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.

4. **Quick Search.** This feature allows a variety of searches to be executed from anywhere in the application. To use this feature, a search option must be selected and search criteria must be keyed in. Clicking the Go button executes the quick search and displays the results in the appropriate search results screen.

5. **Navigation tabs.** Across the top of the application are navigation tabs (the number of tabs is dependent on the licensed SelectSite modules and the permissions granted to the individual user). By clicking on a tab, the information in the screen refreshes to display the topic or function covered in that particular part of the application. The number of tabs available to each user is dependent on their permissions. The names of the navigation tabs are customizable and can be modified by a system administrator. For examples, your tab may read *Favorites* instead of *my favorites*. The order of the navigation tabs is customizable by the user (assuming the user has this permission). Each of the standard navigation tabs for a user is listed below. The navigation tabs are listed in the default order. NOTE: Additional tabs will be visible for approves, organizations using Supplies Manager, etc.

    a. **Home/Shop–** is used for shopping, and provides quick access to other key parts of the application such as favorites and forms. On the left side of the screen, the organization message and action items display.

    b. **Favorites–** is used to create and define shared and personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens.

    c. **Carts–** is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing (adding shipping info, populating custom fields, etc.).

    d. **History-** contains a repository of various documents within the application. Purchase requisitions, purchase orders, receipts, invoices, and fulfillment orders are all available for viewing, depending on the permissions granted.

    e. **Settlement-** provides access to system receipts and invoices along with the ability to create new receipts and invoices, given the proper permissions.

    f. **Profile–** is used to review and update personal user information ranging from time zone, assigned roles, approver information, email preferences, and more.

6. **More>> Navigation Menu.** For users that have access to more than seven navigation menus, an eighth menu is displayed on the far right side of the screen. This menu contains a drop down list which displays the text *more>>*. Expanding the drop down list reveals the remaining navigation menus available to that user. Upon selecting the desired navigation menu, the screen below refreshes to display the specific topic or function covered in that particular part of the application, just as if any of the static navigation menus had been selected.

    For users with the Customize Navigation permission, this drop down list will also appear, even if that user has access to seven or less navigation menus. The drop down list contains a "customize" option at the bottom of the list. Selecting this option redirects the user to the Navigation Setup screen where the navigation can be customized to best suit the user's needs.

7. **Shop at the Top.** Simple and Advanced Search can be accessed from the home/shop → shop sub-tab. This is a key feature of the application and is used for searching for items and products...

8. **Action Items Box** – This box contains quick links to important information for the user logged in. Depending on the user's role (shopper, approver, administrator), the information displayed will vary. Standard requisitioners will see a link to recent and completed Carts, Requisitions and Purchase Orders, and a notification if any requisitions have been returned for updates/review. Approvers and Administrators also have links to the approvals tab, price files, user registrations and other tasks. *NOTE: Depending on how your site is set up, the Action Items box may display below the Organization Message.*

9. **The Organization Message** is an important tool for communicating with the user community. The Organization Message is available to all users and is a common way to communicate important upcoming dates, information about new suppliers, links to training/education materials, changes in the purchasing process, and more. *NOTE: Depending on how your site is set up, the Organization Message may display above the Action Items box.*

10. **Purchasing Showcase** – The Purchasing Showcase is used to highlight suppliers and forms recommended for use by requisitioners and shoppers. This is an optional feature of the system, and if not used, this area will be empty.

11. **Punch-out** – Punch-out suppliers can be accessed from this area of the screen. Punch-out suppliers are optional and may not be found on all sites.

12. **Navigation Sub-tabs.** Beneath the top-level navigation are sub-tabs. As with navigation tabs, the sub-tabs displayed depend on the permissions granted to the individual user. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of the application.

13. **Online Help.** Online Help is accessed by clicking on the question mark anywhere in the application () or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays. For those organizations who have the feature enabled, hover help is enabled, which allows users to view help for a field when pausing at a field.

Lesson 2: Accessing the Application

This lesson focuses on end-user access to the SelectSite application. Depending on your organization's configuration and whether login is integrated with an external system, the details of registration and login varies.

Key Concepts

User Registration and Login

There are a few key ways in which users can register and login to the application. Depending on how your organization has selected to configure the application, one of the following methods will be applicable:

- **User Self Registration** – With this method, a user logs directly into SelectSite (via a specific address entered into a web browser). Once accessing the application, the user requests to use the site by registering his or her information. From there, the user will either automatically be approved as a standard requisitioner or shopper OR an administrator will review the user's request for approval/rejection. For more information, refer to Registering as a New User on page 10 for more information.
- **Administrative Setup and Notification** – Users are set up by an administrator, and each user is notified of their username and password. Registration is required from the user if his/her username is created by an administrator. Once the user receives his or her username and password, the user can login to the application. Refer to Logging into the Application on page 10 for more information.
- **Access via an External Application** – Users log into an organization-specific portal or an ERP system (such as Oracle, SAP, Ariba, etc), and the user information is sent over to SelectSite where the information is verified and automatically logged in. With this method of user setup and access, each integration varies slightly. For example, for clients that only use the Spend Director module, users may log into their ERP system, and then click the SelectSite option to access the application. Information is sent from the ERP system and no additional information is needed in terms of user setup. In another scenario, administrators may be required to set up a user in SelectSite PRIOR to access from the external system. Contact the System Administrator for more information on external login.
- **Direct Login with External Validation** – With this method, users login directly into the SelectSite application. They enter their standard username and passwords and this information is validated from your organization's servers via LDAP.

Users and Roles

A user is any person that has access to the SelectSite application. Each user is assigned a username and password to identify who they are, what their permissions are, and other user-specific information such as ship-to addresses, custom field values, and more. Users can be assigned to a specific role or roles, can be assigned to a specific department, have specific product views controlling what items are available to them, and more.

Roles are created to manage users with similar permissions. Each application will have at least two roles: One representing standard requisitioners and one representing system administrators. One role must be designated as the default role. In most cases, the default role is the requisitioner role (end users). Roles provide a time-efficient method for managing user information. For example, instead of changing user permissions individually, simply update the permissions at the role level, and the system will automatically update user permissions. It is possible for users to have more than one role.

Shoppers and Requisitioners

Requisitioners are individuals that can shop for items and submit a requisition. By submitting a requisition, all required information must be filled out – such as ship to information, required accounting fields, etc. Some organizations also set up a Shopping role that allows a user to shop, then assign a cart to another individual (user or approval) for submission and processing. Shoppers simply add items to their cart, but are not required to enter detailed information about the requisition.

Exercises

Logging into the Application

This exercise demonstrates how a user can log in **directly** to the SelectSite application. This exercise assumes that the user has been registered and approved.

IMPORTANT: Keep in mind, many organizations access SelectSite through a different login. For example, you may login to a portal, then automatically be logged into SelectSite. This exercise only pertains to direct login (i.e. – no login integration). Please contact your system administrator if you have questions about your login if an integration method is used.

Note: In some cases, users may have more than one site that they access. For example, your organization may have a training and production site. Please make sure you are accessing the correct URL.

Step by Step

The goal of this exercise is to log into SelectSite.

1. Go to the address specified by your organization's administrator using the preferred Internet Browser. Typical URLs are as follows: http://solutions.sciquest.com/<org name>.
2. Enter a valid **User Name** on the login screen. Username is case sensitive. If unsure of the proper User Name, then contact then System Administrator.
3. Enter a valid **Password** on the login screen. Passwords are case sensitive. If unsure of the proper password, then reset the password through the **Forgot Your Password?** link just below the Password field. *Note: This link is not available on all sites.*
4. Click the **Go** button. The SelectSite application displays. Once logged in, the role(s) and permissions assigned to the user dictate what screens are visible and what functions are accessible.

IMPORTANT:

If the user does not have a user name, then he/she should register from the application or contact the System Administrator.

REGISTERING AS A NEW USER

By registering as a new user, the user is indicating that he/she would like to search for and order items via SelectSite. When registering, users must set up basic information such as user name, password, and contact information.

After registering, users will either be taken to the application as a default user (requisitioner or shopper) OR an administrator will review the registration and accept or reject it. The new user will receive an email when the registration is processed.

Step by Step

The goal of this exercise is to access the SelectSite login page, and from there, register as a new user.

1. Go to the address specified by the administrator, for example: http://solutions.sciquest.com/<org name>.
2. Select the link at the bottom of the screen that reads: **If this is your first visit, please register here**. This will take users to the **New User Registration** form.
3. Complete the form, including all required fields (indicated by bold text). Note: Users should complete the *Question* and *Answer* fields so that the password can be reset by an Administrator, if necessary.
4. Click the **Submit** button.
5. Click the **Back to Login** link.
6. Check the Inbox of the email address entered in Step 3. The user should receive a confirmation message once the registration has been submitted and processed

.

Lesson 3: Updating your Profile

Each user in the system has a unique profile, including identification, purchasing abilities, and site accessibility. The purpose of this lesson is to better understand what information is captured in the profile, along with what should be updated by the user.

IMPORTANT:

> **Most organizations allow users to access their profile, even if it is only read-only. The exception is with Spend Director-only sites. If access to the profile has not been granted, this lesson is not relevant.**

Key Concepts

User Profile

Users with the appropriate permissions have the ability to access their own profile. Selecting the **profile** navigation menu provides access to the user profile screen. The screen is also accessible via the **profile** link in the application header.

The user profile screens are grouped into tabs, each with its own set of sub-tabs, for easy viewing. Below are a few examples of what can be captured in the user profile:

- Roles and permissions (access to site)
- Department and position assigned (if applicable)
- Cart Assignees for a Shopper
- Financial approver assignments
- Custom field values
- Email Notifications
- Bill To and Ship To addresses

Depending on the permissions granted, the sub-tabs may be editable or read-only. Profile information can be set up by an administrator, users, or a mix of both. It depends on the individual organization's business practice.

The exercises in this section assume the user has view and edit access to the profile.

Permissions

Permissions determine what a user can do in the site. Permissions are broken down by related topic such as shopping and administration. A few sample permissions are listed below:

- Shopping – allows online shopping in SelectSite
- Punch-out – provides access to punch-out suppliers
- My Favorites – allows access to view and edit personalized favorites items

Permissions can be assigned at both the role and user level. Permission access for a user is set up in the user's profile; under the permissions tab. Click on the permission name to view a description of the permission (online help for the permission).

The following table provides a full list of permissions, along with descriptions of each.

Tab/Section of Profile	Permission Name	Permission Description
Shopping / Cart Shopping		
	Hosted Catalog Search	Ability to perform searches across the hosted catalog only.
	Punch-out	Ability to access Punch-out vendors.
	View/Use Forms	Ability to use all system-defined forms such as service form, supplier form, etc.
	View/Use Non-Catalog Item	Ability to use the non-catalog item entry screen.
	Non-Catalog Configuration	Allows a user to modify the standard Non-Catalog Form or Item.
	Bypass Non-Catalog Search	When turned on, allows the user to bypass the required search of the hosted catalog for the item (by SKU) requested. To force a user to search the hosted catalog, turn this permission off.
	Modify Order Distribution Information on Forms & POs	Allows the user to override and change the order distribution settings for a supplier master supplier in a form, as well as to do the same for any supplier on a PO, both in workflow and post-distribution (for resends). The user will be able to click a checkbox to edit the specific distribution information for a request. Any changes only affect the specific request and do not affect the settings in the supplier profile.
	Create Free-form Supplier on Form Templates	Allows user to enter a new supplier when completing a form template. A user with this permission can enter a supplier outside of the supplier master list.
	Create New Form Template	Provides a user the ability to create a new form template based on a form type of Capital Expenditure or Service.
	View/Use Personal Favorites	Controls access to personalized favorites. Users with this permission can add favorites or personalized forms into personal folders.
	Administer Shared Favorites	Provides the ability to create shared folders for favorites and forms, and add items (favorites and forms) to the folders. Shared folders can be organization-wide or for a specific group of users.
	Create Shared Favorites Folders	This permission allows users to create and administer their own shared favorites folders. This permission does not allow users to edit carts created by others, create organization-wide shared folders, or access shared folders

Tab/Section of Profile	Permission Name	Permission Description
		to which they are not added.
	Edit Organization Favorites	Provides the ability to edit and configure the organization's favorites list. This permission also prevents editing of Organization Forms. Users without this permission will still be able to access the form and save it to their personal Favorites folders. They will not be able to overwrite the original Organization Form.
	View Product Compare	Provides the capability to use the product comparison feature in search results.
	Chemical ReSource	Provides access to the Chemical ReSource and Chemical Structure Search tool.
	Antibody ReSource	Provides access to the Antibody ReSource module.
Shopping/Cart **Cart/Requisition**		
	Prepare Req for Another User	This permission turns on the Prepared For field in the Header Information section of the requisition and is also required in order to be an “assignee” for a shopper assigning his/her cart. This field allows a user to order on behalf of another individual.
	Do not permit Place Order	This permission prohibits the user from being able to complete the checkout process. The permission is OFF by default which allows the user to checkout and submit a cart for approval. Typically, this permission is granted to shoppers who assign carts instead.
	Assign Cart to Another User	Provides the ability to assign a shopping cart to another user. The permission activates a new button on the cart page to perform this function. The user can select from a list of users that have the Prepare Req for Another User permission.
	Edit User's Cart Assignees	Provides the ability to edit the cart assignee list in a user's profile. The cart assignee list is a list of users that are available to a user when attempting to assign a shopping cart to another user. The permission also allows a user to find other users not in their profile at the time they are performing the assignment.
	Manage Assigned Carts	This permission allows a user to view the assigned carts sub-tab (under the carts tab). From here, a user can view all carts that have been assigned – by assignee or submitter – and reassign or unassign carts as needed.

Tab/Section of Profile	Permission Name	Permission Description
	Edit PO Number	Provides the user with the ability to define the PO number for a requisition prior to the actual PO being created (during PR workflow). This may be used to add a specific PO number to a requisition before it is distributed to the supplier.
	Edit Credit Card	Provides the ability to edit the card numbers stored in a user's profile. If the user is authorized to edit the card number at checkout, if necessary, turn this permission on.
	Manually Override Pricing	This permission allows users to manually change pricing for hosted catalog items. Changes can be made in draft shopping carts as well as pending PRs and POs. The user must also have the Edit Pending PR/POs permissions to change pricing for pending documents.
	Select Credit Card from Profile	Provides the ability to select a credit card number (if enabled) at checkout to apply to line items in the requisition. Card numbers are stored in a user's profile.
	Header-level internal attachments	Provides the ability to attach internal documents and URLs at the header level in a requisition.
	Header-level external attachments	Provides the ability to attach external documents and URLs at the header level in a requisition. Header level external attachments on a requisition are distributed on all fax or email POs generated by the requisition.
	Line-level internal attachments	Provides the ability to attach internal documents and URLs at the line item level in a requisition.
	Line-level external attachments	Provides the ability to attach external documents and URLs at the line item level in a requisition. Line level external attachments on a requisition are distributed on a fax or email PO to the specific supplier of that line item.
	Allow editing of Tax, Shipping, and Handling	Allows a user to override system defaults and enter custom Tax, Shipping and Handling charges both in shopping carts and approvals (PR or PO).
	Bypass Review	Ability to place a requisition without looking at the Review breadcrumb page.
	View Line Item History	This permission allows a user to perform a line item history search. Line item history searches past requisitions and orders for the exact catalog item.

Tab/Section of Profile	Permission Name	Permission Description
	Withdraw PR	Provides the ability to withdraw a requisition or line item from PR workflow prior to PR approvals being completed.
	Modify PO Clauses in PR/PO	For requisitions, controls the ability for users to add additional clauses. The user will also be able to remove clauses that have been added in addition to the clauses associated from the organization, supplier or contract. For purchase orders, controls the ability for a user to add and remove all clauses.
	View other user's draft carts	Enable this permission to view draft carts created by other system users. When viewing another draft cart, you are presented with a read-only view of the cart and its contents. For example, a user may call the Help line in the Purchasing Department and the support staff can see the user's screen. When viewing the draft cart the support staff will be looking at a read-only view of the user's cart and can assist the user with any questions they may have about completing their cart.
Orders **My Orders/** **Organization Orders**		
	View My Orders	Provides the ability to a user to view his or her orders through the order history link.
	View Organization Orders	Provides the ability for a user to view all of the organization's orders through the order history link.
	Edit Organization Orders	Provides the ability for a user to edit and update any organization orders.
	Revise PO	Allows a user to revise a purchase order once it has been sent to a supplier. This may be necessary in the event that there is a minimum quantity required or if the price changes, etc. This permission does not include the ability to resend a PO to a supplier. Users with this permission will see in Purchase Order History editable fields on the Summary and Details tabs, the *Finalize Revision* action in header Action list, and the Revisions tab.
	Close purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this permission is on, the user will have the purchase order action to **Close PO** if the purchase order is currently open.
	Open purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this

Tab/Section of Profile	Permission Name	Permission Description
		permission is on, the user will have the purchase order action to **Open PO** if the purchase order has already been closed.
	Resend PO to Supplier	Allows a user the same permissions as *Revise PO* as well as the ability to resend purchase orders to suppliers via fax or email. Resending a PO automatically creates a revision.
	Resend PO to External System	Allows a user to resend an order to an external system via the PO export. This permission is only application with customers that have an export integration.
	Export Search Results	This permission provides the ability to export information from the following sections: PR, PO, Receipts, Invoices, and Fulfillment POs. Once the export request is made, the user will have access to the Search Exports screen (located on the History tab) to view their own exports.
	Manage Company Exports	This permission provides access to manage exports across an organization. Users with this permission will be able to see all exports and delete any export if necessary.
	Manage Order Failure Notifications	Users with the **Manage Order Failure Notifications** permission have access to the **PO Distribution Maintenance** (po dist maintenance) page, which is under the **error mtg** tab. When the system receives a fax failure notification, it will determine if the order was distributed using customized order distribution information, and, if so, it will post an entry in the table. Users with this permission also have the option to enable the *PO Distribution Failure Notice* email in their user profile Email Preferences.
	Search History by Approver	This permission allows end users to search for their orders by specific approvers – in other words by the people that approved/rejected their orders. Users with department access can search by approver and all the orders that the user has approved within that department display. Users with organization-wide history permissions can view all the orders the selected approver has reviewed. When this permission is granted, an additional filter (By Approver) is provided in the PR and PO History screens.
	Revise Purchase Order Number	This is a high-level permission and should only be granted to a select few individuals at

Tab/Section of Profile	Permission Name	Permission Description
		your organization. This permission allows a user to modify the system-generated purchase order number prior to or after the PO is sent to the supplier. An example of when this is done is if your organization's financial system is down and you need to go in and update the number once the "real" number is available.
	View Sensitive Credit Card Details	Allows the user to view credit card information within the application. A user with this permission can see the full credit card number, expiration date, and card security code on documents in the application. This permission is OFF by default.
	Manage Integration Export Failures	Users with the **Manage Integration Export Failures** permission can manage Batch PO and/or Invoice export failures through SelectSite. Users will this permission have access to the error mgt navigation tab, and subsequent sub-tabs: PO export queue and Invoice export queue. Users with this permission also have the option to enable the following emails in their user profile Email Preferences: Invoice *Export failure notification* and *PO Export failure notification*.
Orders/ **Sales Order Fulfillment**		
	Forward Sales Orders	This permission allows users to forward a sales order to another user that is allowed to fill sales orders. This permission is typically granted to stockroom personnel using Supplies Manager or individuals receiving orders initially for third-party suppliers.
	Fulfill Sales Orders	This permission should be granted to any user that is responsible for viewing and filling sales orders.
	Assign Substitute Approver for Sales Order Approvals	Provides the user with the ability to assign a **substitute** for a sales order approvals folder. This permission displays the Substitute link on the sales order fulfillment approvals list page.
	Edit Any Pending Sales Orders	Provides the user the ability to edit any Sales Order that has not been completed/closed. This includes any Sales Order currently assigned to another approver for fulfillment.
	Approve/Reject Sales Orders on behalf of another Approver	Provides the ability to approve or reject sales orders for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to

Tab/Section of Profile	Permission Name	Permission Description
		open POs that are assigned to another user and continue them in the process. The “change of hands” is tracked in History. This permission does not allow a user to view another user’s folders. You must have the permission below (Manage Other Approver’s SO Approval folders) to perform this task.
	Manage Other Approver’s Sales Order Approval folders	Provides the ability to access and view another user’s Sales Order approval folders. With this permission, you can view another approver’s workload. To be able to approve or reject the orders that you are reviewing, you must also have the permission listed above (Approve/Reject Sales Orders on behalf of another person).
	Create Sales Invoices/Credit Memos	User is able to create a sales invoice or credit memo. The completed sales invoice/credit memo will be delivered to the customer’s SelectSite/HigherMarkets Settlement Manager module
	View Sales Orders	The user can see the Sales Order Search screen, perform Sales Order searches, view Sales Order Search Results and view Sales Orders.
	View All Sales Orders	Provides the ability for a user to search and view all of the organization's sales orders and corresponding shipments, regardless of fulfillment center access assignments for the user.
	Close/Complete Sales Order	The user will be able to close the sales order once the sales order has been totally shipped.
	Manage Order Failures	An administrative permission that allows the user to view orders that were not emailed/faxed properly and resend if needed. This setting allows a user to see all orders – across all business units (if applicable).
	Manage Business Unit Order Failure Notifications	An administrative permission that allows the user to view ONLY those orders in the user’s business unit that need to be resent due to fax or email issues.
Orders / **Sourcing Director**		
	Create and Manage Sourcing Events	This permission is off by default and allows users to send items out to bid as well as to view information about sourcing events. Access to the Sourcing Director module is required for this permission.
Approvals/		

Tab/Section of Profile	Permission Name	Permission Description
Requisition Approvals		
	Edit Pending Requisitions	Provides the ability to edit and update any pending requisitions within the approver's folders.
	Approve/Reject Requisitions	Provides the ability to approve or reject requisitions within an approver's folders.
	Forward Requisitions	Allows an approver to forward a requisition to another approver. This permission displays the Forward button on the PR approvals page.
	Reject Requisition	Provides the ability for the approver to reject a requisition in one single action rather than line by line
	Order Consolidation	Provides the ability to create and submit consolidated carts. Items can only be consolidated from a requisition if the requisition is in pending status within the Order Consolidation workflow folder. This permission is only available with PR workflow.
	Put Requisitions On Hold	Allows an approver to put a requisition on hold. A requisition that is on hold will remain in that approver's PR approvals folder. This permission displays the Hold option in the PR approvals Action lists.
	Expedite Requisitions	Provides the user with the ability to Expedite a requisition through the PR approval process. A user with this permission can "pull" a requisition through any pending PR workflow steps (that permit expediting).
	Assign Substitute Approver for Purchase Requisition Approvals	Provides the user with the ability to assign a substitute for a requisition approvals folder. This permission displays the Substitute link on the PR approvals list page.
	Add Products to Consolidated Cart	Allows the user to add products to a draft order consolidation shopping cart (Order Consolidation is part of requisition workflow only).
	Add Lines to Pending Requisitions	Provides the ability to add a new line to any pending requisitions within an approver's personal PR approvals folder. Approvers with this permission will have the Add to Other Cart/PR/PO action on the Search Results page.
	Restart/Skip Requisition Workflow Steps in Error	Provides the ability to restart workflow for any pending requisitions within an approver's personal PR approvals folder. This is typically necessary with workflow that triggers or

Tab/Section of Profile	Permission Name	Permission Description
		receives integration messages. If an acknowledgement message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows and admin to restart the step, i.e., resend the message.
	Edit Any Pending Requisitions	Provides the ability to edit any pending requisition regardless of whether it is assigned to you or not. The types of pending requisition that can be edited are the following: ▪ Unassigned requisitions in a shared folder ▪ Requisitions assigned to another approver's personal workflow folder Requisitions in a workflow error state in an automated workflow step.
	Approve/Reject Requisitions on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The “change of hands” is tracked in History. This permission does not allow a user to view another user’s folders. You must have the **Manage Other Approver’s Requisition Approval folders** permission to perform this task.
	Manage Other Approver’s Requisition Approval folders	Provides the ability to access and view another user’s Requisition approval folders. With this permission, you can view another approver’s workload. To be able to approve or reject the orders that you are reviewing, you must also have the **Approve/Reject Requisition on behalf of another person** permission.
	Expedite requisition through all workflow steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PR workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Approvals/ **Purchase Order Approvals**		
	Edit Pending Purchase Orders	Provides the ability to edit and update any pending purchase orders within the approver's folders.

Tab/Section of Profile	Permission Name	Permission Description
	Approve/Reject Purchase Orders	Provides the ability to approve or reject purchase orders within an approver's folders.
	Forward Purchase Orders	Allows an approver to forward a purchase order to another approver. This permission displays the Forward option in the approvals Action lists.
	Put Purchase Orders On Hold	Allows an approver to put a purchase order on hold. A PO that is on hold will remain in that approver's PO approvals folder. This permission displays the Hold option in the PO approvals Action lists.
	Expedite Purchase Orders	Provides the user with the ability to Expedite a purchase order through the approval process. A user with this permission can "pull" a PO through any pending steps (that permit expediting).
	Assign Substitute Approver for Purchase Order Approvals	Provides the user with the ability to assign a substitute for a purchase order approvals folder. This permission displays the Substitute link on the PO approvals folder page.
	Add Lines to Pending Purchase Orders	Provides the ability to add a new line to any pending purchase order within an approver's personal PO approvals folder. Approvers with this permission will have the Add to Other Cart/PR/PO action on the Search Results page.
	Restart/Skip Purchase Orders Workflow Steps in Error	Provides the ability to restart workflow for any pending purchase orders within an approver's personal PO approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgement message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows and admin to restart the step, i.e., resend the message.
	Edit Any Pending Purchase Orders	Provides the ability to edit any pending purchase order regardless of whether it is assigned to you or not. The types of pending purchase orders that can be edited are the following: ▪ Unassigned purchase orders in a shared folder ▪ POs assigned to another approver's personal workflow folder ▪ POs in a workflow error state in an automated workflow step.
	Approve/Reject PO on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very

Tab/Section of Profile	Permission Name	Permission Description
		powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The “change of hands” is tracked in History. This permission does not allow a user to view another user’s folders. You must have the **Manage Other Approver’s PO Approval folders** permission to perform this task.
	Manage Other Approver’s PO Approval folders	Provides the ability to access and view another user’s PO approval folders. With this permission, you can view another approver’s workload. To be able to approve or reject the orders that you are reviewing, you must also have the **Approve/Reject PO on behalf of another person** permission.
	Expedite PO through all workflow steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PO workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Accounts Payable / Budget		
	View Budget Details	User can view the information of a budget by accessing it through the organization setup/budget screens. No editing of budget information is permitted.
	Create/Edit Budget Details	The user is allowed to manage budget parameters, e.g., definition of fiscal year as well as create and edit budgets for custom field values. The View Budget Details permission is not required.
Accounts Payable / Invoice Approvals	** Please refer to Settlement Manager Handbook for details. **	
Accounts Payable / Settlement Manager	Create Receipts	The user can create receipts for the purchase orders to which they have access. For example, users with My Orders permission can create receipts only for purchase orders they create.
	View Receipts	The user can view receipts for the purchase orders to which they have access. For example, users with My Orders permission can view receipts only for purchase orders they create.
	Enable Blind Receiving - (Hide Order Quantity during	If the user has this permission, they will not see the quantity ordered when creating

Tab/Section of Profile	Permission Name	Permission Description
	receiving)	receipts. This is a common practice when central receiving is done by shipping dock personnel versus desktop receiving where the person placing the order is also receiving it.
	View My Invoices	Allows a user to view his or her invoices in the application. If this permission is set to OFF, the user does not see the invoice link in the Settlement tab or the invoice tab on the Purchase Order screen. The user cannot edit the invoice with this permission, which is controlled through the Create / Edit Invoices permission.
	View Organization Invoices	Allows a user to view all invoices in the application. If this permission is set to OFF, the user does not see the invoice link in the Settlement tab or the invoice tab on the Purchase Order screen. The user cannot edit the invoice with this permission, which is controlled through the Create / Edit Invoices permission.
	Create / Edit Invoices	Allows a user to create invoices manually as well as edit invoice details. A user with the permission turned ON has the ability to edit the invoice details with the exception of the invoice status. The ability to change invoice status is controlled by two permissions: Set Invoice as Payable and Set Invoice as Paid.
	Set Invoice as Payable	Controls the user's ability to set an Invoice to a Payable status. If this permission is off, the user does not have the option to set the invoice status to Payable. The user must have Create/Edit Invoice permission the change the status of an invoice.
	Set Invoice as Paid	Controls the user's ability to set an Invoice to a Paid status. If this permission is off, the user does not have the option to set the invoice status to Paid. The user must have Create/Edit Invoice permission the change the status of an invoice.
	Match documents within tolerances	Provides the ability for the user to match documents that are within the configured tolerances.
	Force match documents	Provides the ability for the user to match documents that are outside the configured tolerances for the selected documents.
	Unmatch documents	Controls the user’s ability to change Match status for the selected documents from Matched to Unmatched.
	Resend Invoices to External System	Allows the user to re-submit an invoice to be exported to the external system(s). The external system must be configured to allow

Tab/Section of Profile	Permission Name	Permission Description
		invoice resends (see organization setup > system > document export > Connection Mgt) and the invoice must have been initially exported to the external system(s). In this event, the user will see the Resend Invoice button on the invoice.
Administration/ System Administration		
	Administration	This set of permissions allows a user to access and modify settings within the Administration application. Users must have this permission, in addition to other Administrative permissions, to access and modify any of the Administrative functions.
	Field Management	This permission allows users to change field display text, update a field as visible or required, change help text, add and delete values from lists and activate or inactivate lists. Users may also edit field-based help when granted this permission.
	List Management	With this permission, users may create lists (where lists exist in either dropdown menu or list box fields) and add and edit values within those lists.
	Custom Field Management	Provides access to the custom field administration screens. Users with this permission can: Add/Edit custom fields Add/Edit custom field values Select the positioning of new or existing custom fields
	Address Management	This permission provides the recipient access to the Address Management section through which a user can create or modify Ship To/Bill To addresses. As address modification can be dangerous in the application, please give this permission only to users who have been trained on this functionality and are aware of the implications of Address Management.
	Manage Shared Workflow Folders	Provides the user with access to manage all types of workflow folders (PR, PO, etc.); with this permission, the user can control user access to any workflow folders.
	System Configuration	With this permission a user has the ability to access and edit system configuration settings, including security and session settings, language support, automatic job generation (replenishment), and system color settings.

Tab/Section of Profile	Permission Name	Permission Description
	License	With this permission a user may access the license section under the configuration tab. It is recommended that this permission only be given to users in the Super Repository Manager role.
	Transaction Reports	Controls access to transaction reports within administration (Orders reports and Spend reports). Users with this permission can also view and download monthly Data Extracts and Templates.
	Catalog Reports	Provides Catalog Administrators with access to catalog Content Reports, as well as ability to approve/reject pricing files and the pricing file audit trail.
	Usage Reports	This permission allows users to view reports related to site usage – by day, month, etc.
	Consortium Reports	This permission is only applicable to sites that are set up as a consortium – They allow the user to see rolled up summary reports of what spend has happened on each of the member organizations for a consortium supplier.
	Edit Company Message	Provides the ability to edit and update the company message. Users with this permission can also use the Email Users functionality to send emails directly from SelectSite to system users.
	Edit Resource Information	Controls access to edit the Resource information (e.g. support phone and email) on the home page. Users with this permission can edit and update this information.
	Consortium Contract Administrator	The Consortium Contract Administrator permission gives the user the ability to view and subscribe to contracts that have been shared by their Consortia. In addition, this permission gives the user the ability to administer the member-level settings for the shared contract, including: Accessibility, Contract Type, Fulfillment Centers and Non-Catalog capabilities. This permission is only visible to organizations that have been set up with a *member* relationship to a Consortium that has the Contract Manager module. If the member organization also has Contract Manager module, this permission does **not** give the user any permissions to administer or edit member-created contracts. This permission is completely independent of the Contract Administrator and Contract Owner permissions.

Tab/Section of Profile	Permission Name	Permission Description
	Contract Manager	Contract Manager is the greater of the two Contract Management permissions. Users with it are able to manage any and all contracts. They may view others' contracts irrespective of the non-owners Full or Partial visibility. They may view all Contract Reports.
	Contract Owner	Contract Owner is the lesser of the two Contract Management permissions. Users with it are able to manage only their own contracts. They may view others' contracts where the other owners have granted non-owners Full or Partial visibility, and they may view reports based on the same limitations.
	Advanced Dynamic Workflow	This permission allows a high-level user (admin) access to advanced dynamic workflow, which is used to set up advanced rules to trigger workflow approvals.
	Edit Items/Catalogs	Provides access to the item/price navigation menu, where item information is loaded and updated in SelectSite.
	Syndicate Items/Prices	Provides the ability to promote item and price data to users via product search.
Administration/ User Administration		
	View My Profile	With this permission users may access and view information submitted when the user generated their user profile. This user profile is generated the first time a user logs in or completes registration in the application.
	Edit My Profile	When granted this permission users may access, edit, and update the information submitted in their user profile. In order to activate permission editing, the user must have the Edit All User Profiles/Roles/Permissions permission.
	Change Password	Users with this permission have the ability to change their password. If the user also has the access to other users' profiles, this person may change the passwords of other users as well.
	Edit Personal Information	This permission grants access to the Personal Settings sub-menu under the profile > User Settings tab. Information such as Language, Country, Time Zone, Font Size and Color Theme are all managed from this screen.
	View All User Profiles	This permission allows users to access and view user profiles of other users registered in the application.

Tab/Section of Profile	Permission Name	Permission Description
	Edit All User Profiles/Roles/Permissions	With this permission users may access and utilize functionality to create, search for, and grant roles and permissions to users within the application. This permission also allows the user to enter comments on user profiles.
	Edit Roles/Depts/Relationships	Allows users to create and edit roles within the application. Permissions can be associated with roles that have been created within the HR Configuration section.
	Edit My Supervisor for Approvals	Provides access to the user to select their supervisor for use in financial approval. Once selected, any requisitions that exceed the user's spending limits will be routed to their supervisor for approval.
	Edit User's Financial Approvers	Select or remove financial approvers for all users.
	Customize Navigation	Users with this permission have the ability to select which navigation menus appear at the top of the screen as well as the order in which they are displayed. By default, this permission is turned off. Users that possess this permission and the Edit All User Profiles/Roles/Permissions permission have the added ability to define the navigation menus for other users in the system.
	Edit Fulfillment Center Access	This permission allows a user to determine who has access to which fulfillment centers, which in terms of Supplies Manager, represents individual stockrooms.
Administration/ Catalog Administration		
	Catalog Management	Provides access to the catalog management tab features except for **content** (item administration) tab and the **pricing>price sets** tab. A user must have **Approve All Supplier Price Files** or **Approve Assigned Supplier Price Files** to view the price sets tab. A user must have the **Manage Content** permission to view the **content** tab. A user with this permission has full view/edit access to the supplier's profile information. If your organization is a consortium parent or member, a user with catalog management permission may see the **pricing** tab for **consortium pricing** and extracts.
	Manage Content	A user with this permission has access to the **content** tab under **catalog management**. The user can affect item visibility, item

Tab/Section of Profile	Permission Name	Permission Description
		attributes, and extract/view supplier content updates. This user may also search for suppliers in catalog management to see summary information for the supplier. The user cannot see supplier profile details or edit supplier profile information. If the user also has one of the **Approve...Price Files** permissions, the user may select to extract **Content** for a price set from the **pricing>price sets** page.
	Approve All Supplier Price Files	A user with this permission has authority to approve all price files that come to the organization for review. The user will receive email notifications for all price files for the supplier (if email preference enabled).
	Approve Assigned Supplier Price Files	A user with this permission has authority to approve the price files for specific suppliers to which the user has been assigned, either through the **Supplier Mgt** tab in the user's profile, or for individual suppliers on the **Price File Approvers** tab in the Supplier's profile. The user will receive email notifications for the assigned supplier's price files only (if email preference enabled).
Custom Field Permissions (Note: The same four permissions display for each custom field enabled on your site.)		
	View Personal List	Allows the user to view the name of a particular custom field in the Custom Fields section. The user will also see an Edit button that will allow them to view or edit (depending on other CF permissions) the list of custom field values for this Custom Field. Without View Personal List or Edit Personal List permissions a user will not see the custom field name at all in the Custom Fields section.
	Edit Personal List	Automatically provides same functionality as View Personal List, but also provides the user a Create New Values button in the Custom Fields Edit section. Click to open the New Values section where the user may select from a list of org values (requires View Org Values permission) or create personal values (requires Create Values for Personal List permission). Without View Personal List or Edit Personal List permissions a user will not see the

Tab/Section of Profile	Permission Name	Permission Description
		custom field name at all in the Custom Fields section. Without Create Values for Personal List or View Org Values permissions a user will not actually be able to edit the list of custom field values for this custom field.
	View Organization Values	Allows the user to search through and select from organization-defined values for this custom field. NOTE: If an organization sets up custom fields so that end-users cannot select values or add values to their list (i.e. – view only), the end user will still be allowed to define a default value for the custom field).
	Create Values from Personal List	Allows the user to create their own values (stored in their profile) for this custom field.

Custom Fields

Custom fields are used to track information specific to an organization. Custom fields can be used to identify financial information associated with an order, used to assign a buyer, or can be used to identify Yes/No or On/Off type information. The number of custom fields, along with the custom field type, varies based on your organization's needs. Custom fields can display in a number of different locations on a purchase requisition or purchase order.

Depending on how the custom field is set up and what permissions are assigned to the users, a custom field can be viewable only be certain users/roles, can be freeform entry, can be selected from a administrator-defined list, or can be pre-selected for the user by an administrator. NOTE: In the cases where a user is given view-only privileges for a custom field, he/she will still be able to assign the default value.

NOTE TO SUNGARD HE CLIENTS:

There are required fields that must be set up in a specific manner to enable communication between the two systems. These include FOAPAL codes, Chart, and Commodity Code – which is optional. If additional custom fields are created in SelectSite, they will *NOT* be transferred between the systems.

Custom fields can be grouped, for splitting purposes. Splitting allows the assignment of multiple values to a field. For example, Department (custom field 1) and Account (custom field 2) are grouped. The user wants to split the purchase across Departments A and B, and to split across Accounts Y and Z. At checkout, the user enters a single split ratio (e.g. 60-40) for the group of fields, and then enters the Department and Account values. Splits can occur at the Header or Line level.

Custom Field Types

There are three ways a custom field can be populated, each of which is described below. The custom fields permissions dictate the field type for the custom field. The types include:

- **Free form**— With this type of custom field, the value of the field is entered by the user at checkout. This value is not validated by a previously created value. This type of field can be required or optional.
- **User-defined drop-down**— With this type of custom field, one or more values must be set up for the field in the user profile. The user can determine the value of the field in the profile (i.e. create new values for their own use). The values added to the profile are then available during checkout for selection.
- **Admin-defined drop-down**—In the last type of custom field, which is the most common for custom fields, the values selected in the profile are derived from a list defined by the administrator for all users. Users select admin values to be used in their profile, and the selected values display at checkout.

Searching by Custom Field

Purchase Order and Purchase Requisition History allows users to search by custom field. For example, you can search for all orders using a certain account number. For more information on searching, refer to the History lesson in this guide. NOTE: In order for a custom field to be available in History Search, an administrator must set it up to display.

Accounting Code Favorites:

Charging to different accounting codes on a requisition can be cumbersome for users. Users can store combinations of favorite accounting codes in their profiles and access them on the cart. Users who buy for different projects or who split purchases across different codes can store these frequently used combinations on their profiles and quickly select to use them during checkout.

Exercises

View and Update the Profile

IMPORTANT: This exercise is not relevant to Spend Director-only clients.

When first logging into SelectSite, navigate to the profile screen and review the current information, making changes as necessary. Depending on how the site is set up, administrators may set up ALL profile information or set up a subset of profile information. Users may have full, limited, or no access to their profile. **The exercises in this lesson assume the user has standard permissions (view and edit).**

At a minimum, basic information must be set up in a user's profile for a user to login and use the system. It is recommended to set up additional information prior to using the system so that the cart submission is easier. For example, by setting up a user's ship to address and default custom field values in his profile, the information will be defaulted into an order and does not require selection with each purchase.

Step by Step

This exercise is broken up by task. The goal of this exercise is for a user to access and view their profile, and update the appropriate areas. ONLY perform those tasks that are relevant for your organization and/or the user.

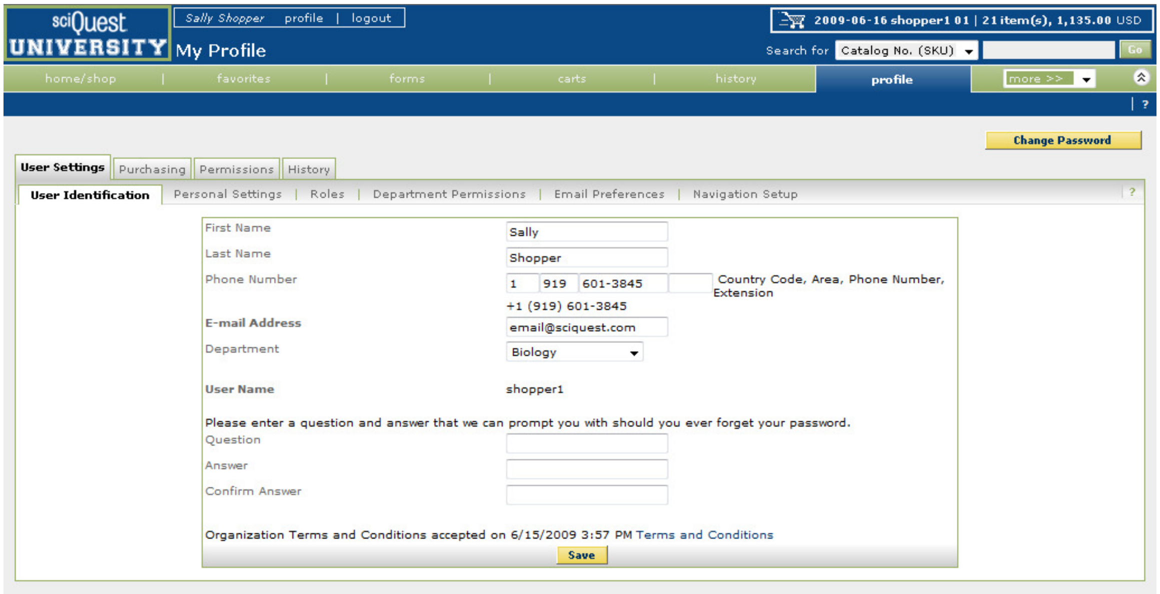
IMPORTANT:

Each of the profile tabs/sections mentioned in this exercise may not be applicable to your organization.

1. Access your profile. This can be accomplished a few different ways:
   a. The first time that a user logs into the system, the **My Profile** displays (shown below).
   b. … or… Click on the **profile** link at the top of the screen (to the right of the username).

c. … or… Select the **profile** navigation tab.

Once the profile is accessed, the **User Settings → User Identification** sub-tab displays.



2. Tips for working within the profile:
   - The available tabs in the user profile are dependent on which modules your organization has purchased.
   - To open any of the profile screens, select the top-level tab and then the desired sub-tab. Once a screen is displayed, it is in "edit" mode for those with the appropriate permissions.
   - Bold fields are required.
   - If any of the information is incorrect and the screens are read-only, contact your system administrator.
   - If the screen is editable, additions or modifications may be done directly within that screen of the profile.
   - The labels for the tabs may be different at your organization. Profile field labels are commonly renamed to better help users understand the purpose of each section.
3. Review and update your profile. Each of the tasks that can be performed is listed below:
   - Changing Your Password on page 34
   - Updating Basic Profile Information on page 35
   - Updating Personal Settings on page 35
   - Reviewing Roles and Permissions on page 36
   - Setting up and Reviewing Financial Approval Information on page 38
   - Setting up and Reviewing Cart Assignees on page 39
   - Setting up Bill To and Ship To Addresses on page 39
   - Setting up Custom Field Values on page 41
   - Setting up Accounting Code Favorites on page 43
   - Review User Profile History on page 44
   - Setting up Credit Card Information on page 46
   - Add Comments to your Profile on page 47
4. After updating the profile, click the **Save** button to save the changes. Note: The Save button must be selected on each screen for changes to be saved. Navigating to another screen without clicking the Save button will lose any changes made on the previous screen.

> **ADDING PROFILE VALUES FROM YOUR CART**
>
> **You can update profile data directly from the profile (as discussed here) or as you are reviewing your cart. Oftentimes you have the option to Save to profile, a checkbox available in the selection popup. NOTE: Defaults must be defined via the profile and cannot be defined directly from the cart screen.**

CHANGING YOUR PASSWORD

Occasionally you may need to change your password in SelectSite. For example, if your password has expired or if you have forgotten your password. Additionally, some organization's force users to reset their password if an administrator changes it for him/her. When creating a new password, the user is prevented from resetting their password back to the "old" value. Once the password has been updated, the previous password will no longer work in the system.

Administrators cannot see the current password for users in the system, they only have permission to reset passwords.

Two options for changing the password are detailed below. The first option uses a *Forgot your Password* link that displays on the login page. This link may not be available on your site. If this is the case, refer to option 2 or contact your system administrator for assistance.

Step by Step

The goal of this exercise is to change your password through one of the two methods explained below.

OPTION 1: When you forget your password…

1. From the **Login** screen, click the **Forgot your Password** link. The **Reset Password** screen displays.
2. Enter your username and email (associated with the user name), then click the **Go** button.

> **NOTE:**
>
> **This exercise is not applicable to organizations that access SelectSite via an external system or login.**

3. A **Reset Password Email** will be sent, containing a link back to the site. Either click this link or cut and paste it into the Web browser's address bar.
4. After the site opens, enter the answer to the question provided during registration, then a new password in both the **User Password** and **Retype User Password** fields.
5. Click the **Go** button. SelectSite opens and you are logged in.

OPTION 2: When you know your current password…

6. Login to the system.
7. Select the **Profile** navigation tab (or the profile link in the upper left-hand corner). The user profile displays.
8. Click the **Change Password** button. (Note: If this button does not appear on the screen, the permissions may be set such that this function is turned off). A secondary window displays.

9. In the secondary window, enter your current password in the **Old Password** field. Then enter the new password in the **New Password** and **Confirm New Password** fields.
10. Click **Change Password** to save the new password. The password has been updated.

NOTE: Click **Close** on the secondary window to cancel the password changes.

Updating Basic Profile Information

Basic user information, such as first name, last name, and contact information are updated through the User Profile. The information on the **User Identification** tab is editable with the exception of the username. This cannot be changed or modified. If a new username is needed, a new user will have to be created and the old user record can be inactivated if no longer needed.

Step by Step

The goal of this exercise is to update the information in the User Identification section of the User Profile.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
3. From the **User Settings → User Identification** sub-tab (which opens up automatically), modify any of the available information. First Name, Last Name, Phone Number, Email Address, Department and Position, and password fields are all editable.
4. Click the **Save** button to save any changes made.

Updating Personal Settings

The Personal Settings profile screen is used to determine the time zone, default color theme, and language. Each of the settings tracked in this section of the user profile are set up at an organization-wide level. By modifying this information in your profile, you are simply changing your particular settings.

Step by Step

The goal of this exercise is to update the Personal Settings section of the User Profile.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
3. Select the **User Settings** tab, then select the Personal **Settings** sub-tab.
4. Review the current settings. To make changes to this information, edit the desired fields and click **Save**. Each of the configuration options is described below:
    - **Language**: This field determines the language displayed on the screen.
    - **Country**: This field allows the user to select their country.
    - **Time Zone**: This field allows users to change their own personal time zone stamp. Time is tracked for each transaction logged in the system such as purchases made, approvals, and more. Note: Some organizations choose to keep all of their users on one time zone for easier record-keeping.
    - **Color Theme**: This field permits a user to override the organization's default **Color Theme**. The pre-defined color themes manage font, border, background and highlighting colors.
    - **Font Size:** This field permits a user to select the default font for the application. Three font size configurations are available – small, medium, and large. The default font size is Medium.
    - **Help on mouse over**: This field determines whether or not field-specific help displays when "hovering" on a field in SelectSite. This feature can also be disabled directly from the pop-up screen, and is by default, on. **Select Show help on mouse over and click** to

display hover help. If you would only like to see help if a field is selected (clicked), choose **Show help only on click**,

- **Access Training Content Configuration**: Checking the box for this setting exposes the training configuration icons throughout the application, where available. The purpose of the setting is to allow the administrators to take screenshots and view the application without training administration icons.

5. Click the **Save** button to save changes made.

Reviewing Roles and Permissions

Permissions determine what functions are available to a particular user, including what navigation tabs and screens are viewable and editable by the user. When a role is assigned to a user, default permissions are automatically given to the user, but can be overridden by an administrator if necessary.

Role and permission-related information is captured in a number of screens (tabs) in the user profile. The following areas of the user profile are discussed in this exercise:

- **User Settings → Roles**: Provides a read-only list of the role or roles assigned to the user.
- **User Settings → Document Access**: Provides a read-only list of the departments that the user is allowed to view data via History (PR History, PO History, Receipt History, etc). For example, the Manager of the HR department can view all orders processed for his department. By default, users can only see their own order history. Typically, approvers have access to at least one department in addition to their own personal order history.
- **Purchasing →Product Views**: Provides a read-only list of product view(s) assigned to the user. Product views are used to control what suppliers and types of products can be viewed by users. Your organization may or may not use product views.
- **Purchasing → Punchout Access**: Provides a list of suppliers whose website can be accessed directly from your SelectSite application. This read-only list is used to indicate which suppliers can be accessed from the user.
- **Permissions**: The Permissions tab contains numerous sub-tabs listing the available permissions, along with which permissions are enabled for the user. This information is defaulted from the role-level.

IMPORTANT:

This exercise assumes that the user has read-only rights to the areas of the profile discussed.

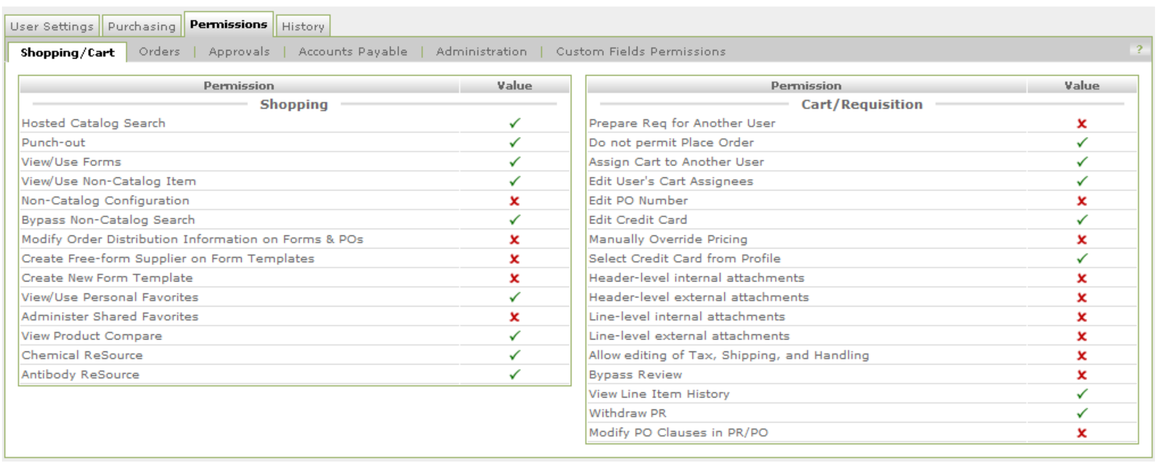
Step by Step

The goal of this exercise is to review what permissions are enabled for the user, along with which permissions are overridden from the role level.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
3. Review Role(s):
   a. Select the **User Settings** tab, then select the Roles sub-tab.
   b. Review the current role or roles that are assigned.
4. Review Departmental Permissions:
   a. Select the **User Settings** tab, then select the **Document Access** sub-tab.
   b. Review the list of departments assigned in the **My Departments** box. Department access is typically not granted to standard requisitioners. In this case, no departments will be listed on this

screen. Departments are not listed individually for administrators will Organization-wide access (a permission).

5. Review Product View(s):
   a. Select the **Purchasing** tab, then select the **Product Views** sub-tab.
   b. A listing of active product views displays. A green check (✓) in the Available column indicates the product view is enabled. A red X (✗) indicates the product view is disabled. Product views determine what hosted data is available to the user, including which suppliers are visible, what types of items can be viewed/ordered, and ordering limitations around hazards, chemicals, etc.
6. Review Punch-out Access:
   a. Select the **Purchasing** tab, then select the **Product Access** sub-tab.
   b. This section provides a list of available punch-out suppliers. A green check (✓) in the Available column indicates the punch-out supplier is available. A red X (✗) indicates the punch-out supplier is not available.
7. Review Permissions:
   a. Select the **Permissions** tab. The graphic below shows a sample permissions screen enabled for a shopper role:



Permission	Value
Shopping	
Hosted Catalog Search	✓
Punch-out	✓
View/Use Forms	✓
View/Use Non-Catalog Item	✓
Non-Catalog Configuration	✗
Bypass Non-Catalog Search	✓
Modify Order Distribution Information on Forms & POs	✗
Create Free-form Supplier on Form Templates	✗
Create New Form Template	✗
View/Use Personal Favorites	✓
Administer Shared Favorites	✗
View Product Compare	✓
Chemical ReSource	✓
Antibody ReSource	✓

Permission	Value
Cart/Requisition	
Prepare Req for Another User	✗
Do not permit Place Order	✓
Assign Cart to Another User	✓
Edit User's Cart Assignees	✓
Edit PO Number	✗
Edit Credit Card	✓
Manually Override Pricing	✗
Select Credit Card from Profile	✓
Header-level internal attachments	✗
Header-level external attachments	✗
Line-level internal attachments	✗
Line-level external attachments	✗
Allow editing of Tax, Shipping, and Handling	✗
Bypass Review	✗
View Line Item History	✓
Withdraw PR	✓
Modify PO Clauses in PR/PO	✗

   b. Permissions are organized by topic in the sub-tabs. A green check (✓) in the Value column indicates the permission is enabled for the user. A red X (✗) indicates the permission is disabled for the user. Review the permissions enabled.

NOTE:

For a detailed explanation of a permission, click the permission name from the profile. Online Help displays.

8. If you find that any information in your profile does not look correct, it is recommended to contact your system administrator.

Setting up and Reviewing Financial Approval Information

The workflow process in SciQuest is used to manage the purchasing approval process, along with managing system functions such as purchase order creation and delivery. The steps in a workflow process can vary based on organization, user, custom field values, dollar amounts, and more.

Financial approvals allow organizations to trigger approvals based on a user's financial limits. If this type of workflow approval is used by an organization, it is typically the first manual approval step in the workflow process. This means that outside of auto-rejections and other system validations, a user's financial approver is the first person to review and approve/reject the requisition.

How Financial Approval Works (if used): Financial Approval is required when a user submits a requisition that is above their allowed limit, in which case, an approval is required by a specified approver. For example, David Jones is assigned the Requester1 role with a requisition limit of $400. He submits a requisition for $45 which does not require Financial Approval. He submits a second requisition for $600, and Financial Approval is required.

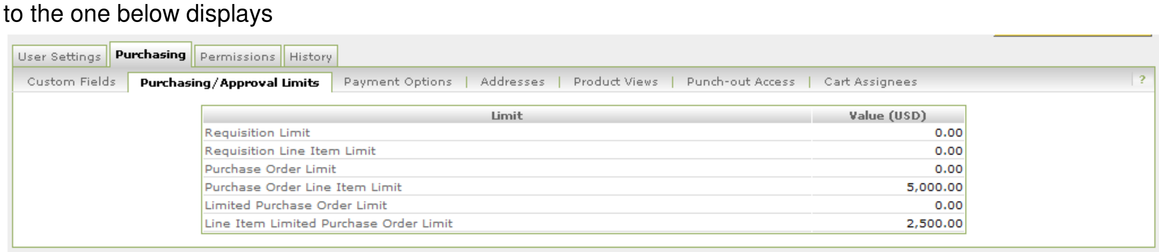
There are two sub-tabs in the profile related to a user's financial workflow setup. The **Financial Approvers** sub-tab identifies what other user(s) can approve your orders. **Purchasing/Approval Limits** is used to identify what amounts trigger activity such as approval.

The exercise below assumes that a user has read-only access to the Purchasing/Approval Limits screen of the profile and read-write capability to the Financial Approvers screen.

Step by Step

The goal is for an end-user to set up his/her up financial approvers, define a preferred approver, and review approval limits.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Review and update a user's financial approver list:
   a. Select the **Purchasing** tab, then select the **Financial Approvers** sub-tab. Any previously assigned financial approvers are listed.
   b. To add a user as a financial approver, click the **Add Approvers** button at the top of the screen.
   c. Perform a user search to locate the username for the desired financial approver(s). Only those users with approval permissions can be selected.
   d. When the desired financial approver has been found, click the **Select** button next to the Financial Approver's name, and click **Choose Selected User**. The approvers name displays in the approver list.
   e. From the approver list, click the **Preferred** button to make the user the default approver for your orders.
   f. Repeat steps 2b – 2d to add additional approvers to your list.
3. Review purchasing limits:
   a. Select the **Purchasing** tab, then select the **Purchasing/Approval Limits** sub-tab. A screen similar to the one below displays



Limit	Value (USD)
Requisition Limit	0.00
Requisition Line Item Limit	0.00
Purchase Order Limit	0.00
Purchase Order Line Item Limit	5,000.00
Limited Purchase Order Limit	0.00
Line Item Limited Purchase Order Limit	2,500.00

   b. Review the various limits and amounts. If the value for a specific type of limit is 0, this indicates that approval is required for all requisitions and orders. Otherwise, approval is only required when a requisition or order is above the total or line-item level value displaying on the screen.

IMPORTANT:

Only approvers with higher limits than the user are allowed to approve a requisition or order.

Setting up and Reviewing Cart Assignees

Some organizations set up a role that allows the user to shop, then assign a cart to another individual (user or approval) for submission and processing. These users are commonly referred to as **shoppers**. Shoppers simply add items to their cart, but are not required to enter detailed information about the requisition.

Two common scenarios for when a Shopper role is used by an organization are described below:

- **Shopping only user** – An organization wants to limit the number of users that need to be trained and set up in their ERP system. Therefore, the majority of users are set up as "shoppers" and orders are assigned to a "requisitioner" who is set up in the ERP system. This scenario is also helpful for users that may not be knowledgeable of accounting information, ship to details, etc.
- **Department/Lab usage** – In this scenario, users shop and fill a shopping cart, then assign the cart to a single individual in the department or lab for submission – i.e. –representing the "first" level of approval.

For users who are set up as shoppers, they are required to populate very little information in their profile. The two important parts of their profile to update include their basic info (phone, email, etc) and Cart Assignees, which is detailed below.

In some cases, an administrator will set up the assignees for a shopper. In order for a user to select his or her assignees, including the preferred assigned, he must have the **Edit My Profile** and **Edit User's Cart Assignees** permission enabled.

Please refer to the concept: Assigning a Cart **on page 109 and the exercise:** Assigning a Cart to a Requisitioner **on page 111for more information.**

Step by Step

The goal is for an end-user to set up his/her up cart assignees and define a preferred assignee. The exercise below assumes that a user is a shopper and CANNOT place requisitions in the system.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Review and update a user's cart assignee list:
    a. Select the **Purchasing** tab, then select the **Cart Assignees** sub-tab. Any previously assigned assignees are listed.
    b. To add a user as a cart assignee, click the **Add Assignees** button at the top of the screen.
    c. Perform a user search to locate the username for the desired cart assignees. Only those users with the **Prepare Req for Another** user permission will be listed as an option.
    d. When the desired assignee has been found, click the **Select** button next to the Cart Assignee's name, and click **Choose Selected User**. The assignee's name displays in the list.
    e. From the list, click the **Preferred** button to make the user the default assignee for your orders.
    f. Repeat steps 2b – 2d to add additional assignees to your list.

Setting up Bill To and Ship To Addresses

Note: This exercise is not applicable to Spend Director-only clients.

Billing and shipping information is required to place an order in SelectSite. Although address information can be entered each time an order is placed, it is recommended to set up billing and shipping information in the user profile to save time and provide consistency with each order.

Depending on your organization's setup, an administrator may set up user's address(es), users may select from a pre-defined list, or users select from a pre-defined list and add user-specific information (Attn:, room number, telephone number, etc).

There are two types of addresses that are user-defined for purchase orders:

- **Ship To:** The shipping address identifies where the supplier should ship the item(s). Some organizations have freeform lines in the ship to addresses, while others have a central receiving area and only require a single ship to address.
- **Bill To:** The billing address identifies where the supplier should send the bill for the item(s). In most cases, there is only one billing address, but in some cases, there are multiple billing addresses.

The exercise below assumes the ability to select from a list of pre-established addresses. Some organizations choose to set the site up so that addresses can only be set up by the administrator and cannot be modified by requisitioners. If this is the case, address information will be read-only.

Step by Step

The goal of this exercise is to add billing and shipping addresses in the profile. This information can later be assigned to an order/requisition through the Review page.

NOTE: The address selection process varies depending on an administrative setting. Task 1 details a method using overlay windows for selection of addresses. Task 2, which is applicable if the "Use Simple Address Edit" option is chosen by a system administrator for the site.

Task 1: Address selection using Overlay windows

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Select the **Purchasing** tab, then select the **Addresses** sub-tab. The **Ship To** tab displays.
3. To add a new address (typically the user's default address), press the **Select Addresses for Profile** button. Depending on the number of addresses available, a search interface or a drop-down box displays.
4. To select an address using the search interface, skip to the next step (5). If working form a drop-down list box, do the following:
   a. Expand the **Select Address Template** drop-down box.
   b. Select the desired address.
   c. Review the address information and make any necessary changes or additions. Required fields are indicated in Bold. Oftentimes, you may need to enter freeform text such as Attention To, Building, and Room Number.

> **IMPORTANT:**
>
> **An organization's business practice should dictate how addresses are selected and entered. Please contact your Purchasing department or Support team for recommendations regarding address selection and handling.**

   d. Check the **Default** checkbox if this address is the desired default Ship To address.
   e. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.
   f. Skip to Step 6.
5. To select an address using the search interface, use the following steps:
   a. Enter text to search for the **Nickname** or **Address** fields. Determine the desired number of results for display by selecting a number from the **Results Per Page** drop-down box.
   b. Press the **Search** button.
   c. Select the radio button adjacent to the address desired for the current user ID.
   d. Review the information and make any necessary changes. Oftentimes this includes entering freeform text such as attention to, building, and/or room number.
   e. Check the **Default** checkbox if this address is the desired default Ship To address.

f. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.

6. Press the **Delete** button to remove an address if the address was selected in error or if it is no longer needed.
7. Repeat the steps above to add any additional shipping addresses to the profile.
8. Select the **Bill To** tab.
9. Select a Bill To address by pressing the **Select Addresses for Profile** button. Follow the steps above to select a billing address. Note: The only difference in the steps is that billing addresses are being set up instead of shipping. Also, the format of Bill To and Ship To addresses may vary. For example, Bill To addresses typically do not have freeform rows.
10. When finished, there should be at least one Bill To and one Ship To address set up in the profile. It is recommended that one of each as marked as the default address. This will save time when checking out.

Task 2: Address selection using Simple Address Selection

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Select the **Purchasing** tab, then select the **Addresses** sub-tab. The **Ship To** tab displays.
3. To add a new address (typically the user's default address), press the **Select Addresses for Profile** button.
4. To select an address using the search interface, use the following steps:
    a. Enter text to search for the **Nickname** or **Address** fields. Determine the desired number of results for display by selecting a number from the **Results Per Page** drop-down box.
    b. Press the **Search** button.
    c. Select the radio button adjacent to the address desired for the current user ID.
    d. Review the information and make any necessary changes. Oftentimes this includes entering freeform text such as attention to, building, and/or room number.
    e. Check the **Default** checkbox if this address is the desired default Ship To address.
    f. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.
5. Press the **Delete** button to remove an address if the address was selected in error or if it is no longer needed.
6. Repeat the steps above to add any additional shipping addresses to the profile.
7. Select the **Bill To** tab.
8. Select a Bill To address by pressing the **Select Addresses for Profile** button. Follow the steps above to select a billing address. Note: The only difference in the steps is that billing addresses are being set up instead of shipping. Also, the format of Bill To and Ship To addresses may vary. For example, Bill To addresses typically do not have freeform rows.
9. When finished, there should be at least one Bill To and one Ship To address set up in the profile. It is recommended that one of each as marked as the default address. This will save time when checking out.

Setting up Custom Field Values

Custom fields are used to track customer-specific information such as department numbers, accounting codes, employee numbers, work codes, requisition type, and more. Accounting-related custom fields are used for accounts payable reconciliation and integration, GL updates, purchasing department processing, and similar functions.

Custom fields are used in SelectSite for a number of different reasons. They can hold information that is passed to another system (such as the organization's financial system), or they can track additional order details required by an organization such as buyer information.

Although custom field values can be selected or entered each time an order is placed, it is recommended to set up custom field values that are used repeatedly for ordering in the user profile. The time spent building custom field values in a profile is quickly made up by enabling quicker checkout by using default values.

Step by Step

The goal of this exercise is to review a user's permissions for custom field access and add custom field values to the user profile.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Review the user's custom field permissions:
    a. Select the **Permissions** tab, then select the **Custom Fields Permissions** sub-tab. This section of the user profile defines whether or not a custom field is visible for a user, along with how the custom field functions (freeform entry, user defined list, etc). The following permissions display for each active custom field in SelectSite:
        i) **View Personal List** – Allows view access to custom fields in the profile. Users will also see an Edit button that allows them to view or edit (depending on other Custom Field permissions) the list of custom field values.
        ii) **Edit Personal List** –Provides the same functionality as View Personal List PLUS the ability to add new values to the profile for the custom field. Depending on how the custom field is set up, this may be a selection from a pre-defined list (*requires View Organization Values Permission*) or by creating a free-form value (*requires Create Values for Personal list Permission*).
        iii) **View Organization Values** – Allows the searching and selection of organization-defined values for the custom field. This permission is used in conjunction with the Edit Personal List permission.
        iv) **Create Values for Personal List** – Provides the ability to create values (stored in the profile) for the custom field. This permission is used in conjunction with the Edit Personal List permission.

        Example # 1: For this custom field, the user selects from a list of admin-defined values to enter the account for a line item.

Account	
View Personal List	✓
Edit Personal List	✓
View Organization Values	✓
Create Values for Personal List	✗

        Example # 2: The user will not see this custom field on the purchase requisition/purchase order. He will not be able to see or change any information related to this field. The buyer field is only viewable by the Purchasing Department.

Buyer	
View Personal List	✗
Edit Personal List	✗
View Organization Values	✗
Create Values for Personal List	✗

3. Review and set up custom field values: Select the **Purchasing** tab, then select the **Custom Fields** sub-tab. This is the area of the profile where custom field values can be reviewed and updated. The sub-tabs displayed represent the location on the screen in which the custom field displays.
4. Locate the custom field you would like to add or modify the values for. Select the **Edit** button on that custom field's line. A highlighted error message displays if no default value has been assigned for that custom field. In some cases, it is recommended to define a default, but there are exceptions.
5. Review any custom field values currently listed in your profile for the custom field. Values may have been passed down by the assigned Role.
6. Select the **Create New Value** button to add a new custom field value or to select from a list of administrative values (this depends on the permissions discussed earlier in this exercise).
7. Select any available organization value from the **Values** list box, by enabling the checkbox(es).

8. Select the **Add Values** button once the desired custom field values are selected. The value(s) display in the Value/Description custom field value list box.
9. Modify selected custom field values using the following steps:
   a. Select the desired custom field value from the Value/Description custom field box.
   b. Modify the **Value** or **Description**, given the appropriate permissions.
   c. Select the **Default** checkbox if this custom field value is the desired default value.
   d. Press the **Save** button to save all changes.
   e. Press the **Remove** button to remove the custom field value from the list box.

SEARCH TIPS:

To search for organization defined values, use the Search button to retrieve a full list of values. A partial search can also be executed - part of the word or words you are searching for plus the asterisk (*) to perform a wildcard search.

10. Create custom fields manually, if the appropriate permissions have been granted, using the following steps:
    a. Select the **Create New Value** button.
    b. Enter a custom field value in the **Value** text box under the New Value section.
    c. Enter a custom field description in the **Description** text box under the New Value section.
    d. Select the **Default** checkbox if this is the desired default custom field value.
    e. Press the **Save** button to save all changes.
11. Select the **Close** button to complete editing the custom field values. Once this is done, other custom fields can be selected for edits.

NOTE:

Custom field values can be set up at the role level. Changes to a user profile override any role-level setup.

Setting up Accounting Code Favorites

A common type of custom fields is accounting codes such as funds, projects, organization codes, etc… Accounting code favorites allow users to easily save combinations of accounting codes that are frequently used in combination with one another. Users who buy for different projects or who split purchases across different codes can store these frequently used combinations on their profiles and quickly select to use them during checkout. Split percentages can also be saved with accounting code favorites.

Users can create an unlimited number of code favorites. Once an accounting code favorite is saved, it can be accessed and used from the cart during checkout.

Step by Step

The goal of this exercise is create accounting code favorites to store in the user profile.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Go to the Purchasing tab → Custom Fields sub-tab, then the **Code Favorites** sub-tab.
3. Click the **Add** button to set up a combination of values to be used for checkout. A pop-up window displays.

4. Enter the nickname for the account code favorite. This should be a recognizable name. For example: Bob's Codes, Standard Project Codes, etc…
5. Indicate by the **default** checkbox if this is your "standard" accounting code string that you would like defaulted in your profile.
6. Select the appropriate values. **NOTE**: The information that displays follows the custom field permissions of the user. For example, if a user does not have permissions for a code field, it will not be visible on the code favorites tab. Or if a user can only select values from the profile list, the user will be able to create code favorites from the profile list only.
7. Click the **Save** button.
8. To delete an accounting code set, click the **Delete** button. To edit an accounting code set, click the **Edit** button and make any necessary changes.

Determining Email Preferences

The Email Preferences screen is used to determine when and why the user will receive email notifications from the system. This information can be inherited from the role. Although notification can be enabled for each step in the process (submittal, review, approval, etc.), it is suggested that notifications be sent minimally when problems arise, such as line item rejection or when an email is returned to the requisitioner.

Step by Step

The goal of this exercise is to enable email notification for a user.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Select the **User Settings** tab, then select the **Email Preferences** sub-tab. The notification options listed are dependent on a user's permissions.
3. Determine in which cases you would like to receive an email. It is recommended to enable email notifications for rejections. To enable a notification that is not already enabled at the role level, enable

> **MORE INFO:**
>
> **Click on the name of the email notification to display Help, providing a full explanation of why and when the notification type is sent.**

the **Override Role** checkbox, then enable the **Value** checkbox. A green check displays for the notification.

4. Press the **Save** button to save changes. Emails will be sent immediately (as appropriate).

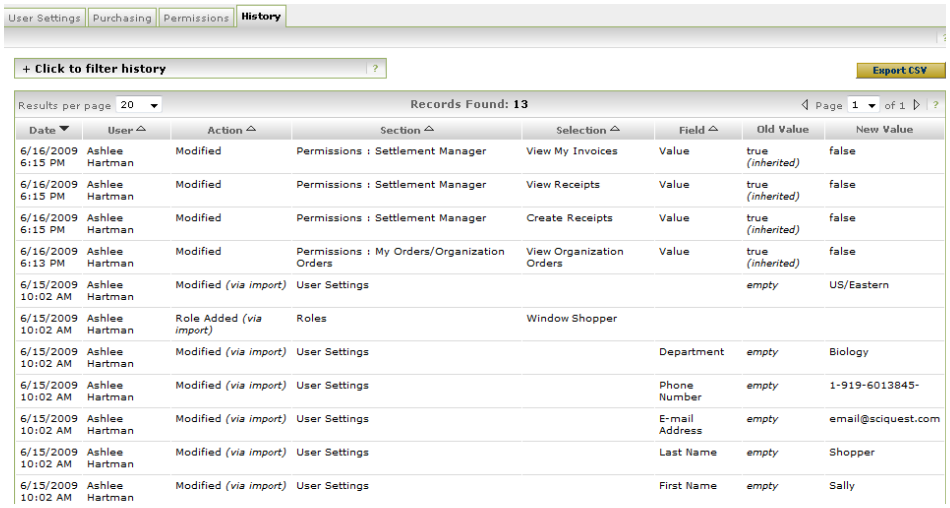
Review User Profile History

The User Profile History provides an audit trail that tracks changes made to a user's profile. This is an information-only screen that provides detailed information about potentially important changes such as changes to roles and permissions, approvers, addresses, and more. The History screens are used to track changes, additions, and deletions.

Step by Step

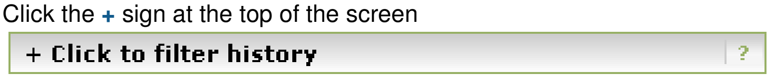
To view all changes, additions, and deletions related to a user's profile.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Select the **History.** The following screen displays.

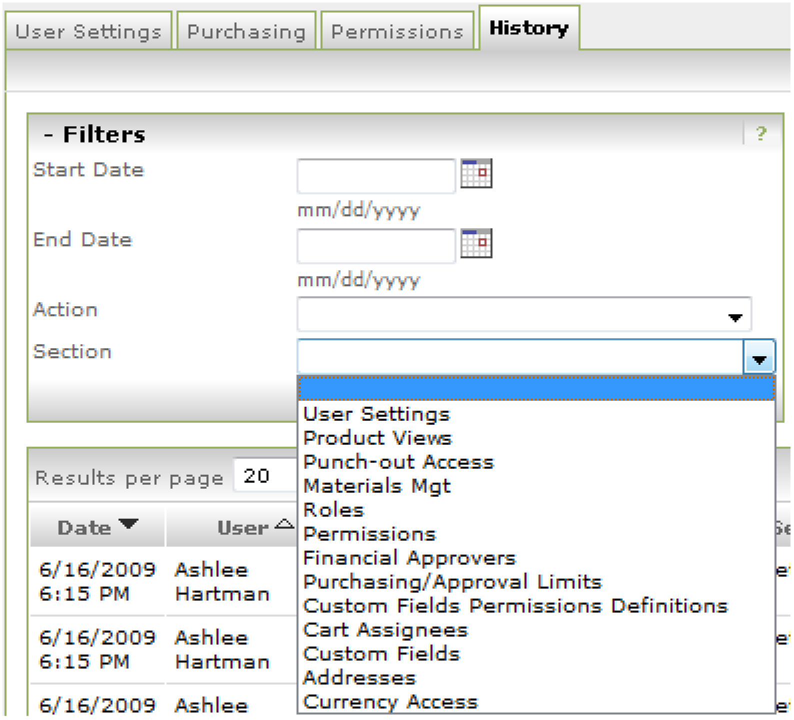


Date	User	Action	Section	Selection	Field	Old Value	New Value
6/16/2009 6:15 PM	Ashlee Hartman	Modified	Permissions : Settlement Manager	View My Invoices	Value	true *(inherited)*	false
6/16/2009 6:15 PM	Ashlee Hartman	Modified	Permissions : Settlement Manager	View Receipts	Value	true *(inherited)*	false
6/16/2009 6:15 PM	Ashlee Hartman	Modified	Permissions : Settlement Manager	Create Receipts	Value	true *(inherited)*	false
6/16/2009 6:13 PM	Ashlee Hartman	Modified	Permissions : My Orders/Organization Orders	View Organization Orders	Value	true *(inherited)*	false
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings			*empty*	US/Eastern
6/15/2009 10:02 AM	Ashlee Hartman	Role Added *(via import)*	Roles	Window Shopper			
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings		Department	*empty*	Biology
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings		Phone Number	*empty*	1-919-6013845-
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings		E-mail Address	*empty*	email@sciquest.com
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings		Last Name	*empty*	Shopper
6/15/2009 10:02 AM	Ashlee Hartman	Modified *(via import)*	User Settings		First Name	*empty*	Sally

3. Review the user profile history. The columns in the history table are described below:
   - **Date** - The date and time a change was saved.
   - **User** - The user who made the change.
   - **Action** - The type of action the user took. Typically either creating or modifying information for the user.
   - **Section** – The section of the user profile that the changes took place.
   - **Selection** – The area or value added. This field is not always applicable to a change.
   - **Field** - The specific field the user modified. This field is not always applicable to a change.
   - **Old Value** - The value prior to the change. This field is not always applicable to a change.
   - **New Value** - The value saved by the change. This field is not always applicable to a change.
4. The History tab provides the ability to filter the audit trail based on certain criteria. To filter the data displayed in the table:
   - Click the **+** sign at the top of the screen

   - Enter the appropriate filter criteria to determine what historical data displays, then click **Apply**. The historical data updates immediately.



SETTING UP CREDIT CARD INFORMATION

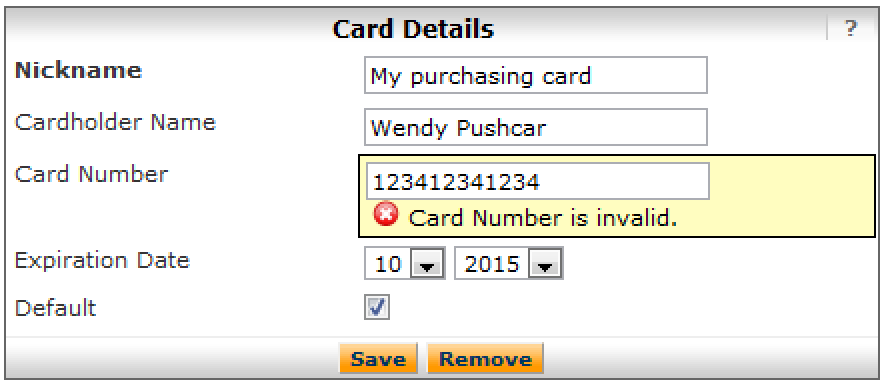
Some organizations use credit cards as a method of payment in addition to purchase order numbers. If your organization uses credit cards as a possible payment method and the *Edit Credit Card* permission is turned on for the user, the Payment Options section of the profile is available. From this section of the profile, you can set up credit card information so that it does not have to be entered for each order. The credit card number entered is encrypted, meaning it cannot be viewed after entered, but the system retains the information and can validate against the number. Information regarding credit card setup:

- Multiple Credit Cards can be set up. For each card set up, a card nickname, the cardholder name, the number, and the expiration date must all be entered. The three-digit code on the back of the card may also be required by your organization.
- By selecting a card as the default, all lines of an order will be assigned to the credit card. If a default is not selected, each line must be assigned individually in the shopping cart.
- Note: Credit Cards can only be used with items from those suppliers that have PCard set up as an ordering method.

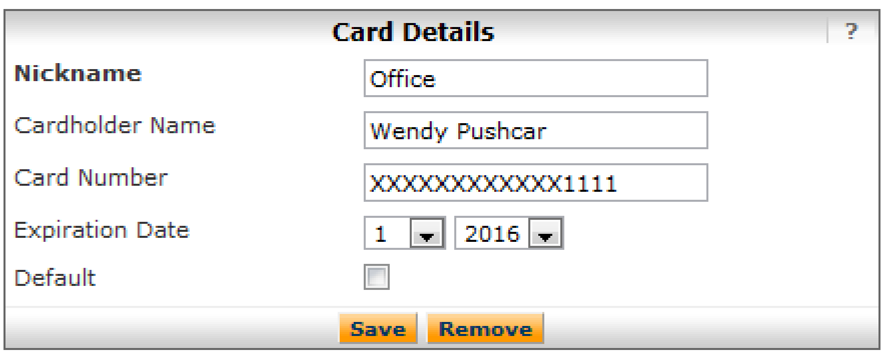
Step by Step

The goal of this exercise is to set up one or more credit card numbers for P-Card payment.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. Select the **Purchasing** tab, then select the **Payment Options** sub-tab. Any card numbers that have been set up display on the left side of the screen.
3. Click the **Add a Card** button to add a new credit card to your profile.
4. Enter the information for the credit card. If the card number is not valid, you will be notified (as shown in the graphic below).



5. Description of the fields on the screen:
   a. **Nickname** – This is an arbitrary name that identifies the card. For example, if you are someone that orders for multiple people you may have one called “Jim’s Card” and another called “Beth’s Card.” When selecting a credit card for use with a purchase order, you select from the nicknames assigned.
   b. **Cardholder Name** – This is the exact name that displays on the credit card. This is important that is matches the actual card because the supplier will use this for card validation.
   c. **Card Number** – The number on the card. This number will be initially validated by SelectSite and final verification by the supplier.
   d. **Expiration Date** – The month and year that the card expires. The expiration date must be past the current date in order to use the card.
   e. **Default** – This checkbox is used to identify the default card for the user. Only one credit card can be marked as the default.
6. Click **Save** to save the credit card information. After saving your information, it will look similar to the example below.



7. Turn on the **Apply the Default Card** checkbox to enable the default card.

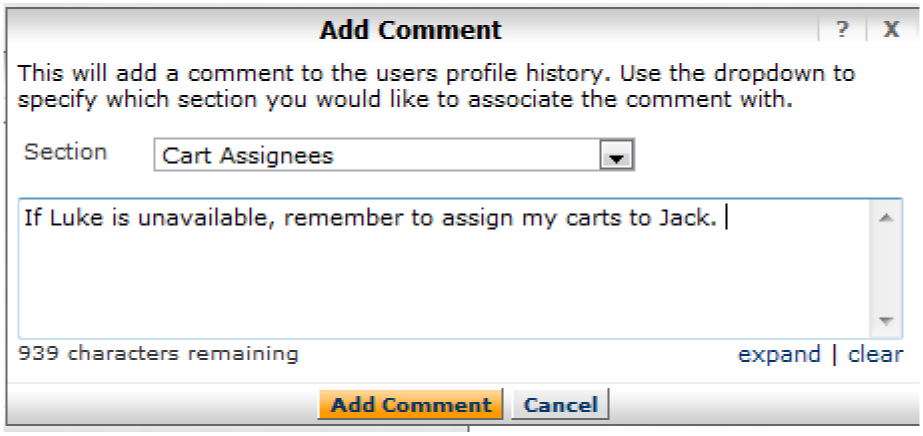
Add or View Comments on Your Profile

Users can add comments on their profile and this information can be viewed through the History sub-tab. For example, a user may want to add notes about their cardholder information, the permissions they were granted, shipping address, etc. Comments can also be added by administrators and can be viewed in the same fashion as user created comments.

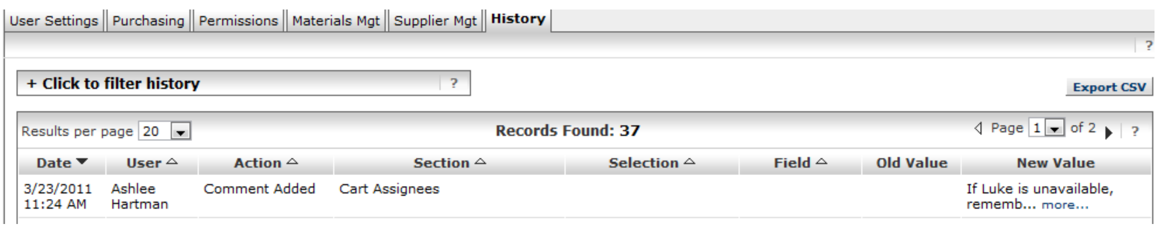
Step by Step

The goal of this exercise is for the end user to create a comment in his profile and view it once it is created.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 32 for more information.
2. From the upper right-hand corner of the screen, click the **Add Comment** button. The following pop-up window displays:



3. From here, select the **Section** of the user profile that the comment pertains to.
4. Enter the comment in the text box.
5. Click **Add Comment** to save the comment.
6. To view the comment, select the **History** tab. Comments are displayed in chronological order by default.



SEARCHING FOR ITEMS

Lesson 4: Search Methods

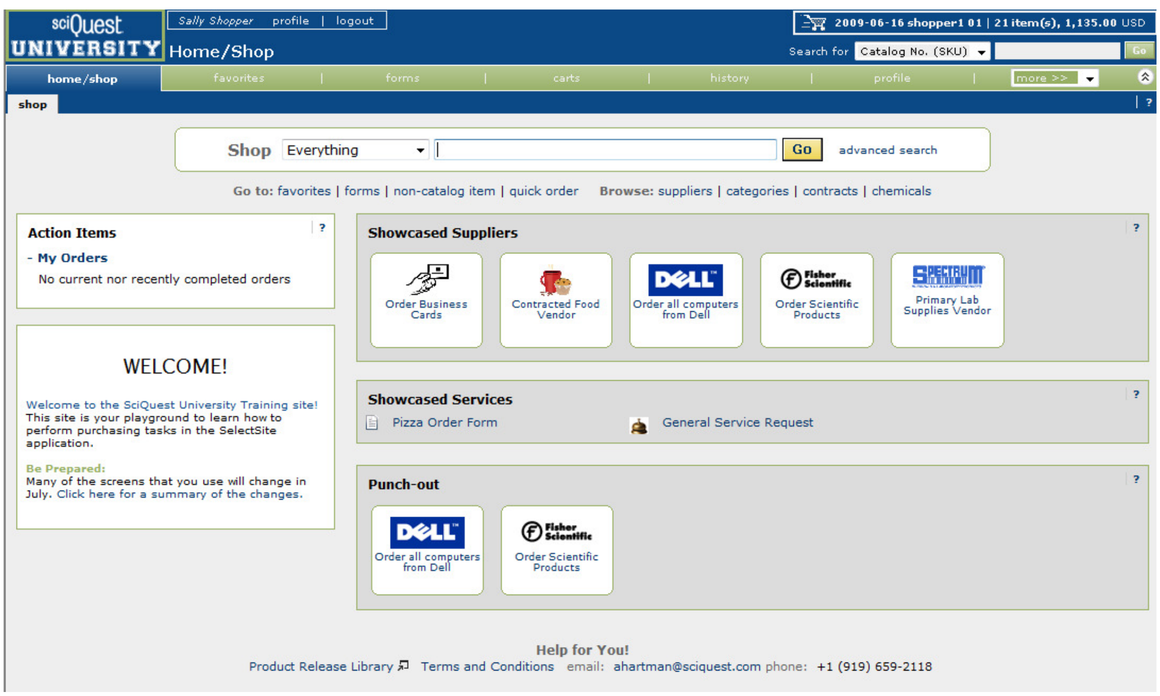
The purpose of this lesson is to provide instructions on the various ways in which you can search for items in SelectSite. Together, these search methods provide flexible, easy-to-use ways to find products to add to the Shopping Cart for purchase.

Key Concepts

Searching and Shopping Techniques

SelectSite provides several methods to find the appropriate items for requisitioning. In the screenshot below, a few of these methods are shown. For additional training on these shopping methods, including best practices of when each method should be used, visit the short training videos at the following location:

http://www.sciquest.com/web/mktg/featuresnippets.html



Depending on the information known about the required product or service, one or more of the following shopping methods can be used to search for the product or service:

- **Simple Search** – a simple search similar to a "Google" search, where a word, phrase or keywords are entered into a single text box for searching. Simple searches can be performed across all product verticals (as shown above) or for a specific product vertical. Simple search results in hosted and punch-out items, contracts, and forms access.

- **Advanced Search** – product description, product category, supplier name, manufacturer name, catalog number, manufacturer's number and other key product descriptors can be used to find the required product or service. Simple search results in hosted and punch-out items, contracts, and forms access.
- **Shop by Showcased Suppliers** – An organization can highlight, or "showcase" suppliers that are either frequently used, recommended, or offer a good discount.
- **Shop by Showcased Services** – An organization can highlight, or "showcase" forms that are frequently used.
- **Non-catalog Item Entry** – Allows users to order items not available via hosted or punch-out suppliers.
- **Browse by Supplier** – filter results to those from a specific supplier.
- **Browse by Category** –view all items from all suppliers for a specific category (commodity).
- **Browse Contracts** – this option is available to those clients who have purchased the Contract Manager module. This option allows you to search for items or keywords for the contracts managed in the system.
- **Punch-out Shopping** – search an external supplier's website, to find the required products for purchasing. Items are returned to the SelectSite shopping cart for processing.
- **Chemical Structure Search** –commercially available chemical products are found using chemical structures and sub-structures drawn by the user.
- **Antibody Resource** – parametrically search for antibody products by selecting host, species reactivity and other product attributes.
- **Quick Order** – if the exact catalog number is entered (supplier of manufacturer), Quick Order automatically adds the item to the cart without requiring the user to add the item manually.
- **Favorites** – store frequently ordered and preferred items in an organized personal manner for fast retrieval and requisitioning.
- **Forms** – The non-catalog form or a specific form such as a "Services Form" is used to freeform a request for an item or service.
- **Product Comparison** –view side-by-side comparison of similar items to compare item details to make more informed.

Punch out and Hosted Catalogs

A catalog is a supplier's product offering. There are two types of catalog hosted and punch out. These are described below.

- **Hosted Catalog** –In simplest terms, a hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When a product search is performed in SelectSite, the products in all of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the user.
- **Punch-out Catalogs** – Punch-out catalogs are integrated external links to a supplier's web-based catalog. The user exits SelectSite to search and select products from a supplier's web catalog, then returns the items to the SelectSite shopping cart. The selected items are then submitted through the standard requisition/order process.

Search at a Glance

In SelectSite, there are many different options and features available for product searching. While it is **highly recommended** to review all the information in this document to gain the highest level of understanding around search, we realize this is not always possible. Here are some recommended alternatives:

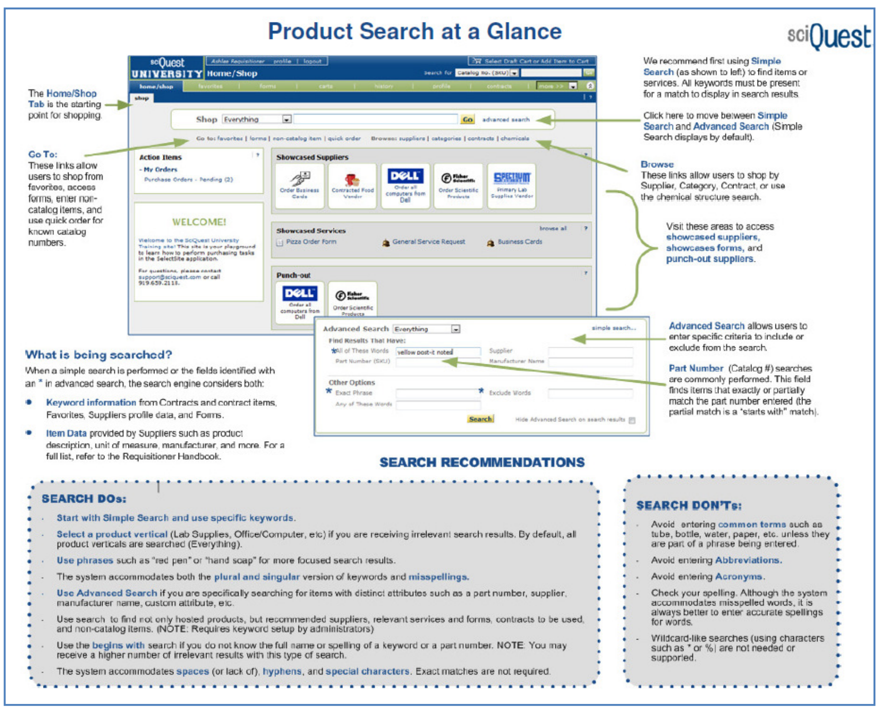
Quick Learning…

If you have 10 minutes, do the following:

1. Read the **What's on the Screen? Understanding Product Search** found on the following pages. This will provide a detailed understanding of how the search engine works.
2. Read **Searching Recommendations** starting on page 62. This is one page of helpful hints and advice around successful searching.

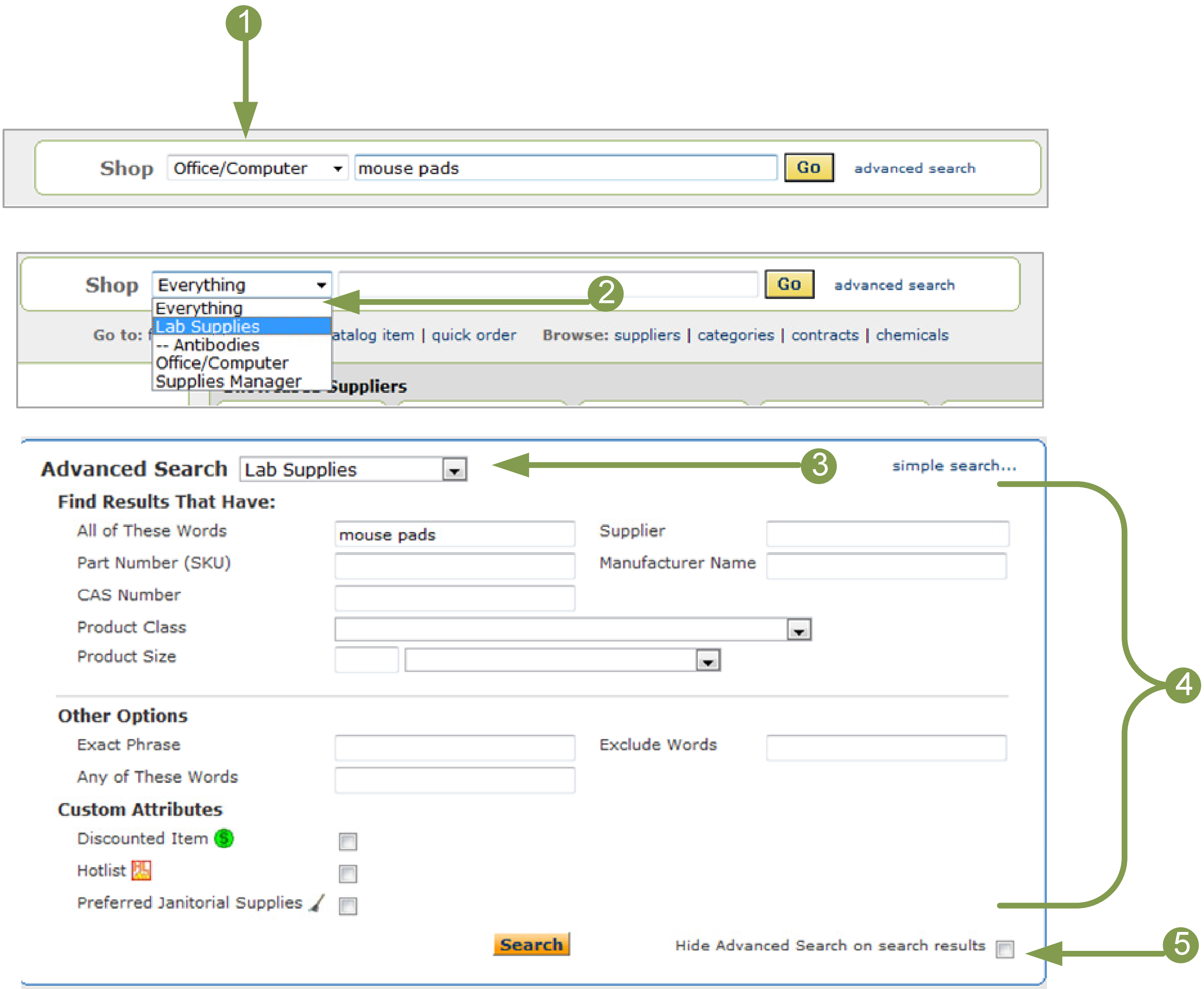
Quickest Learning…

If you have 5 minutes, read the two-page document: **Product Search at a Glance**, which is available from SciQuest Support (shown below).



WHAT'S ON THE SCREEN? UNDERSTANDING PRODUCT SEARCH

In order to return the highest quality search results, it is important to understand the different options available through **Simple and Advanced Product Search**. Each of the "parts" of the search screens are described on the following pages. Below is a graphic of the product search accessed from the home/shop tab, presented a few different ways. Refer to this graphic when reading through the descriptions.



1: Simple Search

There are two primary ways that a user can search for a product in SelectSite. A simple, or **basic search** is provided that provides a "Google-like" experience, which is shown in the graphic above as item # 1. Simple Search displays upon login. When using simple search, it is recommended to select a product vertical. By default, the search will occur across all product verticals (Everything is selected). All of the words entered in the keyword textbox must be found in the items displaying in the product search results. After entering the keywords, click the Go button or press the Enter button on your keyboard.

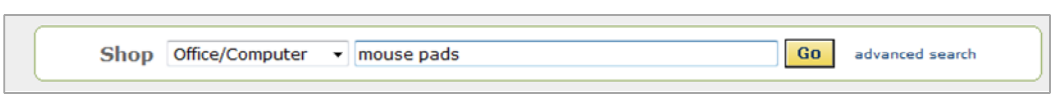
When a simple search is performed, to find the most relevant search results, the system many different things, including:

- **Keywords:** Keywords are entered by system administrators to help guide users to the correct contract, form (service), supplier, and favorite items.
- **Item Information**, which is typically provided by the supplier, including:
    - Product Description
    - Product Category / Sub-Category
    - Supplier
    - Manufacture Name and Manufacturer Part Number
    - Unit of Measure / Product Size
    - System Packaging and Size
    - Alternate Name and Alternate Part Number(s)
    - Client Catalog #
    - Color
    - Common Name
    - MDL Number
    - Molecular Formula
    - Radionuclide
    - UPC

2: Product Verticals

Many different types of items can be ordered through SelectSite – ranging from chemicals for the lab, furniture for the office, and services from vendors. To help users find the item or service requested, category-specific searches are available. To the right of the word **Shop** in simple search and Advanced Search in advanced search, a drop-down box displays. This list includes all of the product verticals available at your organization. Below are a few key details about verticals:

- Searching by vertical helps reduce the number of products from appearing in Search Results by filtering out those not in the selected vertical. When shopping by category – or product type –the data being searched is limited.
- The list of verticals available varies by organization depending on the suppliers and items enabled. For example, if only office product suppliers are used, only the Office Products vertical appears. As other types of products (and suppliers) are added, more verticals are displayed on the screen.
- The active vertical is listed in the field, as shown below.



- SciQuest recommends performing vertical-specific searches as a first step, then moving to the Everything option if the item is not found. The search works quite differently within each category; therefore the results are typically much better when a vertical, or category, is specified.

- Below is a description of each of the product categories available in the system.

Product Vertical	Description and Examples
Lab Supplies	This category includes products used in various research environments. Examples include items such as these and more: ▪ reagents (used in synthesis/analysis, cell/molecular biology etc), ▪ glassware, ▪ analytical equipment, meters, and supplies ▪ safety and cleaning supplies
Office	This category includes office supplies and consumables such as: ▪ files and folders ▪ desk supplies ▪ packing and shipping supplies ▪ paper and printing supplies ▪ writing instruments ▪ blank media
MRO/Facilities	This category includes products related to maintenance repair and operations (i.e. – facility management). Examples include: ▪ electrical, lighting, and air conditioning supplies ▪ plumbing supplies ▪ tools ▪ hardware ▪ lubrication ▪ janitorial/ground maintenance supplies
Furniture	This vertical includes all furniture products such as: ▪ Desks and tables ▪ Workstations ▪ Cabinets ▪ Chairs ▪ Shelving ▪ Office Furnishings such as lamps, etc
Services	This vertical includes all service-related requests (i.e. – instead of product/item requests, these are service requests). Service examples include: ▪ Lab services ▪ Office and project management services ▪ Legal services ▪ Training services ▪ Catering services ▪ Manufacturing services

Product Vertical	Description and Examples
Manufacturing/Engineering	This category typically includes major equipment purchases such: ▪ Construction equipment ▪ HVAC equipment ▪ Water treatment equipment ▪ Pharmaceutical equipment
Books and Publications	This category includes hardcopy documentation spanning all topics and interests. Items in this category include: ▪ Books ▪ Manuals ▪ Reference Publications ▪ Magazines
Electronics/IT/AV	This category includes all electronic or computer-related equipment including: ▪ computer hardware/software ▪ computer accessories ▪ printers/copiers/scanners ▪ communication equipment/accessories ▪ AV equipment/accessories ▪ networking equipment/accessories
Specialty	This category includes miscellaneous products such as: ▪ Sporting equipment and supplies ▪ Clothing materials ▪ Hobby and entertainment related items ▪ Teaching and classroom aids ▪ Musical instruments ▪ Toys and games
Food/Food Equipment	This category includes all food-related items such as: ▪ Commercial food preparation, storage, and serving equipment ▪ Food consumables and supplies ▪ Food items (meats, vegetables, juices, beverages, snacks, etc) ▪ kitchen equipment and utensils

Product Vertical	Description and Examples
Medical / Clinical Supplies	This category includes medical, surgical, clinical, and dental products such as: ▪ gauze, needles ▪ dental equipment ▪ hospital equipment NOTE: The items in this vertical were previously in the Lab Supplies vertical.

3: Advanced Search

Advanced search allows users to enter additional criteria to generate more specific search results than with simple search. The search criteria available depends on the product vertical selected and whether or not the organization uses custom catalog attributes. By default, once advanced search is opened after login, it will remain open with subsequent searches.

To access advanced search, click the **Advanced Search** link from simple search.

4: Search Criteria Options (in Advanced Search)

Proper usage of the search criteria fields makes a huge difference in terms of the quality of search results. Users should take the time to understand how each of these fields work.

In addition to the fields listed in the following table, organizations can set up specific attributes that users are allowed to search against. These are called **custom catalog attributes** and allow shoppers to search for specific types of items – such as discounted items, items that are on sale, or search by internal IDs.

Fields Available in Advanced Search: The search criteria fields available on the screen vary based on the category selected. For example, CAS is only available for Lab searches.

Search Criteria Field	Description
All of These Words	All of These Words function just as the Simple Search does. Only products containing **ALL the words** entered in this field are returned in search results. The words do not need to be in the same order as listed, but all words must be found in the item data or keyword data. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.

Search Criteria Field	Description
Part Number (SKU)	Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributors SKU or the manufacturer SKU. For best results, the entire SKU should be entered. A partial match on part number returns the closest matching or similar results. This is a begins with match and at least four characters must be entered. If multiple strings of text are entered (i.e. “123 456 789”) then all components of that string must be present in the part number for the item to be returned. For example if “123 456 789” is entered into Product Search, the part numbers “123-456-789” and “123-456-789-000” would be returned, and “123-456” would not. When the Part Number field is used as part of the search criteria, only those fields related to the Part Number for items are searched. This includes Supplier Part Number, Manufacturer Part Number, Alternate Part Number, Client Catalog Number, and Custom Catalog #.
CAS No.	This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. Note: The entered CAS No. is checksum validated to reduce errors.
Product Class	This field is only available for Lab supplies and provides a more detailed level of categorical search.
Product Size	Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL. This is available only in the Lab Supplies category.
Supplier Name	Enter the beginning or a supplier’s entire name to find products from all suppliers that include the terms as part of their name, or begin typing and select from the drop-down list of suppliers to see products from a single specific supplier. When the Supplier Name field is used as part of the search criteria, only the supplier name is searched.
Manufacturer Name	To find products from a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to SciQuest. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.
Exact Phrase	Products containing the **exact words** in the ordered entered are returned. This is a very powerful search strategy if you know the precise way in which a supplier presents its information. If you are unsure – and looking for results from multiple suppliers - it is recommended to use *All of These Words* option instead. For example, Large Gloves will find products with *Large Gloves* in the product description but will not find *Gloves, Large*. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.

Search Criteria Field	Description
Exclude Words	Products including **any of the words** entered in this field are **excluded** from Search Results. Another search field must be used when using the exclude function. For example, you may be looking for all glove options that are not small or medium. You could enter latex gloves in the *must include the words* field and small medium in the *exclude the words* field. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.
Any of These Words	Search results will include products containing **any of the words** entered in this field. Products containing more than one word appear higher in search results than products with only one. Keep in mind, the search results will not be as targeted as using the *must include the words* field. For a full list of fields that are considered when this field is used, refer to **#1:- Simple Search**.

5: Hide/Show Advanced Search

Enable the **Hide Advanced Search on search results** checkbox if you would like the advanced search box to collapse and show the simple search after displaying search results.

UNDERSTANDING SEARCH RESULTS

Search results display when performing searches in SelectSite. The actual contents of the search – or result set – is determined by what is being searched and what type of search is performed (simple search, search by supplier, etc). The purpose of this section of the document is to provide general information about usage and formatting of the search results.

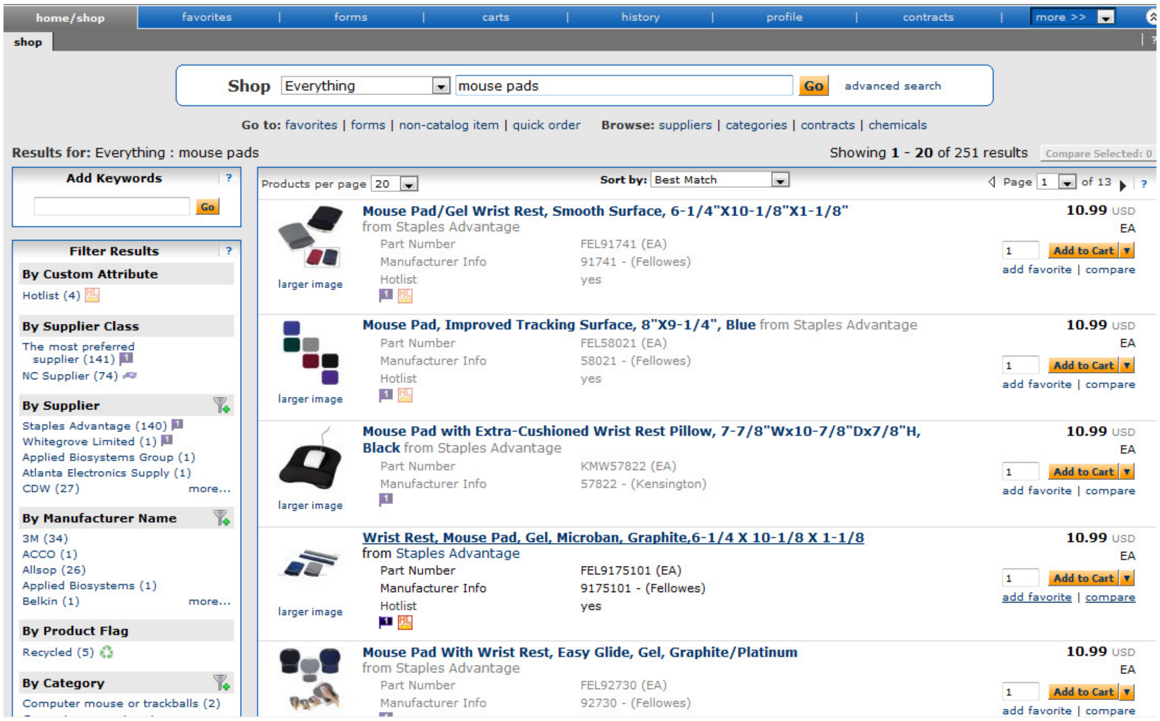
Search results display different types of shopping results, including hosted and punch-out items, links to punch-out suppliers, along with recommended forms and contracts. **NOTE**: Setup is required by an administrator or the supplier in order for different item types to display other than hosted supplier items.

What is being searched?

When most searches* are performed, the search engine considers the following:

- **Keyword information** from Contracts and contract items, Favorites, Suppliers profile data, and Forms. This information is set up by system administrators and is designed to direct end-users to the right items or services for purchase
- **Item Data** provided by Suppliers such as product description, unit of measure, manufacturer, and more. For a full list of item data being searched, refer to the explanation of # 1: Simple Search on page 53.

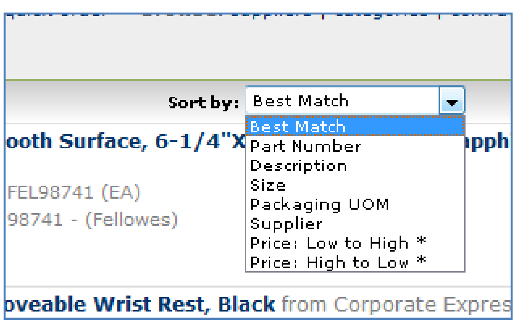
The graphic below provides a sample of search results that displays after search criteria is entered.



Search Results Details and "How to's"

Search Results display below the simple and advanced Search. Below are detailed explanations for the Search Results user interface:

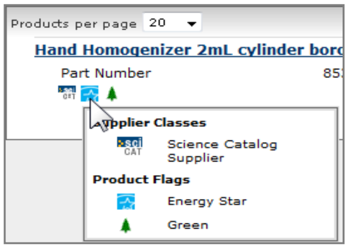
- **Search Listing**. By default, items and recommended services, suppliers, etc… are presented in the Best Match order (more info in The Order of Search Results on page 60). Hosted products are displayed with an image (if available), along with product description and product detail information. Form recommendations, contract recommendations, and punch-out items can also be accessed from the search listing.
- **Sort By:** After the search is performed, a user can choose to re-sort the data by part number, product description, price, and more. For more information, refer to Sorting Search Results on page 81.



- **Refining the Search through Keywords.** SelectSite allows you to filter the search results by adding additional keywords into the Add Keywords field, found on the left side of the screen. For more information, refer to Refining Search Results on page 80.
- **Refining the Search through Filters.** SelectSite allows you to filter the search results by selecting specific suppliers, product categories, supplier classes, manufacturers, units of measure, result types (product, punch-out item, etc), product flags (green, energy star, etc), or custom catalog attributes. These filter options are found on the left side of the screen on a search is performed.

NOTE: Not all filter options are available for every search and some organizations choose to disable some of the filter options. For more information, refer to Refining Search Results on page 80.

- **Icon Definitions.** Both supplier classes and product attributes are identified with icons below the product description. An item-specific legend it provided for product flags and supplier classes. Mouse-over any of the icons for the legend to display (as shown below).

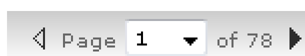


- **Adding Items to Your Cart.** To add an item listed in Search Results to the shopping cart, click the **Add to Cart** button. By default, the quantity is one, but it can be updated to order more. NOTE: Some organizations and some supplier support partial quantities for ordering of goods and services. For example, you can order 1.5 hrs of service from a consultant. If your site is set up in this manner, enter the whole or decimal number in the quantity field.

- **Adding Items to your Favorites.** You can also add items from your search results to your favorites. For more information, refer to Adding Favorite Items to your Cart on page 90.

- **Comparing Items in Search Results**. From the search results, product details can be compared for to determine which one should be ordered. For more information, refer to Using the Comparison Function on page 82.

- **Access Additional Pages and Changing Items per Page.** To change the number of items displaying per page, select the appropriate option from the Items per page drop-down at the top and bottom of the search results. To view items on a different page, use the arrow buttons or enter a specific page number. To page through search results, use the arrow buttons or page entry field to go to a specific page of search results. This information is displayed above and below the search results.



The Order of Search Results

A common question from users is: *"What determines the order in which products and services are returned in search results?"* There are numerous factors that dictate the order in which products are returned within Search Results. The search engine determines the initial sort based on keyword relevance. Preferences – such as preferred suppliers and favorite items determine the final listing.

The search engine finds all the products and recommended forms, services, and contracts that should be considered for search results. Products with the greatest number of matching words are ranked higher than those with fewer. For example, if four words were entered as keywords in Simple Search, the product s and services containing all four are ranked higher than those containing three.

What is Keyword Relevance?

The relevance weighting calculated by the search engine is the primary factor for determining the product order in search results. Products with the highest relevance are presented first. Products with the second highest relevance are returned second, and so forth. Products with the same relevance are sorted alphabetically by supplier name. Products with the same relevance and supplier have no predefined sort order.

How do Categories affect Keyword Relevance?

The relevance calculation is most accurate and effective when a category (vertical) is selected when using Simple and Advanced Search. By default, the "general" category (Everything) is selected, but it is highly recommended to select an appropriate category (Lab Supplies, Office Supplies, etc) to reduce the number of irrelevant results.

How do Organization-Specific Preferences affect Search Results?

After the search engine identifies the initial order of items and services to be presented, which is based on Keyword Relevance (described above), organization-specific preferences are considered.

Preferences include various functionality in SelectSite, all of which is optional and may or may not be used by your organization. Preferences that affect search results include:

- **Custom Catalog Attributes**, which are also called CCA, allow organizations to "tag" items with organization-specific attributes to direct the user to these items. For example, an organization may mark certain items from suppliers as "Hot List" or "Great Buy." Custom Catalog Attributes are identified by an icon shown with the item description. Additionally, search results can be filtered by Custom Catalog Attribute ("Show me all Hot List Items").
- **Supplier-Category Preference** – System administrators can assign a preference from 1-10 to a specific supplier for specific category of items. For example, ABC Supplier is your primary vendor for desks, therefore they would be tagged for this specific item category. Supplier-Category Preferences are identified with a 1-10 icon, which displays in product details as shown here:
- **Supplier Class Preference** – System administrators can assign preferences to a specific supplier by using supplier classes. Most, but not all, suppliers with a preference assigned (from 1-10), are also assigned an icon to visible indicate the preference. Some examples of supplier classes are *Local Supplier*, *Minority Owned Business*, *#1 Supplier*, etc… Supplier classes are assigned at the overall supplier level – not for specific items or item categories. Sample icons:
- **Shared Favorites** – This includes items and forms designated as a favorite for the entire organization or those designated for certain groups, such as departmental favorites. Shared favorites are identified by this icon to the left of the Add to Cart button:
- **Personal Favorites** - This includes items and forms designated as a favorite at the user level. These favorites can only be viewed and accessed by the user. Personal favorites are identified by this icon to the left of the Add to Cart button:

Detailed Look at Order of Search Results

For the average user, understanding that the search results are derived from the keywords entered, then preferences, is sufficient. Below is a detailed explanation of the search results order:

1. **Keyword Relevance** determines what group of items displays first, then second, etc… This is the most important criteria in determining search results order. Relevance is grouped by weighting (as described above). Within each grouping, the items are organized based on the preferences described in #2 below. The ranking for keyword relevance is listed below:
    a. **Exact match on Part Number.** Many of the searches performed are on part number, which is also called Catalog # or SKU search. An exact match on this will send an item to the "top of the list."
    b. **Exact match on Product Description.** If all of the keywords entered are found in the Product Description for a hosted item, it displays second.
    c. **Exact match for Supplier, Manufacturer, Category, Packaging, and Keywords** displays next. With the exception of keywords, this information is all derived from catalog (item) data provided by the supplier. Keywords are searched against information set up by administrators including:
        - Contract keywords (to recommend contracts to use)
        - Contract Items (to recommend specific items on contract)
        - Form keywords (to identify recommended services or forms to populate)

- Supplier Keywords (entered in supplier profile to direct users to shop with supplier for certain goods/services)

NOTE: For exact matches, the search engine allows for hyphens, spaces, and special characters. For example, it will consider ABC 123 an exact match for ABC-123.

d. **Partial match on Part Number.** If the user enters a component – or part – of the Part Number – these items are returned next in search results. For example, a user may enter EA12 and the search results may include Part Numbers of EA123, EA124, EA12556, etc.

e. **Flexible match on Product Description.** Flexible match is different than a partial match in that it doesn't have to be "exactly" like the description. For example, misspellings are accommodated, part of words, etc.

f. **Flexible match on Supplier, Manufacturer, Category, Packaging, and Keywords.** All items with a flexible match to the fields listed above (both from item data and administrator setup), display next.

2. **Preferences** determine the order of items within relevance grouping. The ranking for preferences is listed below:

   a. **Custom Catalog Attributes**

   b. **Supplier-Category Preference**

   c. **Supplier Class Preference**

   d. **Shared Favorites**

   e. **Personal Favorites**

Searching Recommendations

The purpose of this section is to provide general recommendations for searching and background information on "how" the search engine works. Recommendations include:

Search Do's:

Below is a list of recommendations in terms of "good things" to do when searching:

- Start with **Simple Search** and use **specific keywords**.
- Select a product vertical (Lab Supplies, Office/Computer, etc) if you are receiving irrelevant search results. By default, all product verticals are searched (Everything). The search works quite differently within each category vertical, therefore the results are typically much better when a vertical is specified.
- Use **phrases** such as "red pen" or "hand soap" for more focused search results.
- **Plural Usage.** The search engine is designed to handle plurals and non-plurals, and will display the same search results in either case. For example, the search engine does not care if you type in "battery or "batteries."
- **Punctuation and Spacing**. For the most part, the search engine is able to ignore punctuation such as hyphens, dashes, and other miscellaneous characters. For example, you should get the same, or very similar results if *ABC-123*, *ABC123*, and *ABC / 123* are entered.
- **Your supplier data is a key factor in determining search results.** The search results ultimately depend on the number of items and suppliers enabled. As an administrator, make sure the "right" suppliers and "right" items are available to your end users or communicate to them otherwise. Here is an example of how varying supplier data affects search results: *123* is entered in the Catalog # field. In the search results, an item with a Catalog # of *123456* may display on one site but not another – perhaps because there are more items that more closely match the criteria based on the number of items available.
- **The more information, the better.** Many users become frustrated due to the large number of results, but are not entering enough specific information to produce quality results. If you know the

supplier or manufacturer, enter those details. If you know the size of the product, enter that. The more information you enter, higher quality results are produced.

- **Misspellings**. The search engine is designed to accommodate misspellings. For example, misspelled “dispensirs” will return “dispensers” or “dispensing” (et al) in the results
- **Product Size Searches** – The Unit of Measure is provided by the supplier. If the UOM entered by the requisitioner/shopper is slightly different, the system will accommodate these variations. For example, if *100 ml* or *100 milliliters* or *100ml* is entered, very similar results display.
- **Try other search techniques.** If you cannot find your item through traditional product search (simple or advanced search), consider looking for the item using various other search techniques including Browse by Supplier, Browse by Category, Quick Search, and more.
- Use **Advanced Search** if you are specifically searching for items with distinct attributes such as a part number, supplier, manufacturer name, custom attribute, etc.
- **When using Advanced Search, understand the search criteria options.** It is imperative that you understand how each of the search fields work on the screen so that you can select the appropriate fields to use for your search. Refer to the What’s on the Screen? Understanding Product Search on page 52 for more information.
- Use search to find not only hosted products, but recommended suppliers, relevant services and forms, contracts to be used, and non-catalog items. (NOTE: Requires keyword setup by administrators)

Search Don’ts:

Below is a list of things that do not work well when searching:

- Avoid entering c**ommon terms** such as tube, bottle, water, paper, etc. unless they are part of a phrase being entered.
- Avoid entering **Abbreviations.** Abbreviations are only recognized if provided by the supplier.
- Avoid entering **Acronyms**. Acronyms are only recognized if provided by the supplier.
- Check your **spelling**. Although the system accommodates misspelled words, it is always better to enter accurate spellings for words.
- **Wildcards** such as asterisks (*) do not work and are not needed.
- **Weighting is not affected by recurring word usage.** For example, if a supplier puts the word Glove three times in the product description and once in the Product Name, it will not increase its chances of displaying at the top of the list.

What Next?... I didn’t get the results I needed

After the initial search results, refine your search by:

- **Adding more keywords** (to the top of the screen or on the left-hand side.)
- **Filter by one or more attributes** (by supplier, category, UOM, etc). Filter options are found on the left side of the screen.
- Use **Advanced Search** if you are specifically searching for items with distinct attributes such as a particular part number, supplier, manufacturer name, custom attribute, etc.
- **Sort the data** a different way – by part number, price, description, etc… Options in drop-down above search results.
- **Search for a part number across all suppliers** by clicking on a Manufacturer Part Number in the search results (Manufacturer Info).
- **Think of other ways to “say” the same thing.** For example, instead of searching for Kleenex, search for tissues, instead of searching for lunch, shop for catering, etc...

Recommendations for Administrators

Administrators and Trainers can do a few things to assist their end users with product **Searching**. Some of these suggestions are listed below:

- **Create a cheat sheet –** Use the information in this document to create a quick guide for your end users. Make this document or pdf available from your Organization Message. Training links are highly recommended from the home page.
- **Train users with examples**- Using your suppliers and the data available to your users, provide real-world search examples in training. Show examples of how using the search criteria fields and basic vs. advanced search make a huge difference in terms of search results.
- **Use Help –** Click the  button on the right side of the Product Search tab for a description of each of the search criteria options and fields. Additionally, you can click on most of the fields to access field-specific Help. It is also recommended that you add organization-specific tips to the Help to best guide your users. For example, if you want to educate your users on how to shop for items from a specific supplier, you can add this to the Help and everyone can view these tips.
- **Shared Favorites –** Create Shared Favorites for frequently ordered items or items that are recommended for purchase. For example, if you have a standard item for white 8 X 11 paper, add this to the Office Supplies org favorite folder. Users can select this item instead of searching for the "best" item to order. It is also important to educate your users about org-wide and departmental (shared) favorites during training.
- **Use the Terms and Conditions Popup for Tips and Tricks. –** During training, participants typically only absorb 60% of the information they are taught. In addition to standard ongoing training sessions, use the system to teach your users. SelectSite provides a popup window that displays at sign-in. This pop up can be used for standard purposes– such as disclaimers and site usage agreement, but it can also be used to tell your users about cool new features or remind them of tips and tricks for searching. The users are forced to view the information presented to access the information and will not required to view it again until the administrator resets the function. Refer to the Advanced Admin Guide for more information on setting up Terms and Conditions.
- **Use Searchable Keywords for Suppliers, Forms, and Contracts –** To draw attention to suppliers – hosted or punch-out, use the Searchable Keywords field, which is found in the Supplier Profile to help guide users. For example, if you use a punch-out vendor for computer purchases, allow the user to display in search results and enter different keywords that users would enter (new PC, laptop, computer, desktop, etc). You can do the same thing for forms – or services – to highlight and contracts.
- **Work with SQ and your suppliers if your users are still struggling**- Lastly, if you or your users are still struggling understanding the search results that are displayed or "why" you cannot find what you are looking for, contact SciQuest Customer Support for assistance

Exercises

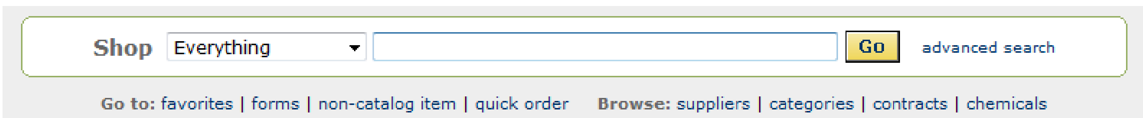
USING SIMPLE SEARCH (SHOP AT THE TOP)

There are two main types of searches in SelectSite: simple search and advanced search. When a user first logs in, the simple search displays. Simple searches can be performed across all product vertical (the default setting), or the user can select a product vertical such as Lab Supplies, Office Supplies, etc.

Step by Step

The goal of this exercise is to demonstrate how to perform a standard (simple) search for an item in SelectSite.

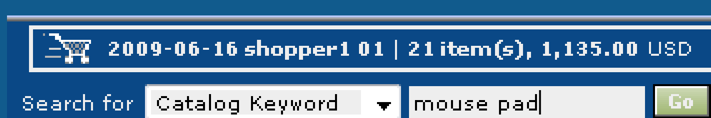
1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. By default, the simple search displays when logging into SelectSite. After that, SelectSite remembers whether or not simple or advanced search is being used. An example of a simple search window is shown below.



3. To the right of the word Shop, select the **product vertical** or keep the Everything vertical selected, which searches across all products.
4. Enter the **keyword** or keywords you are searching for in the box. <u>Keep in mind, the more information you enter, the more specific your search will be.</u>
5. Click the **Go** button to view search results.
6. If the search results do not provide the information you need, perform an advanced search or refine your search, as discussed on page 80.

QUICK ENTRY BOX:

Simple searches can also be performed via the Quick Entry box in the upper right-hand corner of the screen. Choose Catalog keyword (as shown in the example below) or Catalog No., then click Go or hit Enter to quickly see the search results.



USING ADVANCED SEARCH

The purpose of this exercise is to demonstrate how the search criteria fields are used and how they impact product search results. When keywords are entered into a search criteria field, SelectSite searches the products available in hosted catalogs to find the best matches. The various search fields filter Search Results to include only the desired products.

Keyword searching can be performed within any product vertical where hosted catalogs are available. The fields available vary depending on the type of item being searched. For example, although all verticals have the *include any of the words* field, you can only search by *CAS #,* which is an identifier specific to chemicals, in the Lab Supplies vertical.

NEED HELP?

Help on using each of the search fields is accessed by clicking on the search field name.

Step by Step

The goal of the exercise is to find the desired products using the search criteria fields available through Product Search.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. By default, the simple search displays when logging into SelectSite. Click **advanced search...**
3. The fields that display in advanced search depend on the product vertical selected and any customer catalog attributes used at your organization. **Select the product vertical**. The system will remember the vertical if a previous search was performed and you have not moved away from the shopping screens.
4. In the **Find Results that Have:** section, the following options are available:
    a. **All of These Words** - Only products including all the words entered in this field are returned in search results.
    b. **Supplier Name** - Enter the supplier name or information in the Supplier Name field. As you begin typing the AutoComplete/Type-Ahead functionality will display. The supplier search allows for a "contains" name search. For example, if a supplier search is performed on "Grainger," "WW Grainger, Inc." will be returned in the results. The following fields are considered:
        - Supplier Name
        - Supplier defined Alias
        - Supplier Number
        - SciQuest ID
        - Third Party Reference Number
        - Commodity Code

        NOTE: Supplier Name and Supplier defined Alias use the "contains" search functionality. Supplier Number, SciQuest ID, Third Party Reference Number, and the Commodity Code are all complete match searches and display with associated preference icons.
    c. **Part Number (SKU)** - Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributors SKU or the manufacturer SKU. To search for multiple catalog numbers, enter them separated by spaces. For best results, the entire SKU should be entered. A partial match on part number returns closest matching or similar results (this is a "begins with" match).
    d. **Manufacturer Name** - To find products produced by a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to SciQuest. This field can also be left blank. Enter multiple manufacturer names to limit results to a set of certain manufacturers.
    e. **CAS No.** - This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. Note: The entered CAS No. is checksum validated to reduce errors.

f. **Product Class.** – Users can select from sub-categories for lab supplies.

g. **Product Size** - Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL. This is available only in the Lab Supplies category.

5. In the **Other Options:** section, the following options are available:

   a. **Exclude Words** - Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function.

   b. **Exact Phrase** - Products containing the exact words (including spaces and punctuation) in the ordered entered are returned.

   c. **Any of the words** - Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one. NOTE: Do not use this option in combination with "All of the these Words"

6. After defining your criteria, click the **Search** button. The Search Results display at the bottom of the screen.

SEARCHING BY SUPPLIER

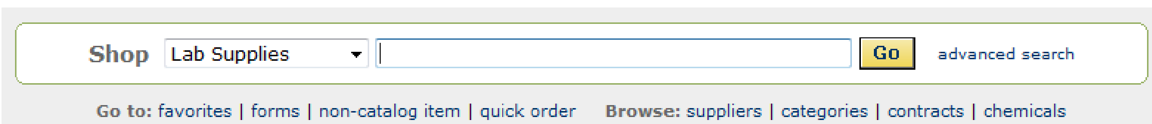
The Browse by Supplier functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by that supplier in that selected category.

Step by Step

The goal of this exercise is to find the desired products for a specific supplier using the Browse by Supplier search.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.

2. Below the simple/advanced search box, click on **Browse: suppliers**.



3. By default, all suppliers display. Suppliers are listed in alphabetical order with preference suppliers displaying first. **To search for a specific supplier:**

   a. Click the **+** to the left of **Click to expand Search for Supplier Filter**.

   b. To view all suppliers, click the **Search** button.

   c. To search by supplier name or supplier information, enter the appropriate information in the **Supplier Name** field. The supplier search allows for a "contains" name search. For example, if a supplier search is performed on "Grainger," "WW Grainger, Inc." will be returned in the results. The following fields are considered:

      - Supplier Name
      - Supplier defined Alias
      - Supplier Number
      - SciQuest ID
      - Third Party Reference Number
      - Commodity Code
      - **NOTE:** Supplier Name and Supplier defined Alias use the "contains" search functionality. Supplier Number, SciQuest ID, Third Party Reference Number, and the Commodity Code are all complete match searches

   d. From the **Show Types** drop down, select to view **Hosted Catalog Suppliers.**

   e. Click the **Search** button. The search results display.

4. Select the supplier from the Supplier Search results by selecting the **Supplier Name**. The supplier information and categories display.
5. From the supplier category page, select the desired product category by clicking on its name or the + next to its name. Continue drilling down into the categories (expanding/collapsing) until you locate the sub-category that you would like to view.
6. Final sub-categories (with items) are indicated with the word view next to it. Click the **view** button to view the items for the supplier in that particular category. You will be taken to the Search Results page.

Searching by Category

The Browse by Category functionality is similar to the Browse by Supplier functionality. The main difference is instead of viewing one supplier's table of contents; **all** supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section – beakers for example.

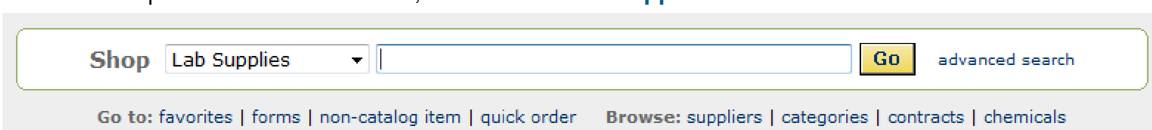
Browse by Category provides a quick way to locate all items – across all suppliers – in a certain category.

As with the Browse by Supplier functionality, once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by all suppliers in that selected category.

Step by Step

The goal of this exercise is to find the desired products using the Browse by Category search.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. Below the simple/advanced search box, click on **Browse: suppliers**.



3. A full list of available categories, across all hosted catalogs is presented. This is your full table of contents. Drill-down to the category of your choice using the + and – functions, which allow you to expand and collapse categories.
4. Final sub-categories (with items) are indicated with the word **view** next to it. Click the **view** button to view the items in that particular category. You will be taken to the Search Results page.
5. The Search Results page displays all of the items in the category selected for all suppliers. You may want to use the product comparison functionality for further product/supplier comparison. This feature is discussed on page 82.

> **SEARCH TIPS:**
>
> **Click Browse Categories after search results display to return to the prior list of categories and select a different product category for viewing.**

Searching with Punch-out Suppliers

In addition to searching supplier-hosted catalogs that are loaded in to the SelectSite database, searching for items via punch out suppliers can be performed. Punch-out vendor sites are very useful in finding products and services that require some configuration like computers, oligonucleotides, etc.

When accessing a punch-out supplier via SelectSite, the user is automatically authenticated to the supplier, so the supplier's website knows which organization the user is from to show the appropriate products and pricing.

For configurable items, e.g., computers and oligonucleotides (DNA/RNA), punch out catalogs is the preferred method for finding/configuring products. Product configuration sites like Dell, Gateway, and Invitrogen (DNA/RNA) are examples of when a punch out is preferred/required versus using a hosted catalogs.

Punch-out vendors are shown with icons (typically company logos) at the bottom of the search interface for each vertical. The **All** vertical shows all punch out vendors. Punch-out suppliers can also be accessed via the Purchasing Showcase.

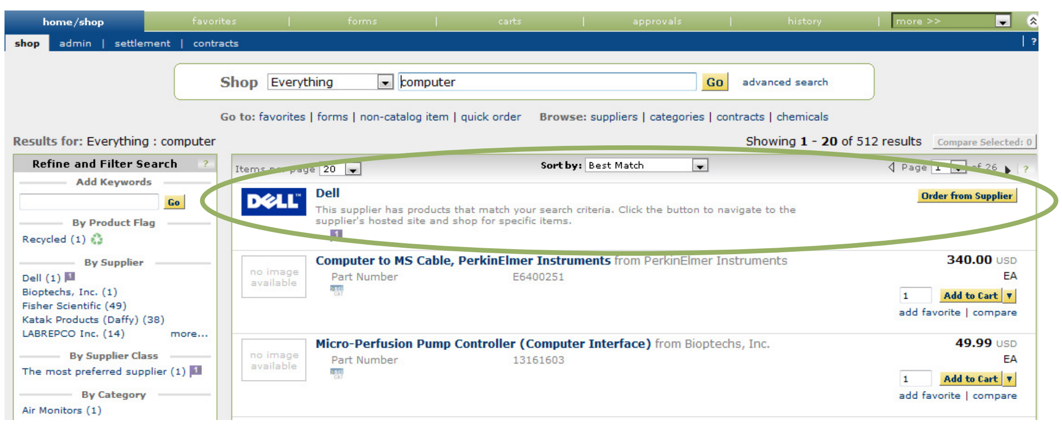
IMPORTANT: The interface and usability of punch-out shopping varies between suppliers. The step-by-step instructions of how to shop on each supplier's website is not provided in the exercise below.

Step by Step

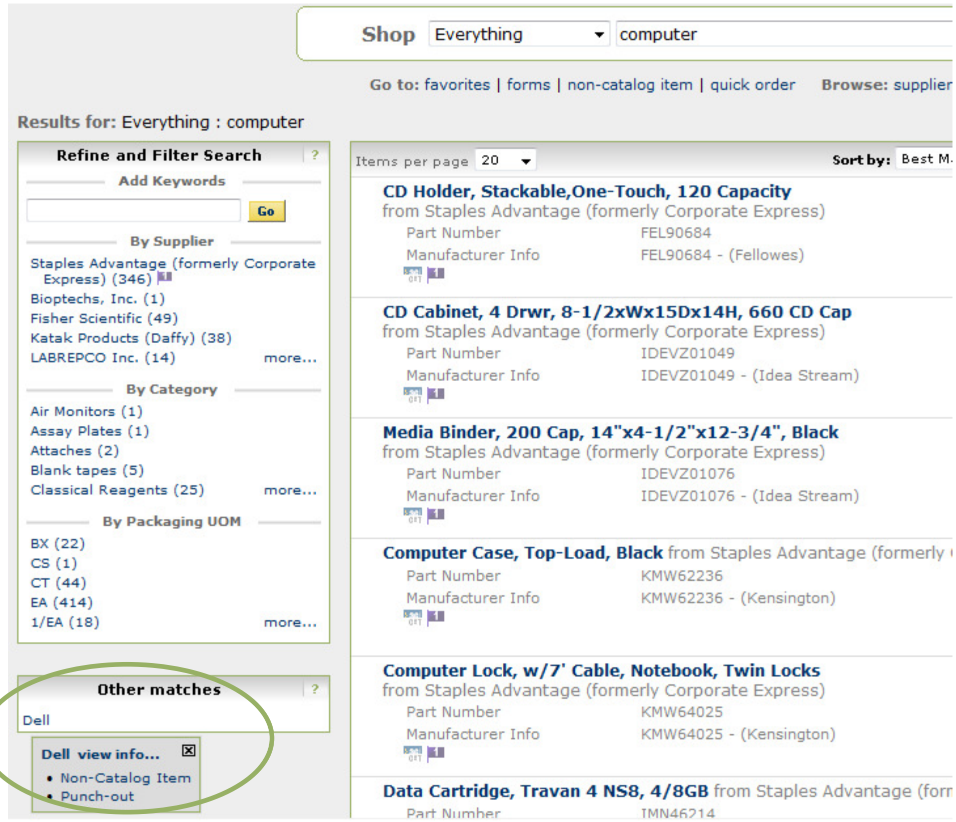
The goal of this exercise is to use a punch out site to find the desired product.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. If you know which supplier you would like to "visit" and want to go directly to the supplier's site, locate the supplier in the Purchasing Showcase or the Punch-out section of the home page. To perform a keyword search, follow steps 2a – 2c.
   a. From the simple or advanced search, enter keyword(s), then click **Search**. The search results will show up directly in the Product Search Result OR in the Other Matches section (shown in second screen shot).

Punch-out supplier displaying in Search Results: Click the Order from Supplier button to access the punch-out site.



Punch-out supplier displaying in Other Matches:

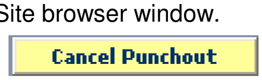


b. Below the Refine and Filter search box on the left, a list of **matching suppliers** displays. If the supplier has a punch-out site, it is indicated when the supplier name is selected, as shown in the example above (Dell).

c. Click the **Punch-out…** link to access the supplier punch-out site.

> **SEARCH TIP:**
>
> **In order for a punch-out supplier to be listed in the Other Matches box, your system administrator must enter and define keywords associated with the items sold by the supplier via the Supplier Profile. Refer to the Administrator Handbook for more information.**

3. Once the punch out is selected, the browser is redirected to the supplier's website. The supplier's website is framed within the SelectSite browser window.

4. To cancel the punch out, select the 

button at the top of the screen.

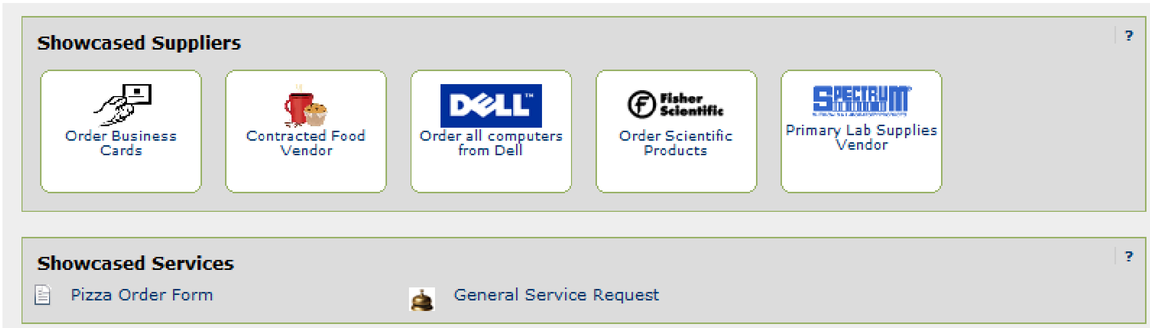
5. Once within the punch out site, use the appropriate search tools to find the desired products. Once all products are found, check out of the punch out site. The products in the punch out shopping cart are returned to the SelectSite shopping cart.

   TIP: An order is NOT being placed with the supplier when checking out of their punch-out site. The purchasing process continues once returned to SelectSite.

6. Additional products can be added to the SelectSite shopping cart from other punch out vendors as well as hosted catalog vendors

SHOPPING FROM THE PURCHASING SHOWCASE

The Purchasing Showcase is an area of the home page that organizations can choose to highlight specific suppliers, forms, and more. An example Purchasing Showcase is shown below. **NOTE**: Organizations are not required to use the Purchasing Showcase, in which case, this exercise would not be applicable.

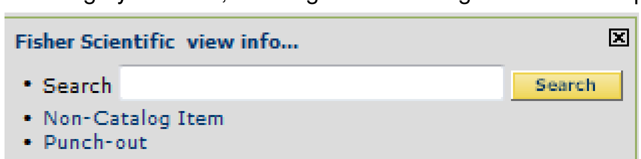


Suppliers listed in the Purchasing showcase may or may not have an icon attached to their name. Additionally, suppliers can have a caption, such as the ones shown above indicating what the supplier offers or special discounts.

Step by Step

The goal of this exercise is show users how to shop suppliers and/or featured services in the Purchasing Showcase.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. To shop from a **featured supplier**:
   a. Click on the **Supplier name** or **icon** in the Showcased Suppliers. A pop-up displays that indicates HOW you can shop from the supplier. The options can include hosted or punch-out shopping, browsing by contract, or using a non-catalog form. An example is shown below.

   b. The search results display just as they do with simple searches. Locate the item(s) to purchase and add them to your cart.
3. To shop from a **featured service** – meaning a form (which may or may not be associated with a contract):
   a. Click on the **form name** in the Featured Services area. The form displays.
   b. Populate the form as normal and add the line item(s) to your cart.

PERFORMING CHEMICAL STRUCTURE SEARCHES

The Chemicals search is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including molecular weight and molecular formula.

IMPORTANT:

SciQuest had upgraded the technology that powers current Chemicals search. The functionality and features are very similar between the two technologies, with the new technology providing higher quality searching capabilities and data.

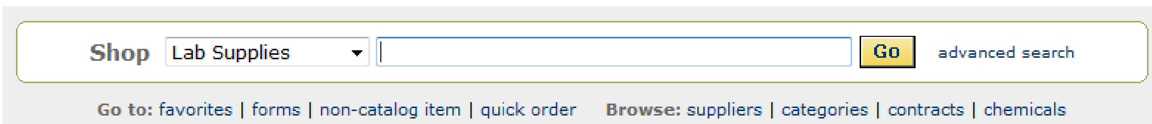
Other details of the solution:

- A security message pops up the first time you access the tool.
- The new technology requires Java 1.4.2 or later and is supported by the browsers found on the following webpage:
- http://www.chemaxon.com/marvin/help/developer/applets/browsers.html
- The new technology is fully integrated within the SelectSite application and does not require working in secondary or pop-up screens.
- SciQuest will have full capability to load the structure data provided by suppliers and will update data with every major release if needed.
- For more information about the Chemical Structure Search, refer to the New Feature Documentation found in the Support KnowledgeBase.

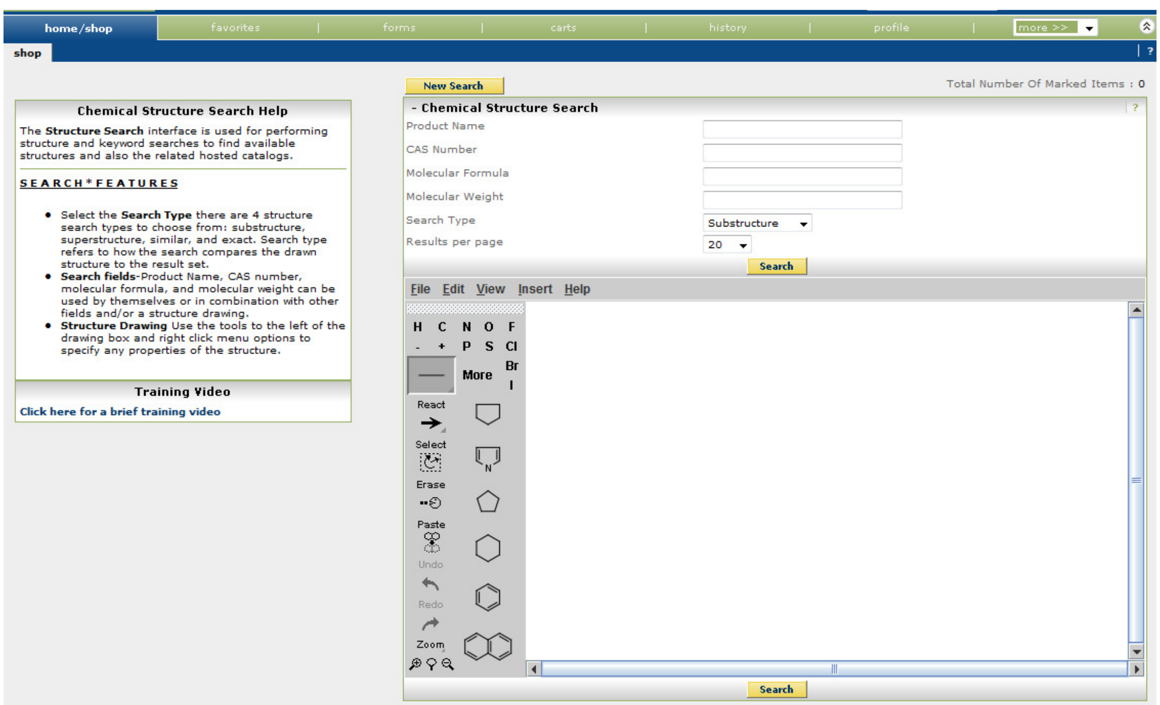
Step by Step

The goal of this exercise is to access the **Chemical Structure Search** tool and find commercially available products by drawing chemical structures and sub-structures.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. Below the simple/advanced search box, click on **Browse: chemicals**

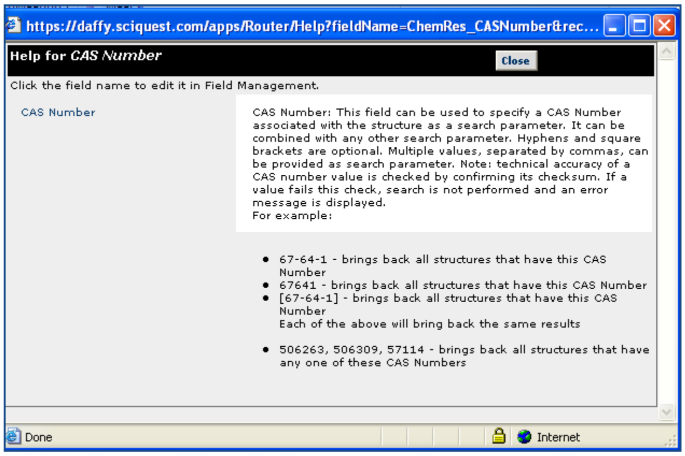


3. The first time this tool is used, a warning message displays. Click **Run** to continue. The Chemical Structure Search displays on the screen, as shown below:

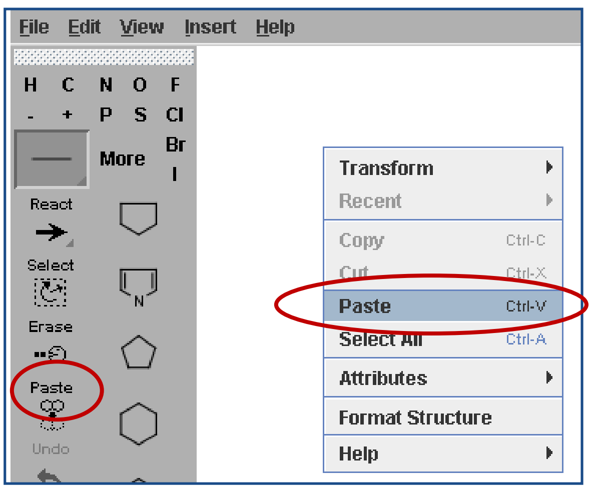


4. **Define the criteria.** The criteria entered/selected, determines the structure search results. <u>A user can perform any combination of the following</u>:

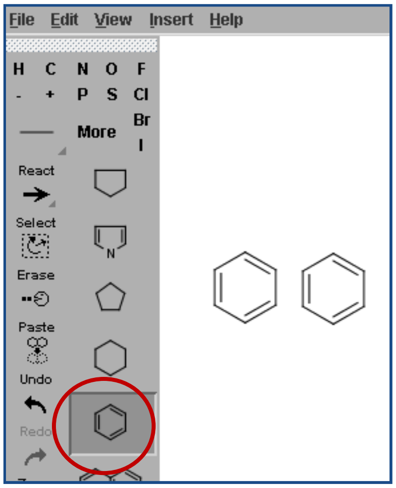
   a. <u>Enter criteria</u> in the fields at the top of the screen, including: Product Name, CAS Number, Molecular Formula, Molecular Weight, Search Type, and Results per page. Entering data in all of these fields is optional, but is a way to narrow down your search and can be used in combination with the drawings at the bottom of the screen. **HELPFUL TIP:** Click on the field label for any of these criteria options to access Help for the field. Detailed information about the option can be found, as shown in the example below.



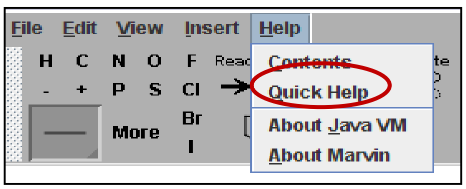
b. Paste an existing structure or sub-structure into the drawing block. This is a helpful tool for many scientists who have structures available in other tools such as *Isis Draw*. You can paste an existing structure either by selecting **Edit → Paste** from the toolbar, **right-clicking** and selecting **Paste** or by selecting the **Paste** icon on the left side of the drawing block.



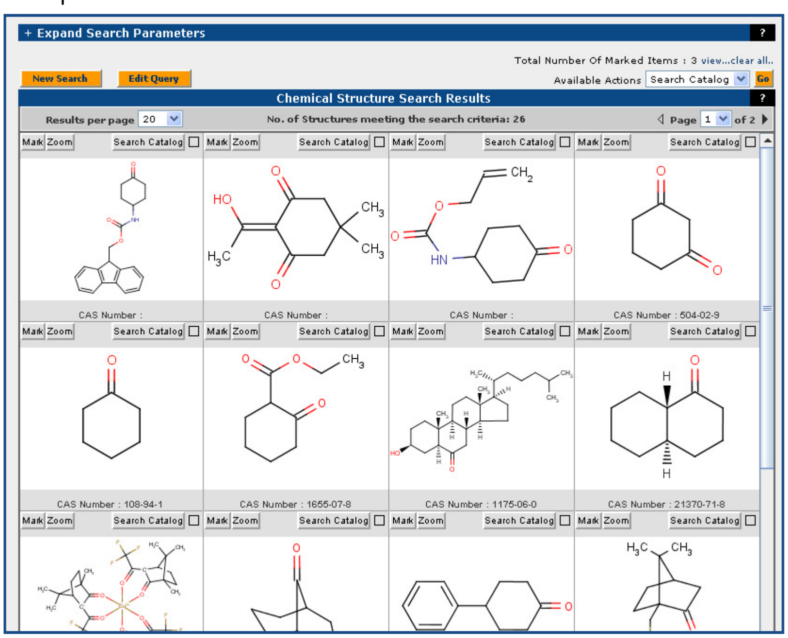
c. Draw a structure or sub-structure in the drawing box. With this option, simply select the entity that you would like to add to the drawing block and click the mouse within the drawing box. In the example below, the Benzene ring icon was selected, and two rings were added to the drawing block by clicking the mouse twice.



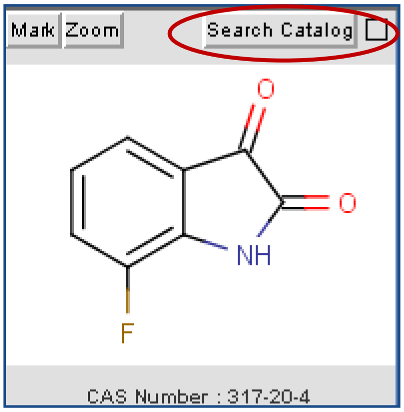
d. Make any changes to your drawing by using the Select, Erase, Undo, Redo, and other options available. To learn more about how to create drawings – and how each of the options work – refer to the **Help** guide provided by the manufacturer. This is located via **Help → About Marvin → Quick Help** as shown below.

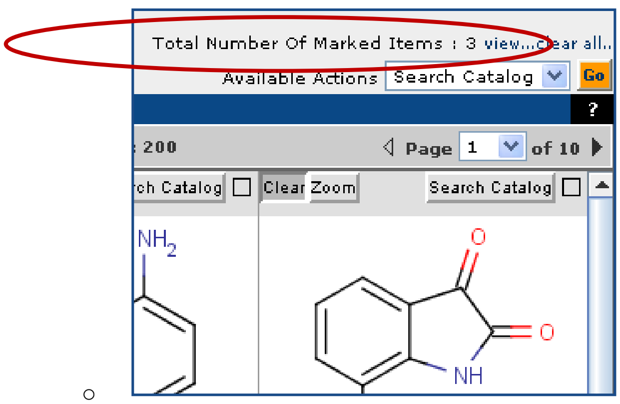


5. Click the **Search** button to search for matching structures. Structures display in order of relevance. An example of the Structure Results screen is shown below.

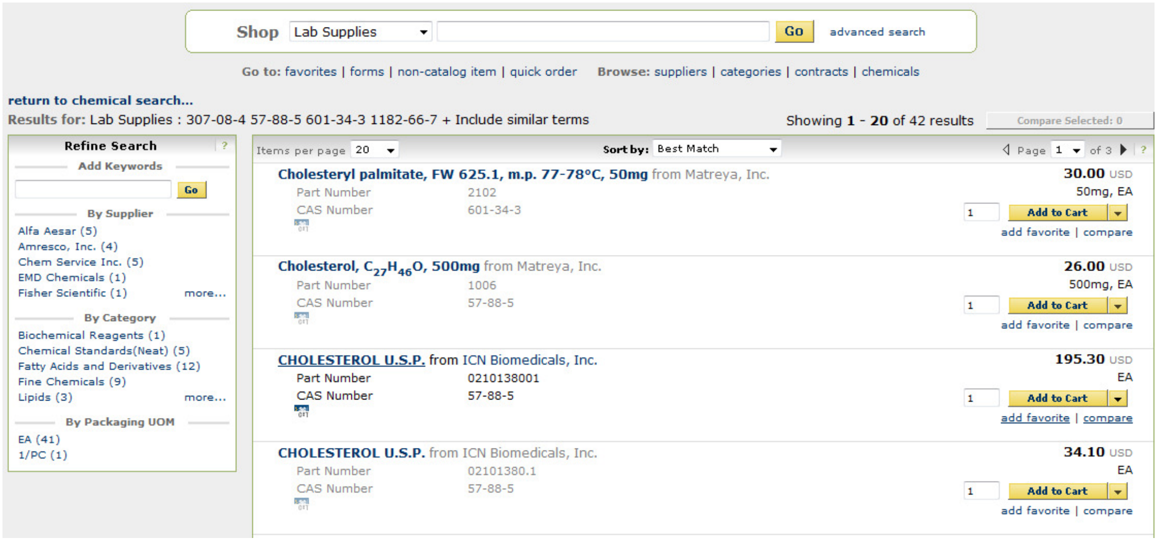


6. Review the list of structures.
   - To see the products that match a single structure, click the **Search Catalog** button above the structure.
   - To see products for multiple structures, click on the **X** in the right-hand corner of each structure, then select **Search Catalog → Go** from the Available Actions drop-down box.

- 

- If you cannot find the structure you are looking for, you can either edit your current criteria by selecting the **Edit Query** button above the search results OR select **New Search** to remove existing search criteria and start new.
- Marking results: You may want to mark certain structures for review later. SelectSite allows you to temporarily "hold" all of your marked structures, from one or more searches and across multiple logins. To mark a structure, click the **Mark** icon above the structure picture. A list of current marked items displays above the structure search results, as shown in the graphic below. Click the **view…** link to view the currently marked structures or click **clear all…** to remove the "marks" for each of the structures. **Note:** This does not remove the structures from the result list.
- 

7. The product results – if any – display. From this screen, you can add items as you normally would. If no items display, this is an indication that the "matching" hosted catalogs are not enabled at your organization or that the user does not appropriate permissions to view the item(s). **Note:** You have the option the go back to the structure results and select different structures to view potentially different results. Click the **return to chemical search** link above the product search results, as shown below.



Using Antibody Resource

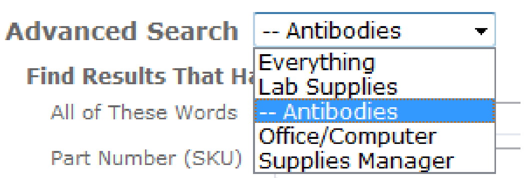
Antibody Resource is a tool geared specifically to biologists or researchers who use antibodies in their research. This search tool is a parametric search that allows users to filter products based on antibody specific attributes, e.g., Clone, Species Reactivity, Conjugate, etc.

Search Results are presented in a different format from the normal product search. Additional columns are included to help the researcher make informed decisions.

Step by Step

The goal of this exercise is to access the Antibody Resource parametric search to find commercially available antibody products.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. Although you can perform antibody searches using simple search, it is recommended to use advanced search. To do this, select advanced search.
3. Select **Antibodies** from drop-down box to right of Advanced Search.



4. Once Antibodies is selected, search criteria specific to antibody searches displays.
5. Select the appropriate category, conjugate, or host from the respective pull-downs if appropriate.
6. After defining your criteria, click the **Search** button. The Search Results display at the bottom of the screen. Antibody Search results contain additional columns relevant to Antibodies.

Lesson 5: Additional Search Functionality

Concepts

Non-Catalog Item Entry

SelectSite allows you to quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

The **non-catalog item entry screen** is an overlay "popup" that can be accessed from many different places in the application. The screen is easy-to-use and allows for quick entry of non-catalog items.

NOTE to customer prior to SelectSite version 7.2: Instead of using the non-catalog item entry screen, you may be using a form configured as a Non-Catalog form. This is an option.

Your organization may or may not allow non-catalog item ordering and is a setting that can by a System Administrator.

Forms

Forms are used in SelectSite to purchase items outside of hosted and punch-out catalogs. Forms are a fully customizable way to track requests for items, services, information, or actions by an organization. Forms can be viewed by all users or can be designed for a select group of users, for example, a department.

The use of forms is optional but provides flexible, customized way to track such things as Services Orders, Capital Expenses, and Internal Requests for a New Supplier. The fields and field labels are customizable on a form; therefore, users can track the necessary information without irrelevant fields on the screen.

In most cases, Spend Director-only customers do not use forms, but instead handle all one-off purchases in their primary financial system.

Forms can be accessed through the Forms navigation tab OR if associated with a contract, through search results.

Exercises

Using Quick Order

Quick Order is used when the exact product catalog number (SKU) is known. Both the supplier and manufacturer part numbers are searched when using **Quick Order**.

If the catalog number entered is an <u>exact</u> match to a product in the hosted catalogs, and there is only one match, the product is automatically added to the shopping cart. If an exact match is not found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product. Quick Order allows you to order one or more products simultaneously.

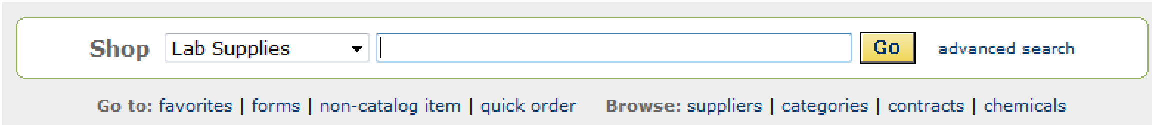
After selecting the product vertical (category) and entering a catalog number, the item will automatically be added to the cart if an exact match exists. Also, as before, multiple catalog numbers can be entered at once.

Step by Step

The goal of this exercise is to add one or more items directly into the cart when the complete catalog number is known.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.

2. Below the simple/advanced search box, click on **Go to: quick order**.



3. Optional: Select the appropriate vertical to search from the Category list.
4. Enter the catalog number(s) in one or more of the **Catalog # /SKU** fields and click the **Add to Active Cart** button. One of the following occurs:
5. If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, then the product is automatically added to the shopping cart. This information displays on the bottom of the screen.

   NOTE: If you would like to add the SKU automatically, it is important to enter the SKU exactly as the supplier has it listed. You should include periods, dashes, parenthesis, units of measure, etc… whenever this type of information is included in the supplier's identification.
6. If an exact match is **not** found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product.
7. If no search results are found, a link to the non-catalog form is presented, assuming you are allowed to place non-catalog orders with this supplier.

Review Additional Supplier/Product Information

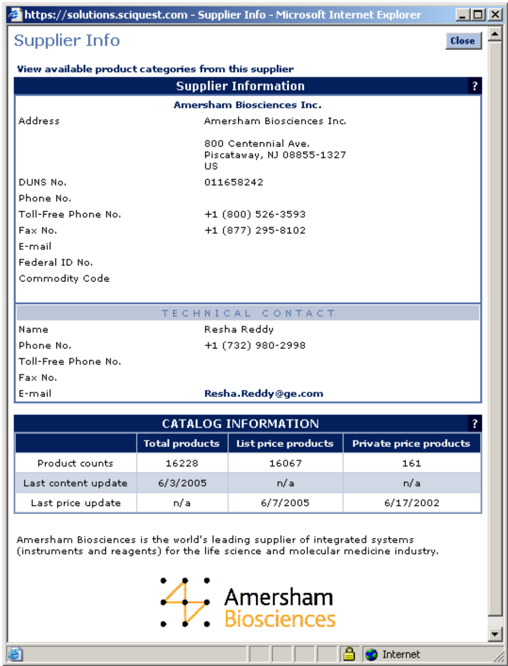
After searching for an item, the Search Results are displayed as discussed on page 51. If more information about the **item** or the **supplier** for the item is required, select either the product description or the supplier name in Search Results.

Supplier information contains contact information for the supplier, link to the supplier's website, and contract information (if applicable). Product information can contain additional product attributes, as well as links to product specific information like MSDS.

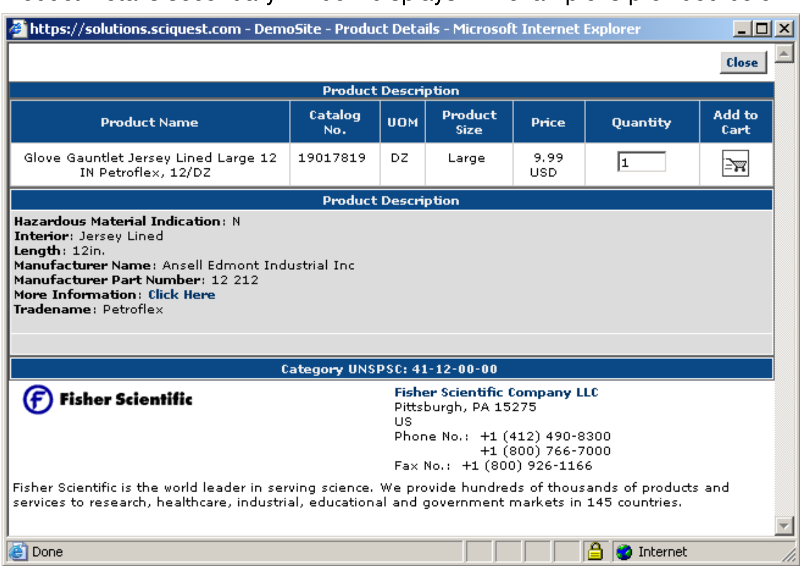
Step by Step

The goal of this exercise is to review supplier and product information not contained on the Search Results screen.

1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
2. To view detailed supplier information for an item, select the **supplier name** from the Search Results. A popup window displays with details about the supplier, including contact information and possibly item and catalog details. An example is shown below.



3. Click the **Close** button to exit the window.
4. To view additional product details, select the appropriate link from the Product Description column. The Product Details secondary window displays. An example is provided below:



5. Review the information. To see more information about the product, click the **Click Here** link beside of **More Information**. A new browser is opened directed to the supplier website-typically the specific product page on their site. Click the **Close** button to exit the window
   … OR…
   Enter the quantity to be purchase in the **Quantity** field, and then click the **Add to Cart** button.

REFINING SEARCH RESULTS

If the Search Results do not provide exactly what you need, you may want to refine your search. The left side of the product search results screen provides a number of ways to filter the search results, including adding additional keywords or by filtering by supplier, category, manufacturer, and more. Details:

- Additional Keywords can be added in the Add Keywords field to the left of search results or through Simple Search.
- The filter options that display to the left of search results is dependent on what options are relevant and what options your organization has chosen to enable. For example, if there are no product flags (green, energy star, etc), this filter option will not display.

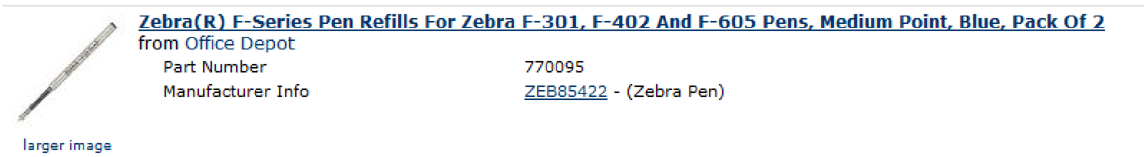
For information on performing initial searches, refer to the exercises in the previous lesson.

NOTE: This feature is off by default, and must be enabled by an administrator.

Step by Step

The goal of this exercise is to refine Search Results after the initial search is completed.

1. Search for products using any of the search tools mentioned in this handbook. Search results display below simple/advanced search.
2. Locate the item that you are interested in. For example, I found a pen I would like to order, but I would like to see if any other suppliers offer a better deal.



3. Click the Manufacturer Part Number, which is a link that displays to the right of the Manufacturer Info label.
4. The results screen updates to only display the item or items with the manufacturer part number requested. An example is shown below:

5. Click the **<<Back to Previous Results** button to return to your original search results.

REFINING SEARCH RESULTS BY MANUFACTURER PART NUMBER

In specific cases, a user may want to only see items for a specific manufacturer part number. For example, you might find the "right" item, but would then like to see all of the same items across all suppliers to compare pricing.

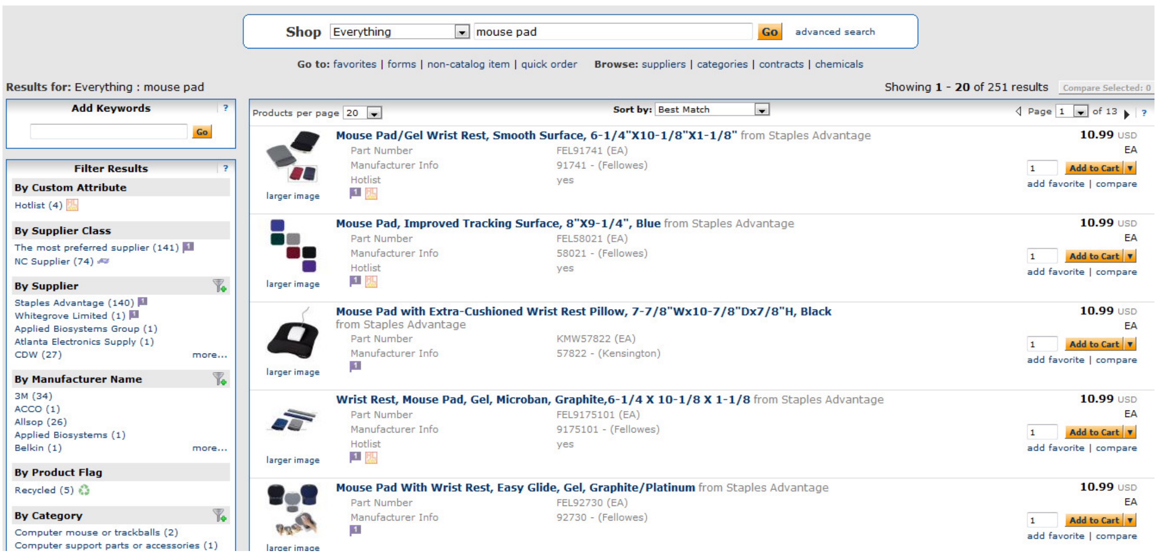
This task can only be performed after an initial search is performed and hosted data displays.

For information on performing initial searches, refer to the exercises in the previous lesson.

Step by Step

The goal of this exercise is to view additional items from other suppliers with the same manufacturer part number.

1. Search for products using any of the search tools mentioned in this handbook. Search results display below simple/advanced search. An example of the results screen is shown below:



2. To modify, add, or delete keywords, enter additional information in the simple or advanced search OR through the **Add Keywords** box on the left side of the screen. In the example below, the system will look for all mouse pads that are black (black is the additional criteria).

SORTING SEARCH RESULTS

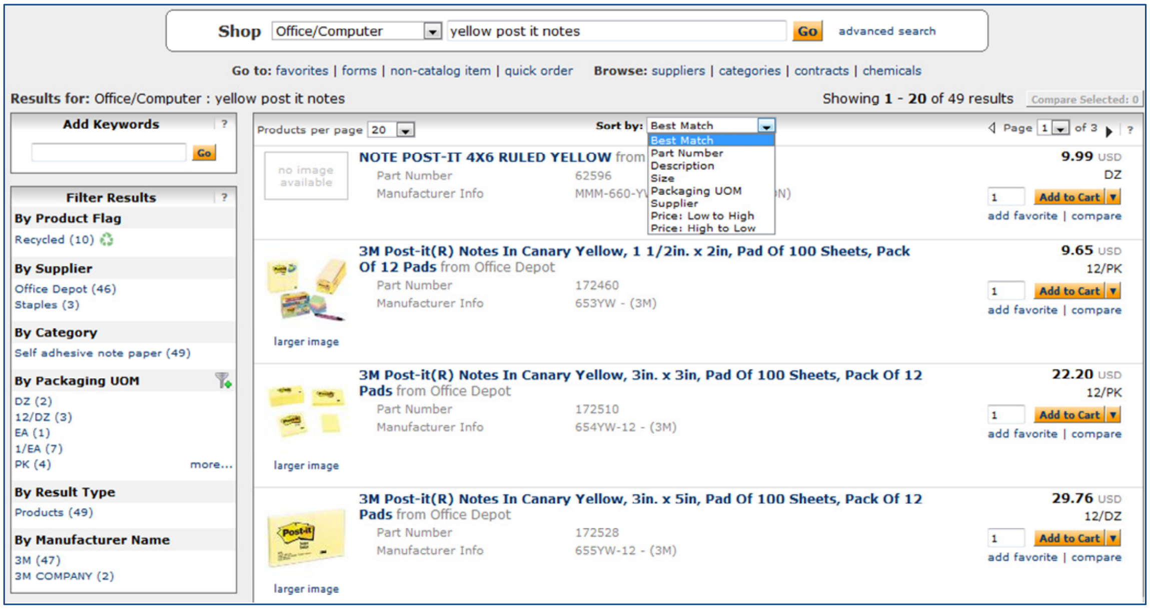
By default, search results are listed in the "best match" order which considers keyword relevance, along with preferences such as supplier classes and favorites. Users can choose to sort the result set a number of additional ways after the initial search is performed.

IMPORTANT: Sorting data should be the last step. Make sure to add any additional keywords and filter any data before sorting. Otherwise, the sort will be lost when the new search is performed.

Step by Step

The goal of this exercise is to refine sort search results.

1. Search for products using any of the search tools mentioned in this handbook. Search results display below simple/advanced search. An example of the results screen is shown below:



2. Above the search results, select the Sort by: drop-down box. Select from the following options to re-sort the data. NOTE: All data is re-sorted, not just the items listed on the active page.
   a. **Part Number** – Search Results are listed in alphanumerical order by Part Number as provided by the supplier.
   b. **Description** – Search Results are listed in alphanumerical order by Product Description, which is large and bold on the screen.
   c. **Size** - Search Results are listed by Product Size, as provided by the supplier.
   d. **Packaging UOM** - Search Results are listed by the unit of measure provided by the supplier. Additionally, you can refine by unit of measure by selecting the link on the left hand side.
   e. **Supplier** - Search Results are listed in alphanumerical order by supplier/vendor. Additionally, you can refine the results to a single supplier by selecting the supplier name on the left hand side of the results.
   f. **Price** – Search Results can be sorted by price (high to low or low to high). This feature is only available if there are 200 or fewer search results.
3. To return to **Best Match**, choose that option from the drop-down box.

USING THE COMPARISON FUNCTION

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. This function also allows you to determine the best pricing by auto-calculating prices based on Unit of Measure or Product Size.

Products found across multiple pages of search results can now be compared to one another.

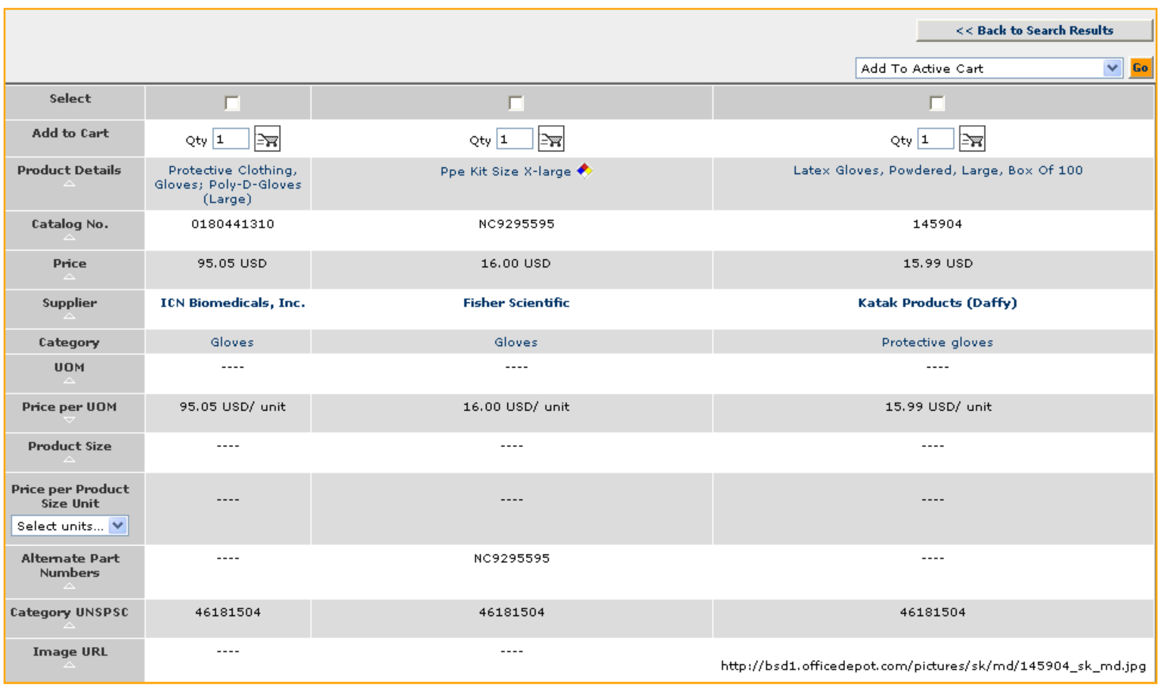
NOTE:

The product comparison feature can only be used to evaluate HOSTED catalog items. Items from punch-out suppliers do not display in the search results, therefore cannot be part of the side-by-side product comparison.

Step by Step

The goal of this exercise is to compare two or more products side-by-side.

1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
2. Click the **compare** button for each of the items to include in the comparison. Note: Items across multiple pages can be selected. The Compare Selected button will activate once one or more items are selected.
3. Once all items are selected, click the **Compare Selected** Button at the top of the search results.
4. The Product Comparison page lists, vertically, all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute. A sample product comparison screen, along with details on how to use this screen is



<< Back to Search Results

Add To Active Cart Go

Select			
Add to Cart	Qty 1	Qty 1	Qty 1
Product Details	Protective Clothing, Gloves; Poly-D-Gloves (Large)	Ppe Kit Size X-large	Latex Gloves, Powdered, Large, Box Of 100
Catalog No.	0180441310	NC9295595	145904
Price	95.05 USD	16.00 USD	15.99 USD
Supplier	ICN Biomedicals, Inc.	Fisher Scientific	Katak Products (Daffy)
Category	Gloves	Gloves	Protective gloves
UOM	----	----	----
Price per UOM	95.05 USD/ unit	16.00 USD/ unit	15.99 USD/ unit
Product Size	----	----	----
Price per Product Size Unit Select units...	----	----	----
Alternate Part Numbers	----	NC9295595	----
Category UNSPSC	46181504	46181504	46181504
Image URL	----	----	http://bsd1.officedepot.com/pictures/sk/md/145904_sk_md.jpg

provided below.

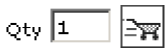
a. To remove a product from the compare page, click the check box at the top of the product and select the **Remove** action from the action menu, then click **Go**. The product is removed from the list of items.

b. Click on any of the links, indicated in bold text, for more information. These links typically open a new browser directed to the specific products webpage on the supplier's website.

c. To determine pricing breakdown, use the **Price per Product Size Unit** field, then select the unit for evaluation. This selection will auto-calculate the price per UOM and Product Size. This feature allows the user to easily change the UOM for evaluation. For example, you can evaluate the products in L vs ML.

d. Click the **more info** link to view a detailed product description, and if available, a graphic of the item (indicated by the camera.

e. To add an item to the cart, enter the quantity in the Quantity field, then click the Add to Cart icon.



f. Click the **Back to Search Results** button to go back to the original search results and cancel the product comparison. From here, additional products can be selected for comparison.

USING FORMS

Forms are typically used to order goods and services that do not fit in to the hosted catalog model, e.g., catering services, business cards, or temporary labor. Additionally, forms allow for the input of additional information by the requisitioner that is delivered to the supplier of the good or service.

Forms are created/configured by each organization and are **not** required but are frequently used in SelectSite. The actual name(s) and field setup of the forms vary by organization, but the exercise below is applicable to all configured forms. Some examples of forms that your organization may use:

- Services Form
- Change Order Form
- Lease Request Form
- Contract Payment Request Form
- Food Services Request

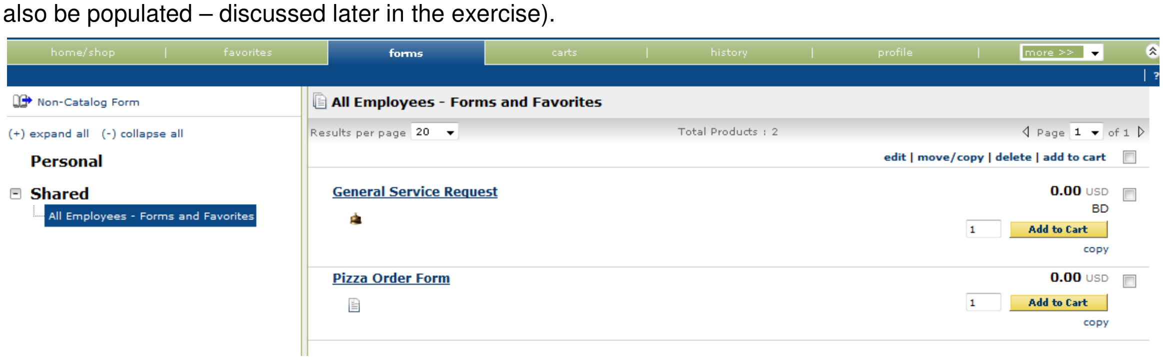
Forms are used to order goods and services where additional inputs are needed from the requisitioner. Forms can be set up for use for all users or for a specific group of users – such as a department.

NOTE: This exercise discussed accessing forms from the Forms navigation tab. Forms can also be accessed through Product Search if associated with a contract.

Step by Step

The goal of this exercise is to use a form to order goods or services.

1. Go to the **Forms** navigation ab.
2. Organization and Departmental forms can be accessed by clicking the Shared link. (Personal forms can also be populated – discussed later in the exercise).



3. Click the Form name from the right pane and the form will open.
4. Enter the optional and required information on the form. Required fields are in **bold**. In some cases suppliers are pre-populated. If not:

a. Enter the supplier name or information in the **Enter Supplier** box. As you begin typing the AutoComplete/Type-Ahead functionality will display. Suppliers are ordered by best match and display with associated preference icons. The first eight matches are listed with a link to display all matches based on the entered criteria.

b. When the supplier is selected, the preferred fulfillment center is defaulted, but it can be changed by clicking the **select different fulfillment center** link. From the popup window, click **Select** for the appropriate address.

5. Once the form is filled out, select one of the following actions:

   a. To add the populated form to your current cart, select **Add to Current Cart** from the available actions drop-down box and click the **Go** button.

   b. To add the populated form to a draft cart or to a cart that you previously submitted but has not been approved, select **Add to Draft Cart or Pending PR/PO** from the available actions drop-down box and click the **Go** button.

   c. To add the item to your favorites, select **Add to Favorites** and click **Go**. A pop-up window displays where you can select the personal folder and name of the form.

6. The item, goods, or service is added to the shopping cart. To edit the form once added to the cart, click on the form name in the cart.

NOTE: Refer to Online Help (?) for additional information about forms.

ENTERING NON-CATALOG ITEMS

SelectSite allows you to quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

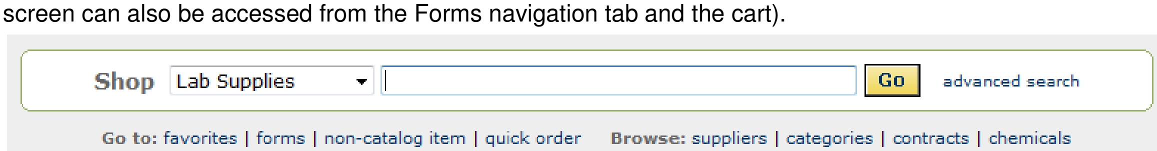
Your organization may or may not allow non-catalog item ordering. This exercise is not applicable if this feature is not available to requisitioners.

Suggestion: It is recommended to order items via hosted or punch-out catalogs whenever possible. Non-catalog ordering may require additional approval steps.

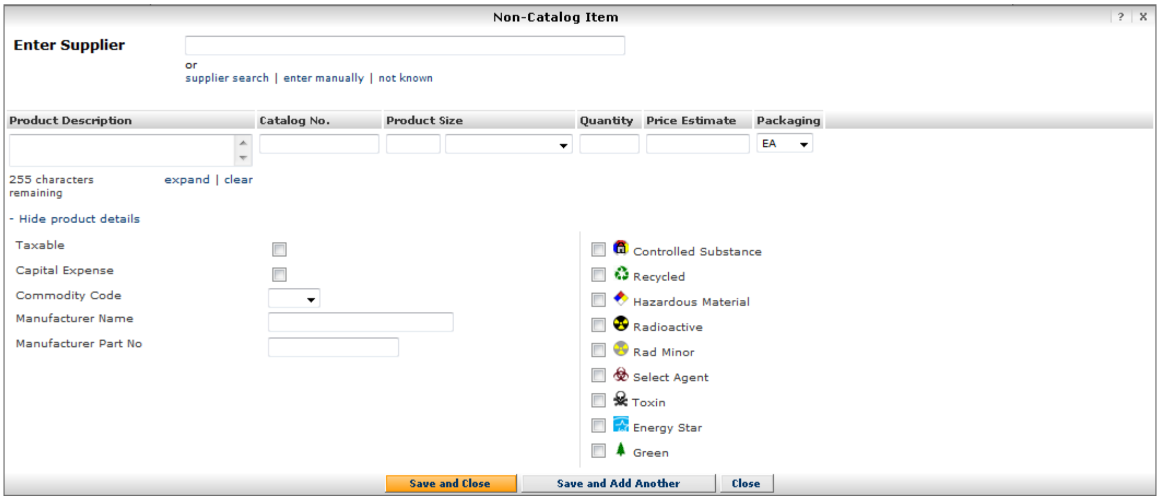
Step by Step

The goal of this exercise is to order an item that is not available in either a hosted catalog or punch out catalog.

1. Go to the **home/shop** tab → **shop** sub-tab (this may be defaulted). Note: You can also select the logo in the upper left-hand corner to access this screen.
2. Below the simple/advanced search box, click on **Go to: non-catalog item**. (Note: The non-catalog item screen can also be accessed from the Forms navigation tab and the cart).

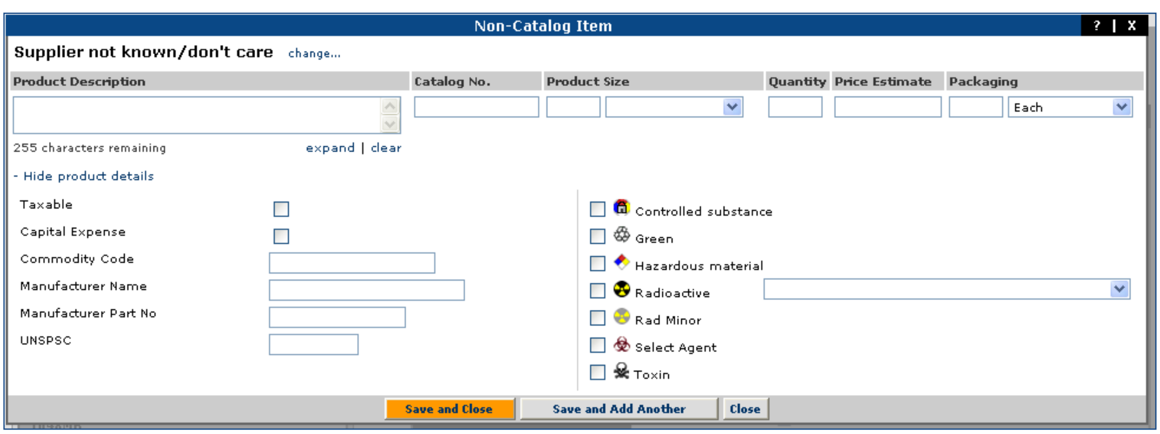
   

3. The Non-Catalog Item overlay window looks similar to the one shown below. Follow the steps below to enter one or more items to your cart.



NOTE: The steps below may vary by organization. Some sites and users are set up to bypass the SKU search, while it is required for others. The steps below assume the **Bypass the SKU search** permission is enabled. Additionally, it is assumed that the permissions to add a new supplier is off, so only the selection from existing suppliers is permitted.

4. Select the Supplier for the non-catalog item:
   a. Enter the supplier name or information in the **Enter Supplier** box. As you begin typing the AutoComplete/Type-Ahead functionality will display. Suppliers are ordered by best match and display with associated preference icons. The first eight matches are listed with a link to display all matches based on the entered criteria.
   b. When the supplier is selected, the preferred fulfillment center is defaulted, but it can be changed by clicking the **select different fulfillment center** link. From the popup window, click **Select** for the appropriate address.
   c. If you do not know the supplier for the item you need, select **not known** from the Enter Supplier area of the screen.
5. Fill in all required fields: Product Description, Catalog #, Product Size, Quantity, Price Estimate, and Packaging info.
6. **Optional:** Click the **show product details** link to enter additional information for the item. The popup will expand and you can make your selections. Click **Hide product details** if you do not want to view the bottom half of the screen.



7. After entering the item information:
   a. If you only want to order one item from the supplier, click **Save and Close**.

b. If you want to order multiple items from the supplier or another supplier, click **Save and Add Another**. The screen will empty except for the supplier, which can be modified if needed.

c. Click **Close** if you want to exit the Non-Catalog popup.

8. The item(s) that were added can be viewed from the shopping cart. To edit the non-catalog item once added to the cart, simply click on its name in the cart and the popup will display.

YOUR FAVORITES

Lesson 6: Managing Favorites

Favorites can be used by a requisitioner to identify items that are frequently ordered. By setting up favorites, less time is spent searching for items that will be ordered again in the future.

Key Concepts

FAVORITES

Within SelectSite, there are two types of favorites items: Personal Favorites and Shared Favorites. Personal favorites are those that an individual identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders. Shared favorites and folders are set up by administrators, and can be set up for viewing/use for the entire organization or a subset – such as a department, specific users, or a specific role. Shared favorites typically represent frequently ordered products or suggested products for purchase.

The following types of items or requests can be saved as favorites:

- Hosted items
- Punch-out Items
- Non-Catalog items
- Populated Forms – any type – service requests, food requests, etc…

Searching for Favorites

Organizational AND Personal favorites are searchable and display in the search results. For example, you may order continental breakfast for a monthly meeting. The first month you fill out the *Food Services Form* on your site and choose to save it as a favorite. The next month you can simply enter "continental breakfast" in the product search and the populated form will display in the search results. Simply enter the number of people attending in the quantity field and click **Add to Cart**.

Managing Favorites

The Favorites navigation menu is used to create and define company and personal favorites folders and items. Items can be moved and copied between folders. Current folders may also be edited and deleted. Note: Favorite items can be also be added through search results and the checkout screens.

VIEWING FAVORITES IN SEARCH RESULTS

Favorites are identified in search results by the star icon as shown below.

Exercises

Adding Favorite Items to your Cart

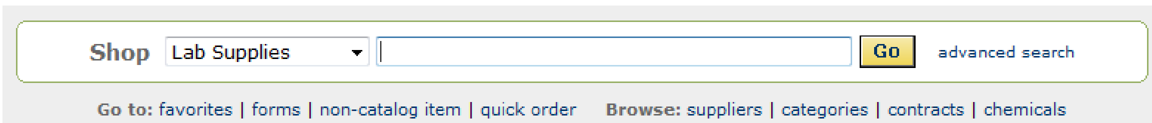
The **Favorites** functionality allows requisitioners to store items that are referenced or ordered on a regular basis. Depending on your permissions, you may be able to add items to shared folders in addition to personal favorites.

Once items are added to **Favorites** they can be added to a shopping cart from either of two places: from the **Favorites** tab accessed via the home page or Search Tools navigation tab OR from the My Favorites navigation tab.

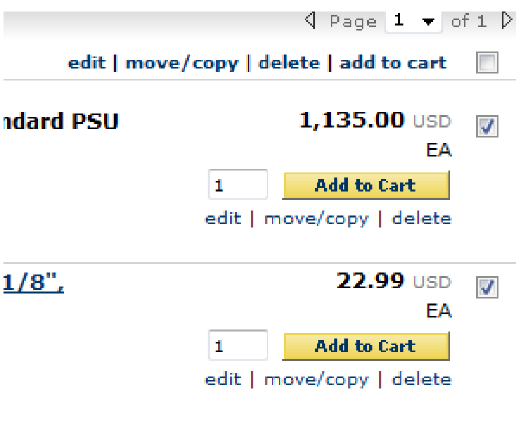
Step by Step

The goal of the exercise is to add a favorites item to the cart. (Note: In addition to the steps below, if a favorites item displays in the Product Search Results, it can added to the cart as any other item).

1. Click the **Forms** navigation tab... OR... Go to the **home/shop** tab → **shop** sub-tab, and select **Go to: forms**.



1. From the Forms page, select the appropriate **folder** from the Personal or Shared sections on the left-side of the screen.
2. The items for the folder selected display on the right hand of the screen. From here, click the **Add to Cart** button to add the item to your cart.
3. To add multiple items to your cart, enable the checkbox for each item, then click add to cart at the top of the list.



Adding Items to My Favorites

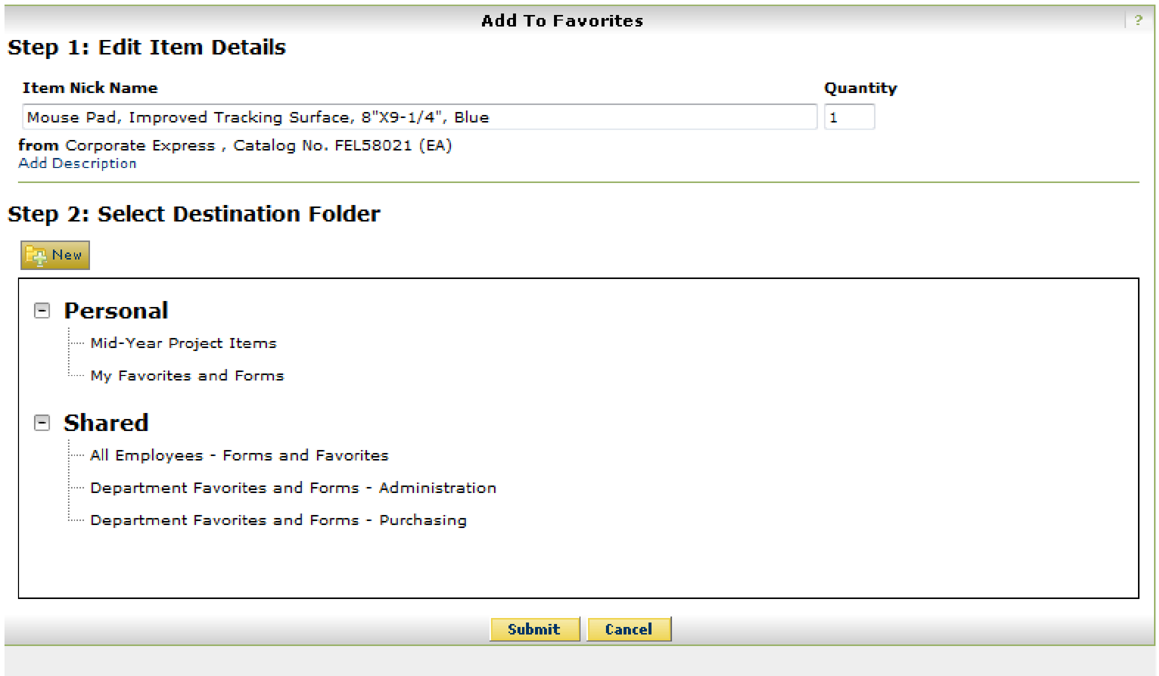
Using the **Favorites** functionality, items that are referenced or ordered on a regular basis can be stored for easy access. Both **My Favorites** and **Shared Favorites** options are controlled by permissions. Some users may also have the ability to add items to shared folders, for example, for departmental favorites

Favorites can be added from the product search results, from the cart, and when working in forms and the non-catalog item entry screen. Although the “starting point” may be different, the way in which favorites are added is the same.

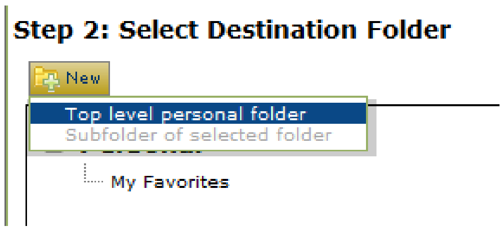
Step by Step

There are multiple ways in which to add items to your favorites. In this example, we will add an item to favorites from the product search results.

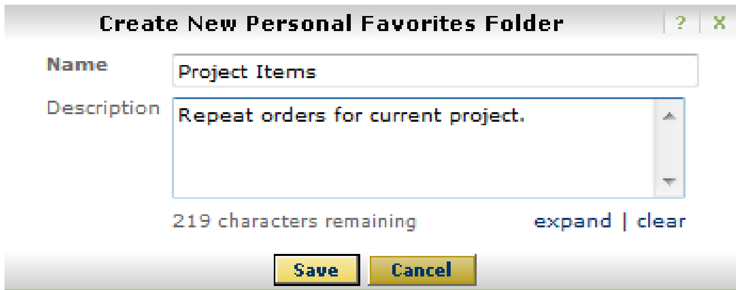
1. Search for products using any of the search tools mentioned in this handbook. Search Results display below the simple/advanced search.
2. From the **search results**, locate the item to add as a favorite.
3. From the right side of the line item, directly below the **Add to Cart** button, click the **add favorite** link. The **Add to Favorites popup** displays.



4. In the Item **Nickname** box, enter the name to reference the item. Oftentimes, instead of the supplier provided product description, you may want to name the item something that you – or other users – can recognize, such as “Standard Printing Paper”
5. Enter the standard **quantity** that will be ordered for the item. For example, if you are setting up an org-wide favorite and you would like everyone to order 3 cases of paper, enter 3 in the quantity. The quantity can always be updated when adding to cart.
6. **Select the destination folder**. For this, you have the option to assign the item to an existing personal or shared folder (if you are allowed), as described in 6a below... OR... you can create a new folder for the item, as described in 6b.**New users will need to create at least one personal folder in order to save items (refer to step 6b).**
   a. Under the **Personal** and **Shared** headings, only those folder that the user has access to “add to” are displayed. In the example above, the user can add items to his personal favorites or three different shared favorites folders. In most cases, users will only be able to access their personal folders. Select the folder name, and it will be highlighted. Click **Submit** to add the item.
   b. To create a new folder for the favorite item, click the **New** button, then select the type of folder you will be adding. New users will select **Top level personal folder**, as shown below. After one folder is created, you can continue to add top level folders or add sub-folders by selecting the top level folder from the list, then selecting **New → subfolder of selected folder.** This option is only available when the top folder is selected first. *NOTE for administrators: Adding shared folders and items works the same way except you will select Top-level shared folder.*



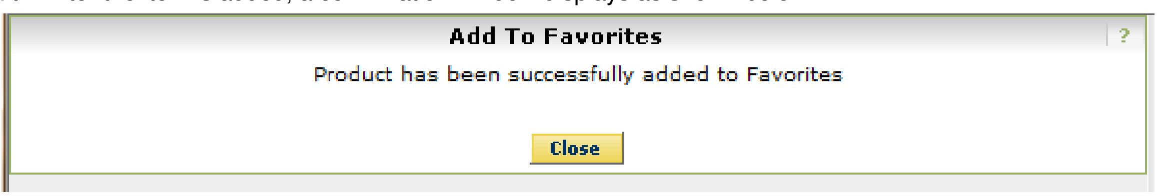
c. After selecting the folder type and location, a window displays similar to the one below:



d. Enter the **folder name** and **description**, then click **Save**.

e. The new folder displays in the list, and is automatically selected for the favorites item. Click **Submit** to save the item.

7. After the item is added, a confirmation window displays as shown below.



8. After the item is added, it can be accessed via the Favorites navigation tab.

Creating Favorites and Forms Folders

Folders and sub-folders are used to house both favorites items and forms access. There are two types of folders – personal and shared. Personal favorites are only viewable by the user and are most commonly used. Shared folders are use to house favorites items and forms to be used organization-wide or for a specified group of people such as a group of users, a department, a role, etc.

Any folder structure can be created, in terms of adding new folders (if any) and nesting subfolders within them as appropriate. Most users will only be able to create personal folders and sub-folders, but working with shared folders works very similarly.

Ideas for Favorites folder structure

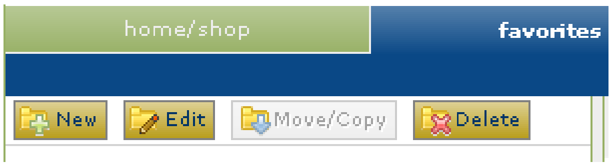
- Products from a single supplier
- Products in a single commodity
- Products for a single department
- Top (n) products ordered
- Products for a particular experiment
- Products needed for new hires
- Products ordered every week
- Internal inventory specials

Step by Step

The goal of this exercise is to create a new folder or subfolder in Favorites. The exercise is broken down by task – first creating a personal favorites folder, then creating a shared favorites folder.

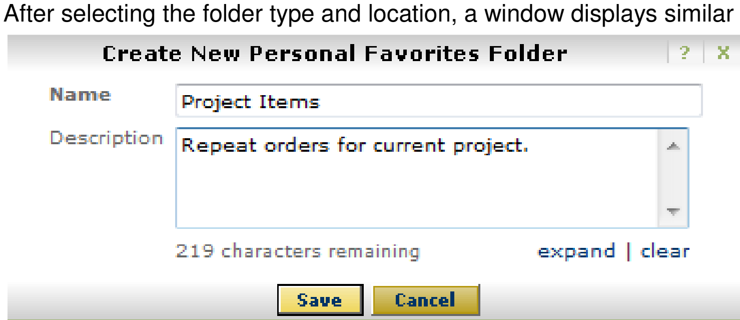
Task 1: Create a Personal Folder or Sub-Folder for Favorites and Forms

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. For new users, you should start by creating at least one Personal folder. To add a top-level folder, Click the **New** button to create a new folder. To add a sub-folder, select the existing, top-level folder from the Personal list, then click the New button.



3. When the new button is selected, one or more of the following options display:

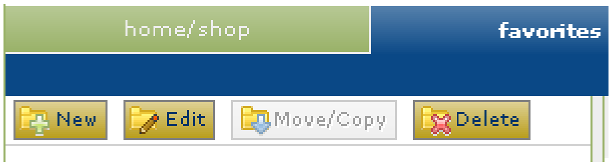
   a. **Top level personal folder** – This option is always available, and should be selected by new users or to create a top-level folder to hold personal favorites and forms.
   b. **Top level shared folder** – This option is only available to users who are allowed to administer shared favorites and forms. Refer to the next task for more information on how to add shared folders.
   c. **Subfolder of selected folder** – If a personal or shared favorite is selected, this option is available and allows you to create a nested sub-folder.
4. After selecting the folder type and location, a window displays similar to the one below,



5. Enter the **folder name** and **description**, then click **Save**.
6. The new folder displays on the left pane.

Task 2: Create a Shared Folder or Sub-Folder for Favorites and Forms

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. When creating shared folders, it is important to determine a naming strategy prior to adding folders. Although the names can be changed, this can be helpful to administrators and users. For example, make an indication by name as to whether the folder is an organization-wide folder or for a specific group (department, etc).
3. To add a top-level shared folder, Click the **New** button to create a new folder. To add a sub-folder, select the existing, top-level folder from the Shared list, then click the New button.

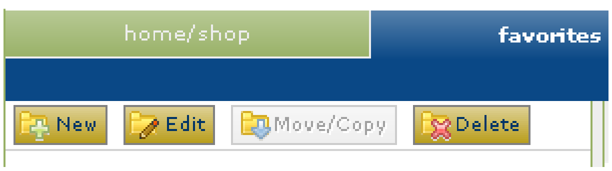


4. When the new button is selected, one or more of the following options display:

   a. **Top level personal folder** – This option is always available, and is used to create personal favorites.
   b. **Top level shared folder** – This option is only available to users who are allowed to administer shared favorites and forms. Select this option to create the first shared folder. After that, you can select this option for top level folders or the next option
   c. **Subfolder of selected folder** – If a personal or shared favorite is selected, this option is available and allows you to create a nested sub-folder.
5. After selecting to add a top level shared folder or shared folder, a window displays similar to the one below,

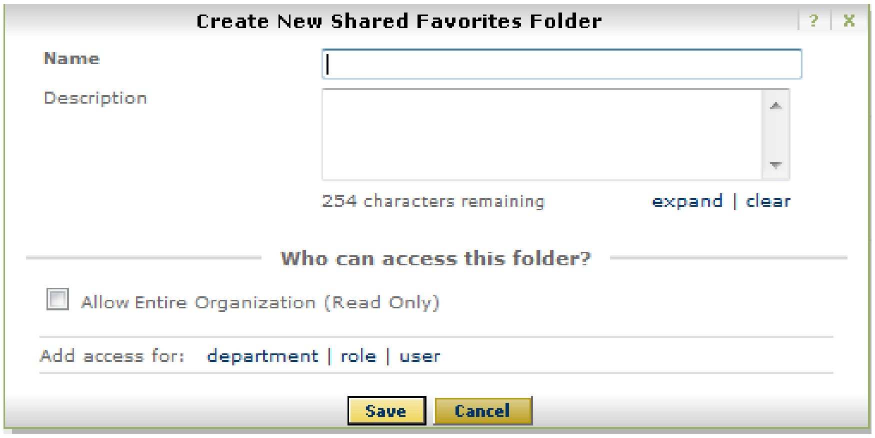
Task 1: Create a Personal Folder or Sub-Folder for Favorites and Forms

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. For new users, you should start by creating at least one Personal folder. To add a top-level folder, Click the **New** button to create a new folder. To add a sub-folder, select the existing, top-level folder from the Personal list, then click the New button.

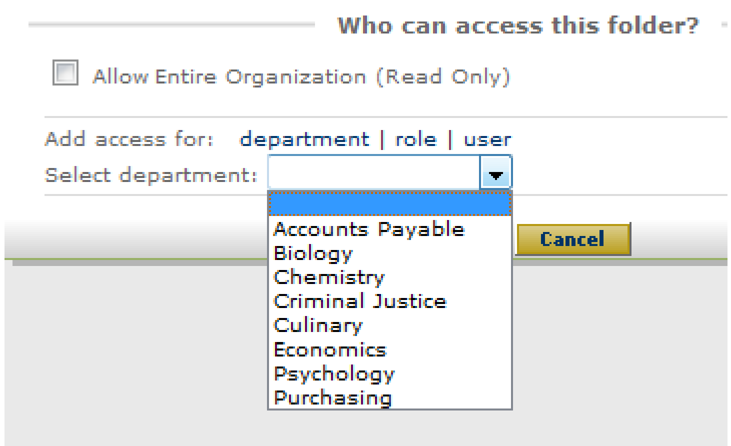


3. When the new button is selected, one or more of the following options display:

   a. **Top level personal folder** – This option is always available, and should be selected by new users or to create a top-level folder to hold personal favorites and forms.
   b. **To level shared folder** – This option is only available to users who are allowed to administer shared favorites and forms. Refer to the next task for more information on how to add shared folders.
   c. **Subfolder of selected folder** – If a personal or shared favorite is selected, this option is available and allows you to create a nested sub-folder.
4. After selecting the folder type and location, a window displays similar to the one below,



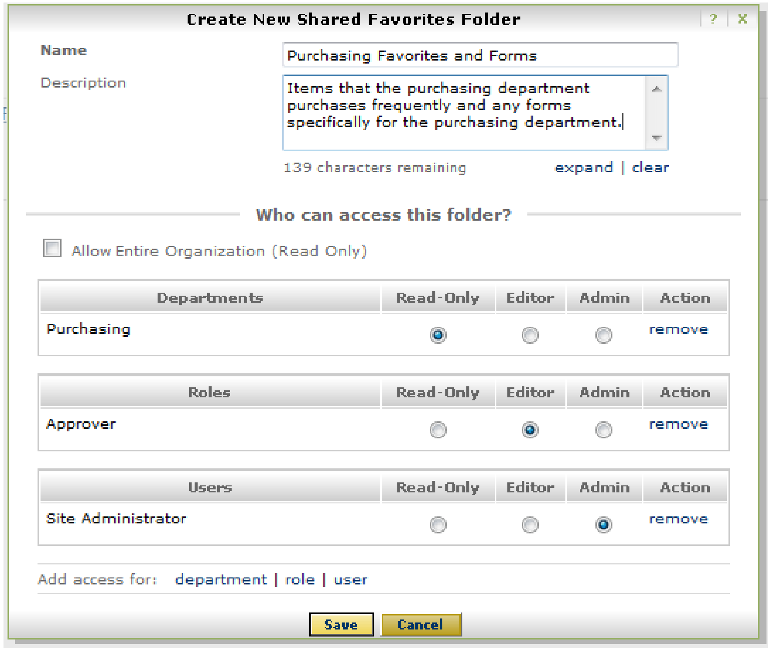
5. Enter the **folder name** and **description**
6. In the Who can access this folder? section you can determine if the folder will hold items/forms for the entire organization or a group of users.
   a. Enable the **Allow Entire Organization** checkbox to allow all users to see the folder and items or forms held in the folder. Users will only be able to select the favorites and forms and cannot edit them. Skip to Step 7.
   b. To enable access for a group of users – one or more departments, one or more roles, one or more users, or a combination of those things, start by clicking the department, role, or user link.
   c. If **department** or **role** is clicked, the screen will look similar to the one below. If user is selected, a secondary window displays and the user can be selected from there.



   d. After the department, role, or user is added, you can determine whether that group or user is allowed read-only, editor, or admin privileges, as shown below.

      - **Read-only:** allows the department, role, or user to shop in the folder only.
      - **Editor:** allows the department, role, or user to shop in the folder, add/remove sub-folders, and add/remove item.
      - **Admin:** allows the department, role, or user to shop in the folder, add/remove sub-folders, and add/remove items, as well as manage which departments/roles/users can access the folder.

   e. You can add more users, as shown below. In this example, users in a specific department, users with a specific role, and one specific user all have privileges (at different levels) for the shared folder.



7. Click **Save**. The new folder displays on the left pane.
8. The new folder displays on the left pane. Favorites items or forms can be added immediately.

Moving and Copying Items between Folders

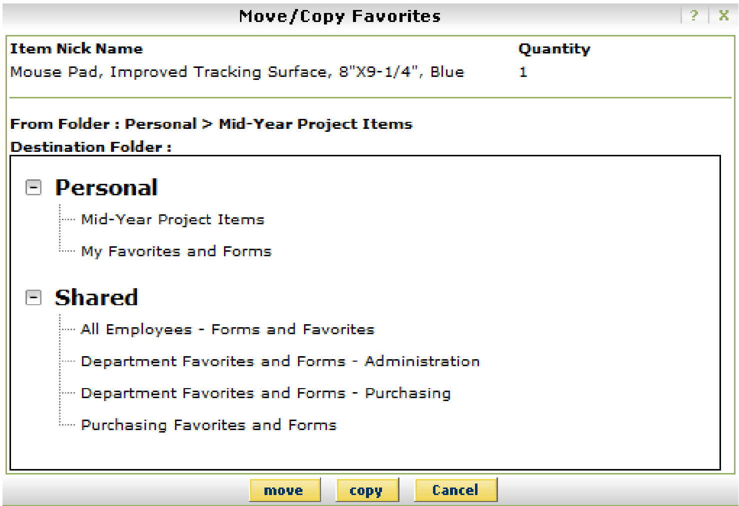
SelectSite allows you to move items and forms from one folder to another and copy items from one folder to another. These features may be useful if you create a sub-folder for a specific type of items and need to move favorites added earlier or when creating “repeat” items for multiple shared folders.

Items can be moved and copied from personal to shared folder and vice versa, as long at the user has appropriate permissions.

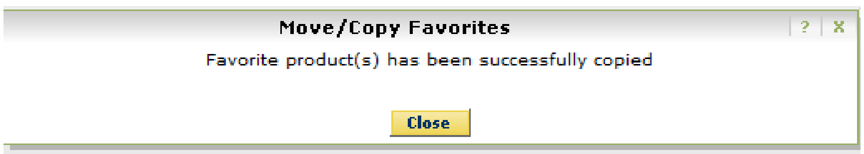
Step by Step

The goal of this exercise is to copy and move items from a favorites folder to a new folder or sub-folder.

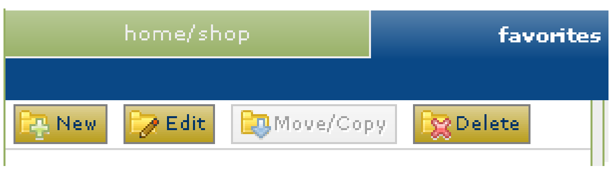
1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. Select the appropriate folder from the left pane, and locate the item(s) on the right pane.
3. To move or copy one item to a different folder, click the move/copy link directly under Add to Cart.



4. Select the folder to move or copy the item to, then click the appropriate button: **move** or **copy**. Move will take the item from the current folder and move it to the new one. Copy will make a copy and leave the existing item in the original folder.
5. After selecting to move or copy the item, a confirmation window displays.



6. Click **Close**. The item is now moved or copied.
7. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. For new users, you should start by creating at least one Personal folder. To add a top-level folder, Click the **New** button to create a new folder. To add a sub-folder, select the existing, top-level folder from the Personal list, then click the New button.



8. When the new button is selected, one or more of the following options display:

Editing Favorite and Forms Folders

After adding a favorites item or form to a folder, you may need update the item, including the name and quantity.

Step by Step

The goal of this exercise is to edit a favorites item.

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. Select the appropriate folder from the left pane, and locate the item(s) on the right pane.
1. Click the **edit** link directly under Add to Cart.
2. Make any necessary changes to the item, and click **Save**.

Deleting Favorite Items and Folders

In Favorites, items or folders can be deleted as necessary. Sometimes items are no longer available, regularly ordered items change, or an incorrect item may have been added to Favorites.

Step by Step

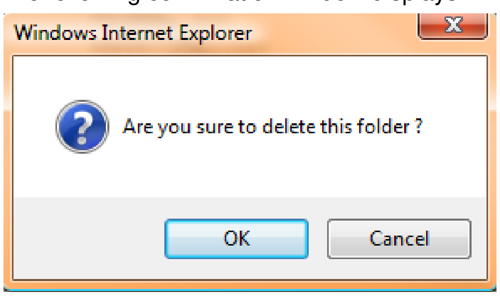
Two exercises are provided below – the first for deleting favorites folders. The second for deleting favorites items.

Task 1: Deleting an Item from Favorites

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. Select the appropriate folder from the left pane, and locate the item(s) on the right pane.
3. Click the **delete** link directly under Add to Cart.
4. A confirmation window displays and the item is deleted.

Task 2: Deleting a Folder from Favorites

1. Go to the **Favorites** navigation tab. This tab can also be accessed from the home/shop -> shop sub-tab.
2. Select the appropriate folder from the left pane, then click the Delete button at the top of the folder list.
3. The following confirmation window displays.



4. Click OK and the folder and all its items are deleted.

SHOPPING CARTS AND CHECKOUT

Lesson 7: Shopping Cart Functionality

Key Concepts

Shopping Carts

Shopping Carts represent items selected for purchase from the end user. Shopping carts contain line items that represent items, goods, or services being requested through SelectSite. The shopping cart process varies significantly for each customer due to the different SelectSite modules implemented, available functions in the shopping cart, fields required at checkout, and more. Listed below are some details related to shopping carts:

- For **Spend-Director only** sites, the shopping carts simply represent the items being requested. Since the approval process occurs outside of SelectSite, requested items do not necessarily equate to ordered items. In addition, header information is typically not tracked for shopping carts created in a Spend-Director only site.
- Users with **Shopping-only** permissions add items and/or requests to a cart, then assign the cart to another individual (requisitioner or approver) for submission.
- The term **requisitioner** is used to identify individuals that submit carts. In order to submit a cart, you must populate all required fields (if applicable).
- Depending on the site setup, by submitting a shopping cart, the request may be processed as an order, begin the approval process, or be exported to a third-party system.
- Cart options:
  - The **Simple Cart** provides a The Simple Cart provides a simplified list of items in the cart and guides users to begin the checkout or assign cart process. The Simple Cart is designed to give users an experience similar to online shopping by separating the cart from the checkout process. To keep details on the Simple Cart minimal, custom fields at the header and the line level will only be available in checkout and not on the cart. Standard actions and fields are available on the Simple Cart to allow users to edit items (e.g. Commodity codes, taxable flag, and capital expense.).
  - The **Advanced Cart** allows organizations to continue to capture required custom header and line level fields within their shopping cart. The Advanced Cart has been updated with a number of enhancements to provide a cleaner and more concise cart experience.

Exercises

Adding Items to the Cart

Items can be added to the cart through many of the screens in the application. Listed below are the different places where products can be found:

- Product Search Results – hosted items, favorite non-catalog and forms requests
- Product Details Popup
- Product Comparison
- Home page Favorites
- Quick Order
- Forms
- Punch outs
- Favorites page
- Completed Requisitions
- The exercises below demonstrate adding items to the cart from the various locations listed above. Unless otherwise noted, whenever an item is added in each of the exercises below, the system will confirm the total quantity of items added to the cart:

- The **Cart** button in the upper right corner updates reflecting the total quantity and cost of items in the cart:

BEFORE: 

AFTER: 

Step by Step

The goal of this exercise is to demonstrate adding products to a cart via multiple methods in the system. This exercise is broken down by task.

Task 1: Add items from the Product Search Results page.

1. Search for products using any of the search tools mentioned in this handbook. Search Results display below simple/advanced search.
2. Locate the item to add to the cart, enter the **quantity** and click the **Add to Cart** button.

Task 2: Add items from the Product Description popup

1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
2. Click on an item's **Product Description** to open its Product Details popup.
3. Set the desired quantity and click the **Add to Cart** button.

Task 3: Add items from Product Comparison

1. Open the Product Comparison screen as described in Using the Comparison Function on page 82. From this screen, items to cart in one of two ways:

2. Click the **Add to Cart** button for a single item.

   OR

3. Place a check in the desired items' **Select** checkboxes and choose **Add to Current Cart** in the Action Dropdown list (above or below Comparisons table).

Task 4: Add items from Favorites

1. Go to the **Favorites** tab (you can also access this tab from the link below the simple/advanced search).
2. Locate and select the appropriate personal or shared folder where the item resides.
3. From the right side of the pane, locate the item, update the defaulted quantity if needed, and click **Add to Cart**.

Task 5: Add items from Quick Order

1. From the **home/shop** tab, select **Go to: quick order** below the advanced/simple search.
2. Enter the **catalog number** for the item or items you are looking for. Click **Search**.
3. If Quick Order finds an exact match it will automatically add the product to the cart. The system also provides a comprehensive message about what was added, including Catalog Number, Description, and Supplier. The quantity is always 1
4. If it finds multiple items that meet the search criteria the system will present the standard Product Search Results screen.

Task 6: Add non-catalog items

1. Open the non-catalog item entry screen. This screen can be accessed from different parts of the application, including the forms tab and the cart, but is most often accessed from the home/shop tab, directly under the simple/advanced search. In this case, select **Go to: non-catalog item**.
2. Populate the form (refer to detailed directions earlier in this handbook), and click **Add to Cart** from the action drop-down box, then click **Go**.

Task 7: Add items from Forms

1. Go to the **Forms** tab (you can also access this tab from the link below the simple/advanced search).
2. Locate and select the appropriate personal or shared folder where the form resides.
3. From the right side of the pane, locate the form and click on the form name. The form will open up.
4. Populate the form (refer to detailed directions earlier in this handbook), and click **Add to Cart** from the action drop-down box, then click **Go**.

   See **Using Forms** in Lesson 6 for additional details about how to use Forms.

Task 8: Add items from Punch-outs

1. Go to the **home/shop -> shop** sub-tab. On this screen, punch-outs can be accessed from the **Purchasing Showcase** OR the **punch-out** section of the screen, both of which are directly below the simple/advanced search.
2. Select the icon or name for the punch-out supplier.
3. The application redirects to the supplier's punch-out site.
4. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).
5. Use the supplier's mechanism to return products to SelectSite (this process again varies from punch-out to punch-out).
6. Upon returning to SelectSite the user will be on the cart page.

Removing Items from the Advanced and Simple Carts

Items can be removed from the Advanced and Simple Carts either individually or all at once. Items are typically removed when it is determined that another product is needed instead, the item does not fit (due to cost, quantity, etc), or accidental selection.

SelectSite allows the removal of items from the cart, regardless if the item is from a form (services, goods, etc), a punch-out item, hosted catalog item, or non-catalog item.

Step by Step

The goal of this exercise is to show how one or more items can be removed from the **Advanced Cart**.

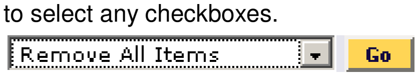
Task 1: Remove selected items from a cart

1. Go to a shopping **cart** with items in it.
2. In the cart select one or more items to remove:
3. Place a check in the **Select** checkbox in the row for each item to remove. For this exercise, leave at least one item in the cart.
4. Choose **Remove Selected Items** in the available actions list box (above the items in the cart), and click **Go**.

The system **removes** the selected items and updates the **Cart** button totals in the upper right corner of the screen.

Task 2: Remove All items from a cart

1. Go to a shopping **cart** with items in it.
2. Choose **Remove All Items** in the Action Dropdown list (above the items in the cart)—it is not necessary to select any checkboxes.



3. Press **Go**.
4. A **confirmation popup** opens. Choose **OK** to remove all items or **Cancel** to stop.
5. The system **removes** all items and updates the **Cart** button totals in the upper right corner of the screen.

Step by Step

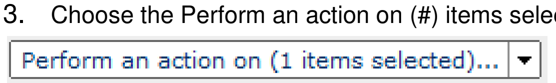
The goal of this exercise is to show how one or more items can be removed from the **Simple Cart**.

Task 1: Remove selected items from a Simple cart

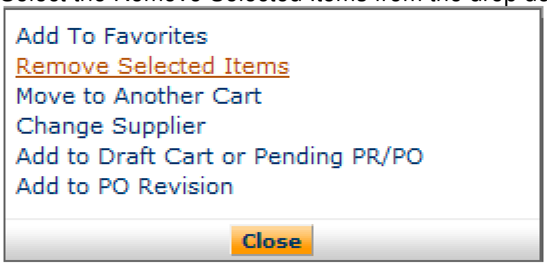
1. Go to a shopping **cart** with items in it.
2. A remove button is available to the left of the item listing
3. Click the remove button to remove the item

Task 2: Remove Multiple items from a cart

1. Go to a shopping **cart** with items in it.
2. Place a check in the Select checkbox in the row for the item to remove. For this exercise, leave at least one item in the cart.
3. Choose the Perform an action on (#) items selected



4. Select the Remove Selected Items from the drop down selection



5. The item will be removed from your cart and the drop down selection will disappear.

UPDATING ITEMS IN THE CART

Once products have been added to the shopping cart, it may be necessary to change some of the product information, such as quantity or unit price. There are different procedures for updating items from a hosted catalog, punch-out supplier, and non-catalog/form items. This exercise discusses the update options that are available.

Step by Step

The goal of this exercise is to demonstrate the available functionality around updating items in a **Simple Cart**. This exercise is broken down by task.

Task 1: Update the Quantity of a Hosted Catalog Item

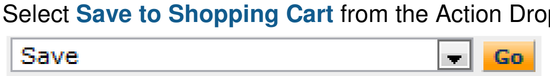
1. Go to a shopping **cart** with a **hosted catalog item** or a **form** in it.
2. In the **Quantity** field for the product modify the desired quantity.

3. Click the **Update** button at the bottom of the page.

The **TOTAL** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised amounts.

Task 2: Update information from a Form or non-catalog item (accessed via the cart)

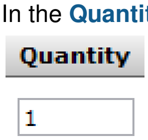
1. Go to a shopping **cart** with a form or non-catalog item in it.
2. Click on the **Product Name** in the row for the form.
3. The complete form opens.
   Update the appropriate fields (catalog #, price, etc)
4. Select **Save to Shopping Cart** from the Action Dropdown list (above or below the form)



5. The form refreshes on the screen and the **Cart** button totals update based on the new price.
6. Click on the **Cart** button to return to the current cart.

Task 3: Update a Punch-out Item

1. Go to a shopping **cart** with a **punch-out catalog item**.
2. In the **Quantity** field for the product modify the desired quantity.



3. Click the **Update** button at the bottom of the page.

The **TOTAL** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised amounts.

4. To select a different item or change configuration settings, you must select the punch-out item and go back to the punch-out site to make changes.

Task 4: Changing the supplier for multiple items

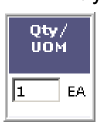
1. Go to a shopping **cart** with a **multiple items.**
2. Select the line items to change the supplier. Note: This option is only available for non-catalog and forms items.
3. From the **Perform and Action On** box, select **Change supplier**.
4. Enter or select the new supplier, the click **Save**.

Step by Step

The goal of this exercise is to demonstrate the available functionality around updating items in an **Advanced Cart**. This exercise is broken down by task.

Task 1: Update the Quantity of a Hosted Catalog Item

1. Go to a shopping cart with a hosted catalog item or a form in it.
2. In the Qty/UOM field of the row for the product to modify enter the desired quantity.



3. Click the Save Updates button at the bottom of the page.

4. The TOTAL at the bottom of the page and the Cart button in the upper right corner of the application both update with the revised amounts.

Task 2: Update information from a Form or non-catalog item (accessed via the cart)

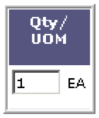
1. Go to a shopping **cart** with a form or non-catalog item in it.
2. Click on the **Product Name** in the row for the form.
3. The complete form opens.

   Update the appropriate fields (catalog #, price, etc)
4. Select **Save to Shopping Cart** from the Action Dropdown list (above or below the form)

5. The form refreshes on the screen and the **Cart** button totals update based on the new price.
6. Click on the **Cart** button to return to the current cart.

Task 3: Update a Punch-out Item

1. Go to a shopping **cart** with a **punch-out catalog item**.
2. In the **Qty/UOM** field of the row for the product to modify enter the desired quantity.



3. Click the **Save Updates** button at the bottom of the page.

The **TOTAL** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised amounts.
4. To select a different item or change configuration settings, you must select the punch-out item and go back to the punch-out site to make changes.

Task 4: Changing the supplier for multiple items

1. Go to a shopping **cart** with a **multiple items.**
2. Select the line items to change the supplier. Note: This option is only available for non-catalog and forms items.
3. From the **For selected line items drop-down** box, select **Change supplier**, then click **Go**.
4. Enter or select the new supplier, the click **Save**.

Reviewing Line Item History

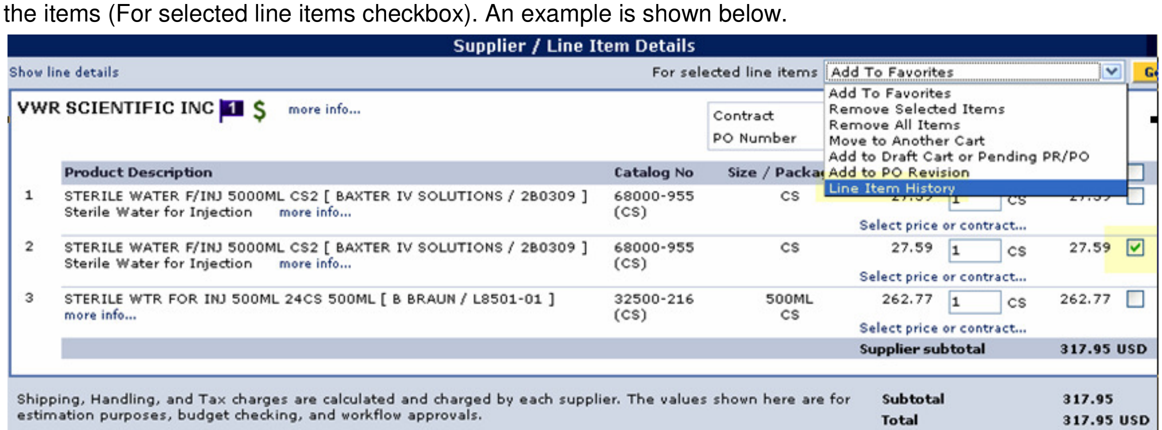
The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases.

To perform this task, users must be assigned the View Line Item History permission, which applies to both hosted catalog and punch-out items only.

Step by Step

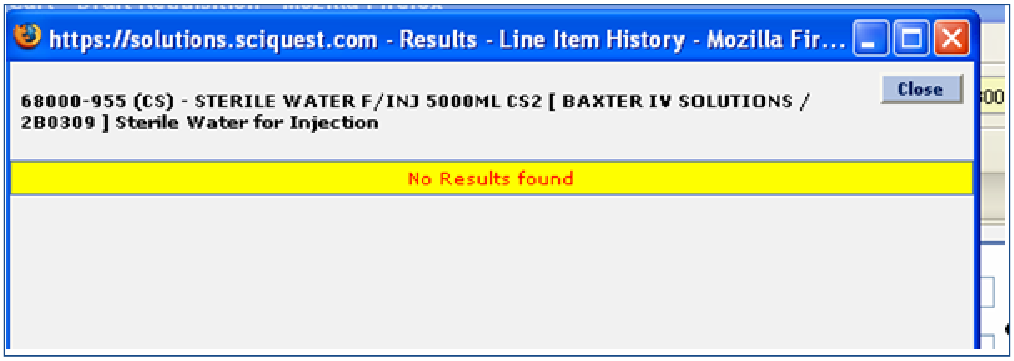
The goal of this exercise is to review a line item's purchasing history in the Advanced Cart.

1. Add **hosted catalog** or **punch-out items** to a shopping cart.
2. Access the shopping **cart**.
3. Enable the **Select** checkbox for the item, then select **Line Item History** from the drop-down box above the items (For selected line items checkbox). An example is shown below.



4. The **Line Item History popup** opens.
   a. **Previous Purchases Found**: An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including Quantity, Date, User ID and User email Address.

b. **No Previous Purchases Found:** An item having no previous purchases meeting the organization's timeframe, department, and custom field criteria (if any) will display the item's description and a message that no items were found. An example is show below.



Deleting Shopping Carts

SelectSite has no restrictions on the number of draft shopping carts that can be created. Occasionally certain carts may no longer be needed; therefore, SelectSite allows you to delete the deletion of entire shopping carts with one click.

Step by Step

The goal of this exercise is to delete a draft shopping cart.

1. Select the **Carts** navigation tab, then select the **draft carts** sub-tab.
2. Find the cart to delete, whether it is the current cart (in blue) or a draft cart (in white).
3. Press the **Delete** button on the right side of the screen. Consolidated carts with items in them appear with the **Delete** button inactive (grayed out).

> **IMPORTANT:**
>
> **The system allows deleting standard carts with products in them, but it prohibits deleting consolidated carts with products still in them. To delete a consolidated cart, delete (remove) the items from the cart, then delete the folder.**

4. After selecting **Delete**, the system deletes the cart immediately. **Once a cart is deleted, it is permanently removed and it cannot be restored.**

Creating New/Draft Carts

New carts can be created whenever necessary. Additionally, draft carts can be created for future use. With sufficient permissions, consolidated carts can be created as well.

Creating draft carts may be useful for setting up orders that are similar or that might be used later, i.e. standing orders or daily consolidated carts.

Details about the cart icons:

The **current** cart's icon is always highlighted in blue, whether Standard or Consolidated carts:

- **Standard** (non-consolidated) cart: 

- **Consolidated** cart: 

Other **draft** carts have a white background:

- **Standard** (non-consolidated) cart: 
- **Consolidated** cart: 

Step by Step

- The goal of this exercise is to create new carts and navigate through their draft carts.

1. Go to the **carts** navigation tab.
2. From the **current cart** or **draft carts** sub-tab, select the **Create Cart** button.
3. The empty cart displays. Begin entering information in the cart.

REVIEWING CART HISTORY

A History tab has been added to track activity that occurs previous to submitting a cart. This new tab is located in the Review Cart area, which can be viewed when checking out and reviewing a cart. The cart history provides a LISTING of the current line items in the cart. As items are added, a line in History is added and as items are removed from the cart, the line is removed. (NOTE: A "delete" line is not created in history). History also indicates the following:

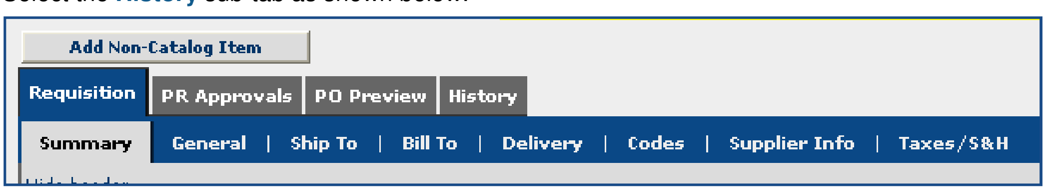
- If an item was selected from a favorite
- Details about cart assignment (if applicable), including what user was assigned the cart and when the assignment occurred.
- If the cart was created from a previous cart, and if so, the Requisition # of the previous cart.
- When items were added and by who, the product name, and line number.

NOTE: Once a cart is submitted, the cart history is removed and a snapshot of the requisition at that point is taken.

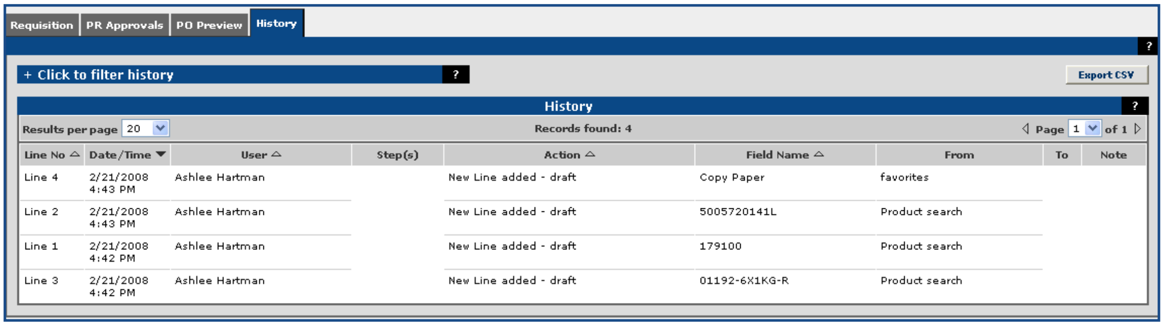
Step by Step

The goal of this exercise is to review the history for a cart.

1. Add **hosted catalog** or **punch-out items** to a shopping cart.
2. Access the **shopping cart**, then click the Review tab (across the top of the screen).
3. Select the **History** sub-tab as shown below:



4. The history for the draft cart is displayed, as shown below. As with other History trails, you can filter by date or action (approvals, modifications, etc).



Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 4	2/21/2008 4:43 PM	Ashlee Hartman		New Line added - draft	Copy Paper	favorites		
Line 2	2/21/2008 4:43 PM	Ashlee Hartman		New Line added - draft	5005720141L	Product search		
Line 1	2/21/2008 4:42 PM	Ashlee Hartman		New Line added - draft	179100	Product search		
Line 3	2/21/2008 4:42 PM	Ashlee Hartman		New Line added - draft	01192-6X1KG-R	Product search		

5. If desired, you can also export the information via a CSV file by clicking the **Export CSV** button.

Lesson 8: Checking Out

After completing all shopping, the checkout process begins. The complexity and steps involved in checking out varies per organization and per user.

Key Concepts

Assigning a Cart

Some organizations set up different "levels" of users where some of the users simply shop for items, but are not required to submit the cart. This is a nice feature, especially when the individuals ordering the items do not know the appropriate accounting codes and billing/shipping addresses.

From a terminology perspective, **shoppers assign carts to an assignee**. An assignee represents a requisitioner or approver that can submit the cart. Once the cart is submitted, it becomes a requisition and the workflow process is initiated. A shopper can assign a cart without all of the required information populated such as shipping information. In order to submit a cart, all required data must be selected.

With the standard setup, when assigning a cart to a user, one of the following occurs:

- If a default assignee is defined in the user's profile, this user displays by default. This selection can be defined by an administrator or the user if the user has the **Edit User's Cart Assignees** permission. Note: It is also assumed that the user has the **Assign Cart to Another User** permission enabled.
- If the assigned is not pre-defined, the user can click the **Click from Profile values** link to select from the user(s) set up in the user's profile, which may or may not be set up by an administrator. If no values are set up in the profile, this option does not display.

FOR MORE INFO:

To learn more about the assign cart functionality, including how a cart is assigned and how it can be unassigned (withdrawn), refer to Assigning a Cart to a Requisitioner on page 111. To learn about reviewing/approving an order assigned to Reviewing a Cart Assigned to Me on page 113.

- If the assigned is not pre-defined, the user can click the **Click to select the assignee link** to select from a list of available assignees. In order to be listed as an assignee, the user must have the **Prepare Req for Another User** permission. Note: In order to search for an assignee, the user must have both the **Edit my Profile** and **Edit User's Cart Assignees** permission.

Setup for a Shopper

Shoppers are typically allowed to shop, but cannot place an order, and instead are allowed to assign a cart to an assignee. A shopper can selected from a pre-defined list of assignees (determined by an administrator or the shopper depending on setup), or can search. Related permissions (NOTE: These must be set up by an administrator):

- **Hosted Catalog Search** and **Punch-out** – These permissions are typically granted for shoppers
- **Do not permit Place order** – This permission should be enabled if the shopper should not be allowed to submit a cart, which is the standard setup for shoppers. In some cases,

you may have a user that is a dual shopper/requisitioner where they have the option to assign the cart or submit it, and in this case, this permission should remain disabled.

- **Assign Cart to Another User** – This is in essence, the "assign cart" permission.
- **Edit My Profile** and **Edit user's Cart Assignees** – These permissions required in order for a user to set up his/her own assignees via his/her profile or search for a user. In some cases, this option will be disabled if an administrator is setting the assignee(s) up.

Setup for an Assignee

A shopper "passes" a cart to an assignee, or requester. In order to be an assignee, the following permissions must be enabled: (NOTE: These must be set up by an administrator):

- **Hosted Catalog Search** and **Punch-out** – These permissions are typically granted for assignees.
- **Prepare Req for Another User –** This permission is required (enabled) to be considered an assignee
- **Do not permit Place order** – This permission should be disabled so that he/she **can** place orders.
- **Assign Cart to Another User** – This is typically turned off for assignees, but occasionally will be enabled in the case of dual shopper/requisitioner role.

Email Notifications

Additionally, if you - as the requester – would like to receive email notifications from carts that were assigned to you and submitted, enable the following email preference: **Receive PR and PO Notifications for Cart Assigned to Me**. Email preferences are set up via the profile. By enabling this option, you will receive emails for the submitted carts based on your "standard" email preferences – workflow notifications, rejection notices, cancelations, ship notices, and backorder.

Setup for an Administrator

Administrators have the ability to search or browse all assigned carts within their organization, and either reassign them to another user or unassign them and send them back to the original requestor. This allows administrators to move carts that have been assigned to a user who may be unable to process them.

- A user must have the new **Manage Assigned Carts** permission to perform this task.

Assign Cart by Department setup

An option is available that allows an organization to control the list of possible "assignees" by **department** when assigning a cart to a user. Note: This option must be enabled by SciQuest prior to the following configuration. With this option, when the **Click to select the assignee** link is selected, the list of possible assignees are only those users that meet the following criteria:

1. The assignee has the **Prepare Req for Another User** permission enabled (standard criteria).
2. The assignee is a member of the department – or departments - that the original requester (user) has access to via Document Access (in the profile). The assignee's department is defined on the User Settings → User Identification sub-tab of their profile. If a user does not have any departmental permissions assigned then they will have access to the entire organizational list of assignees. Also the permissions view all company orders supersedes the departmental permissions in association to the assign by department. So if a user has view company orders they will see the entire list of assignees in the system no matter what their departmental permissions are.

With this option enabled, there are a few caveats and details to mention:

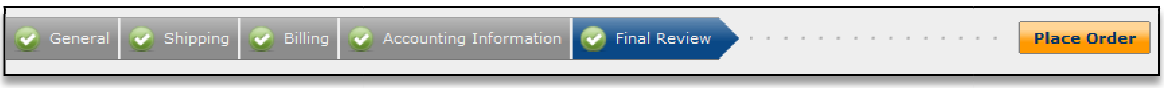
- A user's department DOES NOT determine what assignees are available to them. The department – or departments – assigned to the user via Document Access determines the list of assignees. Keep in mind, Document Access also controls access to history. For example, if the *Administration Department* is assigned to a user in Document Access, not and PO history for the Administration department.

o If a user is not assigned to a department in their profile, they will not be available as an assignee with this option enabled unless the original requester has access to **View Organizational Orders**.

Submitting a Requisition: The Checkout Process

SelectSite allows requisitioners to submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or sent to an outside system for processing.

The checkout process is accomplished through selecting the Proceed to Checkout button. (Note: The name of this button can be renamed using field management). Once the requisition enters the checkout process, they will see the required checkout steps. The navigation represents the activities required to complete and process an order. . The checkout steps are defined by the organization's preference. Also, these buttons may be named differently on-site. An explanation of each of these sections is provided below:



- **General** allows.
- **Shipping** provides a.
- **Billing** provides a detailed look at each line item,
- **Accounting Codes** provides a detailed look **Notes (Internal or External)** provides a **Final Review** allows the user to see a snapshot of what the PO will look like when processed.
- **Place Order** is the button used to complete the checkout process. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. Note: Checkout will not occur until all system errors are corrected.

The checkout process includes dialog boxes that guide the requisitioner through the checkout process. The requisitioner can follow the directions in the dialog box to work through the checkout process to complete the requisition document.

Exercises

Assigning a Cart to a Requisitioner

Some organizations use the assign cart function to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

In this exercise, we will look at the first step in the "assign cart" process where the shopper adds items to his shopping cart, possibly fill out details about the order such as accounting codes and shipping addresses, then assigns the cart to an assignee. From there, three things can happen:

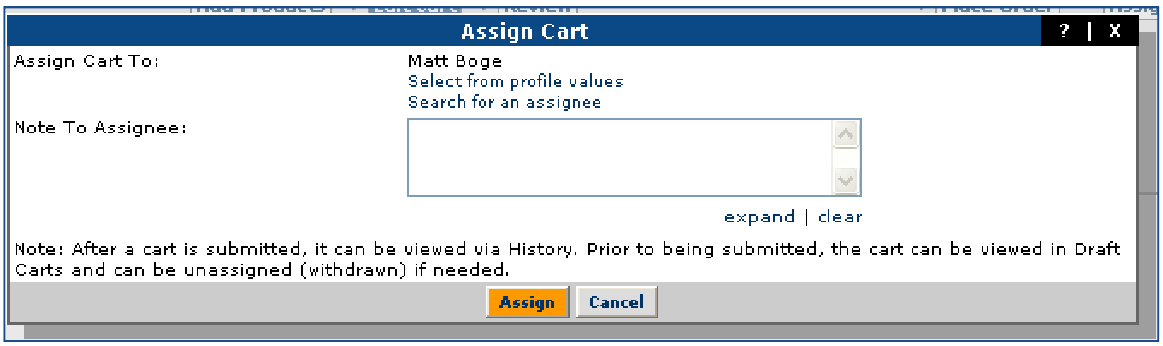
- The assignee can review the order and submit it – as discussed on Reviewing a Cart Assigned to Me.
- The shopper can withdraw his/her order, which will allow the shopper to either hold the cart or re-assign it to a new assignee. For more information, refer the last step of the exercise below.
- The requisitioner can return the cart to the shopper with comments on "why" they returned the cart.

For details about the assign cart feature, including the assignee having the appropriate permissions, refer to Assigning a Cart on page

Step by Step

The goal of this exercise is for an assignee to access shopper to add items to his cart, then assign it to an assignee for review and submission. Note: It is also assumed that the shopper has the **Assign Cart to Another User** permission enabled.

1. Add one or more items to your cart.
1. Click the **Shopping Cart** button in the upper right corner to go to the active cart.
2. If you are using an Advanced Cart with header or line details, populate the information that you know. If you are using the Simple Cart, you will not see the header or line details. You can choose to Assign the Cart from within the Cart or you can click the Proceed to Checkout button and enter any of the necessary header or line detail and Assign the Cart within the checkout process.
3. Click the **Assign Cart** button in the Cart or Checkout. The Assign Cart popup displays. An example of t his screen is shown below.

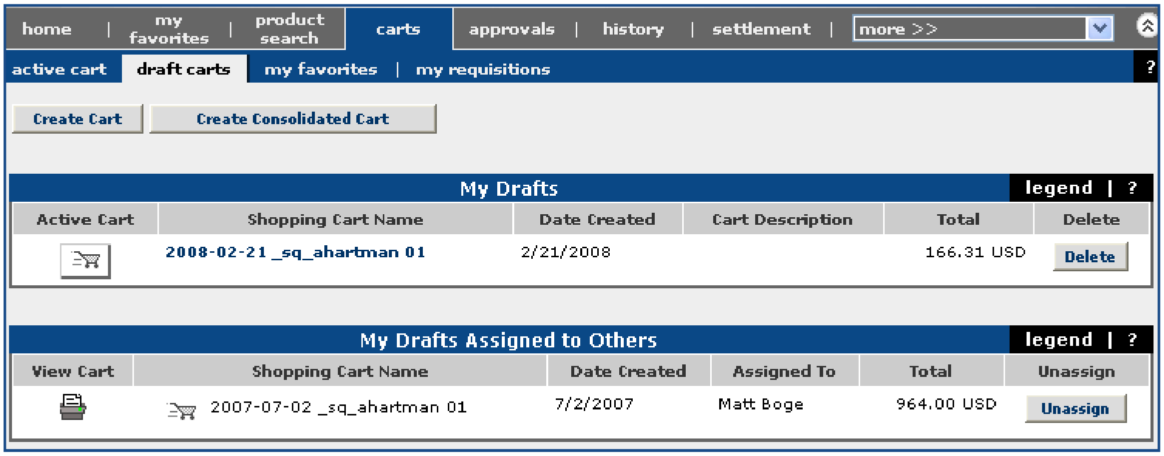


.

4. Determine the assignee:

    - If a preferred assignee is defined in the user's profile, this user displays by default (as shown above). This selection can be defined by an administrator or the user if the user has the **Edit User’s Cart Assignees** permission.
    - If the assigned is not pre-defined, the user can click the **Click from Profile values** link to select from the user(s) set up in the user's profile, which may or may not be set up by an administrator. If no values are set up in the profile, this option does not display.
    - If the assigned is not pre-defined, the user can click the **Click to select the assignee link** to select from a list of available assignees. In order to be listed as an assignee, the user must have the **Prepare Req for Another User** permission. Note: In order to search for an assignee, the user must have both the **Edit my Profile** and **Edit User's Cart Assignees** permission.

5. OPTIONAL: Enter a note to the assignee, perhaps describing the items requested, how the items were selected, or any other information about the order.
6. Click **Assign**. A shopping cart notification displays.
7. To view the previously assigned cart prior to it being submitted by the assignee, you can access it via the **carts → draft carts** tab as shown below. Click the **View Cart** icon to view details of the cart that was assigned or click the **Unassign** button to withdraw the cart assignment. From there, carts can be updated and/or reassigned.



Reviewing a Cart Assigned to Me

Some organizations use the assign cart function to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

This exercise focuses on the second part of the "assign cart" process where the shopper has already submitted the cart and it is awaiting review by the assignee (the user in this exercise).

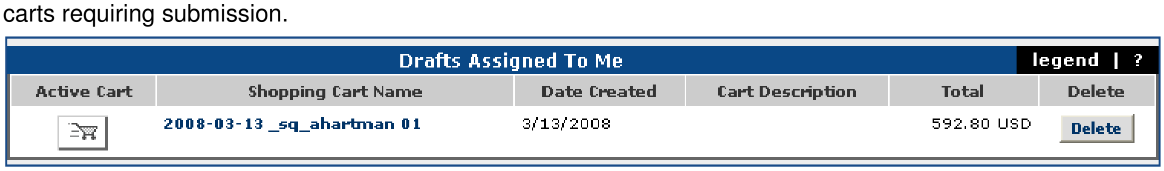
- In order to be an assignee, the **Prepare Req for Another User** permission must be enabled.
- It is recommended that assignees enable the **Cart Assigned Notice** email notification via his/her profile (**Profile → User Settings → Email Preferences → Cart Assigned Notice**).

For details about the assign cart feature, including the shopper having the appropriate permissions, refer to Assigning a Cart on page 109.

Step by Step

The goal of this exercise is for an assignee to access a cart that was assigned to him/her.

1. Once the shopper's cart is submitted, the assignee should receive an email if the notification listed above is enabled. There are two additional ways that an assignee can find about any orders requiring review:
   a. From the **Home** page, "**Carts assigned to me**" are listed in the Review section below the Organizational Message. This link can be clicked to access the screen below.
   b. Navigate to the **carts → draft carts** sub-tab. A table named **Drafts Assigned to Me** displays any carts requiring submission.



2. Click on the shopping cart name to review the order. Once all required fields are completed and the order reviewed, it can be submitted as normal. Standard cart changes – such as removing and adding line items, and changing quantities is allowed.
3. Once open, the requisitioner has the option to return the cart back to the shopper. This is important if you need more information from the shopper or if the wrong requisitioner was accidentally selected. This option is found in the upper right-hand corner in the drop-down box.

Caution: The Delete button will delete the cart from the system and the original requester will no longer be able to access the order.

Assigning a Substitute Requisitioner (for Assign Cart)

When a cart is assigned to an assignee, or requester, the cart must be submitted in order for processing to begin. If a requester is on vacation or leave, he/she can assign a **substitute** requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

When a cart is reassigned to a substitute requester, the original shopper will be notified via email.

Step by Step

The goal of the exercise is to assign a substitute assignee for processing assigned carts. This can be set up for a short period (a few hours) or a lengthy period (for example, extended leave).

1. Navigate to the **carts** navigation tab.
2. Click the draft **carts** sub-tab.
3. Click the **Assign Substitute** link, as shown below.

4. From the **User Search** popup, enter the criteria to find the user that you would like to assign as the substitute requester. Once the user criteria are entered, click the **Search** button.
5. Select the appropriate user using the radio button to the left of the user's name (**Select** button)
6. Click the **Choose Selected User** button to assign that individual as the substitute.
7. Click **End Substitution** button on the draft carts to remove the substitution setting.

Search for Assigned Carts Across Org and Reassign Carts (Admin Task)

Administrators now have the ability to search or browse all assigned carts within their organization, and either reassign them to another user or unassign them and send them back to the original requestor. This allows administrators to move carts that have been assigned to a user who may be unable to process them.

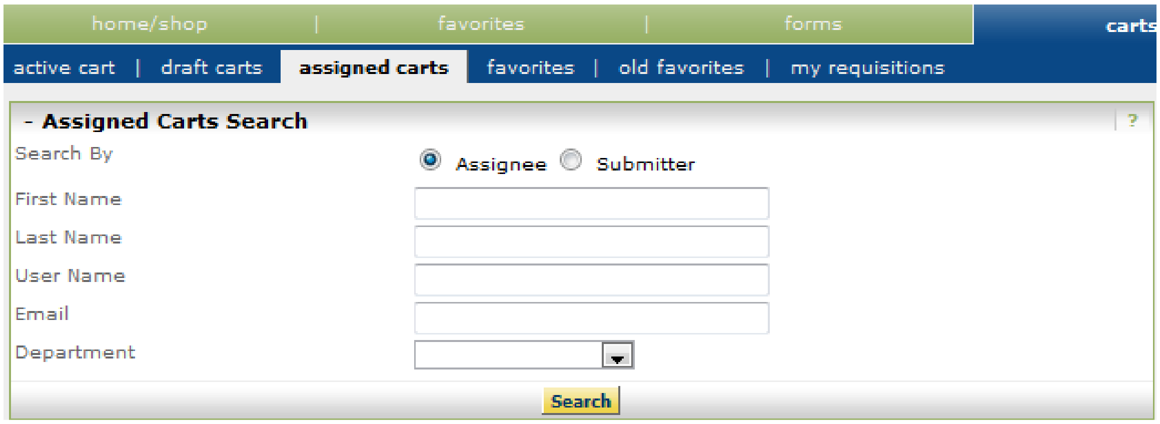
When a cart is assigned to an assignee, or requester, the cart must be submitted in order for processing to begin. If a requester is on vacation or leave, he/she can assign a **substitute** requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

When a cart is reassigned to a substitute requester, the original shopper will be notified via email.

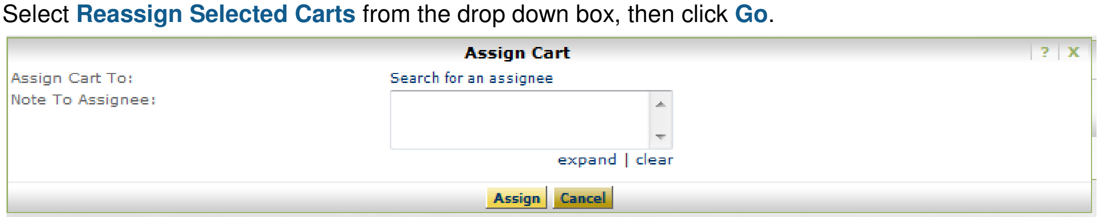
Step by Step

The goal of the exercise is to search for and locate carts that were previously assigned to a requisitioner, and to unassign a cart (optional step).

1. Navigate to the **carts** navigation tab.
2. Click the **assigned carts** sub-tab. Note: This sub-tab is only visible if you have the Manage Assigned Carts permission. The Assigned Carts Search displays.



3. This screen allows you to locate one or more carts that were assigned based on either the assignee (requisitioner) or the submitter (original shopper). Enter your search criteria, then click the Search button. **NOTE**: If not options are selected, all assigned carts will be displayed.
   a. Choose **Assignee** or **Submitter** to determine what "user" to search by. Select **Assignee** if the person who normally processes the orders is unavailable/busy. Select **Submitter** to see the original shopper's list of carts that have been assigned.
   b. Optional: In the First Name field, enter the first name of the user being searched. You can enter partial names, as long as the start of the name is present. For example, you can enter "David" or "Dav."
   c. Optional: In the Last Name field, enter the last name of the user being searched. You can enter partial names, as long as the start of the name is present. For example, you can enter "Ro" or "Rose."
   d. Optional: Enter the full username for the SelectSite user being searched.
   e. Optional: Enter the email address for the user being searched.
   f. Optional: Select the Department where the user resides. By keeping all other criteria options blank and selecting a department, you can quickly see what orders are pending for a specific department.
4. Click **Search** when the search criteria are entered. The list of assigned carts matching the query displays at the bottom of the screen.
5. From there, you can...
   a. Click on the Shopping Cart Name to view the cart.
   b. **Reassign a cart:** Enable the **Select** checkbox(es) for the cart(s) to reassign to a different user. Select **Reassign Selected Carts** from the drop down box, then click **Go**.



   c. Search and locate the NEW assignee, write a note to the new Assignee, and click **Assign**.
   d. **Unassign a cart:** Enable the **Select** checkbox(es) for the cart(s) to assign BACK to the original shopper. From there, they can determine who they would like to assign the cart to. Select **Unassign Selected Carts** from the drop down box, then click **Go**. The following message displays.

e. Select **OK**.

POPULATING HEADER DETAILS

When creating a requisition, a user can add various details to the Header Information section, such as Priority, Internal Notes and Accounting Date. This provides the end user the ability to ensure that the requisition is handled appropriately.

Splits at the Header Level

Requisitions can be split between different custom fields at the header level using amount of price. This will allow users to assign specific amounts to different accounts or codes when creating or settling an order, rather than being limited only to percent of quantity or price. For instance, if a requisition subtotal is $9000, and a given account has exactly $4000 left in it, the order can be split with $4000 applied to the limited account and $5000 applied to another account, rather than calculating those exact amounts using percentages of the requisition subtotal.

Step by Step

The goal of this exercise is to review and complete the fields at the header section for a requisition before placing the order. Note: The fields available at the Header level vary per organization.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. Click the Proceed to Checkout button to enter the checkout process. Some, or all, of the fields will be available on the General screen:
    - **Priority** - Allows user to indicate if the requisition is Urgent. Workflow can be set up to speed up processing of such urgent requisition.
    - **Description** - Allows user to add a brief description for the requisition.
    - **Prepared For** - Allows user to prepare the requisition for a different user. (Described in “Placing Orders for Other Users”)
    - **Internal Note** - Allows user to add a detailed note to the requisition that is available to approvers as the requisition goes through workflow. Such note is not sent on to suppliers.
    - **Attachments** - Allows user to attach files in various formats or links to websites. These are available to approvers as the requisition goes through workflow. Such attachments are not sent on to suppliers. The number of attachments included in the requisition appears on the tab. For example: Attachments (1)
    - **Note to All Suppliers** - Allows user to add a detailed note to the requisition which is available to approvers and is sent on to suppliers with the PO. The note is sent with all POs that are generated from the requisition.
    - **Accounting Date** - Allows user to associate an accounting date with the requisition. Users can also select account code favorites that were defined previously in their profile. This is a good option when repeat combinations are used.
3. Click the **Save** button to save the header information. Continue to the next exercise to update line item details.

POPULATING LINE ITEM DETAILS

In a requisition, various details such as Ship To address, accounting codes, and commodity codes are associated with each line item. When populating a cart, the default values from the user’s profile are used.

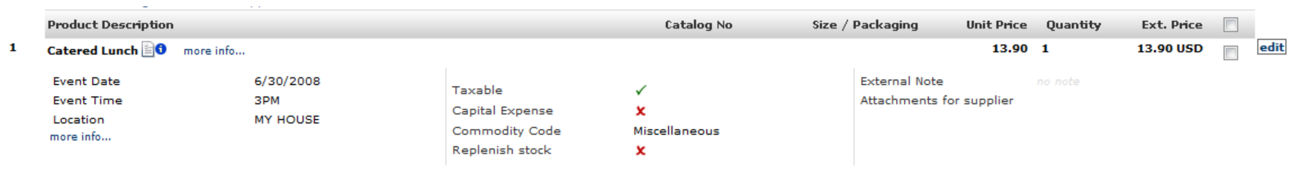
User can modify the values – per line item – as needed. This ability allows the user to ensure that each line item in the requisition has appropriate information associated with it.

Depending on the user's permissions and the application customization, access to line item details and custom fields vary.

Step by Step

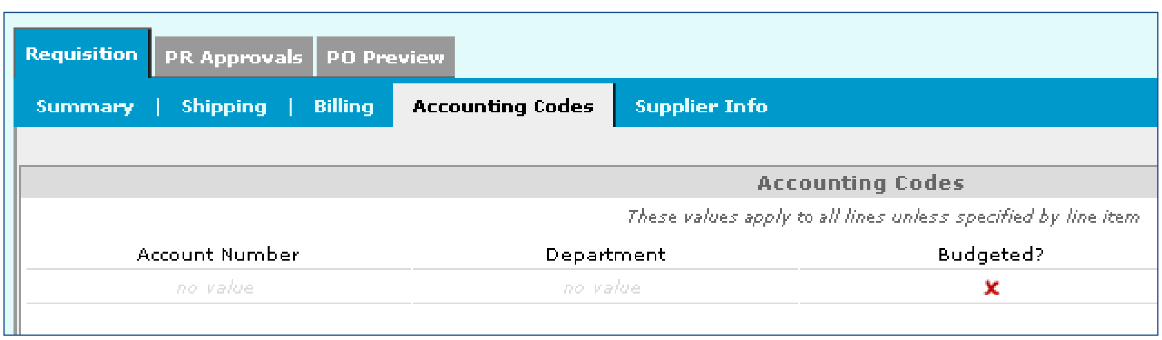
The goal of this exercise is to review and complete the fields at the line level in a requisition before submitting the order. Note: The fields available at the line level vary per organization.

1. After reviewing information at the header level (previous exercise), click the **General** step in the Checkout Navigation bar.
2. Click the **Hide Header** button to show line information only. Click on **Show Header** to display Header information. This option is located in the upper left-hand side of the window.
3. Scroll down to the Supplier/Line Item Details area of the screen. The current selections display for each line item, and are grouped by supplier. For example, if accounting codes were selected at the header level, they are filtered down to the line level here. To modify any line level selections:
   a. Click the **Show line details link** at the beginning of the supplier/line item details section. The line item will look similar to the one below:



   Click the edit button on the right side of the window to make any changes to the line item, including the assigned commodity code. NOTE: Commodity codes can now be searched via a drop-down box. If there are fewer than 50 commodity codes, the options will be listed in the drop-down box.

   b. To edit specific information for the requisition, use the tabs across the top of the cart screen as shown below (shipping, billing, etc) or you can use the Checkout Navigation bar to move from section to section.



   c. Scroll down to make changes to specific line items.
4. Tips on making changes at the line level:
   a. Whenever possible, set up the information about the requisition at the header level and work by exception at the line level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the "primary" code, then change the remaining 4.
   b. Below is a list of common "sections" on a cart, along with a description of each:
      - **Bill To** - This section displays the address to which the invoice will be sent by the supplier.
      - **Ship To** - This section displays the address to which the item will be shipped by the supplier.
      - **Delivery** - This section displays the delivery preferences such as shipping carrier, shipping date, and expedites flag.
      - **PO Number** - This section displays any specific PO Number to be used. If this field is blank, the application assigns PO Number as per rules set up in admin section.

- **Credit Card Number** - This section displays any credit card to which the line item is being charged.
- **Supplier Info** - This section displays any information that needs to be conveyed to the supplier such as Pricing Code, Account Code, and Note.
- **Codes or Accounting Codes** - This section displays various codes used by the organization so that the purchase is billed to proper grant/financial source.
- **Internal Info** - This section displays any internal note attached by the user.

c. When making edits to a sections of the cart at the line level, you must scroll to the appropriate line and section, then click the **edit** button.

d. Line level notes: After creating line level notes – internal or external, you can copy this information to additional lines by selecting the **copy to other lines** link.

e. After populating custom fields for a line, you can copy this information to additional lines by selecting the **copy to other lines** link.

f. When modifications are made at the line level, the system will indicate this by displaying the unique information. Otherwise, you will see the **(same as header)** text.

Entering Taxes and Shipping & Handling Information

In a requisition, taxes and shipping and handling (S&H) charges are associated with each line item. Application uses default values set up in supplier details. User can modify the values – per line item – as needed.

Supplier details can be set up so that all line items for the supplier will be considered taxable. The four available fields – Tax1, Tax2, Shipping and Handling – can be set up for each supplier as appropriate.

User needs to have specific permission – Allow editing of Tax, Shipping, and Handling – for this ability.

Step by Step

The goal of this exercise is populate taxes and S&H changes for single/multiple line items in a requisition before placing the order.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. Click on the **Taxes/S&H** step of the shopping cart. Just under the Header Information is a section titled **Tax, Shipping & Handling**. This section displays all line items in the requisition, grouped by supplier. For each group of line items, taxes and any shipping and handling charges are displayed along with an **Edit** button.
3. Click on the **Edit** button for the appropriate group in the **Tax, Shipping & Handling** section and edit the following:
    - **Tax1** - This field is used for first tax line and has to be turned on in the supplier details section.
    - **Tax2** - This field is used for second tax line and has to be turned on in the supplier details section.
    - **Shipping** - This field is used for shipping charges and has to be turned on in the supplier details section.
    - **Handling** - This field is used for handling charges and has to be turned on in the supplier details section.
4. Make the desired changes.
5. Click on the **Save** and Apply to Selected Products button.

Reviewing the Workflow Process

SelectSite provides a visual representation of the workflow or approval process for a purchase requisition. Each step in the process is represented by a box, along with a description of the process or step. Each step represents a manual approval step or an automated system step.

Note: Before viewing the workflow process, all the required fields must be completed on the Review Page. If any required fields are not complete, an error displays at the top of the screen asking the user to fill in the required information. After all the required fields are populated, the user is then able to look at the workflow process.

> **SUGGESTION:**
>
> **Once the Purchase Requisition workflow is complete, a Purchase Order is created. Additional approval steps may be required for the purchase order before it is sent to the supplier.**

Step by Step

The goal of this exercise is review the workflow process of the requisition and assign financial approver to the Financial Approval step (if applicable).

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. Complete all required information for the shopping cart.
3. Click on **PR Approvals** after all the required values are populated. This allows review of the requisition approval process.
4. Review the workflow process.
5. Click on the label for the workflow step for more information and help will display. If a workflow step contains a drop-down box, then this is indication of a financial approval step where a user will be required to approve the requisition before advancing to the next (or final) step. To populate this drop-down list box, complete the following steps:
6. Click on the drop-down menu and select the preferred **Financial Approver**.
7. Click the **Update** button.

Submitting the Shopping Cart

The application validates the cart and checkout steps for proper completion of the requisition. The Checkout Navigation prompts users to correct/edit appropriate details during the checkout process. Once the necessary steps are completed, the Place Order button will be activated.

Step by Step

The goal of this exercise is to complete the shopping process by submitting a cart.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. After reviewing and updating the cart, click on the **Proceed to Checkout** button in the shopping cart. If the order has any errors with associated details, the checkoutnavigation will display with a red triangle icon in the checkout step. The top yellow message box will also identify errors that the user needs to fix before placing the order. The user has the ability to fix the error in top message box or next to specific fields for each affected line item. The user can edit the values as needed (as described under the **Populating Line Item Details** section) and click on **Place Order** to submit the order.
3. One of the following scenarios applies to each organization:

- If the organization has Requisition Manager, then a requisition is created by the application, and the appropriate workflow is applied to it.
- If the organization has Ariba, PeopleSoft or other such system, then the application passes through the contents of the shopping cart to the system for further order processing.

Lesson 9: Miscellaneous Tasks

This section of the handbook contains miscellaneous tasks to help requisitioners and approvers perform their jobs.

Exercises

Copying Previous Requisitions to a New Cart

Users can copy requisitions into a completely new cart, providing a very convenient way to repeat an order. Items can be removed or additional products can be added to the cart if needed. This procedure is commonly done when orders are rejected or there is a problem for whatever reason. Instead of "restarting" the original order, a new order is created with a different number and date.

Note: Purchase requisition order history permissions are required to perform this task.

Step by Step

The goal of this exercise is to quickly reorder items by copying previous requisitions to a new cart.

1. Open the requisition to be copied:
   a. Option A: Select **My Requisitions** from the home page. After the list of your requisitions displays, select the appropriate number.
   b. Option B: Select the **History** tab, then select the **My Requisitions** sub-tab. After the list of your requisitions displays, select the appropriate number.
   c. Option C: Select the **History** tab, then select the **PR History** Tab. Perform a **PR search**, and click on the appropriate requisition number in search results. Note: Depending on your permissions, you may be able to see your requisitions, departmental requisitions, or the entire organization's requisitions.
   d. Option D: Select the **History** tab, then select the **PO History** Tab. Perform a **PO search**, and click on the appropriate requisition number in search results. Note: Depending on your permissions, you may be able to see your purchase orders, departmental purchase orders, or the entire organization's orders.
2. Select the **Copy to New Cart** action from the **Available Actions** drop-down box. This option is displayed as the default option of the Available Actions drop-down box on all tabs of a purchase requisition.
3. Select the **Go** button. A new shopping cart is created, and all line item(s) and requisition custom information are copied to this new shopping cart. The user is brought to Save Updates section of the new cart, and any previously open shopping cart is saved as a draft.

Placing Orders on Behalf of Other Users

A user can place an order for another user in the application. This functionality is mostly used when a department administrator places an order for other individuals in their department. By indicating the person they are ordering the item(s) for, the original requester can still see their order via order history, and reporting information is not compromised.

Note: The original requester must have a username in SelectSite to perform this function.

Often, a user is responsible for creating orders in SelectSite for other members of their team or department. In this scenario, the user who creates the cart for another user is considered the **Prepared By** user and the user with the original request is the **Prepared For** user. In SelectSite, the Prepared By user can see the PR and the PO(s) generated for the Prepared For user. This allows the Prepared By user to maintain visibility into a PO after they have created it.

NOTE: A significant number of email notifications are available to users who prepare orders for others. These include:

- Prepared By – PO Distribution Failure Notice
- Prepared By – Cart Assigned Notice
- Prepared By – PR rejected/returned
- Prepared By – PR line item(s) rejected
- Prepared By – PO Workflow complete
- Prepared By – PO sent to supplier
- Prepared By – PO line item(s) rejected
- Prepared By – PO rejected
- Prepared By – PO Requires Receipt Notice
- Prepared By – Invoice Requires Receipt Notice
- Prepared By – PR has lines that have been sent to bid
- Prepared By – Awarded PR is created

Option for Data Population:

An option is available that provides a quicker and more convenient process for users who frequently purchase on behalf of another user. The changes include populating the requisition with values from the Prepared For user's profile. Department buyers and other users will be able to quickly submit requisitions for other users with the correct accounting codes and address information. The following is a system setting and must be configured by an administrator: **document setup → general** and is called **"Update Custom Field and Address Values based on Prepared For user.** With this option enabled the following occurs:

- The custom field values default to the default values of the selected Prepared For user.
- The ship to and bill to addresses default to the addresses of the selected Prepared For user including contact lines.
- The custom field value personal list of the Prepared For user is merged with the list of the submitter (prepared by user). The submitter is able to choose from either his/her own list or the Prepared For user's list.
- The next approver updates to the next approver of the Prepared For user.
- The submitter continues to only see fields that he/she has access to.

Step by Step

The goal of this exercise is to place an order for another SelectSite user.

1. Create a new shopping cart by selecting **carts** and the **Create Cart** button under **draft carts**.
2. Click on **home/shop**, perform a search, and add appropriate items to the shopping cart. Once all the products are entered into the shopping cart, click on the shopping cart in top right part of the screen.
3. In the **Prepared for** field, click **Search**. The user search screen displays.
4. Enter appropriate search criteria (First Name, Last Name, Email, Department and Position are available fields), and select the **Search** button.
5. Select the desired user from the list of user(s).
6. Select the **Choose Selected User** button. The pop up window closes. On the shopping cart page, the **Prepared For** field now displays name of the selected user.
7. Select **Place Order** to complete the order.
8. The requisition is created in the name of the selected user and appears in My Requisition list of the selected user.
9. The values in the Details section of the requisition, such as Ship To and Bill To addresses and Codes, are the values from profile of the user who created the requisition and NOT profile of the selected user.

10. The header information of the requisition indicates the names of both the Prepared By user and the Prepared For user.

Viewing Document History and Comments

When a user opens a purchase requisition, a purchase order, invoice, or receipt, an audit trail is available through the **History** tab and comments are available for viewing through the **Comments** tab.

Reviewing the **Comments** and **History** for an order is a common way to track status and view an audit trail of events. Users can select to view the comments only for the document that is open (the PR, PO, etc) or for all associated information for all document types (requisition, purchase order, invoice, and receipt). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens

Step by Step

The goal of this exercise is to view the history and comments for a PR or PO in SelectSite.

1. Open the document (the PR, PO, etc). You can do this through my requisitions, my orders, through search, etc….
2. Go to the **Comments** tab to view comments. By default, only those comments for the document open display. Use the filter to view any associated comments.
3. Go to the **History** tab to view system history. By default, only those actions for the document open display. Use the filter to view the history for the associated documents.

REVIEWING AND EXPORTING HISTORY

This section of the handbook focuses on reviewing and exporting historical data from SelectSite, including purchase requisitions, purchase orders, sales order, and receipts. Requisitioners can review the details of each requisition they have placed, along with any placed orders. Departmental administrators and approvers can review orders for their department.

Lesson 10: Accessing Historical Data

This lesson focuses on performing searches, which allow you to access your purchasing and receiving data. Standard requisitioners typically can view their data only – requisitions, orders, and receipts that they initiated. For more information on viewing organization-wide orders, department orders, or orders that an approver has reviewed refer to the **Workflow and Approvals Handbook**.

Concepts

History Searching

The PR History, PO History, Sales Order History, and Receipt History tabs are used to review orders and receipts in SelectSite. The orders that a user can view and export is dependent on his/her permissions and access. Standard users will typically only be able to review their orders. Approvers can oftentimes review the orders for their department. Buyers and administrators can view system-wide orders.

The history searches are used to not only tell about "past" orders, but to access purchase requisitions and purchase orders in process to find out where they are in the workflow process. If an approver has the correct privileges, they can review an order after opening it via the History Search.

After searching for documents (PRs, POs, Sales Orders, or Receipts), the search results display at the bottom of the screen. From there, you can open individual orders and review details, including all changes and updates via the History tab.

PR and PO History

Details about any items that were rejected or approved are found in PO and PR History. Once a requisition becomes a purchase order, the data can be found through Purchase Order History, or by selecting the associated PO # link.

SCT Banner clients will also see messages from the Banner Financial system detailing the status of the requisition.

Purchase order history contains details about the purchase order process, including the items ordered and the associated requisitions. Additionally, information about order distribution is provided – including when the order was sent to the supplier and via what method.

Exercises

Reviewing My Requisitions

Submitted requisitions are all shown in a convenient place – My Requisitions. The progress of requisitions can easily be followed from this central place. Once the requisitions have been completed, they can be removed from the My Requisitions list. They are still viewable through PR History, which is discussed later in this lesson.

Step by Step

The goal of this exercise is to easily access recently placed requisitions and follow their progress

1. Access **My Requisitions**. This can be done in one of two ways:
   a. Navigate to the **Home** > Desktop page. On the left side of the screen under the **Review** section, the first item is **My Requisitions**. Click on the link to go to the My Requisitions screen.
   b. Select the history navigation menu. Then select the **My Requisitions** sub-tab to go to the My Requisitions screen.
2. Examine the My Requisitions page. A table displays the following requisition details:
   a. **Status**, **Requisition Number/Name** and **Requisition Date/Time** are displayed in columns.
   b. Each column can be used to sort the table by clicking on the small white triangle under column name. The table is sorted by default on the Requisition Date/Time column.
   c. A **Status** dropdown is displayed at the top left of the table header. It can be used to view requisitions in a specific status such as **Pending** or **Rejected**. By default, **All** requisitions are displayed in the table.
   d. Click the **Requisition Number** to access details of the specific requisition.
   e. The standard **Results per Page** selection dropdown and page navigation tools 

are available as well.
3. The last column in the table is **Remove Notification**. In this column, a **Remove** button is displayed for each of the requisitions. When clicked, the requisition is removed from the list and does not appear on the My Requisitions screen anymore. Requisitions can be accessed at any time from the history menu.

PR Search by PO Number

Purchase Requisitions generated in SelectSite can be located using related purchase order information such as purchase order date, status, and number. A single purchase requisition or a group of purchase requisitions can be retrieved based on the search criteria provided. For example, a specific PR can be searched for using its PO number(s), all PRs created in the last month, all PRs in multiple statuses, etc.

PR Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase requisitions can be viewed for the entire organization, for one or more departments, or for one's own purchase requisitions.

In this exercise, purchase requisitions are searched for by Purchase Order number, along with additional criteria.

Step by Step

The goal of this exercise is to demonstrate how purchase requisitions can be located using PO Number as search criteria

1. Go to the **History** navigation tab.
2. Select the **PR History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by PO Number** tab. From there, searching can be done in a number of different ways, each of which is discussed below:
   a. If the PO number is known, enter PO number in **the Purchase Order No field**.

b. To search by criteria other than the PO Number, click on the **Filter** checkbox. The bottom of the page becomes available for data entry and selection. Additional search criteria can be entered, such as:
   - **My Orders** and **Company Orders** – select to search only my orders or other users' orders.
   - **Start Date** and **End Date** – enter a date bracket as search criteria.
   - **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
   - **PR Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
   - **PR Status** – select the desired PR status(es).

c. After entering the search criteria, click the **Search** button. The PR Search Results display. In this case it will display a single line for the PR.

4. From the PR Search Results screen, any of the following tasks can be performed:
   - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
   - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
   - Click the **Select Query** button to run an existing query. This button is also available through the PR History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

PR Search by Requisition

Purchase Requisitions generated in the application can be located using requisition name and requisition number as search criteria. A single purchase requisition or a group of purchase requisitions can be retrieved based on the criteria entered. For example, a specific PR can be searched for by its requisition number, all PRs with a requisition name starting with specific name fragment, etc.

PR Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase requisitions can be viewed for the entire organization, for one or more departments, or for one's own purchase requisitions.

In this exercise, searching is done by requisition number or name, along with additional criteria.

Step by Step

The goal of this exercise is to search and access PRs using PR Name/Number and other parameters, such as PR status, as search criteria.

1. Go to the **History** navigation tab.
2. Select the **PR History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by Requisition** tab. From there, a number of different searches can be executed, each of which is discussed below:
   a. If the requisition number is known, enter it in the **Requisition No** field.
   b. If the requisition name or part of the requisition name is known, enter it in the **Requisition Name** field. The search returns all PRs that start with the text entered in the field. For example, there are three requisitions in the system named *Month 1 Order*, *Month 2 Order*, and *Month 3 Order*. By entering *Month* as the search criteria, all three requisitions display. By entering *Month 1*, only the first requisition displays. By entering *2 Order*, only the second order displays.
   c. To search by criteria other than the requisition name or number, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:

- **My Orders** and **Company Orders** – select to search only my orders or other user's orders.
- **Start Date** and **End Date** – enter a date bracket.
- **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
- **PR Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
- **PR Status** – select the desired PO status(es).

d. After entering the search criteria, click the **Search** button. The PR Search Results display. In this case it will display a single line for the PR.

4. From the PR Search Results screen, any of the following tasks can be performed:
    - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
    - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
    - Click the **Select Query** button to run an existing query. This button is also available through the PR History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query

PO Search by PO

Purchase Orders generated in SelectSite can be located using various PO details as search criteria such as Purchase Order Number, Purchase Order Date, and status. A single purchase order or a group of purchase orders can be retrieved based on the search criteria provided. For example, a specific PO can be searched for using its PO number, all POs created in the last month, all POs sent to a particular supplier, all POs in multiple statuses, etc.

PO Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase orders can be viewed for the entire organization, for one or more departments, or for one's own purchase orders.

In this exercise, purchase orders are searched for by Purchase Order number, along with additional criteria.

Step by Step

The goal of this exercise is to search and access POs using various PO details as search criteria.

1. Go to the **History** navigation tab.
2. Select the **PO History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by PO Number** tab. From there, searching can be done in a number of different ways, each of which is discussed below:
    a. If the PO number is known, enter PO number in **the Purchase Order No field**.
    b. To search by criteria other than the PO Number, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:
        - **My Orders** and **Company Orders** – select to search only my orders or other users' orders.
        - **Start Date** and **End Date** – enter a date bracket as search criteria.
        - **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
        - **PO Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
        - **PO Status** – select the desired PO status(es).

c. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO. For more information on accessing and viewing information from this interface, refer to

4. From the PO Search Results screen, you can perform any of the following tasks:
    - Click the **New Search** button to go back to search interface and perform a new search. Use this button when the POs displayed do not match your needs.
    - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. User can rerun a query easily without having to re-select the information.
    - Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), you can confirm/alter the criteria, then run the query.

PO Search by Requisition

Purchase Orders generated through SelectSite can be searched using requisition information such as the requisition number or name. Users can access a single purchase order or a group of purchase orders based on these criteria. E.g. a specific PO by its requisition number, all POs with requisition name starting with specific name fragment etc.

PO Search is performed in Order History section of the application. Depending on the permissions and department access assigned, you may be able to view purchase orders for your entire organization, for one or more departments, or your own purchase orders.

In this exercise, you can search by requisition number, along with additional criteria.

Step by Step

The goal of this exercise is to search and access POs using requisition name/number as search criteria.

1. Go to the **History** navigation tab.
2. Select the **Order History**, then **PO Search** button from the column on the left side of the screen. (PO Search is selected by default). The Purchase Order Search page displays.
3. Click the **by Requisition** tab. From there, you can search a number of different ways, each of which is discussed below:
    a. If you know the requisition number, enter t his information in the **Requisition No**.
    b. If you know the requisition name or part of the requisition name, enter this information in the **Requisition Name** field. The search returns all POs that start with the text entered in the field. For example, there are three requisitions in the system named *Month 1 Order*, *Month 2 Order*, and *Month 3 Order*. By entering *Month* as the search criteria, all three requisitions display. By entering *Month 1*, only the first requisition displays. By entering *2 Order*, only the second order displays.
    c. To search by criteria other than the requisition name or number, click on the **Filter** checkbox. The bottom of the page is available for data entry and selection. The user can enter additional search criteria such as:
        - **My Orders** and **Company Orders** – user can select to search only his/her orders or other user's orders as well.
        - **Start Date** and **End Date** – user can enter a date bracket as search criteria.
        - **User** – user can enter a specific user as search criteria. User can click on the Select User button when a popup window is displayed in which user can search for a specific user based on user search criteria.
        - **PO Departments** – user can enter department(s) from list as search criteria. Note: This field is only available to those users with departmental permissions.
        - **PO Status** – user can enter various PO status(es) as search criteria
    d. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO.
4. From the PO Search Results screen, any of the following tasks can be performed:

- Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
- Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
- Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

PO Search by Supplier/SKU

Purchase Orders generated in SelectSite can be located using Supplier Name and/or SKU as search criteria. A single purchase order or a group of purchase orders can be retrieved based on the criteria entered. For example, the following searches can be run: POs placed with a specific supplier, POs with specific SKUs, etc.

PO Search is performed in History section of the application. Depending on the permissions and department access assigned, purchase orders can be viewed for the entire organization, for one or more departments, or for one's own purchase orders.

In this exercise, searching is done by supplier data or SKU (catalog) number.

Step by Step

The goal of this exercise is to demonstrate how purchase orders can be searched using Supplier name or SKU number as search criteria.

1. Go to the **History** navigation path.
2. Select the **PO History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by Supplier/SKU** tab. From there, a number of different searches can be executed, each of which is discussed below:
4. Enter the supplier's full name in the **Supplier Name** field or click the **Select Supplier** button to locate and select a supplier from a list of existing suppliers.
   a. To search by supplier name or supplier information, enter the appropriate information in the **Supplier Name** field. The supplier search allows for a "contains" name search. For example, if a supplier search is performed on "Grainger," "WW Grainger, Inc." will be returned in the results. The following fields are considered:
      - Supplier Name
      - Supplier defined Alias
      - Supplier Number
      - SciQuest ID
      - Third Party Reference Number
      - Commodity Code
      - **NOTE:** Supplier Name and Supplier defined Alias use the "contains" search functionality. Supplier Number, SciQuest ID, Third Party Reference Number, and the Commodity Code are all complete match searches
   b. From the **Show Types** drop down, select to view **Hosted Catalog Suppliers.**
   c. Click the **Search** button. The search results display.
5. To search by SKU, or Catalog Number or part thereof, enter this information in the **Catalog No. (SKU)**' field.
6. To search by criteria other than supplier or SKU, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:
      - **My Orders** and **Company Orders** – user can select to search only his/her orders or other user's orders as well.
      - **Start Date** and **End Date** – user can enter a date bracket as search criteria.

- **User** – user can enter a specific user as search criteria. User can click on the Select User button when a popup window is displayed in which user can search for a specific user based on user search criteria.
- **PO Departments** – user can enter department(s) from list as search criteria. Note: This field is only available to those users with departmental permissions.
- **PO Status** – user can enter various PO status(es) as search criteria

7. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO.
8. From the PO Search Results screen, any of the following tasks can be performed:
    - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
    - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
    - Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

Lesson 11: Using Search Exports

This lesson focuses on creating and using search exports in SelectSite.

Key Concepts

Search Exports

SelectSite allows users and administrators to perform searches on purchase orders, purchase requisitions, receipts, and invoices. Based on a user's permissions, they may be able to search and review their data, data from their department (or a group of departments), or the entire organization. Searches are performed for a number of reasons, some of which are listed below:

- To see a full list of all requisitions submitted by the user
- To see a full list of all orders placed by the user
- To determine what orders are pending for your department
- To determine month-to-date information (totals, supplier info, etc)
- To locate a purchase order or purchase requisition. You can locate a specific order or requisition by the user, the number, the department, the create/modify date, and more.
- To determine which orders have been received and over-received.

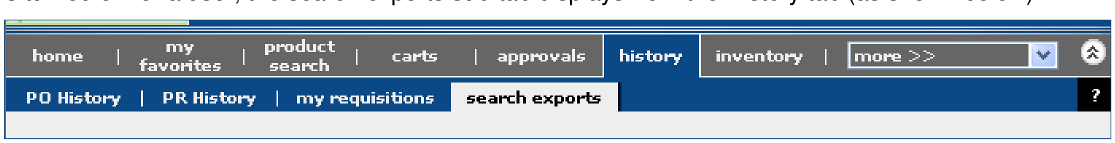
Historical data can be exported for use in reports or a third-party system. After a user requests a search export and the export is created (processed), the information can be accessed through SelectSite. By selecting a particular export, you can open a set of.csv files (stored as a zip file). From there, you can manipulate your data as needed.

NOTE: PR and PO History offer a feature that allows users to generate the export file without requiring a search to be performed first. This feature is available for purchase order and purchase requisition history. This feature is especially helpful when performing large or complicated searches that would normally take a few minutes to generate. In cases where the screen report is not needed – perhaps if monthly or weekly data is loaded into a reporting database, this step can be skipped.

NOTE:

An auto-delete feature is available in SelectSite where exported files are automatically removed after a certain number of days. Contact your administrator to see if this feature is being used and how long your files remain in the system before being removed.

A permission is associated with using search exports:

- **Export Search Results** – This permission, which is found in the **profile →permissions →orders** tab, allows a user to export whatever searches they are allowed to perform. For example, if a user is only allowed to search and view their data, they can only export their data. If a user has permission to view the entire organization's orders, they can also export this data. If this permission is turned on for a user, the search exports sub-tab displays from the History tab (as shown below):


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There are three ways you can export your data, each of which is explained below:

- **Screen Export** – exports only the information available in the search results screen for each document.
- **Transaction Export** – exports an expanded set of information on the documents.
- **Full Export** – exports the same set of data as the monthly data extracts.

Exercises

Exporting Purchasing and Invoicing Data

Users have the option of exporting data after PO, PR, Receipt, or Invoicing searches are performed. By performing searches and exporting the data, flexible, customized reporting data is available at any time.

Basics:

- You must have the appropriate search permissions to perform a PO, PR, Invoice, or Receipts search in SelectSite.
- You must have the **Export Search Results** permission enabled to export your data.
- You must have the **Manage Search Exports** permission to view company-wide exports.
- The maximum number of lines for an export file is approximately **100,000**.
- All export files will be zipped for consistency and convenience.

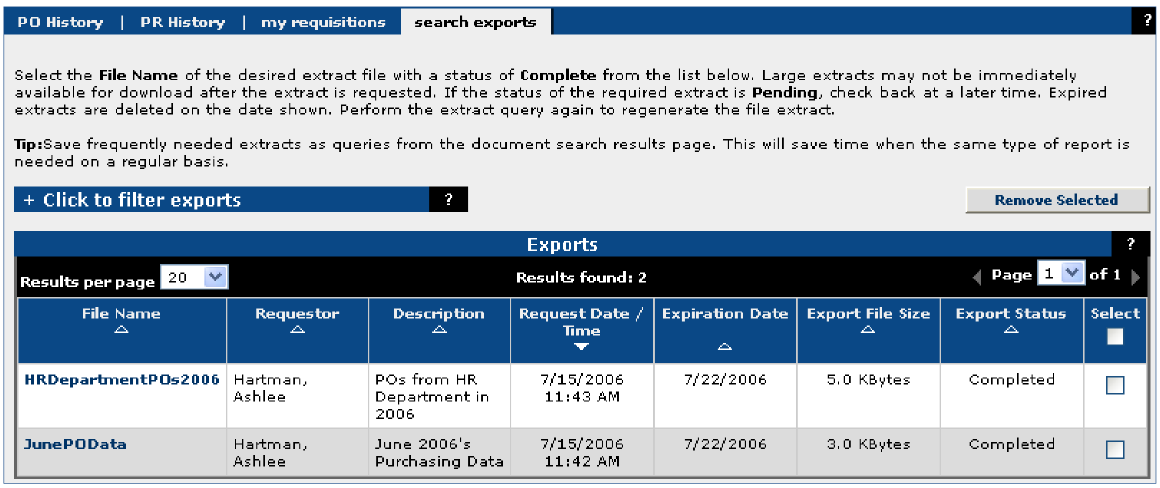
Step by Step

The goal of this exercise is to export search results, then access exported data from SelectSite. Note: For the purpose of this exercise, we will be exporting PO data, but you can also export PR, Invoice, and Receipt data.

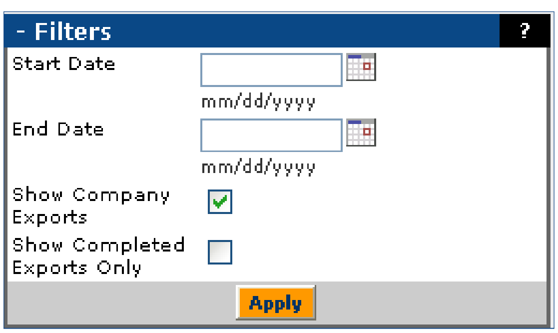
1. Determine the criteria for the data to export. Based on your permissions and organization's setup, you can use any of the following history options.
    - Query purchase order data (PO History tab)
    - Query Purchase Requisitions or Submitted carts (PR History tab)
    - Query Receipts (Receipt History)
    - Query Invoices (Invoice History)

2. For PO and PR History, you can choose to Request Export without searching and viewing the printed report. If you are interested in this option, click the Request Export button and skip to Step 4.
3. If you are performing a search first, click search and the search results display. The exception is when there is no data that meets your criteria, in which case you will be notified with a warning message. From the search results window, click the **Request Export** button. A pop-up window displays.
4. Define the export:
    - Enter the **file name**. This is a required field and is the name that will be used to reference the export. We recommend using a meaningful name such as "ScienceDept2006POData" or "Jan07Requisitions."
    - Use the **description** to describe the export and its purpose.
    - Select the **export type** from the drop-down list box. By default, the screen export is selected. An explanation of the types is listed below:
    - **Screen Export** – exports only the information available in the search results screen for each document.
    - **Transaction Export** – exports an expanded set of information on the documents.
    - **Full Export** – exports the same set of data as the monthly data extracts.

5. Click **Submit Request**. The system will begin the export process. Depending on the amount of data being exported, the export can take a few seconds or a few minutes.
6. View and access your export:
7. Go to the **history** navigation tab, then select the **search exports** sub-tab. Your export file should be listed.



8. An export status of **Completed** indicates that the file is ready to be accessed. A pending status indicates the export is not completed and cannot be opened yet. Process errors are also indicated if they ever occur.
9. To view additional exports, click the **+Click to filter exports**. Enter the criteria desired (such as company exports to view all exports), then click **Apply** to view the exports.



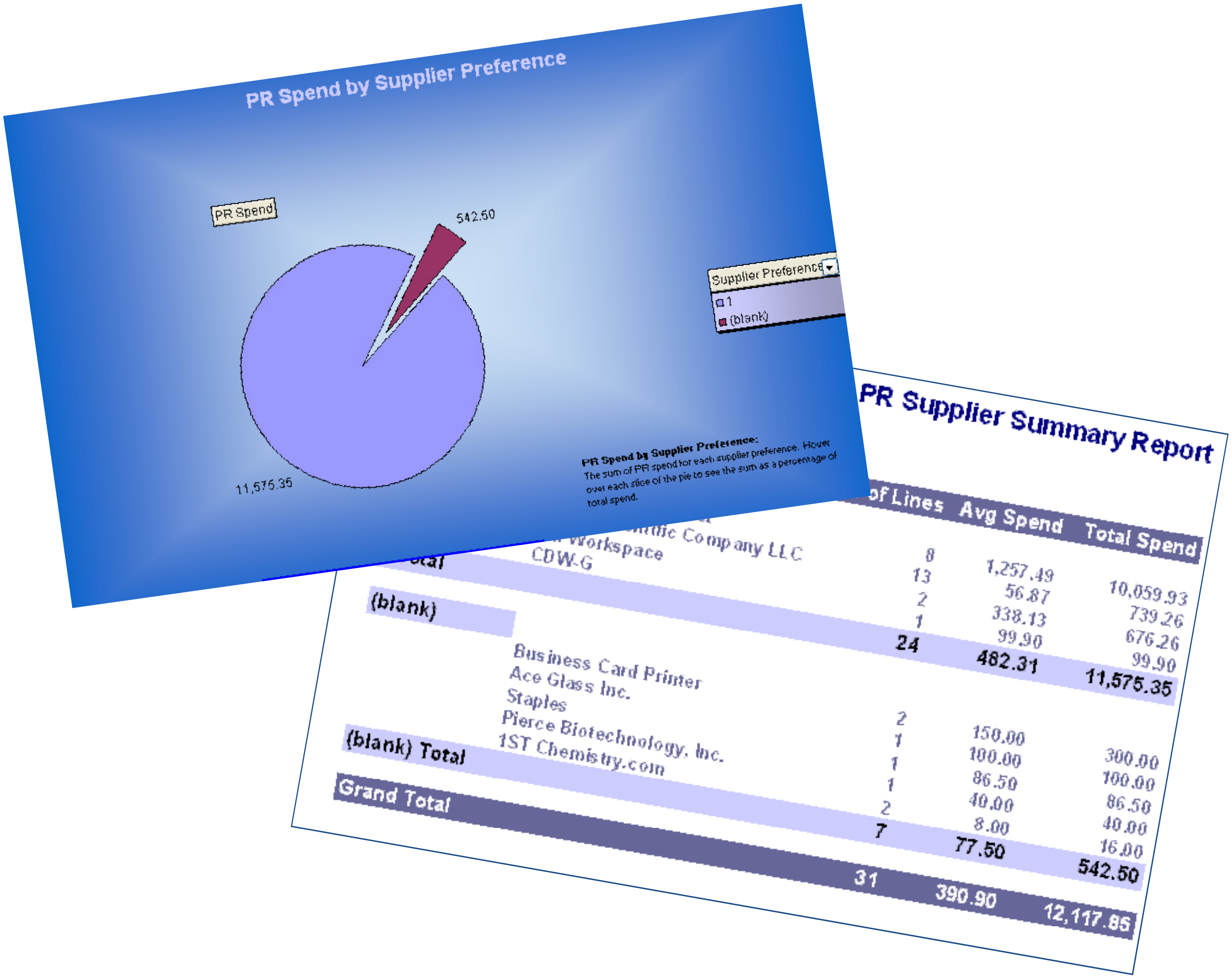
10. To access your data (for reporting, review, analysis, etc), click on the file name in the left-hand column.
11. You will be asked if you would like to Open or Save the data. We recommend that you save the file or files to your hard drive. The files are in.csv format and can be opened using MS Excel, Access, or any reporting software.

Using the PO and PR Templates

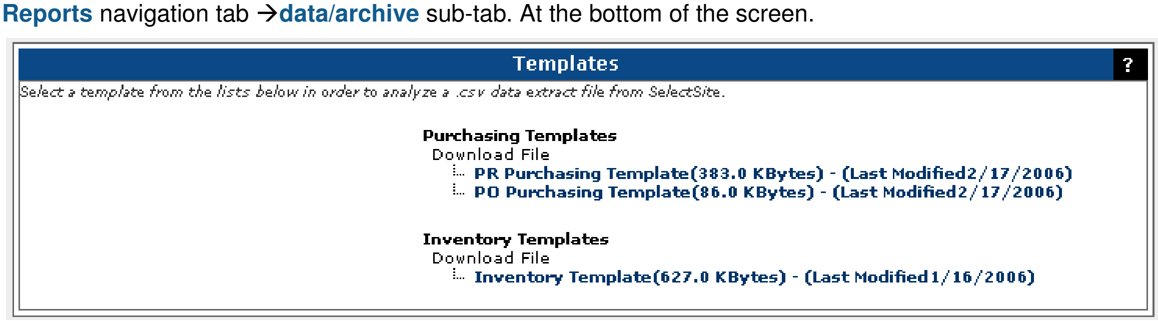
SciQuest provides templates that can be used to view purchasing and requisition data. These templates can be used with the monthly extract files AND with Full Exports of PO and PR data (generated from search results). The templates provide a more “user-friendly” way to analyze and understand your organization’s data, including supplier information, financial information, and breakdown of purchases by category, and more.

The templates are created in MS Excel, and this is where the information is displayed. There are multiple worksheets in the templates, representing different reports. Below are a few examples of the templates with populated data.

Step by Step

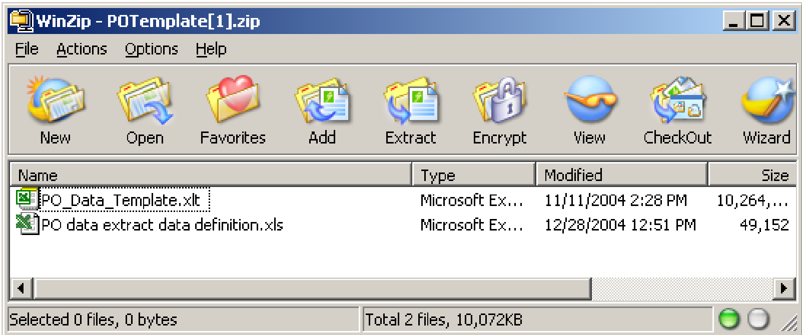


The goal of this exercise is to access report templates for PO and PR data. Detailed instructions of how to populate the spreadsheet (reports) are found in the actual templates themselves.

1. Access the PR or PO data templates. You can access the files from either of the following locations in SelectSite:
    - **History** navigation tab →**search exports** sub-tab. At the bottom of the screen.
    - **Reports** navigation tab →**data/archive** sub-tab. At the bottom of the screen.
    - 

2. There are two separate templates for Purchase Order data and Purchase Requisition (cart) data. Select the appropriate template.

3. A pop-up opens, which prompts to **Save** or **Open** the file. SciQuest suggests that you save this file locally. The contents of the.zip file should look similar to those below:



4. Note: the data extract definition file contains a detailed explanation of the template and POdata extract fields.
5. Extract or open the PO_Data_Template.xlt file or the PR_Data_Template.xlt file.
6. **Enable** Macros when asked. The template opens in MS Excel.
7. Save the file locally as an Excel template (.xlt) for future use.

TIP:

The Excel template incorporates macros. If your organization or computer does not support using external macros, the file also includes instructions for refreshing data manually. To review or modify this setting in Excel, look under the Tools menu →Macro→Security.

8. To populate the template with your data:
9. Open the template and print the instructions found on the first worksheet. It contains instructions on how to populate the template with the data from the PODate or PRData file, as well as how to update the pivot tables with that data. Follow these instructions to view the monthly data in the Purchasing Templates pivot tables.

The last worksheet in the template file details how to join the extract files using a third-party reporting application in order to generate customized report