

EPROCUREMENT SHOPPING HANDBOOK

PRODUCT VERSION 17.1



Table of Contents

WELCOME	4
Objectives	4
Key Points	4
Additional Training Resources	4
Need Help with eMACS?	4
LOCATING ITEMS FOR PURCHASE	5
Product Search with PunchOut Vendors	5
Using the Purchasing Showcase	5
FORMS AND NON-CATALOG PURCHASING	7
About Forms and Form Requests	7
Accessing Forms and Form Requests	8
Accessing Started/Submitted Form Requests from the My Forms Link	8
Completing and Submitting a Form	9
Completing and Submitting a Procurement Form Request for Catalog Items	10
Completing and Submitting a Procurement Form Request for Non-Catalog Items	11
Completing and Submitting a Check Request Form	13
Completing and Submitting a Generic Request Form	14
Completing and Submitting a Credit Memo Request Form	15
Reviewing and Filling Out Form Request Screens	16
MANAGING AND USING SHOPPING FAVORITES	21
About Item Favorites	21
Accessing the Shopping Favorites Page	21
Creating and Managing Shopping Favorites Folders	22
Making an Item a Shopping Favorite	23
Moving, Copying, or Deleting Shopping Favorites in a Favorites Folder	23
Adding Shopping Favorite Items to Your Cart	24
Searching for Shopping Favorites and Folders	25
Importing and Exporting Shopping Favorites	26
Browsing Contracts	26
SHOPPING CARTS AND CHECKOUT	28
Document Layout	28
SHOPPING CART FUNCTIONALITY	30
Shopping Carts	30
Adding Items to the Cart	30
Removing Items from the Advanced and Simple Carts	31
Updating Items in the Cart	31

Copying Previous Carts to a New Cart 33

Deleting a Shopping Cart 33

Creating a New Cart 33

Reviewing Cart History 34

CHECKING OUT 35

Assigning a Cart..... 35

Submitting a Requisition - The Checkout Process 36

Assigning a Cart to a Requisitioner 37

Assigning a Substitute Requisitioner (for Assign Cart) 38

Reviewing a Cart Assigned to Me..... 38

Reviewing the Cart Workflow Process 39

Submitting a Shopping Cart..... 39

WELCOME

Objectives

The purpose of this handbook is to familiarize users with site shopping tasks. We hope it will help you:

- Understand how to locate and select items for purchase.
- Understand the checkout process.

Key Points

- The goal of this handbook is to educate users about shopping using JAGGAER's eProcurement products; SpendDirector, Order Manager and Requisition Manager. Keep in mind that your set up may vary based on which products are licensed and in-use within your organization. Please contact your System Administrator at emacs@mt.gov if you are unsure of which products your organization is using.
- It is also 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.
- Shopping tasks range from selecting items for purchase, checking out, and approving orders. It is important to note that all end-users do not have permissions to perform each of the tasks. For example, you may only be permitted to add items to a cart and submit it for approval. If you have any questions about your specific shopping permissions, please contact your system administrator at emacs@mt.gov.

Additional Training Resources

Additional eMACS training resources such as handbooks, Quick Reference Guides (QRG), and training videos, can be found at eMACS Support Unit's website, <http://emacs.mt.gov/emacsresources>.

As well, there is a Test environment available for eMACS where all users are encouraged to test and learn more about the various applications of eMACS. Listed below are the links to the eMACS Test sites.

Note: *You cannot be in two eMACS applications at the same time using the same browser. You will need to use two different types of browsers (i.e. Internet Explorer and Google Chrome) to do so.*

Test ePass site: <https://tst.mt.gov/epass/Authn/selectIDP.html>

- Click on the Login button under Login with State Employee Account
- Login in using your State login information

Test Vendor Portal:

<https://usertest.sciquest.com/apps/Router/SupplierLogin?CustOrg=StateOfMontana>

- User Name: emacs@mt.gov
- Password: password

Test Public Bid Site:

<https://usertest-bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=StateOfMontana>

Need Help with eMACS?

Have questions on the information in this handbook? Need more information on eMACS? To ensure a timely response, email all questions or concerns about eMACS to emacs@mt.gov.

LOCATING ITEMS FOR PURCHASE

NOTE: Searching for items occurs only within PunchOut catalogs.


Product Search with PunchOut Vendors

PunchOut catalogs are integrated external links to a vendor's web-based catalog. The user exits the application to search and select products from a vendor's web catalog, then returns the items to the JAGGAER shopping cart. The selected items are then submitted through the standard requisition/order process.

When accessing a PunchOut vendor, a user is automatically authenticated to the vendor, so the vendor's website knows which organization the user is from to show the appropriate products and pricing.

IMPORTANT: The interface and usability of PunchOut shopping varies between vendors. The step-by-step instructions of how to shop on each vendor's website is not provided in the task below.

Step-by-Step

1. Navigate to [Shop](#) > [Shopping](#) > [Shopping Home](#).
2. If you know which vendor you would like to "visit" and want to go directly to the vendor's site, locate the vendor in the Purchasing Showcase. Some PunchOut vendors will also be available in the product search. To perform a keyword search, enter the search term in the simple or advanced search then click [Go](#).
3. Once the PunchOut is selected, the browser is redirected to the vendor's website. The vendor's website is framed within the JAGGAER browser window.
4. To cancel the PunchOut, select the  button at the top of the screen.
5. Once in the PunchOut site, use the appropriate search tools to find the desired products. Once all products are found, check out of the PunchOut site. The products in the PunchOut shopping cart are returned to the JAGGAER shopping cart. **Important Note:** An order is NOT being placed with the vendor when checking out of their PunchOut site. The purchasing process continues once returned to the JAGGAER application.
6. Additional products can be added to the JAGGAER shopping cart from other PunchOut vendors as well as hosted catalog vendors.

Using the Purchasing Showcase

Organizations can choose to highlight specific vendors, forms, favorites and more in one or more Purchasing Showcases. An example Purchasing Showcase is shown below. **Note:** Organizations are not required to use the Purchasing Showcase, in which case, this task would not be applicable.



Step-by-Step

1. Navigate to [Shop](#) > [Shopping](#) > [Shopping Home](#).
2. Multiple showcases may be available. For instance, the showcases may be categorized by the type of product or service a vendor provides (office supplies, chemicals, construction services, etc.) You can collapse a showcase by selecting the collapse icon in the top left corner. Important Note: The system will remember that you collapsed a showcase and it will remain collapsed until you choose to view it again.
3. Within the appropriate showcase, click on the [icon](#) in the showcase. An overlay displays options for selecting items to purchase from the vendor (example below). The options available depend on vendor settings, showcase setup and a user's individual permissions.



- Click on the [i](#) icon to display general information about the vendor.
- To do a hosted catalog search, enter a value in the [Search](#) text field and click [Q](#).
- Click the [PunchOut](#) link to access the vendor PunchOut site. For additional information about shopping from a PunchOut site, please see [Product Search with PunchOut Vendors](#).

A screenshot of a feedback form. The text inside the form reads: 'Item 12345 is not available in the catalog. Has it been discontinued?'. Below the text area, it says '930 characters remaining' and 'expand | clear'. At the bottom of the form, there is a note: 'Your name and feedback will be made available to administrators for review.' and two buttons: 'Submit' and 'Cancel'.

1. Select the [Submit](#) button. Your feedback will be submitted for review. Note that any Administrator response will be sent to the email address in your user profile.

FORMS AND NON-CATALOG PURCHASING

NOTE: Possible future functionally-not currently used.

Depending on your organization's setup, you may be able to purchase goods and services that are not available in the vendor catalogs. **Forms** are typically used to order goods and services that do not fit in to the catalog model, e.g., catering services, business cards, or temporary labor. **Non-catalog purchasing** allows shoppers to quickly add items to the shopping cart that are not found in the catalogs. Important Note: Availability of form and non-catalog purchasing depends on your organization's setup and your individual permissions. Additionally, some vendors do not allow the purchase of items outside of their catalogs through SelectSite. If you have questions about availability of these features, please contact your system administrator.

About Forms and Form Requests

Forms and form requests are typically used to order goods and services that do not fit in to the catalog model, e.g., catering services, business cards, or temporary labor. Organizations have the ability to create multiple forms/form requests for varying purposes. These are shared with shoppers who can then fill them out for purchasing. Like catalog items, forms are submitted through a shopping cart and follow an approval workflow.

Forms and form requests are created by a forms administrator. The fields included on a form or form request support the purpose. For example, a form for ordering business cards would include fields in which to enter name, address, phone number, etc. In some cases, the administrator may pre-configure a field. In the business card example, the administrator might pre-fill the address field to ensure all shoppers use a consistent address.

Forms and form requests are shared with shoppers via their Favorites.

FORMS VS. FORM REQUESTS

Forms are used exclusively to order goods and services. Forms look and feel like paper-based forms and are filled out in a similar fashion. See the example below:

General Instructions ?

Business Card Policy

The following personnel are eligible for business cards:

- faculty
- professional staff (exempt)
- graduate assistants

Identification and Title

On business cards, individuals should be identified by the official title assigned to them upon being hired. Variations on titles are permissible at the department head's discretion and with the approval of the appropriate dean.

See here for additional information regarding business card policies.

Personal Information		Supplier Information	
Name	Example Value	Supplier	Example Global Megacorp, Inc.
Title	Example Value	Currency	USD
Department	Example Value	Distribution	The system will distribute purchase orders using the method(s) indicated below: <input checked="" type="checkbox"/> Custom Supplier Distribution selected
Address			

Page Info | Debug

Form Requests can be used for purchasing requests but can also be used for requests that do not directly involve the purchase of a good or service. Form requests are filled out in a wizard-like interface. The form request steps you through entering the form data. See the example below:

The screenshot shows a web application interface for a 'Standard Procurement Request' form. On the left, there is a sidebar with a navigation menu including 'Details', 'Attachments', 'Catalog Items', and 'Review and Submit'. The main content area displays the form details for form number 30442, which is in an 'Incomplete' status. The form fields include 'Form Name' (Standard Procurement Request for C), 'Purpose' (Procurement Request), 'Template Title' (Standard Procurement Request for Desk Chairs), and 'Form Type' (Capital Expense). There are also 'Previous', 'Save Progress', and 'Next' buttons at the bottom of the form.

Accessing Forms and Form Requests

Forms and **Form Requests** are stored with your Favorites. They can be accessed by going to your Favorites but can also be accessed through the various **Form** links available in the application. The difference is that Favorites will display all favorites including item favorites, whereas accessing through the Forms link will display only the forms and form requests.

Step-by-Step

1. Access forms in one of the following ways:
 - Navigate to **Shop > Shopping**. The Shopping slide-out menu displays. In the **Go To** section click **View Forms**.
 - From the default **Shopping Home** page click the **forms** link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to **Shop > Shopping > Shopping Home** to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the **Shop** area. Click the **Forms** link located in the **Go To** section.
2. The **View Forms** page displays. Select the **Shared** or **Personal** folder to access a form or form request from that folder.

Accessing Started/Submitted Form Requests from the My Forms Link

In addition to using simple or advanced document search to locate form requests you have begun filling out or submitted, there is a quick link available from the document search menu. This link quickly takes you to a search results page that includes all your form requests with a status of **Incomplete**, **Under Review**, **Approved**, **Rejected** or **Returned**.

Step-by-Step

1. Navigate to **Documents > Document Search > My Forms**.
2. Search results will display all form requests that you have begun to fill out or submitted. The search results can be filtered as with the standard document search.

Completing and Submitting a Form

Forms look and feel like paper-based forms and are filled out in a similar manner.

Step-by-Step

1. Access forms in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Forms](#).
 - From the default [Shopping Home](#) page click the [forms](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the [Shop](#) area. Click the [Forms](#) link located in the [Go To](#) section.
2. Locate the appropriate form and click [View Form](#). The form displays in a pop-up window.
3. Enter the form data as needed. Fields may be required or optional. Required fields are in bold.
4. Choose a vendor. The vendor information is managed in the [Vendor Information](#) section on the form. In some cases, this information is already filled out (if the forms administrator entered it when creating the form). To select a vendor, use one of the following options.
 - [Enter the vendor name in the text field](#) - Begin typing a vendor name in the [Enter Vendor](#) text field. As you type the AutoComplete/Type-Ahead functionality will display matching vendors to select from. Vendors are ordered by best match and display with preference icons. The first eight matches are listed with a link to display all matches based on the entered criteria. Select the correct vendor. The vendor information displays. The preferred fulfillment center is selected by default, but it can be changed by clicking the [select different fulfillment center](#) link. In the popup window, locate the appropriate fulfillment address and click [Select](#). The fulfillment address will be updated on the form.
 - [Search for a vendor](#) - Click the [Vendor Search](#) link. Enter a value in the [Vendor](#) text box and click the [Search](#) button. Locate the appropriate vendor. If a vendor has more than one fulfillment center, there is an entry in the search results for each one. Click [Select](#) for the appropriate vendor/fulfillment center entry. The vendor information displays.
 - [Enter a vendor manually](#) - In some cases, you may have the option to enter the vendor manually. This might be necessary if you would like to submit an order form to a vendor who is not yet registered in your site. Click the [Enter Manually](#) link. Fields display in which you can enter the vendor information. Required fields are in bold. To cancel the action, click the [cancel manual entry](#) link. You will be returned to the original options.
 - To change the vendor information after it has been entered, click the [select different vendor](#) link and all vendor selection options display.
5. When you have completed filling out the form, there are several actions you can take including submitting the form to a cart, adding it to a PO revision and adding the completed form to your favorites. Locate the [Available Options](#) dropdown menu and select one of the following options. When you have made your selection, click.
 - [Add and Go to Cart](#) - Adds the form to your active cart and takes you to the cart.
 - [Add to Cart and Return](#) - Adds the form to your active cart. Instead of being taken to the cart, you remain in the form view and a new, blank form is available.
 - [Add to Cart](#) - Adds the form to your active cart with no further action.
 - [Add to Draft Cart or Pending PR/PO](#) - Adds the form to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the form, then select [Add to Draft Cart or Pending Requisition/PO](#).

- **Add to PO Revision** - Adds the form to a PO revision. When you click **Go**, a search window displays. Enter search criteria and execute the search for the PO. In the search results, click the radio button associated with the PO to which you would like to add the form, then click **Add to PO**.
- **Add to Favorites** - Adds a new form to your favorites that retains all of the entered data. The new form displays the selected vendor along with the form name in favorites.
- **Save** - Saves the form retaining the data entered.
- **Add to New Cart** - Creates a new cart and adds the form to it.

Completing and Submitting a Procurement Form Request for Catalog Items

Procurement form requests are used for purchasing goods and services. The primary difference between procurement form requests and the other purchasing forms is that the form information is accessed and configured in a wizard-like format.

There are two types of procurement form requests - catalog and non-catalog. Catalog item requests contain static items from vendor catalogs that were included on the form template by a forms administrator. Shoppers do not have the ability to add, delete or edit items. You simply provide any requested information and then submit the form.

Important Note: Forms that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete forms are automatically deleted after 180 days of inactivity.

HOW DO I KNOW IF I'M WORKING IN A PROCUREMENT FORM REQUEST?

The general information located in the top-right of the form indicates the form purpose.

Form Number	30503
Purpose	Procurement Request
Status	Incomplete
Instructions	
Details	✓








HOW DO I KNOW IF IT IS A CATALOG ITEM REQUEST?

The **Catalog Items** screen is available in the menu options.

Catalog Items ✓

Step-by-Step

1. Access forms in one of the following ways:
 - Navigate to **Shop > Shopping**. The Shopping slide-out menu displays. In the **Go To** section click **View Forms**.
 - From the default **Shopping Home** page click the **forms** link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to **Shop > Shopping > Shopping Home** to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the **Shop** area. Click the **Forms** link located in the **Go To** section.
2. Locate the appropriate form request and click **Submit Request**. The form request opens.

3. Configure the form request by moving through the steps in the wizard. As you complete each step, click the  button to save the information and remain on the page. Click the  button to save the information and move to the next step. A green check  will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the  by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see [Reviewing and Filling Out Form Request Screens](#).
 - [Instructions](#) - This page provides information that is helpful when filling out the form.
 - [Details](#) - This screen contains the highest level information about the template. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Vendor](#) - The vendor for the request is chosen in this section.
 - [Attachments](#) - An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Form Fields](#) - This option is available when the forms administrator has included fields to gather additional information about the request.
 - [Catalog Items](#) - The catalog items screen contains the items associated with the form. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.
 - [Review and Submit](#) - This section provides a summary of which sections are complete.
4. There are several options for submitting the form. Click the drop-down arrow on  and select an option. **Note:** If you manually entered a vendor, you will be prompted to enter additional information before a form can be added to a cart or document.
 - [Add the form to a new cart](#) - Clicking directly on the Add to New Cart button creates a new cart with the form and takes the user to the cart.
 - [Add and Go to Cart](#) - Adds the form to the active cart and takes you to the cart.
 - [Add and Return](#) - Adds the form to your active cart. You remain on the form which is now ready to be configured again.
 - [Add to Draft Cart or Pending PO/PR](#) - Adds the form to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the form, then select .
 - [Add to PO revision](#) - Adds the form to a PO revision. Click the option and the search window displays. Enter search criteria and execute the search. In the search results, click the radio button associated with the PO to which you would like to add the form the click .

Completing and Submitting a Procurement Form Request for Non-Catalog Items

Procurement form requests are used for purchasing goods and services. The primary difference between procurement form requests and the other purchasing forms is that the form information is accessed and configured in a wizard-like format.

There are two types of procurement form requests - catalog and non-catalog. Non-catalog procurement requests allow the forms administrator to define the items in the form without selecting them from a vendor catalog. The administrator can leave much of the information included in the form up to the shopper to enter.

Important Note: Forms that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete forms are automatically deleted after 180 days of inactivity.

HOW DO I KNOW IF I'M WORKING IN A PROCUREMENT FORM REQUEST?

The general information located in the top-right of the form indicates the form purpose.



Form Number	30503
Purpose	Procurement Request
Status	Incomplete
Instructions	
Details	✓

HOW DO I KNOW IF IT IS A NON-CATALOG ITEM REQUEST?

The Vendors and Item Attribute Default screens are available.



Suppliers	✓
Attachments	✓
Item Attribute Defaults	✓

Step-by-Step

1. Access forms in one of the following ways:

- Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Forms](#).
- From the default [Shopping Home](#) page click the [forms](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
- To access forms from a dashboard, locate the [Shop](#) area. Click the [Forms](#) link located in the [Go To](#) section.

2. Locate the appropriate form request and click [Submit Request](#). The form request opens.

3. Configure the form request by moving through the steps in the wizard. As you complete each step, click the [Save Progress](#) button to save the information and remain on the page. Click the [Next >](#) button to save the information and move to the next step. A green check ✓ will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the ✓ by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see [Reviewing and Filling Out Form Request Screens](#).

- [Instructions](#) - This page provides information that is helpful when filling out the form.
- [Details](#) - This screen contains the highest level information about the template. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.
- [Vendor](#) - The vendor for the request is chosen in this section.
- [Attachments](#) - An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. **Note:** The forms administrator may have chosen to hide this section in which case it will not be an option.
- [Vendors](#) - The Vendors section allows you to select the vendors for the form request. You have the option to select from your registered vendors or to manually include ad hoc vendors. **Note:** Additional options may display once a vendor is selected. Please see [Reviewing and Filling Out Form Request Screens](#) for additional information.

- **Item Attribute Defaults** - When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - **Form Fields** - The fields to be included in the procurement request are configured in the Form Fields section.
 - **Review and Submit** - This section provides a summary of which sections are complete.
4. There are several options for submitting the form. Click the dropdown arrow on the **Add to new Cart** and select an option. **Note:** If you manually entered a vendor, you will be prompted to enter additional information before a form can be added to a cart or document.
- **Add the form to a new cart** - Clicking directly on the Add to New Cart button creates a new cart with the form and takes the user to the cart.
 - **Add and Go to Cart** - Adds the form to the active cart and takes you to the cart.
 - **Add and Return** - Adds the form to your active cart. You remain on the form which is now ready to be configured again.
 - **Add to Draft Cart of Pending PO/PR** - Adds the form to one of these documents. A pop-up window displays all available draft carts, PRs and POs. Click the radio button associated with the cart or document to which you would like to add the form, then select **Add to Draft Cart or Pending Requisition/PO**.
 - **Add to PO revision** - Adds the form to a PO revision. Click the option and the search window displays. Enter search criteria and execute the search. In the search results, click the radio button associated with the PO to which you would like to add the form the click **Add to PO**.

Completing and Submitting a Check Request Form

Check requests are used to create accounting transactions that require a payment to be issued. They are typically used to issue refunds, payment from a clearing account or reductions of revenue. Check Requests can bypass the **Add to Cart** feature. When a Check Request has been submitted, a Non-PO Invoice will be generated with the check request information attached.

Important Note: Forms that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete forms are automatically deleted after 180 days of inactivity.

HOW DO I KNOW IF I'M WORKING IN A CHECK REQUEST FORM?



The general information located in the top-right of the form indicates the form purpose.

Form Number	30921
Purpose	Check Request
Status	incomplete
Instructions	

Step-by-Step

1. Access forms in one of the following ways:
 - Navigate to **Shop > Shopping**. The Shopping slide-out menu displays. In the **Go To** section click **View Forms**.
 - From the default **Shopping Home** page click the **forms** link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to **Shop > Shopping > Shopping Home** to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the **Shop** area. Click the **Forms** link located in the **Go To** section.

2. Locate the appropriate form request and click [Submit Request](#). The form request opens.
3. Configure the form request by moving through the steps in the wizard. As you complete each step, click the Save Progress button to save the information and remain on the page.

Click the [Next >](#) button to save the information and move to the next step. A green check  will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the  by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see [Reviewing and Filling Out Form Request Screens](#).

- [Instructions](#) - This page provides information that is helpful when filling out the form.
 - [Details](#) - This screen contains the highest level information about the template. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Vendor](#) - The vendor for the request is chosen in this section.
 - [Attachments](#) - An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Questions](#) - This option is available when the forms administrator has included questions to gather additional information about the request.
 - [Review and Submit](#) - This section provides a summary of which sections are complete.
4. When the form is ready to be entered, click Submit on the [Review and Submit](#) screen. You can also add the completed form to your favorites by clicking [Add to Favorites](#).

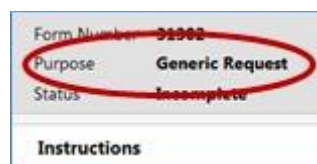
Completing and Submitting a Generic Request Form

Generic Requests are forms that are typically sent to users to request or obtain information for miscellaneous tasks or services. Generally, these will be internal requests.

Important Note: Forms that are saved but have not been submitted are assigned a status of [Incomplete](#). Incomplete forms are automatically deleted after 180 days of inactivity.

HOW DO I KNOW IF I'M WORKING IN A GENERIC REQUEST FORM?




The general information located in the top-right of the form indicates the form purpose.



Form Number:	34902
Purpose:	Generic Request
Status:	Incomplete
Instructions	

Step-by-Step

1. Access forms in one of the following ways:
 - Navigate to [Shop](#) > [Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Forms](#).
 - From the default [Shopping Home](#) page click the [forms](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop](#) > [Shopping](#) > [Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the [Shop](#) area. Click the [Forms](#) link located in the [Go To](#) section.
2. Locate the appropriate form request and click [Submit Request](#). The form request opens.

- Configure the form request by moving through the steps in the wizard. As you complete each step, click the  button to save the information and remain on the page. Click the Next button to save the information and move to the next step. A green checkmark will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the checkmark by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see [Reviewing and Filling Out Form Request Screens](#).
 - Instructions** - This page provides information that is helpful when filling out the form.
 - Details** - This screen contains the highest level information about the template. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - Vendor** - The vendor for the request is chosen in this section.
 - Attachments** - An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - Questions** - This option is available when the forms administrator has included questions to gather additional information about the request.
 - Review and Submit** - This section provides a summary of which sections are complete.
- When the form is ready to be entered, click  on the Review and Submit screen. You can also add the completed form to your favorites by clicking .

Completing and Submitting a Credit Memo Request Form

Credit memo forms requests are used to create credit memos that can be sent through form request workflow for approval. In order to submit a credit memo request a user needs to provide, at a minimum, the vendor name, vendor invoice number and amount of the credit being issued.


Important Note: Forms that are saved but have not been submitted are assigned a status of **Incomplete**. Incomplete forms are automatically deleted after 180 days of inactivity.


How do I know if I'm Working in a Credit Memo Request Form?



The general information located in the top-right of the form indicates the form purpose.

Form Number	00184
Purpose	Credit Memo Request
Status	Incomplete

Step-by-Step

- Access forms in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Forms](#).
 - From the default [Shopping Home](#) page click the [forms](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing forms from a dashboard.
 - To access forms from a dashboard, locate the [Shop](#) area. Click the [Forms](#) link located in the [Go To](#) section.
- Locate the appropriate form request and click . The form request opens.

3. Configure the form request by moving through the steps in the wizard. As you complete each step, click the  button to save the information and remain on the page.

Click the Next button to save the information and move to the next step. A green check  will display to the right of the step name indicating that all required fields have been configured for that step. Steps that are not required display the  by default. The screens listed below may be available on the form. For additional information and detailed instructions for filling out each screen, please see [Reviewing and Filling Out Form Request Screens](#).

- [Instructions](#) - This page provides information that is helpful when filling out the form.
 - [Details](#) - This screen contains the highest level information about the template. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Vendor](#) - The vendor for the request is chosen in this section.
 - [Attachments](#) - An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form. Note: The forms administrator may have chosen to hide this section in which case it will not be an option.
 - [Questions](#) - This option is available when the forms administrator has included questions to gather additional information about the request.
 - [Review and Submit](#) - This section provides a summary of which sections are complete.
4. When the form is ready to be entered, click Submit on the [Review and Submit](#) screen. You can also add the completed form to your favorites by clicking Add to Favorites.

Reviewing and Filling Out Form Request Screens

Form requests are filled out in a wizard-like interface. The form request steps you through entering the form data. The screens available or required on a form request vary based on the form purpose. This topic provides detailed information about each screen available across all form requests.

INSTRUCTIONS

The [Instructions](#) page provides information that would be helpful when filling out the form. The form creator is not required to enter instructions so this field may be blank.

DETAILS

This screen contains the highest level information about the template:

- [Form Name](#) (required) - This field defaults to the name of the form template. The user filling out the form can change the form name.
- [Purpose](#) - Indicates the purpose of the form request.
- [Template Title](#) - The template name.
- [Form Type](#) - Indicates the form type. Form types are used to categorize or classify forms. They are configured by an administrator and are specific to your organization. Please contact your system administrator for additional information about your organization's form types.
- [Currency \(Procurement Requests\)](#) - If your organization uses multiple currencies, you have the ability to select a currency different than the base (default) currency. Make a selection from the drop-down options. Note: The currency may have been selected by a forms administrator when the template was created. When this is the case, you will not have the option to select currency.

QUESTIONS

A Questions menu option may display. This option is available when the forms administrator has included questions requesting additional information about the request. Questions may be required or optional. Required questions must be answered in order to submit the form. Enter data in the fields as appropriate. Note: If no form fields were entered in the template, this menu option is not available.




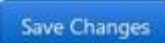
FORM FIELDS

Form Fields menu option may display. This option is available when the forms administrator has included fields requesting additional information about the request. Form fields may be required or optional. Required fields must be populated in order to submit the form (required fields are indicated by ★). Enter data in the fields as appropriate.

Note: If no form fields were entered in the template, this menu option is not available.

ATTACHMENTS

Attachments can be included on a form request. An administrator can include attachments when creating the template and those attachments are inherited in forms created from the template. Shoppers can also add attachments when filling out the form:

1. Click the  button. A pop-up window displays.
2. Click the  button. The Upload pop-up window displays.
3. Enter a title for the attachment (required). Click the  button. Locate the file on your local system and select it.
4. Click the  button to save the attachment.
5. Repeat the above steps for additional attachments.

VENDOR (FOR CREDIT MEMO REQUESTS AND CHECK REQUESTS)


[Vendor \(for credit memo requests and check requests\)](#)

Only a single vendor can be selected for credit memo and check requests. To enter a vendor:

- To choose a vendor organization that has a vendor profile in SelectSite, begin typing the vendor name in the [Vendor](#) field. The system will automatically display the matching vendors for you to select from. When you select a vendor the remit to fields will display. Fill in the information as appropriate. Note: If the vendor has Remit To addresses configured in the vendor profile, you will be asked to select from those options.
- To choose a vendor organization that does not have a vendor profile in SelectSite, click the [Enter Manually](#) link. Fields display to gather the vendor information. Fill in the information as appropriate.

VENDORS (FOR QUICK QUOTE REQUESTS)

The Vendor section allows you to select the vendors for the check request. You have the option to select from your registered vendors or to manually include ad hoc vendors.

1. Click on the Vendors option. If you have not already added a vendor, you will be taken directly to the [Add Vendors to Template](#) tab. Add a vendor using one of the following methods.
 - [Search for and Select Registered Vendors](#) - Enter the search criteria. To search by commodity code, click the button to the right of the Commodity Code field and select one or more of the available codes. When you have entered all the search criteria, click Search. The search results display. Click Select for the appropriate vendor.
 - [Manually Add a Vendor](#) - Click on  and select [Add Vendor to Template](#). A popup window displays. Enter the vendor information. Click Save.
2. The vendor displays at the top of the screen. You can change the vendor by clicking on a different vendor in the search results or manually adding a vendor.

VENDORS (FOR ALL OTHER FORM REQUESTS)

The Vendors section allows you to select the vendors for the form request. You have the option to select from your registered vendors or to manually include ad hoc vendors. A forms administrator can opt to include vendors on the template. When this is the case you can only choose from the included vendors.

The instructions below demonstrate how to add a vendor to the form request. If the form you are filling out already includes vendors, simply click Select for the appropriate vendor.

1. Click on the Vendors option.
2. Add a vendor using one of the following methods:
 - [Search for and Select Registered Vendors](#) - Enter the search criteria. To search by commodity code, click the Edit button to the right of the Commodity Code field and select one or more of the available codes. When you have entered all the search criteria, click Search. The search results display. Click Select for the appropriate vendor.
 - [Manually Add a Vendor](#) - Click on Manually Add Vendors. A popup window displays. Enter the vendor information. Required fields are noted by ★.
3. The vendor displays at the top of the screen. You can change the vendor by clicking on a different vendor in the search results or manually adding a vendor.

CODES

Note: This screen option displays only after a vendor has been selected in the [Vendor](#) screen.

On the codes screen, you can assign any splittable custom fields (generally account codes) to which you have access to on the check request. Your codes display by default and can be edited.

1. Click and the [Accounting Code](#) window displays.
2. If you have access to check request/invoice-specific code favorites, an option displays to select from those favorites. Select a code favorite option or move to the area below and select the appropriate values for the fields.
3. Click [Save](#) to save the values.
4. If appropriate, an alternate code can be applied to for items such as shipping, handling, tax, etc. Select an option from the Add alternate distribution for dropdown and then click [Go](#). Assign the appropriate values and then click [Save](#).

Codes included are automatically applied to the invoice created from the check request.

ADDITIONAL INFORMATION

Note: This screen option displays only after a vendor has been selected in the [Vendor](#) screen.

The Additional Information screen contains all other non-splittable invoice custom fields to which you have access. You have the option to enter information in these fields. Values entered in this screen will automatically be applied to the custom fields on the invoice.

CATALOG ITEMS

The catalog items screen contains the items associated with the form. These items are added by the forms administrator when the template is created. Shoppers cannot add, delete or edit catalog items.

Shoppers have the ability to add these items to their favorites folders by clicking the [Add to Favorites](#) button.

ITEM ATTRIBUTE DEFAULTS

When configuring fields with price, you can determine if the field will create a document line. Fields that are not document lines are rolled up and can be flagged with default item attributes. Forms administrators can enter data in these fields when creating the template. When that is the case, the information will automatically be inherited by forms created from the template. The shopper is not able to edit this information.

1. Click on the [Item Attributes](#) menu item.
2. Select the default items. Options include:
 - [Capital Expense](#) - Select Yes to flag rolled up items as capital expense.
 - [Taxable](#) - Select Yes to flag rolled up items as taxable.


- UNSPSC - Enter a UNSPSC code. The rolled up items will be flagged with the code.
- Catalog No. - Enter a catalog number. The rolled up items will be flagged with the number.
- Commodity Code - Enter a commodity code. The rolled up items will be flagged with the code.
- Health and Safety - Choose all of the appropriate health and safety flags to flag the rolled up items.

QUICK QUOTE REQUEST

The Quick Quote Request screen allows the user to enter any important information regarding their quick quote request. This is the body of the email that will be generated and sent to vendors that have been added to the form. To include information simply enter it in to the text box. Several formatting options are available. Note: This field can be configured by the forms administrator when the template is set up. When this is the case any forms created from the template will include this text. The shopper is not able to edit the text.





PRODUCT LINE ITEMS

The Product Line Items section allows you to manage the Quick Quote product items that will be sent to vendors for evaluation. These items will be attached to the quick quote email that is sent to all vendors that have been added to the Quick Quote Request. Note: Product line items can be configured by the forms administrator when the template is set up. When this is the case, any forms created from the template will inherit this information. The shopper is not able to edit the line items.

1. Click the  button. The **Add Product Line Item** pop-up window displays.
2. Configure the line item:
 - **Name (required):** Enter the line item name. This is usually the product name.
 - **Description:** Enter a description for the line item.
 - **Catalog Number:** If applicable, enter the catalog number for the item.
 - **Quantity (required):** Enter the quantity for the line item.
 - **Unit of Measure:** If applicable select the unit of measure for the line item from the drop-down menu
3. Click the **Save Changes** button to save the line item.
4. Repeat the above steps to include additional line items.


SERVICE LINE ITEMS

The Service Line Items section allows you to manage their Quick Quote service items that will be sent to vendors for evaluation. These items will be attached to the quick quote email that is sent to all vendors that have been added to the Quick Quote Request. Note: Service line items can be configured by the forms administrator when the template is set up. When this is the case, any forms created from the template will inherit this information. The shopper is not able to edit the line items.

1. Click the  button. The **Add Service Line Item** pop-up window displays.
2. Configure the line item:
 - **Name (required):** Enter the line item name. This is usually the product name.
 - **Description:** Enter a description for the line item.
 - **Service Start Date:** If applicable, enter a service start date. Click the  and select the date.
 - **Service End Date:** If applicable, enter a service end date. Click the  and select the date
 - **Quantity (required):** Enter the quantity for the line item.
 - **Unit of Measure:** If applicable select the unit of measure for the line item from the drop-down menu.
3. Click the  button to save the line item.

4. Repeat the above steps to include additional line items.

REVIEW AND SUBMIT

The [Review and Submit](#) section provides a summary of which sections are complete. A table displays with the [Section](#) name and a [Progress](#) column. If a section is complete, this will be indicated by a  in the Progress column. If a section is not complete, the Progress column indicates this. Actions that need to be completed display in the [Actions Needed on the Following](#) column. You can click on the action name to access the section and complete the action.

MANAGING AND USING SHOPPING 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.

About Item Favorites

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
- PunchOut Items
- Non-Catalog Items
- Populated Forms – any type – service requests, food requests, etc.

SEARCHING FOR FAVORITES

Shared 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](#).

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



MANAGING FAVORITES

The Favorites navigation menu is used to create and define shared 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 also be added through search results and the checkout screens.

Accessing the Shopping Favorites Page

Access your favorites in one of the following ways:

- Navigate to [Shop](#) > [Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
- From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop](#) > [Shopping](#) > [Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
- To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.

Creating and Managing Shopping Favorites Folders

Folders and sub folders are used to house both favorite 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 contain favorites items and forms to be used organization-wide or for a specified group of people such as a set of users, a department, a role or business unit.

It is a best practice to create folders that group items related items. For example, you may organize all products from a specific vendor into one folder. You may use another folder to organize products for a single department. Still another folder might be products for new employees. Although folders can be easily moved, it's a good idea to put some thought into your folder structure before you begin adding folders. Any folder structure can be created by adding new folders and nesting sub folders within them.

Most users do not have permissions to add, edit, or manage shared favorites or shared folders.



Step-by-Step

Note: This task focuses on adding folders from the Favorites management page. Folders can also be created when you add a favorite. Other than the "starting point" of creating the folder, the same steps can be followed.

1. Access Favorites in one of the following ways:

- Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
- From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
- To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.

2. Add a folder in one of the following ways.

- To add a top-level folder, click the  button located above the folders. Select [Top level personal folder](#) or [Top level shared folder](#).
- To add a sub-folder, locate and select the appropriate top-level folder. Click the  button and select [Subfolder of the selected folder](#).

3. Configure the folder fields. Fields with ★ are required.

- **Name:** Enter a name for the folder.
- **Internal Name:** Enter a name that the application will reference internally. This field cannot contain spaces and you will not be able to edit it once the folder is saved.
- **Description:** Enter a meaningful description for the folder.
- **Shared Folder Fields:** If you are creating a shared folder, configure the additional fields that are displayed.
- **Folder Access:** These fields allow you to choose the users with whom you will share the folder:
 - **Allow Entire Organization:** Click this checkbox to allow all users with shared folder access to view the folder.
 - **Add Access:** Choose to share the folder with a specific Business Unit, Department, Role, or User. When you make a selection from the drop-down menu, a field displays in which you can select the value. Choose the appropriate value (business unit, role, etc.).
 - **Users:** In this section, you can manage users selected in the Folder Access step. Click the appropriate radio button for the type of access you would like to grant the user or click the [remove](#) link to remove the user's access to the folder.

4. Click [Save Changes](#) to save the folder.

MANAGING FAVORITES FOLDERS

Folders can be edited, moved, copied, or deleted. In addition, you can add non-catalog items directly to a Favorites folder. These options are available from the folder actions [Folder Actions](#) menu located in the top-right corner of the folder screen. **Note:** Top-level folders cannot be copied or moved. These options are not available for top-level folders.

Making an Item a Shopping Favorite

The Favorites functionality allows you to store items that are ordered on a regular basis. Based on your permissions, you may be able to save favorites as personal favorites or as shared favorites. You can add an item or items as a favorite from the product search results, from the shopping cart, when working in forms, or from 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

1. Do a product search and locate the item you would like to add as a favorite.
2. Click the [add favorite](#) link (located below the [Add to Shopping Cart](#) button). The [Add Favorite](#) screen will display.
3. Configure the favorite. Fields with ★ are required.
 - **Step 1: Item Details**
 - **Item Nickname:** Enter a reference name for the item. **Note:** The item name is entered by default.
 - **Quantity:** Enter the default quantity for the item. For example, if you always buy five cases of paper at a time, you may want the default quantity to be 5.
 - **Description:** Enter a meaningful description for the favorite.
 - **Step 2: Select or Create a Destination Folder**
 - Select or create a folder in which to store the favorite. If you would like to add a new folder, click the [Add New](#) [Add New](#) drop-down. For information about creating favorites folders, please see [Creating and Managing Shopping Favorites Folders](#). Your personal folders will display in the [Personal](#) menu. If you have general access to one or more shared folders, those folders will display in the [Shared](#) menu.
4. Click the [Save Changes](#) button.

Moving, Copying, or Deleting Shopping Favorites in a Favorites Folder

You can 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 a personal folder to a shared folder and vice versa, as long as the user has appropriate permissions.

Step-by-Step

1. Access Favorites in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
 - From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping](#)

Home to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.



- To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.
2. Select the appropriate folder from the left pane. The folder items will display in the right pane.
 3. Take one of the following actions:
 - [Move a single item to another folder](#) by clicking on the item's [Move](#) link (located directly under [Add to Shopping Cart](#) button). A pop-up window displays. Select the appropriate folder and click [Save Changes](#). This action will take the item from the current folder and move it to the new one.
 - [Move multiple items to another folder](#) by clicking the checkbox to the far right for each item. Select [Actions for Selected Favorites](#) and select the [Move](#) option. A pop-up window displays. Select the appropriate folder and click [Save Changes](#). This action will take the items from the current folder and move them to the new one.
 - [Copy a single item to another folder](#) by clicking on the item's [Copy](#) link (located directly under [Add to Shopping Cart](#) button). A pop-up window displays. Select the appropriate folder and click [Save Changes](#). This action will copy the item to the new folder and the item will remain in the current folder.
 - [Copy multiple items to another folder](#) by clicking the checkbox to the far right for each item. Select [Actions for Selected Favorites](#) and select the [Copy](#) option. A pop-up window displays. Select the appropriate folder and click [Save Changes](#). This action will copy the items to the new folder and the items will remain in the current folder.
 - [Delete a single item from a folder](#) by clicking on the item's [Delete](#) link (located directly under [Add to Shopping Cart](#) button).
 - [Delete multiple items from a folder](#) by clicking the checkbox to the far right for each item. Select [Actions for Selected Favorites](#) and select the [Delete](#) option.

Adding Shopping 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 from shared favorites folders in addition to your own personal favorites.

Step-by-Step

1. Access Favorites in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
 - From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
 - To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.
2. On the left side of the page the folders to which you have access display. Folders are organized by [Personal](#) and [Shared](#). **Note:** If you do not have access to any shared folders, the Shared folder group do not display. Conversely, if you're organization only allows shared folders, personal folders to not display.
3. Locate the favorite(s) using one of the following methods:
 - Select the associated folder. The favorites in that folder will display on the right.

- Search for the favorite by clicking on the search button  above the folders. Enter a value in the field and click . The search results will display folder matches and item matches. Clicking on a folder match will take you to the folder and all items in that folder will be displayed. Clicking on an item match will take you to the item's folder with only that item displaying. You will have the option to display all items in the folder.
- Information about the favorites display:
- The favorite will look similar to the image below:





- The favorite details include image (if available), the item name, the vendor name, part number, manufacturer number, price per unit, and unit of measure (ea, box, carton, etc.).
 - You can change the quantity in the quantity field (located above the  button); add the favorite to the shopping cart; and edit, move, copy, or delete directly from the favorite details.
4. If necessary, change the quantity and then click the  button. You can add multiple favorites to your shopping cart. Click the checkbox located to the far right on each favorite then click  drop-down menu and select [Add to Shopping Cart](#).
 5. A success message will display below the favorites. You can click on the message to view the shopping cart.

Searching for Shopping Favorites and Folders

You have the ability to search for favorites and folders in the Favorites management screen. This is useful when you have saved a large number of Favorites or folders. Favorite search works similarly to product search. Users with permission to view and use personal favorites will be able to search personal folders. Users with permissions to view shared folders, or who have access to specific shared folder, will be able to search those folders.

Step-by-Step

1. Access Favorites in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
 - From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
 - To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.
2. On the left side of the page, click .
3. Enter a search term in the text field. The search will match on the text entered in this field. Click  to execute the search.
4. The matches display. Folder matches are displayed first, followed by Item matches. Click on the folder name to access the folder. Click on the item name to access the item within the folder.

Importing and Exporting Shopping Favorites

Shopping Favorites can be imported and exported.

Step-by-Step

1. Access Favorites in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Go To](#) section click [View Favorites](#).
 - From the default [Shopping Home](#) page click the [favorites](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
 - To access non-catalog item ordering from a dashboard, locate the [Shop](#) area. Click the [View Favorites](#) link located in the [Go To](#) section.
2. On the left side of the page, click [Import and Export](#). Take one of the following actions:
 - **Download the Template:** Click [Download Template](#). Open the template or save it to your system.
 - **Export the Favorites Items:** Click [Export](#) then click [Export Shared Favorites](#) or [Export Personal Favorites](#). A pop-up window will display. Enter a description in the [Description](#) field and click [Submit](#). You are returned to the Favorites page. The length of time it takes to export will vary based on the number of favorite items being exported. Click on the [Export requested, click here to view progress](#) link near the top of the page to check the progress of the export. You can also view exports from [Shop > Admin > Favorites Import and Export Results](#). Locate your export. If the status is set to [Completed](#), click on the export name to download the file.
 - **Import Favorites Items:** Once you have populated the template or made updates to an export file, you can import the items into the application. Click [Import](#) then click [Import Shared Favorites](#) or [Import Personal Favorites](#). A pop-up window displays. Enter a description for the import. Click the [Browse](#) button to select the import file from your system. Select an Import action: [Update Folder Contents](#) will add the items to your folders, [Replace Folder Contents](#) will replace the folder contents. Click the [Submit](#) button to submit the import. To view your import progress, go to [Shop > Admin > Favorites Import and Export Results](#) and click on the [Import](#) tab.

Browsing Contracts

This task demonstrates how a user can browse contracts to see what contracts are available. This task is oftentimes performed to find out whether or not the user should be using a specific contract/vendor for a type of purchase. For example, although you might not know the name of the contract or vendor for catering services, you could do a search for a catering contract and locate the appropriate contract.

Step-by-Step

1. Browse contracts in one of the following ways:
 - Navigate to [Shop > Shopping](#). The Shopping slide-out menu displays. In the [Browse By](#) section click [Contracts](#).
 - From the default [Shopping Home](#) page click the [contracts](#) link located at the top of the page. Often the Shopping Home page is your default home page. If it is not go to [Shop > Shopping > Shopping Home](#) to access it. **Note:** In some cases, the default Shopping Home page is replaced by one or more shopping dashboards. See below for information about accessing favorites from a dashboard.
 - To browse contracts the Shopping Home page or a dashboard, locate the [Shop](#) widget. Click the [Contracts](#) link located in the [Browse By](#) section.
2. The application takes you to the contracts navigation tab. The default contract search settings include [Active](#) and [Effective](#) contracts. Additionally, you can enter keyword information such as the contract name, purpose (such as catering), or click [advanced search options](#) for additional search options.

3. After searching, click on any of the contract numbers to view more details about the contract. Depending on your visibility privileges you may have full or partial viewing access. If you are a contract owner assigned to the contract, you will be able to edit the contract.

SHOPPING CARTS AND CHECKOUT

Document Layout

There are two different ways that documents (requisitions, purchase orders and invoices) can be displayed. Organizations have the option to choose from Classic layout, which displays the document in a tabbed format, and Updated layout, which displays the document in a menu-driven format. Available document information and functionality is the same in both layouts. The difference simply lies in the way the functionality is presented.

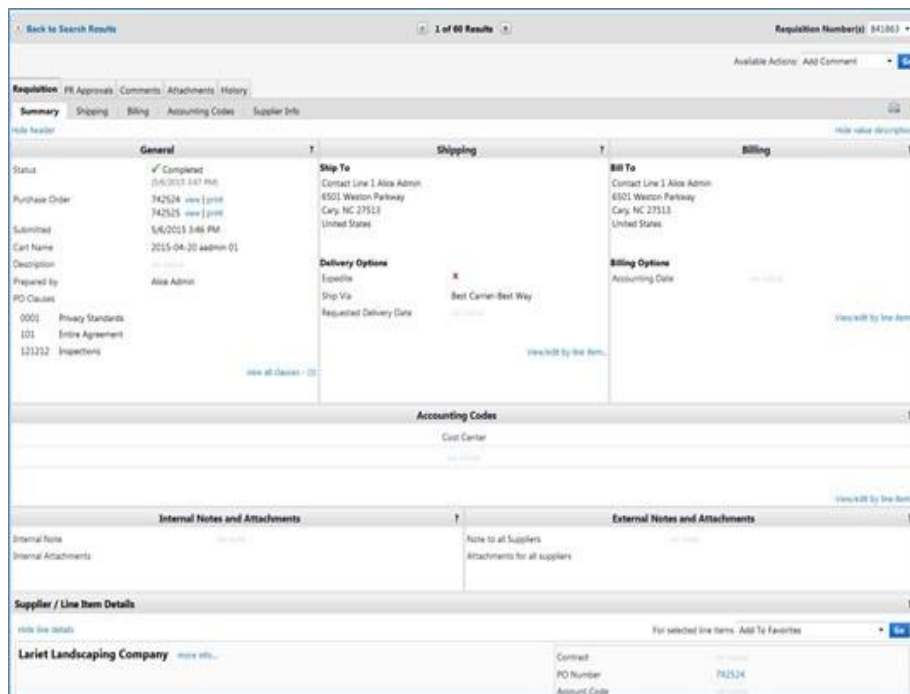
Document layout is configured by document type. Meaning, all documents do not have to have the same layout. For example, your organization may have requisitions configured to display in the Updated format while POs and invoices display in the Classic format.

Administrator's Note: For information about configuring the layout for each document type, please see [Configuring the Document Layout](#) in the online searchable help.

Classic Layout vs. Updated Layout

Classic layout displays the document in a tabbed format. Primary sections of the document are accessed from main tabs. Sections related to the main tab are located in sub-tabs.

The image below shows a requisition in the [Classic](#) layout.



Updated layout displays the document in a menu-driven format. Main sections of the document are accessed from the left-navigation menu. Sub-sections are access from sub- menu items.

The image below shows the same requisition as above in the [Updated](#) layout.

Requisition: 841863
3713-04 (2) address (3)

Status: **Completed**
Document Total: 67630 USD
View Related Documents

Requisition Summary

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachments
- External Notes and Attachments
- Supplier Information
- RF Approvals
- Comments
- Attachment Overview

Summary

Shipping

Billing

Accounting Codes

Internal Notes and Attachments

External Notes and Attachments

Lines

Larlet Landscaping Company [more info...](#)

Contract: 742524
PO Number: 742524
Account Code: 742524
Pricing Code: 742524
Quote number: 742524
PO Clauses: [add clause...](#)
[View/Hide by Line Item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ✓ Campus weed treatment	WS555	1 EA	\$99.00	1 EA	\$99.00 USD

Supplier subtotal: \$99.00 USD

The image below shows an invoice in the **Classic** layout.

Invoice Number: 349089 Supplier Account No: 123456789 Available Actions: Mark as In Process

Supplier Invoice No: INV-062714
Supplier Name: Discount Office Supplies, Inc.

Buyer Invoice Approvals Matching Comments Supplier Messages (1) Attachments History

Summary Discount, Tax, Shipping & Handling

General

Invoice Type: Invoice
Pay Status: Payable
Invoice Number: 349089
Supplier Invoice No: INV-062714
Supplier Name: Discount Office Supplies, Inc.
Create Date: 6/26/2014
Invoice Date: 6/26/2014
Discount Date: 7/11/2014
Due Date: 7/26/2014
Terms: 2.5% 15, Net 30
Terms Discount: 3.00 USD
Invoice Name: 2014-06-26 address (3)
Supplier Third Party Ref No:
Supplier No:
Invoiced By: Alice Admin
Match Status: Matched
Invoice Source: Manual
Contains substituted items: X

Addresses

From To
2399 Highwoods Boulevard
Suite 200
Raleigh, US-NC 27615
USA

Bill To
Curtis Line 1, Alice Admin
4501 Western Parkway
Cary, NC 27513
United States

Payment Information

Accounting Date: 6/26/2014
F.O.B.: Origin
Payment Method: Unknown
Record No:
Record Date:
Use Terms Discount: X

Discount, Tax, Shipping & Handling

Discount, tax, shipping & handling
Allocation: Weighted
Header-level
Terms: 3.00 USD
Discount: 0.00 USD
Tax 1: 0.00 USD
Tax 2: 0.00 USD
Shipping: 0.00 USD
Handling: 0.00 USD
Total: 117.00 USD

Codes

The image below shows the same invoice as above in the **Updated** layout.

Invoice: 349089
3714-04 (3) address (3)

Supplier Invoice No: INV-062714
Supplier: Discount Office Supplies, Inc.
Supplier Account No: 123456789
Status: Completed
Document Total: 117.00 USD
View Related Documents

Invoice Summary

- General
- Addresses
- Note/Attachments
- Payment Information
- Discount, Tax, Shipping & Handling
- Codes
- Lines

Summary

General

Addresses

Note/Attachments

Payment Information

Discount, Tax, Shipping & Handling

Codes

Lines

614443 Add more lines from this PO

PO Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ✓	Microsoft Office Standard 2003 - media	55827	EA	8.00 USD	15 EA	120.00 USD

Manufacturer: Microsoft
Name: Microsoft
Part Number: 021-06158
UNGSPC: 43-23-15-11
Taxable: X
Capital Expense: X
Line Match Status: Matched

Invoice Owner: Alice Admin
Substitute Item: X
Taxable: X

Matching Summary

	Ordered	Received	Net Invoiced
Quantity	15	15	15
Ext. Price	120.00 USD	120.00 USD	120.00 USD

Related Documents: Invoices 0 / Credits 0 / Receipts 0
Contract No:

Discount, tax, shipping & handling

	From Header	Line-level
Discount	0.00 USD	0.00 USD
Tax 1	Non-taxable	0.00 USD
Tax 2	Non-taxable	0.00 USD
Shipping	0.00 USD	0.00 USD
Handling	0.00 USD	0.00 USD

SHOPPING CART FUNCTIONALITY

Shopping Carts

Shopping Carts represent items selected for purchase from shoppers. They contain line items that represent items, goods, or services being requested.

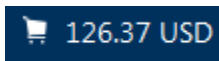
The shopping cart process varies significantly for each customer due to the different JAGGAER products implemented, available functions in the shopping cart, fields required at checkout, and more. Listed below are some details related to shopping carts:

- For [Spend-Director only](#) sites, the shopping carts simply represent the items being requested. Since the approval process occurs outside of the application, 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.

Adding Items to the Cart

The tasks 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 tasks below, the system will confirm the total quantity of items added to the cart.

The [Cart](#) button in the top banner updates reflecting the total quantity and cost of items in the cart.



Step-by-Step

TASK 1: ADD NON-CATALOG ITEMS

1. Open the non-catalog item entry screen. This screen can be accessed from different parts of the application, but is most often accessed from the [Shop](#) page, directly under the simple/advanced search. In this case, select [Go to: non-catalog item](#).
2. Populate the form and click [Add to Cart](#) from the action drop-down box, then click [Go](#).

TASK 2: ADD ITEMS FROM FORMS AND FORM REQUESTS

1. Access the [Forms](#) page. This screen can be accessed from different parts of the application, but is most often accessed from the [Shop](#) page, directly under 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 and click [Add to Cart](#) from the action drop-down box, then click [Go](#). For additional information, please see [Forms and Non-Catalog Purchasing](#).

TASK 3: ADD ITEMS FROM PUNCHOUTS

1. Access the [Shop](#) page. On this screen, PunchOuts can be accessed from the [Purchasing Showcase](#) located directly below the simple/advanced search.
2. Select the icon or name for the PunchOut vendor.
3. The application redirects to the vendor's PunchOut site.

4. Search for products and add products to the cart in the vendor's PunchOut (this process varies from PunchOut to PunchOut).
5. Use the vendor's mechanism to return products to the JAGGAER application (this process again varies from PunchOut to PunchOut).
6. Upon returning to the application 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.

Items can be removed from the cart, regardless if the item is from a form (services, goods, etc.), a PunchOut item, hosted catalog item, or non-catalog item.

Step-by-Step

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.
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 Drop-down 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.

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, PunchOut vendor, and non-catalog/form items. This task discusses the update options that are available.

Step-by-Step

UPDATING ITEMS IN A SIMPLE CART:

TASK 1: 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. The complete form opens.
3. Update the appropriate fields (catalog #, price, etc.)

Revised: 07/2017

4. Select [Save to Shopping Cart](#) from the Action Drop-down 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 2: UPDATE A PUNCH-OUT ITEM

1. Go to a shopping cart with a PunchOut 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 PunchOut item and go back to the PunchOut site to make changes.

UPDATING ITEMS IN AN ADVANCED CART

TASK 1: 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.
4. Update the appropriate fields (catalog #, price, etc.)
5. Select [Save to Shopping Cart](#) from the Action Drop-down list (above or below the form)
6. The form refreshes on the screen and the [Cart](#) button totals update based on the new price.
7. Click on the [Cart](#) button to return to the current cart.

TASK 2: UPDATE A PUNCH-OUT ITEM

1. Go to a shopping [cart](#) with a [PunchOut 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 PunchOut item and go back to the PunchOut site to make changes.

Copying Previous Carts 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

1. Locate the requisition by performing a document search.
2. Open the requisition. From the **Actions** drop-down menu select **Copy to New Cart**.
3. A new shopping cart is created with all line item(s) and requisition custom information included.

Note: When you create a new shopping cart, you will be taken to Save Updates section of the cart, and any previously open shopping cart is saved as a draft.

Deleting a Shopping Cart

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

Step-by-Step

1. Go to the **Shop > My Carts and Orders > View Draft Shopping Carts**.
2. Locate the cart to delete and click the associated Delete button.
 - The current cart is displayed in blue; draft carts are displayed in white.

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

Creating a New Cart

New carts can be created whenever necessary. You can create a cart to be used immediately or draft carts for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later, i.e. standing orders carts.

DETAILS ABOUT THE CART ICONS:

The current cart’s icon is always highlighted in blue:

- Standard (non-consolidated) cart: 

Other draft carts have a white background:

- Standard (non-consolidated) cart: 

Step-by-Step

1. Go to the **Shop > My Carts and Orders > View Draft Shopping Carts**.
2. Click the **Create Cart** button.
3. The new cart is created and displayed and you can begin adding items.

In addition, you can create a cart from within an existing cart. To do this, click the **Create New Cart** button that is displayed near the top of the cart. A new cart will be created and automatically open and become the active cart. The cart from which the new cart was created will be saved as a draft cart.

Reviewing Cart History

A History tab in the cart tracks activity that occurs previous to submitting a cart. This 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.
- If a price was changed, for which line, and the reason the price changed.

Step-by-Step

1. Add [hosted catalog](#) or [PunchOut 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.
4. The history for the draft cart is displayed. As with other History trails, you can filter by date or action (approvals, modifications, etc.).
5. If desired, you can also export the information via a CSV file by clicking the [Export CSV](#) button.

CHECKING OUT

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

Assigning a Cart

Some organizations set up different “levels” of users where some of the users simply shop for items, but do not 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 who 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 entered.

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 assignee 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 assignee is not pre-defined, the user can click the [Search for an 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.

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](#). To learn about reviewing/approving an order assigned to you refer to [Reviewing a Cart Assigned to Me](#).

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 select 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 [PunchOut](#) – 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 [PunchOut](#) – 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.

NOTIFICATIONS

Additionally, if you - as the requester – would like to receive an initial notification when a cart is assigned to you, enable the following notification preference: [Receive PR and PO Notifications for Cart Assigned to Me](#). Notification Preferences are set up via the profile.

Some organizations also have reminder notifications for cart assignment enabled. In this case, a reminder email will be sent to the shopper, assignee, or both after a specified period of time (48 hours for example), and at additional intervals. These notifications cannot be disabled by the shopper or assignee, because they serve as a necessary reminder to complete outstanding work.

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 requester. 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 [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 JAGGAER 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 [Access](#) (in the user profile). The assignee’s department is defined in the user 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(s) assigned to the user via the [Access](#) settings in the user profile determines the list of assignees. Keep in mind, [Access](#) also controls access to documents in Document Search. For example, if the Administration Department is assigned to a user in Access, not only does it work to control the list of assignees, but also allows the user full access to all documents for the Administration department in Document Search.
- 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

Requisitioners can 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. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a vendor. **Note:** Checkout will not occur until all system errors are corrected.

ADVANCED CHECKOUT VS. EXPRESS CHECKOUT

There are two types of checkout processes: [Advanced Checkout](#) and [Express Checkout](#) Advanced checkout contains several checkout steps, while Express checkout is a simpler checkout process designed for end-users who are making small purchases or do not make a lot of purchases in the system. Express checkout contains limited screens and require less information on each screen. Although the Express checkout steps

are not customizable, if your advanced checkout process is not configured to require a specific data element, Express checkout will not require it either. For example, if you do not require accounting codes, they will not be required in Express checkout.

THE CHECKOUT PROCESS

Once the requisition enters the checkout process, the required checkout steps will be available. The navigation represents the activities required to complete and process an order. The checkout steps are defined by the organization's preference and by the type of checkout process (Advanced vs. Express) in which you are working. Also, these buttons may be named differently on-site.

An explanation of each of these sections is provided below. Sections that are Advanced checkout only are noted.

- **General** (Advanced checkout only) is an overview and contains descriptive information about the requisition.
- **Shipping** contains information about the shipping and delivery instructions for the requisition.
- **Billing** contains information about the billing and payment instructions for the requisition.
- **Accounting Codes** contains organizational Accounting information that is captured with the requisition.
- **Notes (Internal or External)** contains notes and attachments related to the requisition. Internal notes are not visible to anyone outside of the organization.
- **Final Review** allows the user to see a snapshot of what the PO will look like when processed. **Note:** by default, this section is named **Order Review** in Express checkout.

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.

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 task, 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 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 task below.
- The requisitioner can return the cart to the shopper with comments on "why" they returned the cart.

Step-by-Step

Note: It is assumed that the shopper also has the [Assign Cart to Another User](#) permission enabled.

1. Add one or more items to your cart.
2. Click the [Shopping Cart](#) button in the top banner. The cart preview displays. Click the [View My Cart](#) button to access the full cart. You can also go to [Shop > My Carts and Orders > Open My Active Shopping Cart](#) to view the active cart.
3. 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.
4. Click the [Assign Cart](#) button in the Cart or Checkout.
5. Determine the assignee:

- If a preferred 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.
 - If the assignee is not pre-defined, the user can click the [Search for an 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.
6. **OPTIONAL:** Enter a note to the assignee, perhaps describing the items requested, how the items were selected, or any other information about the order.
 7. Click [Assign](#). A shopping cart notification displays.
 8. To view the previously assigned cart prior to it being submitted by the assignee, you can access it via [My Carts and Orders > View Draft Shopping Carts](#). 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.

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 task 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. Go to [Shop > My Carts and Orders > View Draft Shopping Carts](#). The [Shopping Cart - Drafts](#) page displays.
2. Click the [Assign Substitute](#) link located above the [My Drafts](#) section of the screen.
3. 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.
4. Select the appropriate user using the [Select](#) link to the right of the user's name.
5. Click [End Substitution](#) button on the draft carts to remove the substitution setting.

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 task 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 the task).

- 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](#) notification via his/her profile ([Profile > User Settings > Notification Preferences > Cart Assigned Notice](#)).

For details about the assign cart feature, including the shopper having the appropriate permissions, refer to [Assigning a Cart](#).

Step-by-Step

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:
 - Click on the [Action Items](#) in the top banner and select "Carts assigned to me".
 - Navigate to [Shop > My Carts and Orders > View Draft Shopping Carts](#). A section on the page shows [Drafts Assigned to Me](#).
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.

Reviewing the Cart Workflow Process

A visual representation of the workflow or approval process for a purchase requisition is provided. 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 vendor.

Step-by-Step

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:
 - a. Click on the drop-down menu and select the preferred [Financial Approver](#).
 - b. Click the [Update](#) button.

Submitting a 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

1. Click the [Shopping Cart](#) button in the upper right corner of the screen. The cartpreview will display. If you would like to review the cart before checking out click the [View My Cart](#) button. To proceed directly to checkout, click the [Checkout](#) button. The requisition will display.
2. If there are any errors or additional information required before the cart can be submitted, that information will display at the top of the screen. Fix these errors as necessary.
3. Submit the order:
 - If your organization manages requisitions through the application the [Assign Cart](#) button displays. Click the button to assign the cart to an approver.
 - If your organization manages requisitions outside of the application, the [Place Order](#) button displays. Click the button to send the order.