



eProcurement User Guide

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LESSON 1: GETTING STARTED

System Overview

The eProcurement system provides the ability to procure goods and services* through an online system which includes approval functionality to process orders from requisition-to-purchase order. More specifically, eProcurement includes the following features:

- The capability to create, edit, submit, view, and approve electronic requisitions
- The capability to assign single or multiple account and center distributions to a requisition
- The capability to browse online catalogs, add items to a shopping cart, and populate a requisition with selected items
- The capability to maintain a user profile, which includes “Favorites” (i.e. - lists of frequently ordered items and frequently used accounts and centers)
- A process by which a completed requisition is submitted, Reviewers and Executors are assigned and the requisition is approved or rejected through workflow
- A user-specific worklist displaying current requisitions that require action
- The capability to search and find requisitions to determine their current status and take action on them if necessary
- Purchase order creation and dispatch to the vendor, which occurs via a third party fax service
- The capability to view and print requisitions, purchase orders, and departmental invoice reports

* Examples of services you can procure using eProcurement include repair/recalibration of equipment, printing, film developing, and delivery services.

Obtaining Security Access

To use eProcurement, you must be assigned one or more of the following roles on one or more centers or sumto centers:

Role Name	Capabilities within eProcurement
eProcurement Creator	Creates, saves, and submits requisitions
eProcurement Reviewer	Views, inputs comments on, and can agree or disagree with requisitions pending approval
eProcurement Executor	Views, inputs comments on, and can approve or reject requisitions pending approval
eProcurement Viewer	Views requisitions relevant to the centers on which he has been assigned this role
eDog Viewer	Views requisitions relevant to the centers to which he has authorization to view general ledger reports and data in eDog

To request access for one of the above mentioned roles, please visit the access portion of the eProcurement website located at the following URL:

<http://www.vanderbilt.edu/procurement/eprocurement/access1.shtml>



Tip: If you are unsure what (if any) eProcurement roles you currently have, access the web application STAR to search and view the security tree structure(s) and roles you are assigned. You can login to STAR at the following URL:

<https://webapp-a.mis.vanderbilt.edu/star/> or link easily to STAR by clicking the STAR link located in the eProcurement toolbar, as shown below:

Hardware and Software Requirements

The system will work on a PC or Macintosh capable of running an Internet browser. To achieve best results, it is recommend that you use a PC (Windows 95 or above) instead of a Macintosh. The minimum browser versions are Internet Explorer 6 or above and Netscape 4.7 or above. If using Netscape, version 7.0 or above is highly recommended. Additionally, java script should be turned on in your web browser.

Logging In

Logging in to the eProcurement system is different than the way you currently login to the other financial information systems such as eDog and WALDO. Instead of accessing a system-specific login page, you will login to eProcurement from the MIS Central Authentication site. Though you are only currently able to access eProcurement and STAR from the MIS Central Authentication site, in the future, you will be able to access other MIS-supported systems with a single login. In other words, after logging in once, you will be able to move between different MIS-supported applications without being asked for your VUnet ID and e-password by each one.

To login to MIS Central Authentication and access eProcurement:

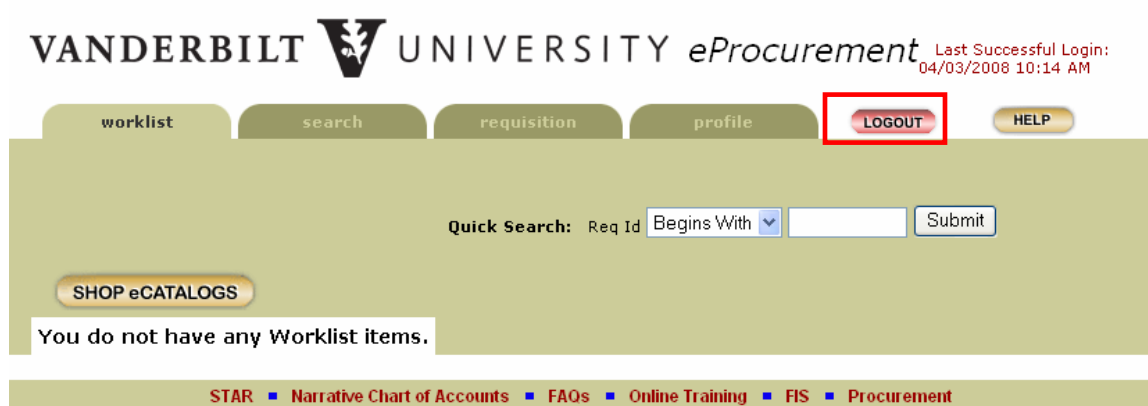
1. Open your internet browser and go to the following URL:
<https://webapp-a.mis.vanderbilt.edu/asap>. You will see the following screen:

2. Enter your VUnet ID and e-password and click the **Login** button.
3. The worklist tab is displayed by default. On this page, you will see requisitions that require action on your part. However, if you are logging in for the first time, your screen should appear as follows, an empty worklist:

Logging Out

To logout of eProcurement and the MIS Central Authentication site (a.k.a. Single Sign-on):

1. Click the **Logout** button displayed in the upper right-hand corner of the screen:



2. You will then see the following screen, confirming that you are logged out of the eProcurement system. You are then presented with the option to start a new eProcurement session or logout of Single Sign-on. Click on the link, **logout of Single Sign-on**.



3. Upon doing so, you will see a screen confirming the success of your logout of Single Sign-on.



Tip: Alternatively, you can logout of Single Sign-on (and eProcurement) by closing your web browser session.

Automatic Timeout

eProcurement automatic timeout occurs after 30 minutes of inactivity. If this occurs, any requisitions that you created but did not save or any changes made to a requisition since the last save will be lost. When you reengage the system, you will be brought back to the worklist screen – regardless of the screen you were previously on.

Likewise, linked vendors and the eCatalog contain timeouts that release your shopping cart contents when that time has expired. When purchasing items from multiple vendors, add each item to a requisition in eProcurement before continuing to shop. This way, your contents will be saved. (See lesson 4 for more details on shopping in the eCatalog.)

Navigation

There are four tabs - or menu items - displayed across the screen (“Worklist”, “Search”, “Requisition”, and “Profile”). The tabs appear dynamically, based on your role(s) in the eProcurement system. The functionality available within each tab is as follows:

Worklist: The “Worklist” tab entails a list of outstanding requisitions associated with an individual. More specifically, the worklist contains items that (1) are only pertinent to your role in eProcurement and (2) can have action taken on them by you. From the worklist, you can track the status of a requisition by actions such as Saved, Submitted, Re-Submitted, or Rejected as long as your name is attached to that requisition by virtue of a Creator, Executor, or Reviewer role.

Note: If you do not have the Creator, Executor, or Reviewer role you will not see this tab when you login to eProcurement.

Search: The “Search” tab allows you to perform advanced searches for specific requisitions. From this tab, you are able to search for a requisition by person, role, center, vendor, commodity, requisition ID, account, amount, status and submit date.

Note: All roles (Creator, Executor, Reviewer, eProcurement Viewer, and eDog Viewer) will see this tab when they login to eProcurement.

Requisition: The “Requisition” tab allows you to create and submit a purchase requisition with the completion of three screens: Requisition Line Items, Account & Center Distribution, and Requisition Header.

Note: If you do not have the Creator role, you will not see this tab when you login to eProcurement.

Profile: The “Profile” tab allows you create and maintain a User Profile of personal information, which the eProcurement system will add to any new requisitions you initiate. This is also where you maintain your “Favorites” (i.e. – lists of frequently ordered items and frequently used accounts and centers).

Note: If you do not have the Creator role, you will not see this tab when you login to eProcurement.

LESSON 2: CATALOG VS. NONCATALOG ITEMS

What is a catalog item?

If you are ordering from a vendor included in the eCatalog, eProcurement's multi-vendor marketplace, or from a vendor-specific catalog you can access from eProcurement, you will be ordering a catalog item. More specifically, you will complete the Requisition Line Items page by browsing a catalog (either the eCatalog or a vendor-specific catalog) and selecting your item(s). Upon checkout, the item(s) you selected will be returned to your requisition. All the information about the item(s) will be automatically populated.

Vanderbilt has pricing contracts with the vendors included in the eCatalog and with the vendors whose catalog is accessible from eProcurement. What is a pricing contract? For many of the most commonly ordered products and services, Procurement Services has negotiated contracts with preferred vendors. The vendors were awarded contracts on the basis of their competitiveness and ability to serve the needs of the entire Vanderbilt community. These contracts have deep discounts and special terms and conditions not generally available from non-contract or non-preferred vendors.

What vendors are included in the eCatalog?

AL Compressed Gas, American Paper & Twine, Amersham Biosciences, Continental Lab Products, Form Service Incorporated (FSI), Guy Brown, Interior Design Services (IDS), Invitrogen Corporation, Sarstedt Inc, Nashville Office Interiors, Bio Rad Laboratories, and Roche Diagnostics Corporation are currently included in the eCatalog. The eCatalog does not necessarily contain all of the items included in a vendor's catalog – just the items for which Vanderbilt has a pricing contract.

What vendor-specific catalogs are accessible from eProcurement?

The websites of Fisher Scientific, Guy Brown, Sigma Aldrich, and VWR Scientific are currently accessible from eProcurement.

What is a noncatalog item?

If you are ordering from a vendor whose catalog is not accessible from eProcurement or that is not included in the eCatalog, you will be ordering a noncatalog item and will complete the Requisition Line Items page by manually inputting all the information about the item. This includes Quantity, Unit of Measure (UOM), Item Number, Unit Price, Item Description, Commodity, and Vendor. The source for this information could be a hard copy of the vendor's catalog or the vendor's website.



Tip: To request a vendor be added to eProcurement, please complete the Vendor Addition Request Form, which is accessible at the following URL:

http://www.vanderbilt.edu/procurement/eprocurement/vendor_request.php

LESSON 3: SHOPPING FOR A NONCATALOG ITEM

Creating a requisition entails the completion of three pages: the Requisition Line Items page, the Account & Center Distribution page, and the Requisition Header page. Instruction on how to complete each page is included below:

Completing the Requisition Line Items Page

From the Requisition Tab, you can add noncatalog items, catalog items, or both noncatalog and catalog items to a requisition. In the example below, we will walk through how to add a noncatalog item to a requisition. Adding catalog items to a requisition will be addressed later in this guide, in Lesson 4 “Shopping From the eCatalog” and in Lesson 5 “Shopping from a Vendor-Specific Catalog.”

1. Enter the Quantity of the item you want to purchase, as illustrated on the following screen:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 04/03/2008 10:14 AM

worklist search requisition profile LOGOUT HELP

Requisition Line Items

* Qty: 1 * UOM: Select Unit of Measure Item Number: * Unit Price: Ext Amount: REMOVE ADD

* Item Description: * Commodity: Select Commodity Code

* Vendor: Vendor Unknown vendor lookup

Add to Favorites

* Required field

SHOP eCATALOGS FAVORITES SAVE CONTINUE

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2. Select the UOM (Unit of Measure) for the item from the dropdown menu, as illustrated on the following screen:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 04/03/2008 10:14 AM

worklist search requisition profile LOGOUT HELP

Requisition Line Items

* Qty: 1 * UOM: EA - Each Item Number: * Unit Price: Ext Amount: REMOVE ADD

* Item Description: * Commodity: Select Commodity Code

* Vendor: Vendor Unknown vendor lookup

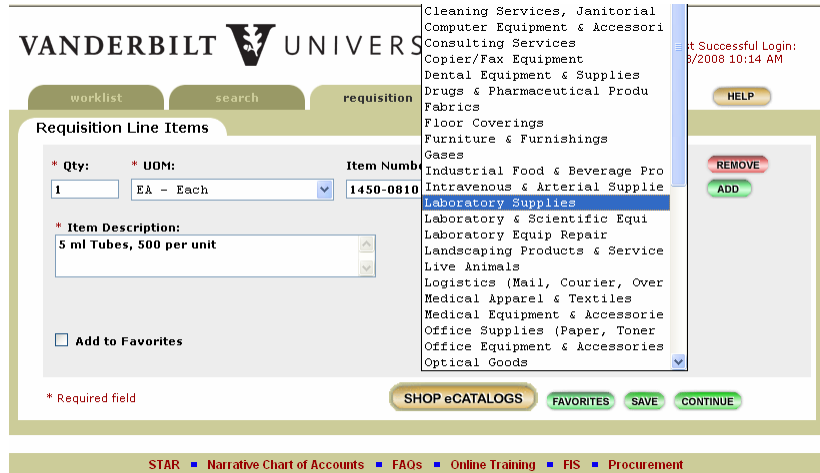
Add to Favorites

* Required field

SHOP eCATALOGS FAVORITES SAVE CONTINUE

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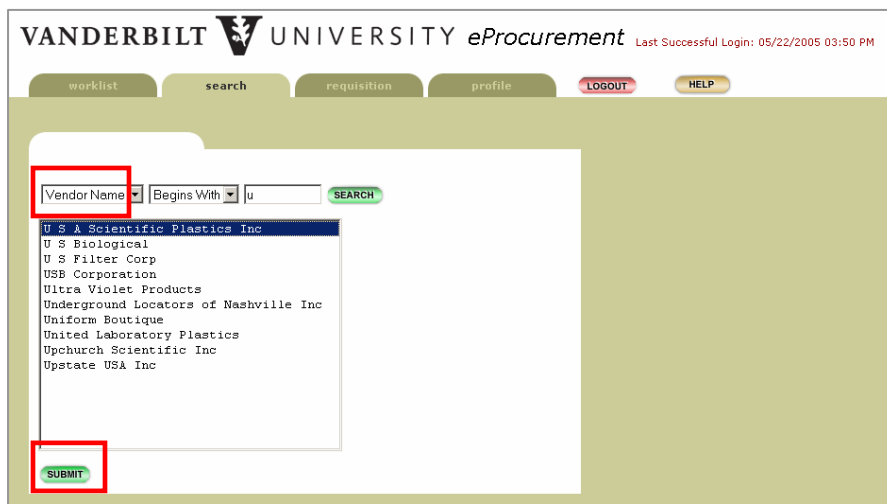
3. Enter the Item number, Unit Price, and Item Description.
4. Select the appropriate Commodity Code for the item from the dropdown menu, as illustrated on the following screen:



5. Specify the Vendor. To do so, you must select the vendor from a list of vendors designated for use in the eProcurement system. To access this list, click the **Vendor Lookup** link which is located directed below the vendor dropdown box. The location of the link is illustrated on the following screen:

*Note: Upon clicking the Vendor Lookup button, eProcurement displays a list of the first 250 vendors available for use in the system. To view the additional vendors, use the search tool located above the vendor listing. You can search for a vendor by Vendor Name or Vendor ID using the qualifiers Begins With, Equals or Contains. Once you specify your search parameters, click the **Search** button.*

6. Choose your vendor from the list by clicking on the vendor name and then the **Submit** button, as illustrated below:



- If we were finished adding items to this requisition, we would click the Continue button. However, in this example, we want to order an additional item from a different vendor. To do so, click the **Add** button to add another requisition line. The location of the **Add** button is shown on the following screen:



Tip: You can also remove line items using the **Remove** button located adjacent to the **Add** button.

- After clicking the **Add** button, repeat Steps 1-6.

Note: After selecting the additional vendor from the Vendor Lookup page, the second vendor name will be added to the vendor dropdown box. You would then select that vendor from the dropdown box.

- After all requisition line items are complete click the **Continue** button, shown below:



Tip: If you are in the middle of a requisition and need to save your work, click the **Save** button located next to the **Continue** button.

Completing the Account & Center Distribution Page

The next step in completing your requisition is to add valid account and center distributions. As you can see in the following screen, the Account and Center Distribution page is divided into two primary sections: Default Distribution and Line Item Distribution.

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 09/05/2005 09:09 PM

worklist search requisition profile LOGOUT HELP

Return to Requisition ID: E000006220

DEFAULT DISTRIBUTION

*Account *Center Slid Slac *Method Amount Percent

amount 113.97

ADD APPLY

ACCOUNTCENTER LOOKUP

Total Amount: \$113.97

LINE ITEM DISTRIBUTION

Item Number	Item Description	Unit Price	Qty	UDM	Ext Amount
1450-0010	5 ml Tubes, 500 per unit	\$61.77	1	EA	\$61.77
R05258	MSE I Restriction Enzyme, 500 Units	\$52.20	1	EA	\$52.20

*Account *Center Slid Slac *Method Amount Qty Percent

amount 61.77

ADD

ACCOUNTCENTER LOOKUP

* Required field

SAVE CONTINUE

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Tip: If you are working on a requisition that consists of a single distribution line, it is most efficient to input the required information within the “Line Item Distribution” section of the screen and then click the **Continue** button. This strategy will result in the fewest number of mouse clicks.



Tip: If you are working on a requisition that consists of multiple distribution lines, it is most efficient to input the required information within the “Default Distribution” section of the screen. Once you input the required information and click the **Apply** button, the account and center you entered will be distributed across all lines of your requisition. From there you can edit the individual lines, if necessary.

Let's proceed with our example and enter the account and center within the Default Distribution section of the screen.

1. Enter the appropriate five-digit account number, as illustrated on the screen below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 09/05/2005 09:09 PM

worklist search requisition profile LOGOUT HELP

DEFAULT DISTRIBUTION [Return to Requisition ID: E000006220](#)

*Account *Center Slid Slac *Method Amount Percent
 60150 [] [] [] [] amount 113.97 ADD APPLY
 ACCOUNTCENTER LOOKUP
 Total Amount: \$113.97

LINE ITEM DISTRIBUTION

Item Number	Item Description	Unit Price	Qty	UOM	Ext Amount
1450-0810	5 ml Tubes, 500 per unit	\$61.77	1	EA	\$61.77
*Account *Center Slid Slac *Method Amount Qty Percent					
[] [] [] [] amount	61.77	[]	[]	[]	ADD
ACCOUNTCENTER LOOKUP					
Item Number	Item Description	Unit Price	Qty	UOM	Ext Amount
R05258	MSE I Restriction Enzyme, 500 Units	\$52.20	1	EA	\$52.20
*Account *Center Slid Slac *Method Amount Qty Percent					
[] [] [] [] amount	52.20	[]	[]	[]	ADD
ACCOUNTCENTER LOOKUP					

* Required field SAVE CONTINUE

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Tip: If you don't know which account to use, click on the **Account/Center Lookup** button, which is located directly beneath the field where you enter the account number. This will bring you to a searchable list of accounts permissible for use in the eProcurement system.

Note: Capital accounts (74000 to 74099) are available for use in eProcurement with all University Central cost centers and with unrestricted cost centers in the Schools of Medicine and Nursing. When using a capital account, eProcurement will assign your requisition a requisition type of "CAP" for capital. If you use any other account, eProcurement will assign your requisition a requisition type of "GEN" for general.

2. Enter your ten-digit Center number and, if applicable, Subledger ID (Slid) and Subledger account (Slac), as shown below:

Note: A Subledger ID is a single character code used with all interfaces between the general ledger and subsystems such as the Accounts Receivable and Work Order systems. A Subledger account is the unique identifier within the subsystem.

3. Click the **Apply** button. As you can see in the screen below, this distributes the information across all lines of the requisition:

4.

- Click the **Continue** button in the lower right-hand corner of the screen to proceed to the next page, the Requisition Header.

Adding Multiple Distribution Lines

If a situation arises in which you want to distribute the entire order or an individual line item across multiple accounts and/or centers, you can add distribution lines by clicking the **Add** button associated with the line item. You can distribute the entire order across multiple accounts and/or centers by amount or percent. You can distribute an individual line item across multiple accounts and/or centers by amount, percent, or quantity.



Tip: If you were to change your mind and decide to remove the distribution line, you could do so by clicking the **Remove** button located next to the **Add** button.



Tip: If you are in the middle of a requisition and need to save your work, click the **Save** button located next to the **Continue** button.

Completing the Requisition Header Page

The final step in completing your requisition is to provide the requisition header information.

- As you can see on the screen below, some of the requisition header information has been automatically populated by the system, including Creator Name, Requisition Date, Requisition ID, Requisition Type, Due Date, Attention field, Vendor, and Vendor Location. Verify that this information is correct and make any changes (if applicable).

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 09/05/2005 09:09 PM

worklist search **requisition** profile LOGOUT HELP

Requisition Header [Return to Requisition ID: E000006220](#)

Creator Name: **Getsay, Jennifer K** Requisition Date: **Sep 5, 2005** Requisition ID: **E000006220** Requisition Type: **GEN**

Buyer: Jenkins, Tamena *Due Date:

*Ship to:

Attn: **Getsay, Jennifer K**

*Dept:

*Room:

Name Phone Email

VU Contact:

Comment for Vendor:

Internal Comment:

Vendor: **U S A Scientific Plastics Inc**
 Location: **346 Southwest 57th Ave, Ocala, FL 34474**
 Name Phone Date (mm/dd/yyyy)

Vendor Contact:

Vendor: **Applied Biosystems**
 Location: **850 Lincoln Centre Drive, San Mateo, CA 94404**
 Name Phone Date (mm/dd/yyyy)

Vendor Contact:

* Required field

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- Next, complete the Ship-to field by inputting the appropriate Ship to ID. The Ship to ID is a required field that identifies the building where you want your order to be shipped. This is a different value than the Department Routing Code, which eProcurement does not use. If you do not know which Ship to ID to choose, you can click the green **Search** button located next to the Ship to field to access a searchable list of Ship-to IDs. Upon doing so, you would see the following screen:

Shipto Id	Address
EG2	1202 18th Avenue South
SO7	1207 17th Avenue South
EO7	1207 18th Avenue South
EO8	1208 18th Avenue South
E11	1211 18th Avenue South
WIN	1397 South College Street
TER	2015 Terrace Place
B20	2120 Belcourt Avenue
B46	2146 Belcourt Avenue
B47	2147 Belcourt Avenue
25WE	2525 West End Avenue
W11	2611 West End Avenue
WQ1	3401 West End Avenue
ACTC	Aids Clinical Trails Center
ALH	Alumni Hall

To select a Ship-to ID from this list, click on it and then click the **Submit** button.

- Finally, enter the Department Name, Room Number, VU Contact Information (optional), Comment for Vendor (optional), Internal Comment (optional), and Vendor Contact Information (optional).



Tip: In addition to the VU Contact and Vendor Contact fields, notes made in the Comment for Vendor field will be displayed on the purchase order that the vendor receives.

- Once the Requisition Header information is complete, click on the **Continue** button in the lower right-hand corner of the screen.

Editing, Printing, Submitting or Deleting a Requisition

Once the Requisition Header has been completed, you will see the following screen.:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 09/05/2005 09:09 PM

worklist search requisition profile LOGOUT HELP

Requisition EDIT ITEMS eCatalog SHOP EDIT DISTRIBUTION EDIT HEADER PRINT

Req Id: E000006220 Req Date: Sep 5, 2005 Status: Saved
 Creator: Getsay, Jennifer K Buyer: Jenkins, Tamena Req Type: GEN
 Due Date: Sep 12, 2005 Total Amount: \$113.97
 Ship To: Vanderbilt University
 Getsay, Jennifer K Accounting Office
 1104 Baker Building
 110 21st Avenue South
 Nashville, TN 37203

Status:
 Purchase Order #: PO Date: Vendor: U S A Scientific Plastics Inc
 Contact: Contact Phone: Contact Date:
 Status:
 Purchase Order #: PO Date: Vendor: Applied Biosystems
 Contact: Contact Phone: Contact Date:

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UOM	Price	Ext Amount
1	U S A Scientific Plastics Inc	1450-0810	5 ml Tubes, 500 per unit		41120000	1	EA	\$61.77	\$61.77
	Account	Center	SLID	SLAC	Amount				
	60150	1551100000			\$61.77				
2	Applied Biosystems	R05258	MSE I Restriction Enzyme, 500 Units		41120000	1	EA	\$52.20	\$52.20
	Account	Center	SLID	SLAC	Amount				
	60150	1551100000			\$52.20				

Approvers

Role	Center	Name	Date	Approval
EXECUTOR	1551100000	Clark, Phyllis A		
EXECUTOR	1551100000	Parish, Anna L		
EXECUTOR	1551100000	Price, Betty L		
EXECUTOR	1551100000	Walker, Kevin R		

Creator: SUBMIT DELETE

From this page, you can Edit, Print, Submit or Delete the requisition. Explanations of how to complete these actions are provided below:

- **Edit:** If you want to make changes, click one of the edit buttons at the top of the screen (**Edit Items**, **Edit Distribution** or **Edit Header**) and continue through the previously described processes.
- **Print:** If you want a printer-friendly copy of your requisition, click the **Print** button at the top of the screen. The requisition will be displayed as a .PDF file and may be printed, or saved and e-mailed to someone else.

*Note: You are able to print your requisition at any time during the requisition creation process. The printer-friendly copy of your requisition becomes available within 5 to 10 minutes after your last Save. If you click the **Print** button and your most recently saved changes are not displayed, please allow additional time, then click the **Print** button again.*

- **Submit:** If there are no changes, click the **Submit** button in the lower left-hand corner of the screen.
- **Delete:** If you decide the requisition is no longer relevant and want to delete it, before sending it through workflow for approval, you can click the **Delete** button to take it off your worklist.

*Note: If you delete a requisition, it will no longer be available in the eProcurement system. In other words, the requisition will be permanently removed from your worklist. Thus, as a safeguard, when you click the **Delete** button, the system will ask you to confirm that you do indeed want to delete the requisition by prompting you to click the **Delete** button again.*

Assignment of Reviewers and Executors

Note the Approvers that have been assigned to the requisition displayed above. Before you submit the requisition, you have the opportunity to review the names of the Reviewer(s) and Executor(s) to whom your requisition will be routed. The system assigns these approvers based on who has eProcurement approval authority for the particular center(s) and dollar amount(s) on your requisition. In some cases, the Reviewer and/or Executor will be the same person that created the requisition. In other cases, the Reviewer and/or Executor will be a different person. If there is not an Executor directly assigned at the center and with the appropriate dollar authority, the eProcurement system will search up the hierarchy of center numbers until it finds an Executor who can approve your requisition.

Once you submit a requisition, it is routed electronically to these Reviewer(s) and Executor(s) and it appears in their worklist(s). Though multiple Executors may be listed for a single center number, only one of them needs to approve your requisition. Once one does, a purchase order will be generated and faxed to the vendor.

Note: If the total amount of noncatalog items on a requisition is greater than \$1,000, the requisition will be routed to a Buyer (a.k.a. purchasing agent) in Procurement Services for approval after the Executor has approved it.

LESSON 4: SHOPPING FROM THE eCATALOG

In Lesson 3 “Shopping for a Noncatalog Item,” you learned how to complete the Requisition Line Items page by adding noncatalog items. In this section of the guide, you will learn how to shop for catalog items from the eCatalog and add items to the Requisition Line Items page. Once you have added catalog items to the Requisition Line Items page, you would proceed to the Account and Center Distribution and Requisition Header pages, as explained in Lesson 3, “Shopping for a Noncatalog Item.”

Accessing the eCatalog

To access the eCatalog, go to the Requisition Tab and click the **Shop eCatalogs** button, as illustrated below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 03/10/2008 08:34 AM

worklist search requisition profile LOGOUT HELP

Requisition Line Items

* Qty: * UOM: Item Number: * Unit Price: Ext Amount: REMOVE
Select Unit of Measure ADD

* Item Description: * Commodity: Select Commodity Code
* Vendor: Vendor Unknown vendor lookup

Add to Favorites

* Required field SHOP eCATALOGS FAVORITES SAVE CONTINUE

STAR ■ Narrative Chart of Accounts ■ FAQs ■ Online Training ■ FIS ■ Procurement



Tip: The eCatalog is also accessible from your worklist.

After clicking the **Shop eCatalogs** button, you will see the central screen of the eCatalog, the following page provides easy access to all the items available in the eCatalog:

Home Furniture Maintenance (MRO) Office / Forms Research Favorites External Help Search Keyword Add

Back | Home | All Groups Cart | Checkout

Furniture
Furniture & Furnishings (157)

Maintenance (MRO)
Apparel & Luggage & Personal Care Products (2)
Cleaning Equipment & Supplies (410)
Power Generation & Distribution Machines & Accessories (42)
Tools & General Machines (1)

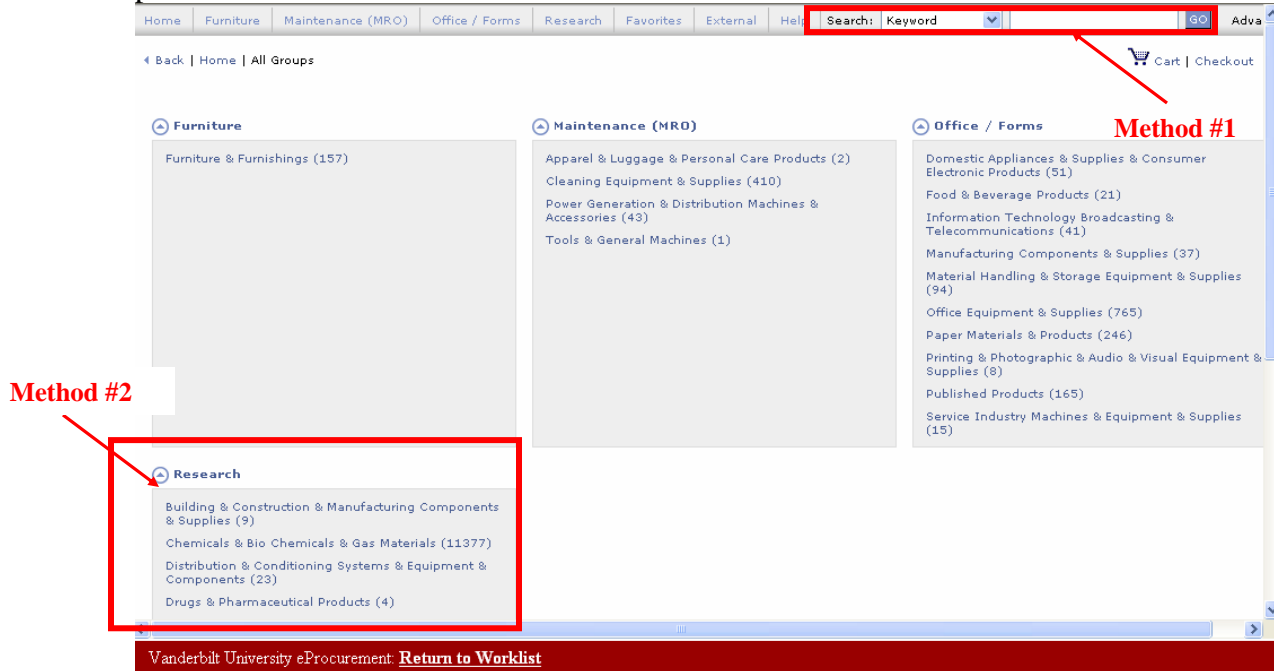
Office / Forms
Domestic Appliances & Supplies & Consumer Electronic Products (51)
Food & Beverage Products (21)
Information Technology Broadcasting & Telecommunications (41)
Manufacturing Components & Supplies (37)
Material Handling & Storage Equipment & Supplies (94)
Office Equipment & Supplies (745)
Paper Materials & Products (246)
Printing & Photographic & Audio & Visual Equipment & Supplies (8)
Published Products (145)
Service Industry Machines & Equipment & Supplies (15)

Research
Building & Construction & Manufacturing Components & Supplies (5)
Chemicals & Bio Chemicals & Gas Materials (11377)
Distribution & Conditioning Systems & Equipment & Components (23)
Drugs & Pharmaceutical Products (4)

Vanderbilt University eProcurement Return to Worklist

Searching the eCatalog for Items

From the Category Selections page, you can locate items in the eCatalog using one of two possible methods:

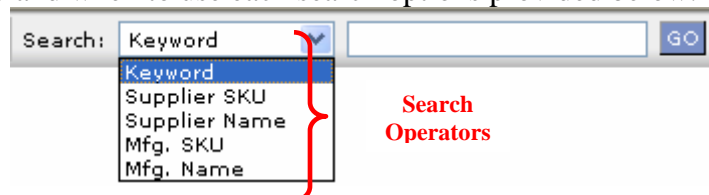


1. Use the “Search” option to quickly search for an item across product categories and subcategories by entering a keyword or group of keywords. This includes item number, item description, vendor name, etc. The search engine is located on the right side of the page.
2. Select a category from the eCatalog main page by drilling down through subcategories until you find the item you want to purchase. Category and subcategory refer to the groups and subgroups used to organize the available items. The number of items in each category appears in parentheses next to the category.

The “Search” option is the most efficient and therefore recommended method with which to locate items in the catalog. Thus, this guide will focus on how to use the search engine on the Category Selections page:

First, determine how you will search for a product: by keyword, supplier SKU, Supplier Name, Mfg. SKU, or Mfg. Name.

Instruction on how and when to use each search options provided below:



- a. **Keyword:**
Use a word or phrase as your search criterion for finding the item you need.
- b. **Supplier SKU:**
Use this option to search by the stock keeping unit (SKU) provided by the retail vendor.
- c. **Supplier Name**
Use this option to search by the name of the retail vendor.
- d. **Mfg. SKU:**
Use this option to search by the stock keeping unit (SKU) provided by the supplier or manufacturer.
- e. **Mfg. Name**
Use this option to search by the name of the supplier or manufacturer as opposed to the name of the retail vendor.



Tip: If there are more than 200 items that match the search criteria you entered, the system will only return the first 200. In this case, you would need to refine your search criteria to make it more specific.

Viewing Your Search Results

After you have entered the keyword(s) you want to search on and clicked **Go**, your search results will be displayed on a split screen, as shown below:

Note: In this example, we searched by keyword “broom.”

The screenshot shows a web application interface with a navigation menu at the top (Home, Furniture, Maintenance (MRO), Office / Forms, Research, Favorites, External, Help) and a search bar containing the word 'Keyword'. Below the search bar, there are links for 'Back | Home | Search Results For : All Words ('broom')' and 'Cart | Checkout'. The main content area includes sections for 'Browse Matching Categories' and 'Refine Results By Category'. Below these, there is a 'With Selected:' section showing a shopping cart icon and a star icon. The main display is a table with the following data:

	Actions	SKU	Product Description	Supplier Name	Unit	Cost
<input type="checkbox"/> Product Image	Qty: 1 	166702	31260 60" THRD HNDL-MTL TIP	American Paper & Twine	Each	1.72 US
<input type="checkbox"/> Product Image	Qty: 1 	171518	61-J28B (D-450) JANITOR BROOM	American Paper & Twine	Each	5.33 US
<input type="checkbox"/> Product Image	Qty: 1 	172205	61-H24 (D-101) HOUSEKEEP BROOM	American Paper & Twine	Each	4.59 US
<input type="checkbox"/> Product	Qty: 1					

At the bottom of the page, there is a red footer bar with the text: 'Vanderbilt University eProcurement: [Return to Worklist](#)'.



Tip: You have the capability to sort by Description, Price, Unit, Supplier Part Number or Supplier Name. You also have the capability to hide any one of these columns from your results.



Tip: You also have the capability to filter on the Supplier Part Number or Supplier Name column to further limit your search results.



Tip: You may navigate through the list by using the **Next** and **Last Page** buttons located at the bottom of the page.

Selecting Items & Adding Them to Your Shopping Cart

Now, we'll provide some detail on how you can select items and add them to your shopping cart.

Before you start selecting items, you'll probably want to do some product research. To view detailed product information, click the **SKU** link for the product, as shown in the screen below:

Home Furniture Maintenance (MRO) Office / Forms Research Favorites External Help Search: Keyword GO Advanced

Back | Home | Search Results For : All Words ('broom') Cart | Checkout

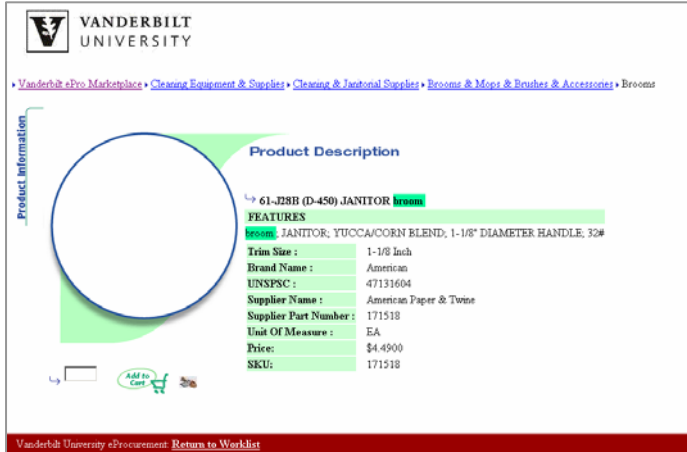
Browse Matching Categories
Refine Results By Category

With Selected: Displaying 1 - 7 of

	Actions	SKU	Product Description	Supplier Name	Unit	Cost
<input type="checkbox"/> Product Image	Qty: 1 	166702	31260 60" THRD HNDL-MTL TIP	American Paper & Twine	Each	1.72 US
<input type="checkbox"/> Product Image	Qty: 1 	171518	61-J288 (D-450) JANITOR BROOM	American Paper & Twine	Each	5.33 US
<input type="checkbox"/> Product Image	Qty: 1 	172205	61-H24 (D-101) HOUSEKEEP BROOM	American Paper & Twine	Each	4.59 US
<input type="checkbox"/> Product	Qty: 1	-----	-----	-----	-----	-----

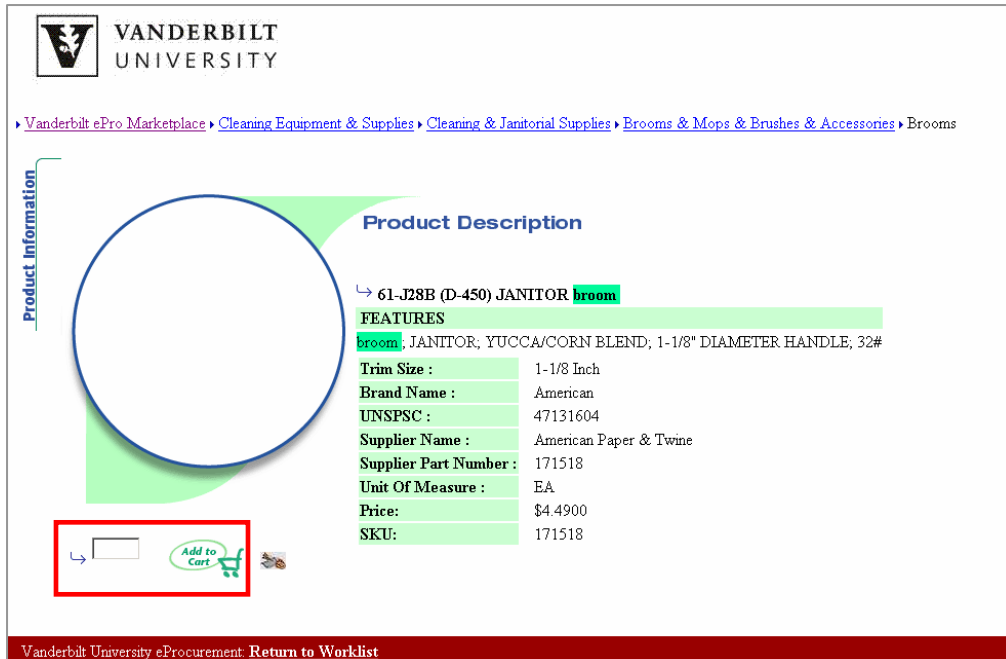
Vanderbilt University eProcurement: [Return to Worklist](#)

Upon doing so, you will see the following screen (the Product Description page), which displays a large picture of the product (when available), as well as the product description, contract information (when available), manufacturer or brand name, supplier name and part number, unit of measure, price, and SKU:

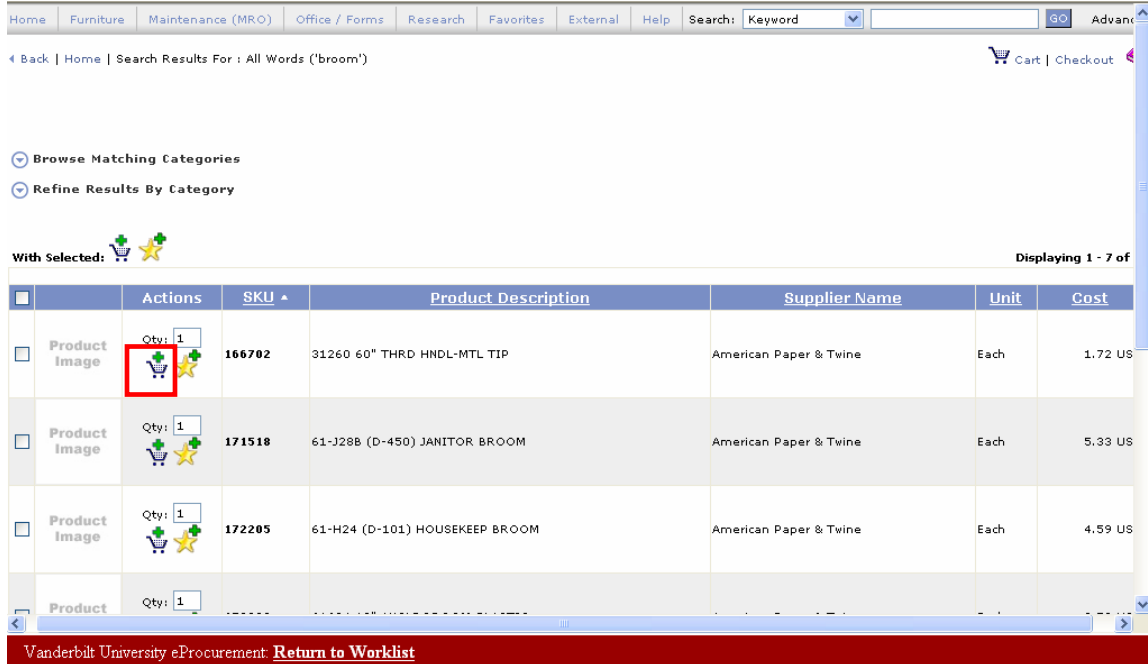


After identifying the item(s) you want to order, you'll need to specify a quantity for the item(s), then add the item(s) to your shopping cart. There are two ways you could do this:

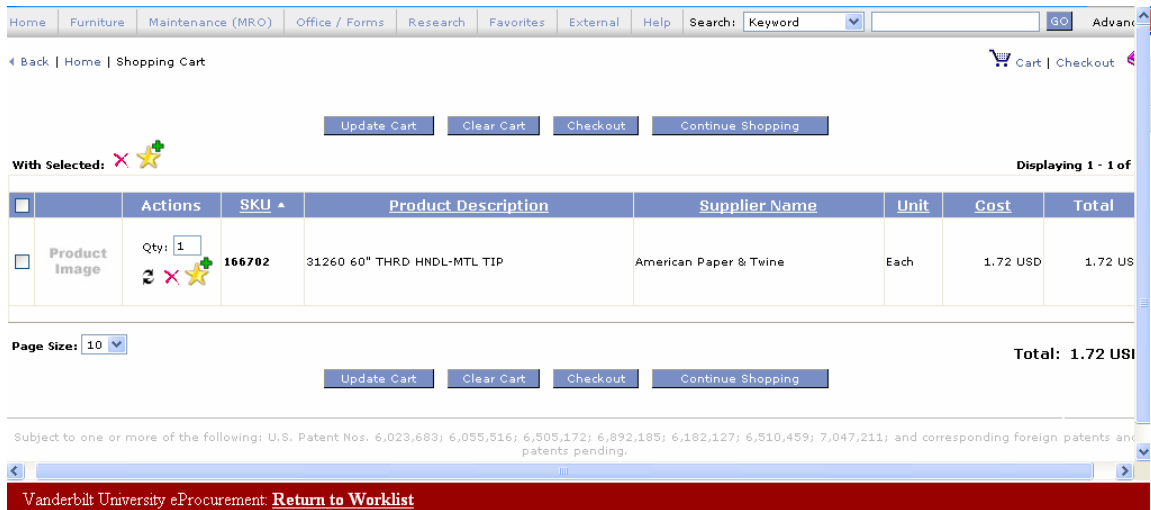
1. You can add a *single* item to your shopping cart from the Product Description page. To do so, enter the quantity in the space provided and click the **Add to Cart** button, as shown below:



- You can add *one or more* items to your shopping cart from the search results page. To do so, enter the quantity desired (if it's more than 1) and click the **Shopping Cart** button, as shown below:




- This brings you to the Shopping Cart page, where your selected items are displayed, as shown below:



Tip: To add more items to your shopping cart, click the **Continue Shopping** button.



Tip. To change the quantity of an item you have placed in your shopping cart, place your cursor in the quantity box associated with the item and delete the old quantity. Then, enter a new quantity and click **Update Cart**. If you wanted to remove the item from your shopping cart, either enter "0" in the quantity box and click **Update Cart**, or click the delete button

 next to the item you want to remove.

Adding Catalog Items to a Requisition

When you decide to bring catalog items back to eProcurement and have clicked the **Check out** button on the Shopping Cart page, you will see the following screen if you had accessed the eCatalog from the requisition tab:

worklist search requisition profile LOGOUT HELP

Return to Requisition ID: E000003916

Requisition Line Items

* Qty: 1 * UOM: EA * Item Number: 171518 * Unit Price: 4.49 * Ext Amount: 4.49 REMOVE

* Item Description: 61-J28B (D-450) JANITOR BROOM * Commodity: Brooms & mops & brushes an * Vendor: American Paper & Twine Co

Add to Favorites

* Qty: 3 * UOM: EA * Item Number: 172205 * Unit Price: 4.22 * Ext Amount: 12.66 REMOVE

* Item Description: 61-H24 (D-101) HOUSEKEEP BROOM * Commodity: Brooms & mops & brushes an * Vendor: American Paper & Twine Co

Add to Favorites

* Qty: 1 * UOM: EA * Item Number: 172629 * Unit Price: 3.20 * Ext Amount: 3.20 REMOVE ADD

* Item Description: 61604 12" ANGLE BROOM-PLASTIC * Commodity: Brooms & mops & brushes an * Vendor: American Paper & Twine Co

Add to Favorites

* Required field eCATalog SHOP FAVORITES SAVE CONTINUE

From here you can proceed with the creation of your requisition as explained in Lesson 3.

When you decide to bring catalog items back to eProcurement and have clicked the **Check out** button on the Shopping Cart page, you will see the following screen if you had accessed the eCatalog from the worklist tab:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 05/23/2005 01:07 PM

worklist search requisition profile LOGOUT HELP

Please Choose what you would like to do with these items in your cart.

New Requisition ADD TO REQUISITION DELETE

Select All	Item Number	Vendor	UOM	Qty	Commodity	Item Description	Price	Source
<input checked="" type="checkbox"/>	171518	0000043281	EA	1	47131600	61-J28B (D-450) JANITOR BROOM	\$4.49	ePlus
<input checked="" type="checkbox"/>	172205	0000043281	EA	3	47131600	61-H24 (D-101) HOUSEKEEP BROOM	\$4.22	ePlus
<input checked="" type="checkbox"/>	172629	0000043281	EA	1	47131600	61604 12" ANGLE BROOM-PLASTIC	\$3.2	ePlus

From here, you must choose what you would like to do with the items in your cart. You can do one of three things:

- **Delete one or more item(s)**
To do so, select the checkbox(es) associated with the item(s) you want to delete. Then click the red **Delete** button.
- **Add one or more item(s) to a new requisition**
To do so, select the checkbox(es) associated with the item(s) you want to add. Maintain the default selection, “New Requisition,” in the dropdown box. Then click the **Add to Requisition** button.
- **Add one or more items(s) to a saved requisition**
To do so, select the checkbox(es) associated with the item(s) you want to add. Select the appropriate requisition ID from the dropdown box. Then click the **Add to Requisition** button.

After clicking **Add to Requisition**, you will see the following screen, from where you can proceed with the creation of your requisition as outlined in Lesson 3:

The screenshot displays the 'Requisition Line Items' interface. At the top, there are navigation tabs: 'worklist', 'search', 'requisition', and 'profile'. A 'LOGOUT' button is in the top right. Below the tabs, a red link says 'Return to Requisition ID: E000003916'. The main area lists three items:

* Qty:	* UOM:	Item Number:	* Unit Price:	Ext Amount:	
1	EA	171518	4.49	4.49	REMOVE
* Item Description:		61-J28B (D-450) JANITOR BROOM		* Commodity: Brooms & mops & brushes an	
				* Vendor: American Paper & Twine Co	
<input type="checkbox"/> Add to Favorites					
3	EA	172205	4.22	12.66	REMOVE
* Item Description:		61-H24 (D-101) HOUSEKEEP BROOM		* Commodity: Brooms & mops & brushes an	
				* Vendor: American Paper & Twine Co	
<input type="checkbox"/> Add to Favorites					
1	EA	172629	3.20	3.20	REMOVE ADD
* Item Description:		61604 12" ANGLE BROOM-PLASTIC		* Commodity: Brooms & mops & brushes an	
				* Vendor: American Paper & Twine Co	
<input type="checkbox"/> Add to Favorites					

At the bottom, there is a '* Required field' label, an 'eCatalog' dropdown menu, and buttons for 'SHOP', 'FAVORITES', 'SAVE', and 'CONTINUE'.



Tip: Linked vendors and the eCatalog contain **timeouts** that release your shopping cart contents when that time has expired. When purchasing items from multiple vendors, add each item to a requisition in eProcurement before continuing to shop. This way, your contents will be saved.

LESSON 5: SHOPPING FROM A VENDOR-SPECIFIC CATALOG

In this section of the guide you will learn how to access a vendor-specific catalog from the eCatalog, shop for items, and bring the items back to the eProcurement system.

To illustrate the concept of shopping from a vendor-specific catalog and bringing items back to eProcurement, this guide will use the Guy Brown website as an example.

Accessing the Guy Brown Website

To access the Guy Brown website, go to the eCatalog main page. Click the **External** menu, choose **Catalogs**, and click **Guy Brown/Office Max**.



Searching the Guy Brown Website for Items

From the central Guy Brown page, you can locate items in the Guy Brown catalog using one of two possible methods:

The screenshot displays the Guy Brown website interface. At the top left, a 'Stopping Cart' shows 0 items and a subtotal of \$0.00. The 'guy-brown' logo is centered at the top. A 'Live Online Assistance' button is in the top right. Below the logo, there are links for 'Messages' and 'Refill Finder'. The main content area is divided into three sections: 'Search', 'Advanced Search', and 'Catalog'. 'Method #1' points to the 'Search' box, which includes a 'Keyword/Product #' field and a 'Go' button. 'Method #2' points to the 'Catalog' dropdown menu, which lists various product categories such as 'Basic Office Supplies', 'Binders & Filing', 'Calendars & Organizers', etc. The 'Advanced Search' form is highlighted with a red box and labeled 'Advanced Search Form'. It features a freeform search field, 'And/Or' dropdowns for 'Category' and 'Brand', and checkboxes for 'Contract Items' (with a 'G' icon), 'Diverse Supplier' (with a 'Diversity' icon), 'Small Business' (with an 'SB' icon), and 'Recycled Goods' (with a recycling icon). 'Clear' and 'Search' buttons are at the bottom of the form. A footer at the bottom of the page reads 'Vanderbilt University eProcurement: [Return to Worklist](#)'.

1. Search for a product by entering a keyword or product #. Enter your search criteria in the freeform field provided and click **Go**. To enter multiple search criteria, complete the Advanced Search form located in the center of the page.



Tip: To view only the items included in Vanderbilt’s pricing contract, use the “Contract Items” filter in the Advanced Search panel.

2. Search for a product by “drilling down” through catalog categories and subcategories.

Viewing Your Search Results

Depending upon how detailed your search criteria was, you may have to further refine your search to view product matches. The screen below displays the results of an advanced search on “black rollerball pens” with the “Contract items” filter applied:

The screenshot shows the Guy-Brown eProcurement interface. At the top left is a Shopping Cart summary with 0 items and a \$0.00 subtotal. The main search area displays 'Search Results' for the query 'black rollerball pens', showing 22 matches. A filter for 'Contract items' is active. A dropdown menu for 'Limit results to this brand:' is set to 'All', with a 'Refine Results' button next to it. Below this, two sub-categories are listed: 'Rollerball - Ink' (22 matches) and 'Rollerball - Gel' (12 matches). A catalog sidebar on the left lists various product categories like 'Basic Office Supplies', 'Binders & Filing', etc. The footer includes 'Vanderbilt University eProcurement: Return to Worklist'.

You can further limit results to a specific brand, by selecting a brand from the brand dropdown box and then clicking the **Refine Results** button. Alternatively, you can view product matches by drilling down into one of the product sub-categories listed, as shown below:

This screenshot shows the same search results page but with the 'Refine Results' button clicked. The 'Refine Results' section is expanded, showing a checked box for 'Show Only Contract Items' and a 'Refine Results' button. Below this, there are options to 'Hide Images' and 'Compare Items'. The main results area shows a list of items, sorted by 'Best Match'. Two items are visible:

Product Code	UOM	Delivery*	Your Price	Compare
N143110 Zebra Pen - J-Rollerball® - Translucent, Black, 0.7mm PEN,ROLLER,MED,7MM,BK SOS	EA	Next Day	\$0.46	<input type="checkbox"/>
N135200 Pilot - VBall Roller Ball Pens - Metallic Silver, Black, 0.5mm PEN,VBALL,LIQ,ROLLR,XF,BK	EA	Next Day	\$0.86	<input type="checkbox"/>

Each item includes a quantity field and an 'Add to Cart' button. The footer remains the same as the previous screenshot.

Selecting Items & Adding Them to Your Shopping Cart

To select an item, enter the quantity in the space provided and click the adjacent **Add to Cart** button, as shown below:

The screenshot shows the Guy-Brown eProcurement search results page. The search results are for "black rollerball pens" and returned 22 results. The page displays two items:

Product Code	UOM	Delivery*	Your Price	Compare
N143110	EA	Next Day	\$0.46	<input type="checkbox"/>
Zebra Pen - J-Rollerball® - Translucent, Black, 0.7mm PEN,ROLLER,MED,7MM,BK SOS				
QTY	10			Add to Cart
N135200	EA	Next Day	\$0.86	<input type="checkbox"/>
Pilot - VBall Roller Ball Pens - Metallic Silver, Black, 0.5mm PEN,VBALL LIQ,ROLLER,XF,BK				
QTY				Add to Cart

*Note: You can add multiple items to your cart by inputting a quantity for each item, then clicking one of the **Add to Cart** buttons on the page.*

This brings you to the Shopping Cart page, where your selected items are displayed, as shown below:

The screenshot shows the Guy-Brown eProcurement shopping cart page. The cart contains one item:

Qty	UOM	Product Code	Description	Delivery*	Your Price	Subtotal	Remove
10	EA	N143110	Zebra Pen - J-Rollerball® - Translucent, Black, 0.7mm PEN,ROLLER,MED,7MM,BK SOS	Next Day	\$0.46	\$4.60	<input type="checkbox"/>

Cart Subtotal: \$4.60

* Stock is not allocated until order is placed. Days indicated above are business days and may vary depending upon delivery location.



Tip: To add more items to your shopping cart, click the **Continue Shopping** button.



Tip. To change the quantity of an item you have placed in your shopping cart, place your cursor in the quantity box associated with the item and delete the old quantity. Then, enter a new quantity and click **Update Cart**. To remove the item from your shopping cart, click the Remove checkbox associated with the item and then click **Update Cart**.

Returning to the eProcurement System

Once you have finished working within the Guy Brown website, select one of the two ways you can return to the eProcurement system, which are as follows: (1) If you have decided to bring items back to eProcurement to add to a requisition or to your favorites list, click the **Check out** button on the Shopping Cart page; or (2) if you have decided not to bring items back to eProcurement, click the **Return to Worklist** link, as shown below:

The screenshot shows the Guy Brown website interface. At the top left, there is a 'Shopping Cart' summary with 'Number of Items: 0' and 'Subtotal: \$0.00'. Below this are 'View Cart' and 'Checkout' buttons. The main navigation bar includes 'Messages', 'Refill Finder', and 'Help'. A search bar is present with a 'Go' button. On the left, there is a 'Catalog' menu with various categories like 'Basic Office Supplies', 'Electronics', etc. The central area is titled 'Advanced Search' and contains several search filters: 'Enter Keyword or Product Code', 'Category', 'Brand', and checkboxes for 'Contract Items', 'Diverse Supplier', 'Small Business', and 'Recycled Goods'. At the bottom of the page, a red banner contains the text 'Vanderbilt University eProcurement' and a link 'Return to Worklist' which is highlighted with a red rectangular box.



Tip: Use the **Return to Worklist** link only when you intend to leave the Guy Brown website without items. If you have items in your shopping cart and click **Return to Worklist**, you will be returned to your worklist without the items in your shopping cart.

Adding Items to a Requisition

When you decide to bring catalog items back to eProcurement and have clicked the **Check out** button on the Shopping Cart page, you will see the following screen if you had accessed the vendor's website from the requisition tab:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 05/23/2005 03:04 PM

worklist search requisition profile LOGOUT HELP

Requisition Line Items [Return to Requisition ID: E000003926](#)

* Qty:	* UOM:	Item Number:	* Unit Price:	Ext Amount:	REMOVE	ADD
10	EA	N143110	0.46	4.60		

* Item Description: PEN,ROLLER,MED,,7MM,BK

* Commodity: Rollerball pens

* Vendor: Guy Brown Products

Add to Favorites

* Required field eCATalog SHOP FAVORITES SAVE CONTINUE

STAR | NARRATIVE CHART OF ACCOUNTS |

From here you can proceed with the creation of your requisition as outlined in Lesson 3.

When you decide to bring catalog items back to eProcurement and have clicked the **Check out** button on the Shopping Cart page, you will see the following screen if you had accessed the vendor's website from the worklist tab:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 05/23/2005 03:04 PM

worklist search requisition profile LOGOUT HELP

Please Choose what you would like to do with these items in your cart.

New Requisition ADD TO REQUISITION DELETE

select All	Item Number	Vendor	UOM	Qty	Commodity	Item Description	Price	Source
<input checked="" type="checkbox"/>	N143110	0000053231	EA	10	44121701	PEN,ROLLER,MED,,7MM,BK	\$0.46	Guy Brown

STAR | NARRATIVE CHART OF ACCOUNTS |

From here, you must choose what you would like to do with the items in your cart. You can do one of three things:

- **Delete one or more item(s)**
To do so, select the checkbox(es) associated with the item(s) you want to delete. Then click the red **Delete** button.
- **Add one or more item(s) to a new requisition**
To do so, select the checkbox(es) associated with the item(s) you want to add. Maintain the default selection, “New Requisition,” in the dropdown box. Then click the **Add to Requisition** button.
- **Add one or more items(s) to a saved requisition**
To do so, select the checkbox(es) associated with the item(s) you want to add. Select the requisition ID from the dropdown box. Then click the **Add to Requisition** button.

After clicking **Add to Requisition**, you will see the following screen from where you can proceed with the creation of your requisition as explained in Lesson 3:

The screenshot displays the 'VANDERBILT UNIVERSITY eProcurement' interface. At the top, there is a navigation bar with tabs for 'worklist', 'search', 'requisition', and 'profile', along with 'LOGOUT' and 'HELP' buttons. The 'requisition' tab is active. Below the navigation bar, the page title is 'Requisition Line Items' and a link to 'Return to Requisition ID: E000003926' is visible. The main content area shows a table with one item:

* Qty:	* UOM:	Item Number:	* Unit Price:	Ext Amount:	
10	EA	N143110	0.46	4.60	<input type="checkbox"/> REMOVE <input type="checkbox"/> ADD

Below the table, there are two columns of details:

- * Item Description: PEN,ROLLER,MED.,7MM,BK
- * Commodity: Rollerball pens
- * Vendor: Guy Brown Products

There is an 'Add to Favorites' checkbox. At the bottom, there is a dropdown menu for 'eCATalog' and buttons for 'SHOP', 'FAVORITES', 'SAVE', and 'CONTINUE'. A footer bar contains the text 'STAR | NARRATIVE CHART OF ACCOUNTS |'.

LESSON 6: WORKLIST

Review: What is the Worklist?

Your worklist is essentially your eProcurement to-do list. The worklist contains items that (1) are pertinent to your role(s) in eProcurement and (2) can have action taken on them by the Creator, Reviewer, or Executor.

The requisitions in your worklist are organized by role. If you have one or more of the previously mentioned roles, such as Creator and Reviewer, for example, you will see all requisitions on which you are a Creator grouped together and all requisitions on which you are a Reviewer grouped together.

The sample worklist is displayed below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 05/23/2005 01:07 PM

worklist search requisition profile LOGOUT HELP

Quick Search: Req Id Begins With [] Submit

eCATalog SHOP

Creator

2 items found, displaying all items.

Req Id	Submit Date	Status	Vendor Name	Account	Center	Total Amount	Reviewed By	Executed By	Commodity
E000003902		Saved	U S A Scientific Plastics Inc	61440	1551100000	\$113.97			41120000
E000003916		Saved	American Paper & Twine Co			\$20.35			47131600

| STAR | NARRATIVE CHART OF ACCOUNTS |

Note: In this particular example, the individual is a Creator only. So, she only has a Creator worklist.

Also Note: If you do not have a Creator, Reviewer, or Executor or Buyer role in the eProcurement system, you will not have a worklist or even see the Worklist tab when you login.

Requisition Status

The worklist enables you to track the status of a requisition as long as your name is attached to that requisition. The various statuses you may see on your eProcurement worklist are defined below:

Status	What does this mean?	Who will see it?
Saved	Refers to requisitions that the Creator has started and saved in eProcurement, but not submitted for approval.	Creator only
Submitted	Refers to requisitions awaiting approval.	Creator, Reviewer, & Executor
Re-submitted	Refers to requisitions which have been re-submitted after having been recalled or rejected	Creator, Reviewer, & Executor
Recalled	Refers to requisitions which have been retracted by the Creator	Creator only
Buyer Review	Refers to requisitions that have been approved by an Executor that need the secondary approval of a Buyer in Procurement Services (i.e. those requisitions with <i>non-catalog</i> items totaling greater than \$1,000.00)	Creator & Buyer
Rejected	Refers to requisitions that the Executor or Buyer has rejected back to the Creator.	Creator only
Modified	Refers to a requisition on which a Buyer has made changes in eProcurement that require Creator action. Changes that cause the requisition to be routed back to the Creator include changing the vendor, item number, or increasing the extended line amount by more than 1%.	Creator only
Approved	Buyer has approved the requisition or the Executor has approved the requisition when no Buyer approval was needed	Creator
Loading PO	PO has been sent to the purchasing system and is being processed	Creator*
PO Loaded	The purchasing system has loaded the PO but has not created file to be dispatched to vendor	Creator*
PO Pending Dispatch	The PO document has been created to transmit to the third party faxing service, but not yet sent	Creator*
Transmitted	The PO document has been transmitted to the third party faxing service, who will in turn fax to the vendor	Creator*

Dispatch Failed	Fax attempts failed and PO has been routed to a Buyer in Procurement Services to manually fax to the vendor	Creator & Buyer
-----------------	---	-----------------

* The Creator will rarely see these statuses due to the speed with which the requisition moves through these steps.



Tip: Once the purchase order is successfully received by the vendor, the eProcurement system assigns it a status of “Completed.” Once completed, the requisition no longer appears in the worklist, but can be viewed from the Search tab.

Creator’s Worklist

The fields included in the Creator’s worklist are: Requisition ID, Submit Date, Status, Vendor Name, Account Number, Center Number, Total Amount, Reviewed By, Executed By, and Commodity Code.

Reviewer’s Worklist

The fields included in the Reviewer’s worklist are: Requisition ID, Creator Name, Reviewed By, Vendor Name, Account Number, Center Number, Total Amount, Submit Date, Status, and Commodity Code.

Executor’s Worklist

The fields included in the Executor’s worklist are: Requisition ID, Creator Name, Reviewed By, Executed By, Vendor Name, Account Number, Center Number, Total Amount, Submit Date, Status, and Commodity Code.



Tip: The Requisition ID is a hyperlink. Clicking on it will enable you to view the requisition and, depending upon your role and what status the requisition is in, perform an action on it.



Tip: Once the requisition has been submitted, the Reviewed By and Executed By fields appear as dropdown boxes. Clicking on the box’s down arrow will expand it, allowing you to view the names of the approvers assigned to the requisition, as well as whether or not they have acted upon it. This is for viewing purposes only. To actually Review or Execute a requisition, you must open the requisition and use the **Agree/Disagree** buttons (for reviewing) or the **Approve/Reject** buttons (for executing). Reviewing and Executing Requisitions is covered in Lesson 7 of this guide.

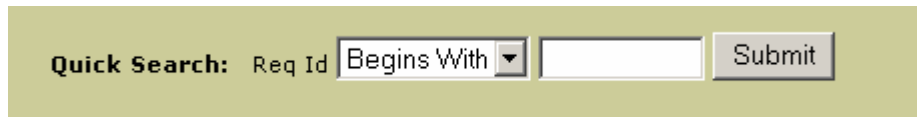
Navigating Through Your Worklist

Next/Previous Buttons

When you have more than 25 items in your worklist, a new page will be generated and you will have to scroll to that next page to see the remainder of your items. When this occurs, you will see **Next/Previous** buttons displayed on the top-left of your worklist. Click on those buttons to navigate from one page to another.

Quick Search

If you have multiple requisitions in your worklist, you can use the Quick Search tool that is displayed at the top of your worklist. This is what the Quick Search tool looks like:

The image shows a search interface on a light green background. It starts with the text "Quick Search:" followed by "Req Id". To the right of "Req Id" is a dropdown menu currently set to "Begins With". Next to the dropdown is an empty text input field. To the right of the input field is a grey button with the word "Submit" written on it.

It enables you to search by Req ID using the qualifiers Begins With, Equals or Contains. You would then input your search criteria into the adjacent field, and click the **Submit** button.

Sort Capabilities

By default, the worklist is sorted by submit date (oldest), status (alphabetical), and requisition number (numerical).

You can re-sort your worklist by Requisition ID, Submit Date, Status, Vendor Name, Creator Name, Account Number, Center Number, Total Amount, or Commodity Code. To perform the sort, simply click on the column header.

LESSON 7: REVIEWING & EXECUTING A REQUISITION

Reviewer Role

As a Reviewer, when you view a requisition from your worklist by clicking the Req ID you will see a screen that looks very similar to the following:

Requisition

Req Id: E000002160 Req Date: Dec 16, 2004 Status: Submitted Dec 16, 2004 2:22 PM
 Creator: Grayson,Anthony M Buyer: Kaufman,Jane Req Type:
 Due Date: Dec 23, 2004 Total Amount: \$463.47
 Ship To: Vanderbilt University
 cora mis
 1104 Baker Building
 110 21st Avenue South
 Nashville, TN 37203

Status:
 Purchase Order #: PO Date: Vendor: Nashville Office Interiors
 Contact: Contact Phone: Contact Date:

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UOM	Price	Ext Amount
1	Nashville Office Interiors	14359393	Chairs, Supplier Name: Nashville Office Interiors (NOI), Supplier Part Number: 14359393, Unit Of Measure: EA, Cost: 463.4700	ePlus	56101504	1	EA	\$463.47	\$463.47
Account		Center	SLID	SLAC	Amount				
60000					\$463.47				

Approvers

Role	Center	Name	Date	Approval
REVIEWER		Getsay,Jennifer K	Mar 3, 2005 5:17 PM	Y
REVIEWER		Price,Betty L		
REVIEWER		Smith,Kimberley K		
EXECUTOR		Deal,Tonjia L		
EXECUTOR		Grayson,Anthony M		
EXECUTOR		Price,Betty L		
EXECUTOR		Smith,Kimberley K		

Notes: **Enter comments here.**

Reviewer: **AGREE** **DISAGREE**

Within the Approvers section of the screen, you can see the names of the other approvers (i.e. – Reviewers and Executors), as well as whether or not another Reviewer has already reviewed the requisition and, if so, on what date. Also within this section, you have the capability to enter comments, agree with the requisition by clicking the **Agree** button, or disagree with the requisition by clicking the **Disagree** button. Though not pictured above, there is also a Current Notes section of the screen, where you can see the comments that any other Reviewers may have made about the requisition.

Once you agree or disagree with a requisition, it will disappear from your worklist. If you need to access it again, you can do so from the Search tab.

Note: The requisition will disappear from your worklist as soon as the Executor takes action on it, regardless of whether or not you have had the opportunity to agree or disagree with the requisition.

Executor Role

As an Executor, when you view a requisition from your worklist you will see the following screen:

The screenshot displays the 'Requisition' screen with the following details:

- Req Id: E00002233, Req Date: Jan 21, 2005, Status: Submitted Jan 21, 2005 10:40 AM
- Creator: Huffman, Lana L, Buyer: Hildebrand, Brenna, Reg Type:
- Due Date: Jan 28, 2005, Total Amount: \$111.62
- Ship To: Vanderbilt University, LARAE MIS, 204 Maintenance Building, Appleton Drive, Nashville, TN 37203
- Vendor: American Paper & Twine Co

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UOM	Price	Ext Amount
1	American Paper & Twine Co	37063	21X15X48 HYY CLR POLY LINER	ePlus	47121700	3	CA	\$23.58	\$70.74
		Account	Center	SLID	SLAC	Amount			
		70010				\$70.74			
2	American Paper & Twine Co	458059	23304 ACCLAIM TOWELS	ePlus	14111700	4	CA	\$10.22	\$40.88
		Account	Center	SLID	SLAC	Amount			
		70010				\$40.88			

Approvers

Role	Center	Name	Date	Approval
EXECUTOR		Getsay, Jennifer K		
EXECUTOR		Huffman, Lana L		
EXECUTOR		Ritz, Raymond N		

Notes:
Enter comments here.

Executor: APPROVE REJECT

Within the Approvers section of the screen, you can see the names of the other approvers (i.e. – Reviewers and Executors), as well as whether or not another approver has already acted upon the requisition and, if so, on what date. Also within this section, you have the capability to enter comments, approve the requisition by clicking the **Approve** button, or reject the requisition by clicking the **Reject** button. If you reject a requisition back to the Creator, it is recommended that you provide a note as to why in the comments field. Within the Current Notes section of the screen (not pictured here), you can see the comments that any other approvers may have made about the requisition.

Once you approve or reject a requisition, it will disappear from your worklist. If you need to access it again, you can do so from the Search tab.

If you approved a requisition that included noncatalog items totaling greater than \$1,000.00, it is routed to a Buyer in Procurement Services for his/her review. Otherwise, as soon as you approve a requisition, a purchase order will be generated and faxed to the vendor. If you rejected a requisition, it is returned to the Creator's worklist from where he can edit and resubmit it or delete it – based on the feedback you provided in the comments field.

LESSON 8: RECALLING A SUBMITTED REQUISITION

Recalling a Requisition - Creator Only

A Creator may recall a requisition that is in Submitted or Re-submitted status if the Executor has not yet acted upon it (by approving or rejecting it). As a Creator, when you view a Submitted or Re-submitted requisition from your worklist you will see the following screen:

The screenshot displays the 'Requisition' screen with the following details:

- Req Id: E000002124
- Req Date: Dec 16, 2004
- Status: Submitted Dec 16, 2004 11:34 AM
- Creator: Getsay, Jennifer K
- Buyer: Hildebrand, Brenna
- Req Type:
- Due Date: Dec 23, 2004
- Total Amount: \$335.43
- Ship To: Vanderbilt University, Getsay, Jennifer K FIS, 1104 Baker Building, 110 21st Avenue South, Nashville, TN 37203
- Vendor: Nashville Office Interiors

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UDM	Price	Ext Amount
1	Nashville Office Interiors	9313131	Printer & Copier Papers, Supplier Name: Nashville Office Interiors (NOI), Supplier Part Number: 9313131, Unit Of Measure: EA, Cost: 111.8100	ePlus	14111500	3	EA	\$111.81	\$335.43
Account		Center	SLID	SLAC	Amount				
60010					\$335.43				

Approvers

Role	Center	Name	Date	Approval
REVIEWER		Getsay, Jennifer K		
REVIEWER		Zerbst, David J		
EXECUTOR		Getsay, Jennifer K		
EXECUTOR		Zerbst, David J		

Notes:

Creator: **RECALL** Recall Button

Notice the presence of the yellow **Recall** button at the bottom of the page. If you want to make edits to a requisition or delete it altogether, you can use the **Recall** button to return the requisition to your worklist.

Note: If a requisition has been recalled by a Creator or rejected by an Executor, any notes displayed in the Current Notes section of the screen will become Historical Notes and will be displayed as such if/when the requisition is re-submitted.

LESSON 9: SEARCHING FOR REQUISITIONS

Review: What is the Search Tab?

Within the Search Tab, the eProcurement system provides search capabilities to allow Creators, Executors, Reviewers, eProcurement Viewers and eDog Viewers to locate a requisition based on any combination of the following fields: person, role, center, vendor, commodity, requisition ID, account, amount, status and submit date. Also, within the Search Tab, the eProcurement system provides purchase order and departmental invoice report copies for requisitions in “Completed” status.

My Reqs vs. My Centers

When you click the Search tab, you will see the following screen:

As you can see, you are presented with the option to search by My Reqs or My Centers. The **My Reqs** option was designed for those of you whose eProcurement role is not tied to a specific cost center. This includes those individuals with only the Creator role. The **My Centers** option was designed for those of you whose role is not tied to a specific requisition. This includes eProcurement Viewers and eDog Viewers. Because Executors and Reviewers are tied to both requisitions and centers, they can use either search option!



Tip: The Search tab will be of particular use to a “high-level” Executor who needs to be able to find and execute requisitions that he is authorized to execute, but for which he is not one of the original, primary Executors. The same holds true for “high-level” Reviewers.

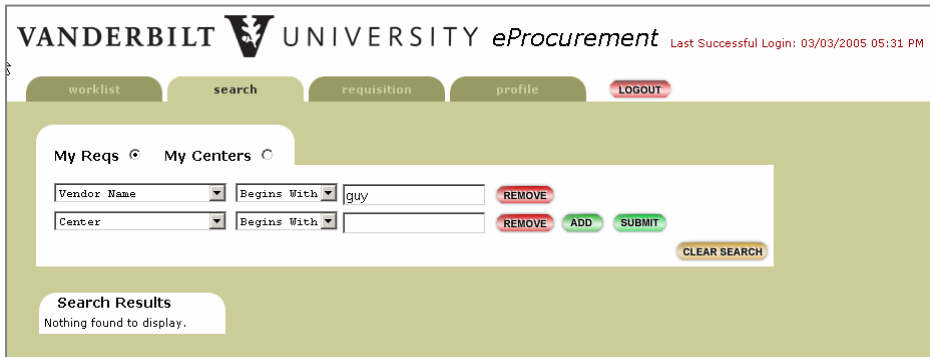
Besides intended audience, what is the difference between the two? The **My Centers** option offers three search fields in addition to the 13 search fields the **My Reqs** option offers: center name, sumto, and sumto name. Also, the My Centers option can display a list of centers or sumtos on which you have access (by virtue of an eProcurement Viewer, eDog, Viewer Executor, and/or Reviewer role) and from which you can choose.

Now, we’ll provide a couple of examples to illustrate different searches you can perform from the Search tab.

Exercise 1: Specifying Multiple Search Criteria

This exercise illustrates how you can search for requisitions by entering multiple search criteria.

1. Click the Search tab.
2. From the first dropdown box select Vendor Name. The options available in the second dropdown box are Begins With, Equals and Contains. Maintain the default selection of Begins With and input the word “guy” into the adjacent box. Then, click the **Add** button. Upon doing so, you will see the following screen:



VANDERBILT UNIVERSITY eProcurement Last Successful Login: 03/03/2005 05:31 PM

worklist search requisition profile LOGOUT

My Reqs My Centers

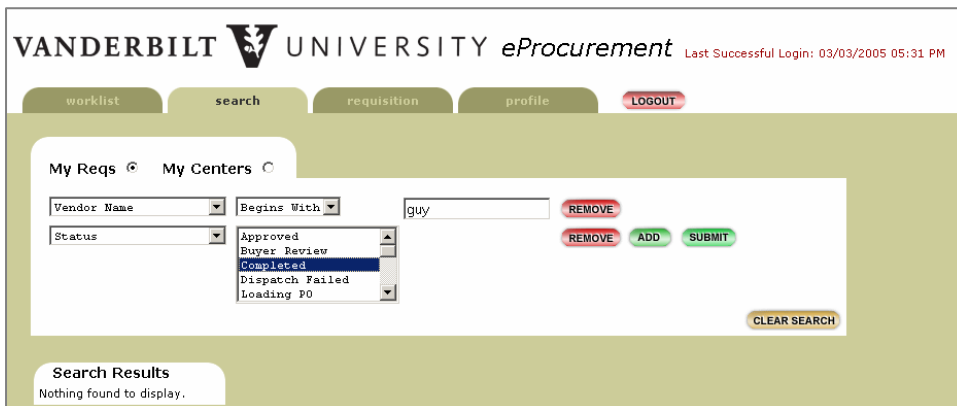
Vendor Name Begins With guy REMOVE

Center Begins With REMOVE ADD SUBMIT

CLEAR SEARCH

Search Results
Nothing found to display.

3. Clicking the **Add** button provided another search line with which you can further limit your results. From the first dropdown box, select Status. Doing so will generate a box that lists all eProcurement statuses. Select “Completed.”



VANDERBILT UNIVERSITY eProcurement Last Successful Login: 03/03/2005 05:31 PM

worklist search requisition profile LOGOUT

My Reqs My Centers

Vendor Name Begins With guy REMOVE

Status Approved Buyer Review Completed Dispatch Failed Loading PO REMOVE ADD SUBMIT

CLEAR SEARCH

Search Results
Nothing found to display.



Tip: You can remove a search line by clicking the red **Remove** button associated with that search line.

4. Next, click the green **Submit** button located on the right side of the search box.
5. Your search will return all requisitions to which you are tied and that have a Vendor Name that begins with “guy” (i.e. – Guy Brown) and a status of “Completed.”

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 03/03/2005 05:31 PM

worklist search requisition profile LOGOUT

My Reqs My Centers

Vendor Name Begins With REMOVE REMOVE ADD SUBMIT

Status Approved Buyer Review Completed Dispatch Failed Loading PO CLEAR SEARCH

Search Results
3 items found, displaying all items.

Req Id	Submit Date	Status	Vendor Name	Account	Center	Total Amount	Creator Name
E000002052	12/03/2004	Completed	Guy Brown Products	60040		\$400.00	Zerbst,David J
E000002063	12/09/2004	Completed	SPLIT	60040		\$36.00	Zerbst,David J
E000001393	09/29/2004	Completed	SPLIT	SPLIT	1001100000	\$42.50	Getsay,Jennifer K

Exercise 2: Searching From My Center List

The next exercise is specific to the My Centers option and illustrates how to generate a list from which you can select one or multiple centers and view the requisitions associated with them. This would be particularly useful to someone with the eProcurement Viewer and/or eDog Viewer roles.

1. Click the Search tab, then select the My Centers radio button.
2. From the first dropdown box select Center. The options available in the second dropdown box are Begins With, Equals, Contains, and In List. Select In List and click the hyperlink **Center Search**.

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 03/03/2005 05:31 PM

worklist search requisition profile LOGOUT

My Reqs My Centers

Center In List Center Search ADD SUBMIT

CLEAR SEARCH

Search Results
Nothing found to display.

- You will see the following screen:

worklist search requisition profile LOGOUT

Optional: Search by center:
 Center [v] Begins With [v] SEARCH

Select All

Low-Level Center (Number / Name / Ctr Resp Person / Status)

1-55	PRICE B	OPEN
1-55	PRICE B	OPEN
1-55	BRISKY L	OPEN
1-55	FUQUA P	OPEN
1-55	FIFE J	OPEN
1-55	PRICE B	OPEN
1-55	HOFFMAN S	OPEN
1-55	GETSAY T	OPEN
1-55	GETSAY T	OPEN
1-55	GETSAY T	OPEN
1-55	**CLOSED**	CLOSED
1-55	GETSAY T	OPEN
1-55	**CLOSED**	CLOSED
1-55	FIFE J	OPEN
1-55	**CLOSED**	CLOSED

SubMIT

Note: All of the center numbers to which you are tied via an eProcurement Viewer, eDog Viewer, Executor and/or Reviewer role are displayed, along with the center name, center responsible person, and center status. If your list is long, the optional search tool displayed at the top of your list enables you to search your list by Center or Center Name using the qualifiers Begins With, Equals, or Contains.

- Click the **Select All** button to highlight all of the centers in the list box. Then, click the **Submit** button.



Tip: Instead of using the **Select All** button, you could have selected a single center by simply clicking on it within the box. Alternatively, you could have selected multiple consecutive centers using the SHIFT key + click or multiple nonconsecutive centers using the CTRL key + click.

- The search will return all requisitions pertinent to the centers you selected.

LESSON 10: VIEWING PURCHASE ORDERS & INVOICES

Once the requisition has a status of “Completed,” meaning that the purchase order was received by the vendor, the purchase order will be available for viewing and printing from the Search tab in the eProcurement system. And, once the invoice is received by Disbursement Services, the departmental invoice report (DIR) will be available for viewing and printing. *Note: You can only view one purchase order or Departmental Invoice Report at a time.*

Within the Search tab, once you find the requisition for which you want to view and/or print the purchase order and/or departmental invoice report, click on the Requisition ID hyperlink, as shown in the following screen:

When you open the requisition, you will see information displayed about the purchase order (including the purchase order number and purchase order date). You will also see information displayed about the invoice (including the invoice ID, invoice date, and voucher ID). Note that the purchase order number and the voucher ID are displayed as hyperlinks, as shown below:

The screenshot displays the 'Requisition' page in the Vanderbilt University eProcurement system. The page header includes the university logo and 'eProcurement' text, along with a 'Last Successful Login' timestamp. Navigation tabs for 'worklist', 'search', 'requisition', and 'profile' are visible, along with 'LOGOUT' and 'HELP' buttons. The requisition details include: Requisition ID: E00001680, Requisition Date: Jan 17, 2005, Status: Completed, Creator: Smith, Brenda C, Buyer: Hildebrand, Brenna, Due Date: Jan 24, 2005, and Total Amount: \$110.17. The ship-to address is Vanderbilt University, Smith, Brenda C Management Information Systems, 218 Home E Home Economics Building, 134 Magnolia Circle, Nashville, TN 37203. Below this, the purchase order and invoice information is shown: Purchase Order #: 5005161152 (highlighted), PO Date: Jan 18, 2005, Vendor: Guy Brown Products, Contact: Brenda Smith, Contact Phone: 615-322-0571, Contact Date: Jan 17, 0005, Invoice ID: 748112, Invoice Date: Jan 19, 2005, and Voucher ID: 03119468 (highlighted). A table at the bottom lists two line items: Line 1 for Lunch napkins and Line 2 for Plain White Envelopes, both from Guy Brown Products.

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UOM	Price	Ext Amount
1	Guy Brown Products	A737707	Lunch napkins		44120000	6	PK	\$7.18	\$43.08
	Account	Center	SLID	SLAC	Amount				
	60040	1551200000			\$43.08				
2	Guy Brown Products	P211130	Plain White Envelopes		44120000	2	BX	\$23.75	\$47.50
	Account	Center	SLID	SLAC	Amount				
	60040	1551200000			\$47.50				

To view a purchase order or departmental invoice report, click on the respective hyperlink.

Note: The purchase order and departmental invoice report are displayed as .PDF files. You will need Adobe Acrobat installed on your computer to view the file.

LESSON 11: USER PROFILE

To complete your user profile, click the tab labeled Profile, complete any or all of the fields provided, then click **Save**, as shown below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login:
08/23/2005 02:35 PM

worklist search requisition **profile** LOGOUT HELP

User Profile

VU Contact Name:

VU Contact Phone:

VU Contact Email:

Ship To Id:

Attn:

Ship To Dept:

Ship To Room:

Tip: When entering a phone number, remember to include the area code!

Each time you create a new requisition, the information entered into the profile will automatically default into the Requisition Header. If you have completed all of the fields in your User Profile, you no longer have to complete the Requisition Header page (because the system will do it for you). If you have completed some, but not all, of the fields in your User Profile, you will be taken to Requisition Header page where you will be prompted to supply this information on a requisition-by-requisition basis.



Tip: All defaults specified in your user profile can be overridden on the requisition. To do so, click the **Edit Header** button at the top of the page, as shown below:

worklist search requisition **profile** LOGOUT HELP

Requisition

Req Id: E00003902 Req Date: May 22, 2005 Status: Saved
 Creator: Getsay, Jennifer K Buyer: Jenkins, Tamena Req Type: GEN
 Due Date: May 29, 2005 Total Amount: \$113.97

Ship To: Vanderbilt University
 Jennifer Getsay Accounting Office
 1104 Baker Building
 110 21st Avenue South
 Nashville, TN 37203

Status: PO Date: Vendor: U S A Scientific Plastics Inc
 Purchase Order #: Contact Phone: Contact Date:

Line #	Vendor	Item Number	Item Description	Catalog Id	Commodity	Qty	UOM	Price	Ext Amount
1	U S A Scientific Plastics Inc	1450-0810	5 ml Tubes, 500 per unit		41120000	1	EA	\$61.77	\$61.77
	Account	Center	SLID	SLAC	Amount				
	61440	1551100000			\$61.77				
2	U S A Scientific Plastics Inc	R05258	MSE I Restriction Enzyme, 500Units		41120000	1	EA	\$52.20	\$52.20
	Account	Center	SLID	SLAC	Amount				
	61440	1551100000			\$52.20				

Approvers

Role	Center	Name	Date	Approval
REVIEWER	1551100000	Parish, Anna L		
EXECUTOR	1551100000	Price, Betty L		

Creator:

LESSON 12: ePROCUREMENT ITEM FAVORITES

You have the capability to create and maintain a list of frequently purchased noncatalog and catalog items.

Adding an Item to Your Favorites List

You add items to your Favorites List from the Requisition Line Items page. To add an item to your favorites list, select the **Add to Favorites** checkbox associated with the item, then click the **Save** or **Continue** button as shown below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 01/09/2005 04:26 PM

worklist search requisition profile LOGOUT

Requisition Line Items Return to Requisition ID: E000002152

* Qty:	* UOM:	Item Number:	* Unit Price:	Ext Amount:	REMOVE	ADD
5	EA - Each	98765	20.00	100.00		

* Item Description: Toner

* Commodity: Office Supplies (Paper, Toner)

* Vendor: American Paper & Twine Co
vendor lookup

Add to Favorites

* Required field

SHOP FAVORITES SAVE CONTINUE

Click [here](#) to log in to STAR.

Upon doing so, the item will be added to your favorites list, which is stored in the Profile tab:

The screenshot shows the 'User Profile' section with the following details:

- VU Contact Name: Getsay, Jennifer E
- VU Contact Phone: 322-5555
- VU Contact Email: Jennifer.Getsay@vanderbilt.edu
- Ship To Id: BAK
- Attn: Jennifer Getsay
- Ship To Dept: Office of Accounting
- Ship To Room: 1104

Below the profile is the 'Item Favorites' section, which is highlighted with a red box. It displays a table of favorite items:

Item Number	Vendor	UOM	Commodity	Item Description	Price	Source	Last Invoice Price	Last Invoice Date	
37457	American Paper & Twine Co	CA	Cleaning Services, Janitorial	04460 SOFT BLEND TOILET TISSUE	\$28.63				EDIT DELETE
476945	American Paper & Twine Co	CA	Cleaning Services, Janitorial	05800 SCOTT ECONOMIZER WIPER	\$20.44				EDIT DELETE

Adding a Favorite Item to a Requisition

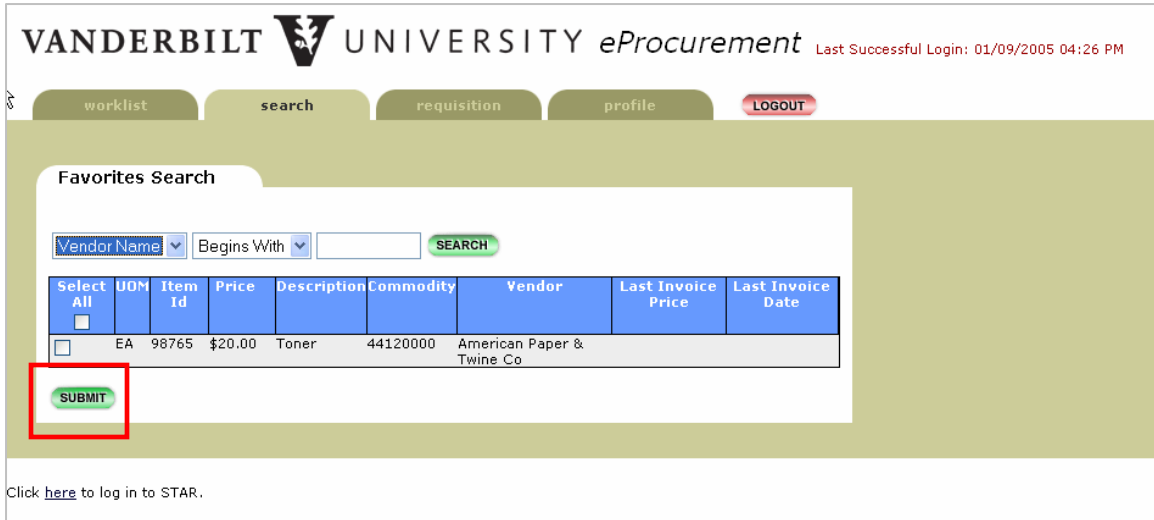
To add a favorite item to a requisition, first click the Requisition tab. Next, click the **Favorites** button on the Requisition Line Items page.

The location of this button is illustrated below:

The screenshot shows the 'Requisition Line Items' page. At the bottom of the form, there are several buttons: SHOP, FAVORITES, SAVE, and CONTINUE. The 'FAVORITES' button is highlighted with a red box.

Below the screenshot, there is a link: Click [here](#) to log in to STAR.

Upon clicking the **Favorites** button, you will see the following screen:



VANDERBILT UNIVERSITY eProcurement Last Successful Login: 01/09/2005 04:26 PM

worklist search requisition profile LOGOUT

Favorites Search

Vendor Name Begins With SEARCH

Select All	UOM	Item Id	Price	Description	Commodity	Vendor	Last Invoice Price	Last Invoice Date
<input type="checkbox"/>	EA	98765	\$20.00	Toner	44120000	American Paper & Twine Co		

SUBMIT

Click [here](#) to log in to STAR.

To add an item to your requisition, click the checkbox associated with the item(s) you want to purchase and click **Submit**.



Tip: You may have an unlimited number of items in your Favorites, and you may add multiple favorite items to a requisition at once.



Tip: Using the search tool displayed above your favorites list, you can search your favorites list by “Vendor Name.”

After you click **Submit**, you will be returned to the Requisition Line Items page, where you will be required to input a quantity for each favorite item(s) you selected:

Upon inputting a quantity, proceed as you normally would with the creation of your requisition.

Maintaining Favorites Items

From the Profile tab, you can delete and, in some cases, edit items on your list of favorites.

Click the Item Favorites Tab. As shown below, there is an **Edit** button and a **Delete** button associated with the item if it’s a noncatalog item or if it’s an item from the website of a vendor accessible from eProcurement (such as Guy Brown). There is only a **Delete** button associated with the item if it’s an item from the eCatalog because updates to items from the eCatalog occur automatically.

worklist search requisition **profile** LOGOUT HELP

User Profile

VU Contact Name:

VU Contact Phone:

VU Contact Email:

Ship To Id:

Attn:

Ship To Dept:

Ship To Room:

Item Favorites Center Favorites Account Favorites

5 items found, displaying all items.

Item Number	Vendor	UOM	Commodity	Item Description	Price	Source	Last Invoice Price	Last Invoice Date	
6587446698	American Paper & Twine Co	EA	Office Equipment & Accessories	Dry Erase Board	\$20.04				<input type="button" value="EDIT"/> <input type="button" value="DELETE"/> <input type="button" value="DELETE"/>
672033	American Paper & Twine Co	EA	Ink cartridges	HEW C6657AN #57 COLOR IJ CART	\$37.61	ePlus			<input type="button" value="DELETE"/>

Note: Though you are able to edit items added to your Favorites list from a vendor's website, it is recommended that you only edit the price.

If you click the Edit button associated with an item, you will be brought the following screen, where you can change any previously entered information about the item:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 08/15/2005 10:47 AM

worklist search requisition **profile** LOGOUT HELP

Item Favorite

UOM:

Item Number:

Item Description:

Commodity:

Vendor:

Unit Price:

Last Invoice Price and Date:

Comments:

[STAR](#) ■ [Narrative Chart of Accounts](#) ■ [FAQs](#) ■ [Online Training](#) ■ [FIS](#) ■ [Procurement](#)

The eProcurement system has a mechanism in place for capturing price changes for favorite items that are non-catalog or from a vendor-specific catalog that's accessible from eProcurement. When the system detects one of your invoices on which the favorite item appears, the system will record the item price in the Last Invoice Price column and the date of the invoice in the Last Invoice Date column, as shown below:

Item Favorites			Center Favorites			Account Favorites		
5 items found, displaying all items.								
Item Number	Vendor	UOM	Commodity	Item Description	Price	Source	Last Invoice Price	Last Invoice Date
L9815-12RV	Guy Brown Products	PK	Office Supplies (Paper, Toner)	AA Batteries	\$1.00			
P1054901-C	Guy Brown Products	CT	Office Supplies (Paper, Toner)	Copy Paper	\$1.00			
F812822	Guy Brown Products	BX	Office Supplies (Paper, Toner)	File Pockets	\$1.00		\$14.13	07/27/2005
H40M97423	Guy Brown Products	BX	Office Supplies (Paper, Toner)	Mini binder clip	\$1.00			
H40M97413	Guy Brown Products	BX	Office Supplies (Paper, Toner)	Small binder clip	\$1.00			

If the dollar amount in the Last Invoice Price column differs from the dollar amount in the Price column, you must revise the dollar amount in the Price column to have the new price appear the next time you add the favorite item to a requisition. To revise the item price, click the **Edit** button, input the Last Invoice Price in the field labeled Unit Price. Finally, click **Save**.



Tip: From the Profile tab, you can sort your favorites list, much like you can your worklist, by clicking the column heading you want to sort on.

LESSON 13: ePROCUREMENT ACCOUNT FAVORITES

You also have the capability to create a list of Favorite Accounts.

Adding an Account to Your Favorites List

Starting in the Profile tab, select the Account Favorites Tab. Click the green **Add** button, as shown below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 08/15/2005 10:47 AM

worklist search requisition profile LOGOUT HELP

User Profile

VU Contact Name:

VU Contact Phone:

VU Contact Email:

Ship To Id:

Attn:

Ship To Dept:

Ship To Room:

SAVE

Item Favorites Center Favorites Account Favorites

ADD

In the Account Number box, type the number of the Account you wish to add to your Favorites List. Next, click the green **Add** button. Your screen should appear as below:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 08/15/2005 10:47 AM

worklist search requisition profile LOGOUT HELP

Account Favorites

Account Number **ADD**

Current Account Favorites

Account Number	Description	
60150	Lab Supplies	DELETE

COMPLETE

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*Note: If you entered the wrong number, click the red **Delete** button to remove your entry.*

Click the green **Complete** button to finish adding the account number.

Adding a Favorite Account to Your Requisition

When creating a Requisition, you can now use one of your saved Favorite Accounts.

To use a Favorite Account, on the Distribution Page (in either the Default Distribution or Line Item Distribution section of the page) click the green **Account/Center Lookup** button:

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 08/23/2005 11:05 AM

worklist search requisition profile LOGOUT HELP

Return to Requisition ID: E000005712

DEFAULT DISTRIBUTION

*Account	*Center	Slid	Slac	*Method	Amount	Percent	
				amount	523.49		

ADD APPLY

ACCOUNT/CENTER LOOKUP

Total Amount: \$523.49

LINE ITEM DISTRIBUTION

Item Number	Item Description	Unit Price	Qty	UOM	Ext Amount
6587445556	Office trays	\$30.60	3	DZ	\$91.80

*Account	*Center	Slid	Slac	*Method	Amount	Qty	Percent	
				amount	91.80			

ADD

ACCOUNT/CENTER LOOKUP

In the Account Search, in the first drop-down box which reads “All Accounts” initially, click the down arrow and select Account Favorites:

Account Search

All Accounts

All Accounts

Account Favorites

Begins With

SEARCH

- 14000 - Accounts Receivable
- 14010 - General A/C Rec
- 17000 - Inventory
- 17157 - Plant Ops Purchases
- 18050 - Prepaid Miscellan
- 18100 - Prepaid Expenses
- 18730 - Oth Assets Deposits
- 18740 - Library Vendor Deposit

Then click the green **Search** button.

You will see your list of Favorite Accounts:

Account Search

Account Favorites ▾

Account ▾ Begins With ▾ **SEARCH**

60040 - Office Supplies
60150 - Lab Supplies

Select the appropriate account and click the green **Submit** button at the bottom of the page.

You will see that your account number has been added to your requisition:

DEFAULT DISTRIBUTION

*Account *	Center	Slid	Slac
60150	<input type="text"/>	▾	<input type="text"/>

ACCOUNT/CENTER LOOKUP

Maintaining Favorite Accounts

In the profile tab, select the Account Favorites tab. To remove an account from your Favorites List, click its respective **Delete** button.

Item Favorites Center Favorites **Account Favorites**

ADD

2 items found, displaying all items.

Account Number	Description	
60150	Lab Supplies	DELETE
60040	Office Supplies	DELETE

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LESSON 14: ePROCUREMENT CENTER FAVORITES

You also have the capability to create a list of Favorite Centers.

Adding a Center to Your Favorites List

Starting in the Profile tab, select the Center Favorites Tab. Click the green **Add** button, as shown below:

VANDERBILT UNIVERSITY *eProcurement* Last Successful Login: 08/23/2005 11:05 AM

worklist search requisition profile LOGOUT HELP

User Profile

VU Contact Name:

VU Contact Phone:

VU Contact Email:

Ship To Id:

Attn:

Ship To Dept:

Ship To Room:

SAVE

Item Favorites Center Favorites Account Favorites

ADD

Nothing found to display.

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In the Center Number box, type the number of the Center you wish to add to your Favorites List. Next, click the green **Add** button. Your screen should appear as below:

VANDERBILT UNIVERSITY *eProcurement* Last Successful Login: 08/23/2005 11:05 AM

worklist search requisition profile LOGOUT HELP

Center Favorites

Center Number	Description
1553100000	<input type="text" value="PURCHASING & STORES"/>

SAVE

Current Center Favorites

Nothing found to display.

COMPLETE

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You have the option of re-naming this center to something more familiar to you. To do this, delete the old name out of the text box and enter the new name.

Note: This will only change the name in your list; the actual name (as it appears in the general ledger) will not change.

Click the green **Save** button. Your screen should now appear as follows (if you decided to rename the center, your chosen name should appear):

VANDERBILT UNIVERSITY eProcurement Last Successful Login: 08/23/2005 11:05 AM

worklist search requisition profile LOGOUT HELP

Center Favorites

Center Number **ADD**

Current Center Favorites

Center Number	Description	
1553100000	PURCHASING & STORES	DELETE

COMPLETE

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*Note: If you entered the wrong number, click the red **Delete** button to remove your entry.*

Click the green **Complete** button to finish adding the center number.

Adding a Favorite Center to Your Requisition

When creating a Requisition, you can now use one of your saved Favorite Centers.

on the Distribution Page (in either the Default Distribution or Line Item Distribution section of the page) click the green **Account/Center Lookup** button:

VANDERBILT UNIVERSITY *eProcurement* Last Successful Login: 08/23/2005 11:05 AM

worklist search requisition profile LOGOUT HELP

DEFAULT DISTRIBUTION [Return to Requisition ID: E000005712](#)

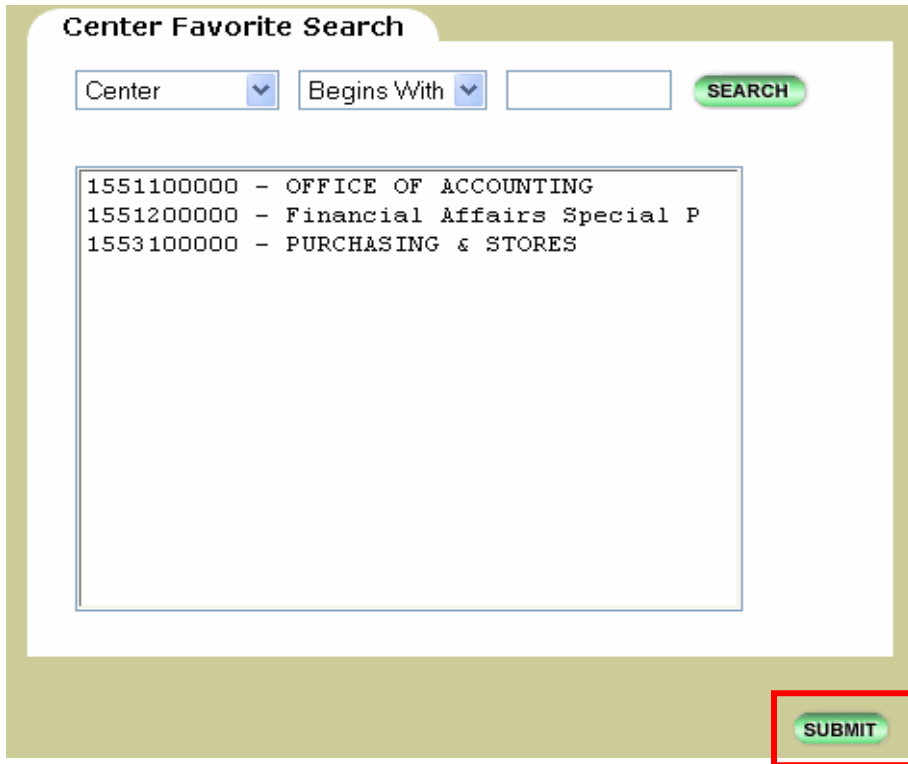
*Account	*Center	Slid	Slac	*Method	Amount	Percent	
<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	amount <input type="button" value="v"/>	523.49	<input type="text"/>	<input type="button" value="ADD"/> <input type="button" value="APPLY"/>
ACCOUNT/CENTER LOOKUP							
					Total Amount:	\$523.49	

LINE ITEM DISTRIBUTION

Item Number	Item Description	Unit Price	Qty	UOM	Ext Amount
6587445556	Office trays	\$30.60	3	DZ	\$91.80

*Account	*Center	Slid	Slac	*Method	Amount	Qty	Percent	
<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	amount <input type="button" value="v"/>	91.80	<input type="text"/>	<input type="text"/>	<input type="button" value="ADD"/>
ACCOUNT/CENTER LOOKUP								

In the Center Search section, your Favorite Centers will automatically be displayed. Select the appropriate center and click the green **Submit** button at the bottom of the screen:

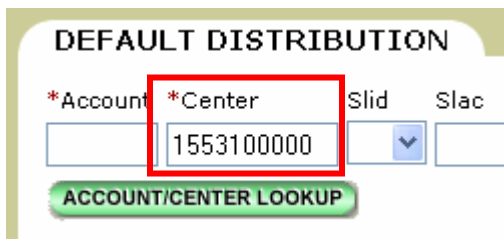


The image shows a web interface titled "Center Favorite Search". At the top, there are two dropdown menus labeled "Center" and "Begins With", followed by an empty text input field and a green "SEARCH" button. Below these is a large text area containing the following text:

```
1551100000 - OFFICE OF ACCOUNTING
1551200000 - Financial Affairs Special P
1553100000 - PURCHASING & STORES
```

At the bottom right of the interface, there is a green "SUBMIT" button, which is highlighted with a red rectangular box.

You will see that your center number has been added to your requisition:



The image shows a web interface titled "DEFAULT DISTRIBUTION". It features a table with the following columns: "*Account", "*Center", "Slid", and "Slac".

*Account	*Center	Slid	Slac
<input type="text"/>	<input type="text" value="1553100000"/>	<input type="text" value="v"/>	<input type="text"/>

Below the table is a green button labeled "ACCOUNT/CENTER LOOKUP". The "*Center" field, containing the value "1553100000", is highlighted with a red rectangular box.

Maintaining Favorite Centers

In the profile tab, select the Center Favorites tab. To remove an account from your Favorites List, click its respective delete button.



The screenshot shows a web interface with three tabs: "Item Favorites", "Center Favorites", and "Account Favorites". The "Center Favorites" tab is active. Below the tabs is a green "ADD" button. A message states "3 items found, displaying all items." Below this is a table with three rows. Each row has a "Center Number" and a "Description". To the right of each row is a red "DELETE" button. A red box highlights the "DELETE" buttons for all three rows.

Center Number	Description	DELETE
1551200000	Financial Affairs Special Projects	DELETE
1551100000	OFFICE OF ACCOUNTING	DELETE
1553100000	PURCHASING & STORES	DELETE

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You will be unable to rename a center once it has been added. Instead, delete the center from your Favorites List. Next, re-add it to the list and change the name accordingly. To add a completely new account, follow the procedure above.

LESSON 15: CATALOG-SPECIFIC ITEM FAVORITES

While shopping the eCatalog and the vendor-specific catalogs, you may have noticed that some of these sites house their own item favorites feature. These lists are very similar to the favorites list that you can create and maintain in eProcurement. However, when compared to the favorites list available in eProcurement, it is apparent that the item favorites feature available with the catalogs has some disadvantages:

- Their item favorites feature only allows you to store their catalog items, while the favorites list in eProcurement allows you to store in one place catalog items from multiple sources *and* noncatalog items.
- The item favorites list you create within the catalogs can be viewed and altered by any other user of the eProcurement system, while the favorites list available in eProcurement can only be viewed and altered by you.

Given these drawbacks, it is recommended that you these catalog-specific item favorites.

Of course, there is one exception! The exception relates to the centrally maintained “corporate” hot-lists in the eCatalog. Within the eCatalog, Procurement Services maintains lists of frequently purchased items. Similar items are grouped together into separate hot-lists. For example, there is a list called “Administrative Forms” from which you can order Travel Authorization Request forms, Stipend Request forms, etc. Other corporate hot-lists will be added in the future. The advantage to these corporate hot-lists is that all users of the eProcurement system can view and order off of them, but they cannot alter them.

To access a “corporate” hot-list, click the View My Hot-List button from the main eCatalog page:

VANDERBILT UNIVERSITY

Vanderbilt ePro Marketplace

Category Selections for Vanderbilt ePro Marketplace
(Refine your search by selecting from the detailed categories below. Or, you may enter Keywords to re-start your search at any time.)

[View My Hot-List](#) [Hot-List Maintenance](#)

Select From Categories

Chemicals & Bio Chemicals & Gas Materials (1,014) ▶	Furniture & Furnishings (3) ▶	Material Handling & Storage Equipment & Supplies (6) ▶	Printing & Photographic & Audio & Visual Equipment & Supplies (7) ▶
Cleaning Equipment & Supplies (2) ▶	Industrial Manufacturing & Processing Machines & Accessories (263) ▶	Medical Equipment & Accessories (2) ▶	Published Products (59) ▶
Domestic Appliances & Supplies & Consumer Electronic Products (13) ▶	Information Technology, Broadcasting & Telecommunications (5) ▶	Office Equipment & Supplies (352) ▶	Security & Safety Equipment & Supplies (4) ▶
Electrical Systems & Lighting & Components & Accessories & Supplies (1) ▶	Laboratory Measuring & Testing Equipment (2,116) ▶	Paper Materials & Products (65) ▶	
Food & Beverage Products (2) ▶	Manufacturing Components & Supplies (9) ▶	Power Generation & Distribution Machines & Accessories (12) ▶	

Next, click the “corporate” hot-list you want to view.

VANDERBILT UNIVERSITY

Vanderbilt ePro Marketplace

Hot List Selection

Hot List

Administrative Forms (Public)

Search for: [input] GO

- All Words
- Exact Words
- Any Words
- Without the Words



Tip: You will know it’s a “corporate” hot-list if you see the word “Public” displayed next to the hot-list name.

Once you select a “corporate” hot-list, you will see the following screen:

VANDERBILT UNIVERSITY

Vanderbilt ePro Marketplace

Hot List Items

Add To Cart

Search for: [input] GO

- All Words
- Exact Words
- Any Words
- Without the Words

Hot List Items

Enter multiple Quantities on various items then click here submit

	Item Number	Description	Unit	Price	Hot List Quantity	Delete?	Your Quantity	
1	60-002-411	CAPITAL EQUIP PURCH REQ	PK / 25	\$8.0100	1	No Access	<input type="text"/>	Add
2	60-002-490	ADMISSION REQ	PK / 25	\$14.6000	1	No Access	<input type="text"/>	Add
3	60-002-496	WHT WORK TICKET	CS / 1600	\$141.9400	1	No Access	<input type="text"/>	Add
4	60-002-497	MANILA WORK TICKET	CS / 1900	\$168.5500	1	No Access	<input type="text"/>	Add
5	60-002-498	BLUE WORK TICKET	CS / 1600	\$141.9400	1	No Access	<input type="text"/>	Add
6	60-002-523	TRAVEL AUTH EXP	PK / 25	\$8.3800	1	No Access	<input type="text"/>	Add
7	60-002-524	TRAVEL ADVANCES	PK / 25	\$8.3000	1	No Access	<input type="text"/>	Add
8	60-002-551	STIPEND REQUEST	PK / 25	\$5.6700	1	No Access	<input type="text"/>	Add
9	60-005-802	REQUISITION FOR SUPPLIES	PK / 50	\$5.7200	1	No Access	<input type="text"/>	Add
10	60-005-803	PURCHASE REQUISITION	PK / 50	\$12.1200	1	No Access	<input type="text"/>	Add

Enter multiple Quantities on various items then click here submit

From this screen, you can enter quantities for multiple items, then click Submit. Upon doing so, you will be taken to the Shopping Cart page, where you could proceed to check out using the procedure described previously in this guide.

GLOSSARY OF TERMS

Worklist	Your eProcurement to-do list. The worklist contains items that are (1) pertinent to your role in eProcurement and (2) can have action taken on them by you. From the worklist, you can track the status of a requisition by actions such as Saved, Submitted, Re-Submitted, or Rejected as long as your name is attached to that requisition by virtue of your Creator, Reviewer, and/or Executor role.												
eCatalog	eProcurement's multi-vendor marketplace; one location that enables Creators to access high volume, routine commodity items offered by various lab and office suppliers with whom Vanderbilt has contracts.												
Catalog Items	An item included in the eCatalog or an item from a vendor website that is accessible from eProcurement. This type of item can be added to a requisition by browsing an online catalog (i.e. – the eCatalog or the vendor's website), placing the item in a shopping cart, and checking out to return to eProcurement with the item.												
Noncatalog Items	An item that is not from the eCatalog or a vendor's website that is accessible from eProcurement. This type of item can be added to a requisition by simply keying in the appropriate information on the item, such as description, price, etc.												
Purchase Order (PO)	A legal offer to purchase goods or services that includes the terms and conditions of the offer, plus the appropriate information regarding delivery location and schedule.												
Requisition	A formal request for goods or services.												
Role	<p>Any viewing or administration privilege assigned on a node within a tree. A user can be assigned multiple roles. The following eProcurement roles will be assigned in STAR.</p> <ul style="list-style-type: none">• Administrator: Allows user to assign individuals certain eProcurement related functionality.<table><tr><td><u>Allowable Actions</u></td><td><u>Non-Allowable Actions</u></td></tr><tr><td>Assign Creator Role</td><td>Create requisitions</td></tr><tr><td>Assign Reviewer Role</td><td>Review requisitions</td></tr><tr><td>Assign Viewer Role</td><td>View requisitions</td></tr><tr><td>Assign Executor Role</td><td>Execute requisitions</td></tr><tr><td>Assign the Creator, Reviewer, or Viewer role to himself</td><td>Assign the Executor role to himself</td></tr></table>• Departmental Administrator: Allows user to assign individuals	<u>Allowable Actions</u>	<u>Non-Allowable Actions</u>	Assign Creator Role	Create requisitions	Assign Reviewer Role	Review requisitions	Assign Viewer Role	View requisitions	Assign Executor Role	Execute requisitions	Assign the Creator, Reviewer, or Viewer role to himself	Assign the Executor role to himself
<u>Allowable Actions</u>	<u>Non-Allowable Actions</u>												
Assign Creator Role	Create requisitions												
Assign Reviewer Role	Review requisitions												
Assign Viewer Role	View requisitions												
Assign Executor Role	Execute requisitions												
Assign the Creator, Reviewer, or Viewer role to himself	Assign the Executor role to himself												

certain eProcurement related functionality.

Allowable Actions

Assign Creator Role
Assign Reviewer Role
Assign Viewer Role

Non-Allowable Actions

Create requisitions
Review requisitions
View requisitions
Execute requisitions
Assign the Executor role to anyone

- **Creator:** Allows user to create, save and submit requisitions.

Allowable Actions

Create requisition
View requisitions
Save requisitions
Submit requisitions
Edit requisitions
Recall requisitions
Query requisitions
Delete requisitions
Enter requisition comments

Non-Allowable Actions

Assign any roles
Review requisitions
Execute requisitions

- **Reviewer:** Allows user to view and provide comments on requisitions pending approval. Reviewers are automatically assigned to requisitions based on center and dollar amount.

Allowable Actions

View requisitions
Disagree with a requisition
Agree with a requisition
Enter Reviewer comments
Query requisitions

Non-Allowable Actions

Assign any roles
Execute requisitions
Create requisitions
Edit requisitions

- **Executor:** Allows user to approve or reject requisitions. Executors are assigned to requisitions based on center and dollar range.

Allowable Actions

View requisitions
Approve a requisition
Reject a requisitions
Enter Executor comments
Query requisitions

Non-Allowable Actions

Assign any roles
Create requisitions
Edit requisitions

- **Viewer:** Allows user to view requisitions and related data.

Allowable Actions

View requisitions
Query requisitions

Non-Allowable Actions

Assign any roles
Create requisitions
Review requisitions
Execute requisitions
Edit requisitions

- **Buyer:** Allows user to view, edit, approve or reject a requisition. (Only Purchasing Agents in Procurement Services have this role.)

Allowable Actions

View requisitions
Approve requisitions
Reject requisitions
Enter Buyer comments
Query requisitions
Edit requisitions (expense account codes, vendor, item number, the extended line amount)

Non-Allowable Actions

Create requisitions