Minnesota State Marketplace

User Guide

Minnesota State University Moorhead

January 2018

Minnesota State Marketplace – Basic User Guide

Shopping through Purchase Order

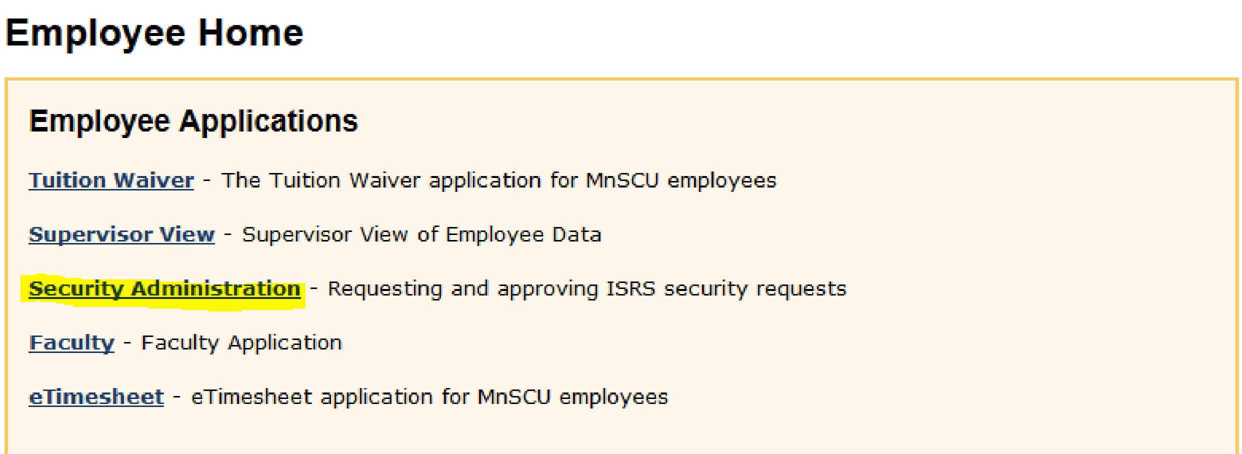
Contents

Introduction and overview

Minnesota State **Marketplace** is our new e-procurement solution that automates most procurement processes. The system allows users to procure goods by shopping in an online marketplace that provides both catalog and non-catalog options. Users place goods in a shopping cart and initiate a series of workflow events, reviews, and approvals. This tool will increase efficiency as approvals are obtained electronically, and purchase orders are distributed automatically to vendors. A strong control environment is maintained by restricting user privileges to specific roles, and keeping logs of user activity. This guide will introduce users to the system, and cover basic navigational techniques. As users become familiar with the system they can customize the **Marketplace** for their needs with dashboards and advanced navigational techniques.

System access and security roles

Request access to the system by logging in to your Minnesota State Employee Home page and selecting Security Administration under Employee Applications.

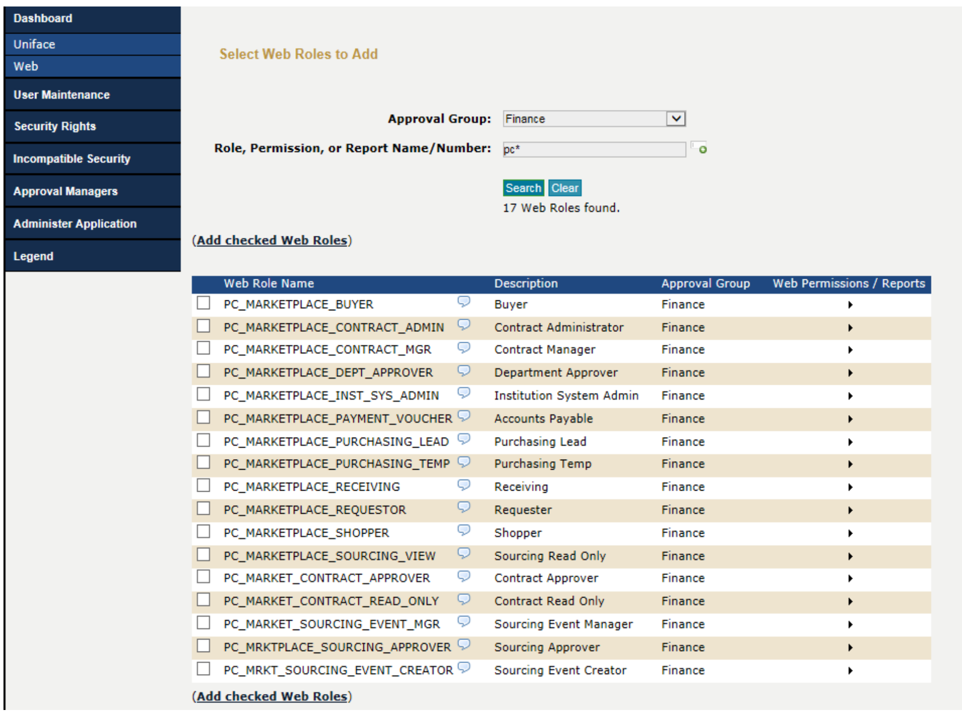


On the "Dashboard" tab (blue field on left), select "Web"

a. Select "add web roles"
b. In Approval Group select "Finance"
c. In Role, Permission, or Report Name type "pc" (to filter for e-procurement roles)
d. From the list select the role(s) needed and then click "Add checked web roles"
    i. **Note:** if you need help determining which role(s) to choose contact your supervisor or your C/U System Administrator/Superuser. Role descriptions listed below.
        1. **Shopper:** These users can shop for items, and submit a cart to requestor for processing.
        2. **Requestor:** These users can shop for items and submit carts that they created or carts that were assigned/forwarded to them from a shopper. They also are responsible for confirming receipt of orders
        3. **Approver:** These users can review (approve, return, or reject) purchase requests that are assigned to them.
        4. **Buyer:** The lower level of regular purchasing employee for an institution, with access to create and/or process orders to an institution defined level of authority.

5. **Purchasing Temp:** A student or temporary purchasing employee for an institution, with limited access to create and/or process orders to an institution defined level of authority.
6. **Purchasing Lead:** The Purchasing Lead role would be given in addition to the Buyer role, and is the higher level of regular purchasing employee for an institution, with access to create and/or process orders to an institution defined level of authority, and who manage the day to day system activities. These users would often be given access to conduct sourcing events and manage contracts.
7. **Accounts Payable:** This user would be able to view and create invoices and receiving records to complete the three way match and approve payments for processing. Their approvals will interface to ISRS directly to initiate payments, bypassing the current PO Payoff process in Web Accounting.
8. **Receiving:** This role provides the capability of recording the receipt of goods and noting exceptions or issues.

e. You will receive a notification once your request is reviewed and approved or denied.


Dashboard
Uniface
Web
User Maintenance
Security Rights
Incompatible Security
Approval Managers
Administer Application
Legend

Select Web Roles to Add

Approval Group: Finance

Role, Permission, or Report Name/Number: pc*

Search Clear

17 Web Roles found.

(Add checked Web Roles)

Web Role Name	Description	Approval Group	Web Permissions / Reports
PC_MARKETPLACE_BUYER	Buyer	Finance	
PC_MARKETPLACE_CONTRACT_ADMIN	Contract Administrator	Finance	
PC_MARKETPLACE_CONTRACT_MGR	Contract Manager	Finance	
PC_MARKETPLACE_DEPT_APPROVER	Department Approver	Finance	
PC_MARKETPLACE_INST_SYS_ADMIN	Institution System Admin	Finance	
PC_MARKETPLACE_PAYMENT_VOUCHER	Accounts Payable	Finance	
PC_MARKETPLACE_PURCHASING_LEAD	Purchasing Lead	Finance	
PC_MARKETPLACE_PURCHASING_TEMP	Purchasing Temp	Finance	
PC_MARKETPLACE_RECEIVING	Receiving	Finance	
PC_MARKETPLACE_REQUESTOR	Requester	Finance	
PC_MARKETPLACE_SHOPPER	Shopper	Finance	
PC_MARKETPLACE_SOURCING_VIEW	Sourcing Read Only	Finance	
PC_MARKET_CONTRACT_APPROVER	Contract Approver	Finance	
PC_MARKET_CONTRACT_READ_ONLY	Contract Read Only	Finance	
PC_MARKET_SOURCING_EVENT_MGR	Sourcing Event Manager	Finance	
PC_MRKTPLACE_SOURCING_APPROVER	Sourcing Approver	Finance	
PC_MRKT_SOURCING_EVENT_CREATOR	Sourcing Event Creator	Finance	

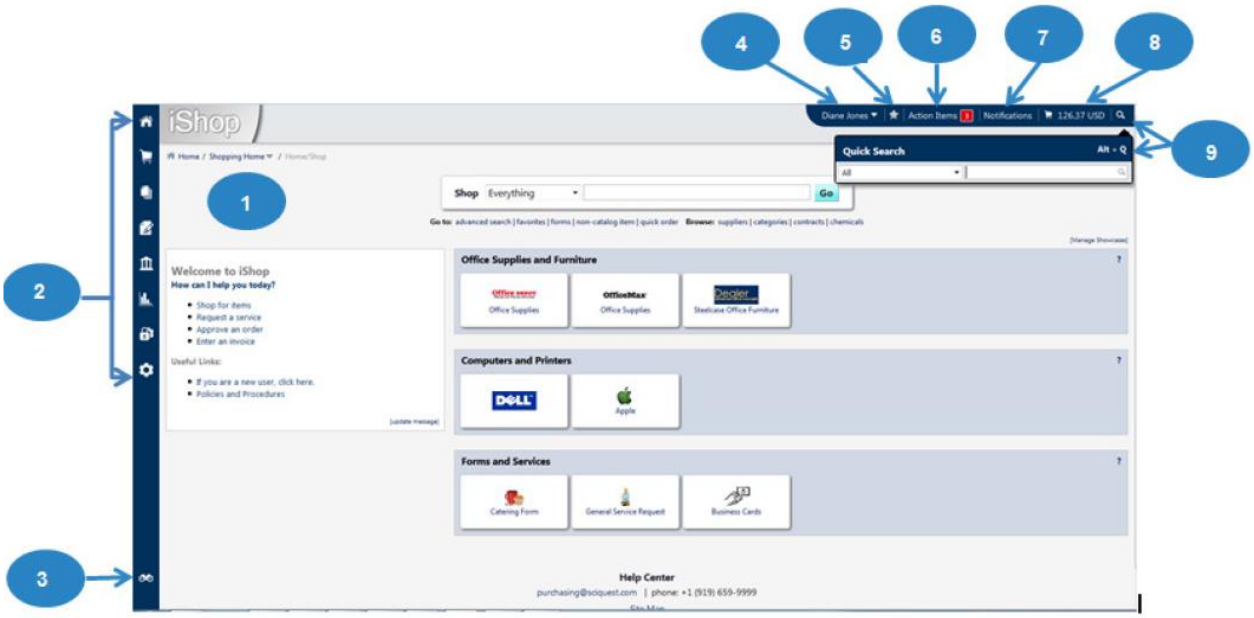
(Add checked Web Roles)

Once your security request is approved follow the login instructions below:

1. Access [Employee Home] with your StarID and password
2. Under 'Administrative Applications' select 'Purchasing'
3. In the left navigation menu, select 'Minnesota State **Marketplace**'

4. Login with StarID and password

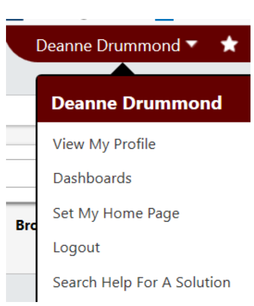
Navigating in the Marketplace (after login)



1. **Shopping Home** – Default landing page
2. **Main Menu Options** - The options displayed are based on user roles assigned from ISRS security. Each menu contains sub-menu options.
3. **Menu Search** – This feature allows you to search for specific screens and functions in the application
4. **User Menu –** Access and update your user profile by selecting your name
5. **Bookmarks –** Create and access bookmarks for commonly used pages
6. **Action Items –** Action items are tasks that require action on your part. Action items are grouped together by task. Click on the task to take you to the appropriate area of the **Marketplace**.
7. **Notifications –** Notifications are designed to alert you when an activity has taken place or something requires your attention.
8. **Cart Preview –** Cart preview allows you to get a quick view of the active shopping cart.
9. **Quick Search –** This allows a variety of searches to be performed from anywhere

Setup defaults and favorites

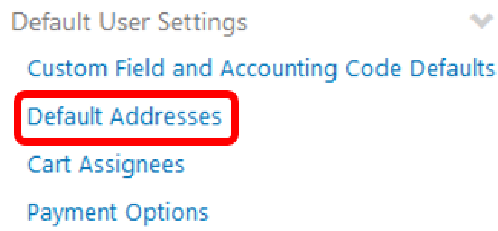
To start, select the dropdown icon next to your name in the top right of the **Marketplace**. Once selected, chose 'View my Profile'.



Default Addresses

When submitting a requisition, you must enter a ship and bill to address every time. By setting these defaults, the system will remember them save you some time! Follow these instructions to setup your default addresses:

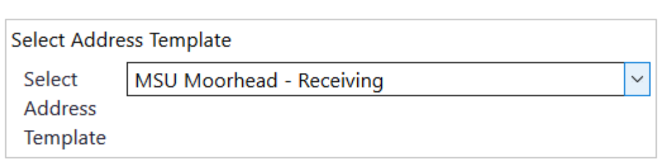
After selecting 'View my Profile' select 'Default User Settings' then 'Default Addresses'.

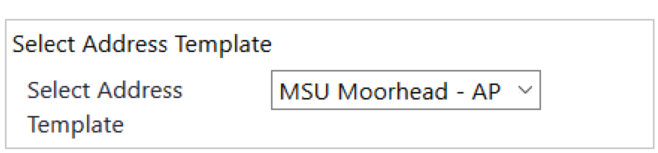


Perform these steps for **both** the 'Ship to' and 'Bill to' address:

1. Chose the button 'Select Addresses for Profile'

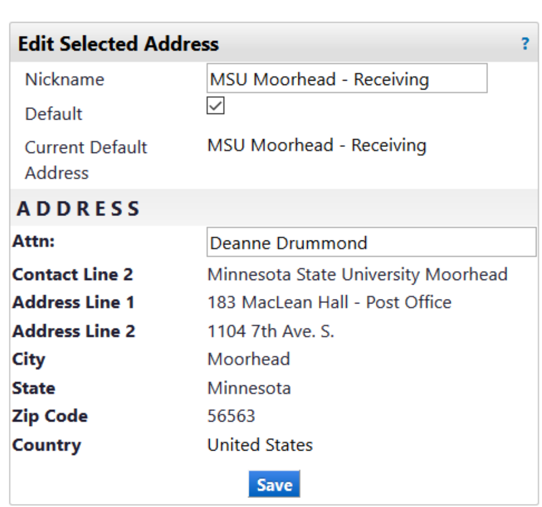
2. Select templates of 'MSU Moorhead - Receiving' for your ship to address **and** 'MSU Moorhead – AP' as your bill to address:



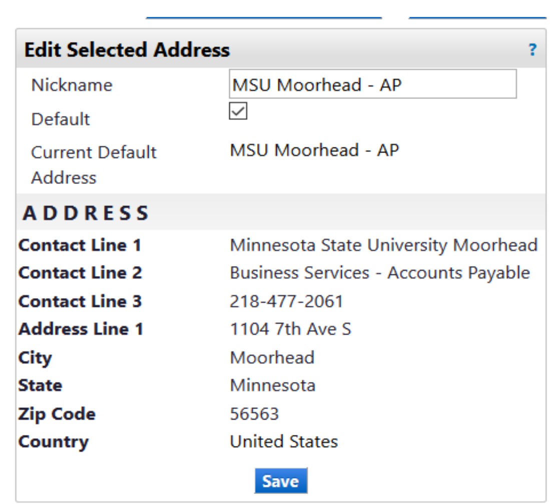


3. Make sure the default box is checked for both and shipping, then click 'Save'. Your name will default in the ship to address so the Post Office knows who to deliver it to.

Ship to:



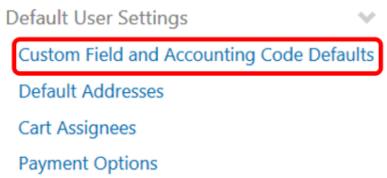
Bill to:



Accounting Defaults and Favorites

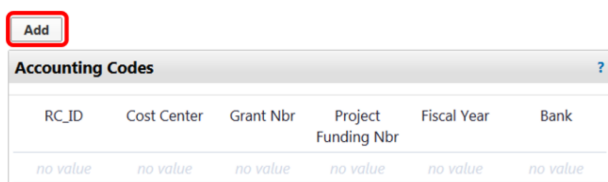
Setting up your cost centers as a favorite default will save you a lot of time when ordering. They appear on the requisition for you to select from a dropdown instead of entering it every time. To setup your cost centers as a favorite default follow these instructions:

1. After selecting 'View my Profile' select 'Default User Settings' then 'Custom Field and Accounting Code Defaults'.

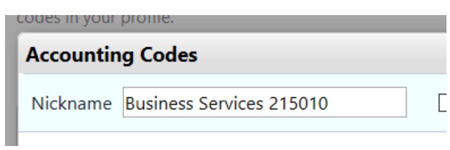


2. Select the 'Code Favorites' tab

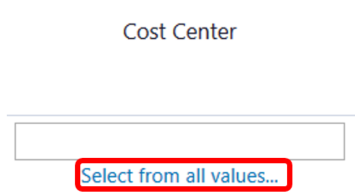
3. Select the first 'Add' button



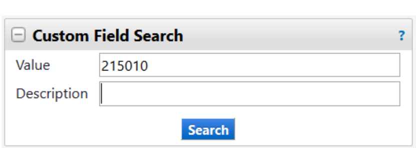
4. Choose a 'Nickname' that will assist you in knowing what cost center to use – we also recommend entering the cost center number as part of the name. For example 'Business Services 215010'.



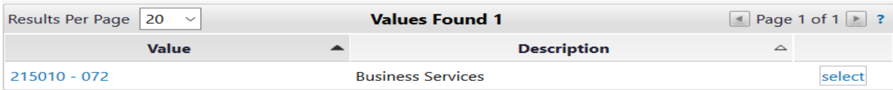
5. Once you enter a Nickname, under the Cost Center, choose 'Select from all values'



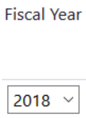
6. Search for your cost center by entering the cost center number in the 'Value' field, then select 'Search'



7. Press 'Select' when your cost center appears (note: all cost center numbers include a 3 digit code tied to your college/university)

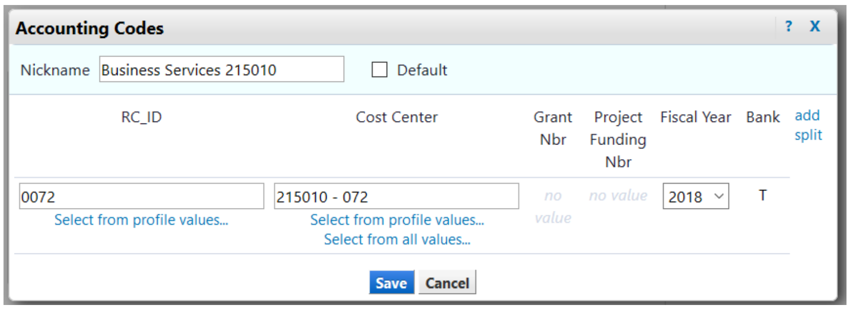


8. After step #7, you will be brought back to the previous page. Select the current Fiscal Year from the drop down box. For example, 2018.

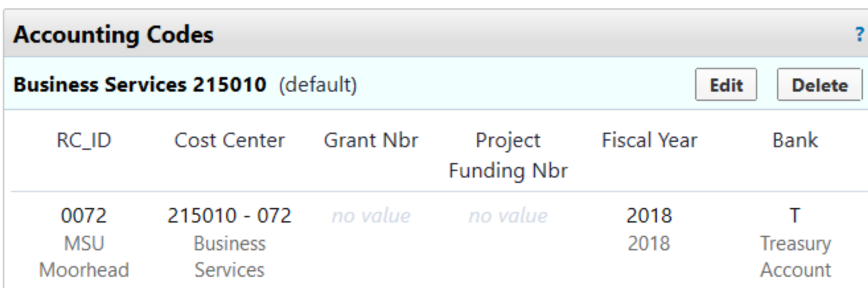


9. The finished product should look like this:

   Before saving -



   After saving –



Additional Notes:

- You can also check the default box to have one stored as your default.
- You can save a split as your default, meaning you can set it up using multiple cost centers.

Shopping – creating a cart

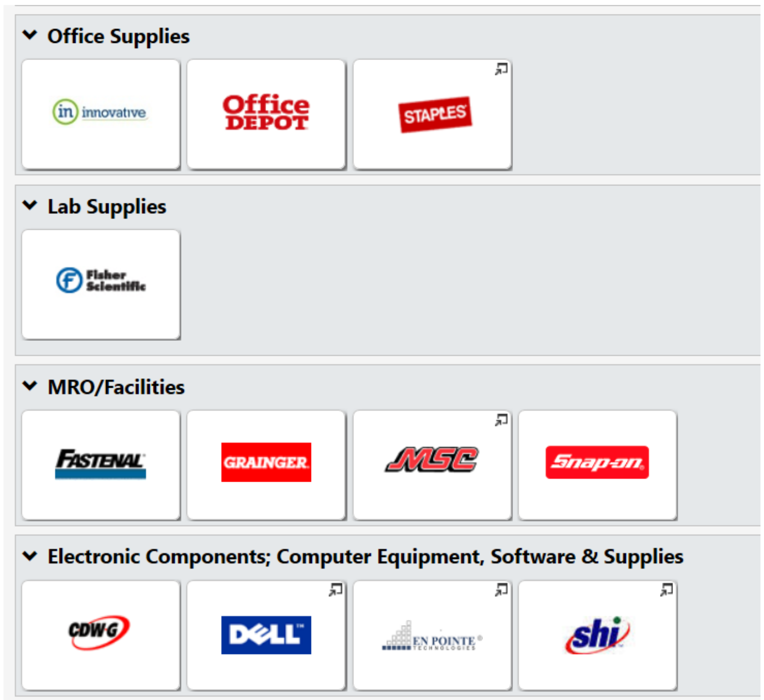
Users have several options for shopping. All methods are designed for items to be added to a cart, and then forwarded to a department approver for review. Once a shopping cart is approved, it will become a requisition and go to the business office for additional review. More than one item can be added to a cart, and in most cases items from multiple shopping methods can be added to the same cart.

Shopping Options:

Hosted Catalog: Imported into the **Marketplace**
Punch-out Catalog: Redirected to vendor site
Non-Catalog order: Order information entered by user, and distributed to vendor
Blanket Order: Frequent orders to same vendor throughout the semester

Shopping using a Punch-out catalog

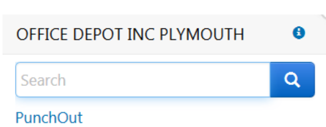
There are several vendors who have created custom websites for colleges/universities to use that reflect our contract prices. You will see them first thing when you login:



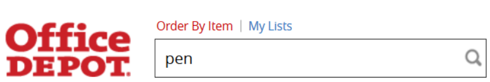
Shopping for items within a Punch-out catalog is much like other online shopping experiences. Here is an example:

1. Select 'Office Depot'

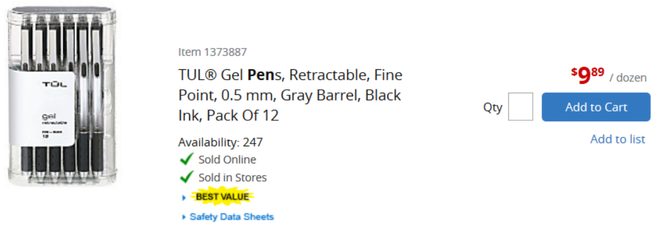
2. Perform a quick search or select the 'Punch-out' link



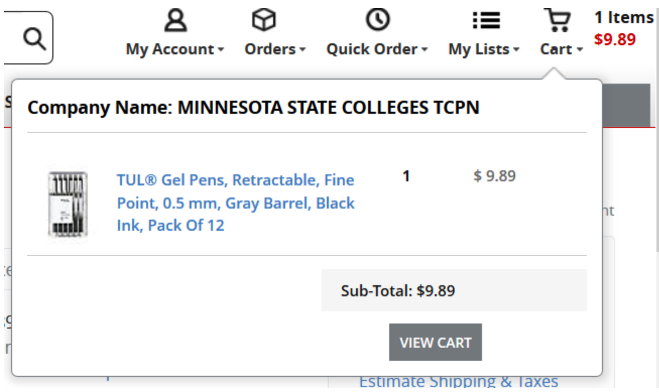
3. Once you are connected to the Office Depot site. Searching for pens is easy:



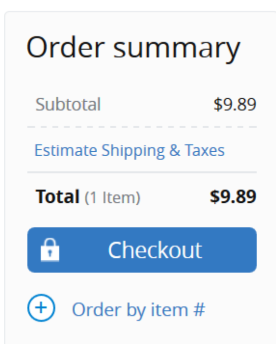
4. A list of items will appear. Find the one you want, enter the appropriate quantity and then select 'ADD TO CART'.



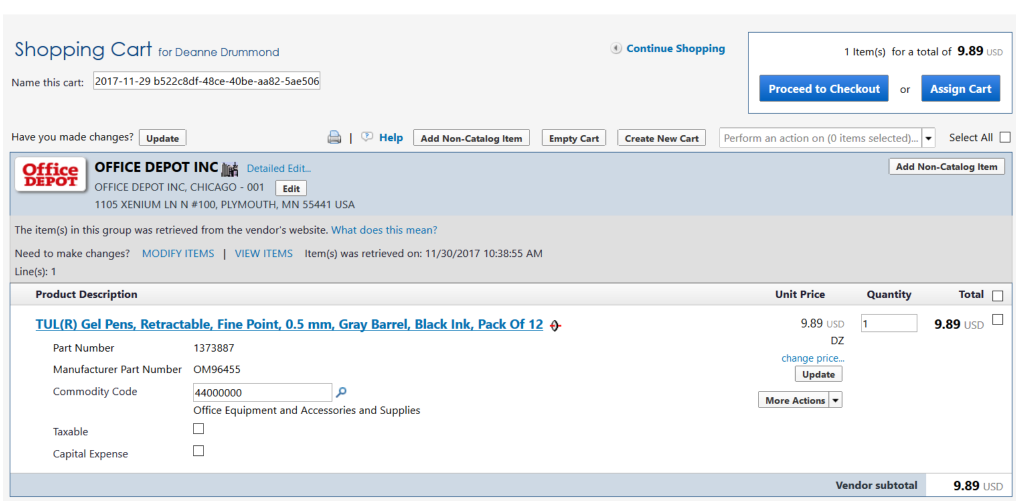
5. View your cart and checkout once you are finished shopping. Note that the checkout view and process may vary slightly among vendors' punchout sites.



6. Checkout

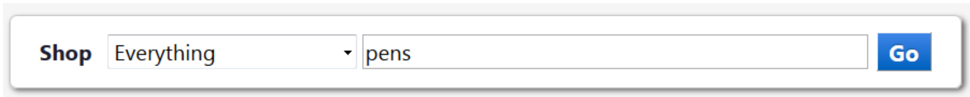


7. You will be brought back to **Marketplace** to finish your order and checkout.

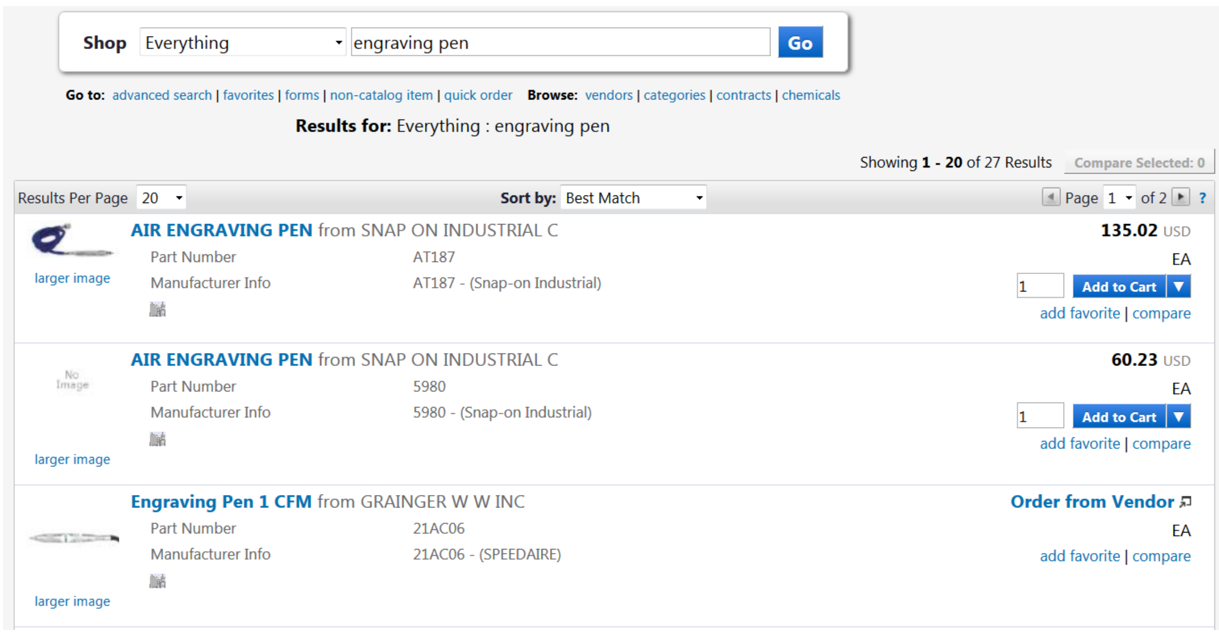


Shopping using a Hosted Catalog

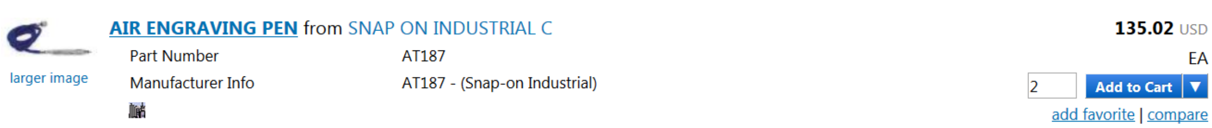
1. From the Shopping home page, search the item you are looking for.



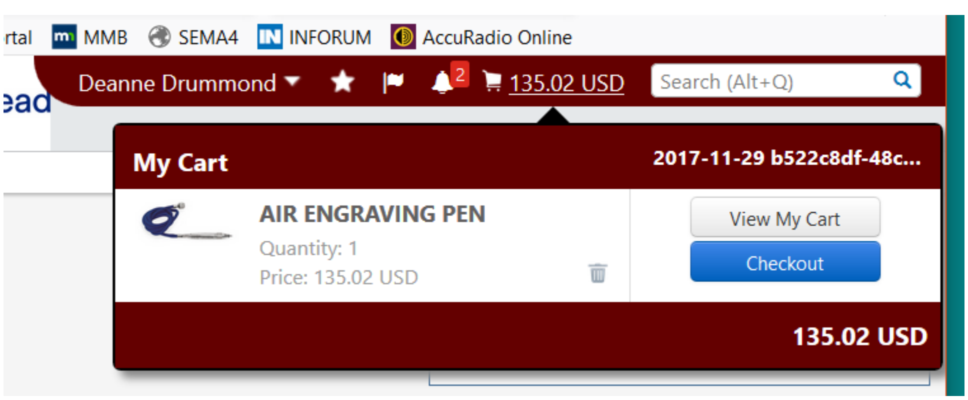
2. A hosted catalog item (note: if you shop from a hosted catalog, you will remain within the Marketplace, rather than being directed to an external site) will show the dollar amount in the search. If the item you search for shows no dollar amount, but an option to 'Order from Vendor' that means the vendor is setup as a Punch-out catalog.



3. Find the item you want, enter the appropriate quantity, and select 'Add to Cart'



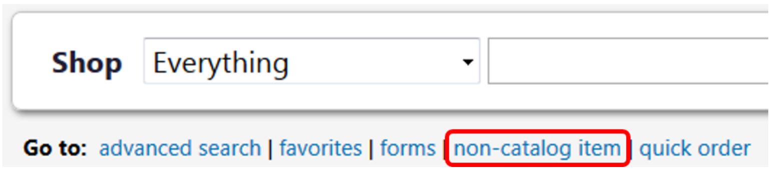
4. Once you finish shopping, you can check out from your cart. You cart total is in the top right. Select the total and checkout.



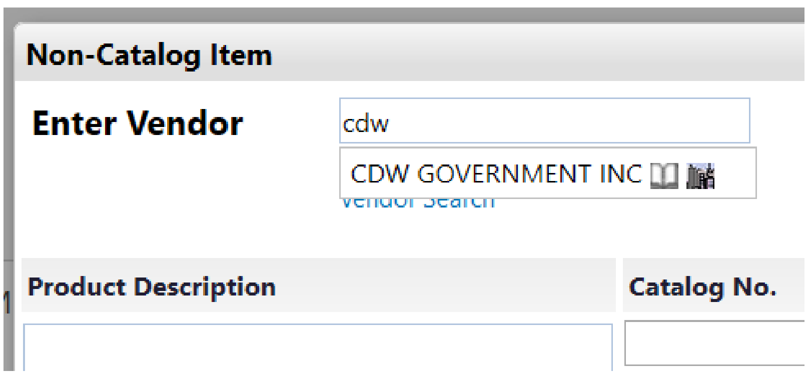
Non-Catalog order

When ordering something that is not available on a catalog, you will place a non-catalog order. For example, you are ordering promotional items or purchasing a membership.

1. Select the 'non-catalog item' option from the Shopping Home page

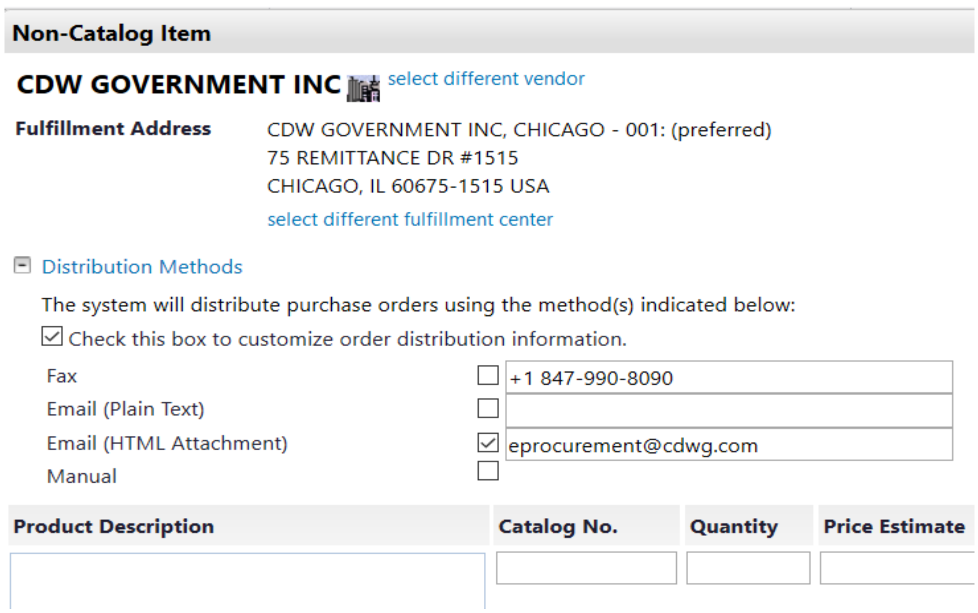


2. Start entering your vendors name or vendor number (you can also select the vendor search button to access a search page)



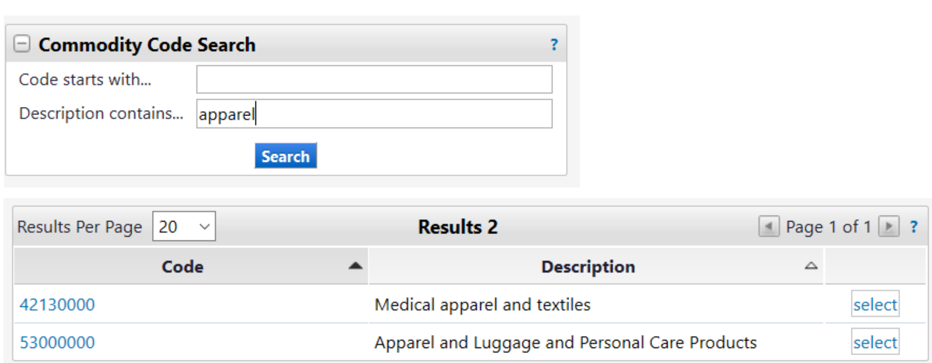
3. Change the fulfillment center if necessary. Choose 'select different fulfillment center'. You will be brought to a list which you can select from.

4. Verify the distribution method is correct. Check the box to customize order distribution information. That opens this screen where you can customize or change the distribution method. We suggest checking the email (HTML attachment) box and entering your email address in order to have a copy sent to you. You can enter multiple email addresses separated by a semi-colon. You can leave the distribution methods to the default or enter other information. Whatever you check will be the method used to send the purchase order to the vendor.

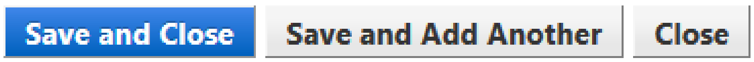


5. Enter the product description

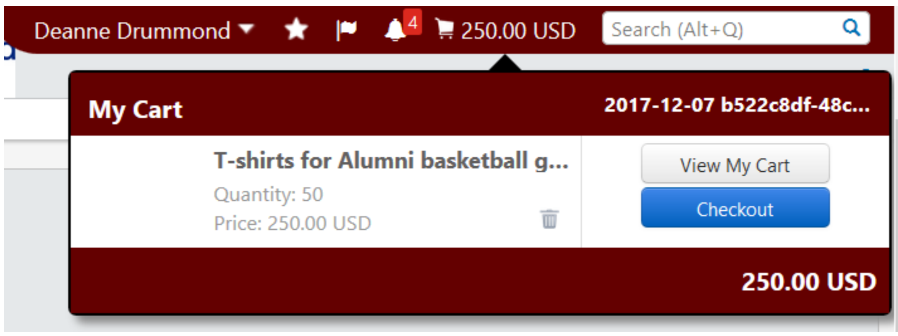
6. Find the Commodity Code by selecting the magnifying glass icon. You will search and select an educated guess as to what the commodity code should be.



7. Select one if the options below to ‘save and close’, ‘save and add another’, or ‘close’. To check out, select ‘save and close’. To add another line item, select ‘save and add another’.



8. Once finished, view your cart and checkout.

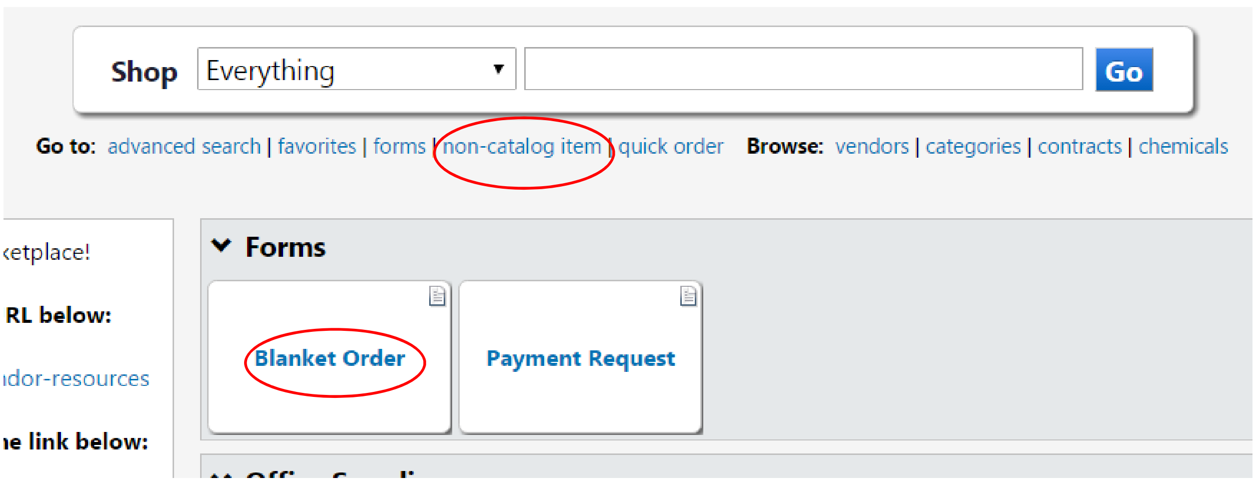


Blanket Orders:

Blanket orders are used when a department frequently places orders with the same vendor throughout the semester. Blanket orders do not list specific items or pricing and so have their own unique system of receiving. An example of a blanket order would be: Welding Supplies for FY17 – 1 Lot - $10,000.00

Most of our products are delivered to the requestor.

The Blanket Order form can be found on the Shopping Home Page.
1.Click the Blanket Order box.



2. Like the Non-Catalog orders, enter the **Vendor Name or Vendor Number** and the system will find the vendor account and load the Fulfillment and Remit Addresses. If the correct vendor does not load, use the blue **Search** link to look for the correct vendor. Contact Purchasing if you have difficulty finding the correct vendor number.

Note: Make sure the address is correct. If you know the store or warehouse that will fulfill the order is located on University Avenue in Saint Paul and a different location loads, click on "select different fulfillment vendor" and look for the correct vendor.

3. Enter a **Product Description** (Example: Auto Parts and Supplies for Fall Semester FY17)

4. Enter a **Commodity Code**. Clicking on the blue magnifying glass will enable you to search for the generic commodity set for the item. The commodity codes are mapped to the object codes.

5. Enter the **Blanket Order Amount**

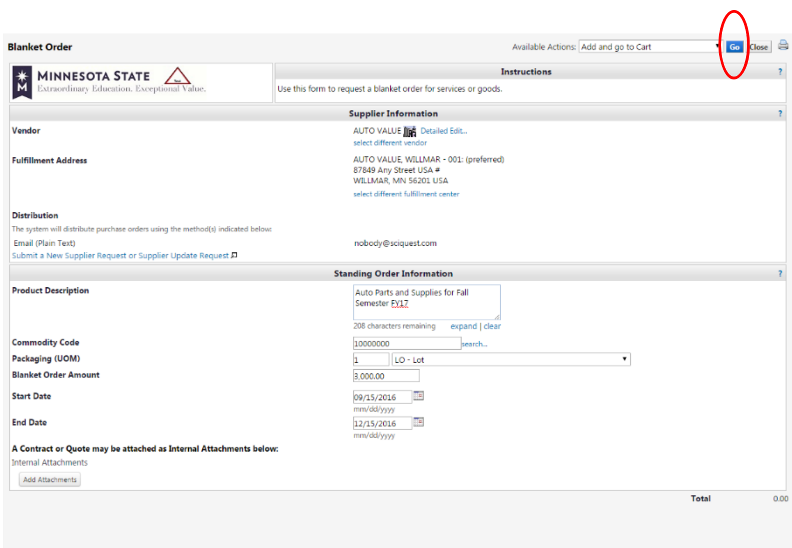
6. Enter the **Start Date**

7. Enter the **End Date**

8. Attached a quote or any other documentation that you are providing as support in **"A Contract or Quote may be attached as Internal Attachments below:"**

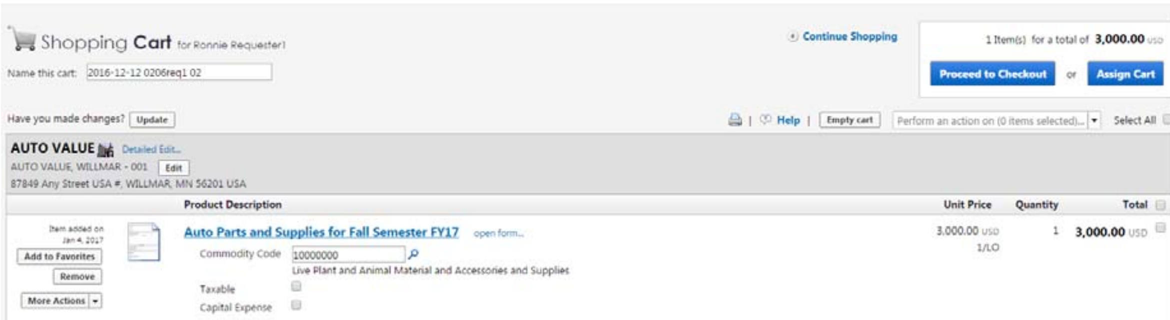
9. When you are ready to submit the request, click the blue **Go**.

If you navigate away from this before you "Add and go to Cart", your work will be lost.



Your request has now been place in a cart. The order is fully editable in your cart. See instructions above for Payment Requests for editing instructions.

Proceed to Checkout to create a requisition when you are done reviewing and editing.



The blanket order requisition is fully editable by both the Requestor and the Approver. See the instructions for editing Non-Catalog orders. To edit the line items of an order created by a Requestor, the Approver will need to select **Assign to Myself** from **Document Actions.**

Note: Like the catalog and non-catalog orders, changes should be made before submitting the requisition. If you need to make a change after the requisition has been approved by the Cost Center Manager, contact Purchasing. You will be able to see the orders status in your dashboard and determine where in the workflow the order is. Purchasing can make some changes to your order for you; but if you are not the Cost Center Manager and you are increasing the dollar value, she may need to return the requisition to you so it goes through the approval process. If the requisition has been flipped into a purchase order, Purchasing can make changes to the purchase order but will require an email from the Cost Center Manager to authorize the change.

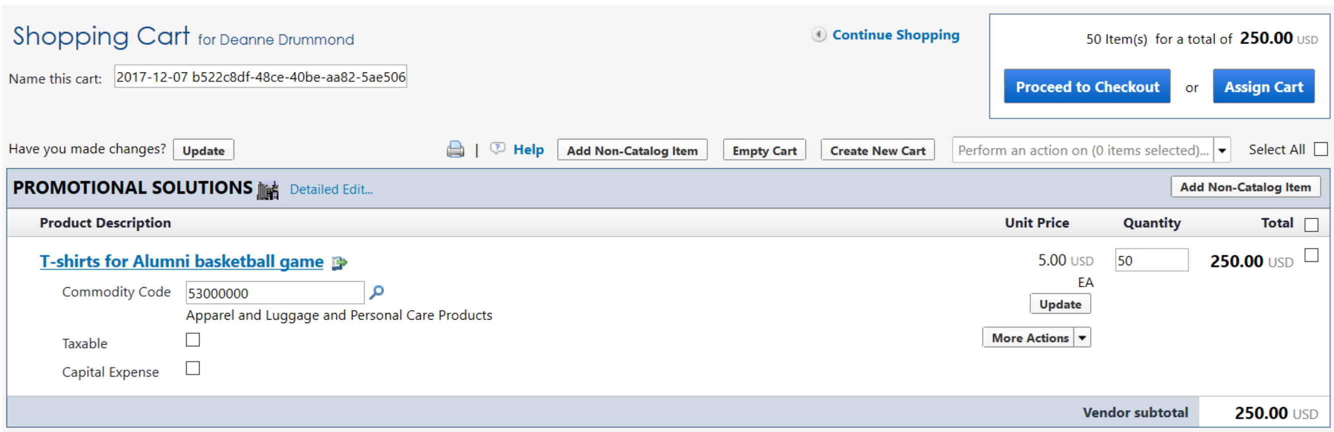
After your Final Review and all changes (if needed) have been made, **Submit Requisition.** The requisition will flow to the Department Approver (Budget Authority). If you are the Department Approver, the requisition will flow to the Purchasing Department.

Shopping notes:

- You can add multiple items, from multiple vendors, to one shopping cart. The system will split the PO to the correct vendors automatically for you!

Completing a Requisition

If ready to proceed, as a shopper you can 'assign cart' (set up default in user profile under cart assignees, or by searching for cart assignees). If you have the role of a requestor, you can 'proceed to checkout'. The system will assign a requisition number.

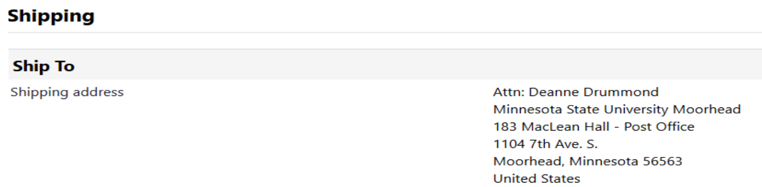


At the requisition screen, the list on the left with the green and gray checks shows the workflow. It is recommend that you go through all the areas. The key areas are the billing, shipping, accounting codes, internal and external notes and comments. The fields with gray check marks show what needs to be completed. Both billing address and accounting codes can be pulled from your defaults (recall that these can be set up in your profile) or they can be manually entered.

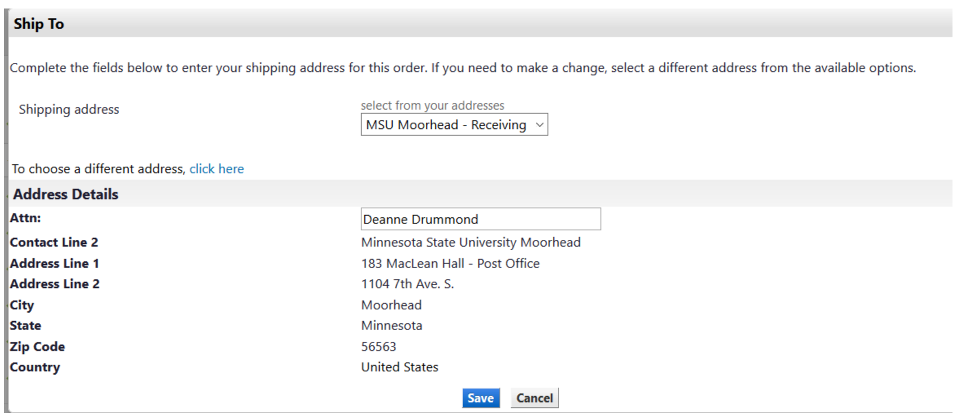
Billing/Shipping

If you did not setup a default, or this is your first order, you will need to enter the billing and shipping addresses.

1. Select the ‘edit’ button on the Shipping page



2. Select the appropriate dropdown option, then save.

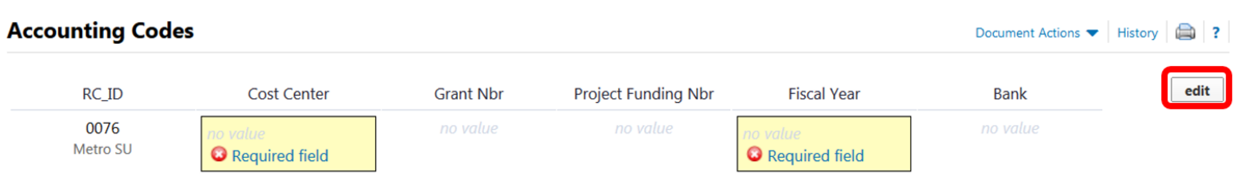


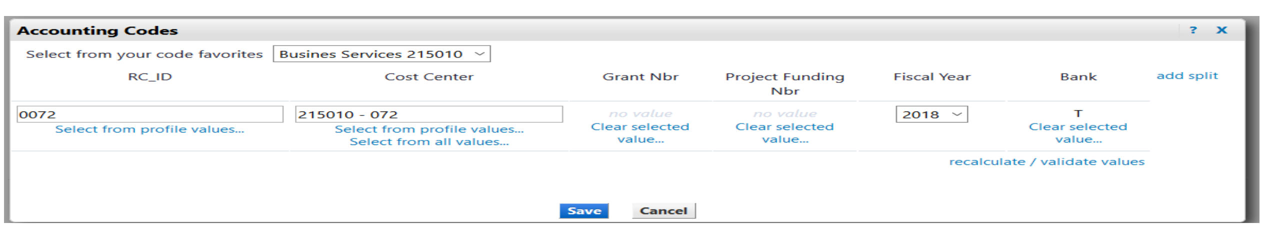
NOTE: If you are ordering on behalf of someone else, enter their name in the ‘Attn’ field.

Accounting Codes

This area is where you will enter your cost center information. Cost center will appear one of two ways or you will need to search.

If you setup a default cost center, it will appear. If you created a list of favorites, they will show by selecting the ‘Edit’ box to see a dropdown list.

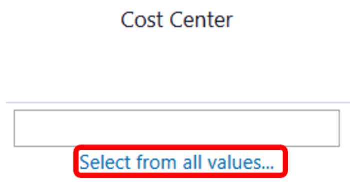




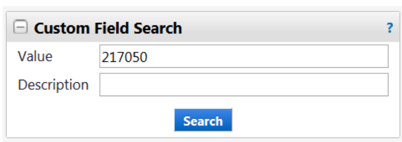
If you need to enter a cost center, follow these instructions:

1. Select the ‘Edit’ box.

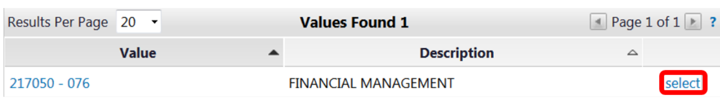
2. Under the Cost Center, choose ‘Select from all values…’



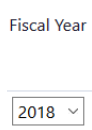
3. Search for your cost center by entering the cost center number in the ‘Value’ field, then select ‘Search’



4. Press ‘Select’ when your cost center appears

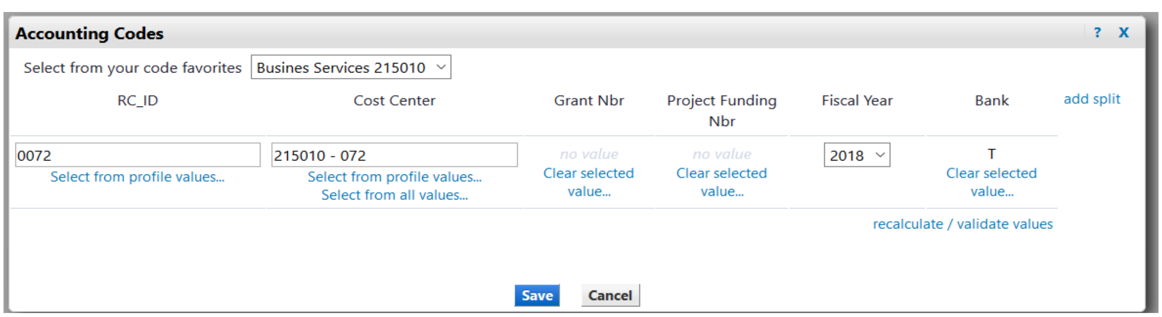


5. After step #4, you will be brought back to the previous page. Select the current Fiscal Year from the drop down box. For example, 2018

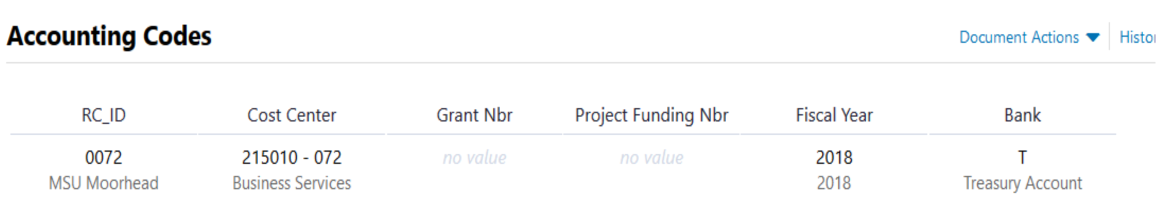


6. The finished outcome should look like:

Before saving –



After saving -

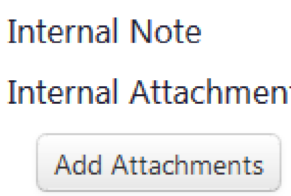


Internal/External Notes and Attachments

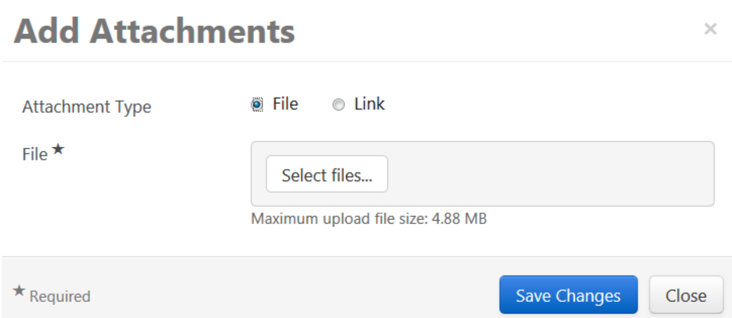
Internal Notes and Attachments and External Notes and Attachments can be added. More commonly used for non-catalog purchases, documents such as special expense forms (internal), quotes (external), special instructions (external) and single source (internal) can added to accompany the requisition through workflow (Cost Center Approval, ISRS Validation and Purchasing).

To add an attachment, follow these instructions:

1. Select the 'Internal notes and attachments' or the 'External notes and attachments' area.
2. Select 'Add Attachment'

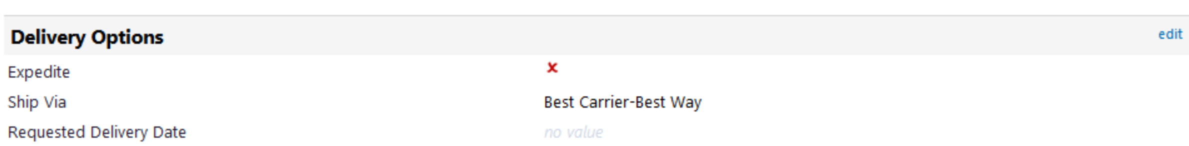


3. Chose the option 'Select files…' and find the scanned or saved item from your computer. Once completed, select 'Save Changes'.



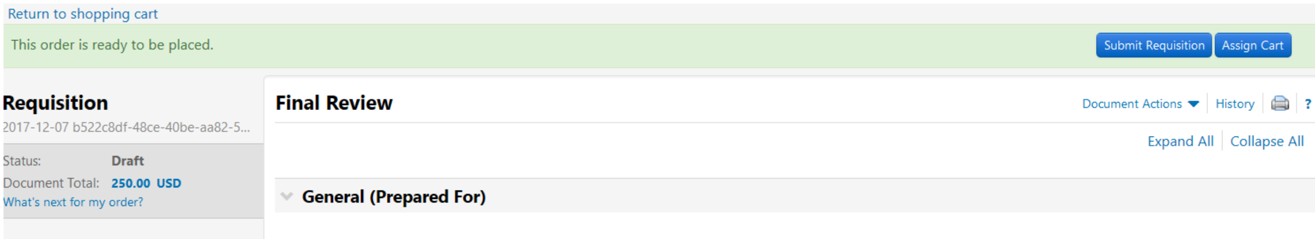
Final Review/edit

'Final Review' will provide an opportunity to edit the requisition. Under delivery options (edit) a requested delivery date can also be added.

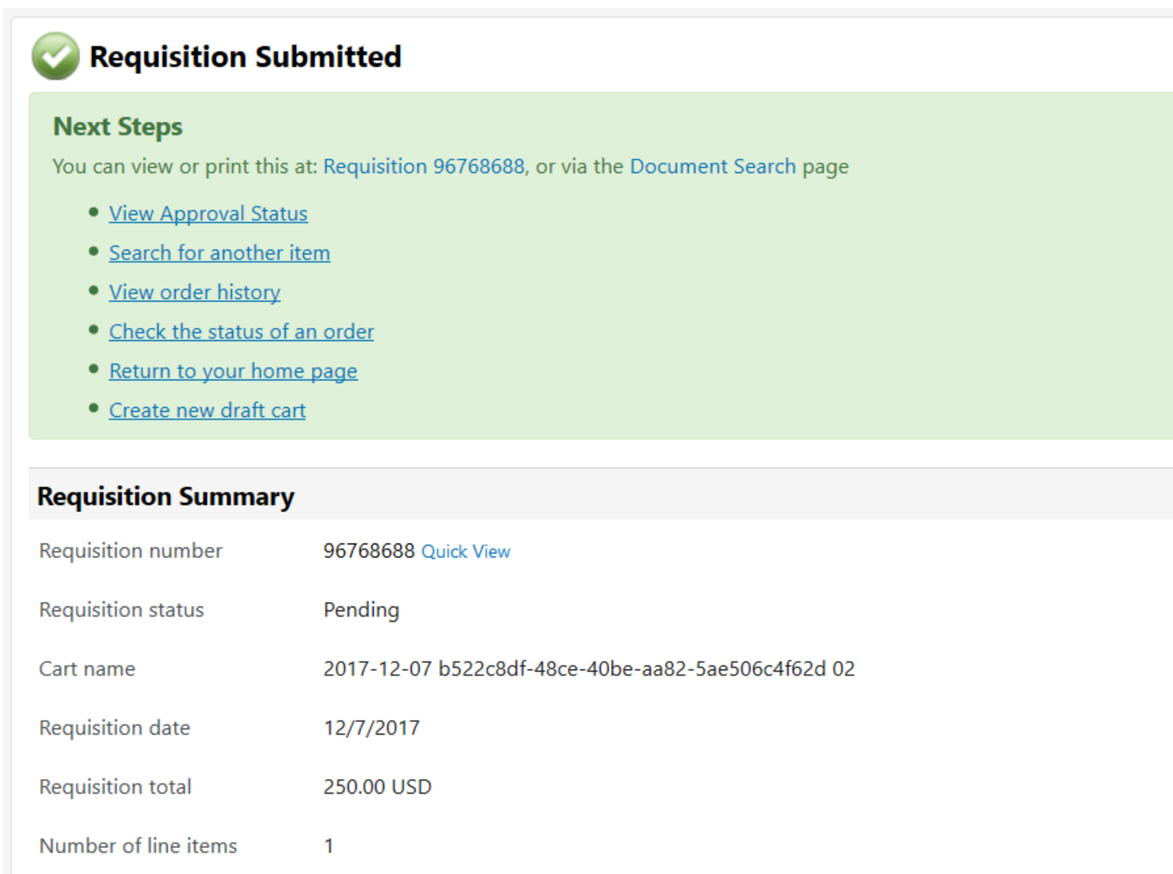


Submitting and Tracking a Requisition

Once the requisition is complete, click ‘Submit Requisition’ on the top right.

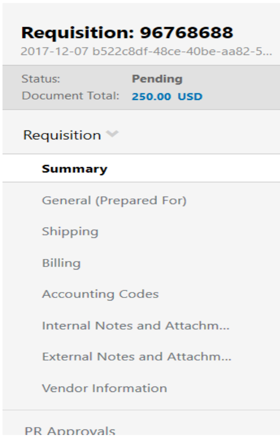


Submitted requisition will provide the requisition number, and the ability to quick view by clicking on the requisition number. You can click ‘View Approval Status’ which will show workflow for this specific requisition.

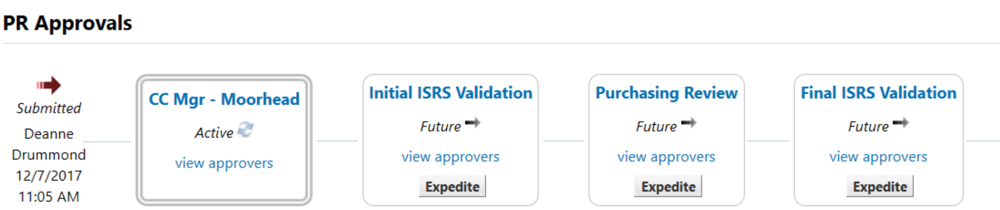


Tracking a requisition

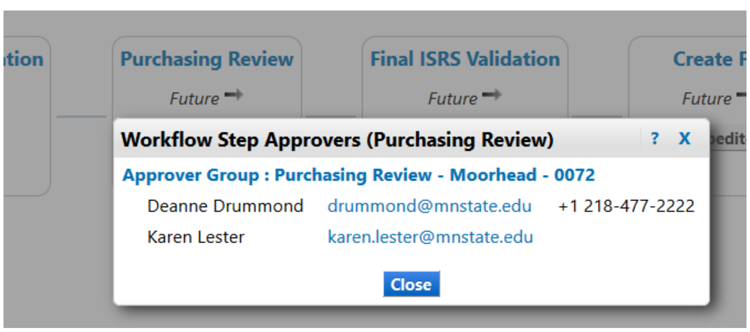
To track requisition status, find your requisition and in the left navigation, select 'PR Approvals'.



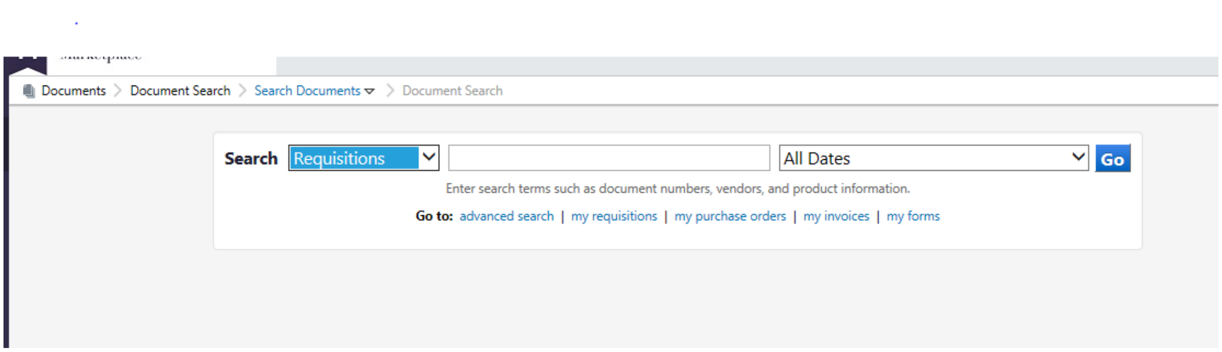
This will provide a visual of where your order is in the process.



If an area says 'Active', you can select the 'view approvers' option to see what step it is at.



You can also search for documents (including requisitions) using the general search function:



Errors/Returned Requests

If a request has errors or was returned, you will receive an email with the error message. In addition, you can access the requisition and select the 'History' button in the top right to see notes that also include the error message.

The most common error will be related to budget. That error message will say "Encumbrance amount has exceeded the remaining budget balance for fiscal year 2018, cost center 215010 and object code 3000."

All errors are sent to the person who placed the request, NOT the approver.

Once budget has been added or you have changed cost centers, you can proceed with the requisition.

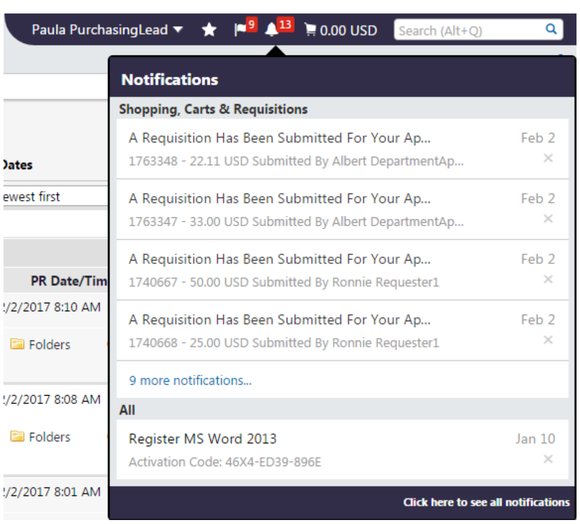
Approving a Requisition (Department Approver role)

Employees who have the appropriate role and Delegation of Authority can approve a requisition. Approvers will receive a notification that they have an approval pending.

Notifications

- **The Bell**

When requisitions enter your work queue, a notification will list in the Notifications bell. These are just quick summaries of the requisition and can be used to quick access the requisition. These are temporary and will not clear off the list after you act on the requisition.

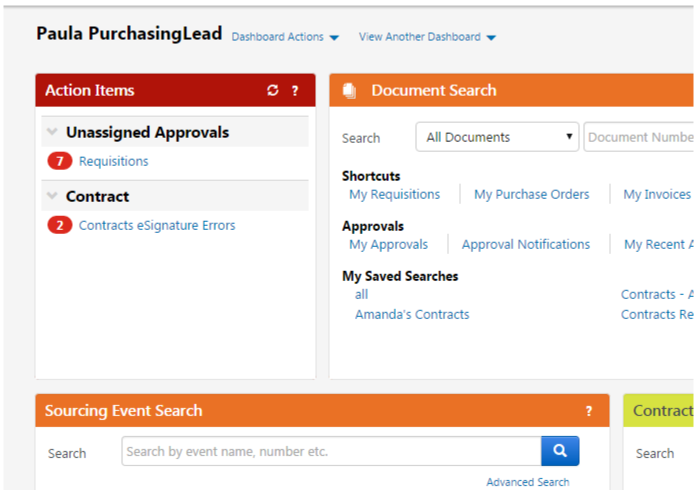


- ## Email Notifications

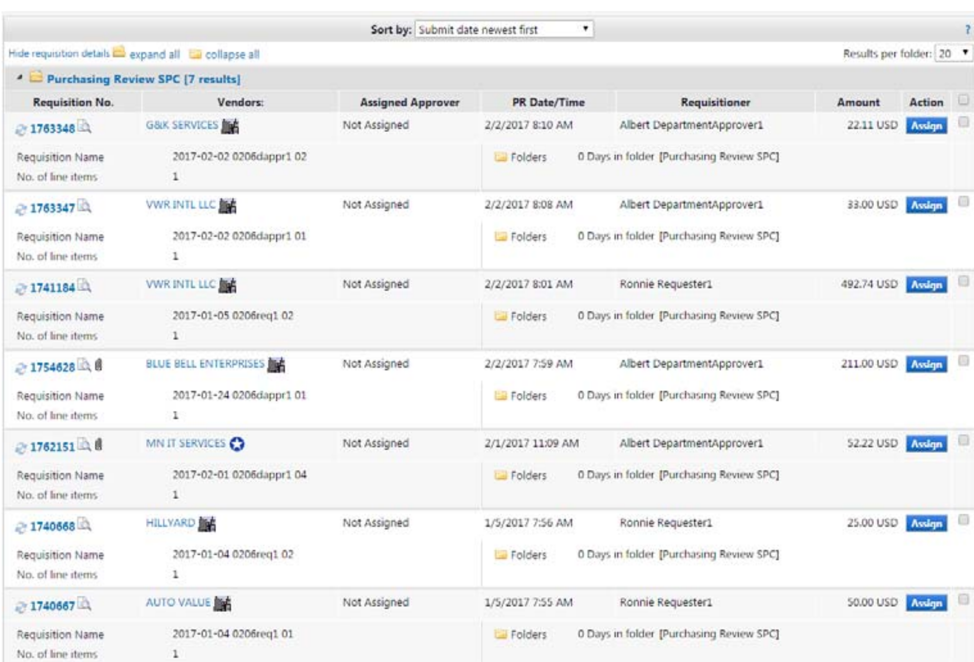
You can have email notifications sent as well. However, depending on how many requisitions are processed; you could receive a large volume of email notifications. The dashboard is probably the best source for finding your pending work.

- ## Dashboards (Your In-box)

One method to find the requisitions the department approver needs to process is to set up a Dashboard. Below is a portion of a created dashboard. The widget **Action Items** will display pending work. This is probably your most reliable source to find items that need your attention.

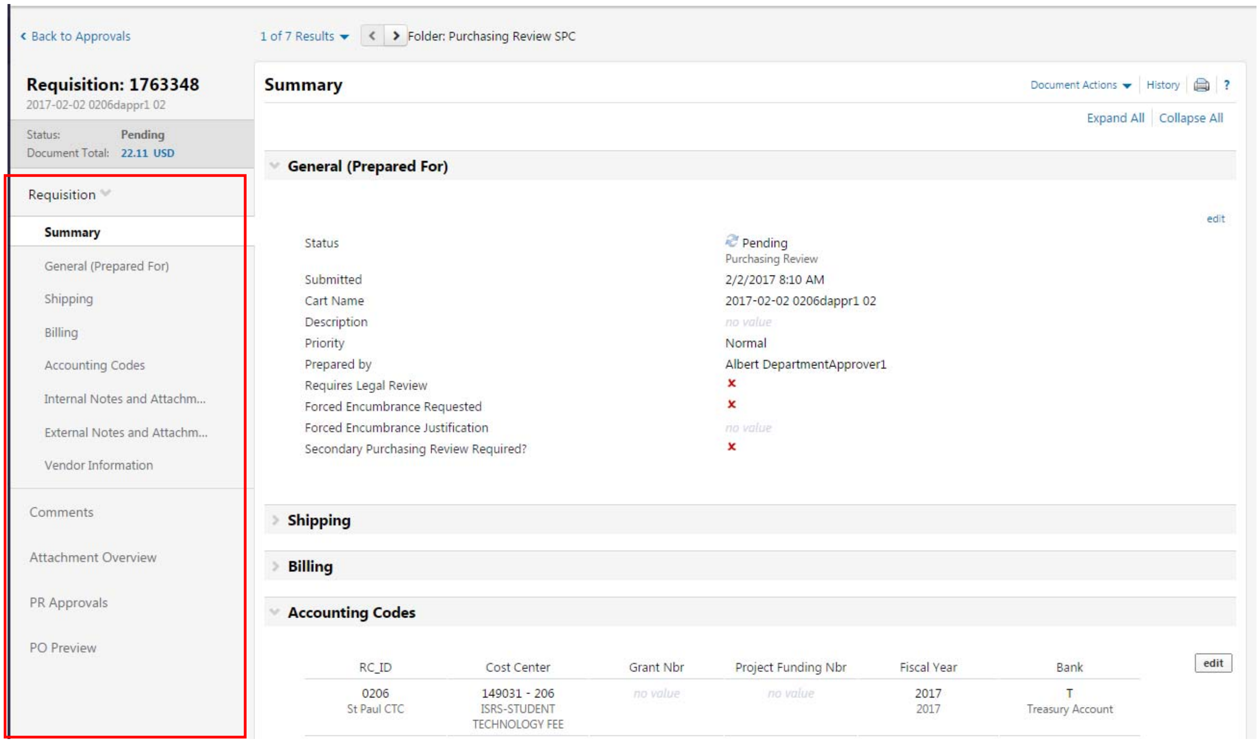


Clicking on the blue **Requisitions** link will display a list of all the requisitions that require your attention.

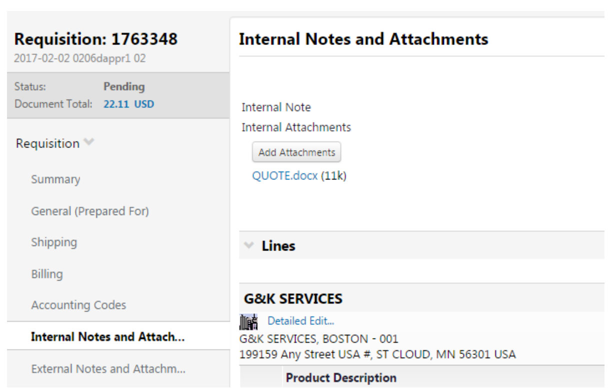


REVIEWING THE REQUISITION

After clicking on the blue **Requisition No.** on the list displayed above, the following screen displays.



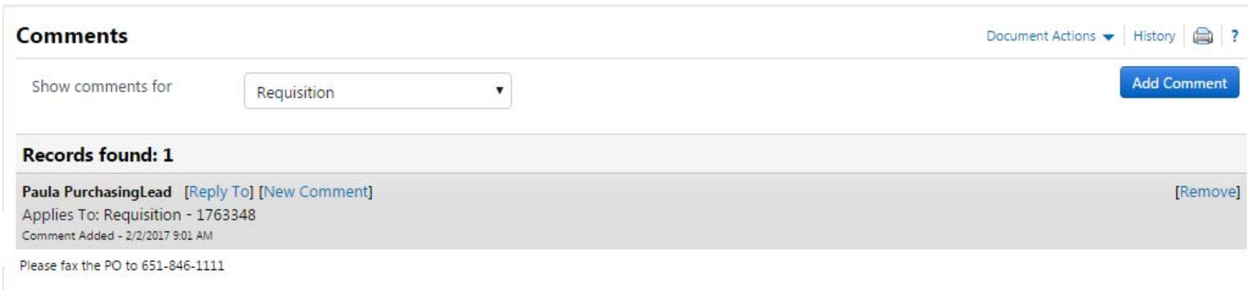
Clicking on the menu items on the left will allow the approver to quickly go to the items they need to review.



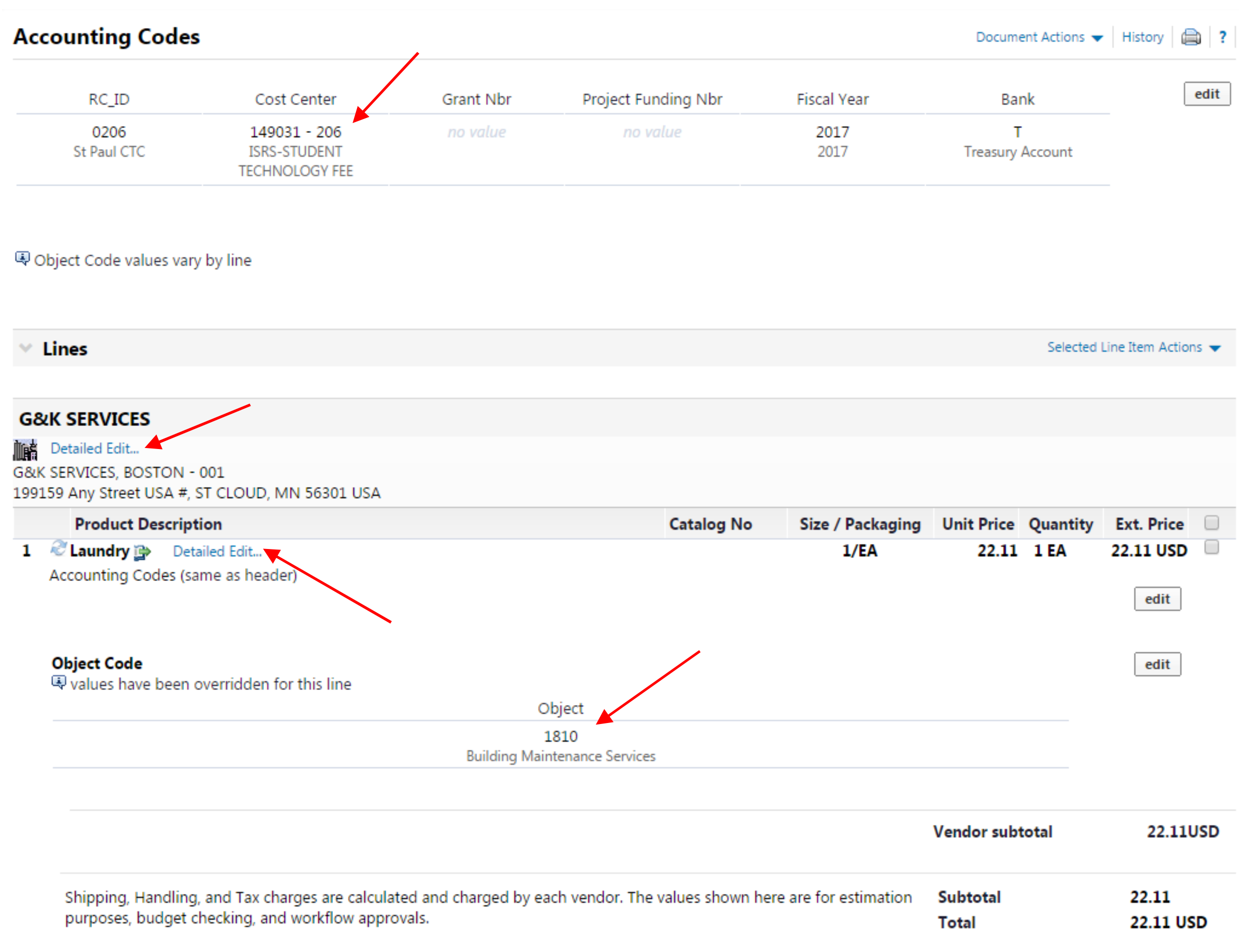
If the Requestor attached a document, clicking on **Internal Notes and Attachments** will bring you to a screen where you can click on the attachment and view attached quotes and other documents; as well as any notes the Requestor entered. You can also attach a document for them. **Attachment Overview** is another way to view attachments.

Note: Internal Notes only displays in the Internal Notes and Attachments. Notes added in **Comments** provide a better visual clue on the menu bar. If a comment is added, the number of the comments added will display after the **Comments** menu item.

The Requestor may have added comments to communicate special instructions. Clicking on **Comments** will display any comments added by either the Requestor or Purchasing.



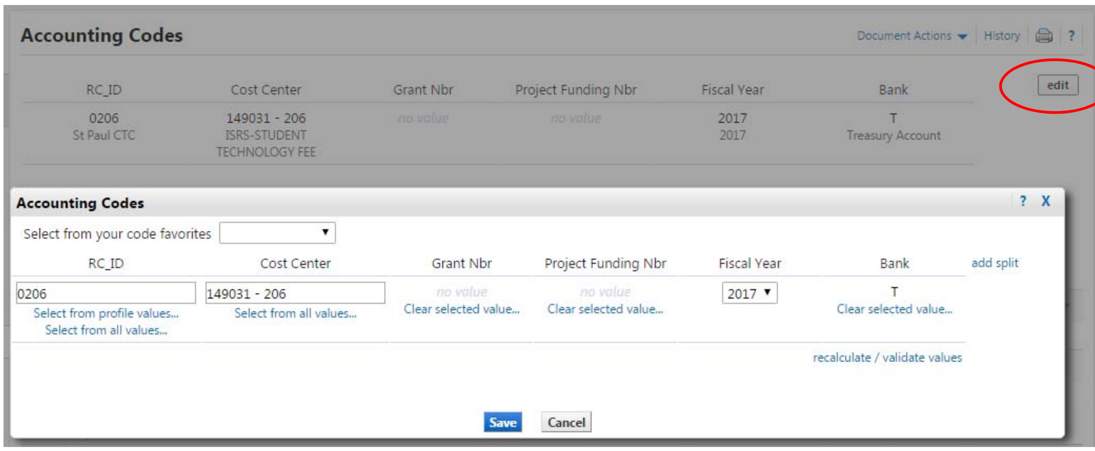
However, clicking on the **Accounting Codes** on the left menu will display much of the information the Department Approver to review. Review 1) Cost Center and Fiscal Year 2) Object Code 3) Commodity Code 4) Fulfillment Center 5) Pricing – If you receive written request to change that you would attach to requisition



EDITING THE REQUISITION

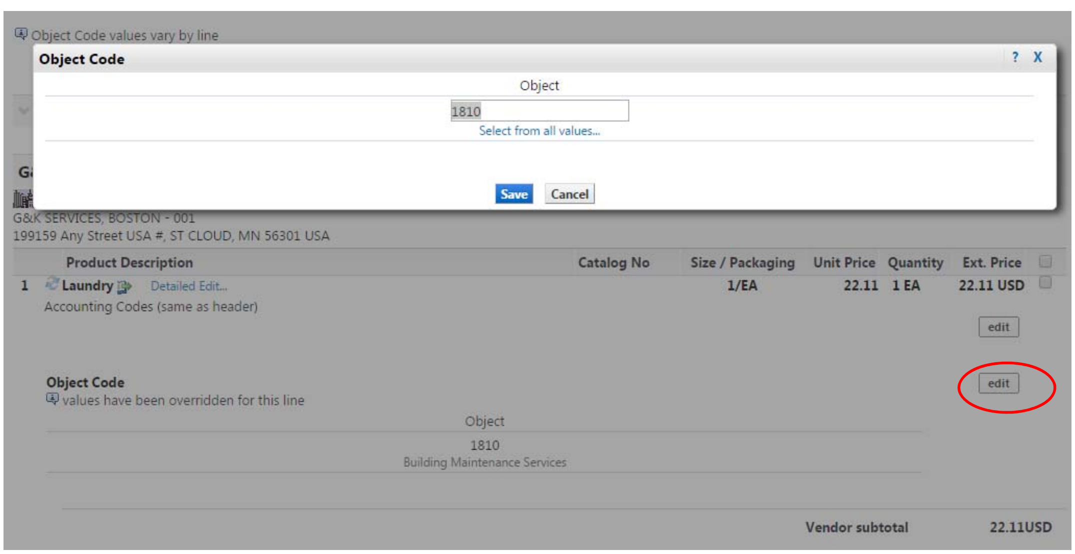
- ### Cost Center (and Fiscal Year)

Clicking the **edit** button will allow you to make changes to any of the items in **Accounting Codes.** Note! The cost center must have the RC_ID included. Using the **Select from all values…** to populate the field is the easiest way to ensure the cost center has been correctly entered.



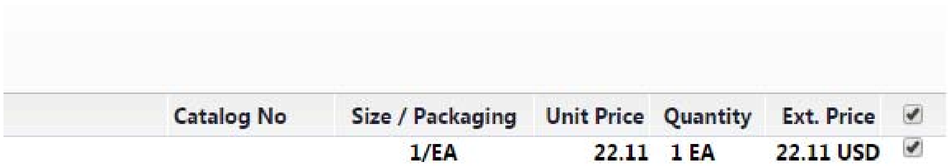
- ### Object Code

Clicking the **edit** button will open up the Object Code field to edit.

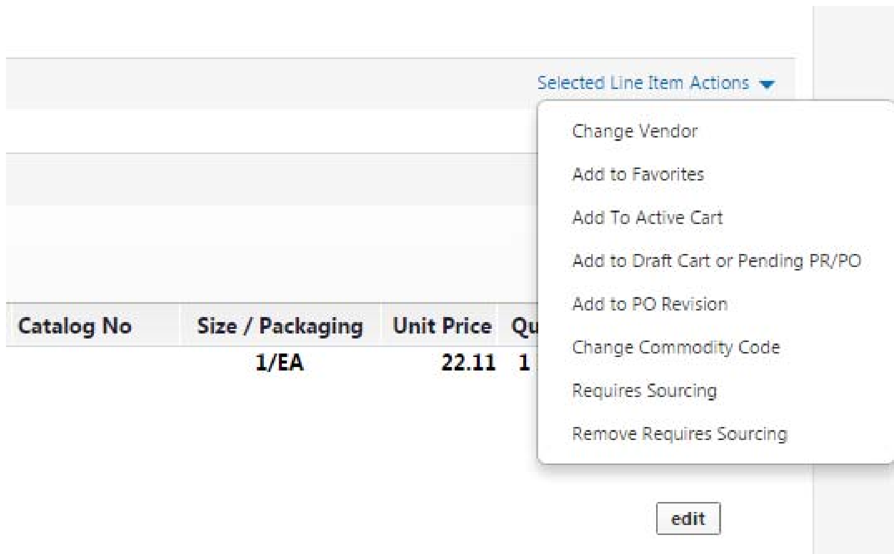


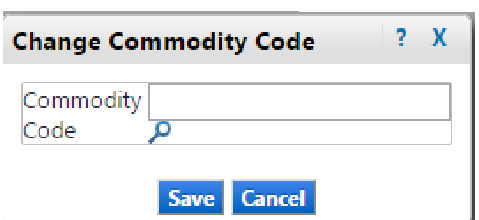
- **Commodity Code**

To change the commodity code, you must first **check** the line item check box.

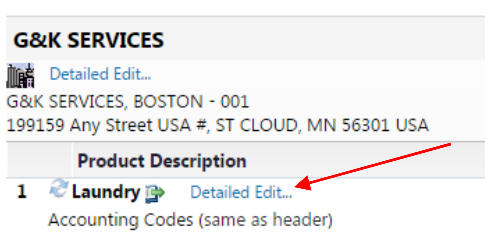


Then click on the blue **Selected Line Item Actions** and select **Change Commodity Code** from the drop down menu.



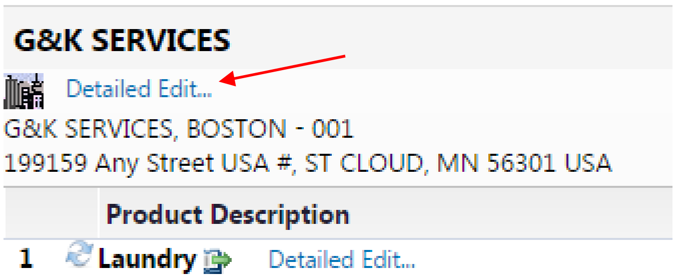


Note: The commodity code will display if you click the blue **Detailed Edit . . .** link after the product description.

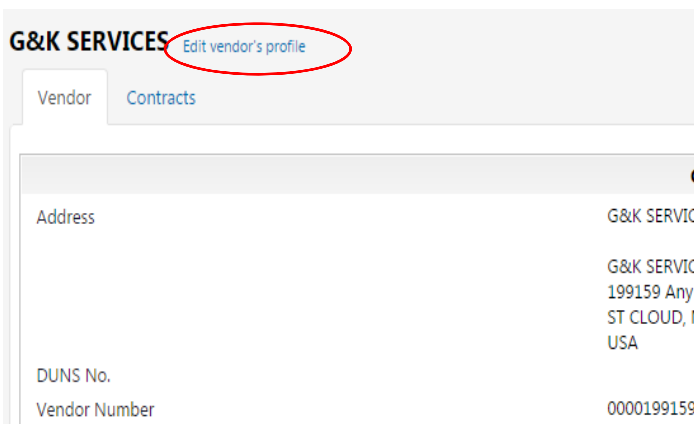


- **Fulfillment/Remit Addresses and Distribution**

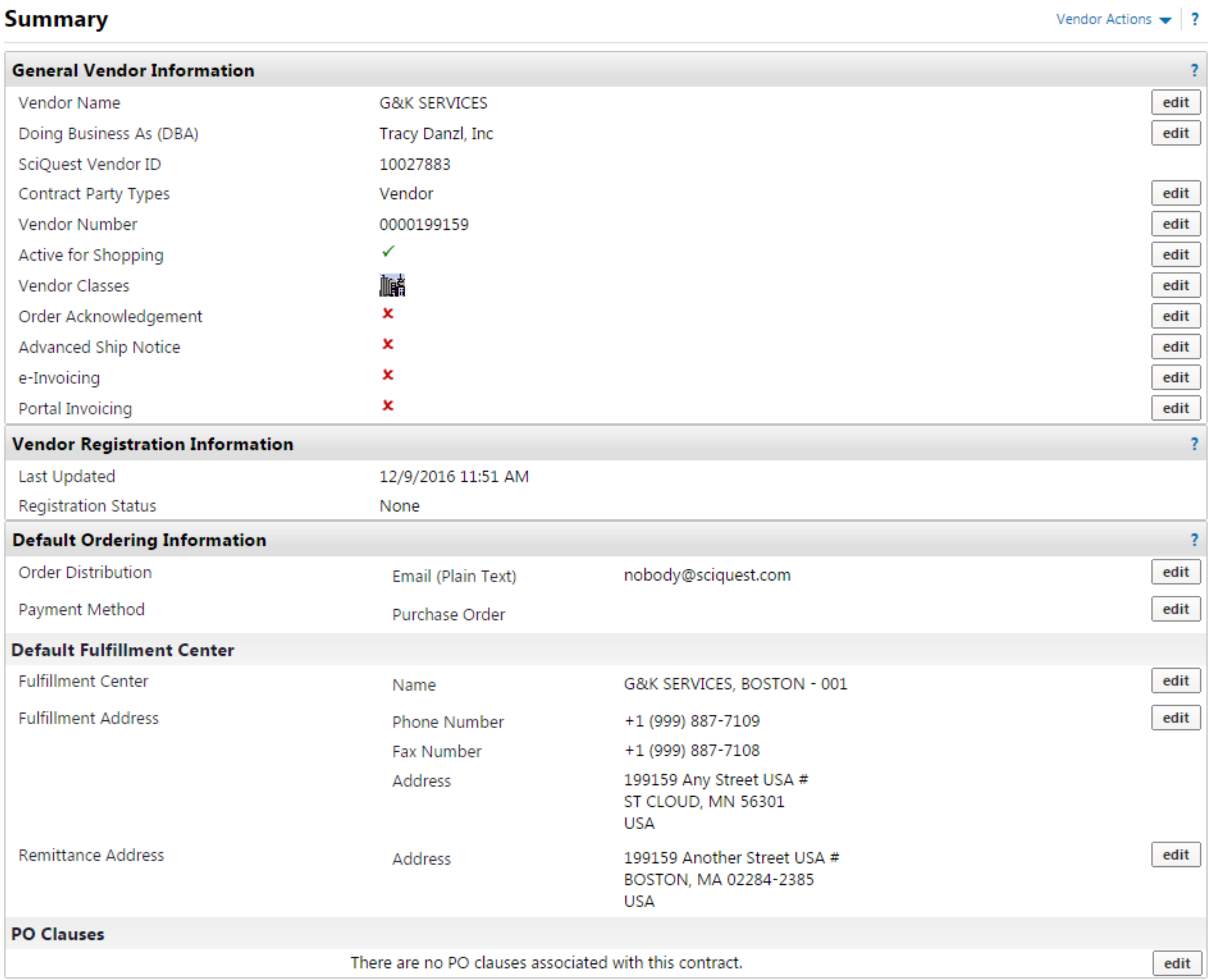
Clicking the blue **Detail Edit . . .** link under the vendor's name will allow you to go to the vendor's information and change addresses and the distribution method (This is where you would input the Requestor's instructions to fax the purchase order to the fax # they provided)



On the next screen that displays, click the blue **Edit Vendor's profile** link



Click the **edit** button after the item you wish to change. **Note:** This change will only impact the order you are processing.



Summary Vendor Actions ?

General Vendor Information ?

Vendor Name	G&K SERVICES		edit
Doing Business As (DBA)	Tracy Danzl, Inc		edit
SciQuest Vendor ID	10027883		
Contract Party Types	Vendor		edit
Vendor Number	0000199159		edit
Active for Shopping	✓		edit
Vendor Classes			edit
Order Acknowledgement	✗		edit
Advanced Ship Notice	✗		edit
e-Invoicing	✗		edit
Portal Invoicing	✗		edit

Vendor Registration Information ?

Last Updated	12/9/2016 11:51 AM
Registration Status	None

Default Ordering Information ?

Order Distribution	Email (Plain Text)	nobody@sciquest.com	edit
Payment Method	Purchase Order		edit

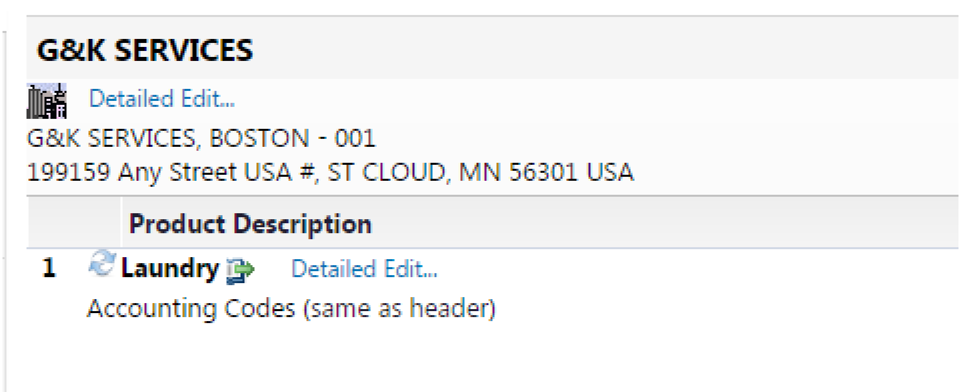
Default Fulfillment Center

Fulfillment Center	Name	G&K SERVICES, BOSTON - 001	edit
Fulfillment Address	Phone Number	+1 (999) 887-7109	edit
	Fax Number	+1 (999) 887-7108	
	Address	199159 Any Street USA # ST CLOUD, MN 56301 USA	
Remittance Address	Address	199159 Another Street USA # BOSTON, MA 02284-2385 USA	edit

PO Clauses

There are no PO clauses associated with this contract. edit

Clicking the blue **Detailed Edit . . .** link will allow you to change a non-catalog line item. Of course, you should have written authorization from the Cost Center Manager that is attached to the requisition.



G&K SERVICES

Detailed Edit...

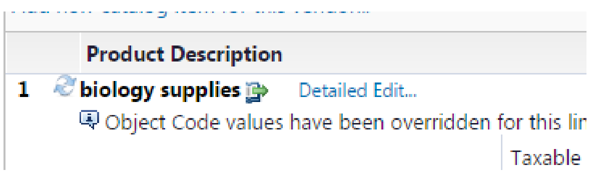
G&K SERVICES, BOSTON - 001

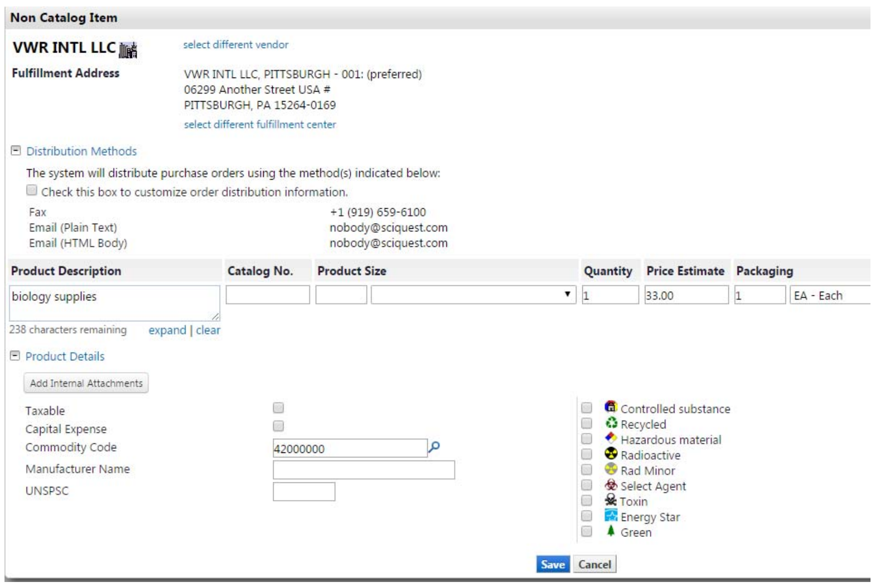
199159 Any Street USA #, ST CLOUD, MN 56301 USA

	Product Description
1	**Laundry** Detailed Edit... Accounting Codes (same as header)

- ### Existing Line Item

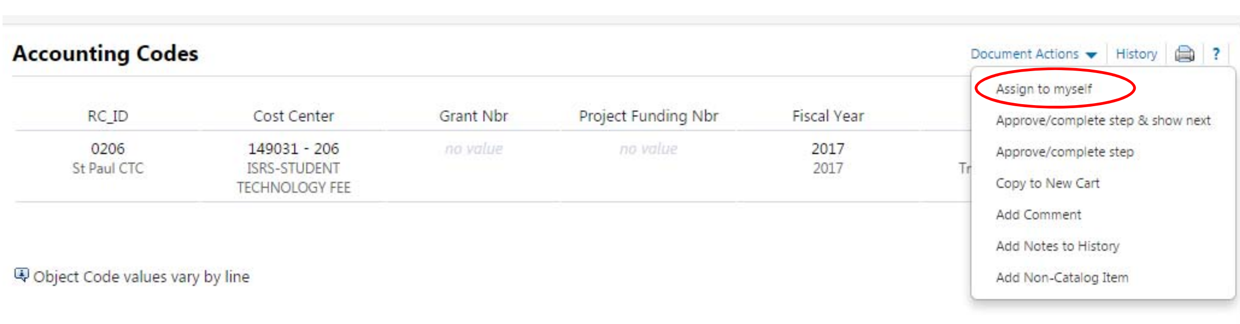
You can also change the line item. (Depending on the number of lines on the order, you may need to check the box for the line item and then hit edit.) In our example, click the blue **Detailed Edit . . .** link gave us access to change the only line item on the order.





Other Changes

If the action you need to take is not listed, select **Assign to myself** from the **Document Actions**. Notice that now you are given a few more options.



- ### Return to the Requisitioner

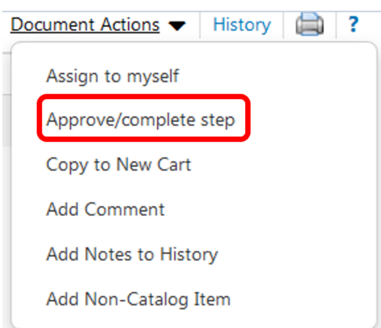
If a change needs to happen to a catalog order's line item, the only role that can make that change is the Requestor. In this case, you would select the **Return to the Requisitioner** option.

- ### Reject Requisition

You may have been requested to stop processing the requisition. A decision was made not to place the order at this time. Selecting **Reject requisition** will send the order back to the Requestor. Nothing further can be done on this document. If they later decide to place the order, will they will need start the process from the beginning.

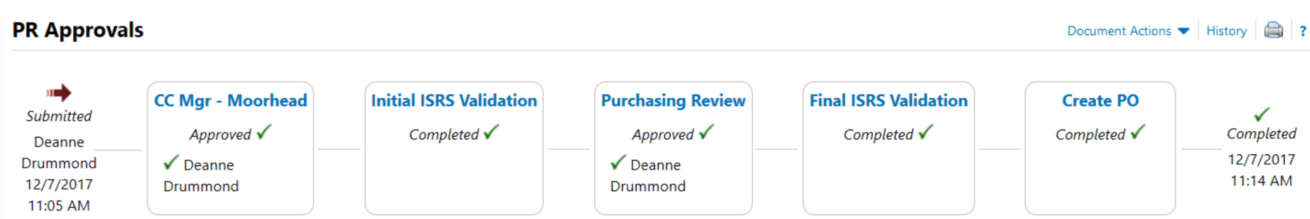
- ### Final Requisition Approval

To approve a requisition after it has been reviewed, select the 'Document Actions' option and select 'Approve/Complete step'



After the requisition is approved, you may receive the following system generated message "No document found". You can ignore this message.

A completed requisition will look like this with detail of who submitted it and approved it. It will also show the steps the requisition went through:



Other Approvals

All approvals are completed at a requisition level. Normally, your requisitions will need approval from the employee with Delegation of Authority and from the Purchasing Department.

There are additional workflows which are determed by commodity code and/or cost center for IT Equipment Review, Hazardous Material Notification/Approval, and Grant Approval depending on the institution. There is also a system review by the Vice Chancellor for requisitions over $100k.

These additional steps will occur when the requisition includes any of the following:

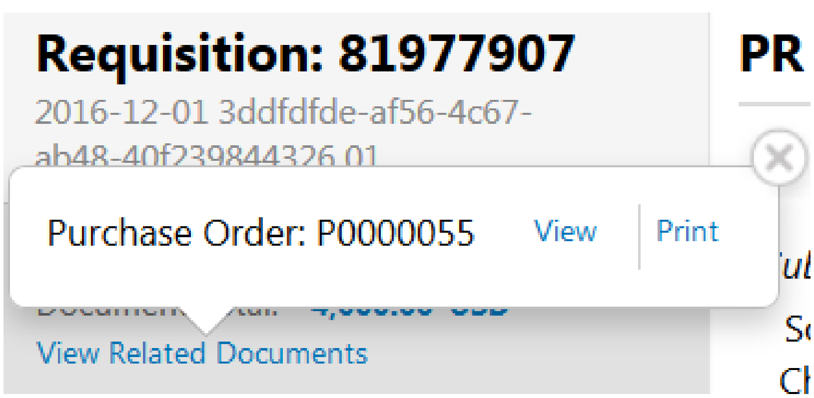
- IT Software or various IT items will go through an additional IT approval step. This is triggered by the object code/commodity code which is also reviewed by the Purchasing Department. This is not set up for MSUM at this time but will be a future enhancement.

- If the total amount of the PO is over $100,000, it will automatically be sent to the system Vice Chancellor for additional approval.

Purchase Order

The Purchase Order is created after final processing/approval by Purchasing. The final purchasing step creates the Purchase order and distributes it to the vendor, based on the distribution method chosen when creating your requisition. See page 13.

You can search for a Purchase Order directly using the number or indirectly by locating the Requisition and selecting 'view related documents'.



RECEIVING

Requestors will receive all catalog, non-catalog and blanket orders.

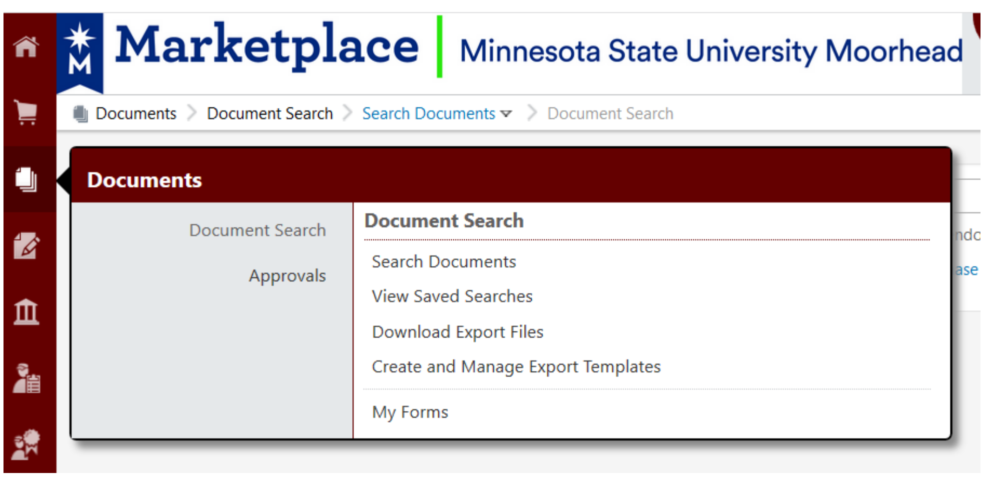
Two types of receiving:

- Quantity – Orders for catalog, non-catalog or services received will require the Requestor to confirm the date and the quantity received as a **Quantity Receipt**.
- Cost – Blanket orders require the Requestor to enter in the dollar amount of the product or service received as well as the date received and attached a service receipt as a **Cost Receipt**.

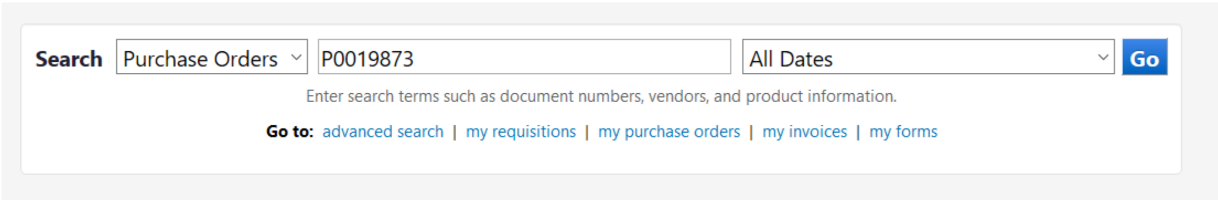
Three Methods to find the Purchase Order to Receive

Method One

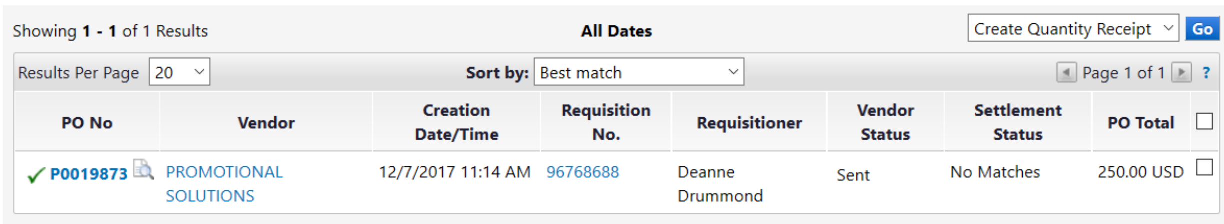
If you know the purchase order number, your best bet is to use Document Search.



Select **Purchase Orders** from the drop down box in the first field and enter the PO # -- then click the blue **Go** button.

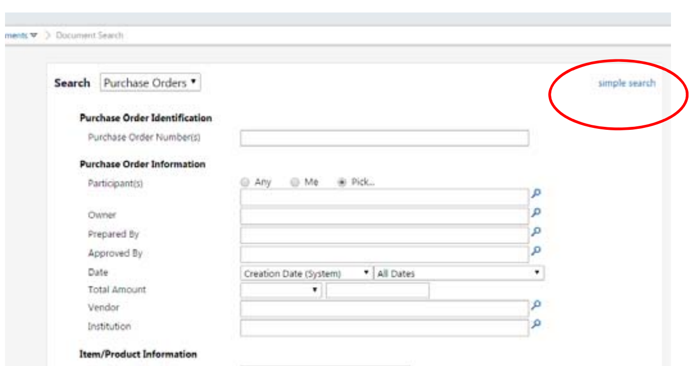


A list should appear.

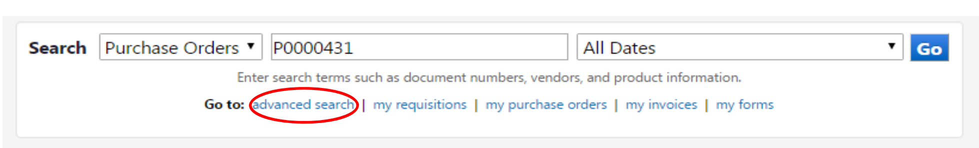


Method Two

If the PO # isn't known, clicking **Advanced Search** will allow you to search by many different options (Who placed the order, who approved the order, the probably date range, vendor name, catalog number, commodity code, etc.). You can access Advanced Search from either the Home Page or the menu item Documents > Search Documents (see the Blue Sidebar). You will need to scroll to view all the possible options.

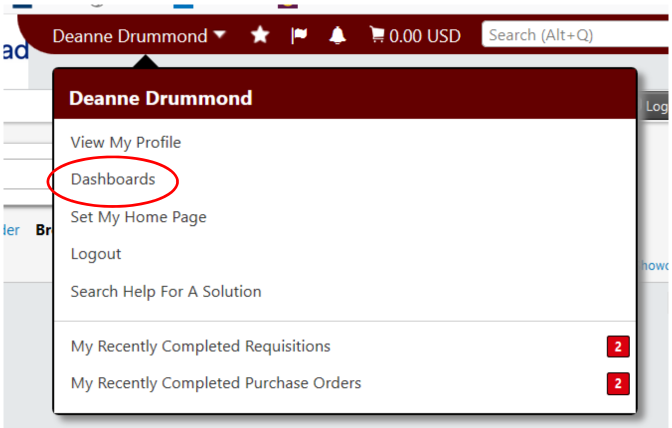


Clicking **simple search** will display the simple search box as shown below.

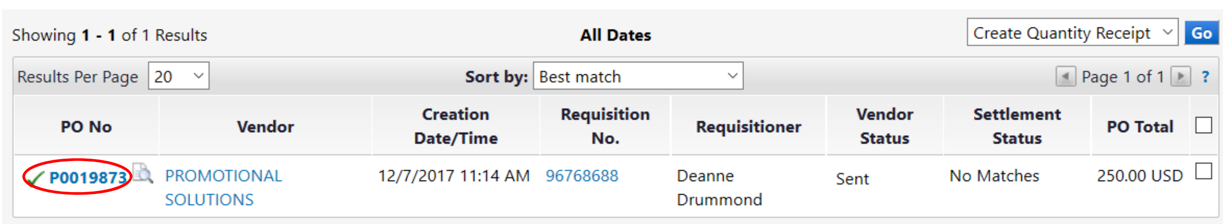


Method Three

Go to your dashboard.



All the orders you initiated in the Marketplace will display in the **My Purchase Orders** widget or your saved search. Click on the blue **Number** link to begin the receiving process.

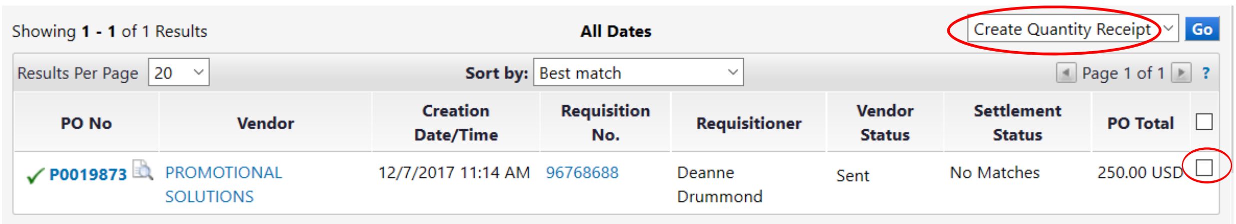


PO No	Vendor	Creation Date/Time	Requisition No.	Requisitioner	Vendor Status	Settlement Status	PO Total
P0019873	PROMOTIONAL SOLUTIONS	12/7/2017 11:14 AM	96768688	Deanne Drummond	Sent	No Matches	250.00 USD

Receiving an Order: Quantity Receipt

Quantity Receipts are used to receive: Purchase orders for services received
Catalog Orders
Non-catalog oders

Once the purchase order is located, check the box on the right of the Purchase Order selected > then select **Create Quantity Receipt** in the drop down box > then **Go**

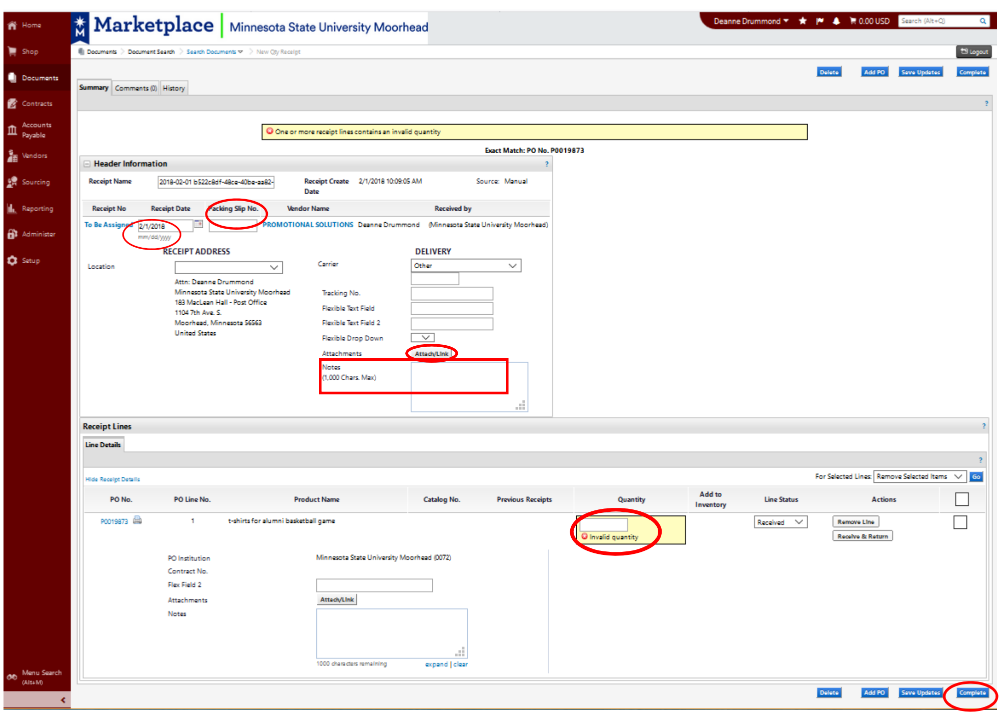


In the next screen you will enter

- the **actual day** the product was received if it is different than the date that defaults in **Receipt Date** (This is the occurrence date and is a VERY important detail for our auditors.)
- **Packing Slip No.** (If there is none, enter the received date again)
- attach a scanned copy of the packing slip in **Attach/Link** (see instructions below)
- Enter any useful notes that you will want to retain about the shipment
- the quantity received on each line item in **Quantity**

To finish, click the blue button called **Complete.** You will receive confirmation that a receipt has been created.

Note: If this was only a partial shipment, enter the exact quantity you received. When the remainder of your order comes in you can create another receipt against the same purchase order.

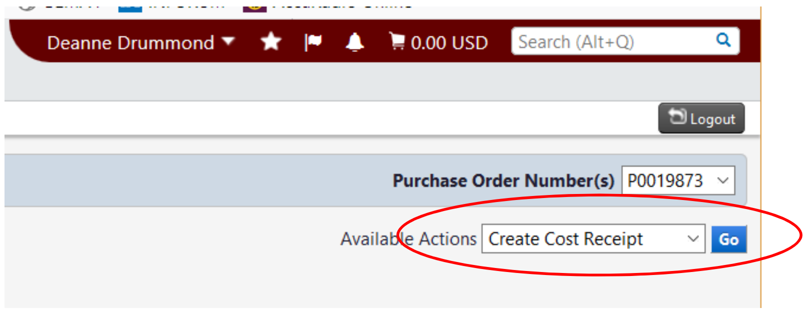


Receiving a Blanket Order: Cost Receipt

To receive an order that has been shipped against a Blanket Order, the **Cost Receipt** function must be used. As the Requestors place orders with the vendor, a log of what items and their quoted prices should be maintained. This order information will be needed when the order arrives and a **Cost Receipt** needs to be entered.

Find the Blanket Order's Purchase Order Number.

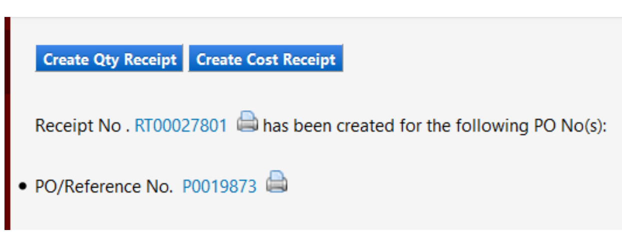
Once the purchase order displays, follow the receiving instructions but make sure you select **Create Cost Receipt** from the **Available Actions** menu for a Blanket Order. Click **GO**.



1) The system will default to "today's date in the **Receipt Date**. If this isn't the actual date the product was received, please overwrite that system date with the **exact date** the product was received. The auditors/accountants call this the "occurrence date" and for the purposes of calculating the expenses for either the month or the fiscal year, an accurate receiving date is important.
2) Enter the **Packing Slip No.**

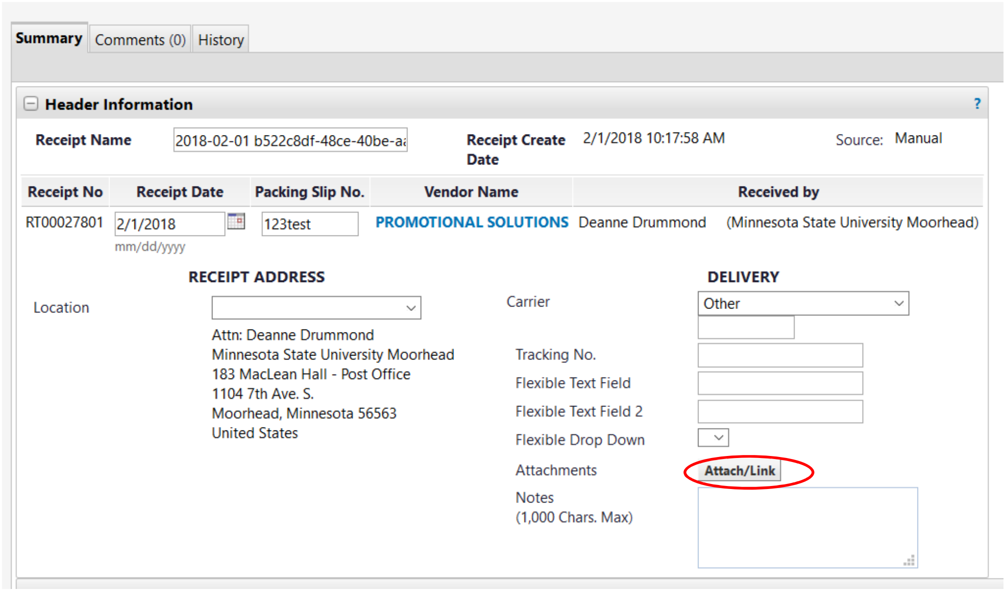
   Note: If your vendor sent an invoice with the shipment instead of a packing slip, use this as the packing slip number. **Please send the hard copy invoice to Business Services.**

3) **Attach/Link** the scanned packing slip. See the instructions for attaching a packing slip.
4) In **Notes** enter a brief description of the product received.
5) In the **Cost** field of **Line Details**, delete the amount displayed (this will be the entire remaining balance of the blanket order) and enter the exact amount of the order. The cost amount will either come from your "order log" or from some documentation from the vendor that listed the quoted cost of the order.
6) Click **Save Updates** and then **Complete.** You will receive confirmation that a receipt has been created.

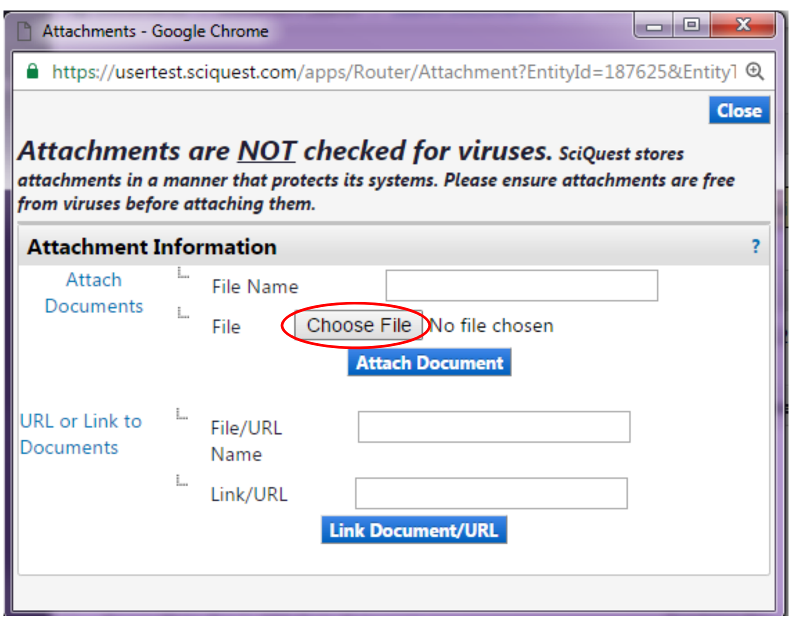


How to Attach a Scanned Packing Slip

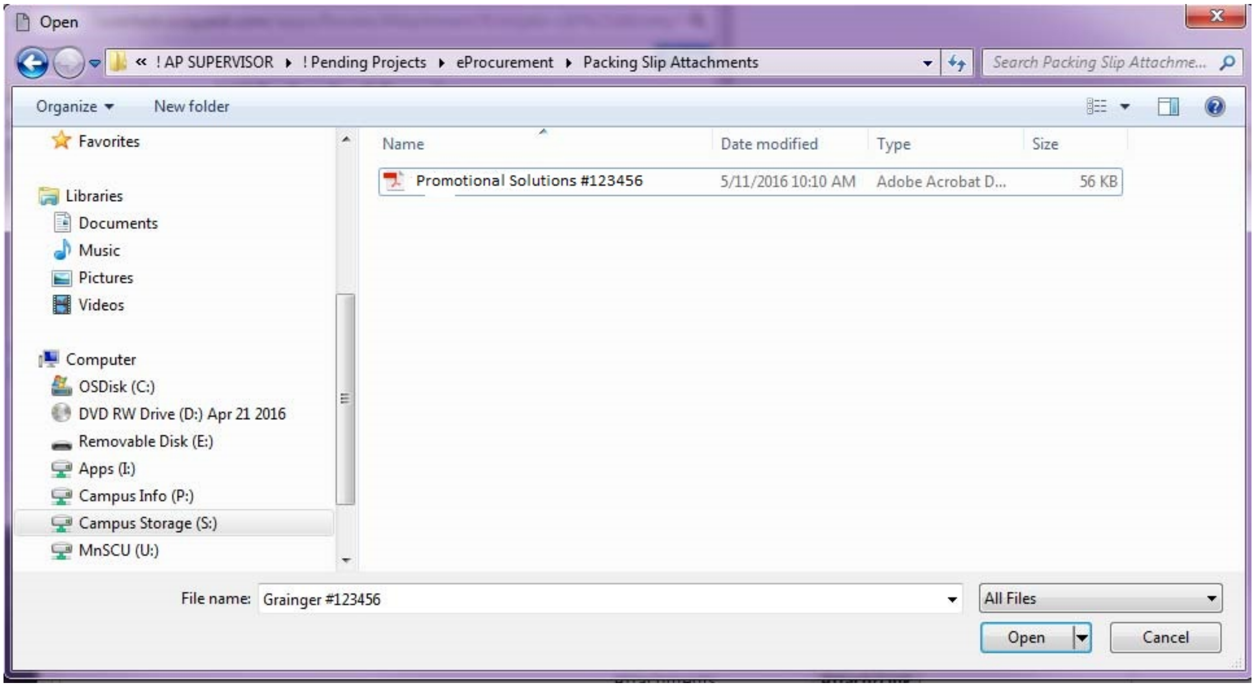
Click the **Attach/Link** button on the Receiving screen.



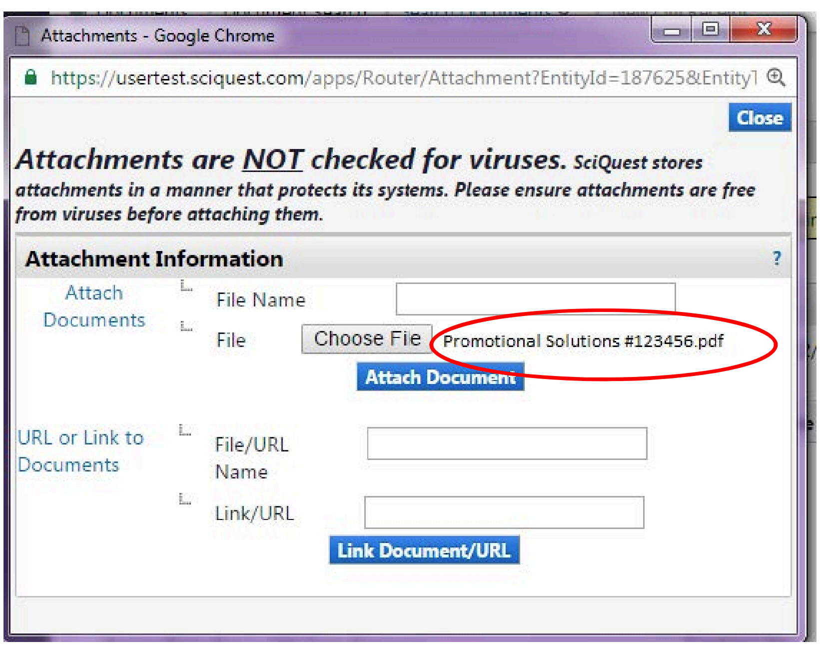
Select **Choose File** to find the scanned packing list file.



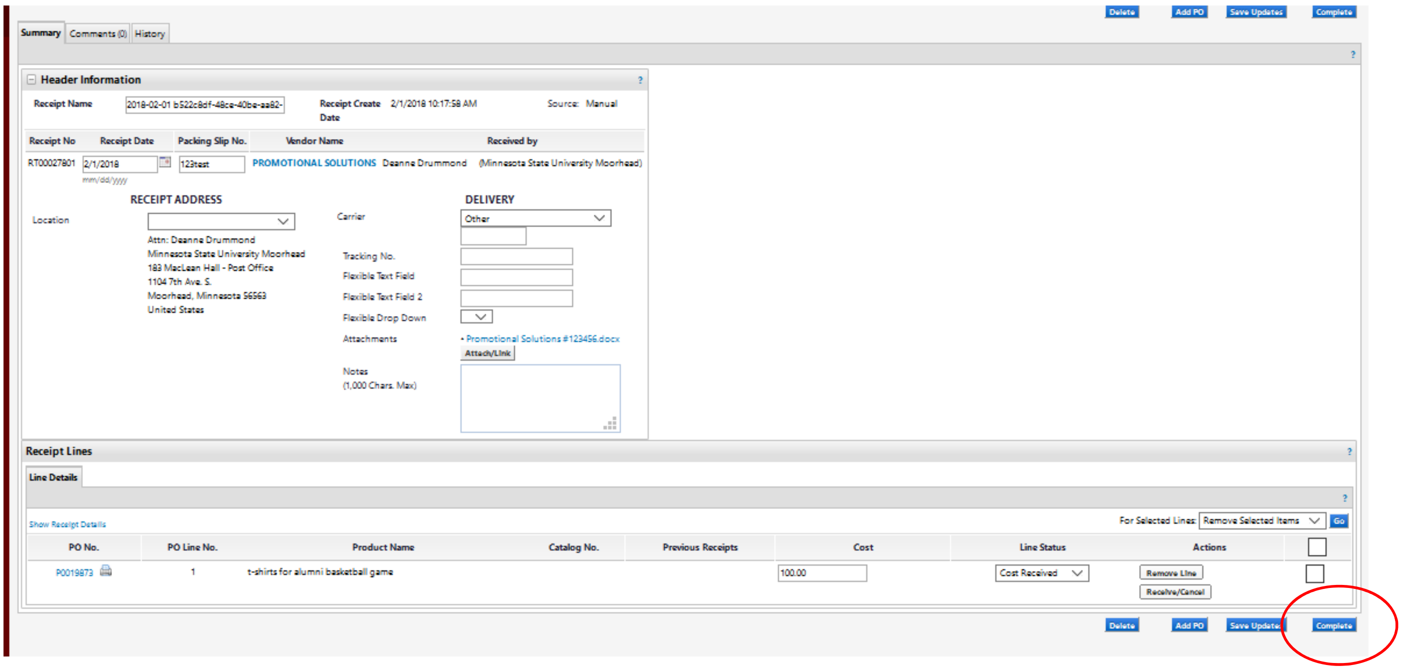
Navigate to your Scanned Packing Slip folder and find the packing slip. Highlight the file - then click **Open.**



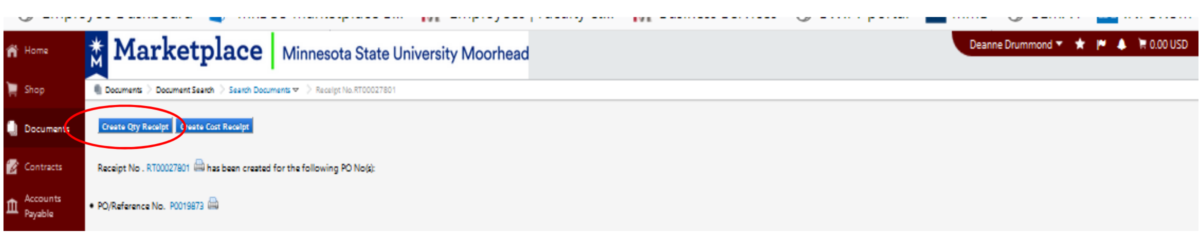
This will bring you back to the Attach/Link dialog box where you will see the sample Promotional Solutions #123456.pdf file listed. Now click on the blue button **Attach Document.** Hit the blue button **Close** in the upper right hand corner if the dialog box remains open.



To complete the receiving, click on the blue button **Complete** in the lower right hand corner.



The next screen will confirm that a receipt has been created. In our example, **Receipt No. RT00027801.** If you have more to receive, click the blue button **Create Qty Receipt**.



Write the **Receipt No.** (RT00027801), your signature and initials on the packing slip and forward the packing slip to the Business Office.

Need Help?

For additional assistance, contact your university system administrator.

Additional Documentation

Additional information and training materials are available at the SharePoint link below.

https://mnscu.sharepoint.com/sites/mnscuprocurement/SitePages/Home.aspx

Instructions for accessing SharePoint:

SharePoint Basic User Guide

Recommend Internet Explorer browser

Go to the Minnesota State Marketplace SharePoint site (note: you may want to bookmark this site for future reference): https://mnscu.sharepoint.com/sites/mnscuprocurement

This will route you to Office365 login screen.

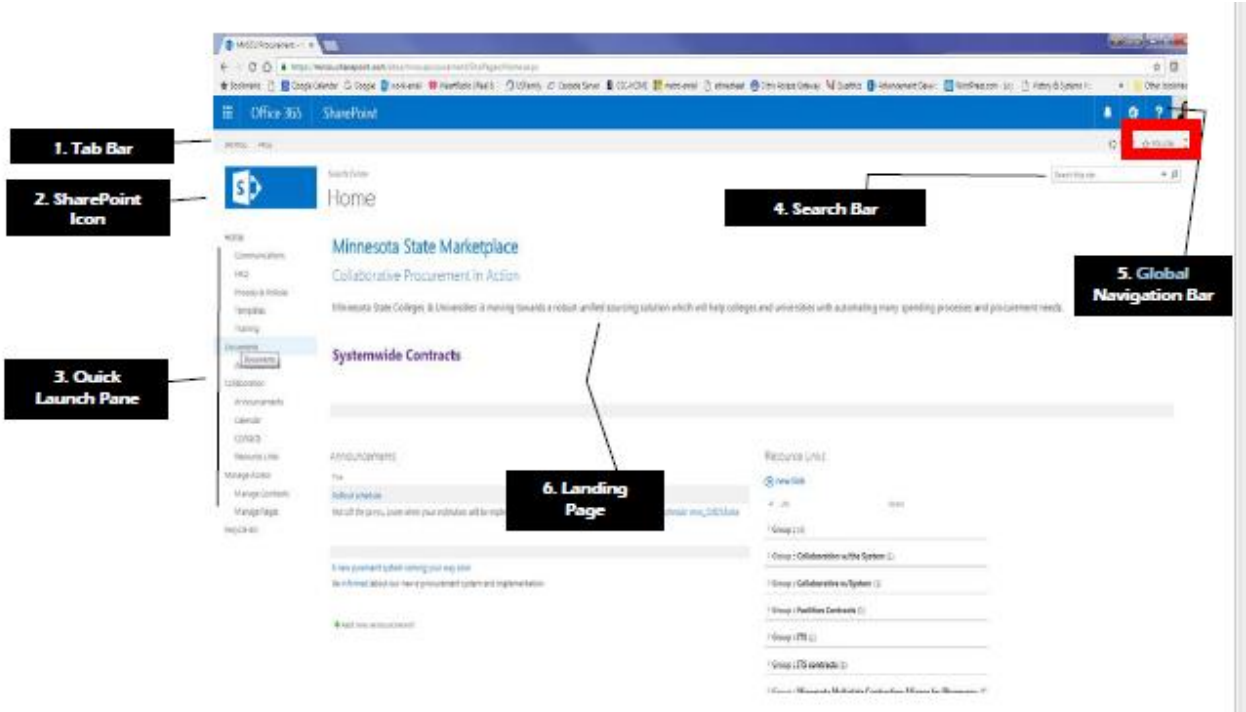
Login Instructions:

When you log into the site, you'll need to append "@minnstate.edu" to your StarID as part of your user name, such that it looks like ab1234cd@minnstate.edu. The password is the regular password associated with your StarID.

If you have any troubles, you may put in a ticket at: https://servicedesk.mnscu.edu

Getting Started

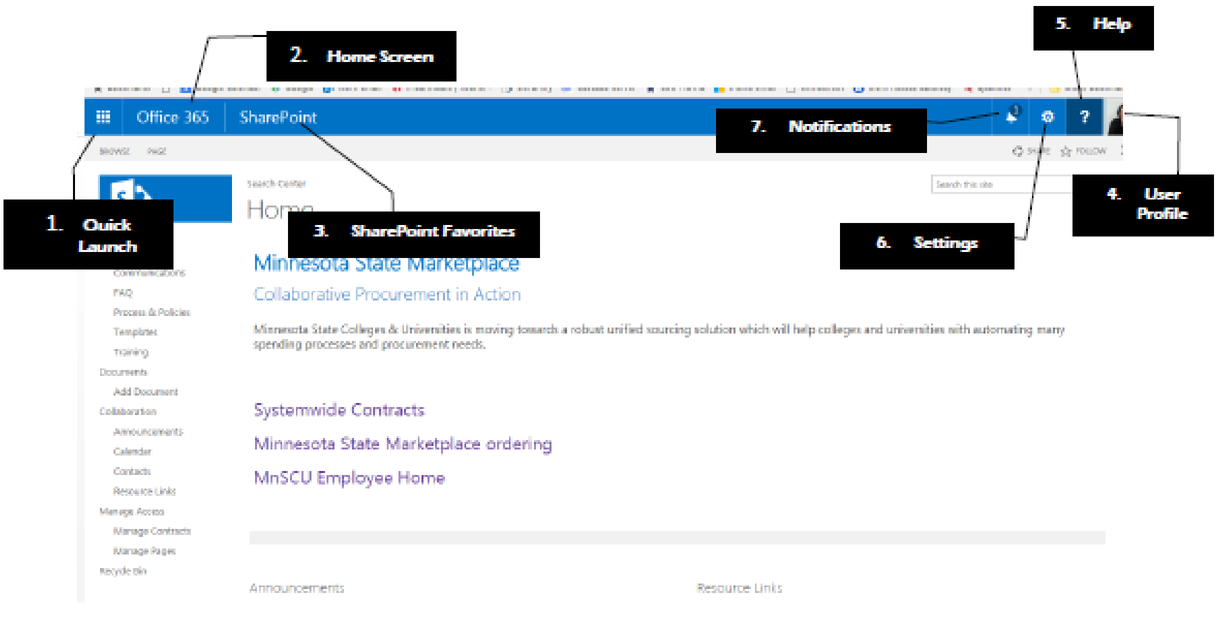
Learning the SharePoint Window Screen and Commands



1. Tab Bar – allows the user to open the Ribbon Command
2. SharePoint Icon – returns you to the default home page.
3. Quick Launch Pane – contains shortcuts to common content on the site
4. Search Bar – allows you to search the site
5. Global Navigation Bar – contains shortcuts to major hub center of SharePoint. Learn more on the following page.
6. Landing Page – contains page content

Note:
In the tab bar, you can follow a site which will allow you to bookmark it for easy accessibility.

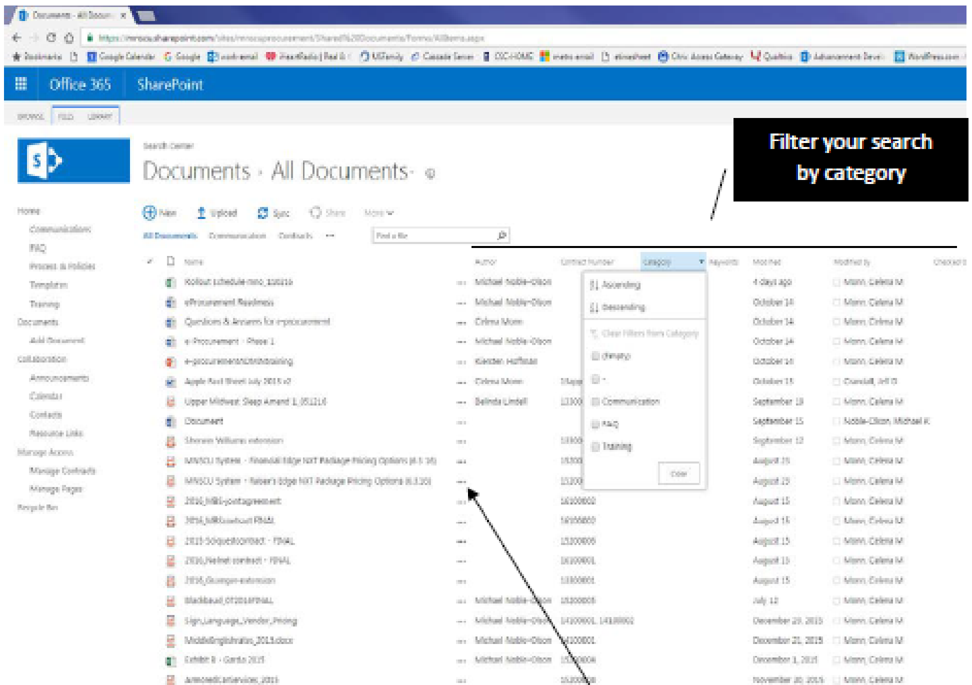
Using the Ribbon

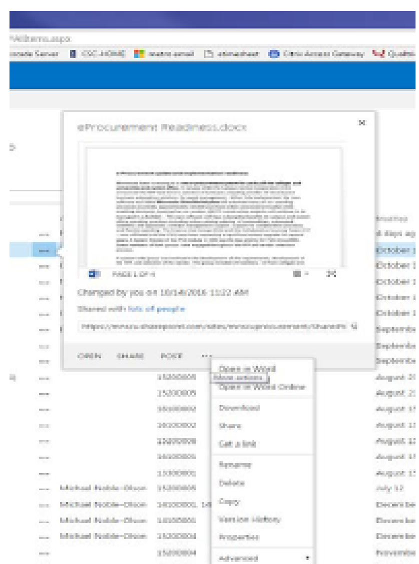


1. Quick Launch List – contains a dropdown list of shortcuts to Office365 software programs
2. Office 365 Home Screen – Home screen for Office 365
3. SharePoint Favorites – contains a list of SharePoint sites you follow – easy accessibility
4. User Profile – provides your account information, including a picture and signing out
5. Help – allows you to search information or contact the helpdesk for assistance
6. Settings – This allows you to customize the look and feel of Office365
7. Notification Icon – connects with your outlook and provides notifications on when you receive an email, task, appointment.

Documents

You may use the quick launch pane to find documents with a category; or simply click on the documents icon which will allow you to filter through all the documents on this site.





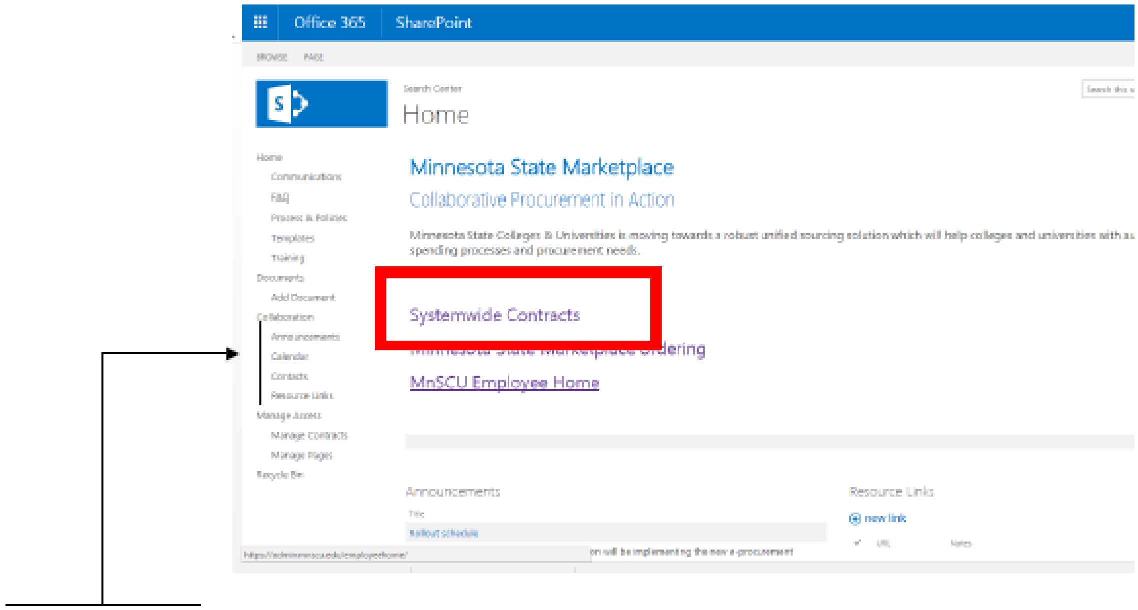
Open a Document
Click on the "Name" of the document you want to open

Depending on the document, you are able to open, edit, print, download, share, etc. within the site.

Other Menu items
By clicking on the three "…" you bring up a menu box. This will allow you to open, share, copy, etc…

Upload a document
Click on the "**add document**" from the quick launch and browse for your document. Please complete the properties so that it is filed in the correct categories and easily searchable.

Other Resources



Announcements
The CSC will utilize **announcements** board to post ongoing communicate about sourcing and procurement activities.

Calendar
The CSC will use the calendar to post project timelines/deadlines, meeting dates, contract expirations, etc…

Contacts
A list of internal and external vendor key contacts and contact information

Resource Links
The CSC will provide helpful links to internal and external information (i.e. vendors, policies, or partner contracts, etc.)

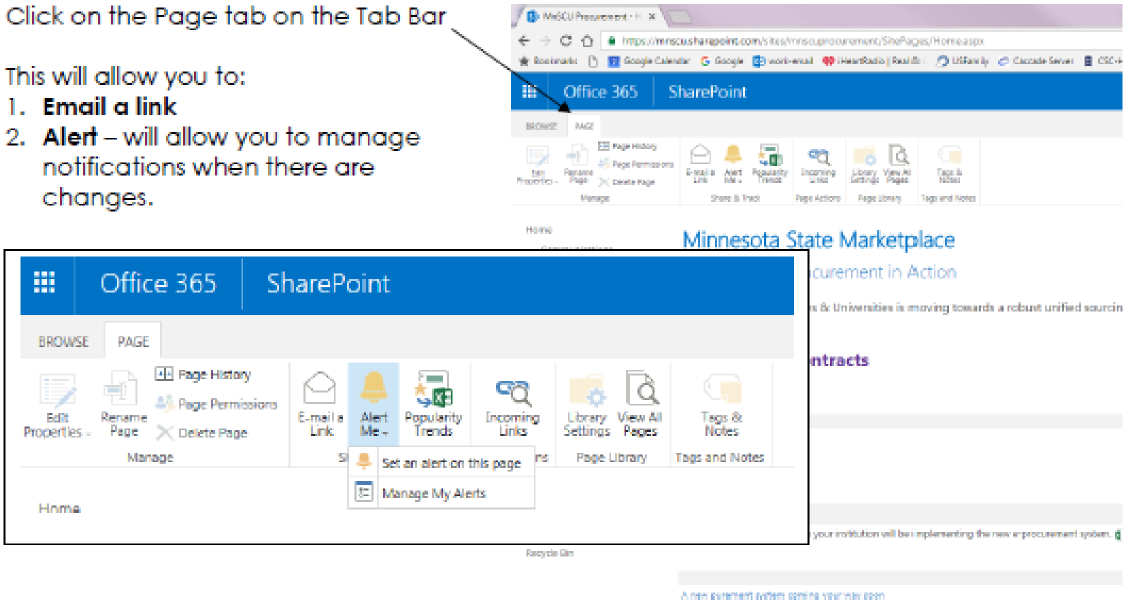
Systemwide Master Contracts
All Systemwide master contracts are posted on this site and will be maintained here until Minnesota State **Marketplace** is fully functional. Once **Marketplace** is fully functional, contracts and other links related to purchasing will be moved there for easy access. To view the list, simply click on the "**Systemwide Contracts**" link – as shown above.

Other Features:

Click on the Page tab on the Tab Bar

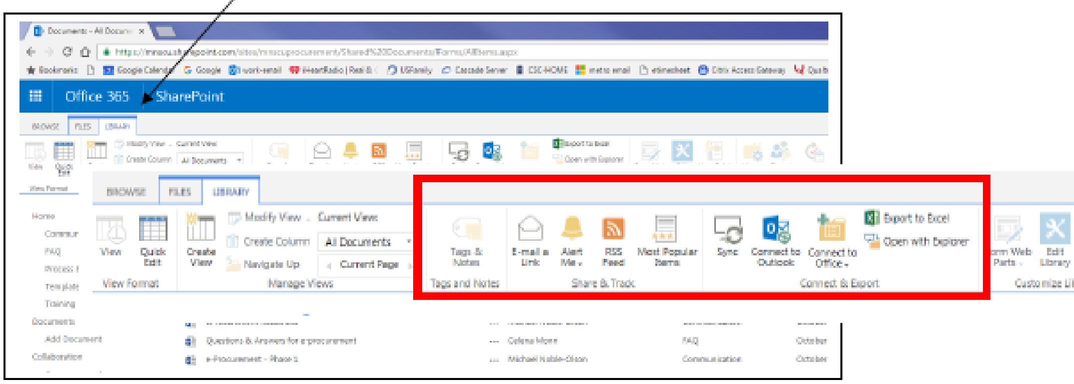
This will allow you to:

1. **Email a link**
2. **Alert** – will allow you to manage notifications when there are changes.



SharePoint syncs with Office

Click on the Documents OR Calendar OR Announcement from the Quick Launch Bar
Click on the "Library" tab
You can set up alerts on documents, connect to outlook, export into Office suite



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