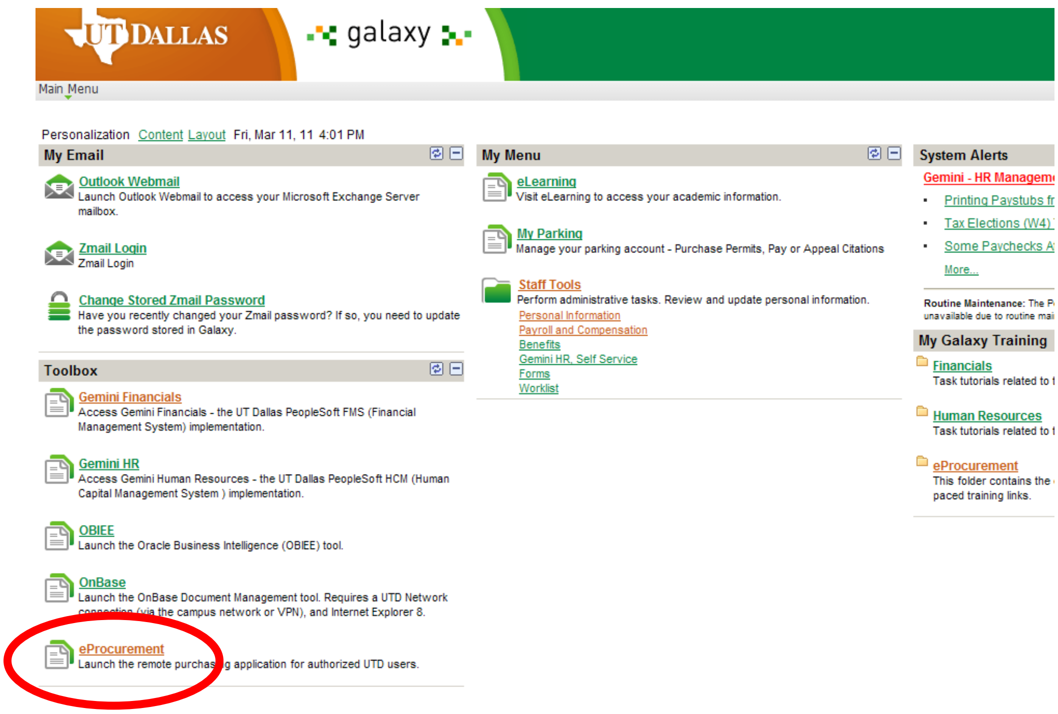
MSEN eProcurement Shopper Training – Revised 01/24/2017

- Our building “Room/Bldg” is “NSERL 3.746”
- Assign orders to “**Michele Brown**” – michele.brown@utdallas.edu
- Account codes to use:
    - 63007 (chemical stockroom)
    - 63302 (chemicals & gases)
    - 63001 (consumables)

Logging on to eProcurement:

- Click on “Galaxy”, found on UTD main website
- Enter in NetID and password
- Click on “eProcurement” located at the bottom-left of the screen

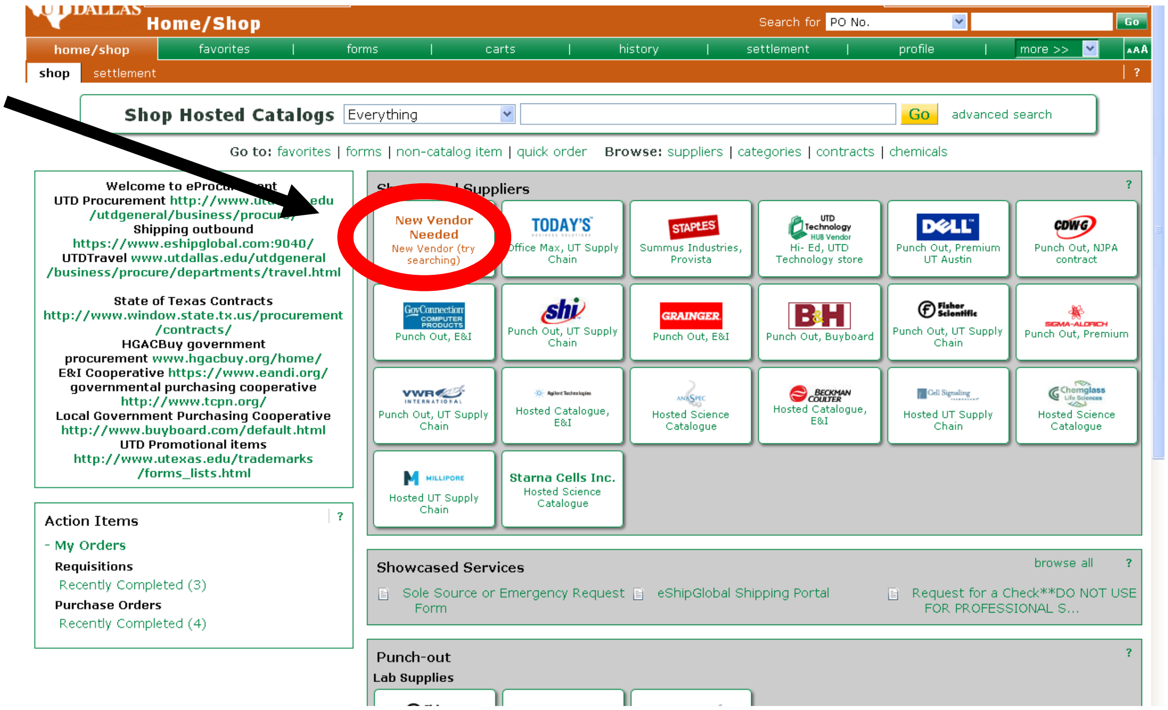


Selecting Address (*first time using eProcurement only*):

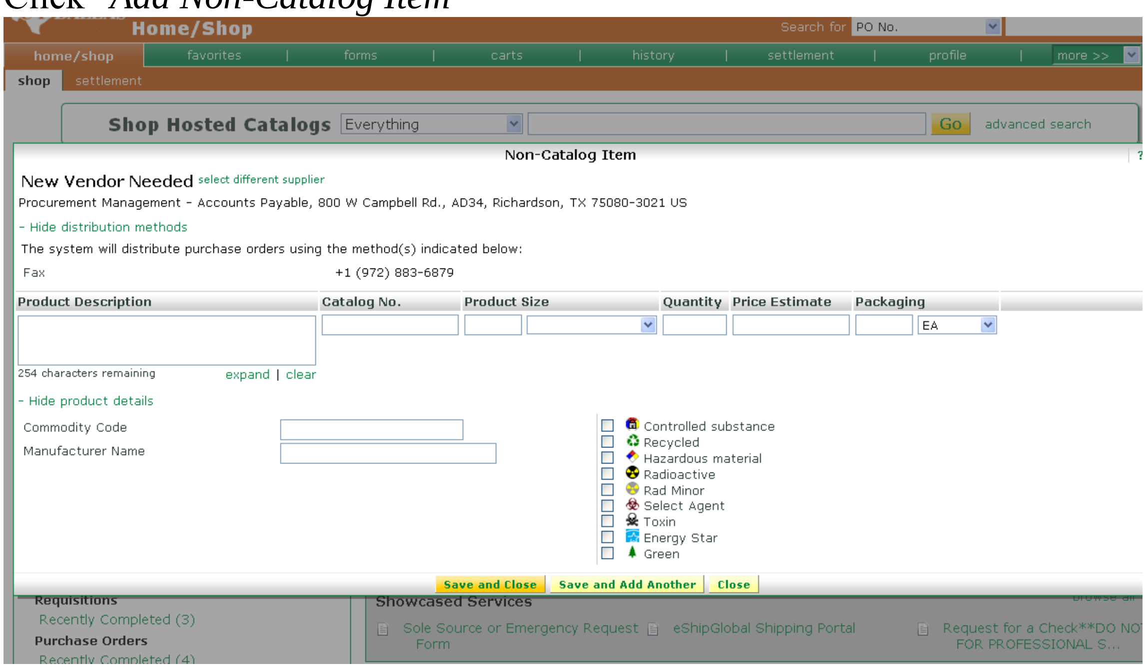
- Click “*Profile*” (top left of page beside your name)
    - Click “*Purchasing*”
    - Click “*Addresses*” (middle tab below Purchasing)
    - Click “*Select Addresses for Profile*”
    - Scroll down and select “*Service Building*”. Rename as “NSERL”
    - Click the box next to “Default”
    - Enter in your name
    - In the Rm/Bldg line, enter in “*NSERL 3.746*”
    - Click “*Save*”

Ordering using a Listed Vendor or New Unlisted Vendor:

- Search for the supplier under "*Browse: Supplier*":
  - If the supplier is listed, click on the supplier to select
  - If the supplier is not listed, then select "*New Vendor Needed*" on the main page

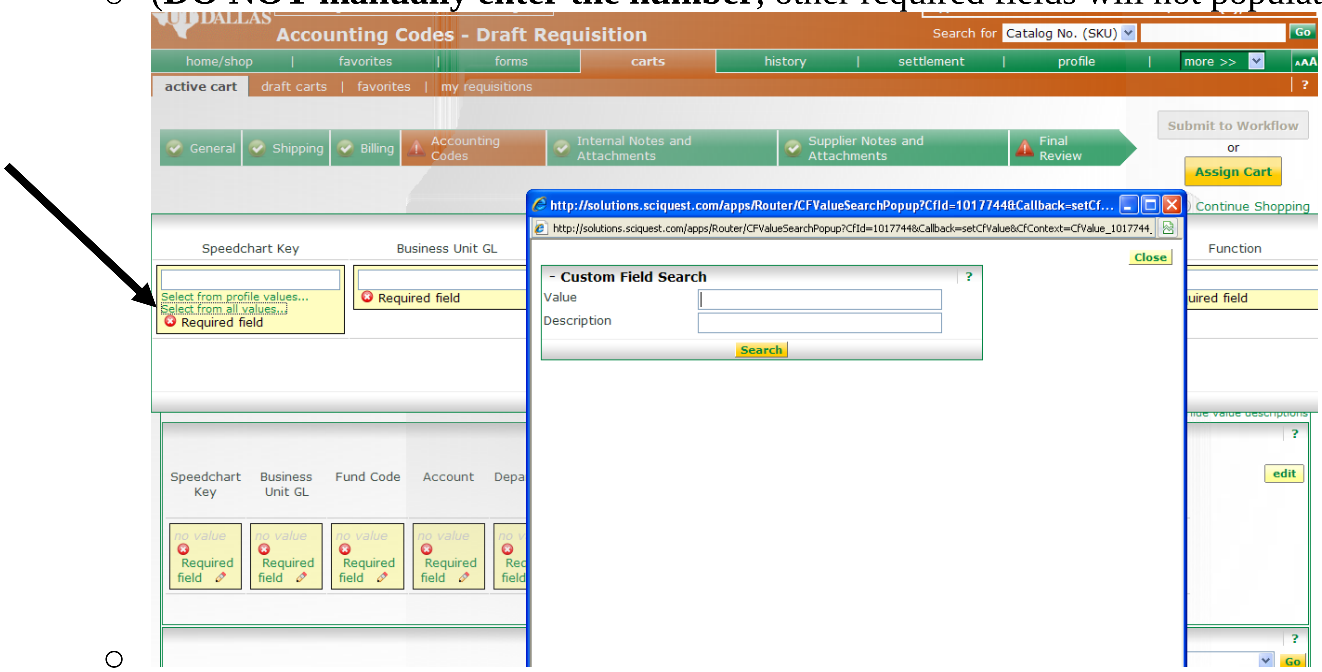


- Click "*Add Non-Catalog Item*"



- Enter information for the item
    - Provide item description
    - Provide catalog number (if available)
    - Quantity
    - Price (**Do Not enter $**. Enter only the dollar amount, not the symbol)
    - “Packaging” will be “1”
- Click “*Save and Close*” or “*Save and add another item*”
- Click on your cart, located on the top right corner of the main screen page
- If done ordering items, then click “*Proceed to Checkout*”
- **IMPORTANT when adding a new vendor !!!**: Click the tab called “*Comments*” and then “*Add Comment*”
    - Enter all the company’s information (Name, Address, Phone number, Fax number, Contact person, Email, and website)

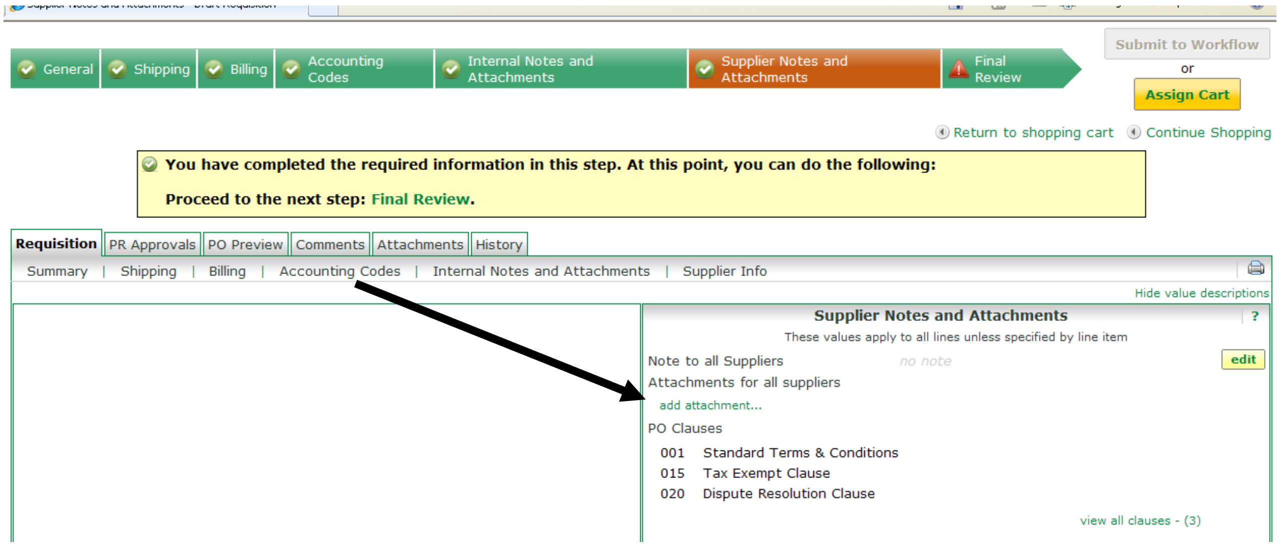
Adding a Cost Center:

- Click on the green link on the far left that says “*Speedchart key: Required field*”
- Click on the green link called “*Select from all values*”
    - (**DO NOT manually enter the number**, other required fields will not populate)
    - 

- Enter in the cost center number provided by your sponsor
    - Exception: If your sponsor wants you to use “*Startup*” funds, please enter that information under “*Comments*”
- Click “*search*”
- Click “*select*” (notice other funds will populate)
- In the “Account box”, enter in the account number (ex: 63001, 63007)
- Click “*Save*” (scroll over to the right to find the save button)

To Add a quote or other attachment:

- Click the tab that is called "***Supplier** Notes and Attachments*"



  - Click the link that says "*add attachment*"
  - Upload the Quote, drawings, dimensions, etc.
    - Note: Quotes are your friend, please request a quote from the company as much as possible. You must include a quote for any order of $1,000 or more.

- Click the tab that is called "*Internal Notes and Attachments*"
    - (Note: this step IS NOT required to order, however it will speed up the process)
  - Request the company's W-9 form and attach it by "*add attachment*"
  - *International businesses do not need to complete a W-9 form (only domestic companies)*

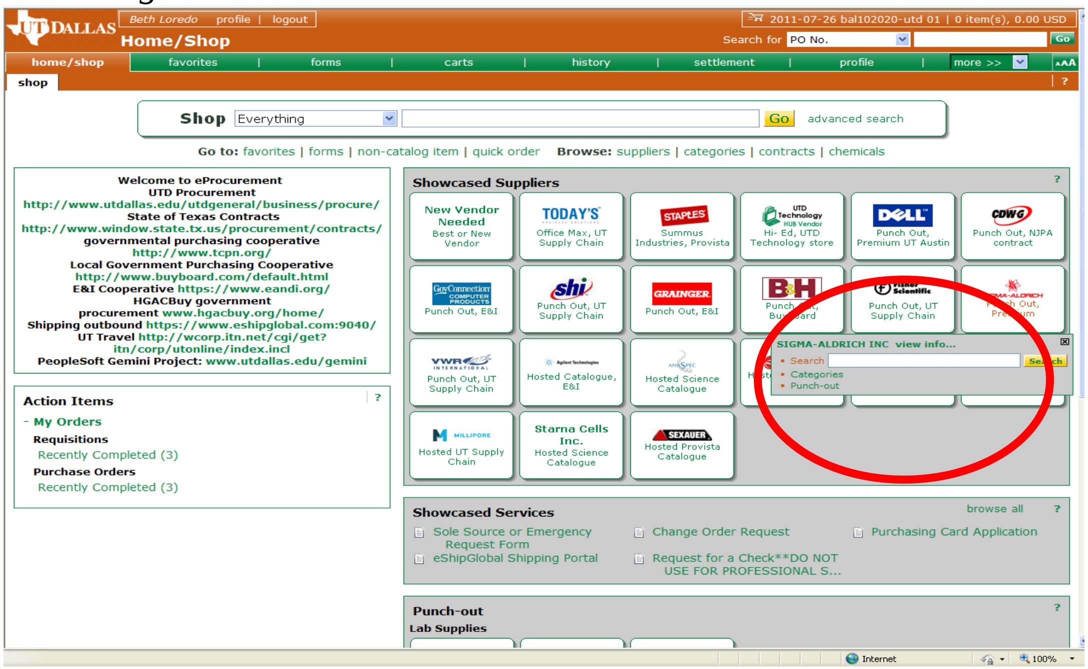
REMEMBER: For a new vendor - Do not send the order through without entering the Company information in the Comments

- Click "*Final Review*"
- Click "*Assign cart*"
  - Click "*search for an assignee*"
  - Enter in "Michele" "Brown", then "search"
  - Click select dot, then "*choose selected user*"
  - Click "*add to profile*" (this will save her as the default contact)
  - Enter in a note to Michele regarding the order
  - Click "*Assign*"
- The order has been submitted to the workflow

Ordering from a Punch-out Vendor (ex: Sigma Aldrich)

Punch-out vendors are listed on the first page of the website. Each punch-out vendor will have a "button" with their name. When you access one of the punch-out vendors, you will be taken to the vendor's webpage. You shop on the page, adding your items to the cart, and when you go to "check-out" you will be returned to the UT Dallas e-procurement site.

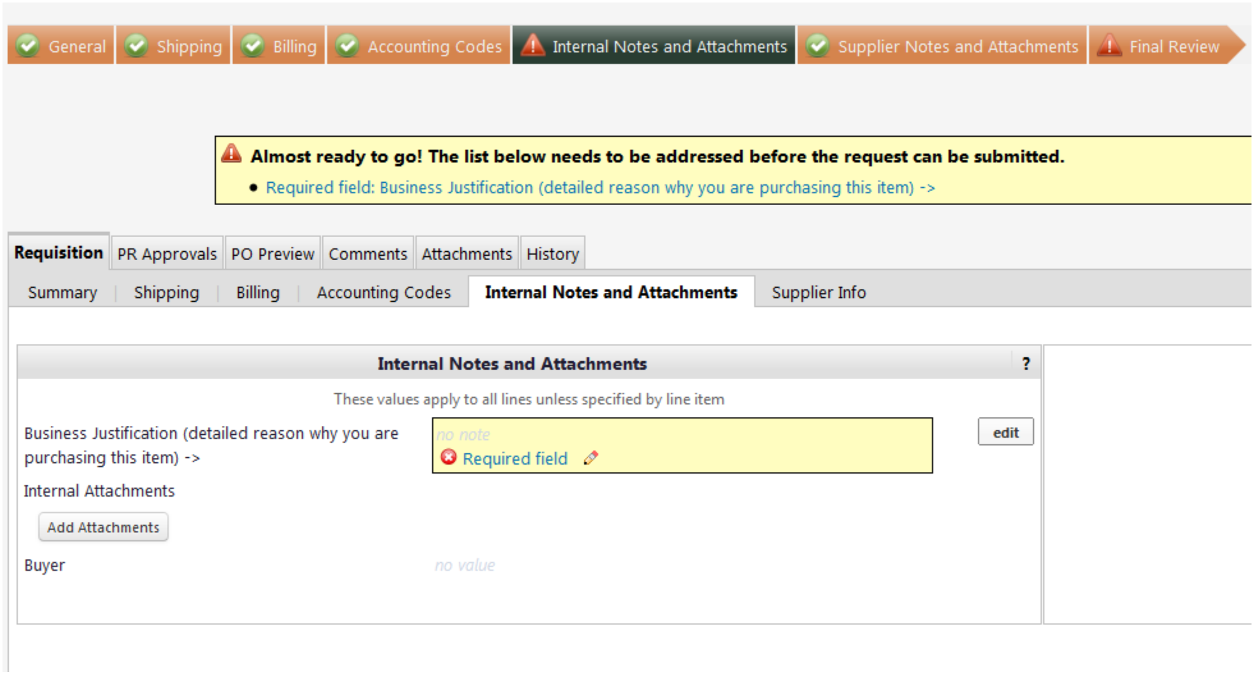
- Click "*Sigma-Aldrich Punch Out*"



- Order items, and submit order in the Sigma-Aldrich website
- This will return you to SciQuest. Then follow the instructions as mentioned earlier

Business Justification Field:

- This is a statement that shows the intent of the expenditures and how it relates to the funding source charged. The ordering department is required to provide the University with business justification for goods and services. *Example: Lab supplies for Dr. Doe's research in protein analysis*



To check the status of your orders:

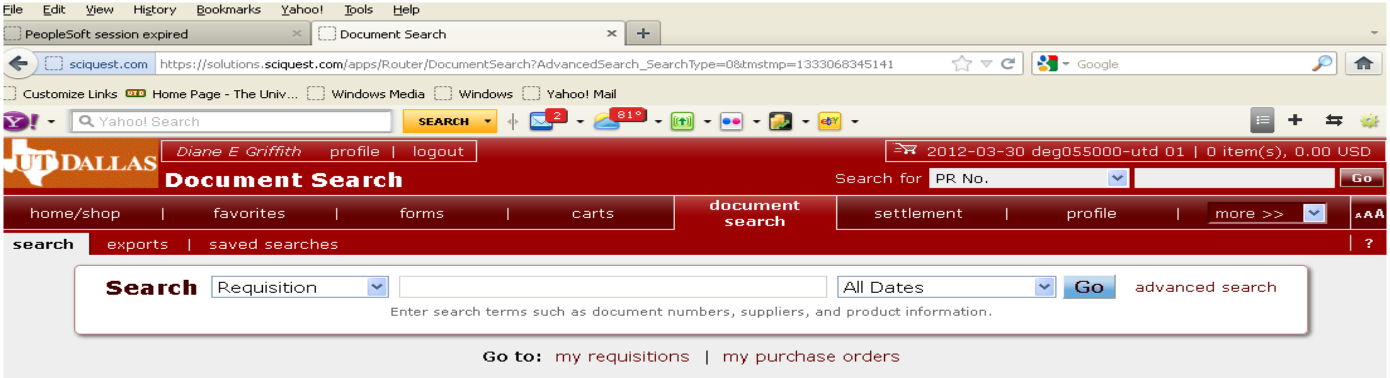
- If you have not assigned your order to Michele, it will be in your "active cart"
- If you have assigned your order to Michele, but it is not submitted, it will be in your "draft cart"

If you have assigned the order and it has been submitted, there are two ways to locate it:

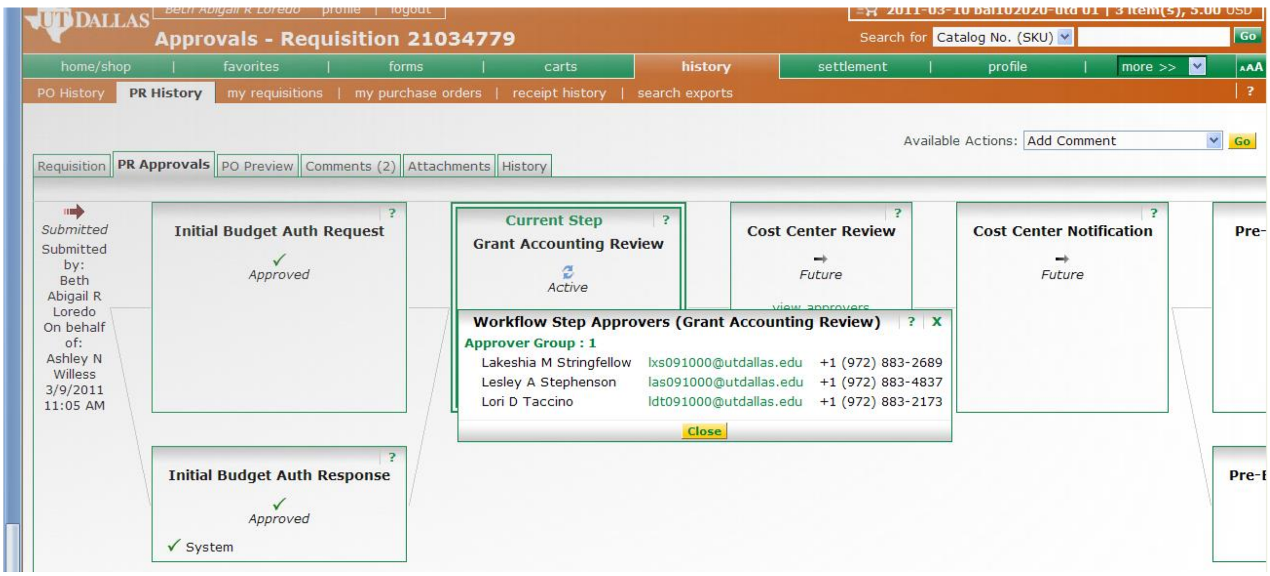
At the top right on the screen, there is a drop-down menu box entitled "Search for". The drop-down menu allows you to search using one of several criteria. Once you have entered the appropriate information click the "go" button. This will bring up a copy of your purchase requisition.

Alternatively, you can use the "Document search" tab. The "Document search" tab is located near the top of the screen in the middle.

Click the document search tab, this will bring you to a screen with a drop-down menu which allows you to search by requisition number, purchase order, invoice or receipt. Once you have entered your information Click the "Go" button. Click the appropriate Requisition number.



- To check the progress of your order:
  - Click the tab "*PR Approvals*"
  - Below is an example of workflow to see who is holding on to the order. To see



who to contact, click "view approvers"

Credit Card Orders:

If possible, all orders should be placed using the E-Procurement system. There are a few vendors that will not allow you to use a Purchase Order and in those cases we can use the department credit card to purchase items.

If you need to order from a vendor who does not take a Purchase Order you should:

- send me an email (msepurchasing@utdallas.edu).
- include the links to the items you wish to order. (If your vendor has a website)

- include contact information and a detailed description of the items to be ordered. (If there is no website)
- include the cost center that will be used to pay for the items

Note:

- Amazon orders will always be done using the department credit card. We have a department account with Amazon that is tax exempt.

Alternative method for purchasing with a credit card - You may also purchase items using your person credit card and be reimbursed.

If you use you own credit card:

- Use a tax exempt form – the university will not reimburse for sales tax.
- Keep all receipts
- See Michele Brown to request a reimbursement
- Please be sure to turn in the receipts ASAP. If the receipt is older than 60 days, the reimbursement will be taxed.

Miscellaneous tips:

1) Resubmitting any Order:

- Go into "*Document Search*" Type in the document number.
- Select the Requisition that you want to resubmit
- On the right side, under "Available Actions", select "*Copy to New Cart"*
- Everything will be copied to a new cart, except the cost center and account number
- **Important** – if your original cart was from a "punch-out" vendor, you will need to re-enter the items you wish to purchase – items from a punch-out vendor will ***not*** properly copy from one cart to another.

2) Renaming Carts:

- In the shopping cart, enter in the new name, click "*Update*"

3) If after a reasonable amount of time, an order you placed has not arrived, you may call the vendor (reference the PO number) to see if they have received and processed the order. If they have not received the order please let us know, so we can get in touch with Purchasing and have the order resent.

4) If you are unable to reach the MSEN admin staff, you can email
eProcurementHelpDesk@utdallas.edu
phone number 972-883-5231