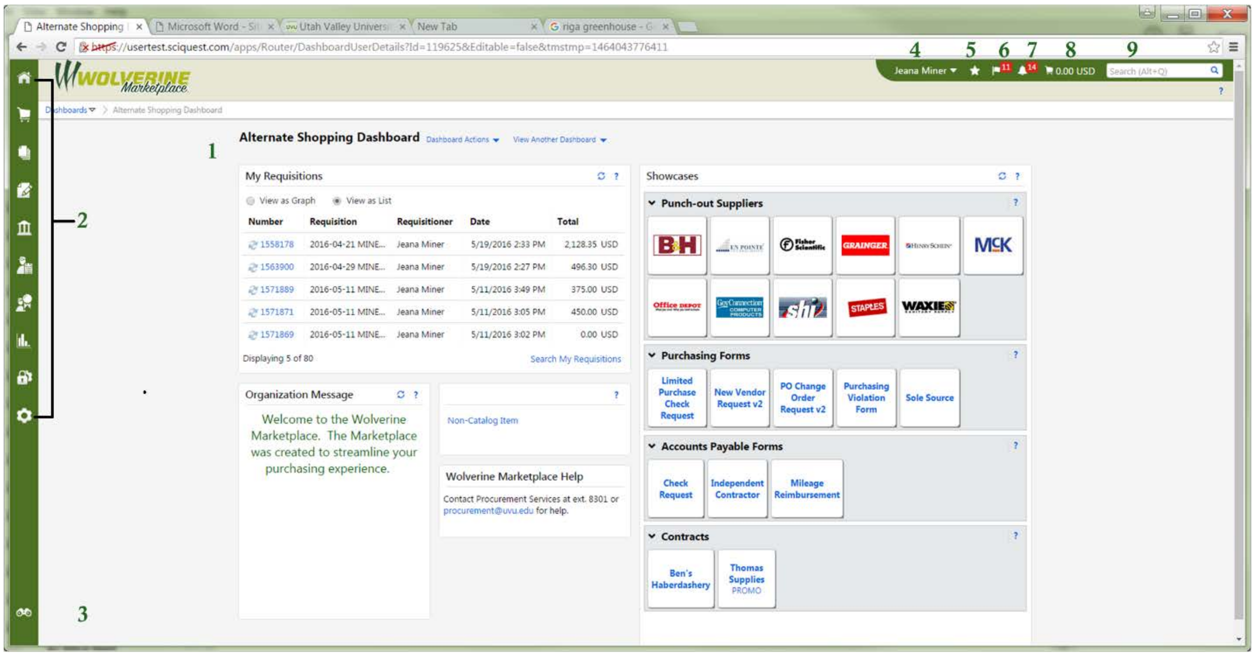
NAVIGATING THE USER INTERFACE

The user interface is designed to provide a clean, intuitive user experience. The site is easy to navigate and provides several features to help you locate and manage your tasks.



1. **Homepage**
   The homepage is the page to which the site will default upon log in. By default the Shopping page (shown in the image) is set as the homepage. However, any page can be configured as the homepage. Clicking on the homepage icon will return you to the homepage from anywhere in the application.
2. **Main Menu Options**
   On the left side of the screen are the main menu options. The menu options displayed depend on the permissions granted to the individual user. Each menu option contains sub-menu options (which may also have sub-menu options). Mousing over a menu option will display available submenu options. Like the main menu options, sub-menu options will vary based on permissions. To select a sub-menu item, simply click on the item and you will be taken to the appropriate area of the site.
3. **Menu Search**
   The Menu Search feature is located below the main menu options on the left side of the screen. This feature allows you to search for specific screens and functions in the application.
4. **User Menu**
   Access to your personal user information and functionality is located in the top banner. Your name is displayed with a drop-down icon to the right. Selecting the drop-down displays menu options including access to your user profile.
5. **Bookmarks**

The Bookmark feature allows you to save commonly used pages as bookmarks for quick access. You create and access bookmarks from this menu.

6. **Action Items**

   Action Items are tasks that require some action on your part. The Action Items list (located in the top banner) displays all action items assigned to you. You will primarily see items that need approval here. The number of action items is indicated to the right of the menu. Action items are grouped together by task. Clicking on the task group takes you to the appropriate area of the application to complete the action items.

7. **Notifications**

   Notifications are designed to alert you when an activity has taken place or something requires your attention. Notifications can be sent by email but several of them can be accessed from the Notifications menu (located in the top banner) in the application. The number of notifications is indicated to the right of the menu. Notifications are sorted by notification type and newer notifications are highlighted.

8. **Cart Preview**

   Cart Preview allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart and access the active cart. Clicking on the shopping cart icon will display the item list with basic information such as item image, name, quantity and price.

9. **Quick Search**

   The Quick Search feature allows a variety of searches, such as supplier profile, document, user profile, etc., to be performed from anywhere in the application. Available searches depend on the user’s permissions.

MAIN MENU OPTION DESCRIPTIONS

The table below contains a description for each main menu item. Your site may not display all of the following menu options. Menu items displayed depend on your role and permissions.

Homepage

Clicking on the **Homepage** icon will return you to the page that is configured as your homepage.

Shop Menu

The **Shop** menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, and access to carts and orders.

Orders & Documents

Menu items related to Document Search and Approvals are located in the **Orders & Documents** menu.

Catalogs & Contracts Menu

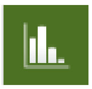
Tasks related to the setup and management of contracts are located in the **Catalogs & Contracts** menu. This includes searching for procurement contracts and viewing departmental contract documents.

Accounts Payable Menu

The **Accounts Payable** menu contains Invoice and Receipt information. It allows you to search for invoices entered on your orders. Enter receipts and see draft receipts.

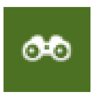
Sourcing Menu

The **Sourcing** menu will allow you to search for bids.



Reporting Menu

Reports are accessed from the Reporting menu. The sub-menus are organized by report type.



Menu Search

Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable and take you directly to the page.

MANAGING INDEX FAVORITES IN THE USER PROFILE

Users who frequently utilize different indexes can store these indexes on their profiles and quickly select them during checkout.

Users can create an unlimited number of code favorites. Index favorites can be created through the user profile.

STEP-BY-STEP

1. Click on your name on the upper right hand bar. Choose **View my profile**.
2. Go to **Default User Settings > Custom Field and Accounting Code Defaults**.
3. Click the **Codes** tab.
4. Click the **Edit** button next to the index line.
5. A new window opens and has a **Create New Value** button. Click it.
6. Search for the index you want, in the **Search For Value** section at the bottom using either the index number or the description.
7. Check the box next to the index you want and click the **Add Values** button.
8. To make an index your default, click on the index, check the default box and **Save**.
9. To delete an index, click on the index and click the **Remove** button.

MANAGING SHIP-TO ADDRESS IN THE USER PROFILE

The shipping address identifies where the supplier should ship the item(s). UVU has a central receiving address and all orders should be sent there. Exceptions to this will be determined by the buyer. Central Receiving is set as the default ship to in your profile. Office Depot and Staples have desk top delivery therefore you must select your department's ship to address for them. You can set your department ship to address as a favorite and choose it when placing an order at Office Depot or Staples. It is important to note that your requisition will be automatically returned if you use the wrong shipping address on it.

STEP-BY-STEP

1. Click your name in the upper right hand bar. Choose **View my profile**.
2. Got to **Default User Settings > Default Addresses**.
3. To add a new address, press the **Select Addresses for Profile** button.
4. To select an address using the search interface, use the following steps:
   a. Enter your department name or room number in the **Nickname/Address Text** field. Mail codes are not used and will not return results.
   b. Press the **Search** button.
   c. Select the radio button adjacent to the address desired.
   d. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.
5. To delete an address, select the address and click the **Delete** button. Do not delete the receiving address, it must be your default.

CONFIGURABLE DASHBOARDS

Configurable Dashboards allow you to customize and combine the content that you can view. Dashboards reduce the need to search for frequently used features by placing them all in a single location.

Creating Personal Dashboards

End-users with the appropriate permission are able to create personal dashboards. A personal dashboard can be seen and accessed only by the user who created it. As with organization dashboards, the available functions vary based on licensed products. In addition, the functions available to the end-user to include on the dashboard vary based on the user's permissions.

STEP-BY-STEP

1. Locate your User menu in the top-right banner. Click your name and then select **Dashboards**.
2. Click the **Create Dashboard** button.
3. Enter a name for the dashboard in the Name field.
4. Click **Create**.

Adding Dashboard Widgets

Widgets are the actual content included in the dashboard. For example, an organization message is included in the dashboard by adding an Organization Message Widget. Showcases are included by adding a Showcase widget. Other available widgets include Document Search, Product Search, Quick Links, Bookmarks, and more. The ability to add and access widgets on a dashboard is based on a user's permissions. End-users are not able to add widgets to which they do not have access on their personal dashboards. For example, if you do not have permission to access Document Search, you will not be able to add that widget to your dashboard.

STEP-BY-STEP

1. Create a new dashboard or open an existing dashboard for editing.
   Note: When you select to edit an organization dashboard, a message will display if changes have already been made to the dashboard that have not been published. You will have the option to restore or remove those changes.
2. If the dashboard has any existing widgets they are displayed. Click the button. The Add Widget window displays.
3. Available widgets are categorized. The display defaults to the All category, which lists all available widgets alphabetically. The categories available depend on your permissions and your organization's licensed products. Some widgets are available in more than one category - this is simply to help mitigate the need to access multiple categories. You can select an option in the Widget Category dropdown to help identify the widgets you want to add to the dashboard.
4. **Note:** Please see the table below for a list of widgets and the associated categories.

5. Click the **Add** button for the widget you are adding to the dashboard. A window displays.
6. The Name field defaults to the name of the widget (Document Search, Bookmarks, etc.). You can overwrite it with a customized name for the widget that displays on the dashboard. For example, you may want to change the "Product Search" widget name to "Search for Items".
7. Click **Save Changes**.
8. Repeat steps 2 - 6 for each widget you would like to add to the dashboard.

SHOPPING FROM A CATALOG

The punch out catalogs, located in the Showcase widget on the shopping dashboard, are available from vendors with whom we have contracts. This means that the items can be purchased without a bid and will not be reviewed by a buyer. Items that are restricted for purchase because of policies or campus standards are still restricted and should not be purchased.

STEP BY STEP

1. Click on the applicable catalog.
2. You are now in the vendor's online catalog. To return to the Marketplace without ordering items, click the **Cancel PunchOut** button in the upper left hand corner.
3. Shop as you would at an online vendor.
4. When you check out on the vendor site, you will be returned to Wolverine Marketplace. The options differ by vendor, sometimes it says check-out, sometimes punch-out.
5. Checkout in Wolverine Marketplace.

FILLING A NON-CATALOG CART

Non-catalog items are things you wish to buy that aren't available in the showcase catalogs. These items will go to a buyer and be subject to bidding rules.

STEP BY STEP

1. Click on **Non Catalog Item** on the Shopping dashboard.
2. Enter Vendor. You can begin typing and the vendor choices will autofill. You can search by clicking on **Vendor Search** or you can choose **not known**. If you choose **not known** then you will need to enter the vendor information in **Comments**. If the item needs to be bid, or you don't have a preferred vendor, then you can leave it without comments.
3. Type in the product description. This is the information that will go to the vendor to place your order and will also be the information used for a bid. Please be as descriptive as possible. The field only allows 254 characters, if you need more than that please add an external attachment. External attachments may be added at checkout. If you are placing an order from a quote then you may attach the quote, but the requisition must have the items listed as well.
4. Enter the catalog number if applicable, this can be a manufacturer number or item number as well.
5. Enter the quantity.
6. Enter the price estimate or exact pricing.
7. Choose the packaging from the drop down if you need something besides the default, each.
8. If you want to add an attachment for your department or purchasing please choose **Add Internal Attachments** and upload a document. Do not attach documents that must be included in a bid or documents that need to be sent to the vendor here. These documents must be added in **External Attachments** during checkout.

9. Fill in **Commodity Code**. You can search for available codes or type in from a list. Commodity Codes must be in upper case.
10. Click **Save and Add Another** to add another line.
11. Once you are done, click **Save and Close** to finish the cart.
12. **If you click Close all items entered will be discarded.**

CART OPTIONS

Once you have filled your cart and before you **Proceed to Checkout** or **Assign Cart,** you have several options.

1. You can name the cart. If you are assigning the cart this would be a good way to let someone know the reason for the purchase.
2. You can continue shopping, which will take you back to the home page by clicking on **Continue Shopping** in the upper right hand of the cart. You can then go into the same catalog again, or go to **Non-Catalog item** to add another item to the cart.
3. If you'd like to add a non-catalog item to the cart you may do so by clicking **Add Non-Catalog Item**. This will open up the **Non-Catalog Item** form. If you add a non-catalog item to a catalog cart then the entire requisition will go to a buyer.
4. You can empty the cart by clicking **Empty Cart**.
5. To print the cart click the printer icon.
6. Help is available by clicking **Help**.
7. The quantity can be changed on a non-catalog order. Simply click on quantity and type your new number.
8. You can select an item or all items by clicking on the check box next to an item or the check box next to **Select All** at the far right under **Assign Cart**. If you select an item or items you are able to do the following from the Perform an action drop down:
    - **Add to favorites**.
    - **Remove Selected Items**. You can also remove an item with the **Remove** button at the left of the item. If you shopped in certain catalogs this isn't available. It is always available for a non-catalog cart.
    - **Move to Another Cart**. You can also do this under More Actions drop down at the left of the item.
    - **Change Commodity Code**. This can be done here or by clicking on the commodity code box and retyping. Commodity codes must be in upper case. **Catalogs default commodity codes, so remember if it's something you are giving away you need to change the code.**
    - **Add to Draft Cart**. You can also do this at the left of the item.
    - For non-catalog items, you can also **Change Vendor**.
    - If you make a change to the requisition then you need to click **Update** above the vendor.

SUBMITTING A REQUISITION

OVERVIEW

Once you **Proceed to Checkout**, on the left hand side you can see:

1. **Requisition number**. This is a specific number that will be assigned to your requisition.
2. **Cart name**. The name you gave the cart or the default.
3. **Status** of the requisition.
4. **Total**.
5. **What's next for my order** shows you the next workflow step.
6. **Requisition**. This opens up to show you all parts of your requisition and has green checks to indicate specific areas are complete.

The areas are:

- **General**.
  - **Standing order**. Click edit in the upper right-hand corner and check the Standing Order button for open orders. This isn't available for catalog shopping
- **Shipping**. For all deliveries, except desk top deliveries, ship-to must be receiving. The ship-to address needs to be changed to your department ship-to for all desk top deliveries. These vendors are Staples, Office Depot, Computer Shop, and Warehouse Stores. The requisition will return if you use the receiving ship-to. It will also return if you use your department ship-to on a regular requisition.
- **Accounting Codes**. If you didn't set a default index, then you will need to fill it in. It will pop up immediately after hitting Proceed to Checkout. Put your index in or search for the index you need. This will populate the entire cart. If you had a default and want to change a line or all lines it must be done line by line.
- **Internal Notes and Attachments**. Internal notes are for University use only. They will not go to the vendor. This is a good place to attach approvals not caught in the workflow. For instance, Infrastructure approval emails.
- **External Notes and Attachments**. External notes go to the vendor. The requisition must be complete, but this is a good place to add text that wouldn't fit in the cart or instructions for the vendor.
- **Vendor Information**. This shows that you selected a vendor.
- **Taxes, Shipping and Handling**. This allows you to enter any shipping and/or handling charges.
- **Final Review**. Shows a summary of your requisition.

7. **Comments**. Allows you to see existing comments and to enter additional ones.
8. **Attachment Overview**. Shows you all attachments with this document.
9. **PR Approvals**. Lists the workflow steps your requisition has taken or will take. PRValidation indicates the documents status with Banner.
10. **PO Preview**. Has a preview of what the PO will look like at this stage. Keep in mind that a buyer can change your non-catalog item requisition, if necessary.

Click **Submit Requisition** at the top to submit you requisition.

If you are a shopper, click **Assign Cart** and select a requestor.

REQUISITION APPROVAL

Before an order can be completed, it will have to go through an approval process. In this process, requisitions are assigned to one or more approvers via steps in the workflow. Approvers review the document and approve or reject the document as a whole.

ABOUT WORKFLOW

The workflow process begins when a cart is submitted and continues through when the purchase order is sent out to the supplier. The goal of workflow is to make sure that all orders sent out are valid. For example, workflow may involve financial approvals. In other cases, it may verify that the certain types of items (such as capital assets) are ordered correctly through the system.

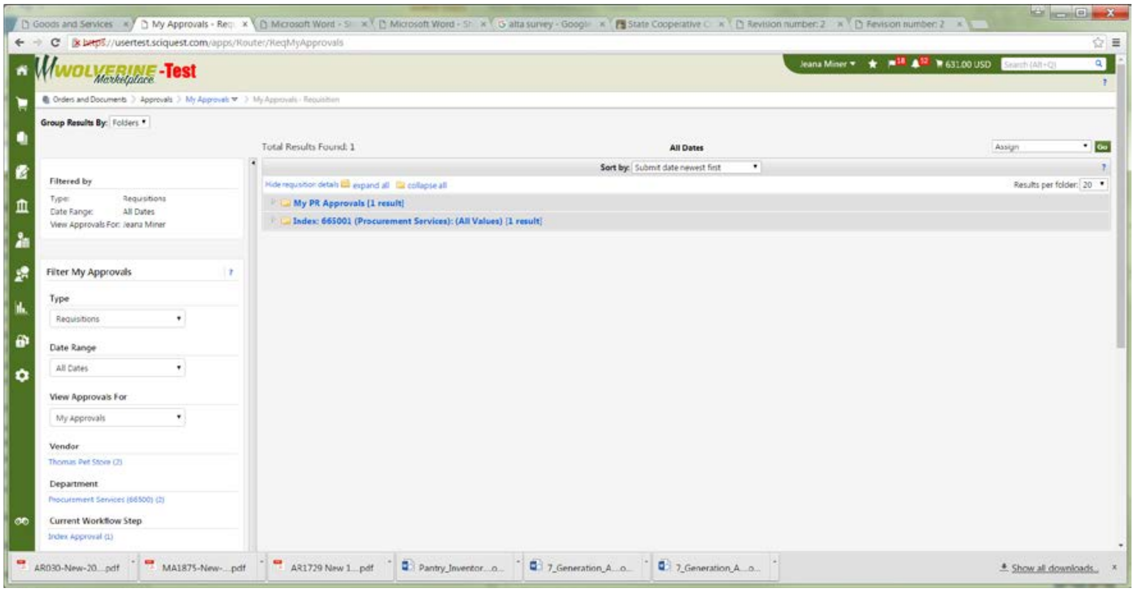
Requisition and Purchase Order Approval Basics

- The term approver is used to describe someone that is responsible for approving purchase requisitions.
- In order to approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment and/or individual permissions being granted by Finance and Business Services.
- Approvers can choose whether or not to receive notification when an order requiring approval lands in their "queue." This is set up via the user's profile.
- There are two types of approvals: 1) Manual approvals, requiring human intervention, and 2) System approval, which is automatic.
- An entire requisition can be approved or one or more line items in the requisition can be rejected. If part of a requisition is rejected (one or more line items), the remaining line items continue in the process.
- Comments and attachments can be sent "back and forth" between requisitioners and approvers during the approval process.
- Requisitions can be returned from Banner, to the requisitioner, for updates and re-processing.
- If a line item or the entire requisition is rejected (by an individual or the system), the rejection notice will show up in PR History. If the user is set up to receive notifications for rejections, they will receive an email also. This email contains the rejection note entered by the approver.
- Approvals are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order forwarded).
- Requisition approvals can be done via email.

REQUISITION APPROVAL:

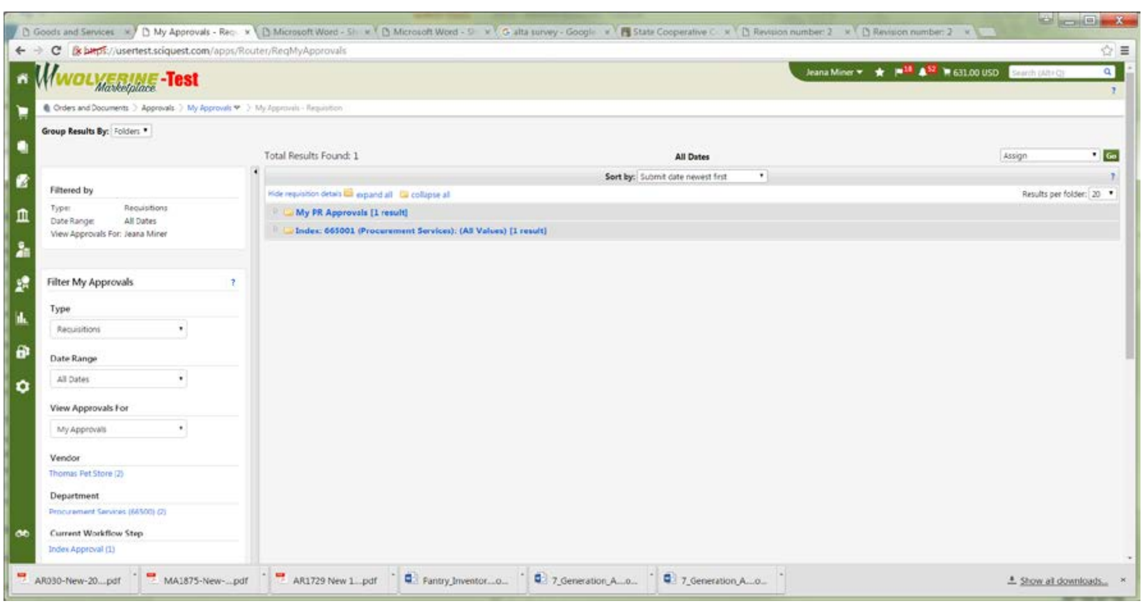
My Approvals

Screen Approval activity is done from the My Approvals screen. From this screen you can access and approve all documents that require your approval.



FOLDER VIEW VS. LIST VIEW

There are two different view options for My Approvals screen. The **Folder** view groups the documents by approval folder. The **List** view displays all documents in a list format. By default, the list will be sorted by date/time but there are several sorting options including document number and document title. The image above shows the **My Approvals** screen in **Folder** view. The image below shows the **My Approvals** screen in **List** view.



DOCUMENT TYPE

The My Approvals screen displays requisitions needing your financial approval. There are other document types available on the drop down list that pertain to Procurement functions. You are able to choose them, but you won't see any documents for approval.

FILTERS

Filters are available to help you narrow down the list of documents that are available for approval.

AVAILABLE ACTIONS

There are several actions you can take directly from the **My Approvals** screen:

1. **The Action Button**: A document may have an active button in the **Action** column. Generally, if the document is in your personal approvals folder, the button will default to Approve. You can click the button to approve the document. If the document is in another folder, but is eligible to be assigned to you, the button will default to **Assign**. You can click the button to assign the document to yourself for approval.
2. **The Action Menu**: The action menu allows you to perform an action on one or more documents. Available options include Assign, Approve, Forward and more.

DETAILS AND "TIPS AND TRICKS" FOR REVIEWING DOCUMENTS:

- When a document is in your personal folder, the approver owns it. Only an administrator can move a document out of this folder. Documents can automatically be placed in the in this folder for financial workflow or moved from a shared workflow folder and into your personal folder. When an order is moved from a shared folder to someone's folder, the approver is indicated to all users from the shared folder.
- Shared workflow folders are folders that can be accessed by one or more approvers. In most cases, there will only be one approver per folder. The actual folders that display for an approver is dependent on what they are responsible for approving. Therefore, an approver might see one, two, or twenty folders.
- Click the document number to open and view the document.
- To move multiple documents to your folder, click the Select checkbox to the right of each document, then select Assign in the drop-down box.
- The sort order for documents is remembered when an approver leaves the screen and returns. This affects all workflow queues that the user has access to. For example, if you are responsible for approving orders for three different account codes, you might choose to sort them by department. The next time you log in to approve an order, your sort preference will be remembered.

REQUISITION EMAIL APPROVAL

Email approvals allow an approver to receive an email with important information regarding the order to approve or reject, along with the ability to approve or reject the requisition from the email. Approvers will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action may be taken.

HOW DOES IT WORK?

When email approval is enabled, organizations will, by default, require approvers to enter an email approval code to take action from the webpage link, therefore ensuring the authorized approver is the person taking action on the requisition or purchase order. Approvers maintain an email approval code in their user profile. When the approver accesses the approval webpage, they enter the email approval code and are authenticated as the authorized approver. They may also use the link to log into the system and approve from there.

WHO CAN APPROVE ORDERS BY EMAIL?

- All approvers will be able to approve by email. Only approvers who have set up an approval code in their profile will be able to use that feature.

WHAT INFORMATION IS INCLUDED WITH PURCHASE REQUISITION EMAILS?

- Summary information including Cart Name, Requisition #, Prepared by user, Prepared for user (if different than prepared by user), Workflow Folder , Priority, No. of line items, and Total amount/currency of the requisition.
- Line level information including Supplier Name, Item number (number of the line on the requisition, Item 1, Item 2, etc.), indication if the item is a non-catalog item, indication if the item is rejected or withdrawn, Product Description, Catalog Number, Quantity, Unit Price, Extended Price, Custom Catalog Attributes (if applicable) - Displays if the attribute is active and has a value, Contract number and name (if applicable), Size/Packaging, Taxable, Capital Expense, Commodity Code, Product flags - listed if true for the item, Custom field values – line values or if line is different from header value, Internal Notes - if populated, Internal Attachments - if present, and External Attachments - if present.
- Note: If the requisition contains more than ten lines, a message displays indicating user must login to see the details. If the item was rejected or withdrawn in a previous approval step, only the Product Description and Catalog number displays for that line.
- Form data including the name and type of form that was used to populate the line item(s).
- Account Codes information including the field, value, and description. For example: Project: 123, Services.
- Additional information such as the comments, the list of other approvers, names for internal attachments and supplier attachments, shipping address.
- A hyperlink to take action on the requisition. Note: This link does not display if the approver does not have an approval code set up.

HOW DO I TAKE ACTION

- After reviewing the order details in the email, the approver will select the link to access the secure approval webpage.

- The webpage that launches will render in the approver's site colors, and will display limited document information to confirm the approver has landed on the appropriate approval page.
- The approver will have the same actions that are available to them in the site, for taking action on entire documents. Possible actions include: approve, reject, assign to myself, and return to requisitioner.
- The approver will select the desired action and enter a comment if they choose. Approvers must enter their email approval code to submit the action for organizations where it is required.
- Once the action is complete, the approver receives a confirmation webpage. The action is logged in history as having been taken via email. Comments are also logged to Comments and history.

If action has already been taken by another approver in a shared folder, the approver will receive a message that action has already been taken on the document.

CREATING A RECEIPT FROM A PURCHASE ORDER

If you pick-up items directly or the item didn't go to the Warehouse, you are able to go in and create a receipt yourself. Desk-top delivery items are an exception, and so are items from a standing order. Remember that when you create a receipt you are attesting to the fact the item is here.

STEP-BY-STEP

1. Access the PO that is associated with the goods or services being received. It is associated with your requisition.
2. Open the purchase order by selecting the **PO number**.
3. From the **Document Actions** drop-down box, select **Create Quantity Receipt**.
4. The receipt will be automatically populated with the PO information, including the remaining number of items to be received.
5. Add any additional information, such as **Packing Slip or Notes**.
6. **Review** the line level data. Enter the appropriate **Quantity** value for each line. Select **Received** (default) for the **Line Status**, which indicates the item/service was received. Make additional line level updates if needed.
    a. To remove a line from the receipt, select the **Remove Line** button for the item. To remove multiple lines, enable the checkbox for the items and choose **Remove Selected Items** from the **For Selected Items** dropdown above the item list and click go.
7. Click **Save Updates**, then **Complete**. The **Receipt Number** displays on the screen. Once a receipt is created, the receipt date is saved, which indicates the date the goods were actually received and the receipt complete date, which indicates when the receipt was entered in the system.