SciQuest User Guide

Yale University eProcurement System

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Yale *Finance & Business Operations*

Table of Contents

Introduction

Overview

SciQuest is an electronic requisition tool that allows you to shop for items, place them in a shopping cart, review/edit details, and place your order.

When you place your order, a Purchase Requisition (PR) is created. This PR will be automatically routed through any approvals required (Financial approval, EHS approval). Once the PR is approved, Purchase Order(s) (PO) will be automatically generated and sent to the supplier(s)

1. Shop/Create Items
2. Add to Shopping Cart
3. Review Details
4. Place Order
5. Purchase Requisition (PR) is automatically created
6. PR is automatically routed for approval
7. PR is approved
8. Purchase Order(s) (PO) are automatically created and sent to the supplier(s)

Log-in

1. Go to: http://yalebiz.yale.edu/transactions/sciquest
2. Click the launch SciQuest button
3. This will display the Yale CAS login screen. The screen can be saved as a bookmark or favorite in your browser. Use your netid and password to login.

Help

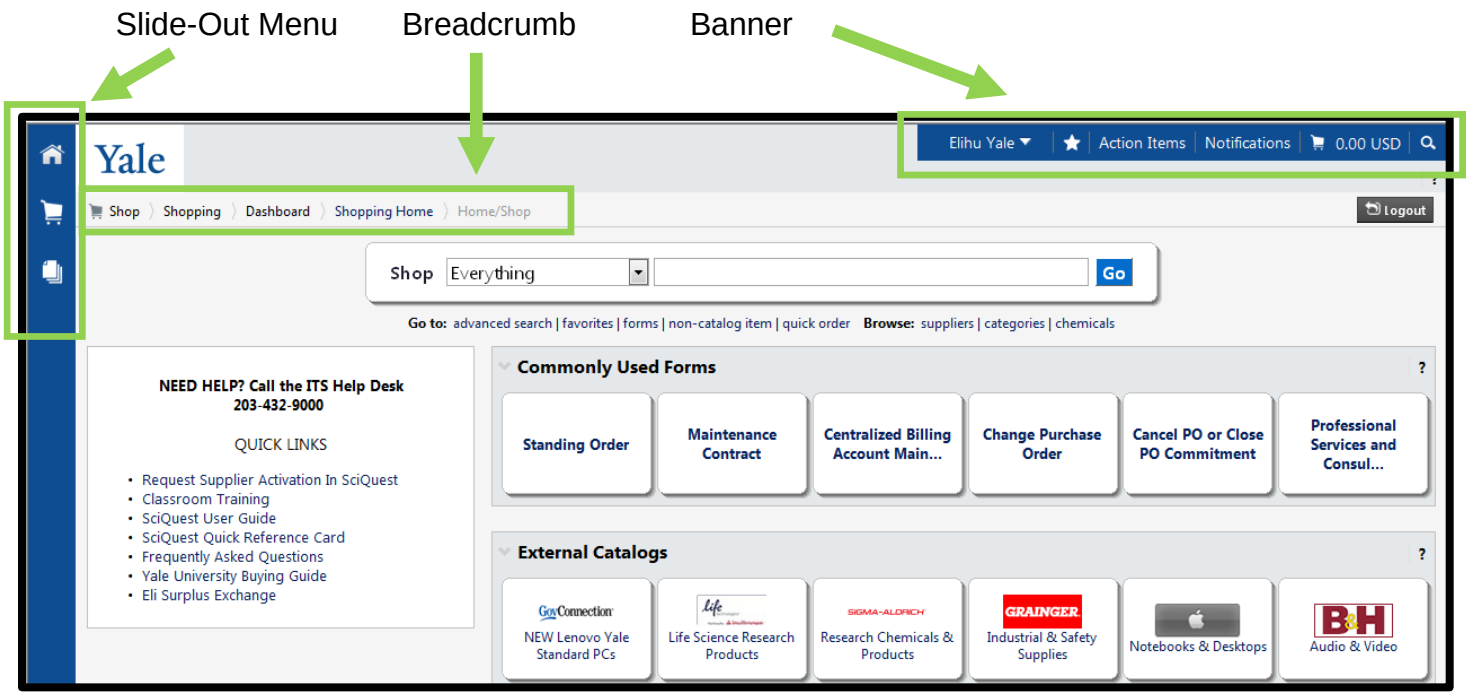
The ITS Help Desk is experienced with SciQuest and is ready to assist you.

Please direct all inquiries to 203.432.9000 or helpdesk@yale.edu.

Navigation

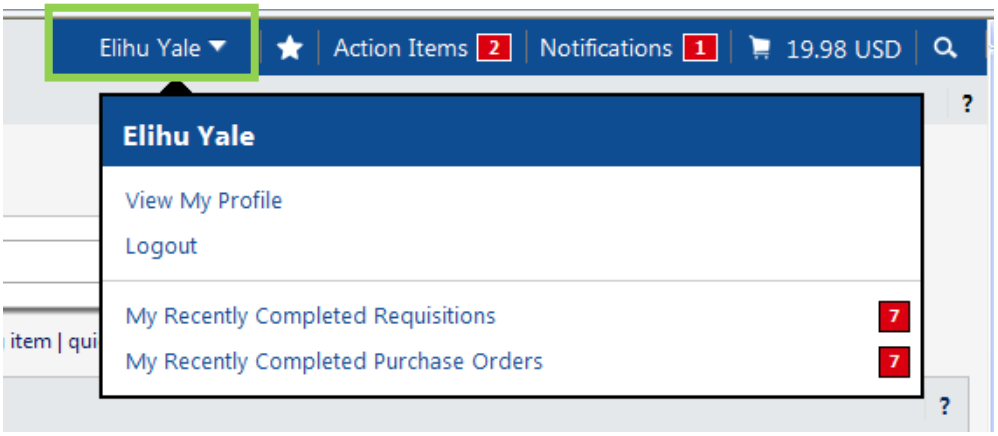
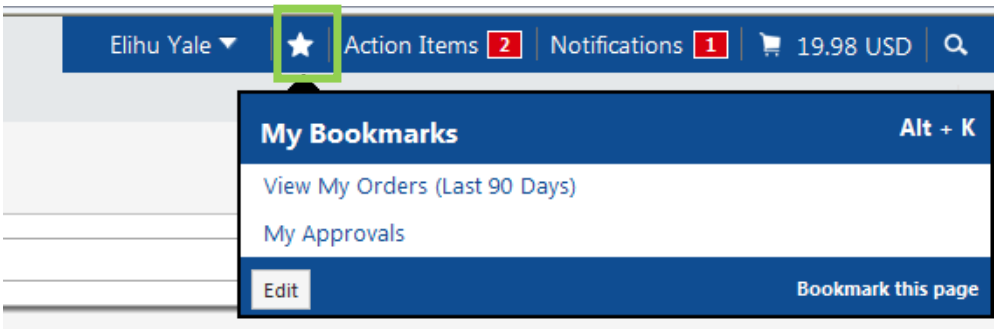
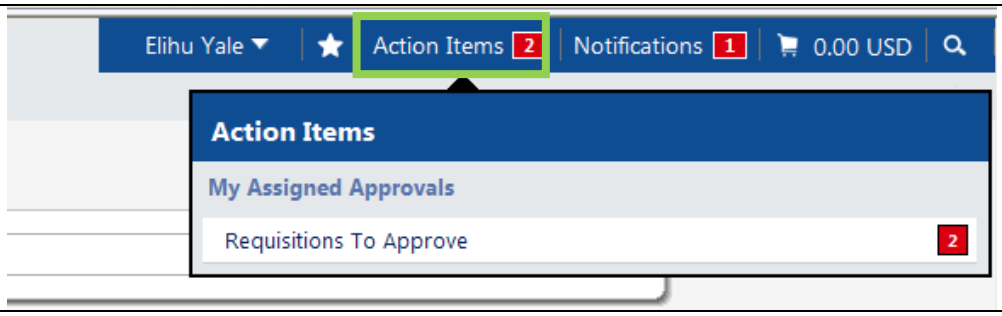
Overview

There are three sections which will always be accessible on the screen as you perform your tasks. The sections are named:



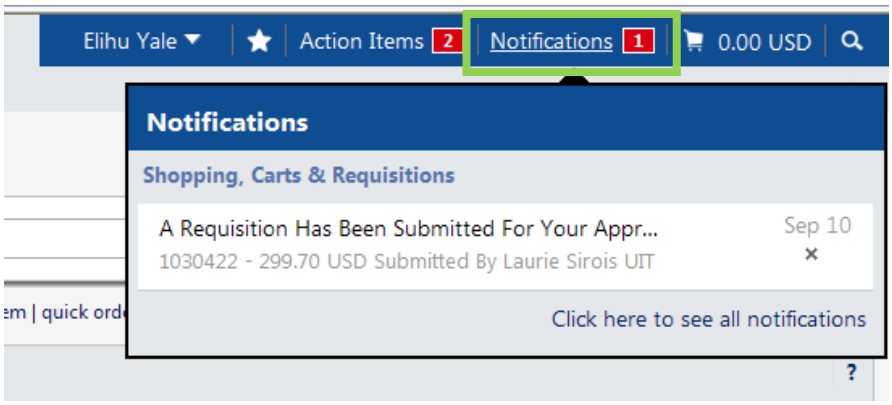
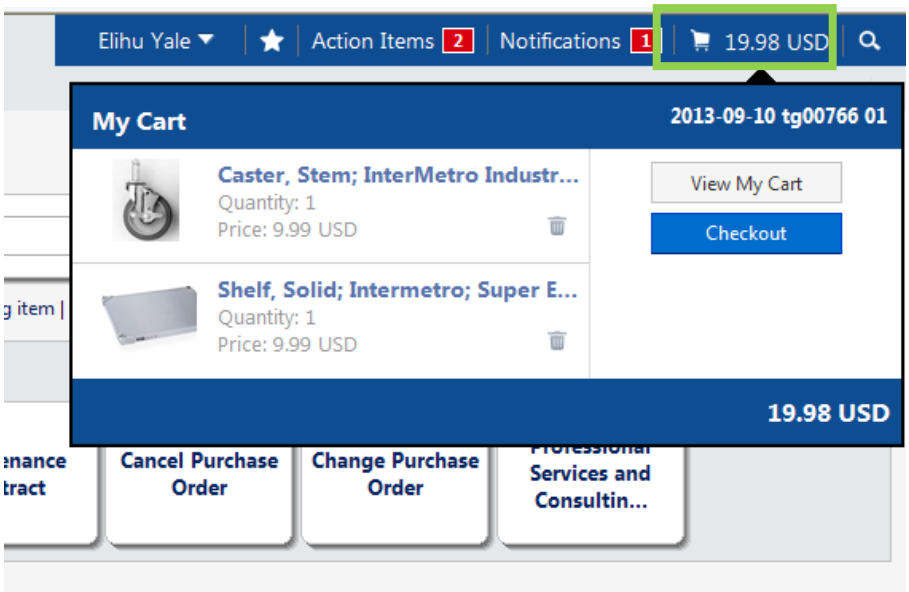
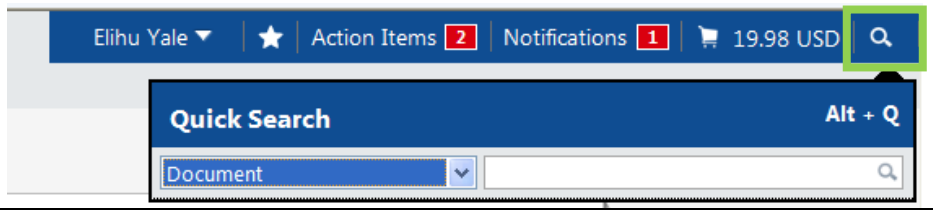
Navigation

Banner

Click **your name** in the banner to display the View My Profile and Logout links.	
Click the **star icon** in the banner to access the Bookmarks function. • You can move directly to a SciQuest page by clicking the selected bookmark. • You can add the current SciQuest page to 'My Bookmarks' by clicking 'Bookmark this page.'	
Click on **Action Items** to display your approvals	

Navigation

Banner

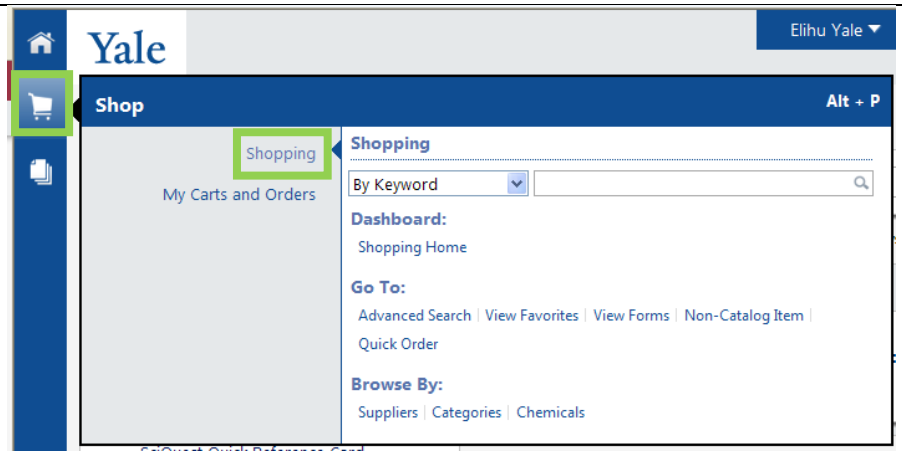
Notifications are available in the top banner and/or via email. In your profile, you can designate how and when you receive notifications- in the SciQuest banner, via email or both.	
Click on the **shopping cart icon** to preview the active shopping cart. • The 'View My Cart' button takes you to the active shopping cart. • The 'Checkout' button takes you to the final review screen.	
Click the **magnifying glass icon** to access Quick Search.	

Slide-Out Menu

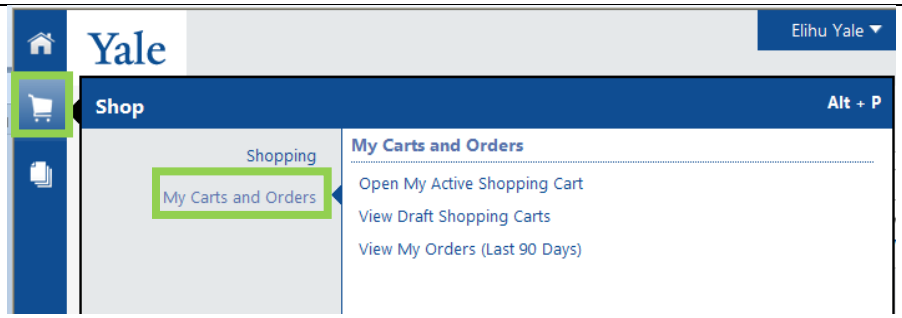
Navigate via a slide-out menu. Menu items are hidden until they are needed. The current page remains active until you select a menu item.

Shop

- Shopping
  - product search
  - favorites
  - forms
  - non-catalog item
  - browse by supplier

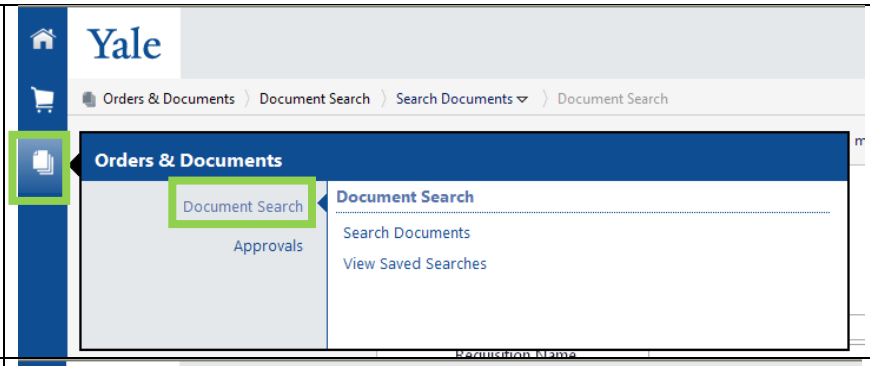


- My Carts and Orders
  - manage shopping carts
  - view recent orders

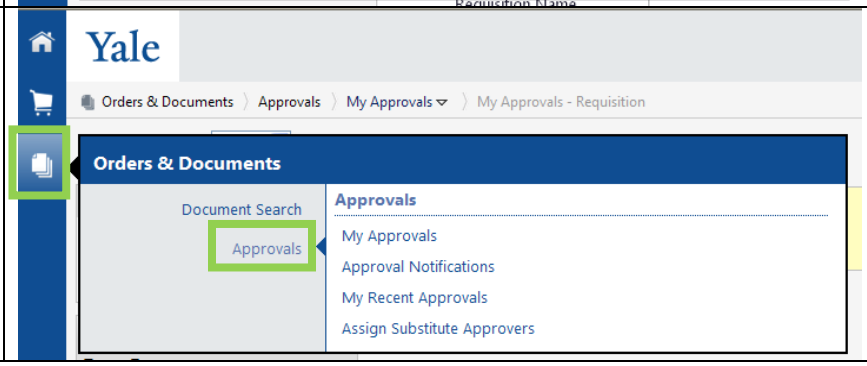


Orders & Documents

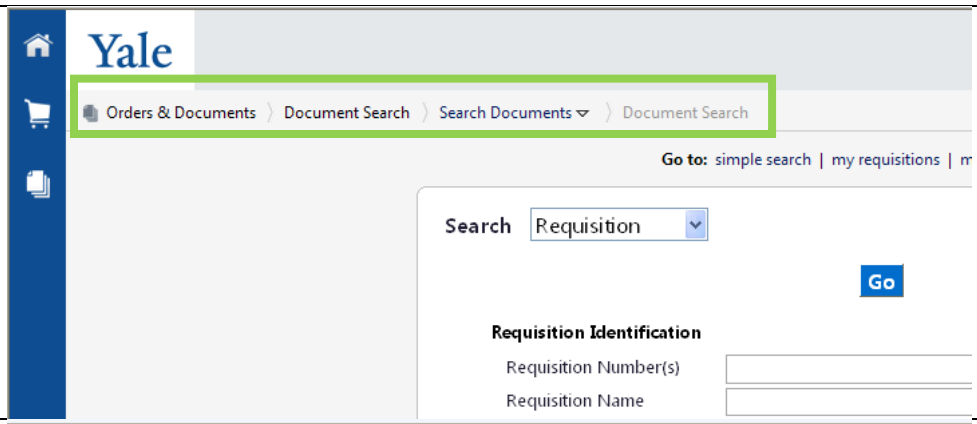
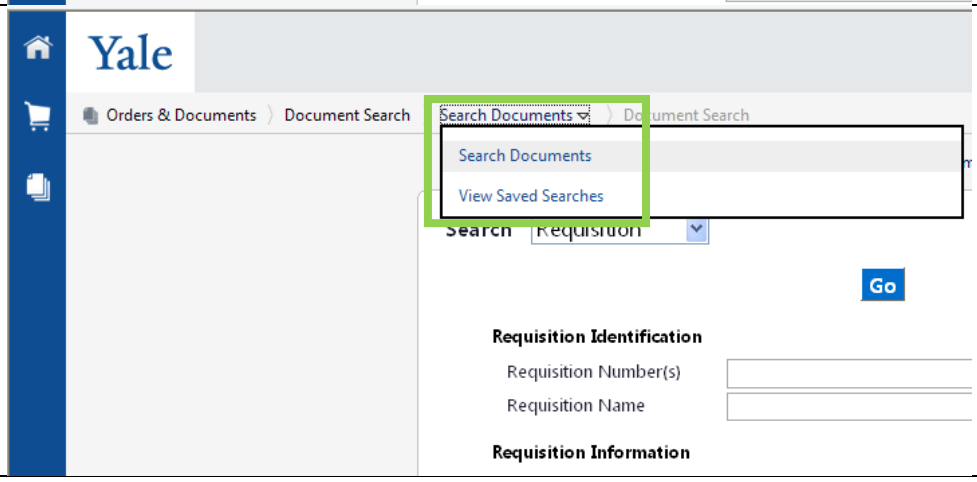
- Document Search
  - Search for requisitions and purchase orders



- Approvals
  - Manage approvals
  - Manage substitute approvers



Breadcrumb

As you navigate through SciQuest, the 'breadcrumb' will be displayed at the top of the screen.	
You can click to view and navigate to other locations.	

SciQuest Roles

Requisitioner: This role is assigned to people who will be **generating** orders.

- Orders generated less than the assigned self-approval dollar limit will go directly to the supplier without review and approval by another person.
- Orders generated greater than the assigned self-approval dollar limit will be routed to a financial approver.

Approver: This role is assigned to people who will be **approving other people's orders**.

- All approvers can approve all orders. Upon approval, orders greater than the financial approval dollar limit will be automatically routed to the person's default financial approver.
- Approvers have a $0 self-approval limit. If approvers will also be generating orders, a Requisitioner role should be also assigned.

To view your current role(s) assigned by your Business Office.

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **User Roles & Access Settings (view only)** in the navigation sidebar
4. Click **Assigned Roles**. Assigned role(s) are displayed.

User Settings

To update your name, phone number or email address

1. Click **your name** in the banner
2. Click **View My Profile**
3. Make necessary change(s)
4. Click **Save**

Fax Number

This fax number is frequently used by suppliers for order acknowledgements and is required to place an order in SciQuest.

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Charging Instructions, Initiator, Fax Number**
5. Click **Fax No.** tab
6. Click **Edit** button
7. Click **Add New Value** button
8. Enter fax number in Value field. Description field is optional.
9. Click Default **checkbox**
10. Click **Save** button
11. Click **Close** button

Profile Management

Initiators

Multiple Initiators can be stored here. Values stored here will be available in a drop down list during checkout. If specified, your default will appear in bold and will automatically populate your shopping cart.

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Charging Instructions, Initiator, Fax Number**
5. Initiated by tab is displayed
6. Click **Edit** button
7. Click **Add New Value** button
8. Enter search criteria; Value= Net Id, Description= last name, first name, or Org value, or department name
9. Click **Search** button
10. Click **Select** check box
11. Click **Add Values** button
12. Click **Close** button

Financial Approvers

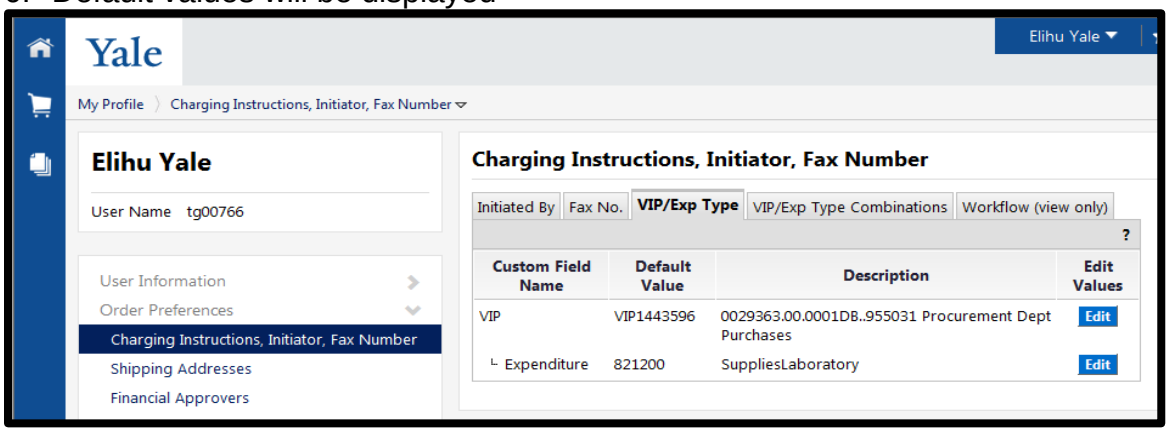
Multiple Financial Approvers can be stored here. Values stored here will be available in a drop down list during checkout. If specified, your default will appear in bold and will automatically populate your shopping cart.

1. Click **your name** in the banner.
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Financial Approvers**

Profile Management

Charging Instructions: Add / Remove VIP / Expenditure Type

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Charging Instructions, Initiator, Fax Number**
5. Click the **VIP/Exp Type** tab
6. Default values will be displayed



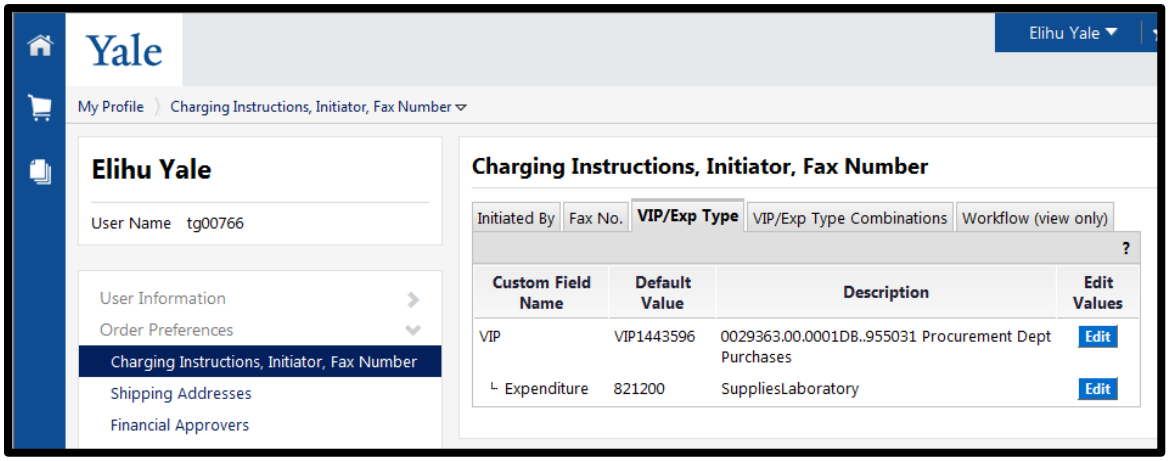
a. Add VIP
   i. Click **Edit** button on the VIP line
   ii. Click **Add New Value** button
   iii. Enter search criteria in Search For Value box
      1. Value=VIP number - OR -
      2. Description= Search by any segment of the PTAO, such as the Org number, or by the Description such as the department name or grant name.
   iv. Click **Search** button
   v. Select check box next to desired VIP
   vi. Click **Add Values** button
   vii. Click **Close** button

b. Add Expenditure type
   i. Click **Edit** button on the Expenditure line
   ii. Click **Add New Value** button
   iii. Enter search criteria in Search For Value box:
      1. Value=Expenditure number - OR -
      2. Description=Expenditure description
   iv. Click **Search** button
   v. Select check box next to desired Expenditure
   vi. Click **Add Values** button
   vii. Click **Close** button

c. Remove VIP or Expenditure
   i. Click **Edit** button on the VIP or Expenditure line
   ii. Click on the desired VIP or Expenditure list on the left side
   iii. Edit Existing Value box will open
   iv. Click **Remove** button
   v. Click **Close** Button

Charging Instructions: Manage Defaults

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Charging Instructions, Initiator, Fax Number**
5. Click the **VIP/Exp Type** tab
6. Default values will be displayed



a. Save or Remove Default VIP. Default values will be indicated in bold.
   i. Click **Edit** button on the VIP line
   ii. Click on the desired VIP from the list on the left.
   iii. The Edit Existing Value box will display
      - **Check** the Default box to **save** a default
      - **Uncheck** the Default box to **remove** a default
   iv. Click **Save** button
   v. Click **Close** button

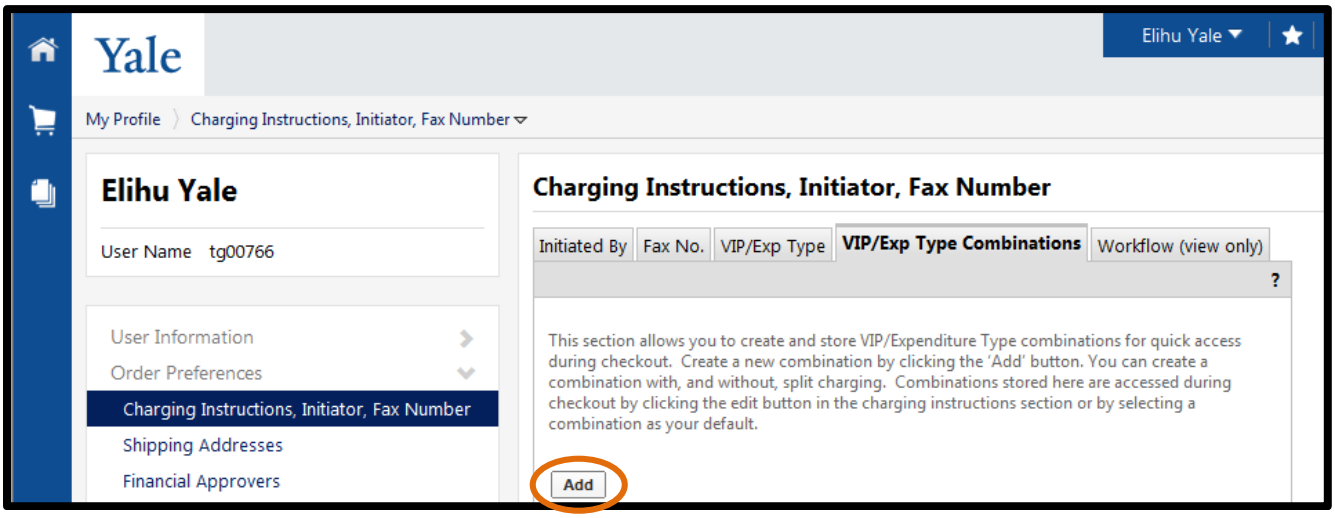
b. Save or Remove Default Expenditure Type. Default values will be indicated in bold.
   i. Click **Edit** button on the Expenditure line
   ii. Choose the VIP from the drop down list on the left (if more than one VIP has been stored).
   iii. Click on the desired expenditure type
   iv. The Edit Existing Value box will display
      - **Check** the Default box to **save** a default
      - **Uncheck** the Default box to **remove** a default
   v. Click **Save** button
   vi. Click **Close** button

Charging Instructions: VIP/Expenditure Type Combinations

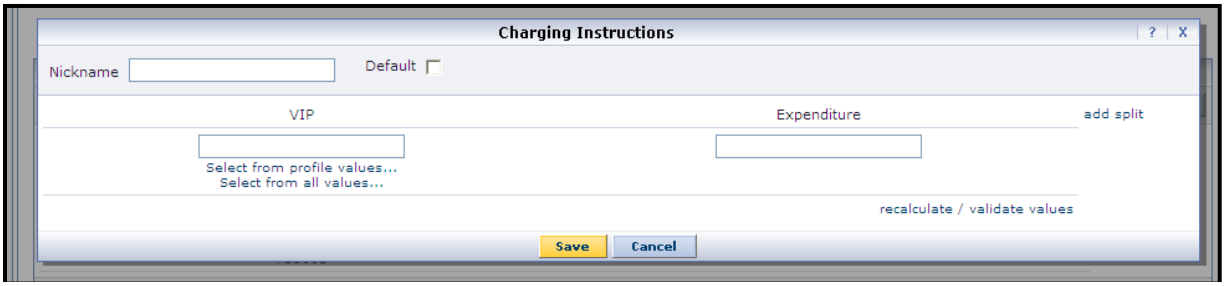
Store and manage your frequently used VIP and Expenditure type combinations, including split charging, for easy access during checkout.

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Charging Instructions, Initiator, Fax Number**
5. Click the **VIP/Exp Type Combinations** tab

To create and store a combination, click the **Add** button.



A pop-up will open. Here you will pick a Nickname for this combination and select the VIP(s) and Expenditure Type(s). To create split charging simply click the **add split** button as many times as needed and choose your values. You can also designate this as your default. Click the **Save** button when finished.



Profile Management

Shipping Addresses

Multiple Shipping Addresses can be stored and will be available in a drop down list during checkout. Make sure you have at least two addresses: one traditional receiving address that serves your location, and a Yale Direct ("desktop") address which is the street address for your personal office, lab or business office. The Yale Direct street addresses are prefaced with a 'YD' in the ship to location drop down list.

1. Click **your name** in the banner
2. Click **View My Profile**
3. Click **Order Preferences** in the navigation sidebar
4. Click **Shipping Addresses**
    a. Add a Shipping Address
        i. Click **Select Addresses for Profile** button
        ii. Scroll through the address drop down list and select the address. Specific street addresses are prefaced with 'YD' (Yale Direct).
        iii. Nickname: You can store this address with a different description for ease of use.
        iv. Deliver To Dept: Update this with the name of your specific department
        v. Delivery to Building/Room #: Update this field. This information will show on supplier shipment labels and packing lists.
        vi. Attention: If this package is being shipped to someone else, enter the name of the recipient.
        vii. Click **Save** button
    b. Set a Default Shipping Address. This default will auto populate your shopping cart at checkout. The default will be displayed in bold.
        i. Click on the desired address from the Shipping Addresses box on the left. The Edit Selected Address will display
        ii. Check the **Default box**
        iii. Click **Save** button
    c. Remove a Shipping Address
        i. Click on the desired address from the Shipping Addresses box on the left. The Edit Selected Address will display
        ii. Click **Delete Address** button

Profile Management

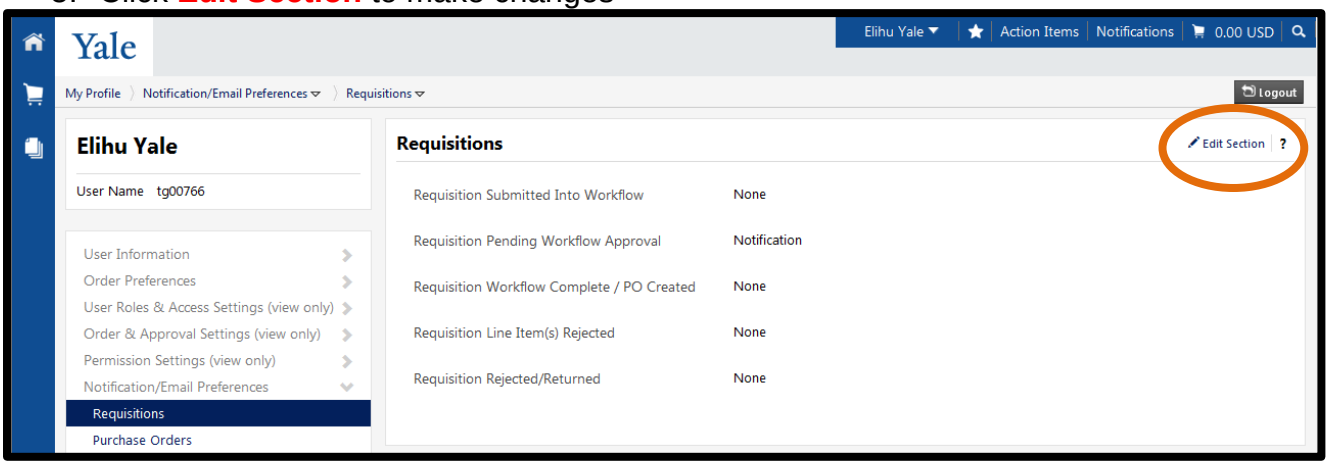
Notifications/Email Preferences

For each system generated notification/email message, you have the ability to choose the way you want to receive the information. The options are:

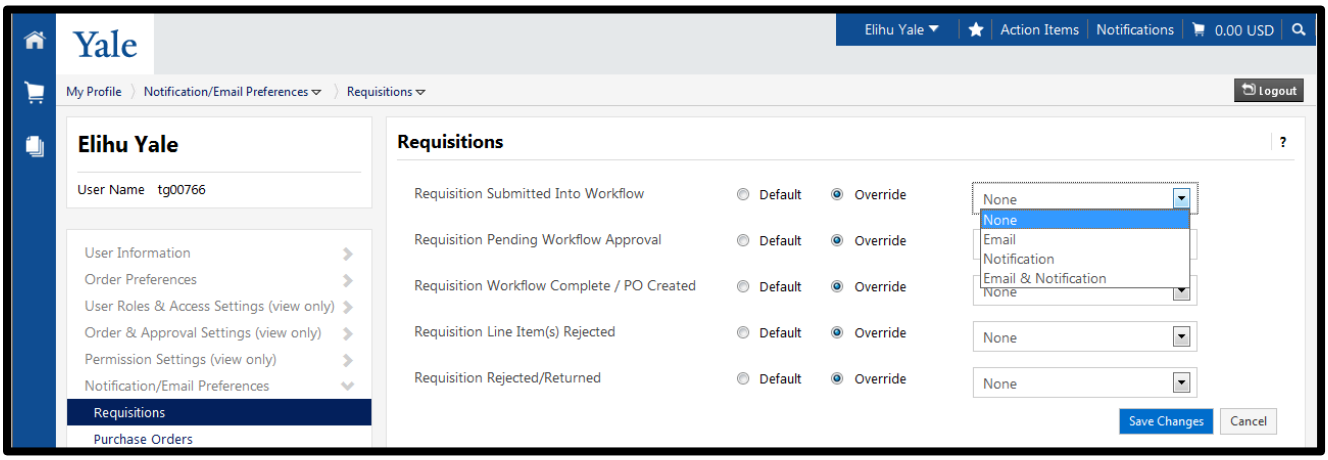
- None: no message is sent
- Email: message is sent to the email address stored in your SciQuest profile
- Notification: message is available under Notifications in the SciQuest banner
- Email & Notification: message is sent via email AND displayed under Notifications in the SciQuest Banner

To access your notification/email preferences:

1. Click **your name** in the banner.
2. Click **View My Profile**
3. Click **Notification/Email Preferences** in the navigation sidebar
4. Click either **Requisitions** or **Purchase Orders**
5. Click **Edit Section** to make changes



In Edit Mode, you can choose the system default, or override the default with your choice from the drop down list.



Click **Save Changes** when complete

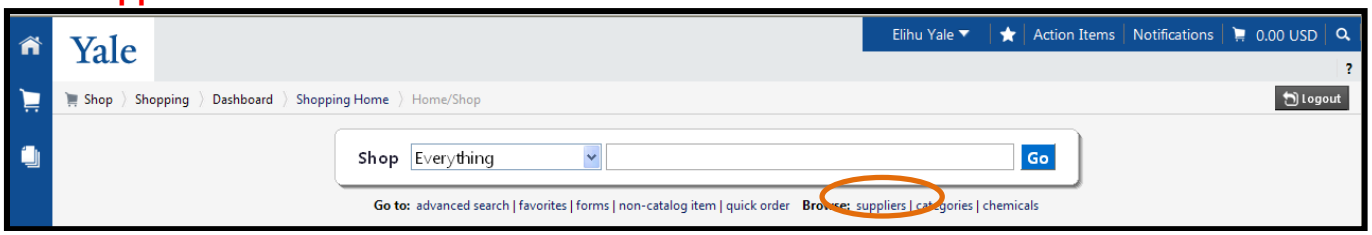
Suppliers

Supplier Types

- **Hosted Catalog** – These suppliers have searchable catalogs in SciQuest. Most catalogs are for Contract Suppliers who offer special pricing and customer service. Their pricing is audited to confirm the pricing posted includes the centrally negotiated discount. The remaining catalogs are Science catalogs for non-contract suppliers who charge list price. These catalogs are offered as a convenience and resource for product searching.
- **External Catalog or "PunchOut"** – These suppliers are contract suppliers and provide a direct link in SciQuest to their website where products can be chosen and brought back into your SciQuest shopping cart. These products are NOT included in product search.
- **Non-Catalog** – These suppliers are active in SciQuest, but do not offer a product catalog. Orders are created by entering the product or service specific information into the Non-Catalog item.

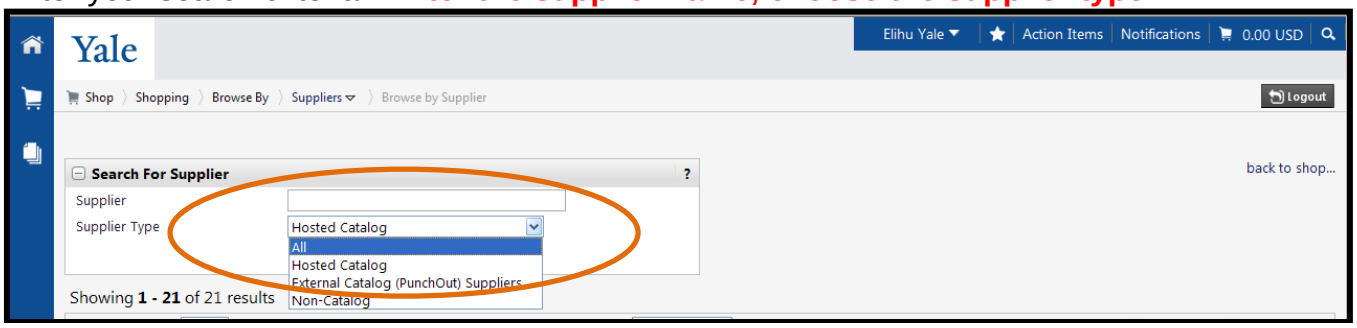
Browse/Search Suppliers

1. On the home page
2. Click **suppliers** link



3. **Click to expand Search for Supplier Filter**

4. Enter your search criteria: **Enter the supplier name, choose the supplier type**



Shopping

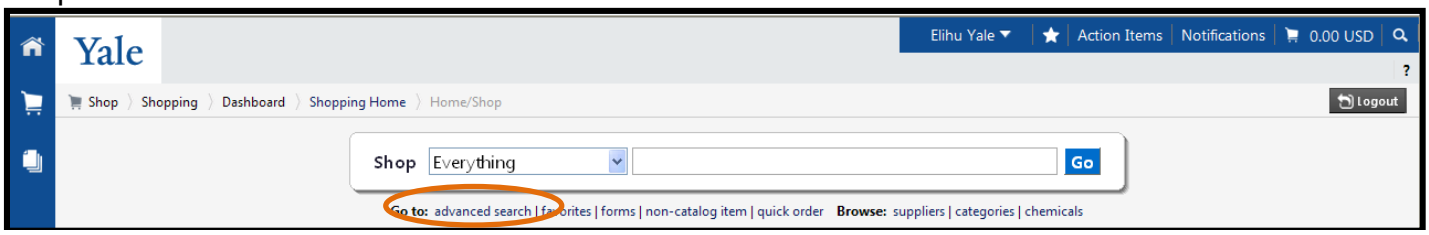
Items can be added to your shopping cart in a variety of ways:

- Hosted Catalog: Supplier product catalogs are loaded, maintained, and searchable within SciQuest.
- External Catalog (PunchOut): A link to a supplier's website where you can search and choose items which are brought back into your SciQuest shopping cart.
- Non-Catalog Item: The non-catalog item popup window is a free form entry screen where you can create an item not found in a catalog. This can be used for any product or service not found in a catalog, or when you receive a special price quote from a supplier.
- Forms: Forms have been created for ease of use in creating a Standing Order and Equipment Maintenance Contracts.

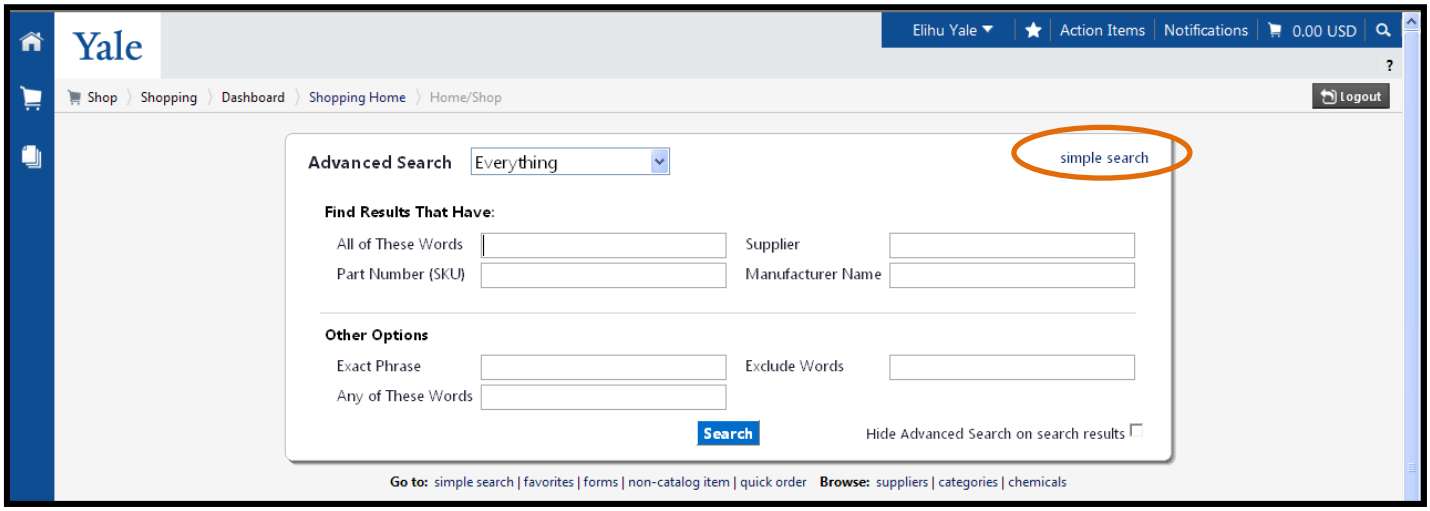
Hosted Catalog Product Search

Hosted catalog product search is accessed from the home page. It provides various options to perform simple searches, or a more advanced search using additional search criteria. You can toggle back and forth between simple search and advanced search by clicking the link appropriate link as shown below.

Simple Search:



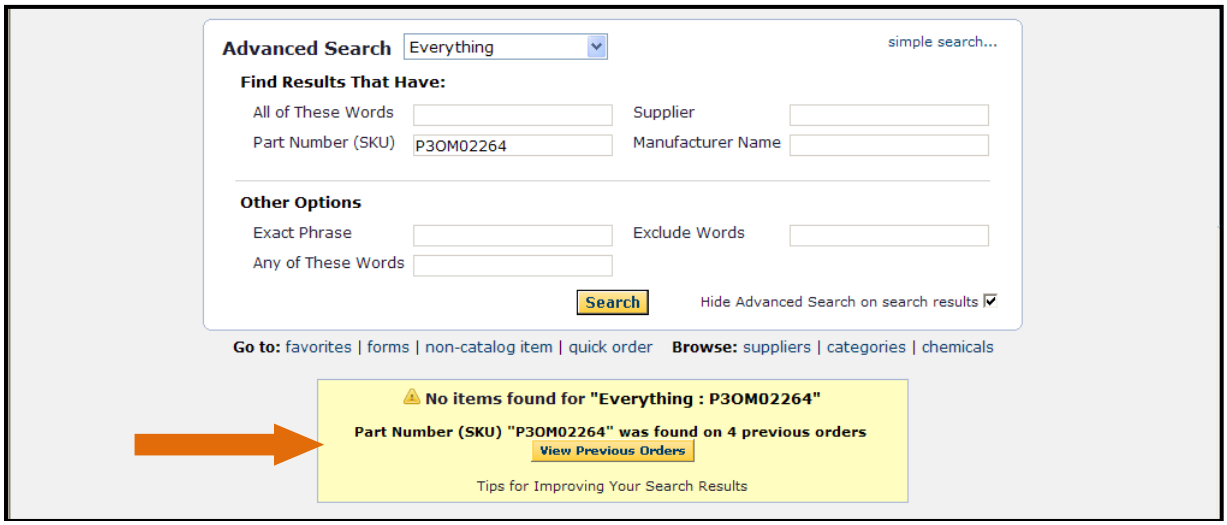
Advanced Search:



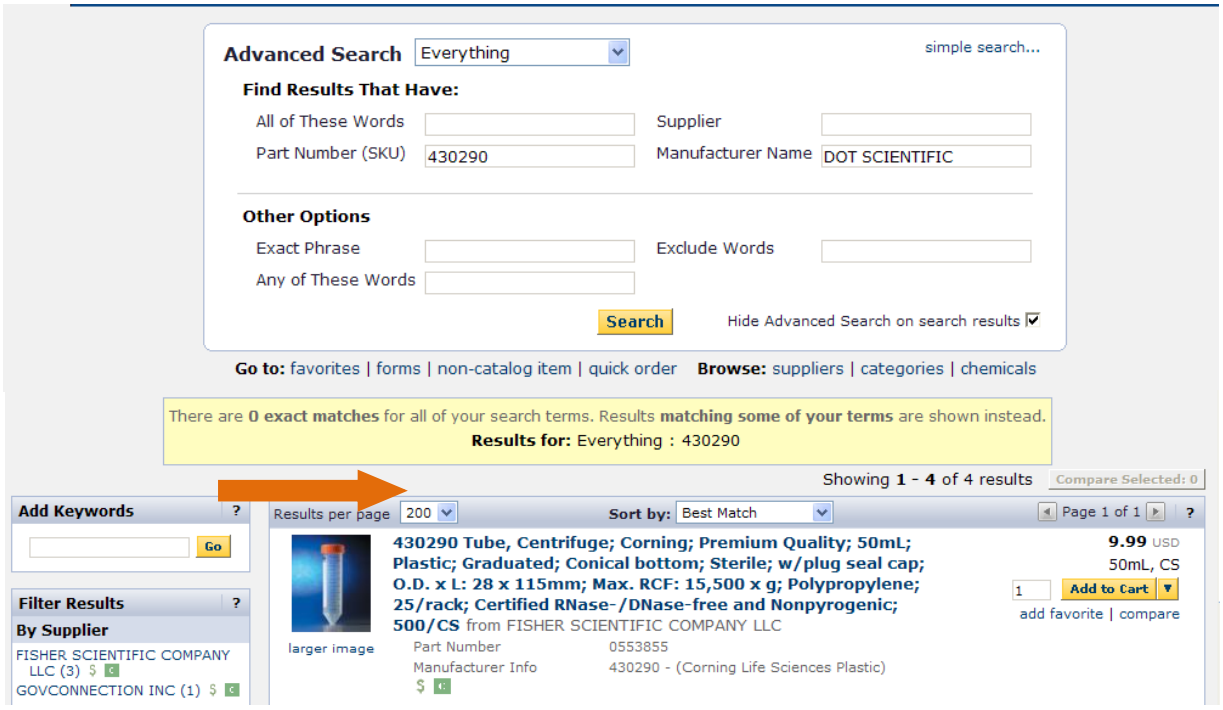
Shopping

Hosted Catalog Product Search

Part Number (SKU) Searches: If search results are not found, the system will look for previous orders of the part number using Document Search. For example, a search may be performed for a part number that is usually ordered through a punchout but is not available in a catalog. If document search locates previous orders, a View Previous Orders button is displayed.



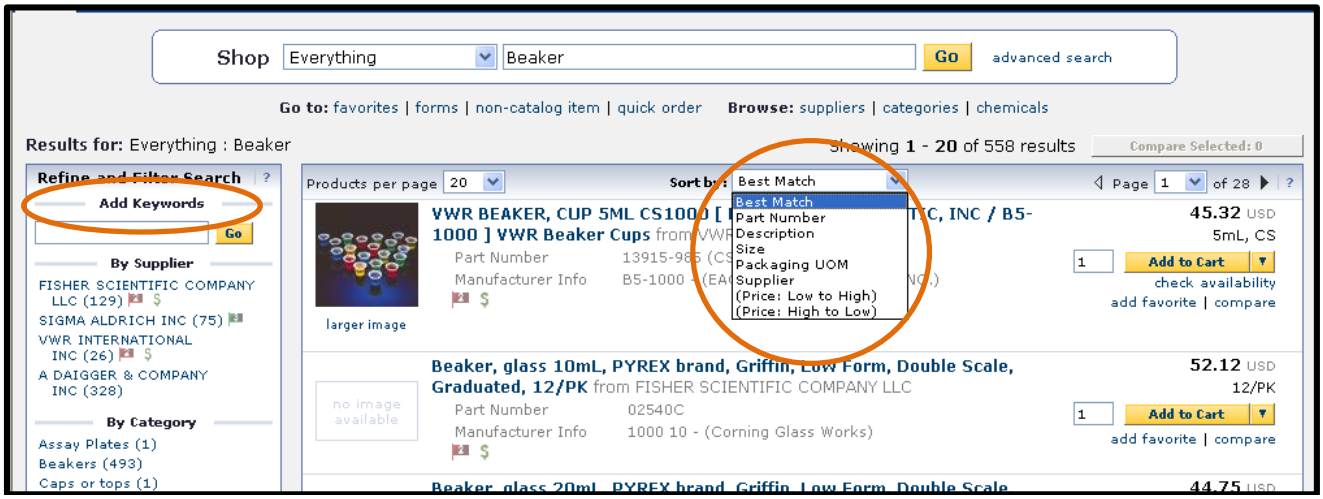
Advanced Search: If search results are not found using advanced search with multiple criteria, the system will automatically 'open up the search' by only searching for keywords and/or part numbers. Search results will display the matching terms with the search results.



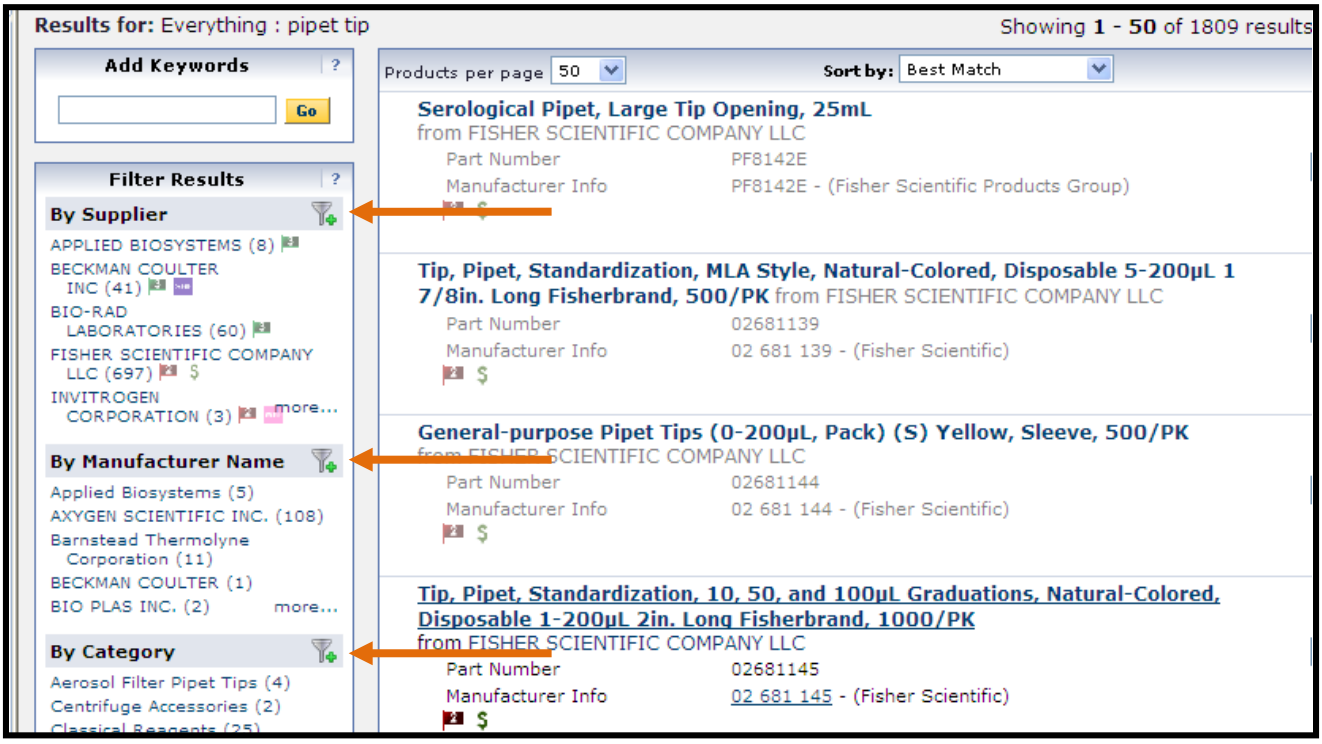
Hosted Catalog Product Search

Your catalog search results can be sorted by using the drop down box which provides a number of sort options. In addition, there are a various filters available to further refine your search located in the tool bar on the left side of the search result screen. Additional details of each item may be reviewed by clicking on the item.

When selection is made, enter quantity on the line item and then click Add to Cart button.

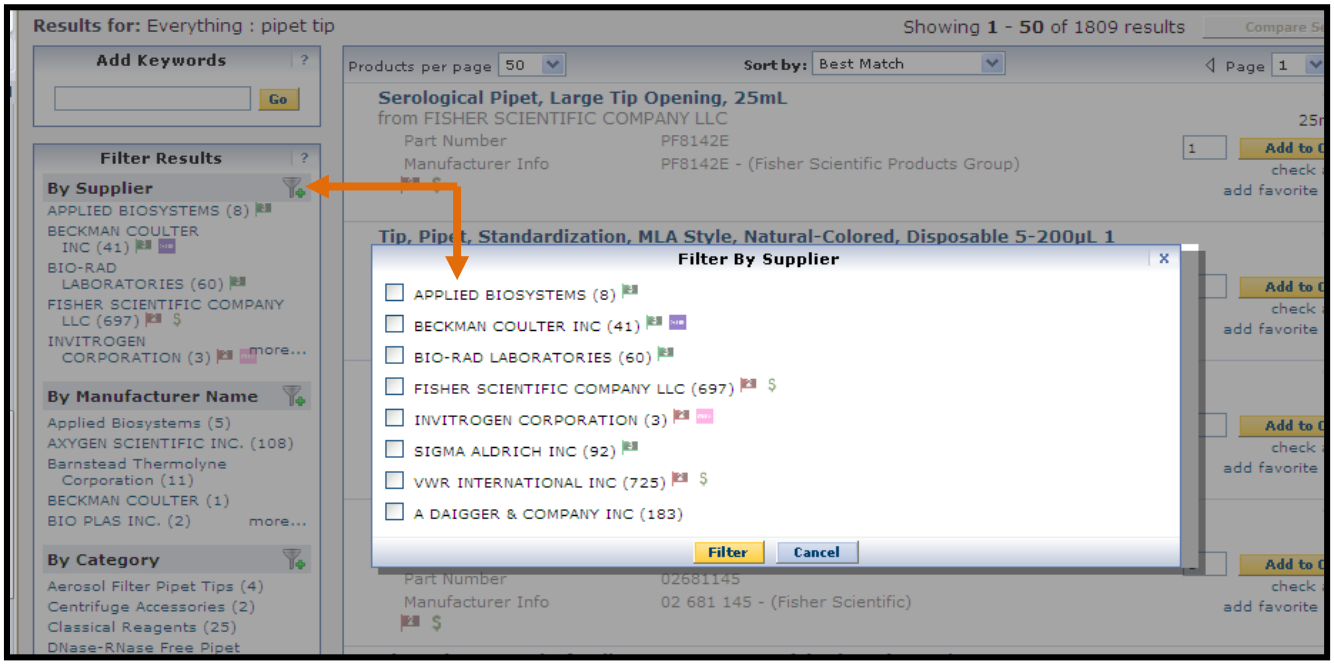


When 3 or more values are present in the search results, the filter icon will display.

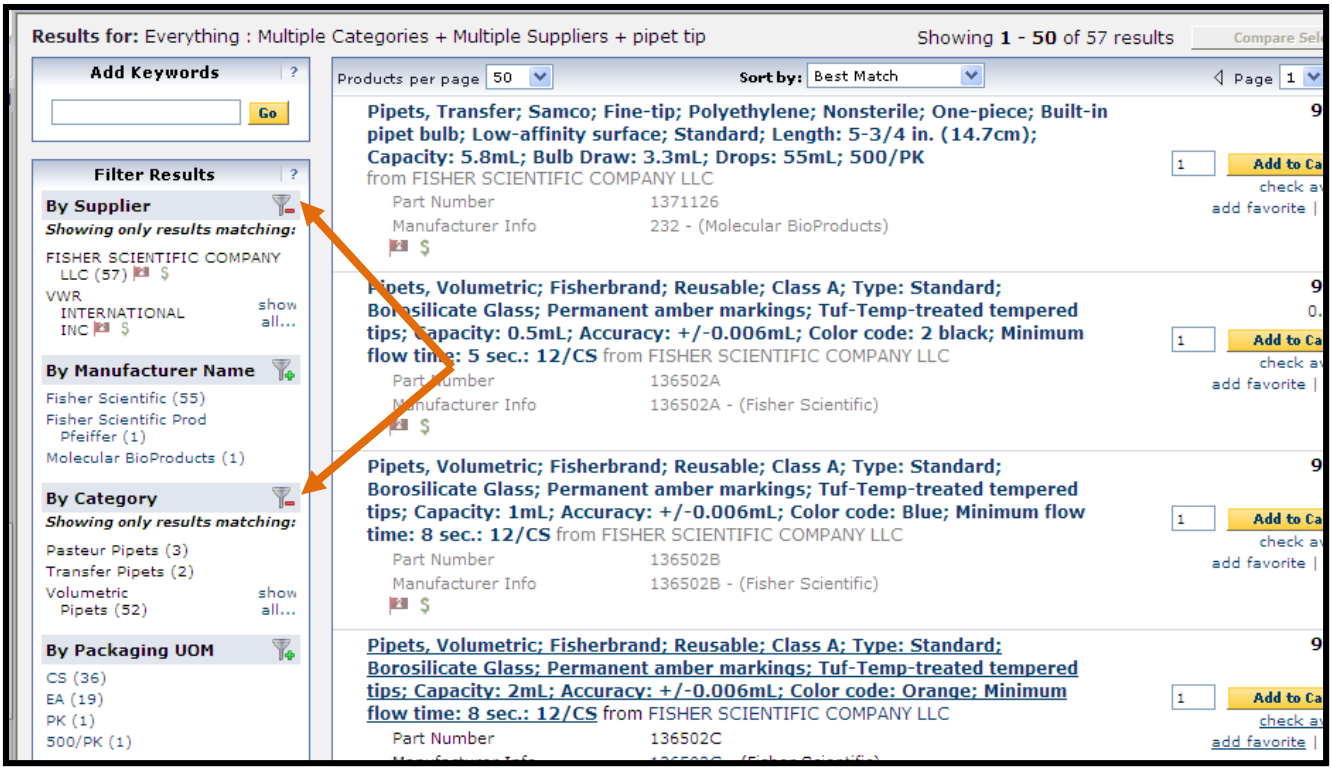


Hosted Catalog Product Search

Click the filter icon to display the available choices. Select the checkbox(s) and click the yellow Filter button to refine your search.



You can assign multiple filters as shown. To remove the filter, click the filter icon.



Shopping

External Catalog (PunchOut)

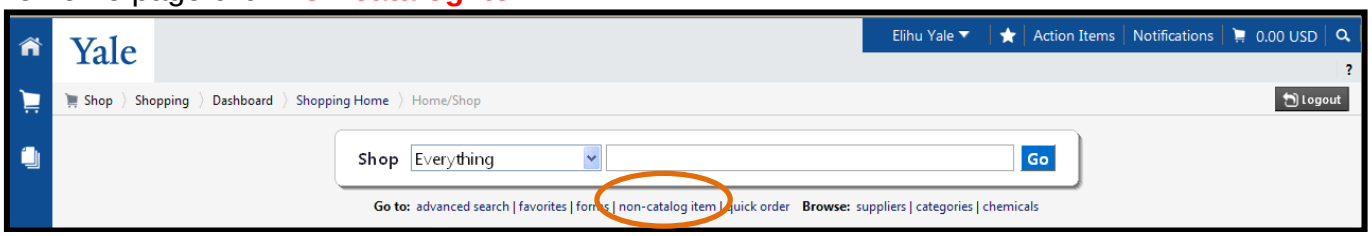
Go to home page

- The External Catalogs section displays the logos of the available suppliers. Click the desired logo to access the external catalog.
- Shop the site just as you would most internet shopping sites.
- Select the items to add to your cart.
- Select the 'checkout' or 'complete order' option to return the items to your SciQuest shopping cart.

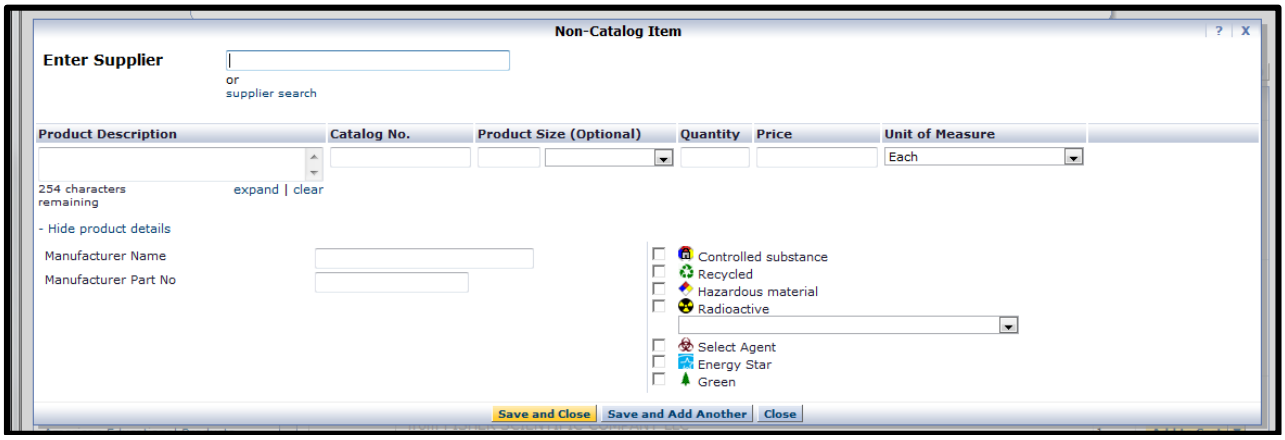
Non-Catalog Item

You should use the non-catalog item for products not listed in a supplier's catalog, when no supplier catalog is available or when you have received a special price quote from the supplier.

From the home page click **non-catalog item**



The Non-Catalog Item pop-up window will appear



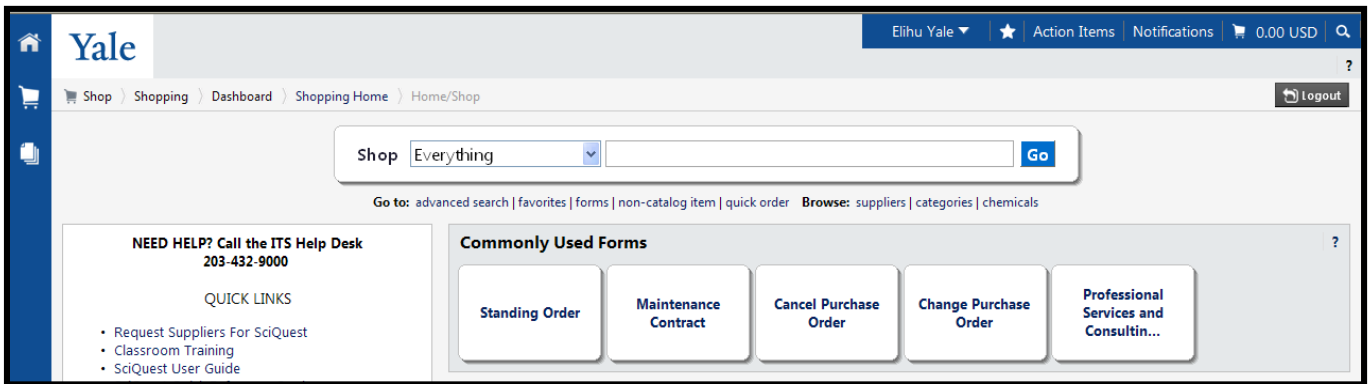
1. Enter **supplier name** or use "supplier search" to select a supplier
2. Enter **product information**. This information will be included on the Purchase Order to the supplier, so be as descriptive as possible.
   a. Click **Save and Close** button to add the item to your active shopping cart
   -OR-
   b. Click **Save and Add Another** button for multiple items from the same supplier

Shopping

Forms

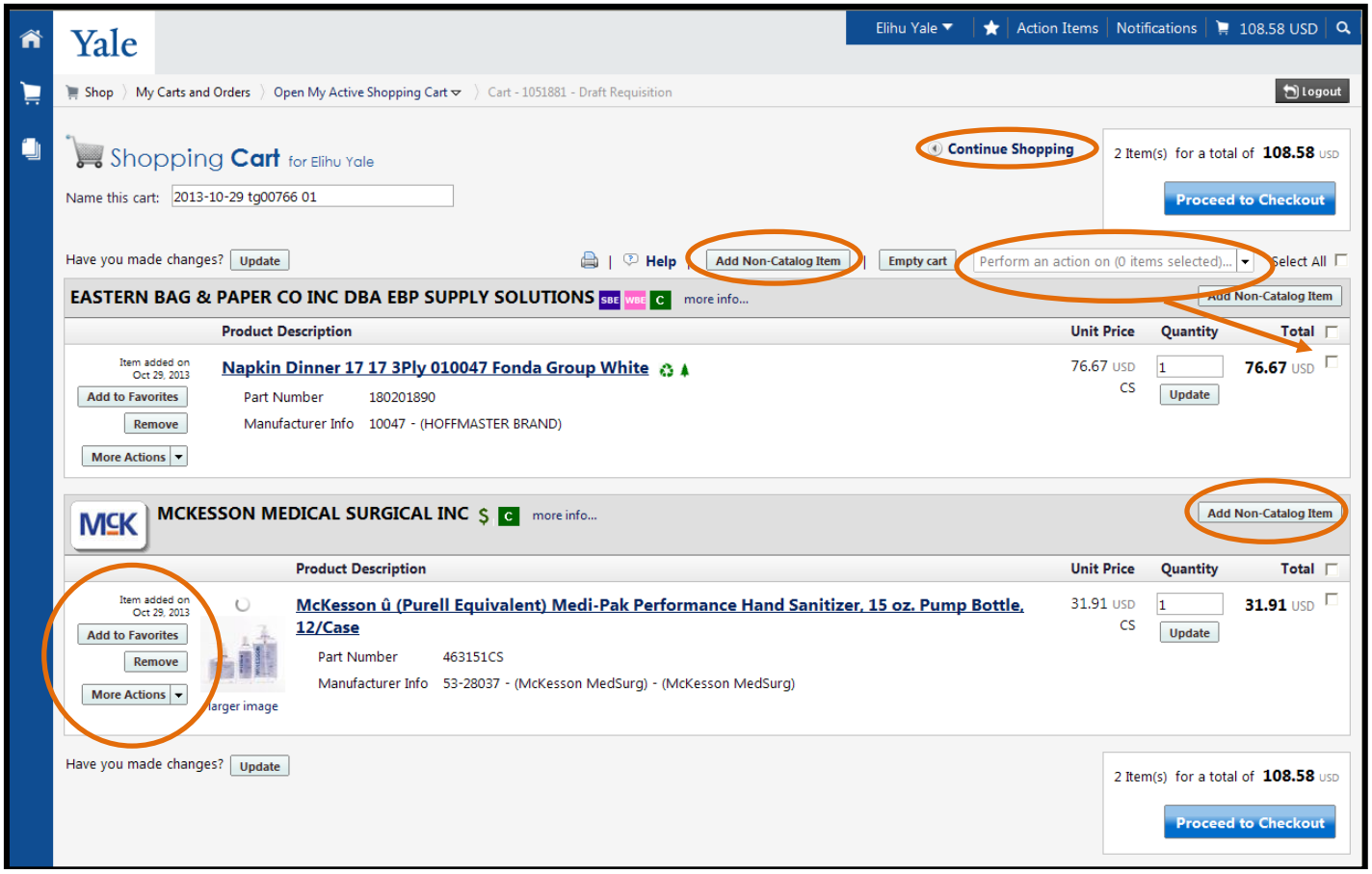
Forms have been created for ease of use in generating Standing Orders, Maintenance Contracts and requests for Biosafety Cabinet Service. In addition, Purchasing Services requests, such as Cancelling or Changing a Purchase Order can be handled via a form.

Forms are located on the home page in the Commonly Used Forms section



Shopping Cart: Proceed to Checkout

- Cart items are grouped by supplier
- Search for additional items to purchase via the Continue Shopping link
- The Add Non-Catalog Item buttons are available to
  - add a new supplier to the cart
    - OR -
  - to add an additional item for a supplier listed in the cart
- Line level actions are easy to identify and perform.
- Actions for multiple lines are available. Select the lines to view the available actions.



Begin the checkout process by selecting the **Proceed to Checkout** button. This button is located at both the top and bottom of the cart.

IMPORTANT: After you enter the checkout process, you will still have the option to return to the cart or continue shopping.

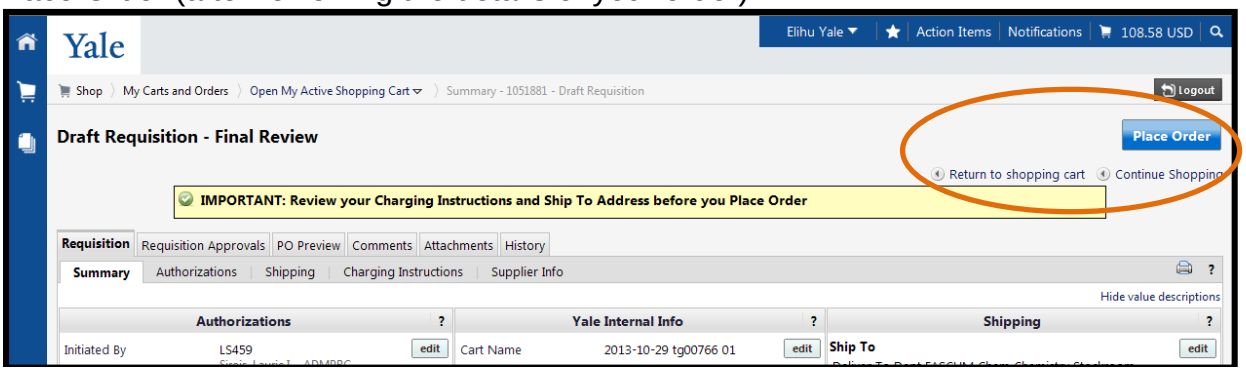
Checkout: Draft Requisition – Final Review

Overview

When you click Proceed to Checkout from the shopping cart**,** you will be brought to the **Draft Requisition - Final Review** screen.

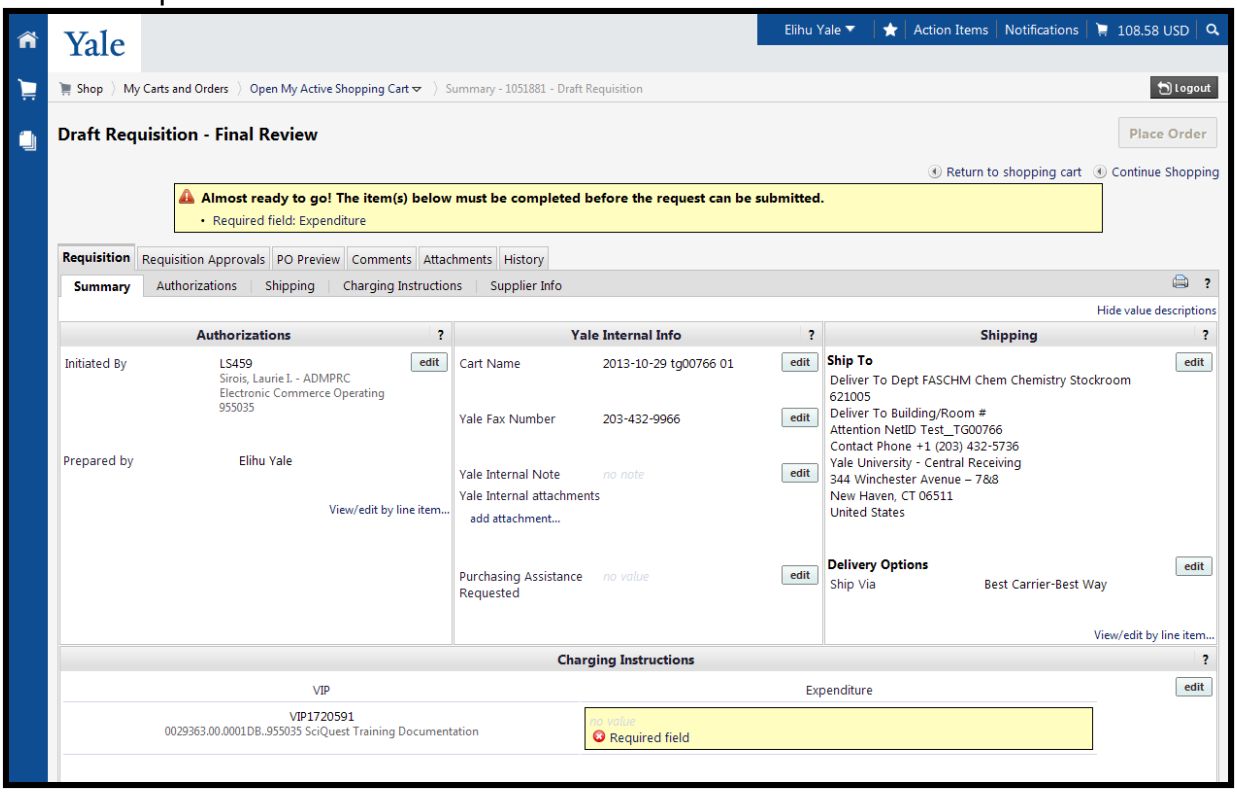
From here you can:

- Return to shopping cart to edit quantities
- Continue Shopping (search for additional items)
- Place Order (after reviewing the details of your order)



Error Handling

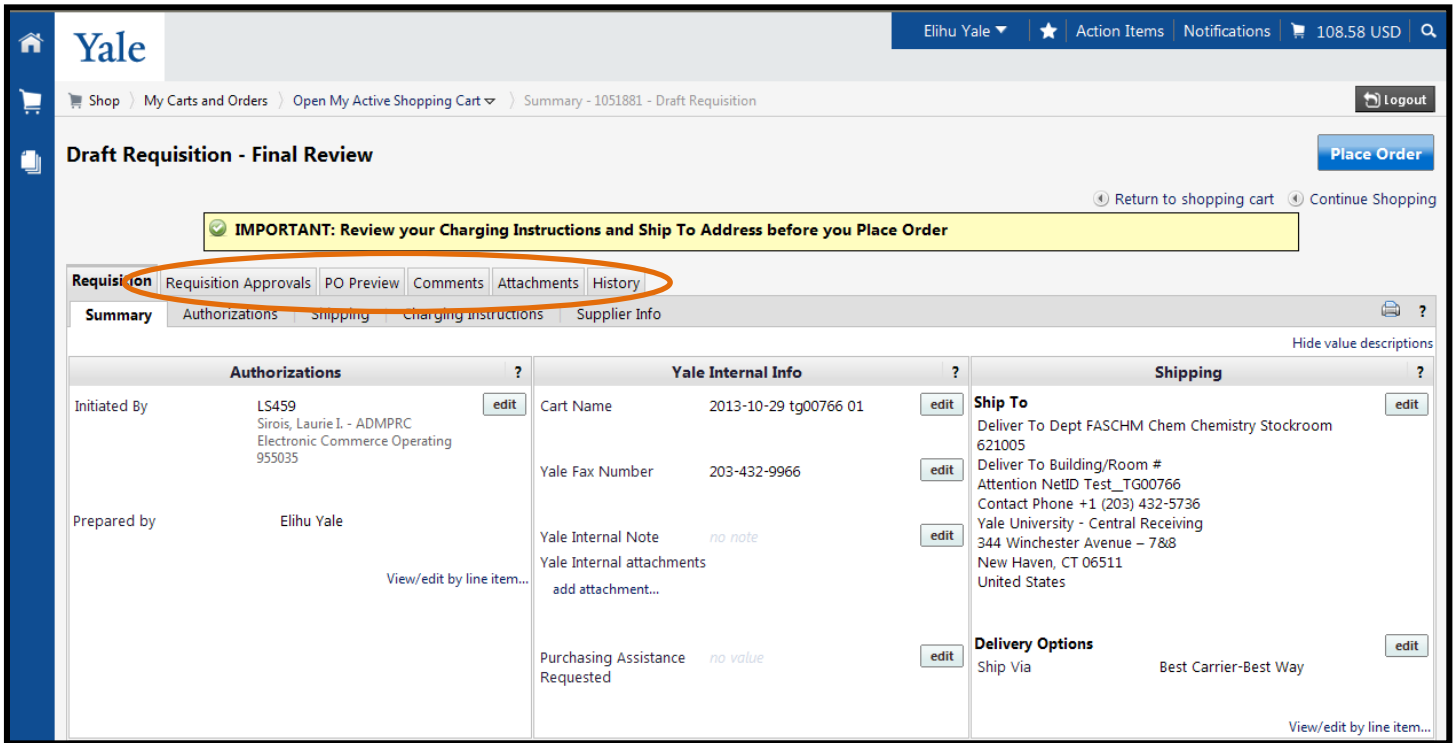
When you enter checkout, any missing required information will be identified and highlighted at the top of the screen AND in the section requiring the missing information. To enter the required information, you can click the item in the message and a pop-up window will appear allowing you to quickly add the required information.



Checkout: Draft Requisition – Final Review

Navigation Tabs

- **Requisition Approvals**: Will display applicable workflow approval steps and whether they are complete or pending
- **PO Preview**: Will display the separate POs that will be generated based on different suppliers or ship to addresses
- **Comments**: Will display all comments/notes and specify whether they are Internal (Yale Only) or sent to the supplier
- **Attachments**: Will display and provide a link to all attachments and specify whether they are Internal (Yale Only) or sent to the supplier
- **History**: Will display all actions, along with date and time stamp



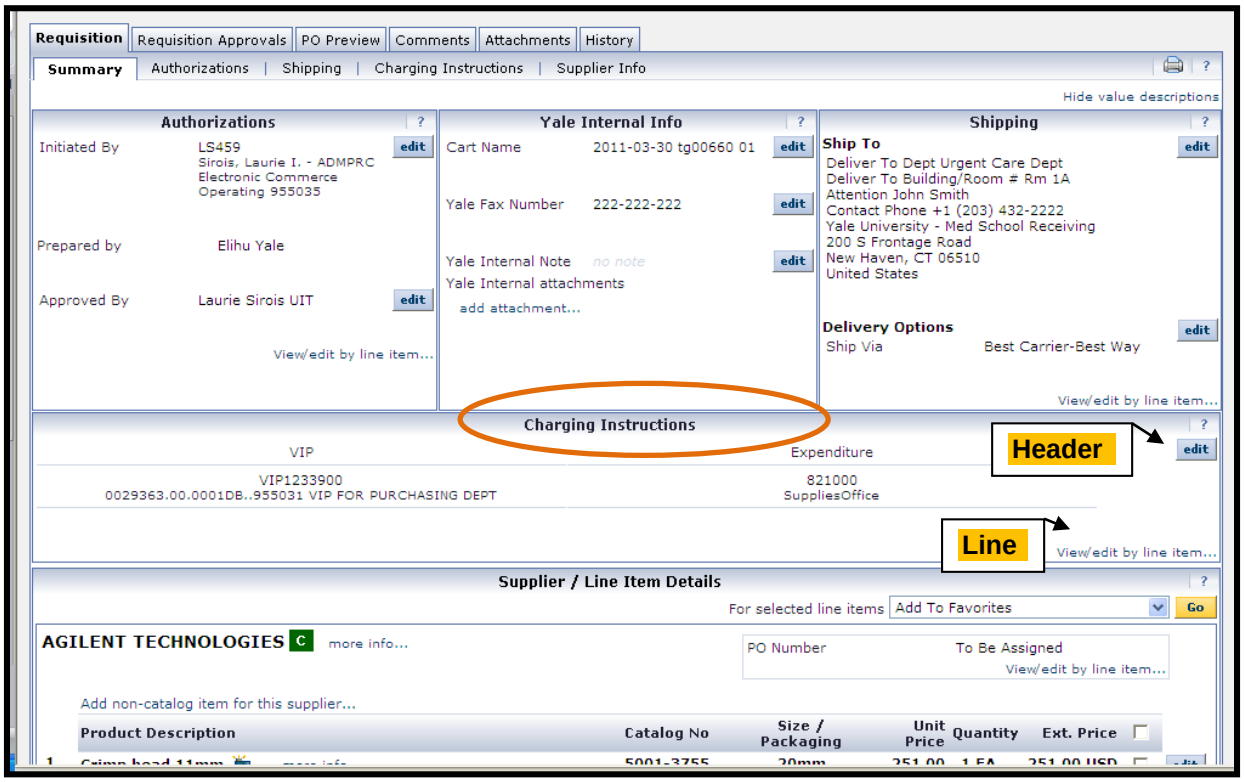
Summary Screen

- **Authorizations:** The name of the Initiator, Preparer and if applicable, the Approver are displayed and managed here.
- **Yale Internal Info Section:** Information contained in this section is for **Yale use only**. Yale requirements such as sole source or competitive bidding documents should be attached here. Notes/comments and attachments included in this section will **not** be sent to the supplier.
- **Shipping Section:** The ship to address and delivery options displayed in this section will apply to all lines of the order. You can change the ship to address here (header level) which will apply to all lines of the order. Or, you can change individual lines by clicking the View/edit by line item link in the lower right hand corner. Note: Different ship to addresses will create separate purchase orders to the supplier(s).

Checkout: Draft Requisition – Final Review

Charging Instructions

If Default values are specified in your profile, they will be automatically populated here. Changes can be made to the VIP and/or Expenditure at the header level and will be applied to all lines –OR- changes can be applied to selected line(s).



Change Charging Instructions – Header or Line Level

To change VIP/Expenditure at the header level (for all lines)

Click the **edit** button

The charging instructions pop-up box will appear

-OR-

To change VIP/Expenditure at the line level

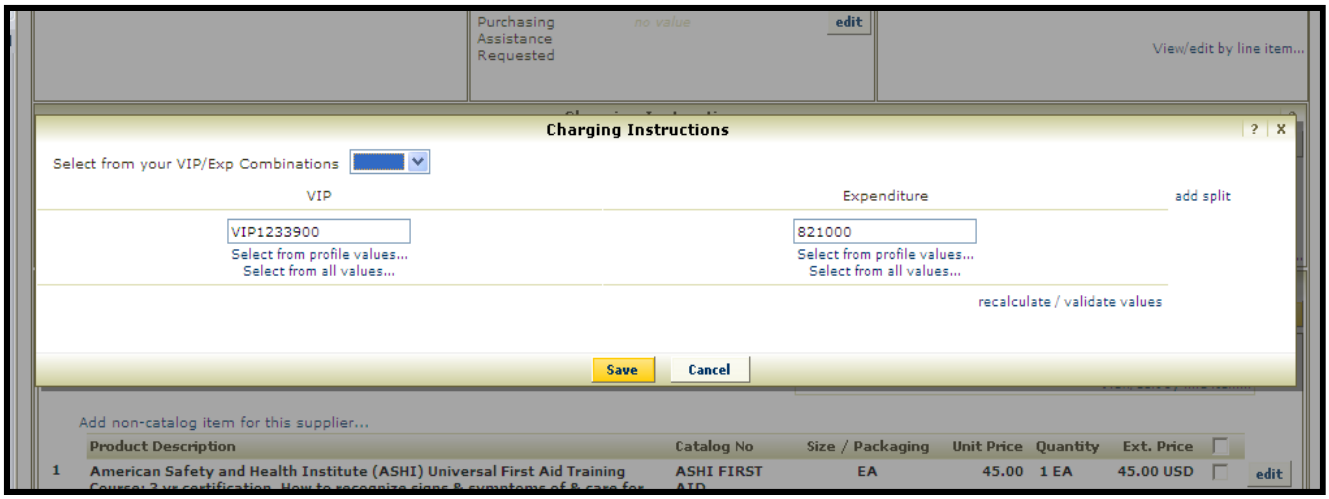
Click **View/edit by line item**

Click the **edit** button on the desired line

The charging instructions pop-up box will appear

IMPORTANT: CHANGES MADE ON THE LINE LEVEL WILL OVERRIDE THE HEADER LEVEL CHARGING INSTRUCTIONS

Change Charging Instructions – Pop-up Box



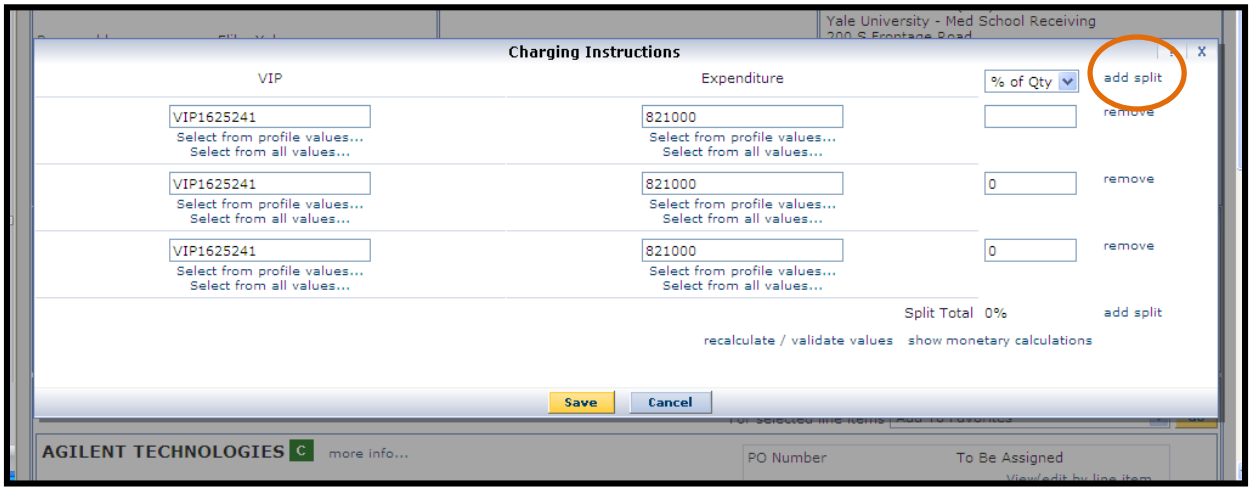
1. VIP/Exp Combinations
   a. To retrieve a combination stored in your profile choose **Combination** from drop down list
   b. Click **Save** button
2. Change VIP
   a. To retrieve a VIP stored in your profile click **Select from profile values**
      i. **Select VIP** from drop down list
      ii. Click **Save** button
   b. To search all active VIP numbers click **Select from all values**
      i. **Enter search criteria** in Search For Value box
         1. Value=VIP number - OR -
      ii. Description= Search by any segment of the PTAO, such as the Org number, or by the Description such as the department name or grant name.
   c. Click **Select** button next to appropriate value
   d. Click **Save** button
3. Change Expenditure
   a. To retrieve an Expenditure stored in your profile click **Select from profile values**
      i. **Select Expenditure** from drop down list
      ii. Click **Save** button
   b. To search all active Expenditures click **Select from all values**
      i. **Enter search criteria** in Search For Value box
         1. Value=Expenditure number - OR -
         2. Description=Expenditure description
   c. Click **Select** button next to appropriate value
   d. Click **Save** button

Change Charging Instructions - Pop-up Box - Split Charging

Click **add split** (as many splits as necessary can be added)

Split Charging at the header level is done via ***% of Qty***

Split Charging at the line level can be done via ***% of Qty*** - OR - ***Amount of Qty***



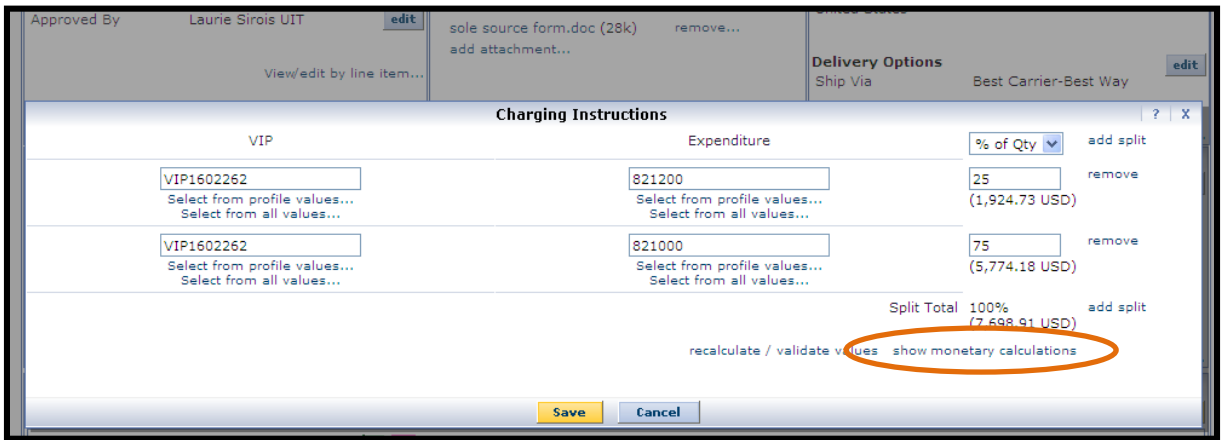
Select/Change any necessary VIP/Expenditure values

Enter the split information

Click **Save** button

Monetary calculation aid for split charging

- The 'show monetary calculations' link is available for split charging.
- Clicking this link will display a calculated monetary value for each % value entered. This can be useful in determining the appropriate % to apply. This calculation is for information purposes only.
- An approver can also view this information as part of their review process.

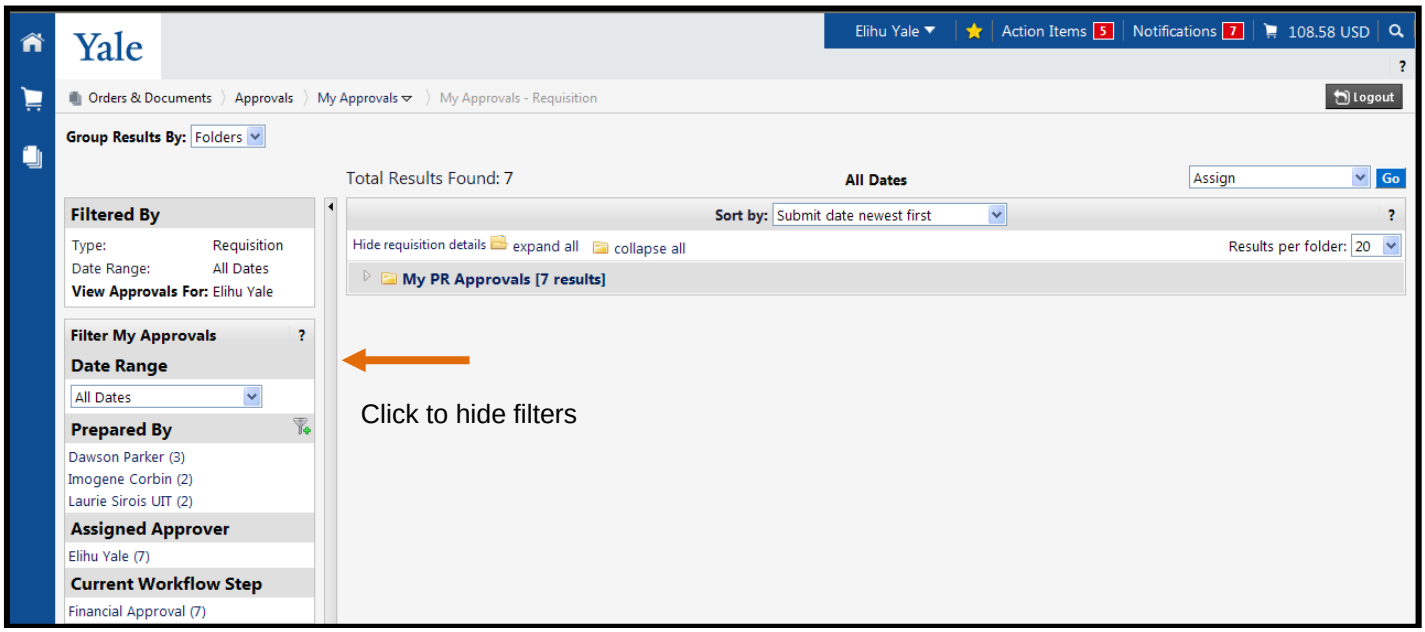


Managing Approvals

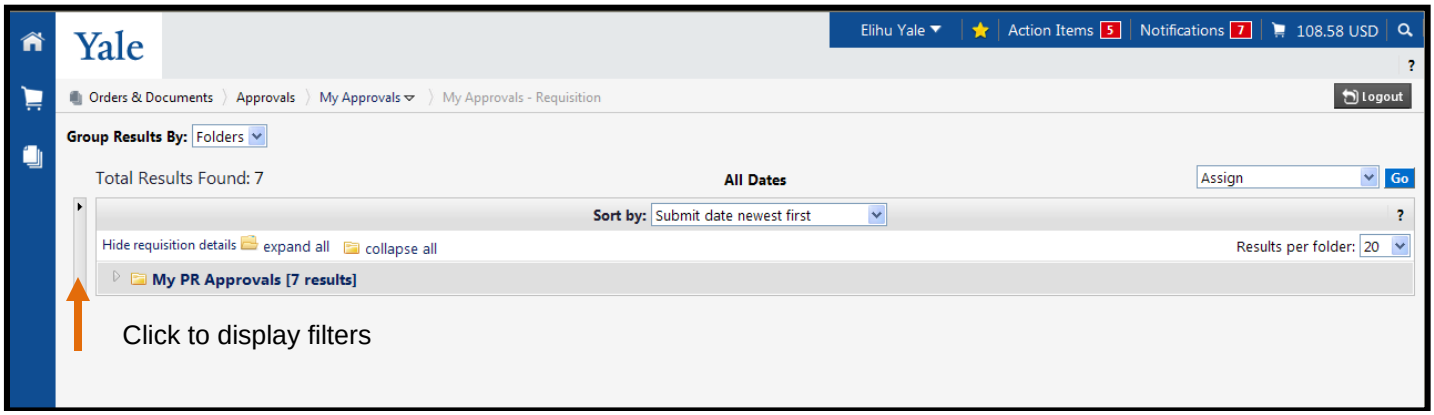
My Approvals

Approval activity is done at the **My Approvals** screen.

From Slide-Out Menu: **Orders & Documents** > **Approvals** > **My Approvals**

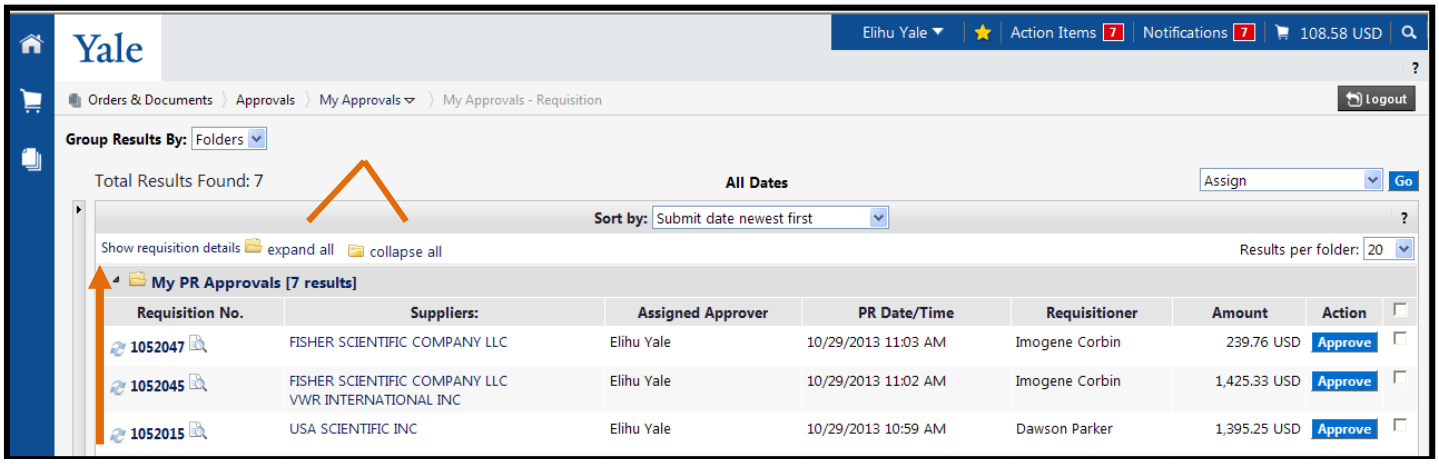


Filters are available to assist in searching for and displaying specific orders. The filters can be hidden or displayed by clicking the separator bar.

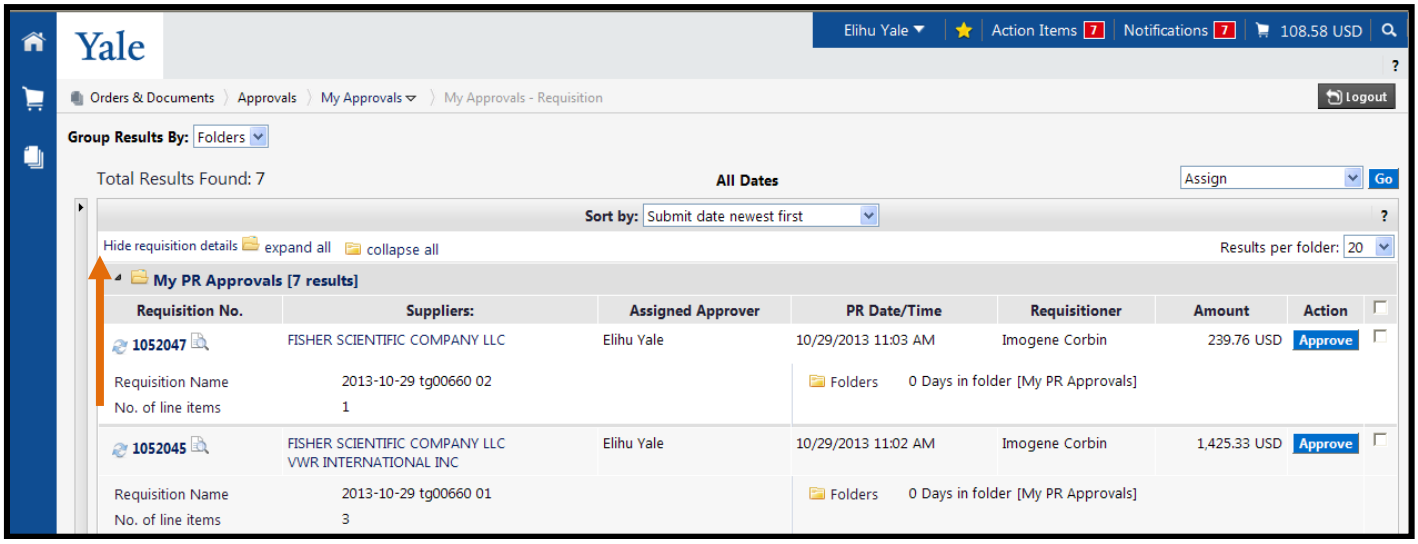


My Approvals

Expand all will display the list of orders for approval. **Collapse all** will only display the folder name.



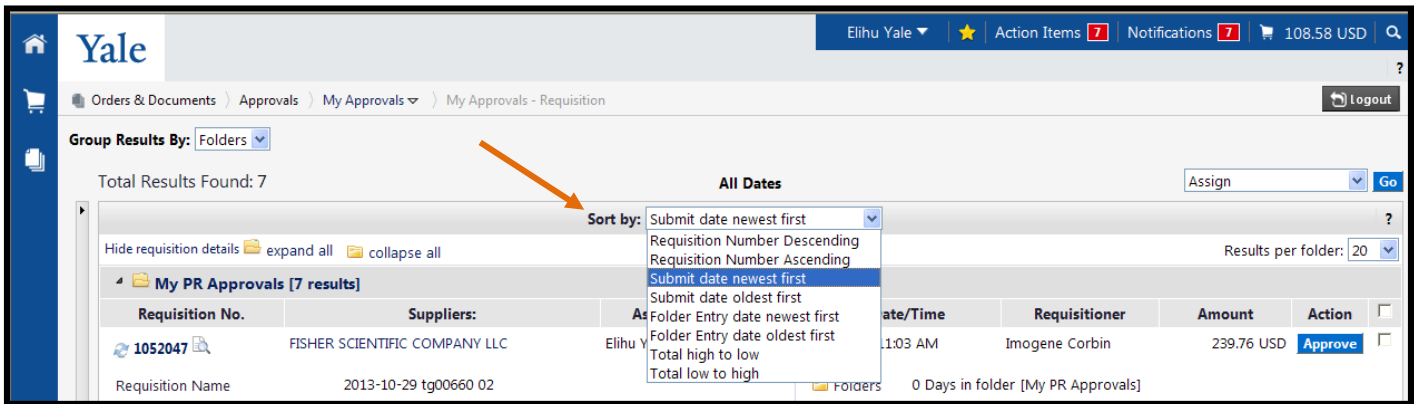
The **Show requisition details** link will display the requisition name, number of line items, and the number of days it has been in a specific folder as shown below. When requisition details are displayed, the **Hide requisition details** link will be available.



Managing Approvals

My Approvals

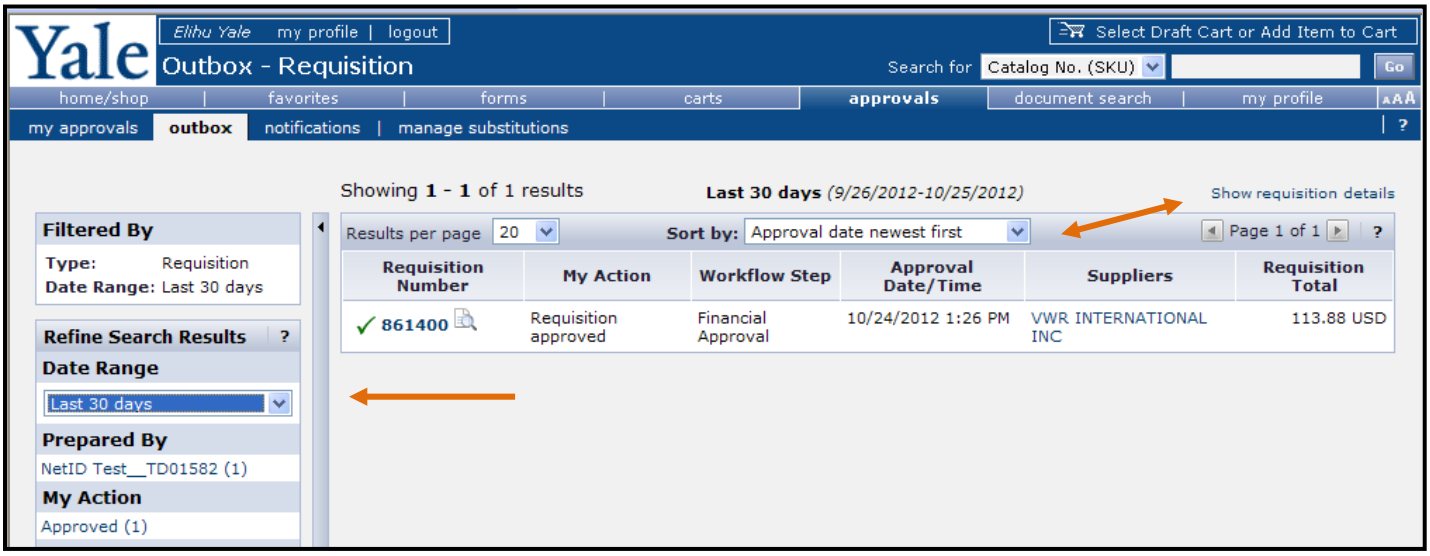
Sort options are available for the list of approval documents. The default sort is “Submit date newest first”.



Completed Approvals

From Slide-Out Menu: **Orders & Documents** > **Approvals** > **My Recent Approvals**

Documents approved in the last 30 days are automatically displayed. The date range can be easily changed in the filter section. Sorting options and the ability to hide/show requisition details are available.



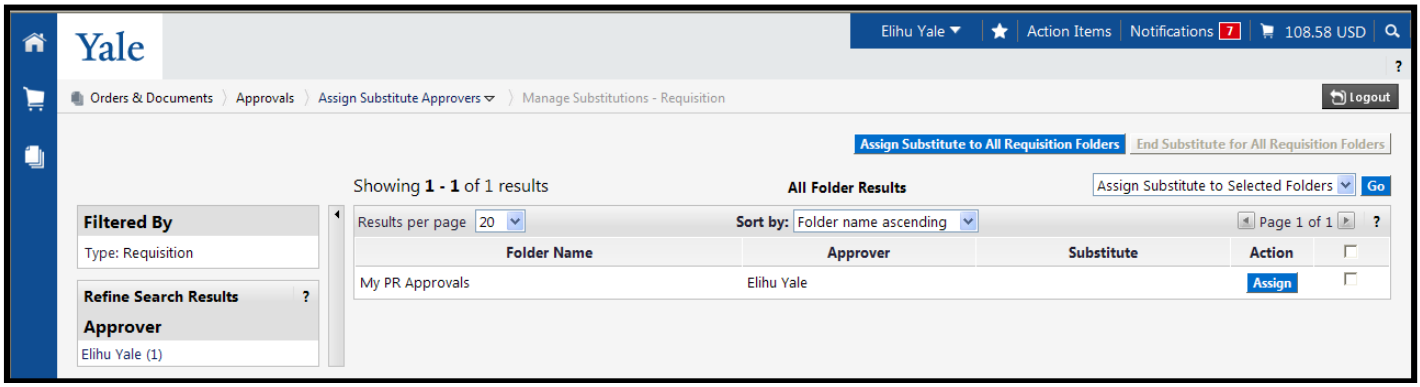
Managing Approvals

Manage Substitutions

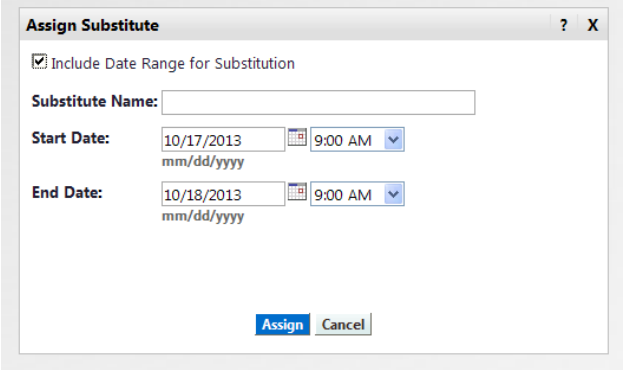
Assign a substitute for your order approvals when you are unavailable. When a substitute is assigned, future orders requiring your approval will be automatically routed to your substitute. It will not redirect any orders in your approval folder at the point you assign the substitute.

From Slide-Out Menu: **Orders & Documents** > **Approvals** > **Assign Substitute Approvers**

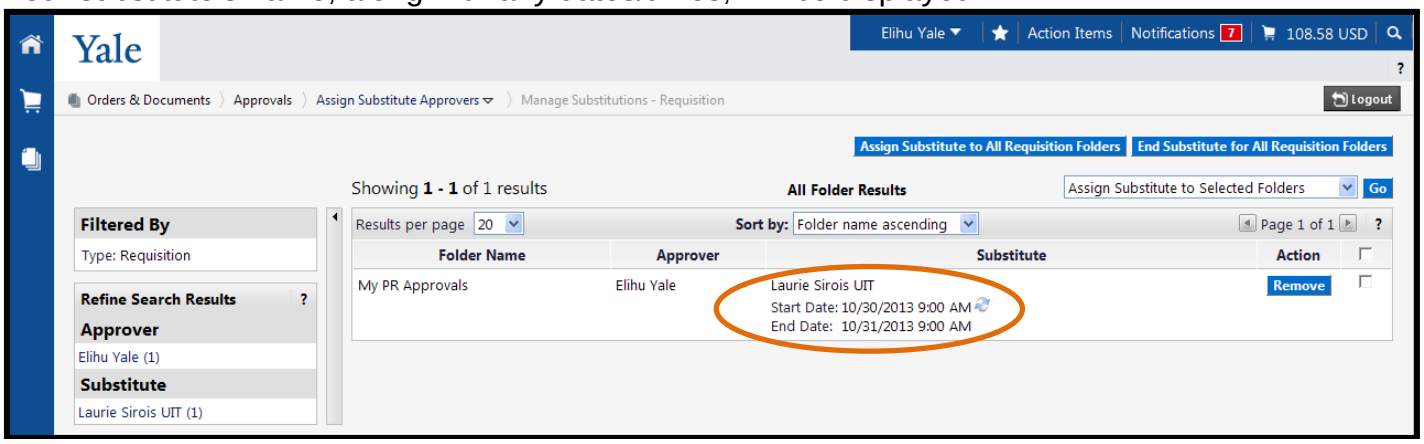
Click **Assign Substitute to All Requisition Folders**



A pop-up window will appear. To schedule in advance, check the Include Date Range for Substitution. Start and End Date/Time fields will appear. Search for and choose your substitute. Click the Assign button.



Your substitute's name, along with any dates/times, will be displayed.

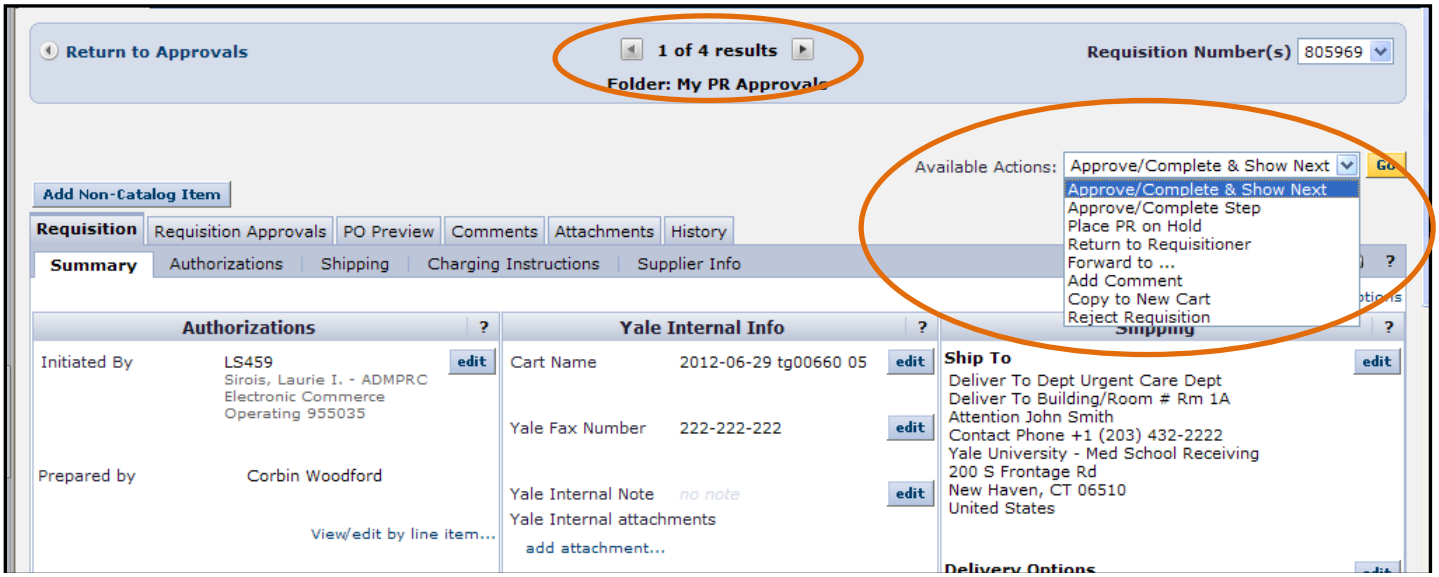


To turn off substitution, click **End Substitute for All Requisition Folders** button.

Approving Orders

Review / Approve

When an approver opens a requisition for review, there are Previous and Next links (arrows) to navigate between the requisitions that are in the folder.



Available Actions in the drop-down list:

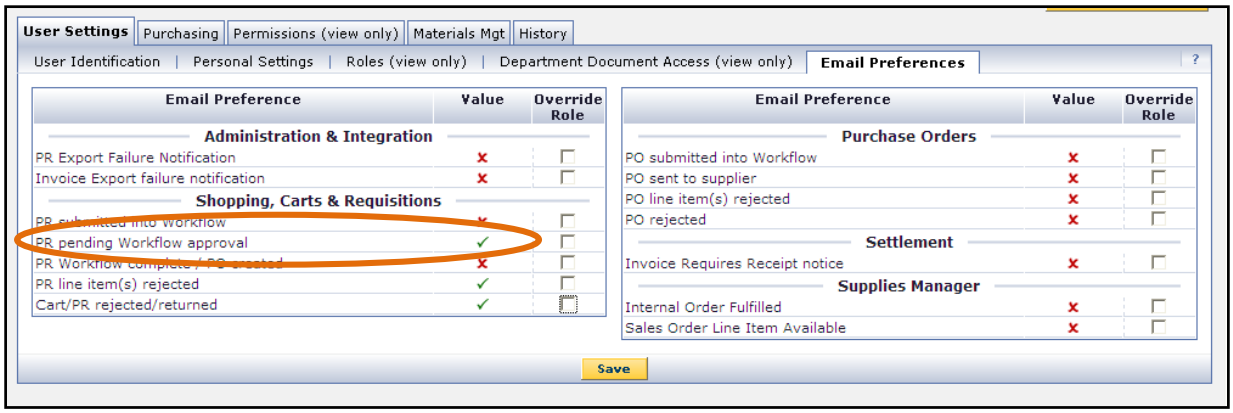
- **Approve/Complete & Show Next:** Allows approvers to approve the current requisition and immediately be taken to the next requisition in their approval folder.
- **Approve/Complete Step:** Approves the selected document(s) in the folder list. This action approves the current workflow activity for the document. The document continues to the next step in the workflow process.
- **Place PR on Hold:** Change the status of the document to "On Hold" in order to review the document at a later time. T he status is displayed to others to indicate that the document is awaiting additional investigation or will be reviewed later. The approver can enter a reason for the action that is stored in the document's history.
- **Return to Requisitioner:** Return the requisition to the requisitioner for modifications/changes. This action will cause the requisition to go back to a draft cart and will need to be re-submitted to restart to the first step of workflow.
- **Forward to:** Send the document to another approver for review. This action allows the approver to select another authorized approver, enter a note and forward the document for approval.
- **Add Comment:** Add any text to the Comments tab of the requisition or purchase order . Email notification of the comment is also an option.
- **Copy to New Cart:** Create a copy of the selected requisition as a new draft cart and take the user to the newly created cart. The copy action will copy all requisition information
- **Reject Requisition:** Reject all lines in the requisition. The approver will have the option to enter a note to provide additional details regarding the rejection. The note is stored in the document's history. Once a requisition is rejected this action cannot be undone.

Approving Orders

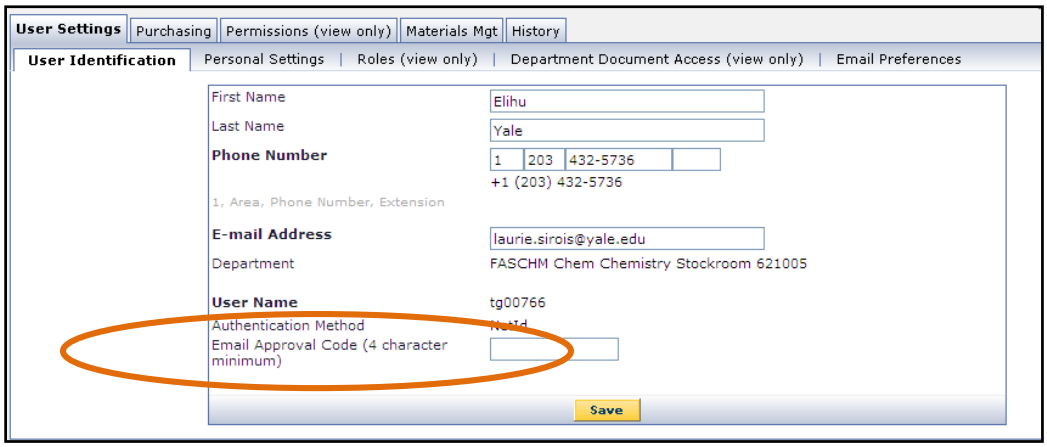
Approve from Email Notification

1. System generated email notifications are managed in your profile. To receive an email notification that your approval is required for a purchase requisition:
    a. Click **my profile**
    b. **User Settings** tab is displayed
    c. Click the **Email Preferences** tab

    The applicable email is named 'PR pending workflow approval'. A green check indicates an email will be sent; the red x indicates an email will not be sent. You can change this setting at any time.



2. An approval code is required for email approvals.
    a. Click **my profile**
    b. **User Settings** tab is displayed
    c. **Enter Approval Code** (4 character minimum)
    d. Click **Save**



Once the approval code is setup, you will have the option to review/approve via email **OR** directly in the SciQuest application. You can also remove this approval code at any time.

Approve from Email Notification (continued)

Email Notification Example:

Summary:

If you **have not setup an approval code in your profile**, a notice will be displayed.

No action is required if you choose not to setup email approvals.

Approval Request for Purchase Requisition (PR) # 605465

Dear Laurie Sirois UIT,

The requisition listed below has been submitted for your approval.

NOTICE: To approve requisitions via email (outside of the SciQuest application), an approval code is required. If you choose to take advantage of this option, you can setup and manage your personal approval code in your SciQuest profile.

Summary

Folder:	Laurie Sirois UIT
Prepared by:	Elihu Yale
Cart Name:	2011-07-18 tg00660 01
Requisition No.:	605465
No. of line items:	3
TOTAL:	**2,301.33 USD**

Details:

Contains the specific line item details for goods/services ordered.

Details for requisitions with 10 or more items will not be displayed. You will need to log into SciQuest to view the details.

Details

FISHER SCIENTIFIC COMPANY LLC

Item 1

Description:	Filters, MF-Millipore Mixed Cellulose Ester Membrane; 5.0um; Type: Plain; Diameter: 142mm; Pack of: 50; 5
Catalog Number:	SMWP14250
Quantity:	100
Unit Price:	9.99 USD
Ext. Price:	999.00 USD
Size/Packaging:	142mm PK
Product Flags:	Hazardous material

Item 2

Description:	Tube, Microcentrifuge; Fisherbrand; Polypropylene; w/attached locking cap; Graduated; Capacity 0.6mL; Ma: 500/PK
Catalog Number:	02681300
Quantity:	100
Unit Price:	9.99 USD
Ext. Price:	999.00 USD
Size/Packaging:	0.6mL PK

Charging Instructions:

When changes are made to specific lines, notification will be displayed. **You will need to log into SciQuest to view the changes.**

If you have setup your approval code, this will be visible. Click **Take Action** which will open a web page to review/approve the order

Charging Instructions

VIP: VIP1625304 - 1062457.00.51387A..696102 SciQuest Upgrade 11.2 Test HOP7 for Org 696102
Expenditure: 881200 - Equip - Lab Cost >= cap amt
50.0% of Qty - 1,150.67 USD

VIP: VIP1625305 - 1056138.1.AS0191..733003 SciQuest Upgrade 11.2 Test HOP for Org 733003
Expenditure: 881200 - Equip - Lab Cost >= cap amt
50.0% of Qty - 1,150.67 USD

Charging Instructions Note: LINE VALUES CHANGED (different than this header value)

Ready to approve, reject or return this requisition? **Take Action**

Approve from Email Notification (continued)

Email Notification Example (continued):

Additional Information

Any comments added to the document will be noted with the number (1) of comments. This example contains no comments (0).

Attachments are noted but cannot be accessed from the email.

You will need to log into SciQuest to view comments and attachments.

Additional Information

Yale Internal Note
Yale Internal Notes are displayed here.

Summary Details

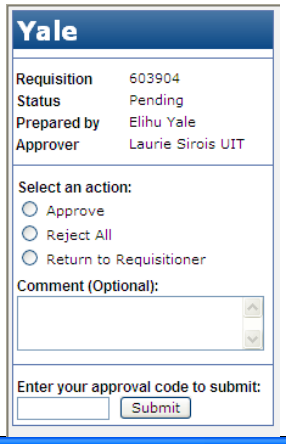
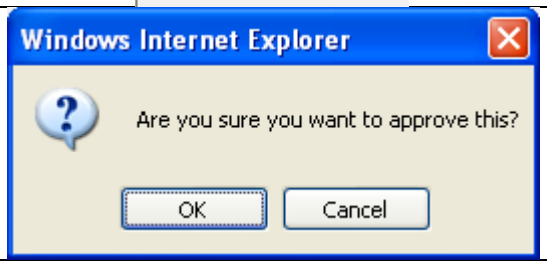
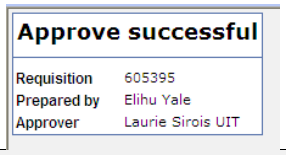
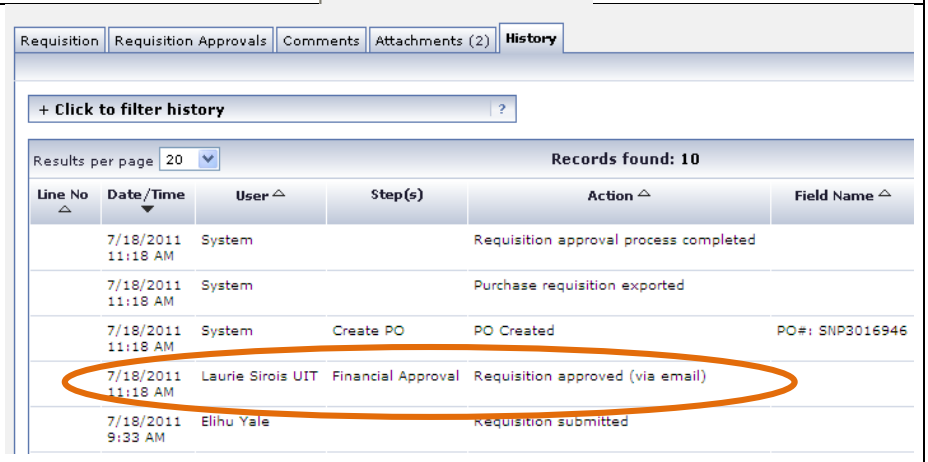
Initiated By:	LS459 - Sirois, Laurie I. - ADMPRC Electronic Commerce Operating 955035
Yale Fax Number:	222-222-222
Purchasing Assistance Requested:	
Comments:	(0)

Yale Internal attachments
Test attachment.doc

Shipping Address
Deliver To Dept Urgent Care Dept
Deliver To Building/Room # Rm 1A
Attention John Smith
Contact Phone +1 (203) 432-2222
Yale University - Med School Receiving
200 S Frontage Road
New Haven, CT 06510
United States

Approving Orders

Email Approval Steps

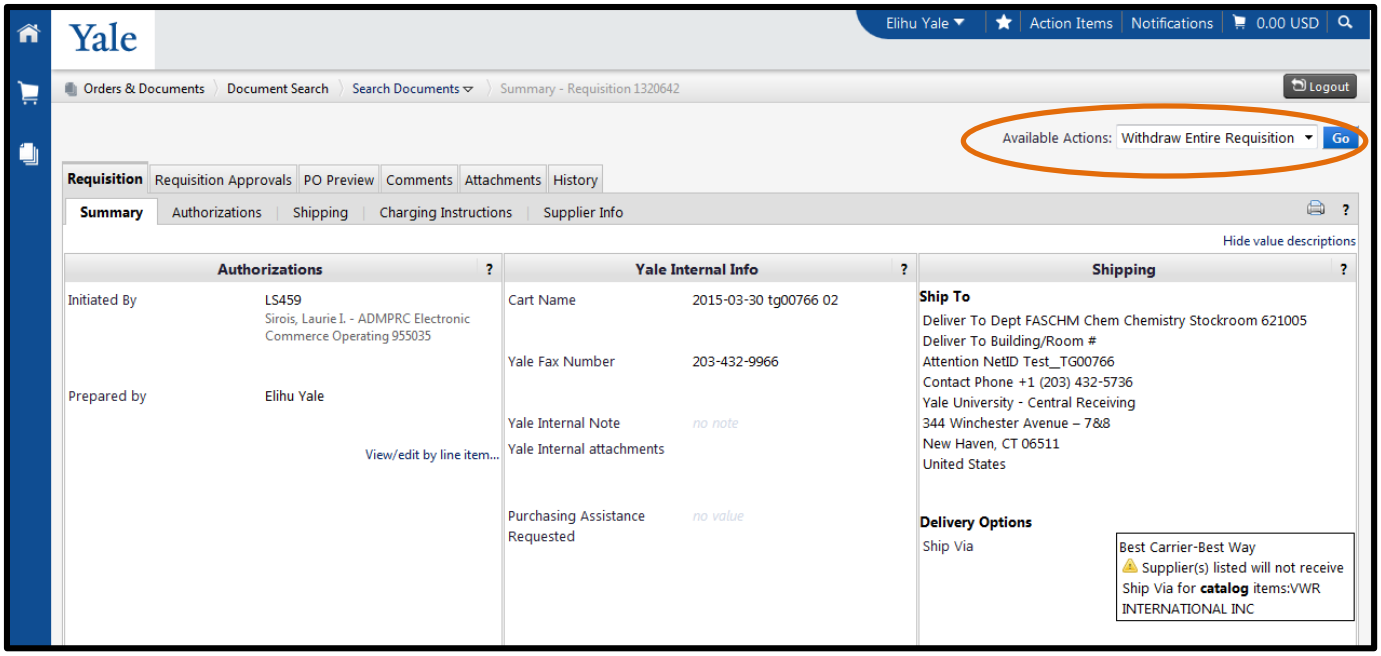
Within the email, click the **Take Action** box	
Your internet browser will open and this box will be displayed on a web page: 1. Select your action 2. Add comment if desired 3. Enter your approval code 4. Click Submit	
The final option to approve or cancel	
Confirmation of approval	
PR history records that the approval was performed via email	

Withdraw Requisition

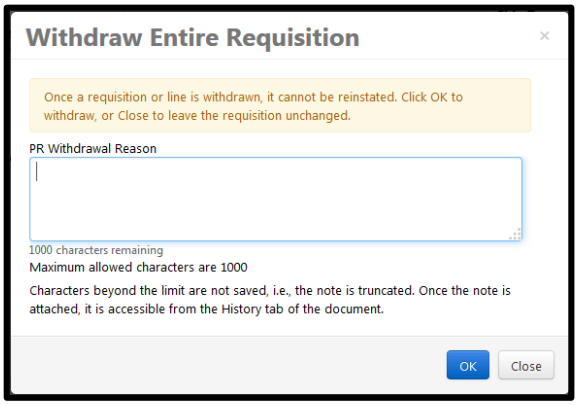
Any requisition that is pending approval can be withdrawn by the requisitioner.

Display the pending requisition on your screen.

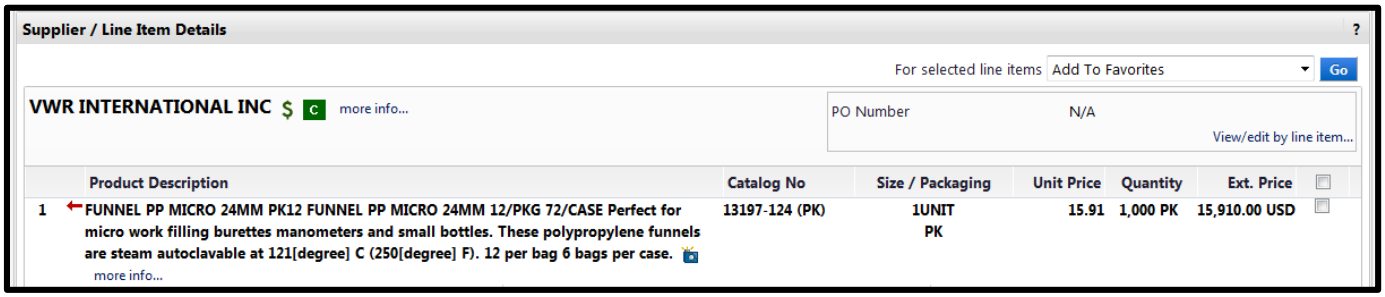
From the Available Actions drop down list choose Withdraw Entire Requisition, click Go



A pop-up window will appear. If desired, enter notes, then click OK



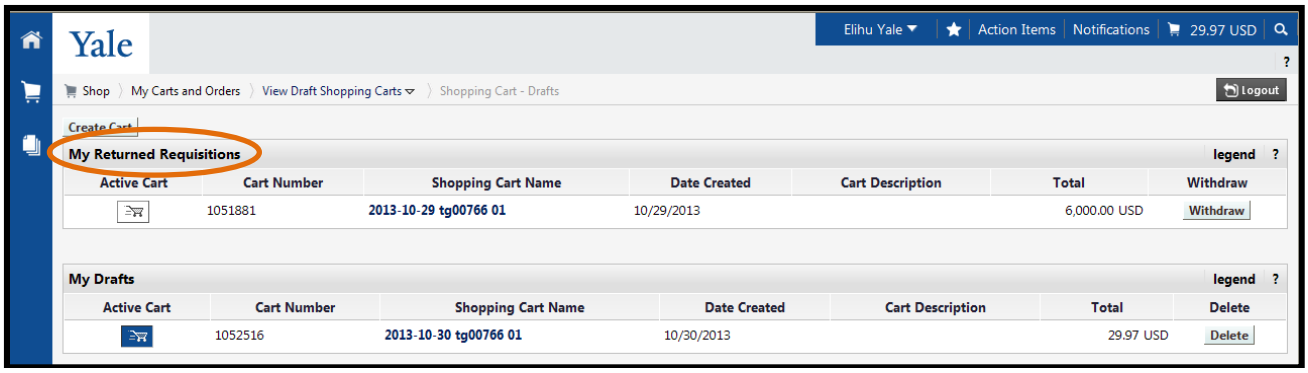
The requisition is still displayed on the screen and the withdrawn icon is displayed on the line.



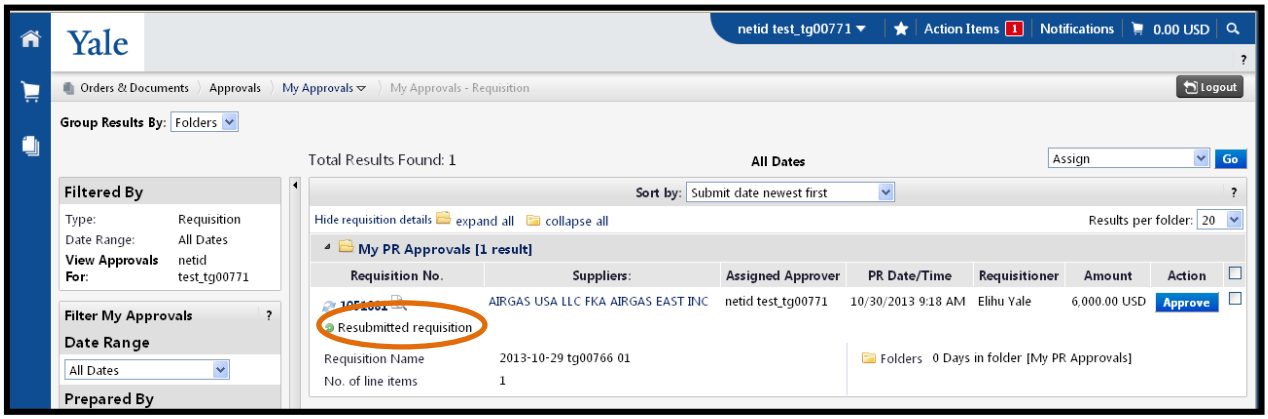
Returned Requisitions

This feature allows a requisition to be returned to the requisitioner (preparer) to make changes to the requisition, such as charging instructions. This feature enables an approver to 'return' instead of 'rejecting' a purchase requisition. Since these types of changes could affect approval requirements, the requisitioner will receive this returned requisition as a draft shopping cart to edit and resubmit for approval. All previous history and notes, including the original purchase requisition (PR) number will be preserved.

- Requisitions can be returned at any point in the requisition approval process.
- When a requisition is returned it becomes a draft cart. It will be no longer visible as a requisition to other users and will be removed from the approver's workflow folder.
- Requisitioners will manage these returned requisitions as a draft cart in the section named 'My Returned Requisitions'.



- Approvers will see an indication of resubmitted requisitions in their approval queue.

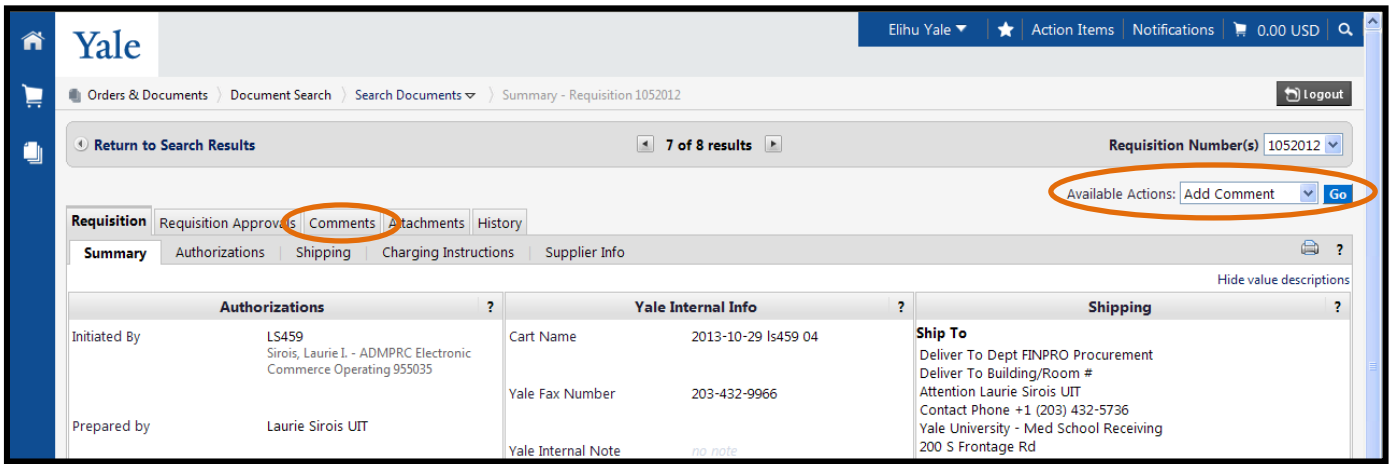


- All previous approval information and comments will be available in the History tab and the Requisition number will remain the same as the original.

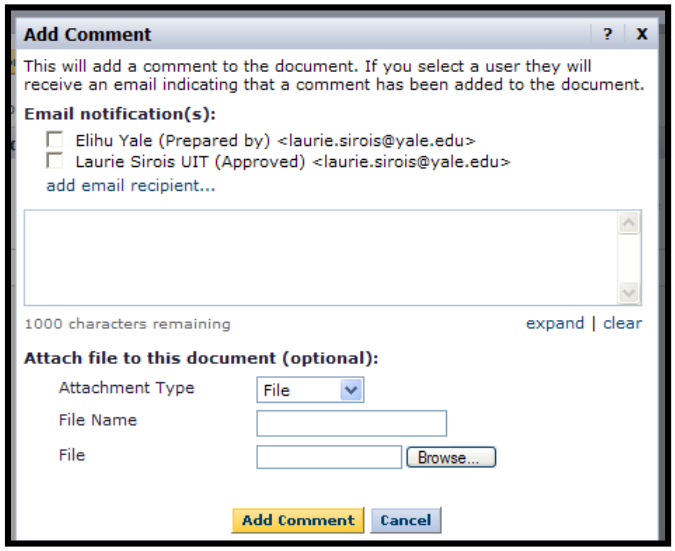
Add Comments

This feature provides the ability to add details or request information about an order. You can select who should be notified about the comment addition through an email notification.

The Add Comments option can be accessed via the Available Action drop down list and the Comments tab of the order.



When Add Comment is chosen, a pop-up window will appear. The name of the requisitioner and any approvers (if required) is automatically shown for the email notification option. Documents can also be attached and will be stored as internal attachments.



This feature can be used with both Purchase Requisitions and Purchase Orders at any time during the review/approval process or after the order has been completed.

Favorites

Overview

Folders:

- Personal favorites folder - for your access only.
- Shared favorites folder - share items with others. You can manage who has access to use items; who can add/delete items; and who can add others to the folder.

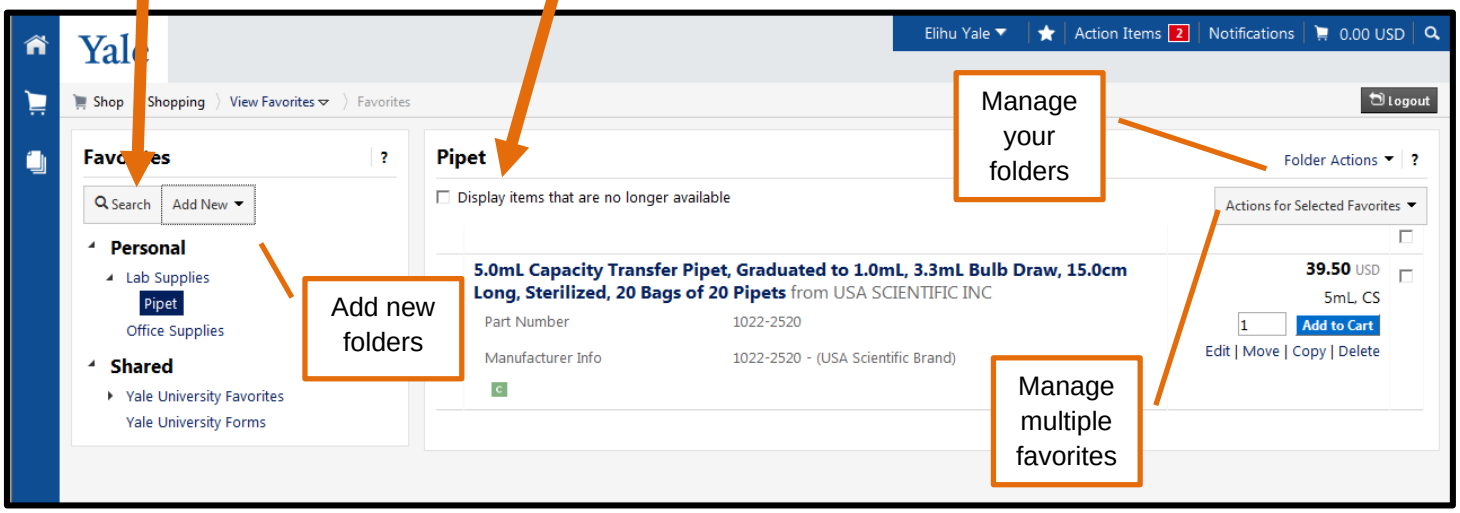
What can be added to favorites:

- Hosted Catalog items can be added to favorites. Prices will be automatically updated when the supplier makes any price changes.
- Non-Catalog Items can be added to favorites. Prices are NOT automatically updated. You will need to be sure the price is correct when ordering these items.
- External Catalog (PunchOut) cannot be added to favorites.

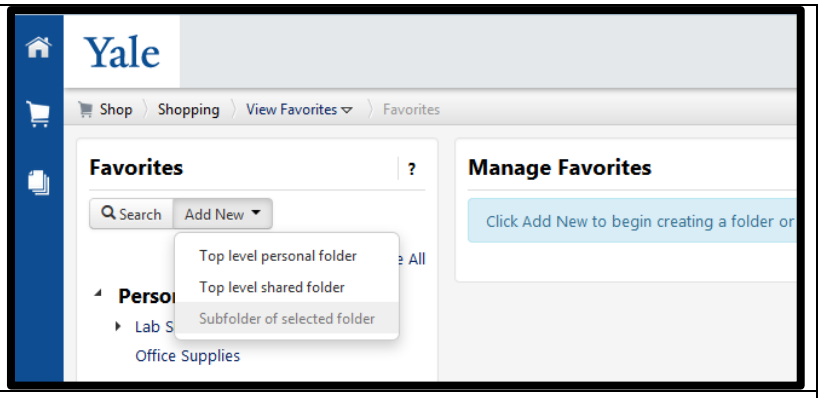
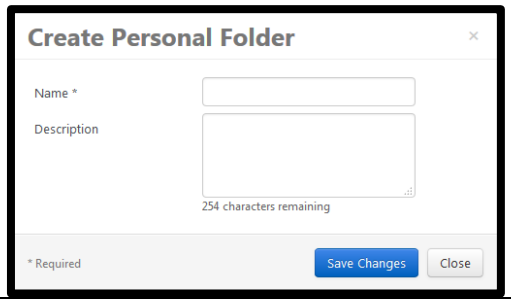
Navigation:

Use the search tool to locate a specific favorite

Choose to display, or not display, items that are no longer available



Create a Personal Favorites Folder

From the slide-out menu, Shop>Shopping>Click **View Favorites** on the Navigation Bar Click **Add New** Select **Top level personal folder**	
A pop-up window will appear Enter a name and description Click **Save Changes**	

Favorites

Add Items to a Favorites Folder

From Product Search

1. Once the item is identified in product search, click the '**add favorite**' link on the item
2. Review 'Item Nickname' and change if desired
3. Review Quantity and change if desired
4. Click on the name of the destination folder or create a new folder
5. Click **Submit** button
6. Click **Close** button

From a Shopping Cart

1. For an individual item, click **Add to Favorites** button on the line item
2. For multiple items, place a check in the box for each line item
3. And select Add to Favorites from the 'Perform an action on' dropdown list
4. Click **Go**
5. Review Item Nickname and change if desired
6. Review Quantity and change if desired
7. Click on the name of the destination folder or create a new folder
8. Click **Submit** button
9. Click **Close** button

From a Completed Order

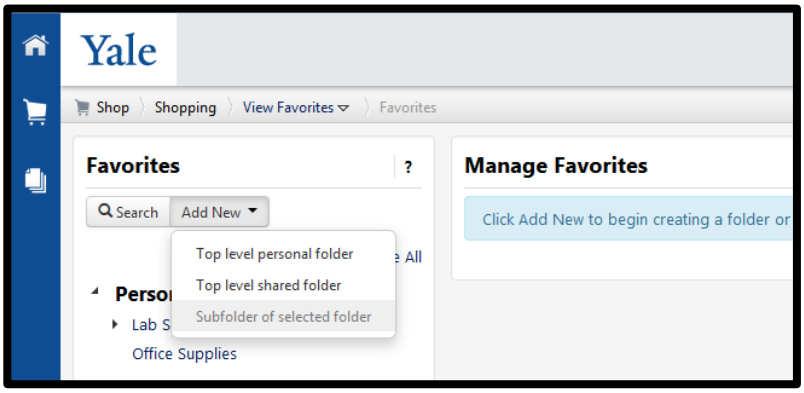
1. Open the purchase requisition
2. Place a check in the box for the desired line item(s)
3. From the 'For selected line items' drop down list choose 'Add to Favorites'
4. Click the **Go** button
5. Review Item Nickname and change if desired
6. Review Quantity and change if desired
7. Click on the name of the destination folder or create a new folder
8. Click **Submit** button
9. Click **Close** button

Create a Shared Favorites Folder

From the slide-out menu, Shop>Shopping>Click **View Favorites** on the Navigation Bar

Click **Add New**

Select **Top level shared folder**



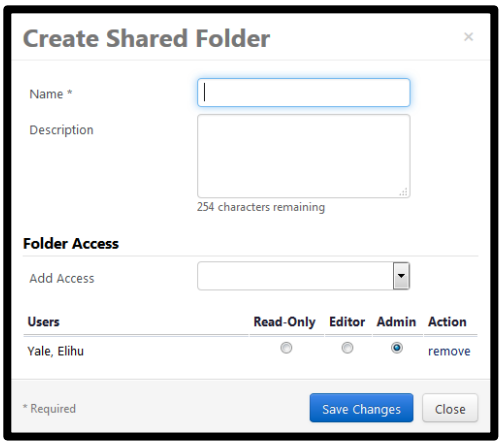
A pop-up window will appear.

Enter a **name** and **description**

You can give other users access now, or edit your folder at a later time.

You will see your name as a User with Admin access.

Click **Save Changes**



Below are definitions of the roles you can assign to the people who have access to your shared folder.

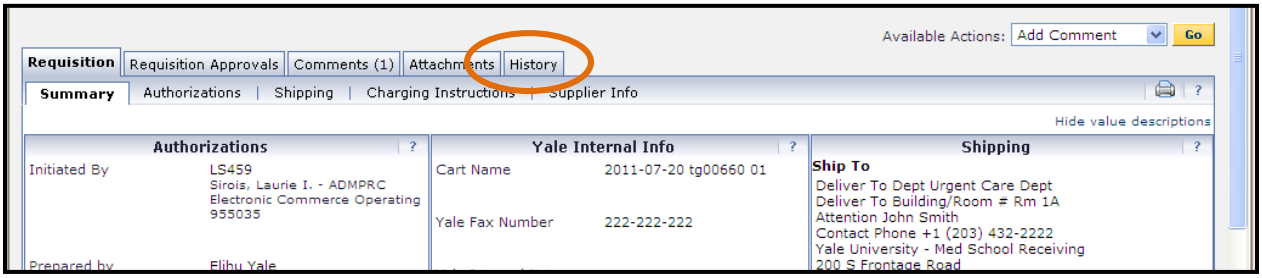
- **Read-only:** allows the user to shop in the folder only.
- **Editor:** allows the user to shop in the folder, add/remove sub-folders and/or items.
- **Admin:** allows the user to shop in the folder, add/remove sub-folders and/or items, as well as add/remove users to the folder.

History

Document History

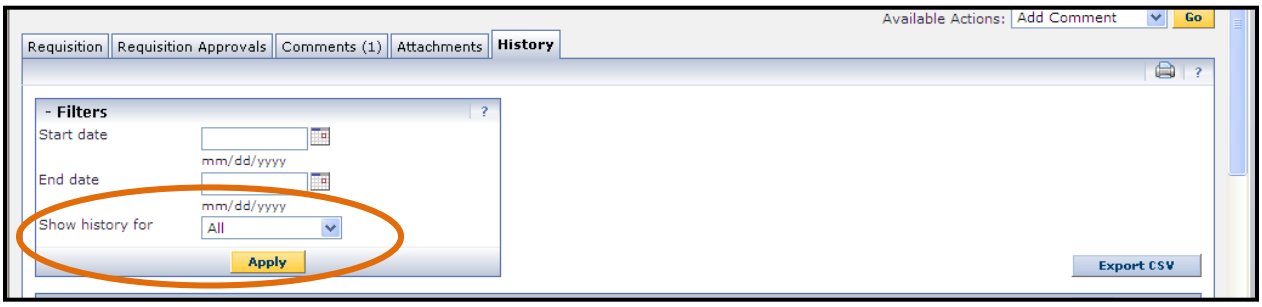
The purchase requisition (PR) and purchase order (PO) document each contain a history tab which records all actions taken on the document. A filter is available to view all comments and history in one location without having to toggle back and forth between the PR and PO.

From the PR, click the **History** tab



Click on **+Click to filter history**

From the Show history for drop down list, choose **All**, click **Apply**



Document History (continued)

All actions taken on the order both in the PR and PO will be displayed in the PR without having to toggle back and forth between the documents.

Results per page 20 | Records found: 22 | Page 1 of 2

Line No	Revision No.	Date/Time	User	Applies To	Step(s)	Action	Field Name	From	To	Note
	original	7/20/2011 10:18 AM	System	Purchase Order - SNP3016953		PO Approvals completed				
	original	7/20/2011 10:18 AM	System	Purchase Order - SNP3016953		PO Sent via CXML				0: Entry is demo. Will NOT transmit via cXML
	original	7/20/2011 10:17 AM	System	Purchase Order - SNP3016953		PO Revision Finalized				
	original	7/20/2011 10:17 AM	Corbin Parker	Purchase Order - SNP3016953	Purchasing Services	PO Approved				
	original	7/20/2011 10:17 AM	Corbin Parker	Purchase Order - SNP3016953	Purchasing Services	PO Assigned				
		7/20/2011 10:16 AM	System	Requisition - 607287		Requisition approval process completed				
		7/20/2011 10:16 AM	System	Requisition - 607287		Purchase requisition exported				
		7/20/2011 10:16 AM	System	Requisition - 607287	Create PO	PO Created	PO#: SNP3016953			
	original	7/20/2011 10:16 AM	System	Purchase Order - SNP3016953		PO created				
		7/20/2011 10:16 AM	Corbin Parker	Requisition - 607287	Purchasing Services	Requisition approved				
		7/20/2011 10:16 AM	Corbin Parker	Requisition - 607287	Purchasing Services	Requisition assigned				
		7/20/2011 10:15 AM	Laurie Sirois UIT	Requisition - 607287	Financial Approval	Requisition approved				
		7/20/2011 10:13 AM	Laurie Sirois UIT	Requisition - 607287		Comment Added				Expedited per your request
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition submitted				
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	Approved By	*empty*	Sirois UIT, Laurie	
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	Expenditure	*empty*	821200:50%, 821200:50%	
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	Expenditure:Split method	% of Price	% of Qty	
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	VIP	*empty*	VIP1625303:50%, VIP1625305:50%	
		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	VIP:Split method	% of Price	% of Qty	
Line 1		7/20/2011 10:12 AM	Elihu Yale	Requisition - 607287		Requisition modified	Quantity	26,000	2,600	

Document Search

What are documents? Prior to electronic systems, documents were on separate pieces of paper. In SciQuest, documents include purchase requisitions and purchase orders.

Important Features

Relative Date Ranges are available via a pull-down menu (e.g. last 30 days, last 60 days) when performing a document search. After the search results display, you can easily filter your search results by a different date range. Date range selection can happen four different ways: days, calendar year, fiscal year, other (custom).

Filter Options are available after performing your initial document search. With Document Search, post search filters allow you to define additional criteria for the search results. For example, if you perform a search for POs, you can narrow your results by a specific supplier. The filter options, which display on the left side of the search results, function similar to those in Product Search. These post filters look and act just like the post filters that are available with product search. Post filtering allows you to further narrow down your results.

Searches can be saved and executed at any time. Saved searches use relative date information (instead of static dates like history searches use). For example, if you save a search for all POs for the last 7 days, it will show exactly that, no matter what date it is executed. Saved searches are accessed through the Document Search tab, and are saved by name and description.

Searching by Custom Fields. You can search by Yale's custom field, the VIP number. Searching across documents by VIP is available as part of the advanced search. Additionally, you can now choose a span of values or a "starts with" option for custom fields.

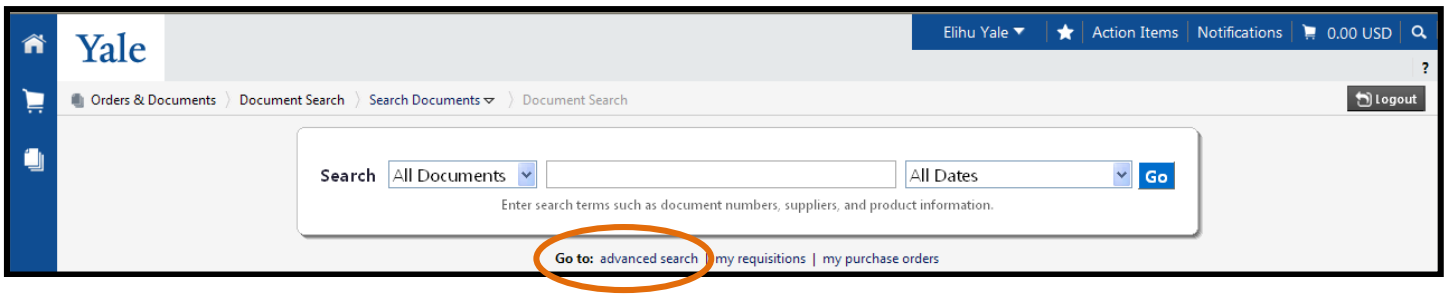
Document Search

Access

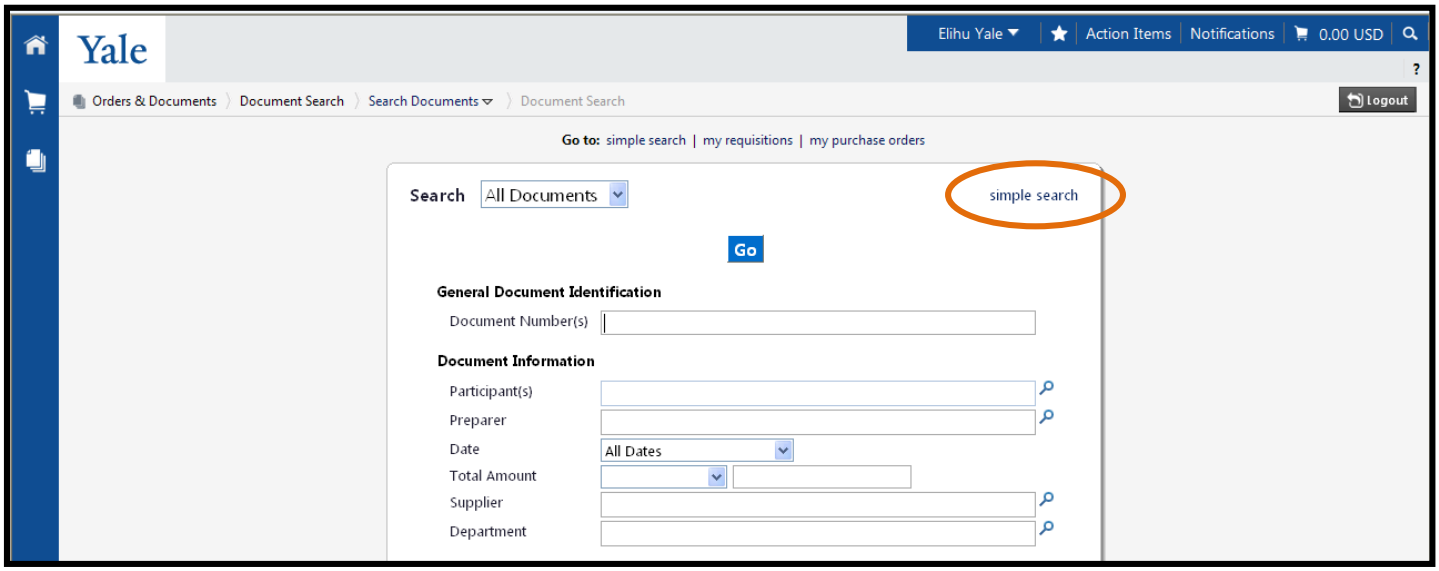
From Slide-Out Menu: **Orders & Documents > Document Search > Search Documents**

There are two methods for Document Search: Simple Search and Advanced Search (similar to product search)

Simple Search: The simple search screen contains a link to access advanced search



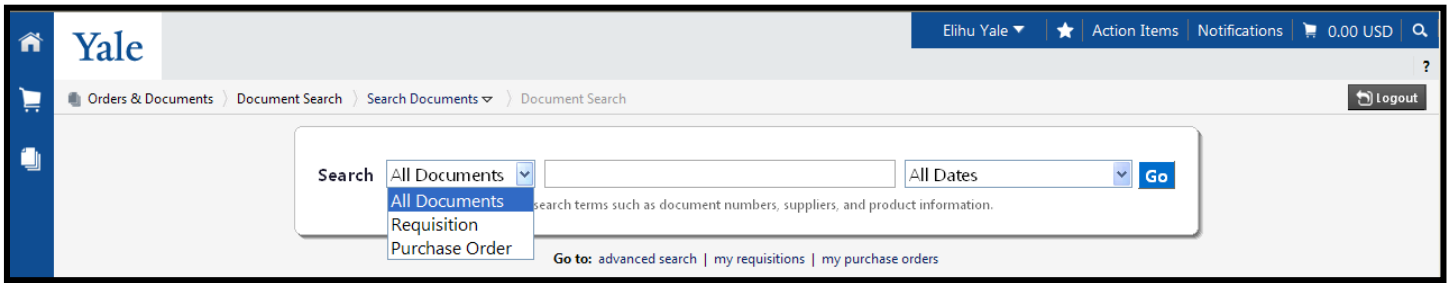
Advanced Search: The advanced search screen enables you to specify multiple criteria and contains a link to access simple search



Document Search

Simple vs Advanced Search

Simple Search



What type of documents do you want to search?
You can search across all documents or a specific document type: requisitions or purchase orders.

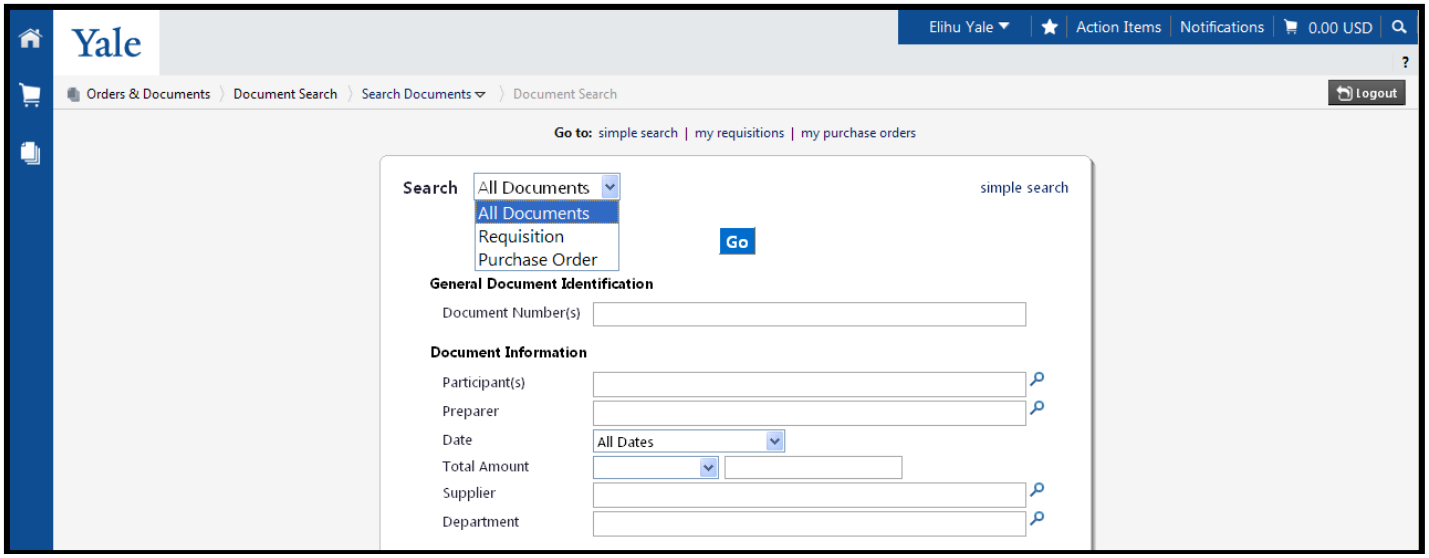
What are you looking for?

Enter search terms such as: requisition number, purchase order number, supplier name, catalog number, product information.

What dates do you need?

You can now select from relative date ranges, such as last 30 days, last 60 days, calendar year, fiscal year. Custom date ranges are also available.

Advanced Search



Advanced search offers you the ability to pre-define your search criteria. You can perform an advanced search across all documents or select a specific document type. You should use advanced search when you know the specific criteria you are looking for.

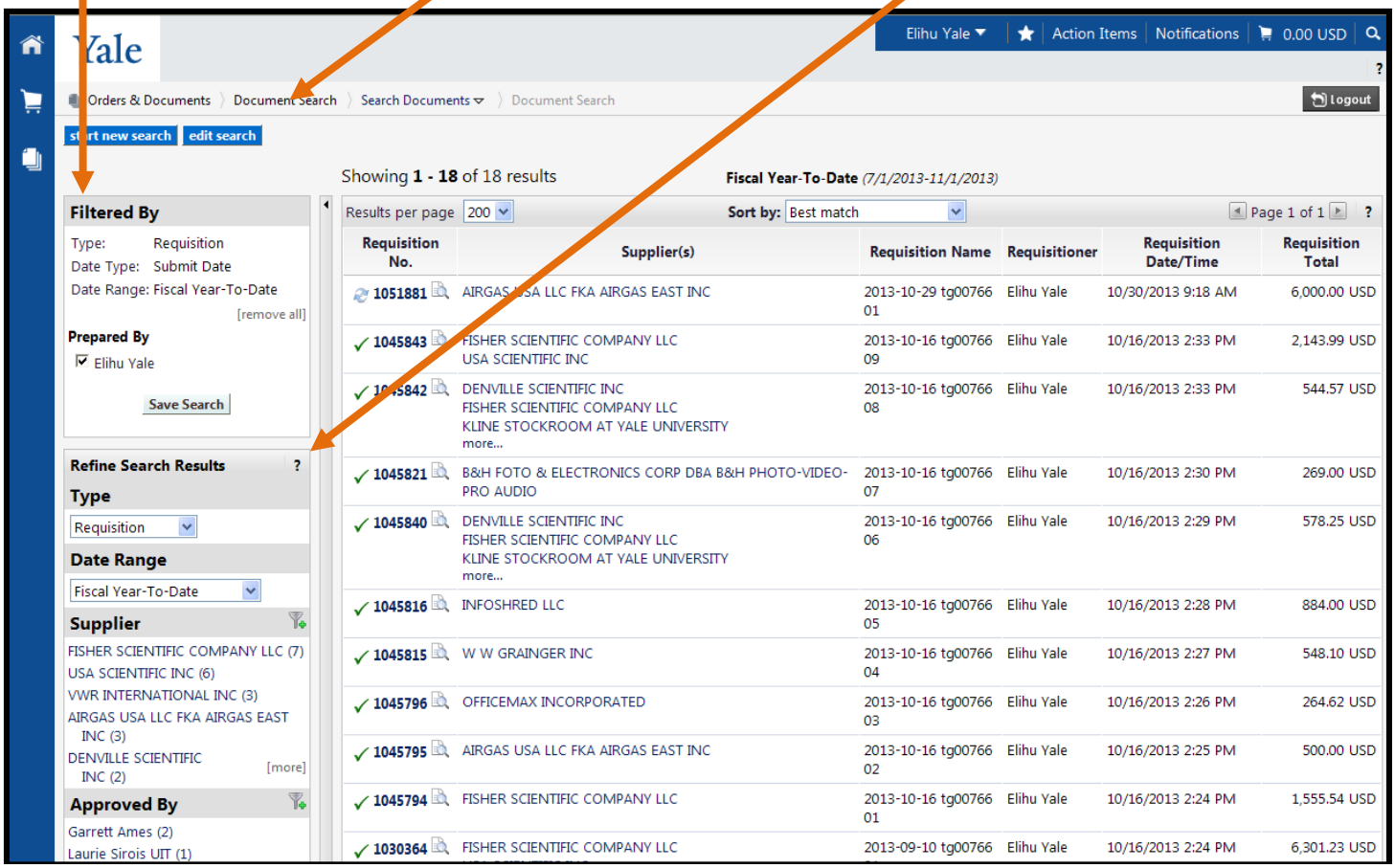
Document Search

Managing Search Results

When the search results display, the search criteria specified is shown here

Use these buttons to start a new search or edit the current search

Easily refine your search results by using the post search filters located in the Refine Search Results section



Document Search

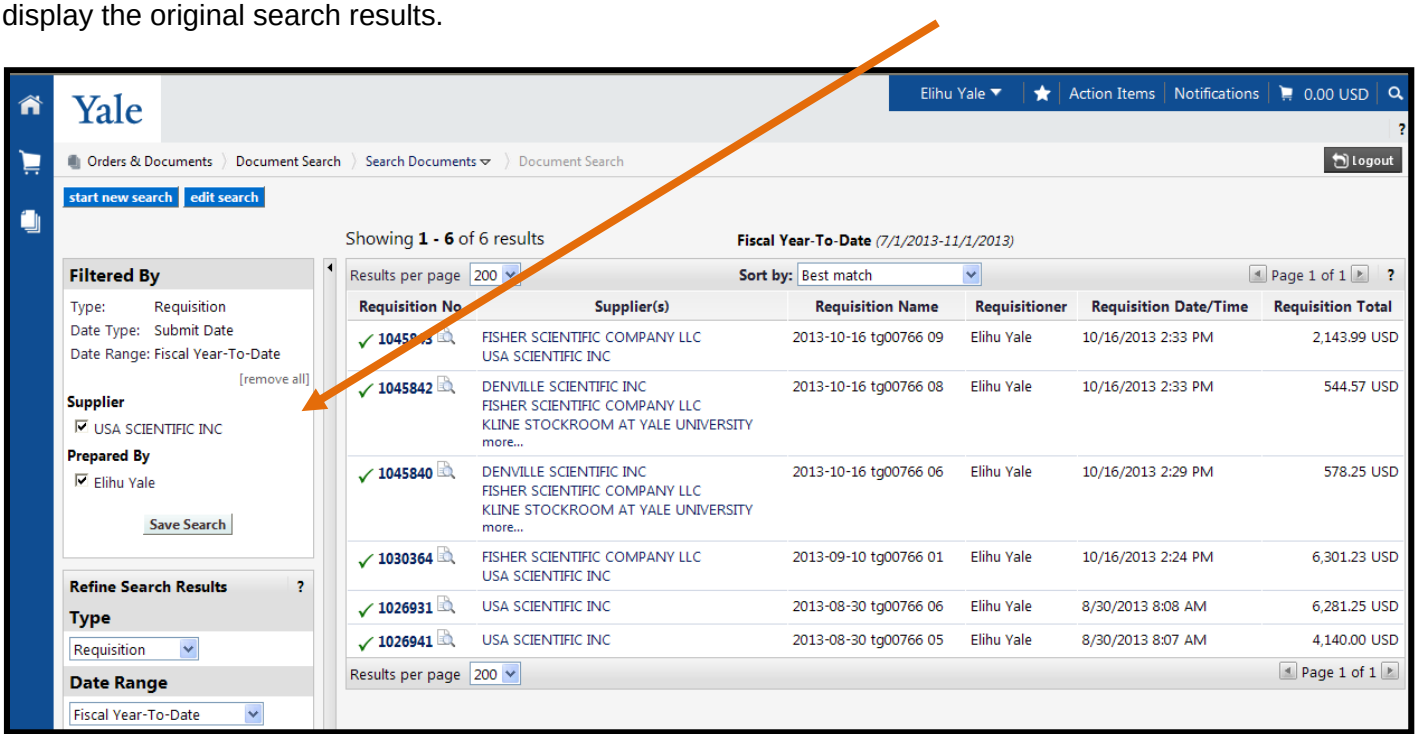
Post Search Filters

Each group in the Refine Search Results section contains values that match your search criteria. Click any of these values to display specific information. For example, a supplier name in the By Supplier section.

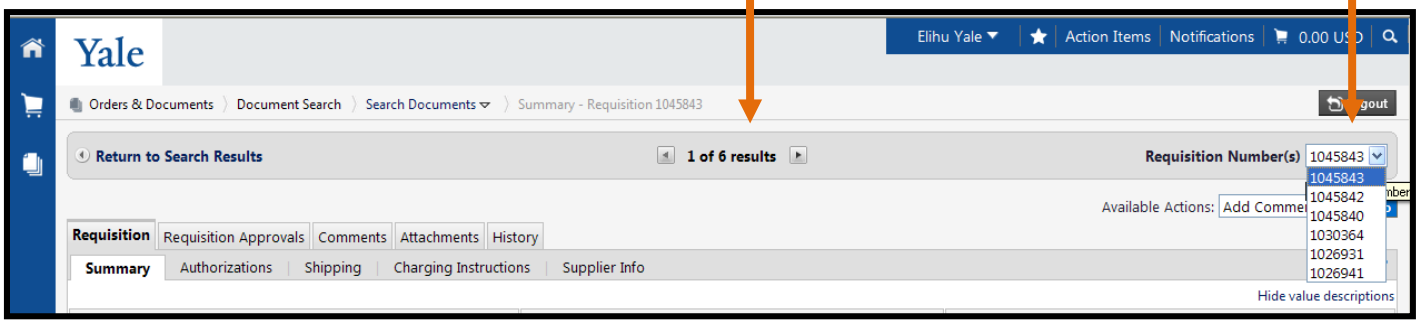
Or, click this symbol in any group(s) which opens a pop-up window allowing you to choose multiple values to display

Post Search Filters

To remove any post search filters applied, you can simply uncheck the box(es), or click the remove all link to display the original search results.



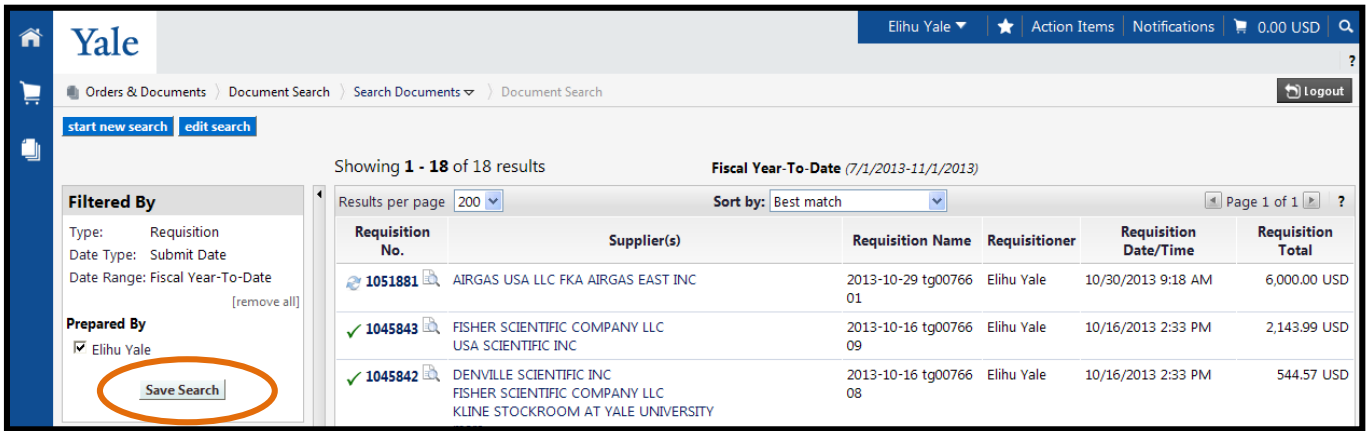
You can quickly review document details by using the arrows to move between documents or the drop down list to access a specific document



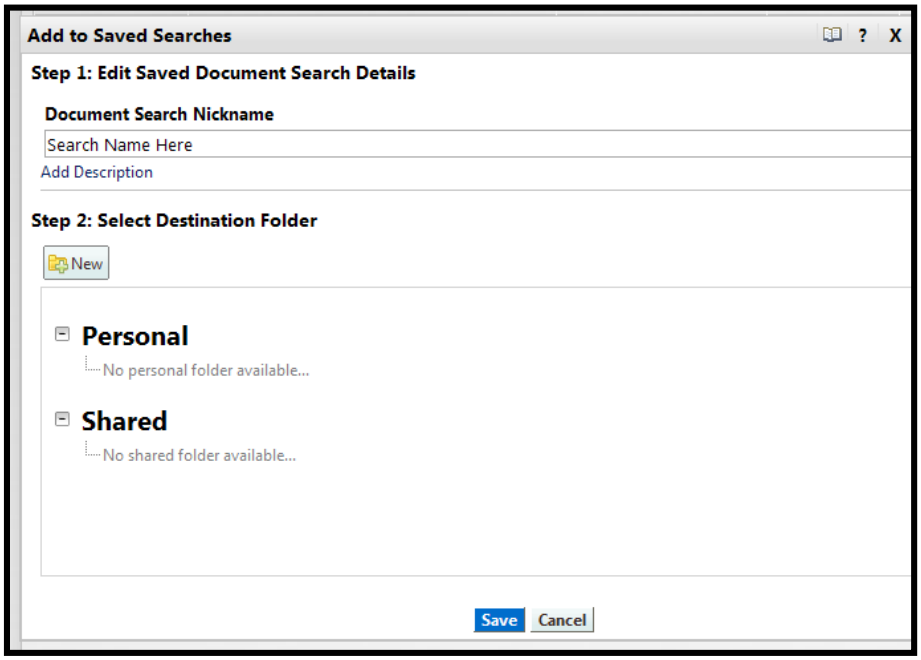
Document Search

Saved Searches

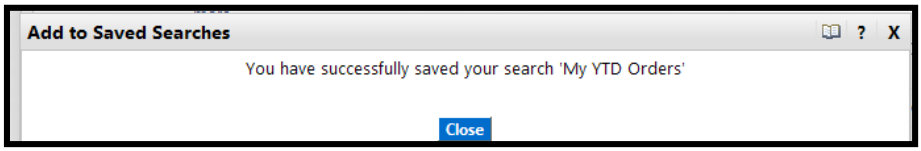
Click **Save Search** button.



Once the Save Search button is clicked, a pop-up window will appear. Here you can name the search and select the folder where you want the search saved. Click the **Save** button when done.



A pop-up window confirmation will be displayed.

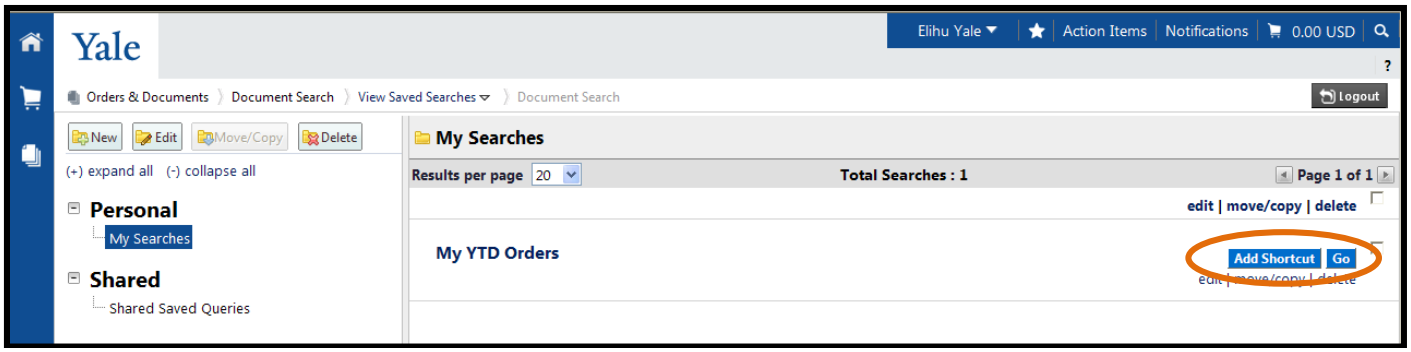


Document Search

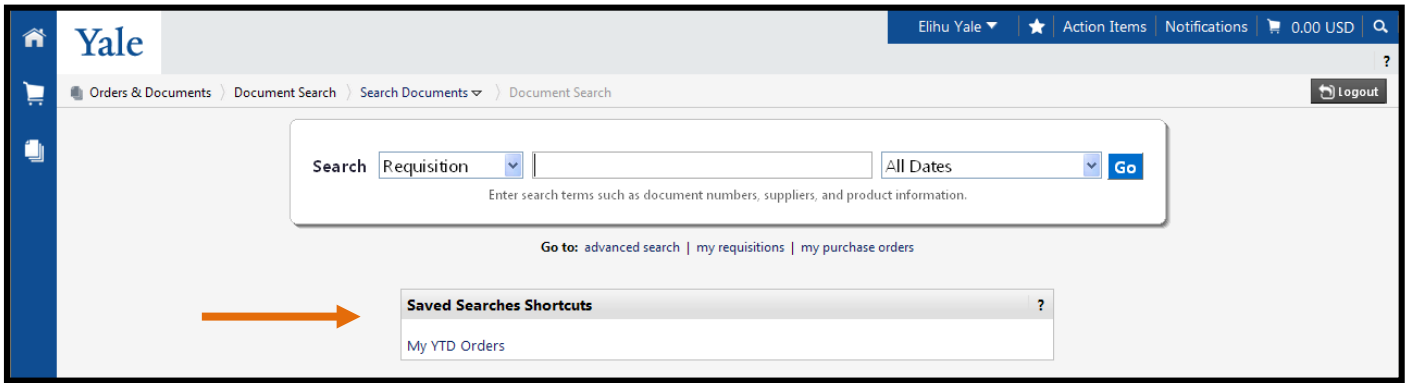
Saved Searches

From Slide-Out Menu: **Orders & Documents > Document Search > View Saved Searches**

To execute your search, click the **Go** button.



Use the **Add Shortcut** button for frequently used searches. Shortcuts will display below Simple or Advanced Search.



You can remove shortcuts by clicking the **Remove Shortcut** button.