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1 GETTING STARTED

1.1 Introduction

What is MUSC Marketplace?

The MUSC Marketplace is our e-Procurement solution and provides efficient processes for ordering goods and services. The Marketplace includes a number of electronic catalogs with MUSC specific pricing. It also includes Punch-Out to many of our most used vendors.

Requisitioning through this one tool streamlines the buying process and allows for electronic routing for approvals. The system also provides a detailed order history and reporting. This improved reporting allows MUSC Purchasing to leverage the University’s buying power and recruit new preferred contract vendors.

The MUSC Marketplace is the official tool for purchasing goods and services. It is integrated with SmartStream (our system of record for financial transactions) and with UMS. Information will also flow to our Data Warehouse so it can be used in the WebApps reporting.

Navigating

The MUSC Marketplace home page uses common web-based navigational elements such as a slide-out menu, an information panel, and breadcrumbs.

The slide-out menu, located on the left side of the screen, keeps tasks hidden until they are needed. Tasks are also grouped together to allow the experience to be more user friendly. For example, by clicking the Shop icon on the slide-out menu, you will have the capability to navigate to the Shopping home page, view forms, and search suppliers.

The information panel, located on the left side of the screen, keeps users updated with organizational messages about the Marketplace and suppliers, system messages about the status of the Marketplace, links to State contracts, and contact information (phone number and email address) for the Marketplace Help Desk.

Breadcrumb navigation is used to more easily navigate the Phoenix user interface by providing a “map” of how users arrived at their current page by creating links to previous pages. This also allows them to go back to a previous location without using the browsers back button.

2 MANAGING YOUR PROFILE

In the Marketplace, user-specific profiles determine what permissions you have been granted, when you will receive e-mail notifications and the default personal data that will
carry over onto your orders. This information is typically updated when you log in for the first time and on an as-needed basis going forward.

Your business officer (or other designee) has identified your role in the Marketplace, Shopper, Requestor, or Approver. Each role is associated with a common set of permissions. You may view these permissions but you do not have the authority, or access required to change these permissions. If you require a change to your permissions, please contact your business officer.

To view your role(s) and permissions, click on your name on the top menu bar and select View My Profile. Under the heading User Access and Security click the Assigned Roles link.

In order to save you time when placing orders, your profile settings will auto-populate your personal data on your orders. When you first log into the Marketplace, we suggest that you navigate to your profile and review the current information that was preloaded. You will be able to make changes to your basic information such as first name, last name, telephone number and e-mail address. Additionally, you will be able to modify your shipping addresses and accounting codes. These defaults are applied to each order you place. To gain flexibility in placing orders, you may add addresses, shipping instructions, and Approvers to select from when a value other than your default is required.

Finally, you will be able to select from a variety of e-mail communications that are designed to keep you informed about your Marketplace orders.

NOTE: Before placing your first order in the Marketplace, please note that your shipping address is incomplete. It is mandatory that you modify your shipping address information with a Department and a room number, floor or suite for delivery personnel. Failure to modify your shipping address will result in an error message and your order will not be placed.

2.1 Profile Basics

Objective: To verify (and update), if necessary, information in the User’s Name, Phone Number, Email, etc. section of My Profile.

Key Points:
- Your information was preloaded during account creation. However, you may change your first and/or last name, and add your telephone number and e-mail address as you want it to appear on requisitions and purchase orders you create.

Scenario: Record your first name, last name, telephone number and e-mail address as you would like them to appear on your purchase requisitions and resulting purchasing orders.

1. Click “Your Name” on the Top Menu Bar.
2. Click “View My Profile” link.
3. Click “User’s Name, Phone Number, Email, etc.” under User Information and Settings heading.
   (Update first and/or last name as needed.)
   (Update phone number as needed.)
4. Click “Save” button.

2.2 Add a Requestor as a Cart Assignee

Objective: To set up a preferred requestor as a cart assignee and add alternate requestors as cart assignees in the Cart Assignees link under the Default User Settings heading of User Information and Settings under “My Profile”.

Key Points:
- It is recommended that you set up multiple requestors including a preferred, and one or more alternates.
- When preparing a shopping cart, requestors will appear in the drop-down list under your default requestor.
- Change your default requestor as needed when your requestor is away for a number of days.
- If a desired requestor is not available for selection, inform your systems administrator.

Scenario: Add and delete department requestor and select your default requestor.
1. Click “Your Name” on Top Menu Bar.
2. Click the “View My Profile” link.
3. Click “Show All” under “User Information and Settings” heading.
4. Click “Cart Assignees” under “Default User Settings” heading.

2.2.1 Add Requestors
1. Click “Add Assignee” button.
2. Enter last name of desired Requestor in User Search window.
3. Click “Search” button.
4. Click [select] in the Action column to the right of the desired Requester.
5. The Requester you have chosen will populate under the Name column of My Cart Assignees

2.2.2 Delete Requester
1. Click “Remove” button under the Action column to the right of the Requestor that you would like to delete.

2.2.3 Select Default Requester
1. Click “Set as Preferred” button under the Action column to the right of the Requestor you want as the default.

2.3 Add Ship To/Bill To Addresses

Objective: To add, change and delete shipping and billing addresses and to select a default shipping and billing address in the Default Addresses section of “My Profile”.
Key Points:
- Include room number and any other information needed for delivery personnel.
- If a building address is not available for selection, contact your business officer.

Ship To:
1. Click “Your Name” on Top Menu Bar.
2. Click “View My Profile” link.
3. Click “Default Addresses” under User Information and Settings heading.
4. Click “Ship To” tab under Default Addresses.

2.3.1 Add a new shipping address
1. Click “Select Addresses for Profile” button.
2. Start typing your street name under Nickname/Address Text and click “Search” button.
3. Choose the radio button next to the appropriate address.
4. Enter the Dept. and Rm. information (it is required).
5. Click “Save” button.

2.3.2 Review and update previously selected shipping address information
1. Click on shipping address to update under “Shipping Addresses” column on the left.
2. Update Dept. and Rm. information.
3. Click “Save” button.

2.3.3 Delete shipping address
1. Click on shipping address to delete under “Shipping Addresses” column on the left.
2. Click “Delete Address” button.

2.3.4 Select default shipping address
1. Click on shipping address to set as default under “Shipping Address” column on the left.
2. Check the “Default” box under “Edit Selected Address” section on the right.
3. Click “Save” button.

Bill To:
1. Click “Your Name” on Top Menu Bar.
2. Click “View My Profile” link.
3. Click “Default Addresses” under User Information and Settings heading.
4. Click “Bill To” tab under Default Addresses.

2.3.5 Add a new billing address
1. Click “Select Addresses for Profile” button.
2. Click the arrow for the dropdown menu under “Select Address Template” and select “Bill To”.
3. Check the default box under “Edit Selected Address” section on the right.
4. Click “Save” button.

2.4 Add MUSC Accounting Codes

Objective: To understand the proper use of charging instructions and learn how to maintain the list of Accounting Codes in your profile.

2.4.1 Add Accounting Codes to your Profile

1. Click “Your Name” on Top Menu Bar.
2. Click “View My Profile” link.
3. Click “Custom Field and Accounting Code Defaults” under User Information and Settings heading.
4. Click “Codes” tab on menu bar.
5. Click “Edit” button on custom field name line for Project-Year.
6. Click “Create New Value” button.
7. Enter project number in the “Project-Year Value” or “Description” in the “Search for Value” window.
8. Click “Search”.
7. Check “Select” box next to the desired value.
8. Click “Add Values” button.
9. Click “Close” button.

2.4.2 Delete Accounting Codes

1. Click “Edit” button on custom field name line.
2. Click on “Project-Year” to be deleted in the left column.
3. Click “Remove” button in “Edit Existing Value” window.
4. Click “Close” button.

2.4.3 Select default Accounting Code

1. Click “Edit” button on custom field name line.
2. Click on “Project Year” you want to be your default in the left column.
3. Check “Default” box in “Edit Existing Value” window.
4. Click “Save” button.
5. Click “Close” button.

2.5 Add E-Mail Notifications

Objective: To establish settings in MUSC Marketplace to automatically receive e-mail notifications regarding the status of your requisitions and purchase orders.

Key Points:
- As a new user, opt to have more e-mail notifications sent rather than less to keep you informed.
As time progresses, deselect any e-mail types that you do not find helpful.
Remember that you can link directly to the requisition or purchase order in question from these e-mails.
Procurement has created default notifications already based on your role in Marketplace. **DO NOT** attempt to turn off notifications if you do not know the impact of doing so, as it may result in delays in placing orders and/or paying vendors.

**Scenario:** Select e-mail preferences that will notify you as a Shopper/Requestor when either your individual purchase requisition lines or entire purchase order is rejected by an approver and when your purchase order is sent to the supplier. (Approvers can additionally opt to have an e-mail sent to them that informs them when a requisition is pending their action.)

1. Click “**Your Name**” on Top Menu Bar.
2. Click “**View My Profile**” link.
3. Click “**Email Preferences**” under User Information and Settings heading.
4. Select the dropdown menu to the right of “**PR Pending Workflow Approval**” under **Shopping, Carts & Requisitions** heading, this selection sends e-mail to approvers informing them of a requisition pending their action. You can elect to receive No notification, Email notification, Notification under the Notifications link on the Top Menu Bar, or both Email and Notification under the Notification link on the Top Menu Bar.
5. Select “**PR Line Items Rejected**” ... sends to requestor.
6. Select “**PO Line Items Rejected**” ... sends to requestor.
7. Select “**PO Sent to Supplier**” ... sends to requestor.
8. Select “**PO Line Item Backorder Notice**” for suppliers with the technical capability such as VWR ... sends emails to Requestor if item is on backorder.
9. Select notification type for any other preferences.
10. Click “**Save**” button.

### 3 SEARCHING FOR ITEMS – SEARCH BASICS

**Objective:** To explore three basic methods for locating products in the Marketplace based upon supplier type: Hosted Catalog, Punch-Out Catalog and Non-Catalog. The type of supplier you select will influence the manner in which you search for products and process your order in the Marketplace.

**Note:** The Marketplace suppliers are already active in our SmartStream supplier database so using these suppliers means that there is no additional work on the part of the user to set up a supplier before placing an order. However, if you do not find the vendor you need in Marketplace, you may request the vendor be set up using the New Vendor Request form.

**Hosted Catalog Suppliers**

Two of the suppliers found in the Marketplace are Hosted Catalog Suppliers. These suppliers have provided MUSC with their electronic catalogs which contain negotiated MUSC prices and/or terms.
Users may quickly search through these hosted catalogs using the single-line search option located at the top of the page for Product Search. In the following modules in this section, we will demonstrate advanced searching techniques.

**Punch-Out Catalog Suppliers**

Suppliers who have provided a link to their on-line catalog with MUSC rather than provide their products through the shared Hosted Catalog are known as Punch-Out Suppliers. Typically, these are vendors for products where only one university contract exists or where products often require custom configuration (e.g., Dell computers). Several of these suppliers have been available for on-line shopping through the specialized MUSC sites so searching in these catalogs may be familiar.

Users may shop through these catalogs by clicking on the Supplier’s company logo in the Punch-Out Catalog section of the Marketplace homepage and select desired items from the external catalog which will add the products to the user’s Shopping Cart in the Marketplace. The Checkout process is completed in the Marketplace. See Section 4 for more details.

**Non-Catalog Suppliers**

The remaining suppliers in the Marketplace are known as Non-Catalog Suppliers. Orders are placed to these suppliers in the Marketplace in a variety of circumstances. For example, an on-line catalog may be unavailable for that vendor in the Marketplace or a particular item from a Hosted Catalog supplier is not available in the on-line catalog.

Users may requisition for products using the Non-Catalog form option in the Marketplace. See Section 4.2 for more details. Please note that this form is simply a mechanism for placing a non-catalog item in your shopping cart. The checkout process is identical to hosted catalog and external catalog items.

### 3.1 Search Hosted Catalogs

#### 3.1.1 Search Hosted Catalogs by Product

**Objective:** To find products in the MUSC Marketplace hosted catalogs by searching the product description using Advanced Search Options.

**Key Points:**

- One of the most powerful features of the Marketplace is its robust search engine that allows you to search online catalogs for goods and services using a variety of search techniques.
- Searching is quick – use different search argument combinations and compare results.
- Product search results are returned showing the best value first.
- Try phrasing your search in different ways and notice how the results differ.
- Avoid using plurals in search arguments (enter “beaker” not “beakers”).
- In addition to Search Results, you can refine and filter your search. On the left side of the screen, notice you can refine and filter by keywords, by supplier, by category, or by packaging unit of measure.

**Scenario:** Search for and identify the lowest-priced item.

1. From the Marketplace homepage enter an item description such as “beaker” in the Shop search box.
2. Press Enter key or click “Go” button.
4. In the Add Keywords search box, add keyword “glass”.
5. Press Enter key or click “Go” button.

### 3.1.2 Search Hosted Catalogs by Supplier

**Objective:** To find products in the Marketplace's hosted catalogs by searching by supplier using Advanced Search Options.

**Key Points:**
- A drawback of browsing by supplier is that it does not allow you to see comparable products from other vendors. Consider limiting its use to when you are searching for a previously purchased item from a specific vendor.

**Scenario:** Search for a beaker from Sigma-Aldrich.
1. Click the “Advanced Search” link under the Shop search box.
2. Type “Sigma-Aldrich” in “Supplier” search box.
3. Type “beaker” in “All of These Words” search box.
4. Click “Search” button.

**or**
1. Type “beaker” in the simple search box.
2. Press Enter key or click “Go” button.
3. Under “Filter Results” on left side, select “Sigma-Aldrich” under “By Supplier”.

### 3.1.3 Search by Category

**Objective:** To find products in Marketplace’s hosted catalogs by drilling down to a category (commodity grouping) to a specific item using Advanced Search Options.

**Scenario:** Search for a test tubes.
1. Type “test tubes” in the Shop search box on the Marketplace homepage.
2. Press Enter key or click “Go” button.
3. In the Filter Results, under “by Category” choose “more…”
4. Chose “test tubes” to display results.
5. Identify the test tubes rack you want.
6. Select “Add to Cart”.

### 3.1.4 Search Hosted Catalogs by SKU (Quick Order)

**Objective:** To search quickly for an item where the SKU is already known.

**Key Points:**
Search in Hosted Catalog by SKU (‘Quick Order):
- Searches both the supplier and manufacturer (where provided by the supplier) catalog numbers.
- If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, the product is automatically added to the shopping cart.
  If more than one product is found, Search Results are presented to allow for the selection of the appropriate product.
• If no products are found for the entered catalog number, a link to the non-catalog form appears. Select this link to create a non-catalog request for this catalog number. Optionally, you can search based upon Item Description to locate a comparable item in the hosted catalog.

Scenario: Using the Quick Order approach, place the following item in your cart – 11271318103

1. Click the “Quick Order” link under the Shop search box
2. Enter the catalog numbers in one of the five fields provided - **11271318103** (Add to Cart Confirmation pops up below the Quick Order box.) Note: You are only searching Hosted Catalogs and the punch out catalogs which are linked.

**Tip:** If the exact catalog number is not known, select the “Include similar terms” checkbox. The search engine will try to find products with catalog numbers that are similar to the one entered. This check box is retained by the system for all future searches and must be explicitly turned off to disable this type of searching.

### 3.2 Search Punch-Out Catalogs

#### 3.2.1 Search for Computers (Dell)

**Objective:** To select items from a Punch-Out catalog where you connect to the supplier’s external site from the MUSC Marketplace and automatically return to MUSC Marketplace to complete your order.

**Key Points:**

- Requisition lines from external catalogs **cannot** be included with other requisition lines from other suppliers. MUSC chose to requisition from one supplier for each purchase order.
- When returning to the Marketplace, it is recommended that you do not go back out to the same external catalog to modify the purchase. This may pose a risk that items from the supplier are duplicated.

**Scenario:** Select a computer from Dell.

1. Click the Dell logo in the Punch-Out Catalog area. (Screen indicates “Connecting to Punch-out. Please wait”).
2. Select the system you want to purchase – click “add to cart”.
3. Select “Create Order Requisition”.
4. Click “Continue”.
5. Click “Submit Order Requisition” (You are automatically returned to the MUSC Marketplace.).

#### 3.2.2 Search Punch-Out Suppliers - Laboratory Supplies

**Objective:** To select items from a Punch-Out catalog where you connect to the vendor’s external site from the Marketplace and automatically return to the Marketplace to complete your order.
**Key Points:**

- Requisition lines from external catalogs cannot be intermixed with other requisition lines.
- When returning to The Marketplace, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

**Scenario:** Select Fisher brand Filter Paper Circles from Fisher Scientific.

1. Click “Fisher Scientific” logo in “Punch-Out Supplier” area (Screen indicates “Redirecting to Supplier. Please wait.”).
2. Click “Browse all Products”.
3. Click “Filtration under “Consumables and Supplies””.
4. Click “Filter Paper”.
5. Click “Quantitative Filter Paper”.
6. Click “Fisherbrand™ Qualitative-Grade Filter Paper Circles”
7. Add 4 to quantity for “Grade P8; Dia.:12.5cm” and Click “Add to Cart”.
8. Click “Shopping Cart” in top right corner of website.
9. Click “Return Cart to Purchasing Application”.
10. Click “Submit” (you are automatically returned to the Marketplace).

**3.2.3 Search Punch-Out Suppliers - MRO/Facilities (Grainger)**

**Objective:** To select items from an external catalog where you connect to the vendor’s external site from the Marketplace and automatically return to the Marketplace to complete your order.

**Key Points:**

- Requisition lines from external catalogs cannot be intermixed with other requisition lines.
- When returning to the Marketplace, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

**Scenario:** Select floodlights from Grainger.

1. Click “Grainger” logo in “Punch-Out Supplier” area (screen indicates “Connecting to Punch out. Please wait.”).
2. Enter “floodlight” in the Search field on the Grainger home page.
3. Select a category of floodlights to display list of products.
4. Enter quantity in line of item you desire.
5. Click “Add to Requisition” button.
6. When you are done shopping click “Continue to Requisition Form”.
7. Click “Continue” button at bottom.
8. Click “Submit Requisition” button (you are automatically returned to the MUSC Marketplace).
3.2.4 Search External Suppliers - Office Supplies (Staples)

Objective:  To select items from an external catalog where you connect to the vendor’s external site from the Marketplace and automatically return to the Marketplace to complete your order.

Key Points:

- Requisition lines from external catalogs cannot be intermixed with other requisition lines.
- When returning to The Marketplace, it is recommended that you do not go back out to the same external catalog to modify the purchase. If you do, be sure to review details and check to see that you do not have duplicate products purchased in error.

Scenario:  Select a case of pens from Staples.

1. Click “Staples” logo in “Punch-Out Catalog” area (screen indicates “Connecting to Punch out. Please wait.”).
2. Type “post it notes” in the search field then click “Search”.
3. Select “Post- it Notes” check box to narrow your results by category. Click “Update”.
4. Click on “Assorted” under Note Color to narrow results further. Click “Update”.
5. Add 10 to quantity under first item listed and click “Add to Cart”.
6. Click “Check Out” (Note: Minimum order must be $50.00.)
7. When your order is complete, click “Submit”. (Automatically returns you to the Marketplace where you will complete the ordering process).

4 ORDER BASICS

4.1 Hosted and Catalog Orders

Objective:  To illustrate the full requisition process, from searching for a product, to placing an order.

Key Points:

- Changes can be made at each step if needed.
- When you have located the products that you wish to purchase, you can add the products to your cart by clicking on shopping cart rather than select “Add to Current Cart” and click “Go”.
- Notice how your “Active Cart” updates with item total and dollar amount total.
- In the scenario below, items are added using the product search results which is just one of several methods of adding an item to a Cart. Other methods include product details pop-up, product comparison, Favorites, Fast Order, Non-Catalog Order form and completed requisitions.

Scenario:  Search for and purchase Penicillin-Streptomycin. Before you have completed the order, change the quantity from 1 to 5 and then place your order.

1. Enter “11074440001” in the Shop Search box.
2. Press Enter key or click “Go” button.
3. Quantity of 1 is pre-populated.
4. Click “Add to Cart”.
5. Click “Cart” icon in the Top Menu Bar.
6. Click “View My Cart” button
6. Enter “5” in quantity on “Penicillin-Streptomycin” line.
7. Click “Update” button (optional – displays updated cost).
8. Click “Proceed to Checkout” button.
10. Click “Assign Cart” button.

4.1.1 Remove Items from Cart

Objective: To remove an unneeded line in your cart.

Key Points:
- Remove as many lines as necessary.
- After a line is removed, it cannot be restored. You can select other items to add to the cart by clicking ‘Add Products.’
- Removing all lines will result in an empty cart but the cart remains active.
- Note that the entire cart can be deleted where all lines are removed and the cart itself is deleted. This is covered in the ‘Delete Cart’ module.

Scenario: Remove a line from your cart.
1. Click “Cart” icon on Top Menu Bar.
2. Click check box on the right side
3. From the drop down menu “Perform an action on”, select “Remove Selected Items”
4. Click “Proceed to Checkout” step to continue requisition process.

4.1.2 Change Product Quantity

Objective: To change the quantity of a product ordered after it is in your current cart.

Key Points:
- Purchase Flow icons at the top of the screen depict full requisition process moving from “General” to “Place Order”.
- Hosted catalog items are changed directly through your Cart. However, External Catalog (punch-out) items are updated by returning to the supplier’s site.

Scenario: Change an order
1. Click “Active Cart” (review the summary screen).
2. Enter “10” in Quantity (changing from 5 to 10) for “Applikator Reflotron”.
3. Click “Update” (quantity and amount in active cart updated).

4.1.3 Change Address

Objective: To override your default ship-to address with a new address for all lines in your requisition.
Key Points:

- If your ship-to profile is current and complete, this is normally all that is needed to change a ship-to address.
- Deliver-to department, building, room, attention and contact phone can be changed on your requisition if needed. For example, you may place an order for delivery to a different person in a different location.
- Changes can be made to all lines or only on individual lines by using the “Edit” button on the line.
- Use View/Edit by line item to change the Ship To for individual lines.

Scenario: Change address in your requisition on all lines to a new address.

1. Click “Cart” icon in Top Menu Bar to open your active cart.
2. Click “Proceed to Checkout” button.
3. Click “Shipping” step in process flow.
4. Click “Edit” button next to “Ship To”.
5. Click “to choose a different address, click here”.
6. Type Street name in Nickname / Address Text Search box and click “Search”.
7. Click “select” to the right of the desired address.
8. Enter Dept. and Rm:
9. If you would like address saved for future use click the check box by “Save this address for future use”.
10. Click “Save” button.

4.1.4 Change Project-Year, Entity, Unit, Reporting, Account, (Tag 1, Tag 2 – UMS users only)

Objective: When reviewing details of a requisition you are creating, you can override your default Accounting Codes for any of the lines in your requisition.

Key Points:

- Changes can be made to all lines or to individual lines.
- There is a note beneath each line item that indicates whether the charging instructions are the same or differ from the purchase requisition header’s charging instructions.

Scenario: Change default Account Code on all lines of a requisition.*

1. Click on “Cart” icon to open an active cart.
2. Click “Proceed to Checkout” button.
3. Click on “Accounting Codes” tab.
4. Click “Edit” button in Accounting Codes area.
5. Beneath the Project-Year, Entity, Unit, Reporting, Account, (Tag 1, Tag 2 – UMS users only) field, click on “Select from all values” to locate a project not already in your profile.
6. Type a value or description and click “Search”.
7. Click “select” by desired value.
8. Click “Save” button.
*To edit account codes for an individual line, begin by clicking on "Edit" on the line item in the Product Description area. Continue with Step 5 above.

### 4.1.5 Split Accounting Codes

**Objective:** To allocate the costs of an item(s) between two or more accounts.

**Key Points:**
- Confirm the split when you return to Review Details.

**Scenario:** Split the charge of a purchase by applying 25% of the purchase to one account and 75% to another account for all line items on a requisition

1. Click "Cart" icon on Top Menu Bar to open your active cart.
2. Click “Proceed to Checkout” button.
3. Click “Accounting Codes” tab.
4. Click “Edit” button in “Accounting Codes” area.
5. Click “add split” link at the far right (you may have to scroll to see it).
6. Select “% of Qty” or “% of Price” split option from drop-down menu.
7. Click “Select from profile values” or “Select all values” link to select accounting codes by Project-Year.
8. Enter account number value or description and click “Search”.
9. Click “Select” next to desired “Project-Year”. The remaining fields will self-populate.
10. Enter “25” in split amount field.
11. Repeat search for next accounting code.
12. Enter “75” in split amount field.
13. Click “Save” button.
14. Confirm that the changes are applied as desired by reviewing the accounting codes on the line items below.

### 4.1.6 Add Internal Notes

**Objective:** To attach internal notes, documents, link to documents and provide URL links from your desktop to provide additional information to an approver.

**Key Points:**
- You can attach internal notes, documents, link to documents and provide URL links from your desktop. For example, use this feature to attach Single/Sole Source Justification or competitive quotes for MUSC record retention purposes. Also, use to send notes to your Approver stating the business purpose of your order, etc.
- Internal Notes are not sent to the supplier. If you intend to send notes or attachments to the supplier, use the External Notes and Attachments area at either the line or header level.

**Scenario:** Add an internal note saying “special request for Dr. Smith”. Notes are added once a Cart is created.

1. Click on “Active Cart” on Top Menu Bar.
2. Click “Proceed to Checkout” button.
3. In “Internal Notes and Attachments” area, click “Edit” and type “Special request for Dr. Smith” in “Internal Note” section.
4. Click “Save” button.
5. Attachments may be added by clicking on “Add Attachment”, browse, select attachment and “Save”.

4.1.7 Add Notes to Supplier (External Notes)

Objective: To attach notes to provide additional information to the supplier.

Key Points:
- You can attach notes to supplier in the Notes to Supplier field in the “External Notes and Attachments” area viewable from the Review Address/Accounting Info step.
- If you do not want a note to be seen by the supplier, use an Internal Note, to limit access to MUSC employees only.

Scenario: Add a note saying “Customer Number 123456789.” Notes are added once a Cart is created.
1. Click on “Active Cart” on Top Menu Bar.
2. Click “Proceed to Checkout” button.
3. In the “External Notes and Attachments” area, click “Edit” button.
4. In “Note to All Suppliers” section, type “Customer Number 123456789”.
5. Click “Save” button.

4.2 Non-Catalog Orders

Objective: Use the Non-Catalog form to purchase an item that cannot be located in a catalog (either hosted or punch-out).

Key Points:
- With non-catalog purchases, always provide as much information as possible to explicitly describe your need to the supplier, including accurate pricing and product numbers.
- Attach quotes when available and include the quote number in the description.
- Required fields are in bold.
- Note: Non-catalog requests $250 or less will go straight to the supplier after all departmental approvals are completed. They will not stop in Purchasing for approval.

Scenario: In this scenario, purchase moving services for $210 from Dale J. Cook Moving.
1. Click “Shop” icon on left side. Click Shopping link and select “View Forms” under “Go To” section.
2. Select “Non-Catalog” in forms list.
3. Click “Supplier Search” link in Supplier Info dialog box.
4. In “Enter Supplier” field, type “Dale”. Dale J. Cook Moving and Storage Inc. populates. Click the box and Dale J Cook Moving and Storage Inc. is entered as the Supplier.
5. Enter “Product Description and Pricing” (example, move Dr. Brown’s office)
6. Enter “1 EA-Each” as Unit of Measure
6. Enter quantity – “1”.
7. Enter pricing - “210”.
8. Select “Add and go to Cart” from the “Available Actions” drop down menu at the top. NOTE: Use “Add to Cart and Return” if you plan to order another line item from the same supplier, or “Add to Cart” to add this item to cart and leave all field filled in to allow for easily adding another similar item (i.e. good for adding multiple items with slightly different part numbers or descriptions).
11. Click “Go” button.
12. Continue through steps to process requisition.

5 APPROVING ORDERS

5.1 Approve a Requisition

Objective: To review and approve requisitions that others submit to you verifying the accounting codes and the shipping address.

Key Points:
- As you review a requisition, you may not edit any data that requires correction, such as accounting codes or shipping information.
- You can approve one or more line items and reject others as necessary. Always assign the requisition to yourself before reviewing.

Scenario: Review and determine that no changes are needed to a requisition that is pending your approval. Approve the requisition.
1. Click Orders & Documents icon on slide-out menu on left. Click “Approvals” link, then click “My Approvals”.
2. In list of requisitions pending your review and approval, click the “Requisition Number” you want to approve.
3. Review the items, ship to address, Accounting Codes, Internal and External Notes, etc. – “Edit” as necessary.
4. Select “Approve/Complete Step” in the “Available Actions” drop-down menu, to the right.
5. Click “Go” – approval step complete.

5.2 Reject a Requisition

Objective: To reject requisitions that others submit to you that you deem not appropriate.

Key Points:
- As you review a requisition, you may not edit any data that requires correction, such as accounting codes or shipping information. The requisition should be returned to the requestor with a note as to the correction needed. You can reject any or all lines on the requisition. Lines that you don’t reject will be approved and included on a purchase order that will be transmitted to the supplier.
- If there are different reasons for rejecting items, you can reject lines in different groups and enter different reasons for rejection
• You can un-reject lines that you have previously rejected prior to selecting “Approve/Complete Step”.
• Departments may want to adopt conventions for rejection reasons.

Scenario: Review and reject a requisition that is pending your approval.

1. Click Orders & Documents icon on slide-out menu on left. Click “Approvals” link, then click “My Approvals”.
2. In list of requisitions pending your review and approval, click the “Requisition Number” you wish to review.
3. Click “Summary” tab.
4. Click check-box on line items to be rejected.
5. Select “Reject Selected Items” in the action drop-down menu.
6. Click “Go”.
8. Type in your reason for rejecting the item(s).
9. Click “Reject Line Items” button.
10. Click “Go”.
12. Click Go” – approval step complete.

5.3 Change a Requisition

Objective: Approvers should not edit requisitions that others submit to you but instead, return the requisition to the requestor noting what needs to be changed.

Key Points:
• You can reject any or all lines on a submitted requisition.
• Lines that you don’t reject will be approved and included on a purchase order that will be transmitted to the supplier.

Scenario: Review a requisition that is pending your approval.

1. Click Orders & Documents icon on slide-out menu on left. Click “Approvals” link, then click “My Approvals”.
2. Click on the requisition number. From drop down box, select “Assign to Myself”.
3. Review the requisition.
4. If you find items that need correction, go to the “Available Actions” drop down and choose “Return to Requestor”. In the box, note reason for return and detailing what changes need to be made and click “Return to Requestor”.

5.4 Forward a Requisition

Objective: To forward a requisition on to another individual for their review and/or approval or rejection.
Key Points:

- Approvers can approve one or more of the line items remaining and reject others as needed.

Scenario: Forward a requisition that is pending your approval to another individual.

1. Click Orders & Documents icon on slide-out menu on left. Click “Approvals” link, then click “My Approvals”.
2. In list of requisitions pending your review and approval, click the “Requisition Number”.
3. Click “Summary” tab.
5. Select “Forward to” in the “Available Actions” drop-down menu (upper right) (note that when you forward any rejected items will be permanently removed and cannot be “un-rejected” by you or the person the requisition is being forwarded to).
6. Click “Go”.
7. Enter the first two letters of the person’s last name that you are forwarding to in “Last Name”.
8. Click “Search”.
9. Click radio button next to person desired.
10. Click “Choose Selected User” button.
11. Type in an explanation message for the person to whom you are forwarding requisition.
12. Click “Forward” button.

5.5 Assign a Substitute Approver for Planned Absence

Objective: To temporarily delegate your requisition approval responsibilities to another individual.

Key Points:

- Requisitions requiring approval after assigning your substitute will go directly to your substitute’s folder instead of yours.

Scenario: Assign your approval privileges to a designee to approve requisitions in your absence.

1. Click Orders & Documents icon on slide-out menu on left. Click “Approvals” link, then click “Assign Substitute Approvers”.
2. Click on “Assign” under Action column.
3. Enter “Substitute Name” and click “Assign” button to locate the individual you wish to approve on your behalf.

Note: To end substitution, click on “End Substitute” when you return. You can assign a substitute to all folders or just to one folder under My PR Approvals.
6 TRACKING ORDERS

6.1 Find an Order

**Objective:** To find a previously created requisition or purchase order by a number of criteria. Depending on permissions granted by your business officer, you may view requisitions you created, those created by others in your department, or others throughout the University.

**Key Points:**
- You can search across requisitions or only orders that have reached purchase order status.
- You can search by requisition name, requisition number, supplier name or catalog SKU number.
- You can search within any date range.
- You can search by requisitioner (requestor), shopper, approver, or department entering the requisition.
- You can search by account code, department, project, or fund.
- You can screen by organizations within your department where applicable.
- You can screen by requisition status criteria such as “completed”, pending” etc.

**Scenario:** Locate a requisition by date.

1. Click “**Document Search**” tab on home page.
2. Select “Advanced Search”.
3. From the drop down box, choose “Requisition”.
4. You can filter by any of the criteria below
5. Click “**Date**” drop down box.
6. Check all requisitions done in the last month by selecting “Last Month” from the drop down box.
7. Click “**Go**” button.
8. Click on “**Requisition Number**”.
9. View the summary, detail, approval status or history and add notes to history, if needed,

Note, using the searches available on the “**Document Search**” tab, users are able to search by endless combinations of search criteria for All Documents, Requisitions, Purchase Orders, Receipts or Invoices. **Become familiar with the various criteria selections and filter down until you have the report you need.**
6.2 Withdraw a Line

Objective: To withdraw a requisition line that was submitted in error.

Key Points:

- Once an item is withdrawn, it cannot be reinstated.
- Withdrawing a line does not delete the requisition.
- You cannot withdraw a requisition line after it’s been approved and becomes part of a purchase order. If you recognize an error after it’s been sent to the vendor, contact the vendor to cancel the line. Also, submit a Change Order form in The MUSC Marketplace so the order can be cancelled in both The Marketplace and SmartStream. (See ‘Change Order’ form.)
- See the drop-down menu in the upper right hand corner – you can add notes to the history of the requisition if needed.

Scenario: To withdraw one or more items on a requisition previously submitted for approval.

1. Click “Document Search” on home page. Search for the Requisition by number or date range.
2. Click on “Requisition Number” (Requisition Summary appears.).
3. Select one or more items to withdraw by clicking checkbox beside the price of item.
4. Select “Withdraw Selected Items” in the action drop-down menu (above line items).
5. Click “Go” button to withdraw the item.
6. The message appears that once a line is withdrawn it cannot be reinstated.
7. Click “OK”.
8. “Withdraw” message box appears.
9. Type in your reason for withdrawing the item.

6.3 Withdraw a Requisition

Objective: To withdraw entire requisition from an approver when items ordered are no longer needed or your designated approver is out of the office.

Key Points:

- Once a requisition is withdrawn, it cannot be reinstated. However, once withdrawn, you can use the ‘Copy to Cart’ action and click Go. This creates a new cart containing all items and characteristics (e.g., quantity, charging instructions, etc.) of the previously withdrawn requisition. You can then modify the requisition and resubmit it to the same or different approver.
- See the upper left-hand action drop-down menu – you can add notes to the history of this requisition if needed.
**Scenario:** Locate and withdraw a requisition that has been submitted to an approver.

1. Click “**Document Search**” on home page. Search by Requisition by Requisition Number or date.
2. Click “**Requisition Number**”.
3. Click “**PR Approvals**” tab to view the requisition’s current status in the approval workflow
4. Select “**Withdraw Entire Requisition**” in the “**Available Actions**” drop-down menu.
5. Click “**Go**” button to withdraw the requisition.
6. The message appears that once a requisition is withdrawn it cannot be reinstated.
7. Click “**OK**”.
8. “**Withdraw Entire Requisition Message**” box appears - type in your reason for withdrawing the requisition.
9. Click “**Withdraw Entire Requisition**” button.

**6.4. View Requisition Approvals and History**

**Objective:** To obtain order status/history information on your requisitions and their subsequent purchase orders.

**Key Points:**
- Viewing History will include modifications made by the approver to the original requisition.
- Use this feature to also determine history of Purchase Order.

**Scenario:** Locate a requisition and note its approval status.

1. Under **My Orders** click “**Requisition**” link on home page.
2. Click “**Requisition Number**”.
3. Click “**PR Approvals**” tab, “**Comments**”, as well as “**History**” (view action taken on order).

**6.5 Cancel an Order**

Call supplier directly to cancel your order, then

Submit a “**Change Order Request**” form to Purchasing via MUSC Marketplace:

1. Click “**Shop**” icon on left side. Click Shopping link and select “**View Forms**” under “**Go To**” section.
2. Open the “**Change Order**” form.
3. Follow detailed directions on the form for processing and submission and be sure to select “**Cancel PO**” from the “**Type of Change**” dropdown menu on the form.
4. Then, after submittal and approval of the form, the cancelation will be processed by Purchasing in both the Marketplace and SmartStream.
Note: If you do not utilize this form to cancel an order, the order will not be canceled in either the Marketplace or SmartStream and may result in budget failure issues at a later date.

6.6 Who to Contact

For help with MUSC Marketplace, please contact the MUSC Help Desk at 792-8956.

For more information regarding the MUSC Marketplace, please go to Purchasing’s webpage and click on the link to the MUSC Marketplace.