

Minnesota State Marketplace

User Guide

Minnesota State
University Moorhead

January 2018

Minnesota State Marketplace – Basic User Guide

Shopping through Purchase Order

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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.

Employee Home

Employee Applications

[Tuition Waiver](#) - The Tuition Waiver application for MnSCU employees

[Supervisor View](#) - Supervisor View of Employee Data

[Security Administration](#) - Requesting and approving ISRS security requests

[Faculty](#) - Faculty Application

[eTimesheet](#) - eTimesheet application for MnSCU employees

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:

Search Clear

17 Web Roles found.

(Add checked Web Roles)

Web Role Name	Description	Approval Group	Web Permissions / Reports
<input type="checkbox"/> PC_MARKETPLACE_BUYER	Buyer	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_CONTRACT_ADMIN	Contract Administrator	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_CONTRACT_MGR	Contract Manager	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_DEPT_APPROVER	Department Approver	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_INST_SYS_ADMIN	Institution System Admin	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_PAYMENT_VOUCHER	Accounts Payable	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_PURCHASING_LEAD	Purchasing Lead	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_PURCHASING_TEMP	Purchasing Temp	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_RECEIVING	Receiving	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_REQUESTOR	Requester	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_SHOPPER	Shopper	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_SOURCING_VIEW	Sourcing Read Only	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_CONTRACT_APPROVER	Contract Approver	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_CONTRACT_READ_ONLY	Contract Read Only	Finance	▶
<input type="checkbox"/> PC_MARKETPLACE_SOURCING_EVENT_MGR	Sourcing Event Manager	Finance	▶
<input type="checkbox"/> PC_MRKTPLACE_SOURCING_APPROVER	Sourcing Approver	Finance	▶
<input type="checkbox"/> PC_MRKT_SOURCING_EVENT_CREATOR	Sourcing Event Creator	Finance	▶

(Add checked Web Roles)

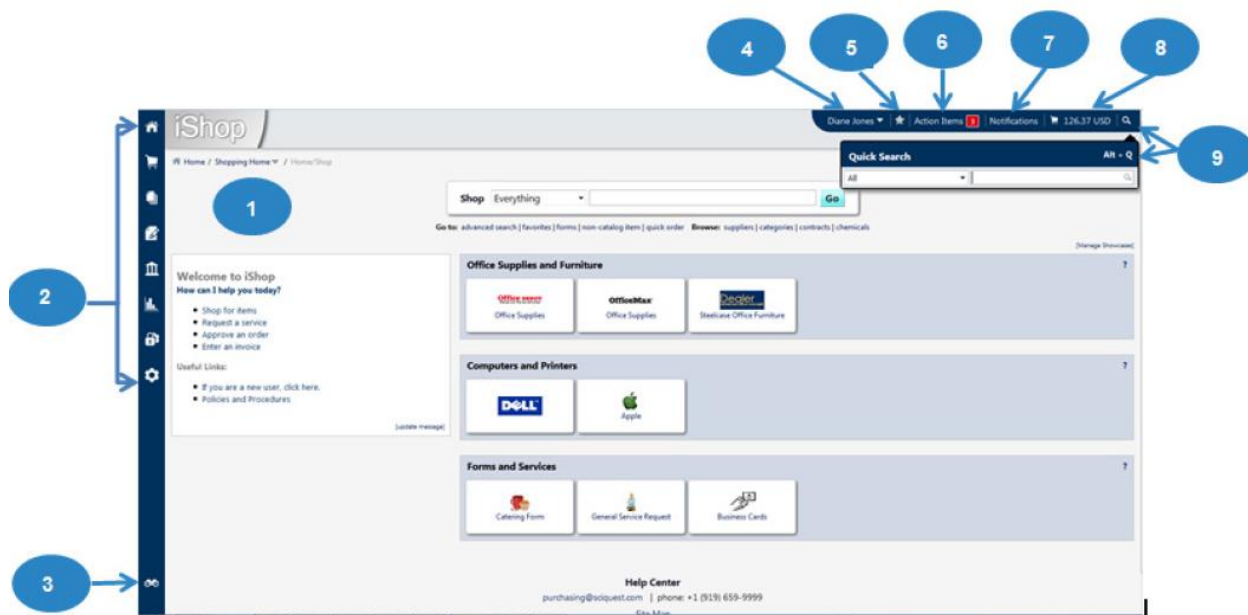
Once your security request is approved follow the login instructions below:

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

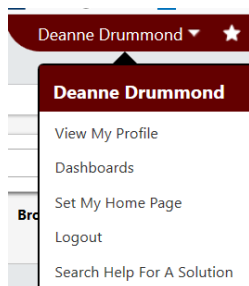
Navigating in the Marketplace (after login)



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

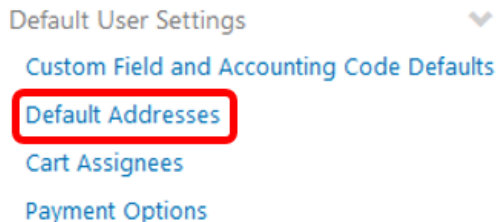
To start, select the dropdown icon next to your name in the top right of the **Marketplace**. Once selected, chose 'View my Profile'.



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'

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:

Select Address Template	
Select Address Template	MSU Moorhead - Receiving

Select Address Template	
Select Address Template	MSU Moorhead - AP

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:

Edit Selected Address	
Nickname	MSU Moorhead - Receiving
Default	<input checked="" type="checkbox"/>
Current Default Address	MSU Moorhead - Receiving
ADDRESS	
Attn:	Deanne Drummond
Contact Line 2	Minnesota State University Moorhead
Address Line 1	183 MacLean Hall - Post Office
Address Line 2	1104 7th Ave. S.
City	Moorhead
State	Minnesota
Zip Code	56563
Country	United States
Save	

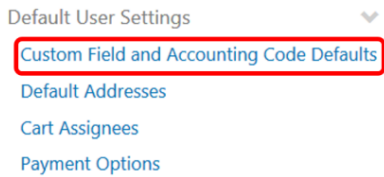
Bill to:

Edit Selected Address	
Nickname	MSU Moorhead - AP
Default	<input checked="" type="checkbox"/>
Current Default Address	MSU Moorhead - AP
ADDRESS	
Contact Line 1	Minnesota State University Moorhead
Contact Line 2	Business Services - Accounts Payable
Contact Line 3	218-477-2061
Address Line 1	1104 7th Ave S
City	Moorhead
State	Minnesota
Zip Code	56563
Country	United States
Save	

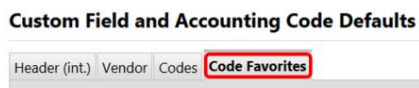
Accounting Defaults and Favorites

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:

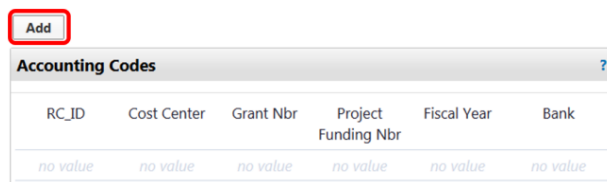
1. After selecting 'View my Profile' select 'Default User Settings' then 'Custom Field and Accounting Code Defaults'.



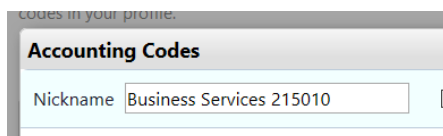
2. Select the 'Code Favorites' tab



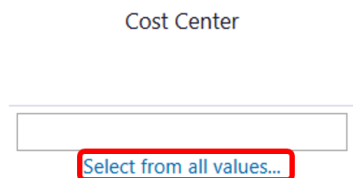
3. Select the first 'Add' button



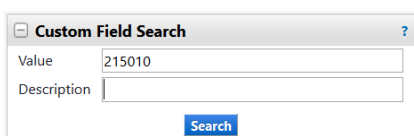
4. Choose a 'Nickname' that will assist you in knowing what cost center to use – we also recommend entering the cost center number as part of the name. For example 'Business Services 215010'.



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)

Results Per Page	20	Values Found 1	Page 1 of 1
Value	Description		
215010 - 072	Business Services		select

- 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.

Fiscal Year

2018

- The finished product should look like this:
Before saving -

Accounting Codes
? X

Nickname ☐ Default

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	add split
<input type="text" value="0072"/> Select from profile values...	<input type="text" value="215010 - 072"/> Select from profile values... Select from all values...	<i>no value</i>	<i>no value</i>	<input type="text" value="2018"/>	T	

After saving –

Accounting Codes					
Business Services 215010 (default)					
RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank
0072	215010 - 072	<i>no value</i>	<i>no value</i>	2018	T
MSU	Business			2018	Treasury
Moorhead	Services				Account

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**

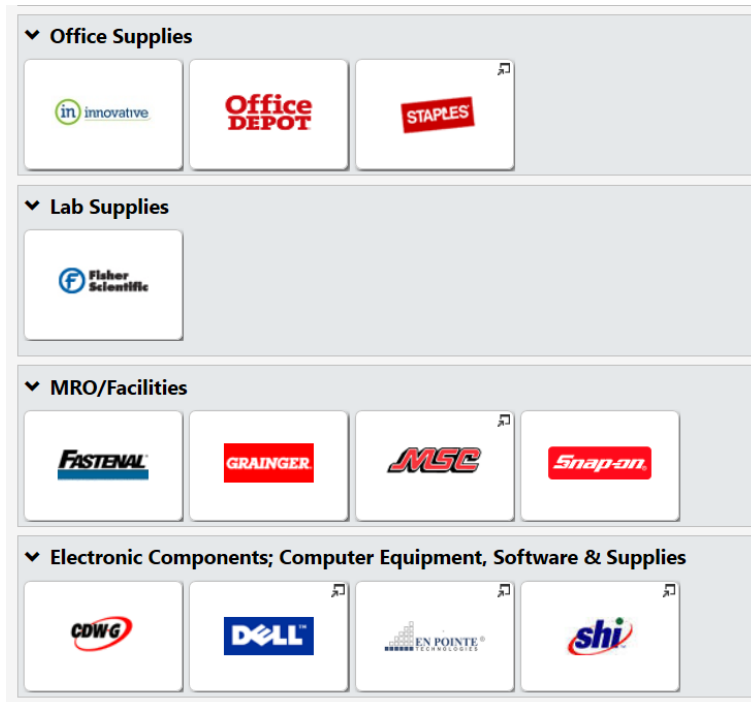
Punch-out Catalog: Redirected to vendor site

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:

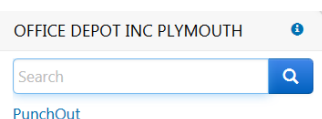


Shopping for items within a Punch-out catalog is much like other online shopping experiences. Here is an example:

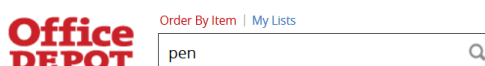
1. Select 'Office Depot'



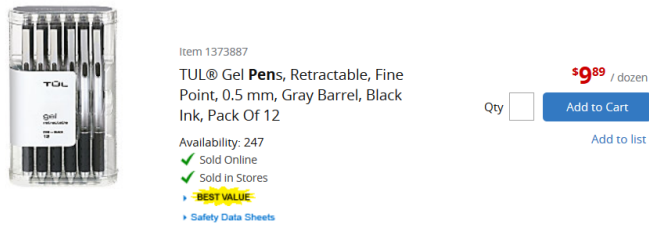
2. Perform a quick search or select the 'Punch-out' link



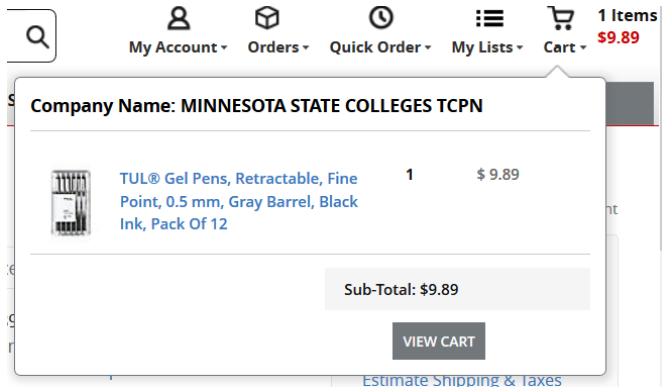
3. Once you are connected to the Office Depot site. Searching for pens is easy:



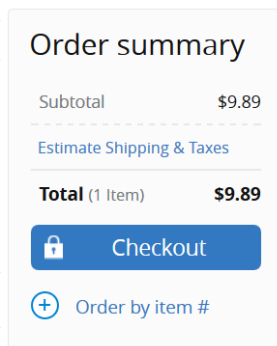
4. A list of items will appear. Find the one you want, enter the appropriate quantity and then select 'ADD TO CART'.



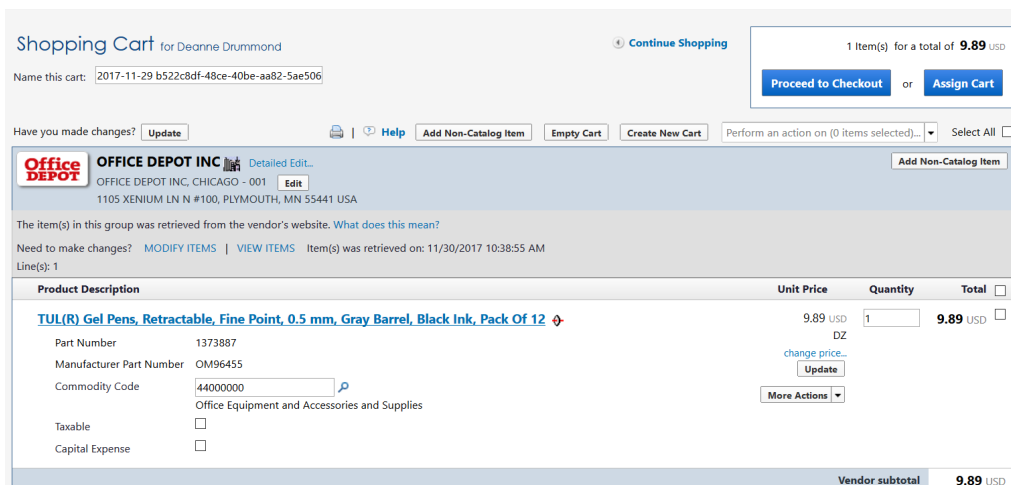
- View your cart and checkout once you are finished shopping. Note that the checkout view and process may vary slightly among vendors' punchout sites.



- Checkout



- 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.

Shop

Everything

pens

Go

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.

Shop

Everything

engraving pen

Go

[Go to: advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) **Browse:** [vendors](#) | [categories](#) | [contracts](#) | [chemicals](#)




Results for: Everything : engraving pen

Showing 1 - 20 of 27 Results Compare Selected: 0


Results Per Page: 20

Sort by: Best Match

Page 1 of 2

 larger image	AIR ENGRAVING PEN from SNAP ON INDUSTRIAL C Part Number: AT187 Manufacturer Info: AT187 - (Snap-on Industrial)	135.02 USD EA 1 Add to Cart add favorite compare
 larger image	AIR ENGRAVING PEN from SNAP ON INDUSTRIAL C Part Number: 5980 Manufacturer Info: 5980 - (Snap-on Industrial)	60.23 USD EA 1 Add to Cart add favorite compare
 larger image	Engraving Pen 1 CFM from GRAINGER W W INC Part Number: 21AC06 Manufacturer Info: 21AC06 - (SPEEDAIRE)	Order from Vendor EA add favorite compare

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


[larger image](#)

AIR ENGRAVING PEN from SNAP ON INDUSTRIAL C
Part Number: AT187
Manufacturer Info: AT187 - (Snap-on Industrial)

135.02 USD
EA
2 [Add to Cart](#)
[add favorite](#) | [compare](#)

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

rtal

MMB

SEMA4

INFORUM

AccuRadio Online


Deanne Drummond

135.02 USD

Search (Alt+Q)

My Cart

2017-11-29 b522c8df-48c...

**AIR ENGRAVING PEN**
Quantity: 1
Price: 135.02 USD

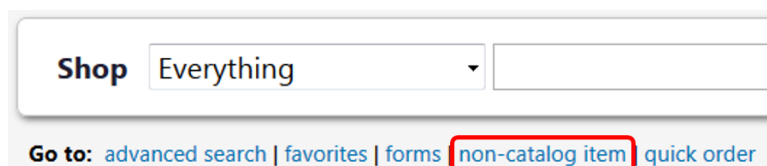
[View My Cart](#)
[Checkout](#)

135.02 USD

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



Shop Everything

Go to: [advanced search](#) | [favorites](#) | [forms](#) | **non-catalog item** | [quick order](#)

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



Non-Catalog Item

Enter Vendor
CDW GOVERNMENT INC 
[Vendor Search](#)

Product Description	Catalog No.
<input type="text"/>	<input type="text"/>

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



Non-Catalog Item

CDW GOVERNMENT INC  [select different vendor](#)

Fulfillment Address CDW GOVERNMENT INC, CHICAGO - 001: (preferred)
75 REMITTANCE DR #1515
CHICAGO, IL 60675-1515 USA
[select different fulfillment center](#)

☒ [Distribution Methods](#)


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

☐ Check this box to customize order distribution information.


Email (HTML Attachment) eprocurement@cdwg.com

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.

Non-Catalog Item

CDW GOVERNMENT INC  [select different vendor](#)

Fulfillment Address CDW GOVERNMENT INC, CHICAGO - 001: (preferred)
75 REMITTANCE DR #1515
CHICAGO, IL 60675-1515 USA
[select different fulfillment center](#)

 **Distribution Methods**

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

☒ Check this box to customize order distribution information.

Fax

☐ +1 847-990-8090

Email (Plain Text)

☐

Email (HTML Attachment)

☒ eprocurement@cdwg.com

Manual



☐

Product Description	Catalog No.	Quantity	Price Estimate

5. Enter the product description

Product Description	Catalog No.	Quantity	Price Estimate	Packaging
T-shirts for Alumni basketball game		50	5.00	EA - Each




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.

 **Commodity Code Search** 

Code starts with...

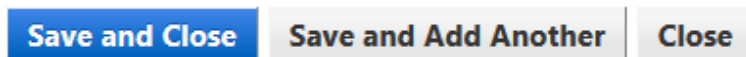
Description contains...

[Search](#)

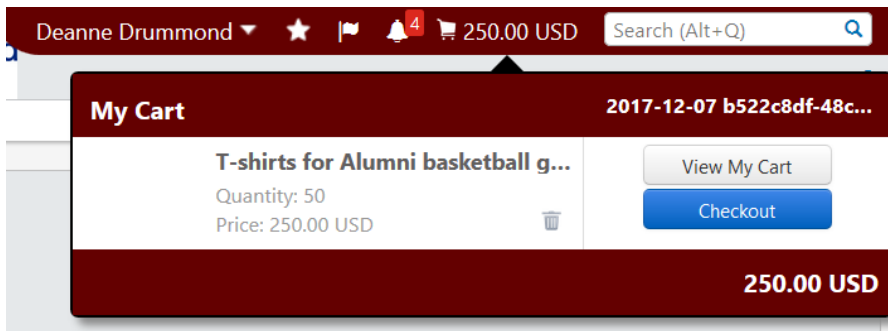
Results Per Page **Results 2**  Page 1 of 1  

Code	Description	
42130000	Medical apparel and textiles	select
53000000	Apparel and Luggage and Personal Care Products	select

7. Select one of 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.



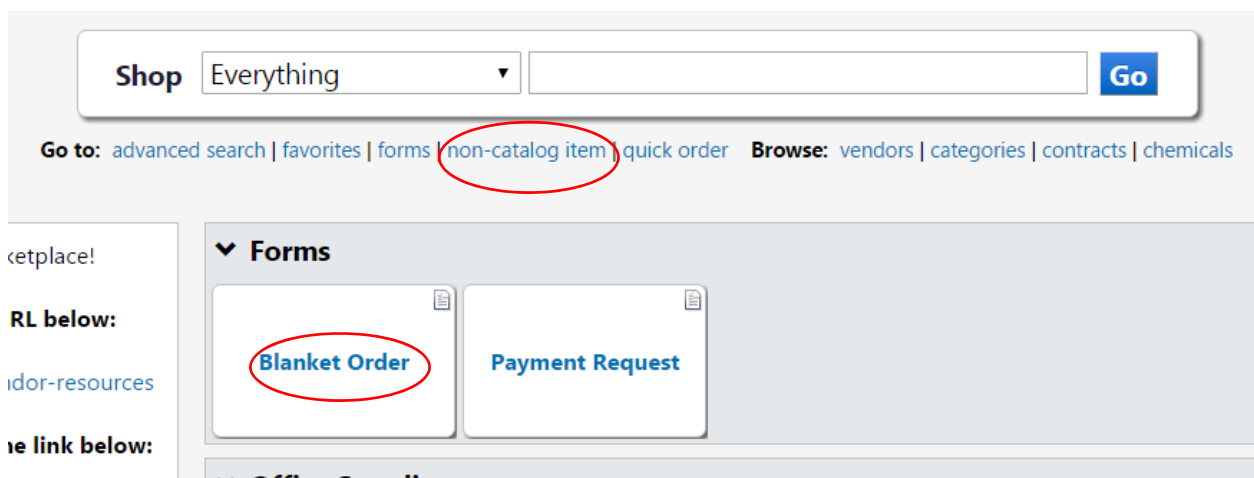
Blanket Orders:

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.

Blanket Order

Available Actions: Add and go to Cart **Go** Close

MINNESOTA STATE
Extraordinary Education. Exceptional Value.

Instructions
Use this form to request a blanket order for services or goods.

Supplier Information

Vendor
AUTO VALUE [Detailed Edit...](#)
[select different vendor](#)

Fulfillment Address
AUTO VALUE WILLMAR - 001 (preferred)
87849 Amy Street USA #
WILLMAR, MN 56201 USA
[select different fulfillment center](#)

Distribution
The system will distribute purchase orders using the method(s) indicated below:
Email (Plain Text)
[Submit a New Supplier Request or Supplier Update Request](#) [nobody@scoquest.com](#)

Standing Order Information

Product Description
Auto Parts and Supplies for Fall Semester FY17
208 characters remaining [expand](#) | [clear](#)

Commodity Code
100000000 [search...](#)

Packaging (UOM)
1 LO - Lot

Blanket Order Amount
5,000.00

Start Date
09/15/2016 [mm/dd/yyyy](#)

End Date
12/15/2016 [mm/dd/yyyy](#)

A Contract or Quote may be attached as Internal Attachments below:
Internal Attachments
[Add Attachments](#)

Total 0.00

Your request has now been placed 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.

Shopping Cart for Ronnie Requester1

Name this cart: 2016-12-12 0206req1 02

Have you made changes? [Update](#)

[Continue Shopping](#) 1 Item(s) for a total of 3,000.00 USD

[Proceed to Checkout](#) or [Assign Cart](#)

[Help](#) [Empty cart](#) Perform an action on (0 items selected)... [Select All](#)

AUTO VALUE [Detailed Edit...](#)
AUTO VALUE, WILLMAR - 001 [Edit](#)
87849 Any Street USA #, WILLMAR, MN 56201 USA

Product Description	Unit Price	Quantity	Total
Auto Parts and Supplies for Fall Semester FY17 open form... Commodity Code 100000000 Live Plant and Animal Material and Accessories and Supplies Taxable <input checked="" type="checkbox"/> Capital Expense <input checked="" type="checkbox"/>	3,000.00 USD 1/L0	1	3,000.00 USD

Item added on Jan 4, 2017

[Add to Favorites](#) [Remove](#) [More Actions](#)

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.

[Return to shopping cart](#)

This order is ready to be placed. [Submit Requisition](#) [Assign Cart](#)

Requisition
2016-12-12 0206req1 02

Status: **Draft**
Document Total: 3,000.00 USD
What's next for my order?

Requisition [▼](#)

- General (Prepared For) ☒
- Shipping ☒
- Billing ☒
- Accounting Codes ☒
- Internal Notes and Attachm... ☒
- External Notes and Attachm... ☒

Final Review [Document Actions](#) [History](#) [?](#)

[Expand All](#) [Collapse All](#)

General (Prepared For)

Shipping

Billing

Bill To [edit](#)

Accounts Payable
Phone 6512965331
Room 1240
235 Marshall Avenue
St. Paul, MN 55102
Internal Center

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.

Shopping Cart for Deanne Drummond

Continue Shopping

50 Item(s) for a total of 250.00 USD

Proceed to Checkout or Assign Cart

Name this cart: 2017-12-07 b522c8df-48ce-40be-aa82-5ae506

Have you made changes? Update

Help

Add Non-Catalog Item

Empty Cart

Create New Cart

Perform an action on (0 items selected)...

Select All

PROMOTIONAL SOLUTIONS

Detailed Edit...

Add Non-Catalog Item

Product Description	Unit Price	Quantity	Total
<div>T-shirts for Alumni basketball game</div> <div>Commodity Code 53000000</div> <div>Apparel and Luggage and Personal Care Products</div> <div>Taxable</div> <div>Capital Expense</div>	5.00 USD EA Update	50	250.00 USD
Vendor subtotal			250.00 USD

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

Shipping

Ship To

Shipping address

Attn: Deanne Drummond
Minnesota State University Moorhead
183 MacLean Hall - Post Office
1104 7th Ave. S.
Moorhead, Minnesota 56563
United States

2. Select the appropriate dropdown option, then save.

Ship To

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address

To choose a different address, [click here](#)

Address Details

Attn:

Contact Line 2

Address Line 1

Address Line 2

City

State

Zip Code

Country

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.

Accounting Codes Document Actions ▼ History ?

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	
0076 Metro SU	<div>no value Required field</div>	no value	no value	<div>no value Required field</div>	no value	<div>edit</div>

Accounting Codes ? X

Select from your code favorites

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	
<input type="text" value="0072"/> Select from profile values...	<input type="text" value="215010 - 072"/> Select from profile values... Select from all values...	no value Clear selected value...	no value Clear selected value...	<input type="text" value="2018"/>	T Clear selected value...	<div>add split</div>

[recalculate / validate values](#)

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

1. Select the 'Edit' box.

Accounting Codes Document Actions History ?

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	
0076 Metro SU	no value Required field	no value	no value	no value Required field	no value	edit

- Under the Cost Center, choose 'Select from all values...'

Cost Center

Select from all values...

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

Custom Field Search

Value

Description

Search

- Press 'Select' when your cost center appears

Results Per Page: 20 **Values Found 1** Page 1 of 1 ?

Value	Description	
217050 - 076	FINANCIAL MANAGEMENT	select

- 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

Fiscal Year

- The finished outcome should look like:

Before saving –

Accounting Codes

Select from your code favorites

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	add split
<input type="text" value="0072"/> Select from profile values...	<input type="text" value="215010 - 072"/> Select from profile values... Select from all values...	no value Clear selected value...	no value Clear selected value...	<input type="text" value="2018"/>	T Clear selected value...	

recalculate / validate values

Save Cancel

After saving -

Accounting Codes Document Actions History

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank
0072 MSU Moorhead	215010 - 072 Business Services	no value	no value	2018 2018	T Treasury Account

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'

Internal Note

Internal Attachments

Add Attachments

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

Add Attachments

Attachment Type

☒ File ☐ Link

File ★

Select files...

Maximum upload file size: 4.88 MB

★ Required

Save Changes

Close

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.

Delivery Options

[edit](#)

Expedite

✖

Ship Via

Best Carrier-Best Way

Requested Delivery Date

no value

Submitting and Tracking a Requisition

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

[Return to shopping cart](#)

This order is ready to be placed.

[Submit Requisition](#)[Assign Cart](#)

Requisition
2017-12-07 b522c8df-48ce-40be-aa82-5...
Status: **Draft**
Document Total: **250.00 USD**
[What's next for my order?](#)

Final Review

Document Actions ▾ | History | ?
[Expand All](#) | [Collapse All](#)

▼ **General (Prepared For)**

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.

Requisition Submitted

Next Steps

You can view or print this at: [Requisition 96768688](#), or via the [Document Search](#) page

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	96768688 Quick View
Requisition status	Pending
Cart name	2017-12-07 b522c8df-48ce-40be-aa82-5ae506c4f62d 02
Requisition date	12/7/2017
Requisition total	250.00 USD
Number of line items	1

Tracking a requisition

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

Requisition: 96768688
2017-12-07 b522c8df-48ce-40be-aa82-5...

Status: Pending

Document Total: 250.00 USD

Requisition ▾

Summary

General (Prepared For)

Shipping

Billing

Accounting Codes

Internal Notes and Attachm...

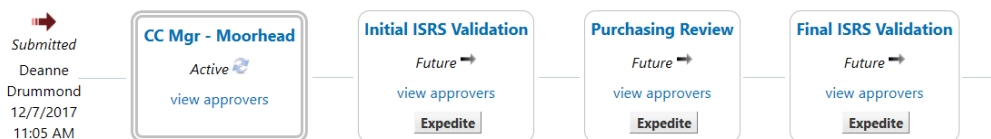
External Notes and Attachm...

Vendor Information

PR Approvals

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

PR Approvals



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

The screenshot shows a dialog box titled 'Workflow Step Approvers (Purchasing Review)'. It lists the 'Approver Group : Purchasing Review - Moorhead - 0072' and provides contact information for two approvers: Deanne Drummond (drummond@mnstate.edu, +1 218-477-2222) and Karen Lester (karen.lester@mnstate.edu). A 'Close' button is at the bottom.

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

The screenshot shows the general search function interface. It includes a search bar with a dropdown menu set to 'Requisitions', a text input field, and a date range dropdown set to 'All Dates'. A 'Go' button is next to the search bar. Below the search bar, there is a提示: 'Enter search terms such as document numbers, vendors, and product information.' and a list of links: 'Go to: advanced search | my requisitions | my purchase orders | my invoices | my forms'.

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.

Summary

Document Actions ▾ History 🖨️ ?

Expand All | Collapse All

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.

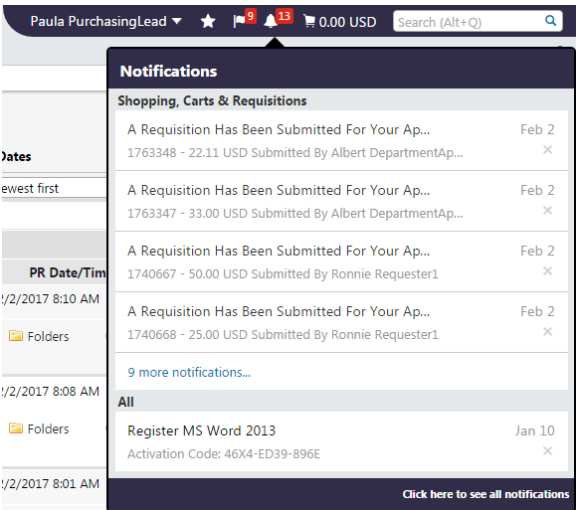
Approving a Requisition (Department Approver role)

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.

The screenshot shows a dashboard for 'Paula PurchasingLead'. It features a 'Dashboard Actions' dropdown and a 'View Another Dashboard' link. The main content area is divided into two sections: 'Action Items' and 'Document Search'.

Action Items section:

- Unassigned Approvals** (7 Requisitions)
- Contract** (2 Contracts eSignature Errors)

Document Search section:

- Search: All Documents (Document Number)
- Shortcuts**: My Requisitions, My Purchase Orders, My Invoices
- Approvals**: My Approvals, Approval Notifications, My Recent Approvals
- My Saved Searches**: all, Amanda's Contracts, Contracts - A, Contracts Re

Sourcing Event Search section:

- Search: Search by event name, number etc. (Advanced Search)

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

Sort by: Submit date newest first						
Hide requisition details expand all collapse all Results per folder: 20						
Purchasing Review SPC [7 results]						
Requisition No.	Vendors:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
1763348	GBK SERVICES	Not Assigned	2/2/2017 8:10 AM	Albert DepartmentApprover1	22.11 USD	Assign
Requisition Name: 2017-02-02 0206dappr1 02						
No. of line items: 1						
1763347	VWR INTL LLC	Not Assigned	2/2/2017 8:08 AM	Albert DepartmentApprover1	33.00 USD	Assign
Requisition Name: 2017-02-02 0206dappr1 01						
No. of line items: 1						
1741184	VWR INTL LLC	Not Assigned	2/2/2017 8:01 AM	Ronnie Requester1	492.74 USD	Assign
Requisition Name: 2017-01-05 0206dreq1 02						
No. of line items: 1						
1754628	BLUE BELL ENTERPRISES	Not Assigned	2/2/2017 7:59 AM	Albert DepartmentApprover1	211.00 USD	Assign
Requisition Name: 2017-01-24 0206dappr1 01						
No. of line items: 1						
1762151	MN IT SERVICES	Not Assigned	2/1/2017 11:09 AM	Albert DepartmentApprover1	52.22 USD	Assign
Requisition Name: 2017-02-01 0206dappr1 04						
No. of line items: 1						
1740668	HILLYARD	Not Assigned	1/5/2017 7:56 AM	Ronnie Requester1	25.00 USD	Assign
Requisition Name: 2017-01-04 0206dreq1 02						
No. of line items: 1						
1740667	AUTO VALUE	Not Assigned	1/5/2017 7:55 AM	Ronnie Requester1	50.00 USD	Assign
Requisition Name: 2017-01-04 0206dreq1 01						
No. of line items: 1						

REVIEWING THE REQUISITION

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

1 of 7 Results | Folder: Purchasing Review SPC

Requisition: 1763348
2017-02-02 0206dappr1 02

Status: Pending
Document Total: 22.11 USD

Requisition ▾

- Summary
- General (Prepared For)
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachm...
- External Notes and Attachm...
- Vendor Information
- Comments
- Attachment Overview
- PR Approvals
- PO Preview

Summary

Document Actions ▾ | History | ?

Expand All | Collapse All

▼ General (Prepared For)

Status: Pending
Submitted: 2/2/2017 8:10 AM
Cart Name: 2017-02-02 0206dappr1 02
Description: no value
Priority: Normal
Prepared by: Albert DepartmentApprover1
Requires Legal Review: ✗
Forced Encumbrance Requested: ✗
Forced Encumbrance Justification: no value
Secondary Purchasing Review Required?: ✗

Shipping

Billing

▼ Accounting Codes

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank
0206 St Paul CTC	149031 - 206 ISRS-STUDENT TECHNOLOGY FEE	no value	no value	2017 2017	T Treasury Account

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.

Requisition: 1763348
2017-02-02 0206dappr1 02

Status: Pending
Document Total: 22.11 USD

Requisition ▾

- Summary
- General (Prepared For)
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attach...
- External Notes and Attachm...

Internal Notes and Attachments

Internal Note
Internal Attachments
Add Attachments
QUOTE.docx (11k)

▼ Lines

G&K SERVICES
Detailed Edit...
G&K SERVICES, BOSTON - 001
199159 Any Street USA #, ST CLOUD, MN 56301 USA

Product Description

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

Comments
Document Actions History ?

Show comments for
Requisition
Add Comment

Records found: 1

Paula PurchasingLead
[Reply To] [New Comment]
[Remove]

Applies To: Requisition - 1763348
Comment Added - 2/2/2017 9:01 AM

Please fax the PO to 651-846-1111

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

Accounting Codes
Document Actions History ?

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year	Bank	edit
0206 St Paul CTC	149031 - 206 ISRS-STUDENT TECHNOLOGY FEE	no value	no value	2017 2017	T Treasury Account	

Object Code values vary by line

Lines
Selected Line Item Actions

G&K SERVICES

[Detailed Edit...](#)

G&K SERVICES, BOSTON - 001
199159 Any Street USA #, ST CLOUD, MN 56301 USA

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	Laundry Detailed Edit... Accounting Codes (same as header)		1/EA	22.11	1 EA	22.11 USD	edit

Object Code

values have been overridden for this line

Object	1810
Building Maintenance Services	

Vendor subtotal
22.11USD

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	22.11
Total	22.11 USD

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.

The screenshot shows the 'Accounting Codes' dialog box. At the top, there is a table with columns: RC_ID, Cost Center, Grant Nbr, Project Funding Nbr, Fiscal Year, and Bank. The data row shows: RC_ID: 0206, Cost Center: 149031 - 206, Grant Nbr: no value, Project Funding Nbr: no value, Fiscal Year: 2017, Bank: T. An 'edit' button is circled in red in the top right corner. Below the table is a form with the same columns. The 'Cost Center' field is highlighted with a blue border and contains the text '149031 - 206'. Below this field is a link that says 'Select from all values...'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

- **Object Code**

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

The screenshot shows the 'Object Code' dialog box. It has a single text field labeled 'Object' containing the value '1810'. Below the field is a link that says 'Select from all values...'. At the bottom are 'Save' and 'Cancel' buttons. In the background, there is a table with columns: Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The first row shows: Product Description: Laundry, Catalog No: 1, Size / Packaging: 1/EA, Unit Price: 22.11, Quantity: 1 EA, Ext. Price: 22.11 USD. An 'edit' button is circled in red in the bottom right corner of the main form.

- **Commodity Code**

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

Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
	1/EA	22.11	1 EA	22.11 USD	<input checked="" type="checkbox"/>

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

Selected Line Item Actions ▼

Change Vendor

Add to Favorites

Add To Active Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Change Commodity Code

Requires Sourcing

Remove Requires Sourcing

edit

Catalog No	Size / Packaging	Unit Price	Qu
	1/EA	22.11	1

Change Commodity Code ? X

Commodity Code

Save

Cancel

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

G&K SERVICES

Detailed Edit...

G&K SERVICES, BOSTON - 001

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

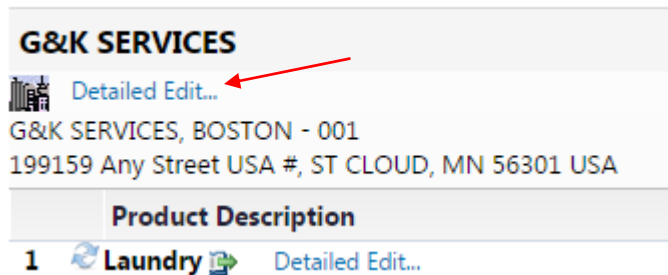
Product Description

1 Laundry Detailed Edit...

Accounting Codes (same as header)

- **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
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.

Product Description

1 **biology supplies** [Detailed Edit...](#)

Object Code values have been overridden for this line item

[Taxable](#)

Non Catalog Item

VWR INTL LLC [select different vendor](#)

Fulfillment Address VWR INTL LLC, PITTSBURGH - 001: (preferred)
06299 Another Street USA #
PITTSBURGH, PA 15264-0169
[select different fulfillment center](#)

☒ **Distribution Methods**
The system will distribute purchase orders using the method(s) indicated below:
☐ Check this box to customize order distribution information.
Fax +1 (919) 659-6100
Email (Plain Text) nobody@scquest.com
Email (HTML Body) nobody@scquest.com

Product Description	Catalog No.	Product Size	Quantity	Price Estimate	Packaging
biology supplies			1	33.00	EA - Each

238 characters remaining [expand](#) | [clear](#)

☒ **Product Details**
[Add Internal Attachments](#)

Taxable ☐
Capital Expense ☐
Commodity Code 42000000
Manufacturer Name
UNSPSC

☐ Controlled substance
☐ Recycled
☐ Hazardous material
☐ Radioactive
☐ Rad Minor
☐ Select Agent
☐ Toxin
☐ Energy Star
☐ Green

[Save](#) [Cancel](#)

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.

Accounting Codes

RC_ID	Cost Center	Grant Nbr	Project Funding Nbr	Fiscal Year
0206	149031 - 206	no value	no value	2017
St Paul CTC	ISRS-STUDENT TECHNOLOGY FEE	no value	no value	2017

Object Code values vary by line

Document Actions [History](#)

- Assign to myself**
- Approve/complete step & show next
- Approve/complete step
- Copy to New Cart
- Add Comment
- Add Notes to History
- Add Non-Catalog Item

- **Return to the Requisitioner**

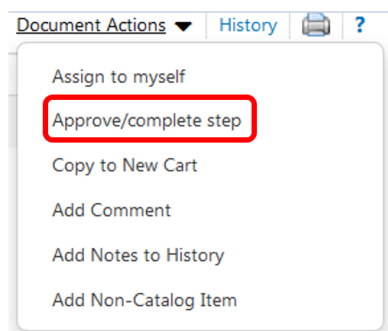
If a change needs to happen to a catalog order's line item, the only role that can make that change is the Requestor. In this case, you would select the **Return to the Requisitioner** option.

- **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.

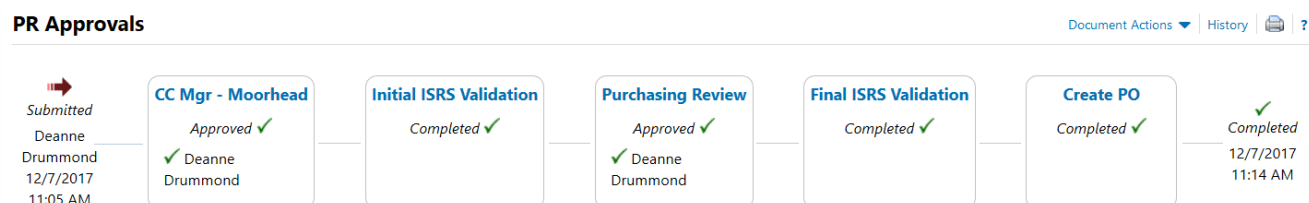
- **Final Requisition Approval**

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 determined 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.

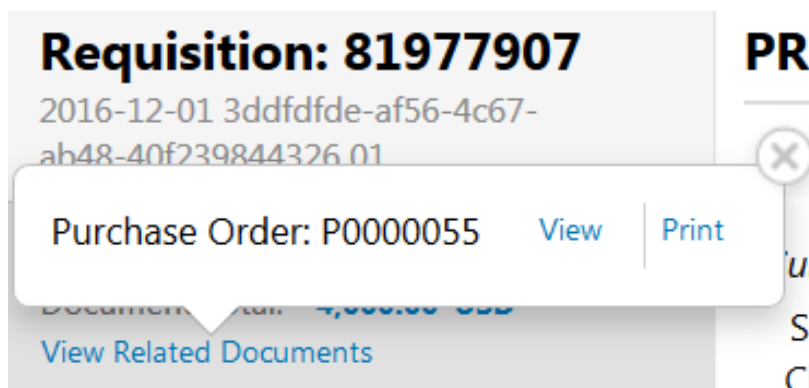
These additional steps will occur when the requisition includes any of the following:

- 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.

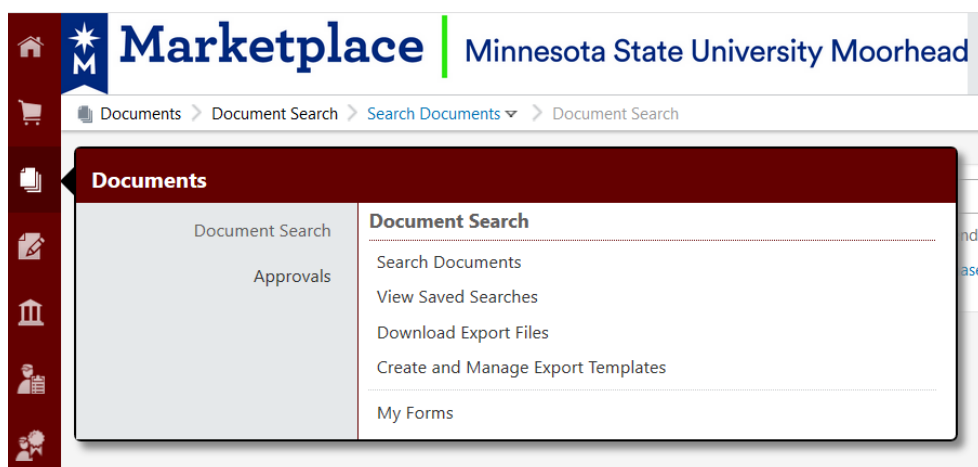
Two types of receiving:

- 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.

Showing **1 - 1** of 1 Results All Dates Create Quantity Receipt Go

Results Per Page 20 Sort by: Best match Page 1 of 1 ?

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	<input type="checkbox"/>

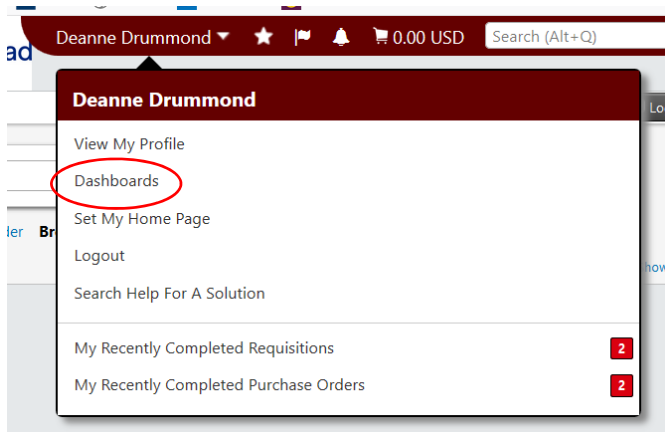
Method Two

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.

Showing 1 - 1 of 1 Results

All Dates




Create Quantity Receipt

Go

Results Per Page 20

Sort by: Best match

Page 1 of 1

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 orders

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**

Showing 1 - 1 of 1 Results All Dates Create Quantity Receipt Go

Results Per Page: 20 Sort by: Best match Page 1 of 1

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

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.

Marketplace | Minnesota State University Moorhead

Documents > Document Search > Search Documents > New Qty Receipt

Summary | Comments | History

Exact Match: PO No. P0019873

Receipt Name: 2018-02-01 5522:801-48e-40be-a882 Receipt Create Date: 2/1/2018 10:09:05 AM Source: Manual

To Be Assigned: 2/1/2018 Packing Slip No. Vendor Name: PROMOTIONAL SOLUTIONS Received by: Deanne Drummond (Minnesota State University Moorhead)

RECEIPT ADDRESS DELIVERY

Location: Attn: Deanne Drummond, Minnesota State University Moorhead, 188 MacLean Hall - Post Office, 1106 7th Ave S, Moorhead, Minnesota 56503, United States

Carrier: Other

Tracking No. Flexible Text Field Flexible Text Field 2 Flexible Drop Down

Attachments: Notes (1,000 Characters Max)

Receipt Lines

Line Details

PO No.	PO Line No.	Product Name	Catalog No.	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0019873	1	t-shirts for alumni basketball game			Invalid quantity		Received	Remove Line, Remove & Return

PO Institution: Minnesota State University Moorhead (0072)
Contract No.
Flex Field 2
Attachments
Notes

1000 characters remaining expand | clear

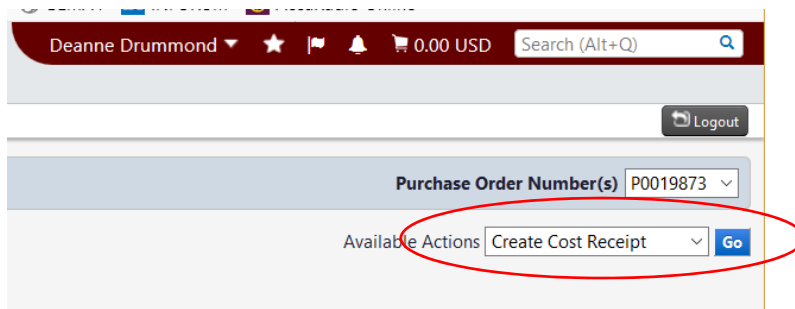
Buttons: Done, Add PO, Save Updates, Complete

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.

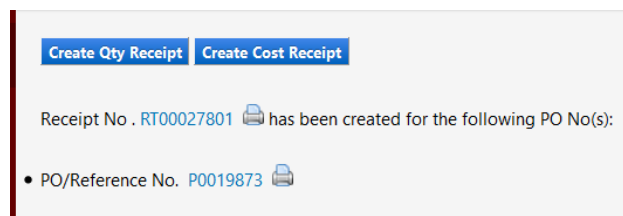
Find the Blanket Order's Purchase Order Number.

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**.



The screenshot shows a web application interface. At the top, there is a header bar with the user name 'Deanne Drummond', a star icon, a bell icon, a shopping cart icon with '0.00 USD', and a search bar with the text 'Search (Alt+Q)'. Below the header, there is a 'Logout' button. The main content area has a 'Purchase Order Number(s)' field with a dropdown arrow, showing 'P0019873'. Below this, there is an 'Available Actions' dropdown menu with 'Create Cost Receipt' selected. A red oval highlights the 'Available Actions' dropdown and the 'Go' button next to it.

- 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.



The screenshot shows a confirmation message. At the top, there are two buttons: 'Create Qty Receipt' and 'Create Cost Receipt'. Below the buttons, the text reads: 'Receipt No. RT00027801 has been created for the following PO No(s):'. Below this, there is a bullet point: '• PO/Reference No. P0019873'.

How to Attach a Scanned Packing Slip

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

The screenshot shows the 'Summary' tab of the Receiving screen. The 'Header Information' section includes fields for Receipt Name, Receipt Create Date, and Source. Below this is a table with columns: Receipt No, Receipt Date, Packing Slip No., Vendor Name, and Received by. The table contains one row with data: RT00027801, 2/1/2018, 123test, PROMOTIONAL SOLUTIONS, and Deanne Drummond (Minnesota State University Moorhead). Below the table are sections for RECEIPT ADDRESS, Carrier, and DELIVERY. The 'Attach/Link' button is circled in red.

Receipt No	Receipt Date	Packing Slip No.	Vendor Name	Received by
RT00027801	2/1/2018	123test	PROMOTIONAL SOLUTIONS	Deanne Drummond (Minnesota State University Moorhead)

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

The screenshot shows the 'Attachments - Google Chrome' window. The URL bar shows 'https://usertest.sciquest.com/apps/Router/Attachment?EntityId=187625&Entity1'. The window contains a warning message: 'Attachments are NOT checked for viruses. SciQuest stores attachments in a manner that protects its systems. Please ensure attachments are free from viruses before attaching them.' Below this is the 'Attachment Information' section. It has two main parts: 'Attach Documents' and 'URL or Link to Documents'. The 'Attach Documents' part has a 'File Name' field and a 'File' field with a 'Choose File' button circled in red. The 'URL or Link to Documents' part has a 'File/URL Name' field and a 'Link/URL' field. There are 'Attach Document' and 'Link Document/URL' buttons at the bottom.

Attachment Information

Attach Documents

File Name:

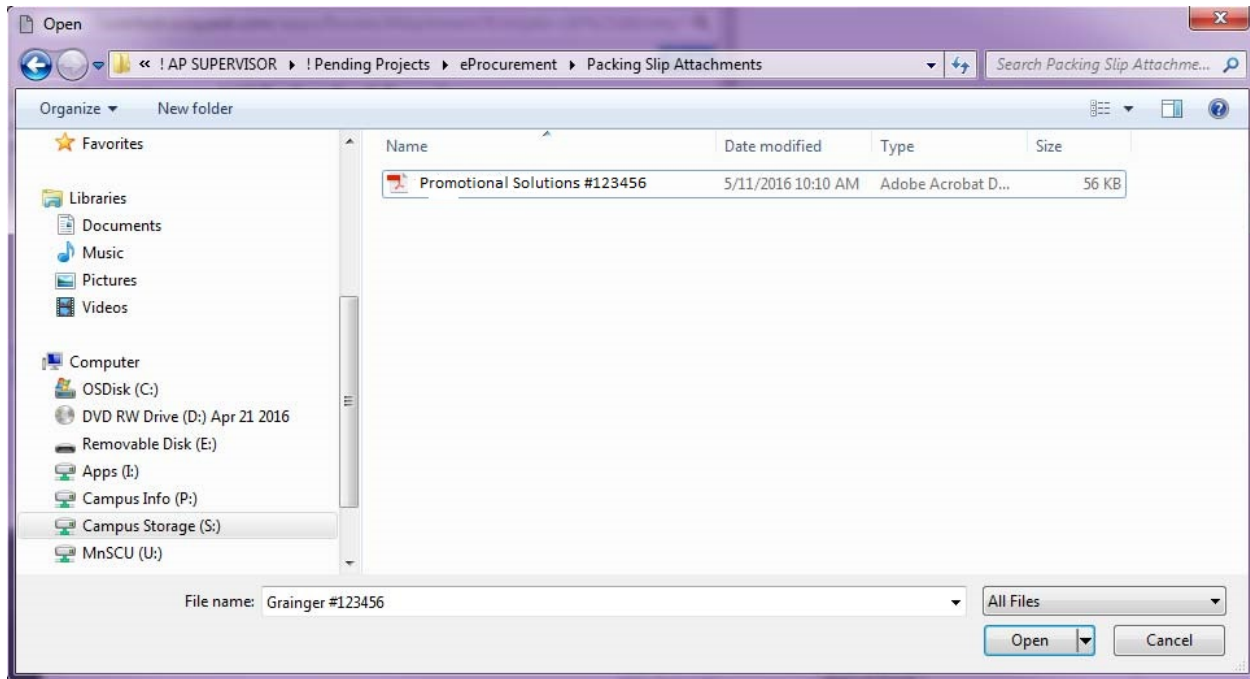
File: No file chosen

URL or Link to Documents

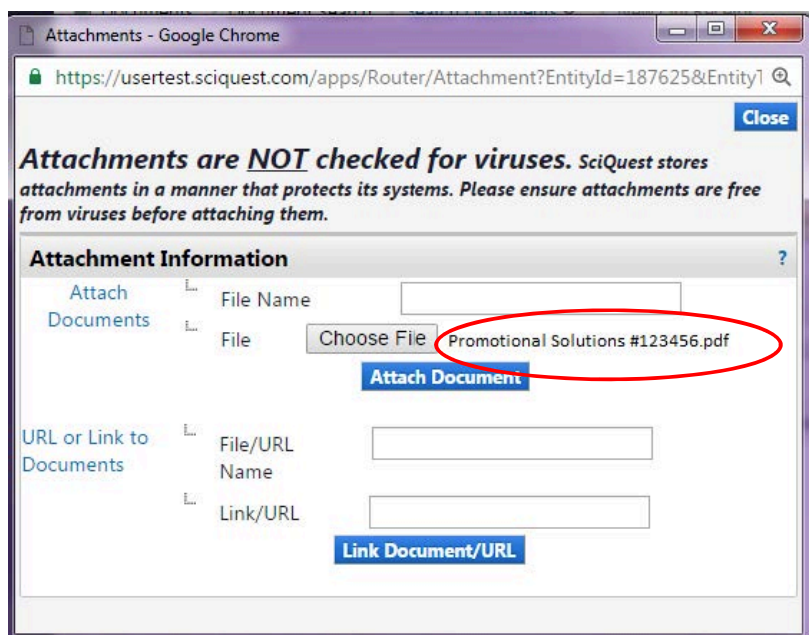
File/URL Name:

Link/URL:

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 screenshot shows a software interface for managing receipts. The top section, 'Header Information', contains fields for Receipt Name (2018-02-01 b522c8cf-48ce-40be-aa82-), Receipt Create Date (2/1/2018 10:17:58 AM), Source (Manual), Receipt No. (RT00027801), Receipt Date (2/1/2018), Packing Slip No. (122test), Vendor Name (PROMOTIONAL SOLUTIONS), and Received by (Deanna Drummond (Minnesota State University Moorhead)). Below this is the 'Receipt Address' section with fields for Location, Attn: Deanna Drummond, Minnesota State University Moorhead, 189 MacLean Hall - Post Office, 1104 7th Ave. S, Moorhead, Minnesota 56563, United States. The 'DELIVERY' section includes fields for Carrier, Tracking No., Flexible Text Field, Flexible Text Field 2, Flexible Drop Down, Attachments, and Notes. The bottom section, 'Receipt Lines', shows a table with columns for PO No., PO Line No., Product Name, Catalog No., Previous Receipts, Cost, Line Status, and Actions. The 'Complete' button is circled in red.

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**.

The screenshot shows the 'Marketplace' interface for Minnesota State University Moorhead. The sidebar on the left includes links for Home, Shop, Documents, Contracts, and Accounts Payable. The 'Documents' link is circled in red. The main content area shows a confirmation message: 'Receipt No. RT00027801 has been created for the following PO No(s): PO/Reference No. P0019873'.

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.

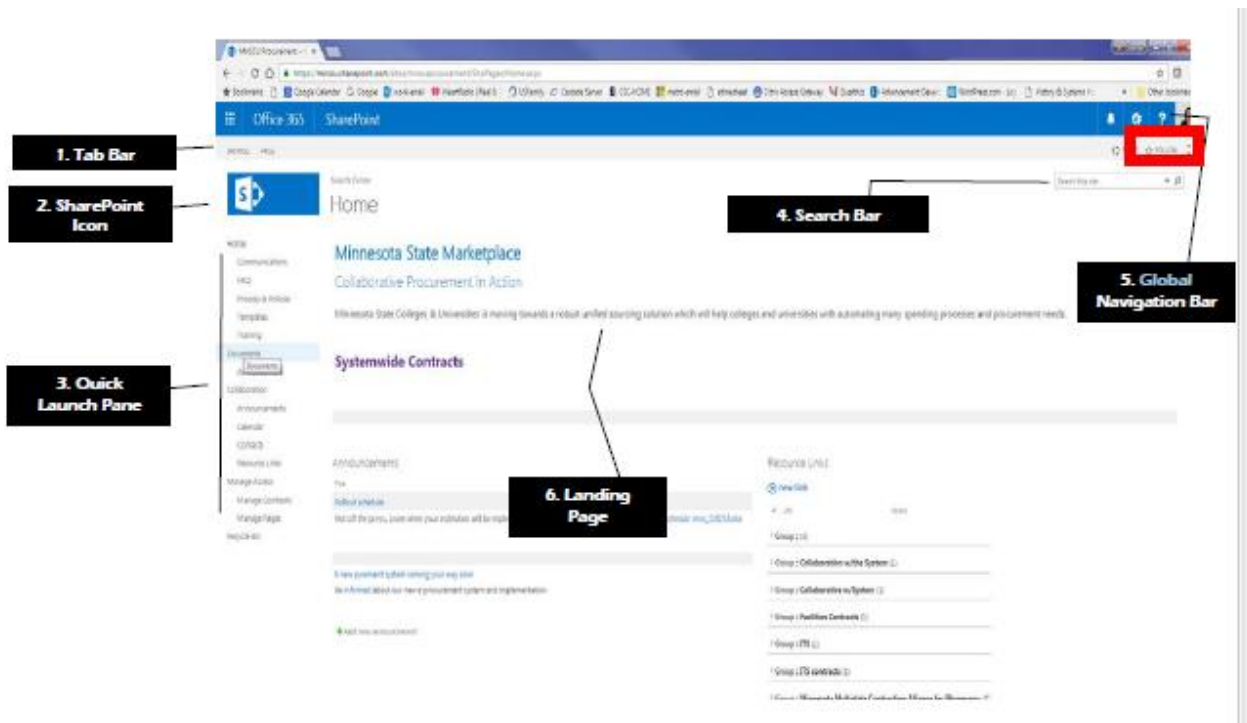
Login Instructions:

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

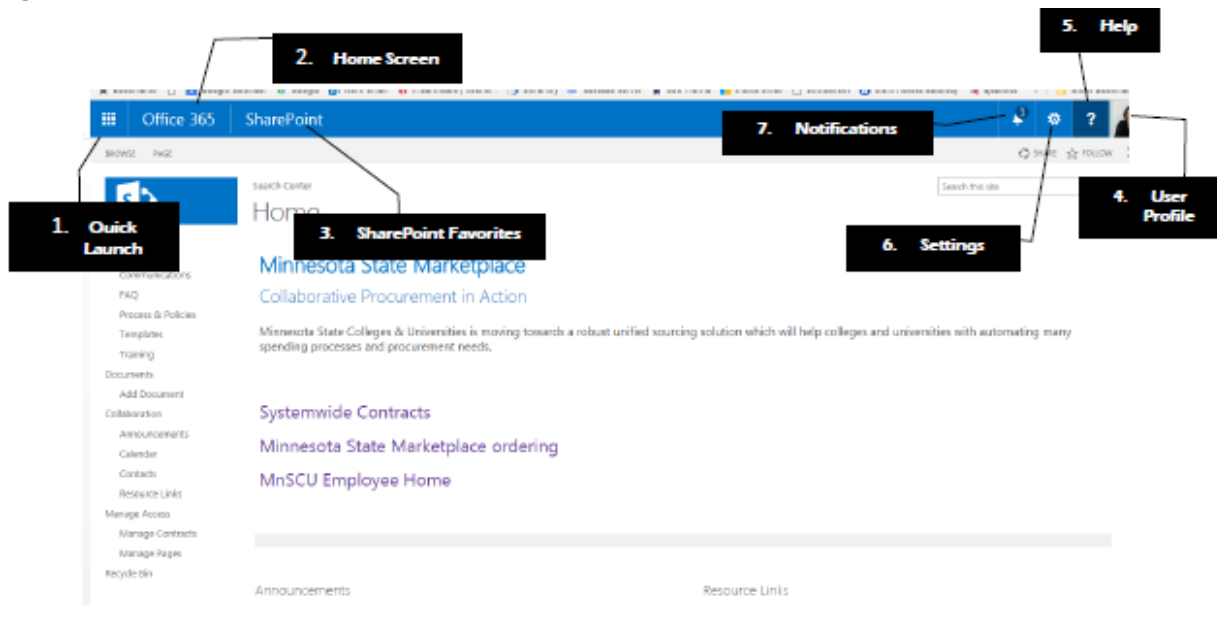


1. Tab Bar – allows the user to open the Ribbon Command
2. SharePoint Icon – returns you to the default home page.
3. Quick Launch Pane – contains shortcuts to common content on the site
4. Search Bar – allows you to search the site
5. Global Navigation Bar – contains shortcuts to major hub center of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

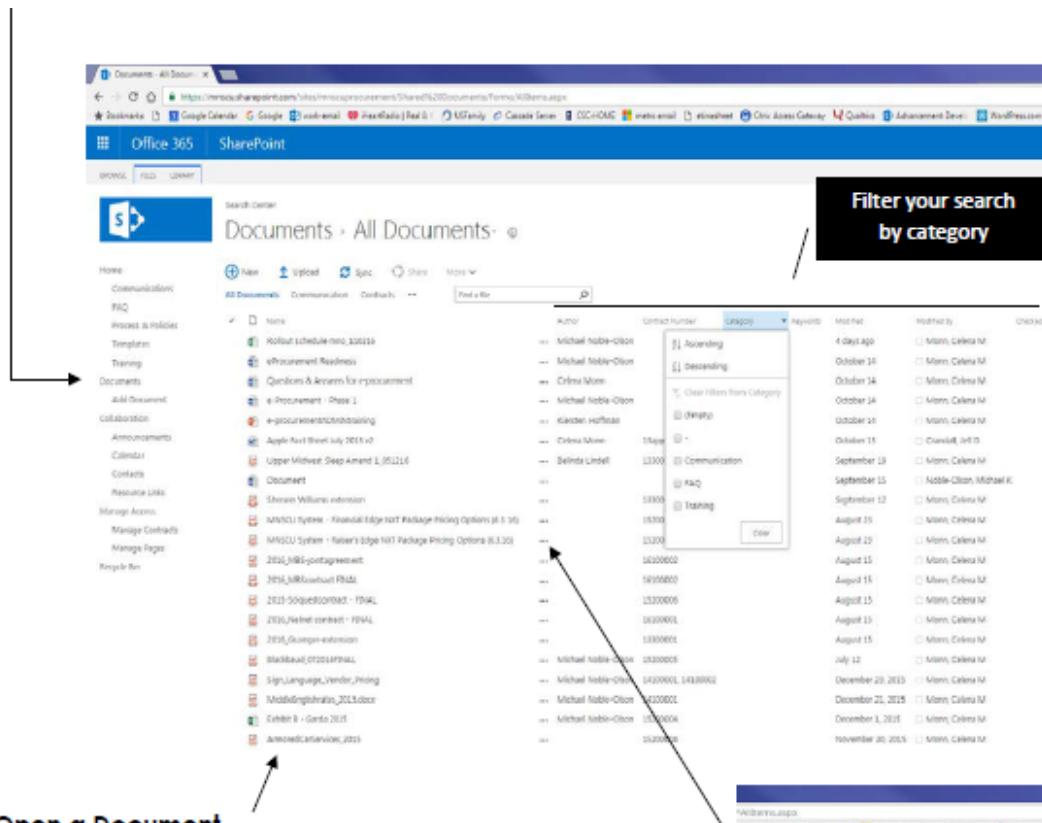
Using the Ribbon



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

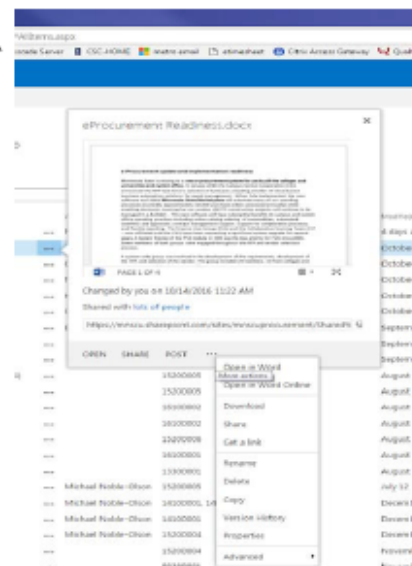
Depending on the document, you are able to open, edit, print, download, share, etc. within the site.

Other Menu items

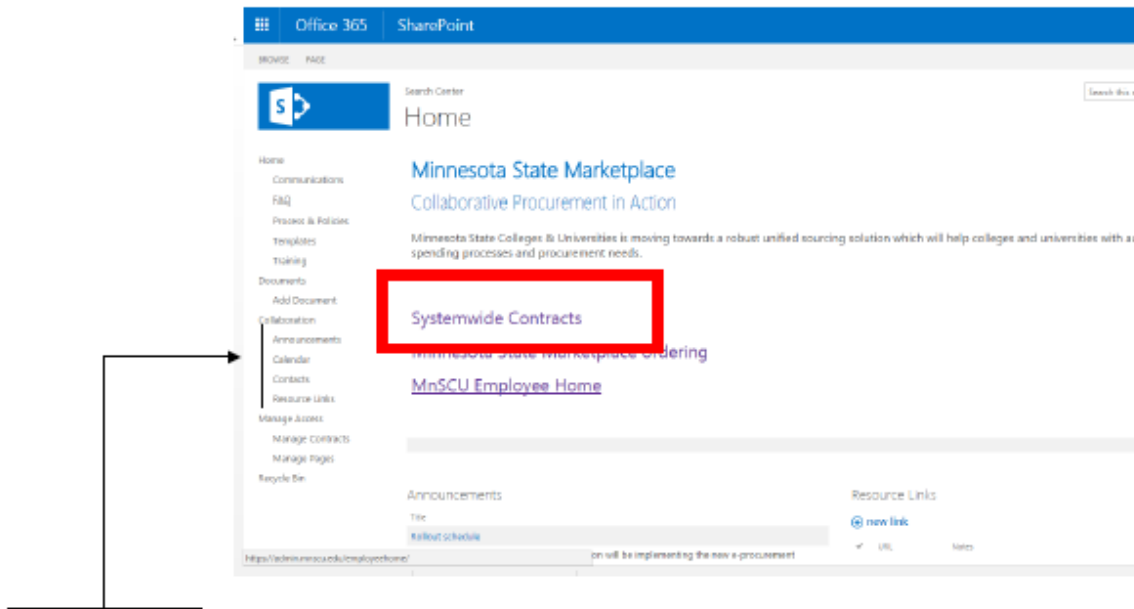
By clicking on the three "...", you bring up a menu box. This will allow you to open, share, copy, etc...

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

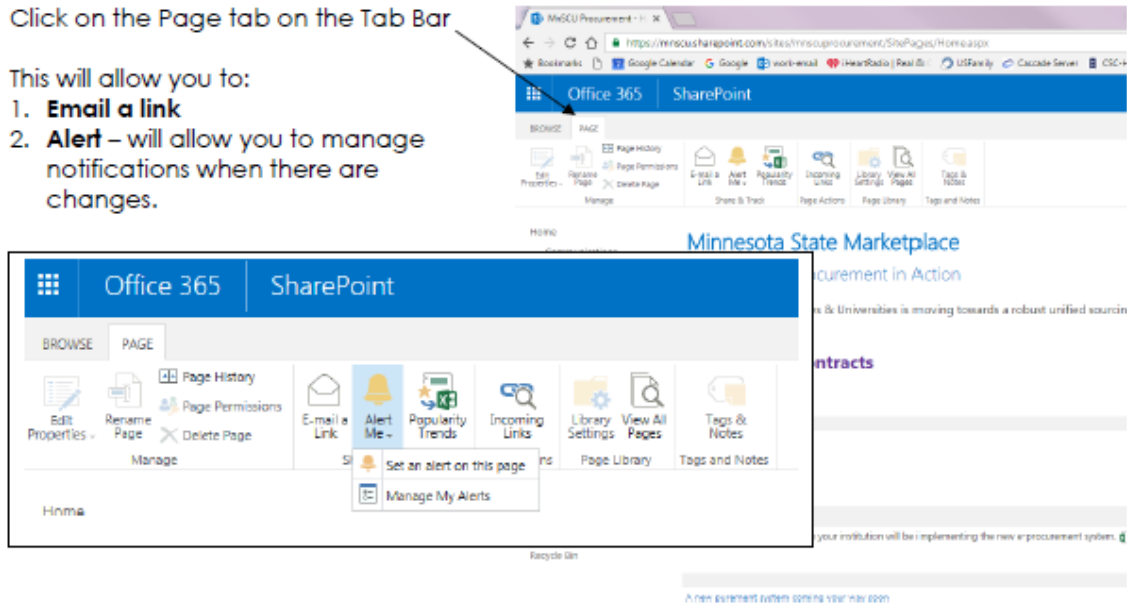
All Systemwide master contracts are posted on this site and will be maintained here until Minnesota State **Marketplace** is fully functional. Once **Marketplace** is fully functional, contracts and other links related to purchasing will be moved there for easy access. To view the list, simply click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

Other Features:

Click on the Page tab on the Tab Bar

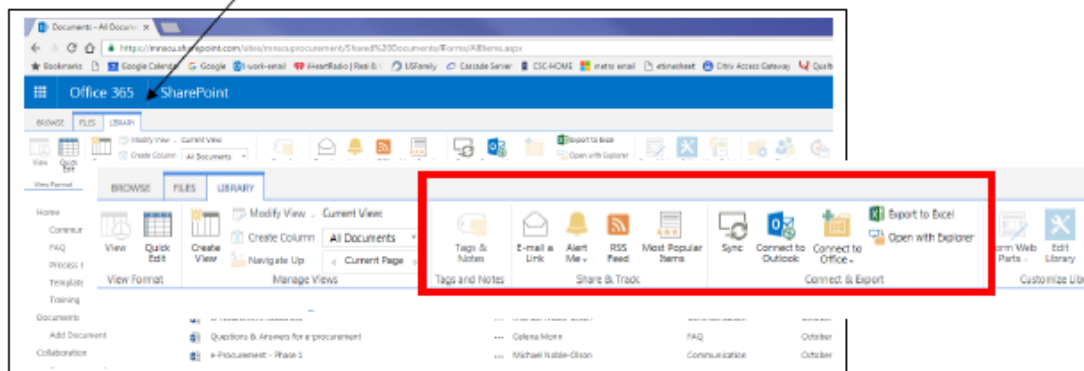
This will allow you to:

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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