

SmartCART Manual Created on 6/3/2010 11:37:00 AM

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SmartCART

SmartCART (Convenient Advanced Requisitioning Tool) is a software tool that consolidates the ordering of those things that you need to get your job done. How does it work? Think Amazon.com...one place where multiple vendors will list their products so your transaction and invoicing is automatic.

The SmartCART system went live on campus May 2010. The system has various vendors to purchase items. The Punchout Catalogs are those that go directly to the company website and allow a user to purchase items online and then pull that information back into the SmartCART system and and ultimately create a requisition in the Financials system. The Hosted Catalogs are vendors that have catalogs, similar to a paper catalog, that you can search across and are specific to CWRU.

The SmartCART system also has a Window Shopper feature. This allows users who do not have access to Financials to create a cart and then assign that cart to their approver to create the requisition and buy the product(s). Window Shoppers can be set up by filling out the form on the eProcurement and Distribution website and completing training to gain access to the system.

Ultimately, the SmartCART system will have 40 vendors.

In addition, items ordered through SmartCART will not require a buyers approval. Therefore, expediting the approval and Purchase Order process. The workflow is based on the existing workflow that has been set up for your department.

For more information, please see the Procurement and Distribution website at http:///campusservices.case.edu/PDSHome.aspx



Using the SmartCART system

This section reviews the SmartCART screen(s) and the various options that are available to shop in the SmartCART system.

Procedure

To navigate to SmartCART, login to PeopleSoft Financials.



Step	Action
1.	Click the eProcurement link.
2.	Click the Create Requisition link. Create Requisition
3.	The Create Requisition screen appears. Click the 2. Add Items and Services link. 2. Add Items and Services



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		Review and Submit							
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Step	Action
4.	Click the SmartCART tab. SmartCART

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- <u>Receive Items</u> - <u>My Profile</u>	1. Define Requisition 2. Add Items and Services	4 5	3. Review	w and Submit	
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Commitment Control General Ledger	Favorites Templates SmartCART Special Request				
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Please add new line in order to					
save this requisition.	Review and Submit				
Total Lines: 0 Total Amount (USD): 0					
	€ [- F
Done	✓ Trusted site:	s Prote	cted Mode: Or	n 🔍 1	00% 👻



Step	Action
5.	Click the SmartCART link.
	SmartCART

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Menu 🗖		
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- Procurement Matrix	COm' G Home/Shop	Search for Catalog No. (SKU) 👻 🔽 😡
- Create Requisition	home/shop favorites forms car	ts history settlement profile 😣
- Receive Items	shop settlement	?
D Services Procurement	Eventhing	
Commitment Control	Shop	Go advanced search
D General Ledger		
Requisition Summary	Go to: favorites quick order	Browse: suppliers categories
There are no lines on this request.	Action Items ?	Showcased Suppliers ?
Please add new line in order to save this requisition	- My Orders	
	Carts - Recently Completed (5)	BIOTAD RD 😁 BD
Total Lines: 0 Total Amount (USD): 0		SYSTEMS'
	CASE WESTERN DESERVE	
	UNIVERSITY	Punch-out ?
	EST. 1826	Lab Supplies
	Welcome to the SmartCart!	
		Airgas @Fisher Sciontific IDT
		Office/Computer
		MBO/Facilities
		GRAINGER
Done		✓ Trusted sites Protected Mode: On € 100% -

Step	Action
6.	The SmartCART home page appears.

2	SmartCART is now within the PeopleSoft Financials system. The left Financials Menu stays in the left corner. You may minimize the menu by clicking the - button on the top right.
	The Requisition Summary is on the left side and will populate with the items that you purchase from SmartCART in the same way it does when a requisitint is created for a Special Item in Financials.

Step	Action
7.	The home/shop link will always bring you back to the Home page.



Step	Action
8.	The favorites item shows a view of those items that you have marked as favorites for the ease of frequent purchasing.



Step	Action
9.	The favorites area works similar to your file Explorer on your computer. Personal are those favorites that have been selected by the user. Shared are those that have been posted by Procurement to highlight items or vendors.
10.	The carts item will allow you view your active carts, draft carts, carts that are assigned to you by a window shopper, favorites you have selected, and your recent purchases.
11.	The history item, allows you to search by PO, Cart, purchase order, or invoice. These items are historical. Active and draft carts and purchases are not viewed here.
12.	The Showcased Suppliers box shows those suppliers that Procurement has chosen to highlight. They may be new vendors or vendors having specials for that month.
13.	Punch-out suppliers are listed by category, those listed are the most popular vendors in their category.
	More punchout suppliers may be available than are listed on the home page.
	Use the Browse: suppliers link to see all suppliers available in SmartCART.



Step	Action
14.	The Action Items box shows on the SmartCART home page when orders have been completed or carts that have been assigned to you.
	<u>Completed</u> orders are those that have been Placed and a requisition created in PeopleSoft Financials.
	<u>Assigned Carts</u> are those that have been Assigned to you for approval and purchase from a Window Shopper.
15.	The Welcome box will contain messages from Procurement for SmartCART users. Messages can include, but are not limited to, new vendor information, specials from a vendor, or notices to users.
16.	The Cart icon and information on the top right of the home page will contain information about the cart that is being created. Information includes, the name of the cart (default or custom), number of items and the total dollar amount purchased.
17.	The Search for area, will allow searching in hosted catalogs only. These catalogs are hosted within the system. Searching punchout catalogs is not available from the SmartCART system since these catalogs leave SmartCART and enter the vendor website.
18.	Another area for searching is the " <i>Shop at the Top</i> " option. This is for <u>hosted</u> <u>catalogs</u> only. Search by category using the drop down and selecting or search using the Everything category.
19.	To utilize searching for all options which includes partial searches of your keyword. Click the advanced search link.

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Menu 🗖							
eProcurement Buyer Center - Procurement Matrix - Create Requisition - Manage Requisitions - Receive Items	home/sh	Micole N Dyme profi Home/Shop op favorites ttlement	le forms c	Seard arts hi	h for Catalog No	Select Draft Cart 5. (SKU) 👻	or Add Item to Cart
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	¥	Case Wester	$\mathbf{N}_{\underline{T}} \mathbf{Y}_{\underline{T}} \mathbf{Y}_{\underline{T}} \mathbf{S}_{\underline{T}} \mathbf{S}$	Punch-out Lab Supplies			?
	Welc	Thank You For Com	Cart!	Airgas	Fisher Scientific	IDT	
				Office/Comput		Internet	€ 100% ·



Step	Action
20.	The advanced search options will open. The first time you search, change your preferences. Click the change preferences link on the bottom right of the search area.

CASE WESTERN RES	SERVE	
UNIVERSITY	For 1826	Home Worklist Add to Favorites Sign out
Menu 🗖		
	Amort Nicole N Dyme profile	🖙 Select Draft Cart or Add Item to Cart 🤷
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- Receive Items	shop settlement	?
Services Procurement		
Accounts Payable	Advanced Search Everything	simple search
General Ledger	Find Results That Have:	
	All of These Words	Supplier
Requisition Summary	Part Number (SKII)	danufacturer Name
There are no lines on this request.		
Please add new line in order to		
save this requisition.	Other Options	
		Exclude words
Total Lines: 0	Exact Phrase A	Any of These Words
Total Amount (USD).	Search	change preferences
		Change Search Preferences 2 X
	Go to: favorites quick order Always	s include similar terms for searches
	Hide /	Advanced Search on search results
	Action Items ?	
	- My Orders	Save Cancel
	Carts - Recently Completed (5)	
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	Thank You For Coming	III yas () scientific ID I
		🅡 🍚 Internet 🔍 100% 🔹

Step	Action
21.	A new box Change Search Preferences will open.
	Click the check box, Always include similar terms for searches option.
22.	Click the Save button.
23.	Note the Preferences Saved text in the bottom right of the Advanced Search box.
24.	To return to the " <i>Shop at the Top</i> " box, click simple search in the top right of the Advanced Search box.
25.	To see all vendors and suppliers in SmartCART, click the suppliers link next to Browse:.

Case Western Ri UNIVERSITY	SERVE			<u>Home</u> <u>Worklist</u> .	Add to Favorit	es Sign out
Menu Petrocurement Buyer Center Procurement Matrix Create Requisition	Micole N Dyme COTT Browse by	_{profile} Supplier		Search for Catalog No. (SKU) 👻	ies 1 item(s	;), 22.00 USD
Manage Requisitions Receive Items My Profile Services Procurement	home/shop favorites shop settlement	forms	carts	history settlement	pi	rofile 😞 🛛
Accounts Payable Commitment Control General Ledger	+ Click to expand Search for Showing 1 - 10 of 10 results	Supplier Filter	?		ь	ack to shop
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otal Lines: 0	BD Biosciences	<u> </u>	SCI CAT	Integrated DNA Technologies Inc.	0 -	
otal Amount (USD). 0	Bio-Rad Laboratories	Ŭ	ASCI CAT	R&D Systems, Inc.	Ŷ	CAT
	Dell	ې		Staples Advantage	0 -	
	Page Size 20 💌				↓ Page	1 🔻 of 1 👂
				✓ Trusted sites Protected Mode: On		₹ 100% -

Step	Action
26.	The list of vendors page opens. Punch-out Suppliers are indicated by the arrow through the bullseye icon.
27.	Hosted Catalog Suppliers are indicated by an open book icon.
28.	To return, click the back to shop link in the top right of the page.



Case Western Resi UNIVERSITY	ERVE Home Working Add to Favorites Sig	n out
Menu ■ ♥ eProcurement ▶ Buyer Center − Procurement Matrix − Create Requisition	Micole N Dyme profile Implify Implify Home/Shop Search for Catalog No. (SKU) Implify	
- Manage Requisitions - Receive Items - My Profile Services Procurement	home/shop favorites forms carts history settlement profile shop sattlement	2
 ▷ Accounts Payable ▷ Commitment Control ▷ General Ledger 	Shop Everything Go advanced search	
Requisition Summary	Go to: favorites quick order Browse: suppliers categories	
There are no lines on this request.	Action Items ? Showcased Suppliers ?	
Please add new line in order to save this requisition.	- My Orders Carts - Recently Completed (5)	
Total Lines: 0 Total Amount (USD): 0	SYSTEM5"	
	CASE WESTERN RESERVE UNIVERSITY EST. 1826 Punch-out Lab Supplies	
	Welcome to the SmartCart! Airgas Fishering Thank You For Coming IDT	
	Office/Computer	
	MRO/Facilities	
http://usertest.sciquest.com/apps/Router	/SupplierList7tmstmp=1270746964588	•

Step	Action
29.	To see items to purchase by category, click the categories link next to the Browse: .





Step	Action
30.	The Categories screen appears. Each category can be expanded and drilled down for more detail. For our example, click the Lab Supplies + button.
31.	The category, becomes finer by smaller categories. For our example, click the Cell Biology + button.
32.	To drill down further, click the Cell Biology Kits link.



Step	Action
33.	Note as you drill down, the view link and view (incl. sub-categories) link. In our example we will click an item that does not have sub categories by clicking the view link.



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here are no lines on this request.	Results for: Lab Supplies : Ce	ll Proliferation / Viability Assa	avs + Include similar terms	Showing 1 - 7 of 7 results
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	Assays	Manufacturer Info	556028 - (BD Biosciences)	1 Add to Cart 🔻
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	EA (7)	BrdU from BD Bioscien Part Number	ICES 556029	410.00 USD 100TEST, EA
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Step	Action
34.	The SmartCART home pages appears with items from the hosted catalogs that match the category(ies) that we chose. To return to the Home Page you can click home/shop .
35.	Users should now be familiar with the SmartCART Home page, links, and location of items. End of Procedure.



Viewing Vendors and new vendors

This section explains how to find and view vendors in the SmartCART system. Vendors will be added regularly to SmartCART throughout the year. There will be a maximum of 40 vendors in SmartCART by 2011.

New vendors will be advertised in The Daily email newsletter and on the Procurement and Distribution website at http://campusservices.case.edu/PDSHome.aspx

If you have vendors you would like to suggest for SmartCART please email smartcart@case.edu with the information about the vendor and details about how often purchases are made from that vendor.

Procedure

To begin, log into Financials.

Follow the steps to navigate to the SmartCART Home page.

Step	Action
1.	To access SmartCART follow the steps to Create a Requisition.
	Click the eProcurement link in the Menu.
	Click Create Requisition.
	Click 2. Add Items and Services
	Click SmartCART tab
	Click SmartCART link.
	▷ eProcurement



🏉 Create Requisition - Windows Inte	ernet Explorer	
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- Manage Requisitions	home/shop favorites forms ca	arts history settlement profile 🔇
- Receive Items - My Profile	shop settlement	?
	Everything	▼ advanced
Requisition Summary	Shop	Go search
There are no lines on this request.	Go to: favorites Louick orde	r Browse: suppliers Laterories
save this requisition.		
Total Lines: 0	Action Items ?	Showcased Suppliers ?
Total Amount (USD): 0	- My Orders	
	Carts - Recently Completed (5)	
	CASEWESTERN RESERVE	
	UNIVERSITY	Punch-out ?
	E31. 1020	Lab Supplies
	Welcome to the SmartCart!	
		AITYAS (C) Scientific ID1
Done		
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Step	Action
2.	The SmartCART Home page appears.
	Showcased Suppliers are those suppliers that Procurement has chosen to highlight. They may be new vendors or those having specials for that month. Showcased Suppliers
3.	Punch-out suppliers are listed by category, those listed are the most popular vendors in their category.
	More punchout suppliers may be available than are listed on the home page. Punch-out
4.	Click the suppliers link to see the full list of suppliers that are available in the SmartCART system. Browse: suppliers



🏉 Create Requisition - Windows Inte	ernet Explorer				
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- Create Requisition	home/shop favorites fo	orms	carts	history settlement	profile 🔕
- <u>Receive Items</u>	shop settlement				?
- <u>My Profile</u>					
Dequisition Summary	+ Click to expand Search for Supplier F	ilter	?		back to shop
There are no lines on this request.	Showing 1 - 10 of 10 results				
Please add new line in order to	Page Size 20 👻	Sort by: Be	est Match 👻	↓ Page	1 💌 of 1 🕨 legend ?
save mis requisition.	Supplier Name	Type Prefe	rence	Supplier Name	Type Preference
Total Lines: 0 Total Amount (USD) ¹ 0	Airgas Great Lakes	\$	Fisher	Scientific	♦
Total Allount (03D).	Apple Computer	0 -	Graing	er	♦
	BD Biosciences		Integra	ated DNA Technologies Inc.	♦
	Bio-Rad Laboratories	10 • 8	R&D Sy	/stems, Inc.	CAT CAT
	Dell	0 -	Staples	s Advantage	÷
	Page Size 20 👻				↓ Page 1 of 1
Done			8	✓ Trusted sites Protected Mode: Or	® 100% →
	Care Western Perer	aquisition			» 🗸 🗊 🗗 🥼 11,57 AM

Step	Action
5.	Punch-out Suppliers are indicated by an icon that looks like an arrow through a bullseye.
6.	Hosted Catalog Suppliers are indicated by a open book icon.
7.	New vendors will be posted here as well as on the Procurement and Distribution website at http://campusservices.case.edu/PDSHome.aspx They will also be announced in The Daily email newsletter. End of Procedure.



Ordering from a Hosted Catalog

Hosted Catalogs are catalogs from suppliers that are hosted for and at CWRU and are located within the SmartCART system. Using hosted catalogs allows a user to search across catalogs and vendors and compare items from all hosted catalogs.

Procedure

To begin an order from a Hosted Catalog, log into Financials to get started.



Step	Action
1.	Click the eProcurement link.
2.	Click the Create Requisition link.
	You may also follow the navigation on the left Menu to Create Requisition.
3.	The Create Requisition screen appears.
	Click the 2. Add Items and Services link. 2. Add Items and Services
4.	Click the SmartCART tab. SmartCART



Step	Action
5.	Click the SmartCART link.
	SmartCART

Case Western Res UNIVERSITY	NerVE No 1886 Home Worklist Add to Favorites Sign ou
	Micole N Dyme profile Image: Select Draft Cart or Add Item to Cart COINT Home/Shop Search for Catalog No. (SKU) ▼ Image: Select Draft Cart or Add Item to Cart
Create Requisition Manage Requisitions Receive Items My Profile	home/shop favorites forms carts history settlement profile \$ shop settlement ?
Services Procurement Accounts Payable Commitment Control General Ledger	Shop Everything • Go advanced search
Requisition Summary	Go to: favorites quick order Browse: suppliers categories
There are no lines on this request. Please add new line in order to save this requisition. Total Lines: 0 Total Amount (USD): 0	Action Items 7 - My Orders Carts - Recently Completed (5) CASE WESTERN RESERVE UNIVERSITY 1826 Punch-out 7 Hut complex I 7 Punch-out 7 I 7
	Welcome to the SmartCart!
	Office/Computer
	MRO/Facilities GRAINGER
Done	✓ Trusted sites Protected Mode: On ⊕ 100% -

Step	Action
6.	The SmartCart screen appears.
	To see all hosted catalogs, click the Browse: suppliers link.
	Browse: suppliers



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Step	Action
7.	Hosted Catalog Suppliers are indicated by the open book icon in the list of suppliers.
8.	Click a Hosted Catalog Suppliers icon.



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Commitment Control General Ledger	2250 Qume Dr ⁵² 1 Fax No.: +1 (408) 954-2007 San Jose, CA 95131 US
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Step	Action
9.	The top area shows information about the supplier. The bottom area shows the categories this vendor provides and drill down for more information and details.
10.	To return to the home/shop page, click the back to shop link.



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Step	Action							
11.	To search all hosted catalogs, use the " <i>Shop at the Top</i> " search area. For this example, search everything and enter " test tubes " in the keyword search field.							
	Note, see the "Using The SmartCART system" document to set up your search preferences.							
	Shop test tubes							
12.	Click the Go button.							



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Step	Action
13.	The Refine and Filter Search box on the left populates with filtered options from your search. For example by Supplier or By Category. It also lists the number of items in that category. Refine and Filter Search
14.	The compare link can be used only with hosted catalogs. Click compare on each item you would like to compare, a green check appears next to the word compare for those items that are to be compared.
15.	To change this preference, and not compare items, you can click the remove link.
16.	When ready to compare, click the Compare Selected: 2 button on the top right of the page. Compare Selected: 2



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Step	Action
17.	The items will appear in a side by side comparison. To choose any item to purchase, enter the quantity, if more than 1, and Click the Add to Cart button, the cart icon.
18.	Notice, on the top right of the home page, that your cart is now populated with that item. Click the cart icon link in the top right to go to your cart.
19.	To return to your original search click the << Back to Search Results button.



Case Western Re UNIVERSITY	SERVE		Home	<u>Worklist</u> <u>Add to Favorites</u> <u>Sign out</u>
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Step	Action
20.	Using the Filter Search, for our example, click the BD Biosciences (15) link.
	BD Biosciences (15)





Step	Action
21.	The 15 items that were listed appear in a list. Choose an item by entering the amount, if more than 1.
22.	Click the Add to Cart button.
23.	Notice that our cart, on the top left of the home page, has 2 items and increased in dollar amount.
24.	Click the cart icon link to return to your active cart. 2010-04-08 TRNA001 01 2 item(s), 1,869.50 USD

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Step	Action
25.	The cart that has been created appears. Name the cart by clicking in the Cart Name field. In our example, enter " Lab 2 Order ".
26.	When ready to buy the items. Click the Place Order link.
	There will be a moment when the information is integrating from SmartCART into Financials.



Case Western Reserve UNIVERSITY og #356	<u>Home</u>	<u>Worklist</u>	Add to Favorites	Sign out
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Step	Action
27.	The Create Requisition page appears. Continue creating the requisition as usual to finalize the purchases. Click the 3. Review and Submit link. <u>3. Review and Submit</u>



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eProcurement Procurement						Help 🔺
- Procurement Matrix						
- Create Requisition	Create Requi	sition				
- Receive Items	1. Define	Requisition	2. Add Items and Servic	es 3. Revie	w and Submit	
 Services Procurement Accounts Pavable 	Review the details of y	our requisition, make any neo	essary changes, and submit it for ap	proval.		
D Commitment Control	Business Unit:	CASE1 Case Western	Reserve Univ			
D General Ledger	Requester:	TRNA001	Nicole N Dyme	*Currency:	USD	
Requisition Summary	Requisition Name:			Priority:	Medium	~
Description Qty UOM	Requisition Lines					
CD3/CD4/CD45 with 2 EA Trucount	Line Descript	on	Vendor Name	Quantity UOM	Price	<u>Tota</u>
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mi	2 <u>Tubes.</u>	Conical,1.5 ml	Bio Rad Laboratories	1.0000 Each	79.50000	79.5
Total Lines: 2	Select All / Des	elect All		To	tal Amount	1 869 50 11
Total Amount (USD). 1,009.50	Add to Favor	tes 😡 Add to Template(s)		🗊 Delete		.,
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	Save & submit	Save & preview approvals	X Cancel requisition	Find more if	ems	
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Step	Action
28.	Click the paper dollar icon to expand the item line.

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 Create Requisition 		-							-				
 Manage Requisitions 	=	2 <u>Tubes</u>	Conical, 1.5 m	1		Bio Rad	Laborator	ies	1.0000	ach	79.5	0000	79.5
- Receive Items		Cor	solidate with d	other Reas		Over	ide Suaae	sted Vendo	or				
- My Profile			sonduce mart	viter nego			nue ougge	otea vena	~				_
Services Procurement		Shinning Lin	P. 1	Due Date:		B1	6	uantity	1 0000				
Accounts Payable		Shipping Lin	D.	Due Dute.				aunuty.	1.0000				
D Commitment Control		Status:	Active	*Ship To:	CEDA	RAP	K 🖃 M	odify Shipp	ing Address				
V General Ledger	×		Nicole N Dyn	ne									
		Attention:	raicole in Dyn										
Requisition Summary	1												
Description Oty UOM		*Distribute by	Amt 🔽										
CD3/CD4/CD45 with 2 EA		Accounting Lin	29					Cuolo	mine Fied V/r	A II 1 🔠	First 4	I D Loot	
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Tubes Conical 1.5 1 EA		Charmendar	Chartheidas				-		[
ml	.	Line Percent	Amount	Speed Type	Ac	count	Event	Fund	Dept	Project	Class		
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Total Lines: 2													
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Step	Action
29.	Note that the Requisition Summary , on the left, is populated with the 2 items we ordered from the hosted catalogs.
30.	If the Ship To: will be to a location that is not the default (your Case ID) click the lookup icon to search locations.

See the section *Ship To Locations* for details on using the new Ship To address.



Step	Action
31.	Enter the SpeedType in the SpeedType field. Speed Type OPR261221

Each line item will need to have a SpeedType entered. The advantage of this being per line is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will recieve their own Purchase Order from SmartCART.



Case Western Resi UNIVERSITY	ERVE
Menu ■ ♥ eProcurement ■ ▶ Buyer Center ■ ─ Procurement Matrix ■	Line Percent Amount Speed Type Account Event Fund Dept Project Class 1 100.0000 1.790.00 OPR261221 Q 531200 Q 97600 261221 10 Image: Class Image: C
Create Requisition Manage Requisitions Receive Items My Profile	□ 2 Tubes, Conical, 1.5 ml Bio Rad Laboratories 1,0000 Each 79,50000 79.5 □ Consolidate with other Reqs □ Override Suggested Vendor 10000 10000
Services Procurement Accounts Payable Commitment Control General Ledger	Shipping Line: 1 Due Date: Image: Constraint of the state of the s
Requisition Summary Description Qty UOM CD3/CD4/CD45 with 2 EA Trucount Tubes. Conical.1.5 1 EA	Distribute by: Amt Accounting Lines Customize Find View Ail # First I tort I. Last Chartfields Chartfields Chartfields Chartfields Construct I for the set I former
ml Total Lines: 2 Total Amount (USD): 1,869.50	Line Percent Amount Speed Type Faccount Event Project Class 1 100.0000 79.50 OPR261221 \$31200 Q Image: Class Image:
	L Add to Favorites Add to Template(s)
	Send to Vendor Show at Receipt Show at Voucher
	Save & submit & Save & preview approvals Cancel requisition Find more items

Step	Action
32.	Click the Save & submit button.

CASE WESTERN RES	SERVE		_	Here Merkek		L Circut
Menu eProcurement buyer Center - Procurement Matrix - Create Requisition - Manage Requisitions	Confirmation				<u>Aug to Pavornes</u>	<u>Help</u>
- <u>Receive Items</u> - <u>My Profile</u> Services Procurement D Accounts Payable Commitment Control D General Ledger ✓	Requested For: Requisition Name: Requisition ID:	Nicole N Dyme 1000099296 1000099296	Number of Lines: Total Amount:	2 1,869.50 USD		
Requisition Summary Description Cty UOM CD3/CD4/CD45 with 2 EA Trucount Tubes, Conical, 1.5 1 EA	Business Unit: Priority: Budget Status: Stage: 1	CASE1 Medium Not Checked				
Total Lines: 2 Total Amount (USD); 1,869.50	✓ Requisiti Amount and Ca Pending ✓ Ken Fusio ✓ <\$5000 Apr	egory Approval egory Approval rover Edit Requisition danage Requisitions Cre	Apply Approval Changes C	check Budget		
Done				🧊 🌍 Internet	e.	100% -



Step	Action
33.	If you need approvals the Approvals page will appear. If you are a self approver the page will show approved. A Purchase Order will be dispatched. The process runs about every 20 minutes to dispatch SmartCART Purchase Orders. Once the approver has approved the purchase a Purchase Order will go out within 20 minutes. No buyer is involved in SmartCART purchases.
34.	This completes how to place an order in SmartCART from a Hosted Catalog. End of Procedure.



Ordering from Dell in SmartCART

This section will explain how to order from Dell using SmartCART.

Ordering from Dell in SmartCART is very similar to the previous method. Using SmartCART, an equote is not needed, the system will connect to your SmartCART that will have the system configuration and information available, even after the purchase.

Procedure

To begin, login to Financials and enter the SmartCART home page.

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SCM Integrations						
> Set Up Financials/Supply Chain						
> Tree Manager						
> Reporting Tools						
- My Personalizations						
- My System Profile						
• <u>My Dictionary</u>						
		🗸 Trust	ed sites Prot	ected Mode: (Dn	10

Step	Action
1.	Click the eProcurement link.
2.	Click the Create Requisition link.
	You may also follow the navigation on the left Menu to Create Requisition.
3.	The Create Requisition screen appears.
	Click the 2. Add Items and Services link. <u>2. Add Items and Services</u>
4.	Click the SmartCART tab. SmartCART



Step	Action
5.	Click the SmartCART link.

Case Western Res UNIVERSITY	ERVE				<u>Home</u>	Worklist 4	Add to Favorites	Sign out
Menu	Amost							
▷ Buyer Center		Nicole N Dyme profile			=11	Select Draft Ca	rt or Add Item to	Cart
- Procurement Matrix		Home/Shop		Search ·	for Catalog No.	. (SKU) 🔻		Go
- Manage Requisitions	home/shop							۲
- Receive Items - My Profile	shop settleme	nt						2
Services Procurement		6	con this a					
D Accounts Payable D Commitment Control	Shop		veryching	•	_	Go adv	ranced arch	
D General Ledger		I						
Requisition Summary		Go to: favo	rites quick order	Browse: supplie	ers categories			
There are no lines on this request.	Action Items		?	Showcased S	unnliers			?
Please add new line in order to	- My Orders							
save this requisition.	Carts - Recen	ly Completed (5)			DD			-
Total Lines: 0		,,,		BIORAD	SYSTEMS*	😔 BD		=
Total Amount (USD): 0								
		OF WEGTERNYD	TOTIN		(
	CA	SE WESTERN R	ESERVE					2
		IVERSITY	est. 1826	Punch-out				
				Cab Supplies) <u> </u>		
	Welcome	to the SmartCart	!			TOT		
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				Office/Compute	, ,	· (
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-				GRAUNGER			0	•
Done				🗸 Trus	ted sites Protect	ted Mode: On	الله 🔍 🔍	J% 🔻 💡

Step	Action
6.	The SmartCart Home page appears.
	Click the Dell logo box . Dell is a Punchout supplier.

The Showcased Suppliers section will have links to suppliers that Procurement wants to highlight such as new suppliers to the system or those that are having specials.
 Punch Out suppliers are those that have catalogs you will order from directly.
 Hosted catalogs are those that have catalogs that the University hosts that you can purchase from.

Step	Action
7.	Since Dell is a punch out catalog, the system will go directly to the Premier website.





Step	Action
8.	The Premier website appears. After you have selected and customized the item you want to purchase, click the Add to Cart button.
9.	Choose the correct option for Trade Compliance. In our example, click the I WILL NOT export this order outside the United States. option.



Case Western Res UNIVERSITY	ERVE	worites Sign out
Menu ■ ♥ eProcurement ▶ ▶ Buyer Center ▲ − Procurement Matrix ▲	SelectSite Punchout	ncel Punch-out
Create Requisition Manage Requisitions Receive Items My Profile	Systems v Standard Configurations v Software & Perip	herals v
Services Procurement Accounts Payable Commitment Control General Ledger	Windows [®] . Life w Shopping Guarantee	rithout Walls™ . [
Requisition Summary There are no lines on this request. Please add new line in order to easy this requisition	SHIPPING PAYMENT VERIFY & SUBMIT ORDER REQUISITION * Indicates Required Fields	
Total Lines: 0 Total Amount (USD); 0	Shipping & Handling Method	E
	 No Charge - Lowest Cost 3-5 Day Delivery 2nd Business Day Delivery - Fast Delivery, Your order will be delivered up to 2 business days after it ships. Next Business Day Delivery - Fastest Delivery, Your order will be delivered on the net business day after it ships. 	
	Trade Compliance IVILL NOT export this order outside the United States. IVILL export this order outside the United States. IVILL export fairy product and software purchased from Del must be made in accordance with all relevant laws of the United States, including and without imitation, the U.S. Export Administration Regulations. This may require that you obtain a formal export license or	
Dene		+ +

Step	Action
10.	Click the Continue button.




Step	Action
11.	Once you have reviewed your order for accuracy, click the Submit Order Requisition button.
	Printing your Order Summary and Order Details is also available from this page. Submit Order Requisition

Case Western Res	ERVE				<u>Home</u>	<u>Worklist</u> <u>Add to</u>	<u>Favorites</u> <u>Sign out</u>
Menu	the state	· · · · · · · · · · · · · · · · · · ·					
▷ Buver Center	Amari	Nicole N Dyme profile			2010-03	25 TRNA001 01 1	item(s), 979.80 USD
- Procurement Matrix	СОЩ.С	Cart - Draft Requisitio	n	Sea	rch for Catalog	No. (SKU) 👻	Go
- Create Requisition	home/shop	favorites form	s carts	Ь	istory	settlement	profile 🔕
- Receive Items	active cart draf	t carts favorites my recen	requisitions				?
▷ Services Procurement	Create Cart		Add	Products	Edit Cart -> P	lace Order or Assi	on Cart to Approver
Accounts Payable							
Commitment Control			Save				
V General Ledger	Cart Name	2010-02-25 TRN0001-01					
	Deserved for	Nicela N Durne					
Requisition Summary	Prepared for	Select a different user					
There are no lines on this request.	Prepared by	Nicole N Dyme					
Please add new line in order to			Supplier / Line It	em Details			?
save this requisition.	Show line details			For selected I	ine items Add 1	To Favorites	▼ Go
Total Lines: 0	Dell more info						
Total Amount (USD): 0	The items were re Click this messag	e for more details.	site, therefore your al	bility to edit o	r view the items	in this application r	nay be limited.
	Dundust Dos	selection		Catalog No.	Size /	Unit Quantity	Ext Duico
	Produce Des	cription		catalog No	Packaging	Price	EXG PHCe
	Power Supply	60 MT;OptiPlex 960 Minitower Bas γ ∲- more info	e 90 Percent Efficient	224-8146	EA	979.80 1 EA	979.80 USD
						Supplier subtotal	979.80 USD
	Shipping, Handlin	ig, and Tax charges are calculate	d and charged by each	supplier. The	values shown	Subtotal	979.80
	here are for estin	nation purposes, budget checking	, and workflow approva	als.		Tax1	0.00
						Tax2	0.00
						Shipping	0.00
						Handling	0.00
						Iotal	979.80 050
			Save				
(1 item remaining) Downloading pictu	ure http://usertest.sci	quest.com/app_docs/art/printer.pn	g 📑	🗸 Tru	sted sites Protec	ted Mode: On	🔍 100% 🔻

Step	Action
12.	The system will return you to the Financials system and integrate your order into SmartCART. To add more items to your order from the same or different vendor, click the Add Products link. More information is available in the section "Ordering from multiple vendors" section.
13.	To finish shopping, click the Place Order button.



Case Western Reserve	Home Workinst Add to Favorites .Sign out
Menu	Help
- Create Requisition - Manage Requisitions - Receive items Monage Requisitions - Manage Requisitions - Manage Requisitions - Manage Requisitions - Manage Requisitions	quisition <u>efine Requisition <u>3. Review and Submit</u> </u>
Add lines to the r Searcles Commitment Control Ceneral Ledger	equisition, specifying the information necessary to procure each item or service. Q Search Iplates [SmartCART]
Select a Request Requisition Summary Special Item Description Qty UOM OPTIPLEX 960 1 EA MT;OptIPlex 9 Variable Cost Servition	Type Request an item that is not listed in the Catalog. regress a one-time service for a flat fee. Mice Request a service for which the fee is based on the time worked.
Total Lines: 1 Total Amount (USD): 979.80	Request a service for which the fee is based on the time worked and materials used.
Review and	Submit
*	111 F
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Step	Action
14.	Notice the purchase in the Requisition Summary .
15.	To submit the Requisition with your SmartCart order, Click the 3. Review and Submit link.



CASE WESTERN RES	SERVE	
UNIVERSITY	Kr 1826 Home Worklist Add to Favorite	s <u>Sign out</u>
Menu 🗖		
		Help 🔺
Buyer Center		
- Create Requisition	Create Requisition	
- Manage Requisitions		
- Receive Items	1. Define Requisition 2. Add Items and Services 3. Review and Submit	
Services Procurement	Review the details of your requisition, make any necessary changes, and submit it for approval.	
Accounts Payable		
D Commitment Control	Business Unit: CASE1 Case Western Reserve Univ	
D General Ledder	Requester: TRNA001 Nicole N Dyme *Currency: USD	
Demuisitien Commence	Requisition Name: Priority: Medium	•
Description OfvillOM	Paguicitian Lines	
OPTIPLEX 960 1 EA	Line Description Vendor Name Quantity IIOM Price	Tota
MT;OptiPlex 9		
Total Lines: 1	CEI 1 OPTIPLEX 960 M CODIPIEX 960 M Dell Computers 1.0000 Laur 979.80000	979.8
Total Amount (USD) 979.80	Select All / Deselect All Total Amount: Total Amount:	979 80
	Add to Favorites 02 Add to Template(s)	
	Justification/Comments	
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	Save & submit Save & preview approvals Cancel requisition	
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	€W	÷.
Done	□ √ Trusted sites Protected Mode: On	100% -

Step	Action
16.	The Create Requisition screen appears.
	To complete your requisition, follow the same steps to create a requisition. Click the paper next to each line item to enter the due date, verify or change shipping, and enter the Speedtype and verify the account information.

Each line item will need to have a SpeedType entered. The advantage of this being per line is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will recieve their own Purchase Order from SmartCART.

User Manual SmartCART Manual



Step	Action
17.	Enter your SpeedType in the Speedtype field and verify the account number is correct.
	Justification/Comments will not be seen by a buyer, it is not necessary to enter information. However, if there is an approval, that person will see the comments.
	Speed Type OPR261221

Case Western Re UNIVERSITY	SERVE Home Workist Add to Favories Sion	out
Menu	1. Uetine Requisition 1. Jetine Requisition 1. Jetine Requisition	
▷ Buyer Center		~
- Procurement Matrix - Create Requisition	Review the details of your requisition, make any necessary changes, and submit it for approval.	
- Manage Reguisitions	Business Unit: CASE1 Case Western Reserve Univ	
- Receive Items	Requester: TRNA001 Nicole N Dyme *Currency: USD	
Services Procurement	Requisition Name: Priority: Medium	
Accounts Payable		- 11
Commitment Control	Requisition Lines	
D General Ledger	Line Description Vendor Name Quantity UOM Price To	ta
Requisition Summary	✓ 1 <u>OPTIPLEX 960 MT:OptiPlex 960 M</u> Dell Computers 1.0000 Each 979.80000 979.	81
Description Qty UOM	Consolidate with other Reds Consolidate with other Reds	
OPTIPLEX 960 1 EA	Shinoing Line: 1 Due Date: Duantity: 1 0000	
MT;OptiPlex 9		
	Status: Active *Ship To: CEDARAP 🔍 🔛 Modify Shipping Address	
Total Lines: 1		
Total Amount (USD): 979.80	Attention: Nicole N Dyme	
	*Distribute by Amt	
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	1 100.0000 979.80 OPR261221 Q 531200 Q Q + -	
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	Total Amount: 979.80	U
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	Justification/Comments	
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Step	Action
18.	Click the Save & Submit button.
	You may Check Budget first if you prefer.



Case Western Res	ERVE			-	Home Worklist	Add to Favorites	Sign out
Menu eProcurement buyer Center							<u>Help</u>
- Procurement Matrix - Create Requisition - Manage Requisitions - Receive Items - My Profile	Confirmation						
 ▷ Services Procurement ▷ Accounts Payable ▷ Commitment Control ▷ General Ledger 	Requested For: Requisition Name:	Nicole N Dyme 1000099291	Number of L Total Amoun	ines: nt:	1 979.80 USD		
Requisition Summary	Requisition ID: Business Unit:	1000099291 CASE1					
Description Qty UOM OPTIPLEX 960 1 EA MT;OptiPlex 9	Priority: Budget Status:	Medium Not Checked					
MI (JOBITER 9 Total Lines: 1 Total Amount (USD), 979.80	Budget Status: Stage: 1 Requisition Amount and Cat Pending Ken Fusion Submit Submit View printable version for	Not Checked	nding Apply Approval Changes eate New Requisition	Check	Budget		
				3	🇔 🌍 Internet	A 1	00% •

Step	Action
19.	The Confirmation screen appears. If there are approvals, those will appear in the Approvals box. If you are a self approver, the item will be approved and processed. You can view and monitor the requisition the same way you do for any Special Requests you order by clicking Manage Requisitions.
20.	
	End of Procedure.



Ordering from multiple vendors

This section explains how, SmartCART allows orders from multiple vendors and suppliers on the same Requisition. Each supplier receives a Purchase Order.

In addition, each item is a line on the requisition. Therefore, each line item will need to have a SpeedType entered. The advantage of this is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will recieve their own Purchase Order from SmartCART.

Procedure

To begin, log in to Financials and proceed to the SmartCART Home page.

CASE WESTERN RESERVE			^
UNIVERSITY IN 1826	Home Worklist Add to Favorites	Sign of	ut -
Personalize Content Layout		Help	
Menu 🛛 🗖 🕅			
Search			
Search.			
N Mu Foundites			
Employee Self-Service			
▷ Vendors			
D Purchasing			
D eProcurement			
D Accounts Pavable			
D Commitment Control			
D General Ledger			
D Case Departmental Deposits			
D SCM Integrations			
Set Up Financials/Supply Chain			
D Worklist			
D Tree Manager			
D PeopleTools			
- My Personalizations			
- <u>My System Profile</u> My Dictionant			
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Step	Action
1.	Click the eProcurement link. ▷ eProcurement
2.	Click the Create Requisition link. You may also follow the navigation on the left Menu to Create Requisition.
3.	The Create Requisition screen appears. Click the 2. Add Items and Services link. 2. Add Items and Services



Step	Action
4.	Click the SmartCART tab. SmartCART
5.	Click the SmartCART link. SmartCART

Case Western Res	VERVE Home Worklast Add to Favorites Sign out
Menu	Micole N Dyrme profile Nicole N Dyrme profile Nicole N Dyrme profile Home/Shop Search for Catalog No. (SKU)
- <u>Manage Requisitions</u> - <u>Receive Items</u> - <u>My Profile</u> Sension: Procurement	nome/shop ravomes i roms i carts i nistory i settlement i prome o shop settlement i ?
Services Frochement Accounts Payable Commitment Control General Ledger	Shop Everything advanced search go advanced
Requisition Summary	Go to: favorites quick order Browse: suppliers categories
There are no lines on this request. Please add new line in order to save this requisition	Action Items ? Showcased Suppliers ? - My Orders
Total Lines: 0 Total Amount (USD): 0	Carts - Recently Completed (5)
	CASE WESTERN RESERVE UNIVERSITY EST. 1826 Punch-out Lab Supplies
	Welcome to the SmartCart!
	Office/Computer
	MRO/Facilities
Done	GRAINGER

Step	Action
6.	The SmartCart Home page appears.
	For this example, click the Staples Advantage button.

The Showcased Suppliers section will have links to suppliers that Procurement wants to highlight such as new suppliers to the system or those that are having specials.

Punch Out suppliers are those that have catalogs you will order from directly.

Hosted catalogs are those that have catalogs that the University hosts that you can purchase from.



Case Western Re	ESERVE	
Menu	- re 1826	<u>Home Worklist Add to Favorites Sign out</u>
Buyer Center	SelectSite Punchout	Cancel Punch-out
- Procurement Matrix		
 Create Requisition 		
- Manage Requisitions	Connecting to punchout Please	wait
- Receive Items	connecting to punchout ricuse	ware
N Services Procurement		
D Accounts Pavable		
Commitment Control		
D General Ledger	2	
Demisition Comment		
There are no lines on this request		
mere are no intes on this request.		
Please add new line in order to		
save this requisition.		
Total Lines: 0		
Total Amount (USD). 0		
1 Done		👩 🌍 Internet 🔍 100% 🔹 🖉

Step	Action
7.	Staples is a Punchout catalog, the system is going directly to the Staples eway website.





Step	Action
8.	The Staples website appears. Click the Products menu item to see a list of all Staples Categories. For this example, click the Binders & Accessories link. Binders & Accessories



Step	Action
9.	Enter the quantity to purchase in the Qty field. For this example, enter "5".
10.	Click the Add To Cart button.



CASE WESTERN RI UNIVERSITY	ESERVE			<u>Home</u> <u>Workin</u>	st <u>Add to Favorites</u> <u>Sign out</u>
	SelectSite Pun	chout			Cancel Punch-out
- Procurement Matrix - Create Requisition - Manage Reguisitions - Receive Items - My Profile	STAPLES	Keyword Item Numbe	set Default S Search 02/10/10	home Support Log Off hopping List -List 1	S11.98 Items: 1 Order #:NOT SAVED
 Services Procurement Accounts Payable 	Products	Toner & Ink She	opping Lists		
Commitment Control General Ledger					~
Poquisition Summany	Item STP64891	has been added to yo	our cart		
There are no lines on this request. Please add new line in order to save this requisition.		Qty Item No./AKA 5 STP648919	Description Unit Staples Poly Binder, \$2.2 Green, 1" Ring Diameter	t Price Symbols (Key) A 25/EA	Availability TBD ams ship within 1-3
Total Lines: 0					usiness days
					Continue
Done				🏹 🌍 Internet	: • • 100% •

Step	Action
11.	The detailed item information appears. Click the Continue button.
	Continue





Step	Action
12.	Continue to follow the same steps to order more items. When finished shopping, click the Go to Cart button.

CASE WESTERN R UNIVERSITY Menu	ESERVE							<u>Home</u>	<u>Worklist</u> <u>A</u>	dd to Favorites	Siqn out
	Sel	ectSite Pun	hout							Cancel Punch-o	ut
- Procurement Matrix		cerone r and	inout								
Create Requisition Manage Requisitions Receive Items My Profile	ST		Keyword Ite	m Number	se D	HC t Default Sh 2/10/10-	nopping List	oport · Lo	og Off Car	S11.98 Items: 1 Order #:NOT SAVED	
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Accounts Payable Commitment Control	Pro	oducts	Toner & Ink	Shopping Li	sts						
> General Ledger	To add a	n item to your Car	t, enter a quantity in	the Qty field and pre	ess Tab. Er	nter the Ite	em Number i	n the Item N	lo, field and pr	ess Tab. (More)	~
	-										
Poquicition Summany				<u>Sh</u>	opping Ca	rt Items					
There are no lines on this request.			To locate w	our caved ordere pla	200 2000	o Ordor S	Statue and c	elect the or	lor		
			To locate y	our saveu orders pre	ase acces	S Order .	status anu si	electure on	Jei.		
Please add new line in order to save this requisition.				(SECURE CHECKOUT)				Printable Vers	ion
Total Lines: 0					Augilable I	Paalvardar	e Heit	Eutopolog			
Total Amount (USD): 0	Qty:	Ordered Item:	To Be Shipped:	Item Description:	Qty: (Dackorder Qty:	Price:	Price: S	Symbols: (Key)	Item Note:	
	5	STP648919	STP648919	Staples Poly Binder, Green, 1" Ring Diameter	5	0	\$2.25 / EA	\$11.25	\$		
]								
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				Sub Total:	\$11.25						
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Step	Action
13.	The Staples shopping cart will appear with all the items purchased. If the cart is correct, click the Secure CheckOut button.



	SERVE			Home	Worklist	Add to Favorit	es Sign out
Procurement	SelectSite Pun	chout				Cancel	Punch-out
- Create Requisition - Manage Reguisitions - Receive Items - My Profile Sendres Programment	STAPLES Advantage	Keyword Item Number Search	Home Set Default Shopping Lis 02/10/10-List 1	Support I L	og Off /iew	Cart w Items: Order #:NOT	\$11.98 1 SAVED
Accounts Payable Commitment Control	Products	Toner & Ink Shopping Lists					
D General Ledger	c	lick the "Confirm Order" button to complete su or click the "Back to Previous Page" button	Ibmission of your order to edit your order.				<u>^</u>
Requisition Summary There are no lines on this request.	Order Lines	🕲 Back to Previous Page 🔇 Co	nfirm Order				
Please add new line in order to save this requisition.	Qty: Ordered To Be Item: Shipped:	Description:	Avail BO Qty: Qty: Notes:	Unit Price:	Extended Price:		
Total Lines: 0 Total Amount (USD): 0	5 51P048919 51P048918	 Staples Poly Binder, Green, 1° King Diameter 	5 0	\$2.207 EA	\$11.25		
				Sub Total Estimated Tax	\$11.25 \$.73		
				Total	\$11.98		
	Disclaimer: We reserve th immediate availability may item of comparable quality additional charges for deli time of processing.	e right to substitute with similar items of com y become unavailable. We will automatically t y and ship the item as soon as it becomes av very and installation are not reflected in the o	parable quality. Occasion pack order that item and/ vailable. If your order cont rder total and may be add	nally item(s) d or provide a si ains furniture ded to this ord	lisplaying imilar items, ler at the		
	For questions regarding a customer care departmen	backorder or a substitution on your order, ple t.	ease contact your sales r	epresentative	orour		
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Step	Action
14.	Review the Order. Click the confirm order button.
	Confirm Order

CASE WESTERN RES	SERVE					
CNIVERSTIT	197 1826			<u>Home</u>	<u>Worklist</u> Ad	d to Favorites Sign out
Menu 🗖						
	Amast	Nicole N Dyme profile		2010-0	4-09 TRNA001 01	1 item(s), 11.00 USD
▷ Buyer Center						
- Procurement Matrix		Cart - Draft Requisition	Se	arch for Catalog	No. (SKU) 👻	Go
- Create Requisition	home/shop	favorites forms	carts			profile 😞
- Receive Items	antine cost des	h ander I. Enveriten I. mu annak annuisik				2
- My Profile	active care drai	clares lavorites my recent requisit	ions			
Services Procurement	Create Cart			Ad	d Products 🔶 Edit	Cart -> Place Order
Accounts Payable						
Commitment Control			Save			
- Seneral Ledder	Cart Name	2010-04-09 TRNA001 01				
	Prepared for	Nicole N Dyme				
Requisition Summary	Prepared for	Select a different user				
There are no lines on this request.	Prepared by	Nicole N Dyme				
Please add new line in order to		Suppl	ier / Line Item Details	5		?
save this requisition.	Show line details		For selected	line items Add	To Favorites	✓ Go
Total Linear	Staples Adva	ntago				
Total Amount (USD)"	Staples Auva	incage more into	7 I da 1			
Total Allount (USD).	Click this messag	e for more details.	erefore your ability to edit	t or view the item	s in this applicatio	n may be limited.
	The following line	s cannot be accessed on the supplier's we	bsite. Click this message	for more details	Line(s): 1	
	Product Desc	ription	Catalog No	Size / Packaging	Unit Quantit Price	y Ext. Price 🕅
	Staples Prese	ntation Binder, 6 Sleeve Cap., White 🔶	more info STP463380	EA	2.20 5	EA 11.00 USD
					Supplier subtotal	11.00 USD
	Shipping, Handlin	ig, and Tax charges are calculated and ch	arged by each supplier. T	'he values shown	Subtotal	11.00
	nere are for estin	nation purposes, budget checking, and wo	rknow approvais.		Tax1	0.00
					Tax2	0.00
					Handling	0.00
					Total	11.00 USD
			Save			
			🗸 TI	rusted sites Prote	cted Mode: On	♥ 100% ▼



Step	Action
15.	To add more items from a different vendor to the SmartCART cart, click the Add Products link.

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Menu 🗖	D011626			Home Workist	Add to Pavonies	Sign out
eProcurement Buyer Center	Amart	<i>cole N Dym</i> e profile		2010-04-01 TRNA00	1 01 1 item(s), 11.25 U	JSD 🔷
- Procurement Matrix	CO ^T C Ho	me/Shop	Se	arch for Catalog No. (SKU)	2	Go
- Manage Requisition	home/shop	favorites forms	carts	history settlement	profile	۲
- <u>Receive Items</u> - <u>My Profile</u>	shop settlement					12
D Services Procurement D Accounts Payable		Everything	~			
Commitment Control General Ledger	Shop			Go	search	
- Contrar Longon		Go to: favoritas Louisk o	dar Browser su	uppliers L categories		_
Requisition Summary		Go to: lavorites quick of	der browse: su	ippliers categories		
Disess add any liss is adapt.	Action Items		? Showcase	ed Suppliers	_	?
save this requisition.	- My Orders	ompleted (5)				
Total Lines: 0	Carta - Ketenny Cr	Simpleted (3)	BIORAD	🛛 🔛 🔛 🕄 🗑 BI	2	
Total Amount (USD): 0						
	CASE	Western Reserve	E			5
	UN I	VERSITY EST. 182	6 Punch-out	t.		?
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	weicome to	the Sinal Call	Airgas		т	
			Aligu			
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			MRO/Enciliti			
			riko/raciid			
			GRAINGE	R		~
Done				🥡 🌍 Internet	R 100%	

Step	Action
16.	For this example, we will order a computer. Click the Dell button.
	The Punchout will go to the Dell Premier website.



Case Western Reser	VE
	Home Worklist Add to Favorites Sign out
Menu	
▷ Buyer Center	SelectSite Punchout Cancel Punch-out
- Procurement Matrix	
- Create Requisition	Junited States Buy Online or Call 1-800-388-8239
- Manage Requisitions	
- Receive Items	
D Services Procurement	B&LL)
Accounts Payable	
Commitment Control	
D General Ledger	
Requisition Summary	
There are no lines on this request.	
Please add pow line in order to	
save this requisition.	
	(beil)
Total Lines: 0	\smile
Total Amount (USD). 0	
	Please wait while your customized Premier page is loaded.
	-
	2010 Ubili For Customers of the 50 unded States and the Userici of Columbia only. Site Terms
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F	or shipments of certain products to California, state environmental fee of up to \$25 per item will be added at order invoice. For shipments of certain items to Alberta, Canada, a provincial
in the second	voice. Pricing, specifications, availability and terms of offers may change without notice and are not transferable. Offers may not be combined with other discounts or promotional offers, nor anoticable restorking changes are extra vary, and are not subject to discount. Offer valid only for endusive customers, and not for results by customer. Deli cancel be reasonabile for or
	onsequences of misuse of site and its functions and reserves the right to cancel orders arising from such errors. Refer to your invoice for final information regarding order detail, including
ь	een rounded to the nearest dollar for online display. Additional terms and conditions may apply. All sales are subject to Dell's Terms and Conditions of Sale unless you have a separate
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Step	Action
17.	The Premier website will appear and will be loading.





Step	Action
18.	Choose and/or customize the item to purchase and click the Add to Cart link.



Step	Action
19.	Click the Create Order Requisition button.
20.	Choose the correct option for Trade Compliance. In our example, click the I WILL NOT export this order outside the United States. option.



Case Western Re UNIVERSITY	ESERVE rer skiels <u>Home</u> <u>Workfast</u> <u>Add to Favorites</u>	Sign out
Menu 🔳		
	SelectSite Punchout	nch-out
- Create Requisition	💴 United States Buy Online or Call 1-800-388-8239 Case Western Reserve University (Institutional	Purchases ^
- Manage Requisitions		
- Receive Items	Shop Support Premier	
- My Profile	(D&LL)	
D Accounts Payable	Systems v Standard Configurations v Software & Peripherals	~
Commitment Control		
> General Ledger	Windows [®] . Life without	Walls [™] . (
Requisition Summary There are no lines on this request.	Shipping Secure Shopping Currantee	
Please add new line in order to	SHIPPING PAYMENT VERIFY & SUBMIT ORDER REQUISITION	
save this requisition.		-
	* Indicates Required Fields	
Total Lines: 0		
Total Amount (USD). 0	Continue	
	Shipping & Handling Method	
	Delivery Option	
	No Charge - Lowest Cost 3-5 Day Delivery	
	O 2nd Business Day Delivery - Fast Delivery. Your order will be delivered up to 2 business days after it ships.	_
	Next Business Day Delivery - Fastest Delivery. Your order will be delivered on the next business day after it ships.	
	* Trade Compliance	
	 I WILL NOT export this order outside the United States. 	
	I WILL export this order outside the United States.	
	The export of any product and software purchased from Dell must be made in accordance with all relevant laws of the United States,	~
		>
Done	📑 🛞 😱 Internet	100% -

Step	Action
21.	Click the Continue button.





Step	Action
22.	Review the order. Printing the Order Summary and Order Details are also available from this page.

CASE WESTERN RE	ESERVE	
UNIVERSITY	rer 1836 Home Worklist Add to Fav	vorites Sign out
Menu 🗖		
▷ Buyer Center	SelectSite Punchout	cel Punch-out
- Procurement Matrix		
- Create Requisition	SHIPPING PAYMENT VERIFY & SUBMIT ORDER REQUISITION	^
- Manage Requisitions		
- My Profile	Your Order Requisition is nearly complete. Please review the following details and edit if necessary. Select "Submit Order	
Services Procurement	Requisition" (bottom right) to submit.	
Accounts Payable		
Commitment Control		
	Submit Order Requisition	
	Drider Requisition Date and Time:	
Requisition Summary	April 01, 2010 12:46 PM CST	_
There are no lines on this request.	Print Order Summary	
Please add new line in order to	Print Order Details	
save this requisition.		
Total Linea: 0	Shinning & Handling Information Billing Information	
Total Amount (USD) ⁻ 0	Chining a Handing Michael Damag Michael	
Total Alloun (000).	No Charge - Lowest Cost 3-5 Day Delivery Credit Terms	
	Edit	
	70158	
	Contact Information	
	Order Summary Detailed View	
	Description	
	Latitude E4300 W/ Case Software Date & Time: And IOI 2010 12:45 PM CST	
	SYSTEM COMPONENTS	
	Latitude E4300 w/ Case Software Qty 1	
	Intel® Core™ 2 Duo SP9400 with VT (2.40GHz) w/Latitude ON™ ready, Unit Price \$1,005.21	
	Genume Windows Vistale Business SP2 Downgrade,XP Professional SP3 Install F	
	Catalon Number 25 RCRC957231-2118676	10101
	23 NOR0372312110010	×
Done	T 🛞 🖬 Internet	100% ·

Step	Action
23.	Click the Submit Order Requisition button.



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S ONIVERSITI	54:1826	<u>Home Worklist Add to Favorites</u> Sign out			
Menu 🗖					
eProcurement Buyer Center	Micole N Dyme profile	🏽 🏋 2010-04-01 TRNA001 01 2 item(s), 1,016.46 USD			
- Procurement Matrix	COT Cart - Draft Requisition	Search for Catalog No. (SKU) 🗸			
- Create Requisition	home/shop favorites forms car	ts history settlement profile 😞			
- Receive Items	active cart draft carts favorites my recent requisitions	?			
- My Profile					
Services Procurement Accounts Pavable	Create Cart	Add Products -> Edit Cart -> Place Order			
Commitment Control		ave			
D General Ledger	Cart Name 2010-04-01 TRN0001 01				
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There are no lines on this request.	Select a different user				
	Supplier / Line	a Item Details			
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Total Lines: 0	Dell more info				
Total Amount (USD). 0	The items were retrieved from an external supplier site, therefore y Click this message for more details.	our ability to edit or view the items in this application may be limited.			
	Click the link to MODIFY ITEMS VIEW ITEMS Punch-out retu	Irned: 4/1/2010 1:46:17 PM Line(s): 1			
	Product Description	Catalog No Packaging Price Quantity Ext. Price			
	Latitude E4300;IntelREG CoreTM 2 Duo SP9400 with VT (2.40GHz) w/Latitude ONTM ready 🔶 more info	224-0631 EA 1,005.21 1 EA 1,005.21 USD			
		Supplier subtotal 1,005.21 USD			
	Staples Advantage more info				
	The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details. The following lines reanot be acressed on the supplier's whether. Click this message for more details. Line(s): 2				
	Product Description	Catalog No Size / Unit Quantity Ext. Price			
	Staples Poly Binder, Green, 1" Ring Diameter 🔶 more info	STP648919 EA 2.25 5 EA 11.25 USD			
		Supplier subtotal 11.25 USD			
	Shipping, Handling, and Tax charges are calculated and charged by here are for estimation purposes, budget checking, and workflow as	each supplier. The values shown Subtotal 1,016.46 provals. Tavi 0.00			
		Tax2 0.00			
		Shipping 0.00			
Done		📑 🛞 🍙 🌑 Internet 🔍 100% 🗸			

Step	Action
24.	The order is placed in the SmartCART. Notice both vendors in the same cart. For this example, we are going to purchase another item. Click the Add Products link. Add Products



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Services Procurement Accounts Payable Commitment Control General Ledger	Shop	Everything	×	Go advanced search
Requisition Summary		Go to: favorites quick orde	r Browse: suppliers categorie	35
There are no lines on this request. Please add new line in order to save this requisition. Total Lines: 0 Total Amount (USD): 0	Action Items - My Orders Carts - Recently Comple Carts - Recently Comple Carts - Recently Comple UNIVE Welcome to the	ted (5) VESTERN RESERVE E R S I T ΥEST. 1826 a SmartCart!	Showcased Suppliers EIOTHAD Punch-out Lab Supplies Airgas Office/Computer Office/Computer MRO/Facilities	BD IDT SURCES
Done				🕒 Internet 🛞 100% 👻

Step	Action
25.	For this example, click the Fisher Scientific button.



User Manual SmartCART Manual



Step	Action
26.	The Fisher Scientific website appears.
27.	For this example, we are going to use the Search. Enter " test tubes " in the Search box and click the Submit button.



Step	Action
28.	The list of anything with test tube in the name appears.
29.	Choose an item and click the name, in this example, click the Fisherbrand * Reusable Glass Tubes with Phenolic Screw Caps link.



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eProcurement Buyer Center Procurement Matrix	SelectSite Punchout			Cancel Pu	nch-out
Create Requisition Manage Reguisition Receive Items More Profile Services Procurement Accounts Payable Commitment Control	Node N Dyne Faher PurchOut I	- Place Rapid - My Hotlists - My Templat - My Quotes	l Order - View Shopping Cart - View Order Status tes - Review Requisitions	: :	^
D General Ledger	Supplier - Application	Help	MSD	s	
Requisition Summary There are no lines on this request. Please add new line in order to save this requisition. Total Lines: 0 Total Amount (USD): 0 See details					
	Items Details Images				
	Description	Catalog Number	Quantity	Price	
	0.D. x L: 13 x 100mm	14-959-25A	1	Case of 1000 for \$201.59	
	View Accessories		Add to Hot	ist Add to Cart	
	0.D. x L: 16 x 100mm	14-959-25B		Case of 1000 for \$200.46	
	View Accessories		Add to Hot	Add to Cart	~
Done			🗉 🛞 🗔 🤤	Internet 🔍	100% •

Step	Action
30.	Enter the quantity in the Quantity field. For this example enter "1".
31.	Click the Add to Cart button. Add to Cart



CASE WESTERN F	ES	ERVE for 1826			<u>Home Worklist</u>	Add to Favorites	<u>Siqn out</u>
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Buyer Center	-1	SelectSite Punchout				Cancel Pu	inch-out
- Procurement Matrix							
- Create Requisition							~
- Manage Requisitions		test tubes					
- Receive Items			cu	LT TUBE SC CAP 13	X100MM M/CS has		
- My Profile	-1	Submit Substructure Search	bee	en added to your car	t.		
Services Procurement		Certificate Of Analysis					
Accounts Payable							
D Commitment Control							
D General Ledger	~		Fisherbrand* Reusable (Glass Tubes with	Phenolic Screw Caps	> O.D. x L: 13	x
		Shopping Cart View Cart	100mm				=
Requisition Summary		1 Items:					-
There are no lines on this request		CULT TUBE SC CAP 13X100MM					
		M/CS	Test Tubes; Fisherbrand; Re	usable; high-quality	borosilicate Glass; Closure	: black phenolic	
Please add new line in order to		lotal: \$201.59	screw cap; with white rubber	liner; with marking	spot; 0.D. x L: 13 x 100mm	n; No. Per Tray:	
save this requisition.		Checkout	500; Case of: 1000				
			See Details				
Total Lines: 0			See Details				
Total Amount (USD) ¹ 0		For security reasons you					
		logged out after 30 minutes of inactivity.	Accessories re	ecommended for	you.		
			Item Details Acces	sories			
			Accessories	Catalog Numbe	Quantity	Pri	ice
			Fisherbrand* Reusable Glass	02-707-10		()	>
			Tubes with Phenolic Screw			Par	ck of
			Caps, 0.923mm Closures;			100	00 for
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			Fisherbrand* Reusable Glass	02-707-11		6	N
			Tubes with Phenolic Screw				
Dope			1 0 0000 1 1		🙊 📑 🙆 Internet	Pac	100%

Step	Action
32.	Note the item purchased appears in the Fisher Scientific Shopping Cart. The purchase is finished for this example. Click the Checkout link.



Case Western Re UNIVERSITY	SERVE			<u>Home</u> <u>Worklist</u>	Add to Favorite	es Sign out
Menu	SelectSite Puncho	but			Cancel I	Punch-out
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General Ledger	Log Out of Fisher session	NOTE: You must click 'Sul your purchasing applicati lost. If you need to further edi existing cart and then re- purchasing application to	mit' to return your c on, otherwise your c t this cart, please su punchout from your edit the cart.	art to art will be bmit the		
		Shopping Cart		Account Number: 94	3590-001	
		Fisher Cart				
		Description / Cat. No.	Qty. / Price	Availability	Sub-Total	
		14-959-25A CULT TUBE SC CAP 13X100MM M/CS	1 Case of 1000 for \$201.59	Estimated Delivery: 4/12/2010 From: FLORENCE, KY (CDC)	\$201.59	
				Group Total:	\$201.59	
			SHC	OPPING CART TOTAL:	\$201.59	
			Submit 🕽			
Done			🛞 🗸 Truste	ed sites Protected Mode: O	n e	l00% +

Step	Action
33.	The Fisher Scientific confirmation page appears. If the order is correct. Click the Submit Order button.



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Procurement	^	active cart draft carts favorites my recent requisitions	
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Create Requisition			Cause
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My Profile		Cart Name 2010-04-01 TRNA001 01	
ervices Procurement		Prepared for Nicole N Dyme	
Accounts Payable		Select a different user	
commitment Control		Prepared by Nicole N Dyme	
eneral Ledger	~	Supplier /	Line Item Details
		Show line details	For selected line items Add To Favorites 🛛 🖌 😡
equisition Summary	1	Dell more info	
ere are no lines on this request.		The items were retrieved from an external supplier site, therefor	re your ability to edit or view the items in this application may be limited
and and any fact is and as to		Click this message for more details.	re your ability to call of view the items in and application may be initiated
ease add new line in order to		Click the link to MODIFY ITEMS VIEW ITEMS Punch-out	returned: 4/1/2010 1:46:17 PM Line(s): 1
to the requisiton.		Product Description	Catalog No Packaging Price Quantity Ext. Price
tal Lines: 0)	Latitude E4300;IntelREG CoreTM 2 Duo SP9400 with VT	224-0631 EA 1,005.21 1 EA 1,005.21 USD
tal Amount (USD).	J	(2.40GHz) w/Latitude ONTM ready 🔶 more info	
	-		Supplier subtotal 1,005.21 USD
		Fisher Scientific more info	
		The items were retrieved from an external supplier site, therefo Click this message for more details. Click the link to MODIEY ITEMS 1. VIEW ITEMS, Pupph-out	re your ability to edit or view the items in this application may be limited.
			Size / Unit
		Product Description	Catalog No Packaging Price Quantity Ext. Price
		CULT TUBE SC CAP 13X100MM M/CS 🔂 more info	1495925A CS 201.59 1 CS 201.59 USD
			Supplier subtotal 201.59 USD
		Staples Advantage more info	
		The items were retrieved from an external supplier site, therefo Click this message for more details.	re your ability to edit or view the items in this application may be limited.
		The following lines cannot be accessed on the supplier's website	 Click this message for more details. Line(s): 3
		Product Description	Catalog No Size / Unit Quantity Ext. Price
		Staples Poly Binder, Green, 1" Ring Diameter 🔶 more info	STP648919 EA 2.25 5 EA 11.25 USD
			Supplier subtotal 11.25 USD
	_		🕥 🙊 🔽 🕒 Internet 🛞 100%

Step	Action
34.	The purchase goes back to your SmartCART. There are 3 vendor orders in the same Cart. Name this cart for reference by entering a name in the Cart Name field. For this example, enter "Smith Lab Order".
35.	Click the Place Order link.





Step	Action
36.	The items are integrated into Financials. Notice the items in the Requisition Summary to the left. To finish creating the requisition, click the 3. Review and Submit link. <u>3. Review and Submit</u>



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enu	=	1						
Procurement		^						Help
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Step	Action
37.	Click the Expand Section button.

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Step	Action
38.	Enter the correct SpeedType in the Speed Type field.
39.	To input the Accounting Lines for the next item, click the Expand Section button.
40.	Enter the correct SpeedType in the Speed Type field.
41.	To input the Accounting Lines for the last item, click the Expand Section button.
42.	Enter the correct SpeedType in the Speed Type field.
43.	Click the Save & submit button.

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Step	Action
44.	The Approval page appears. If no approvals are necessary, the items are approved. If there are more approvals needed, those will be listed here. To review the requisition, you can use the Manage Requisitions link. Manage Requisitions
45.	This completes How to Place an Order from Multiple Vendors using SmartCART. End of Procedure.



Ship To Locations

Procedure

Shipping Addresses will now be available within the eProcurement system. Users will not need to Modify Shipping Addresses.

The information below will explain how to choose a different shipping address.

If your address is not in the system, please fill out the Ship To Location form on the Procurement website at http://campusservices.case.edu/PDSHome.aspx or by emailing information to smartcart@case.edu.

Step	Action
1.	The Ship To: will default to your ID as the location. If you want to change the location, click the Look up button to see a list or search for a location.

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Step	Action
2.	The Look Up Ship To page appears and will default to the location already in the ShiptTo on the screen, in this example it was a user ID.
	For the Description: click contains from the dropdown list.
3.	Enter a short search into the Description field, for example, enter " cedar " to send an item to the Accounts Payable office.
4.	Click the Look Up button.



Step	Action
5.	Results for any description that has the word cedar will appear. To send to Accounts Payable, click the CEDARAP link.



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Step	Action
6.	The Ship To: is now CEDARAP. To make sure the address is correct, click the Review Shipping Address link. Review Shipping Address





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Step	Action
7.	A non-editable Shipping Address screen appears. Review for accuracy, when finished click OK to return the requisition.
8.	For questions on Ship To: locations contact Procurement and Distribution at 368-2560 or email smartcart@case.edu End of Procedure.



Viewing Carts and Draft Carts

This section will demonstrate how to view and navigate your carts.

Procedure

To begin, log into Financials and proceed to Create Requisiton and navigate to the SmartCART Home Page. See the document "Using the SmartCART System" for information.

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Step	Action
1.	The SmartCART home page has an Action Items box that will appear after you have placed SmartCART orders. Click the Carts - Recently Completed (5) link.
	Carts - Recently Completed (5)



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Step	Action
2.	Click the 380810 link. The My Recent Requisitions screen appears. There will be a list of all the SmartCART purchases with the name, date/time, total dollar amount purchased. Click the Cart number link of the cart you would like to view. 380810



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Step	Action
3.	The cart opens with the Supplier/Line Item Details.
	The items purchased in this cart and details are able to be viewed.
4.	Click the draft cart menu item.



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▷ Buyer Center		Nicole N Dyme profile		Se	elect Draft Cart or	Add Item to Cart
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- Manage Requisitions						
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There are no lines on this request.	ेल	2010-04-06 TRNA001 01	4/6/2010		0.00 USD	Delete
Please add new line in order to save this requisition. Total Lines: 0 Total Amount (USD): 0						
Done				📑 😜 Inter	rnet	🔍 100% 🔹 🖉

Step	Action
5.	A list of My Drafts will appear. These are carts that have not been ordered or have been started and not completed. To return back to the SmartCART Home, click the home/shop object.
6.	This concludes the section on Viewing your Carts in SmartCART. End of Procedure.



Searching in SmartCart

This section describes using the search feature in SmartCART. Searching in SmartCART is only available for **Hosted Catalogs**. Punchout Catalogs <u>can not</u> be searched within SmartCART

Procedure

To begin,log into Financials and navigate by Creating a Requisition and entering the SmartCART Home Page.

Step	Action
1.	" <i>Shop at the Top</i> " is located on the home page. The drop down allows you to narrow your search by categories.



Step	Action
2.	Click the <i>Shop</i> dropdown to view a list of the searchable categories.
3.	Enter your the key words for the items to search in the Shop field. For our example, enter " tubes ".
4.	The first time the search is used, set your preferences to allow searching for all like items with the keywords. Click the advanced search link.


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Step	Action
5.	Click the change preferences link.
	change preferences





Step	Action
6.	Click the Always include similar terms for searches option.



Step	Action
7.	Click the Save button.
	Save



6 Create Requisition - Windows Inte	ternet Explorer	×
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There are no lines on this request.	All of These Words tubes Supplier	
Please add new line in order to save this requisition.	Part Number (SKU) Manufacturer Name	
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Total Amount (USD). 0	Other Options	
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Step	Action
8.	Click the Search button to execute your search.
	Search





Step	Action
9.	The search returns all items with the keywords you entered from all Hosted Catalog suppliers.
	To purchase an item from your search, proceed to enter the amount and add to your cart.
	Process the order and cart.
10.	This completes how to search Hosted Catalogs in the SmartCART system. End of Procedure.



Approving Requisitions ordered in SmartCART

Procedure

To begin, log into Financials and click your Worklist to begin.

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D Inventory	From	Date From Work Item	Worked By Activity	Priority	Link	
 ▷ eProcurement ▷ Services Procurement ▷ Program Management 	Nicole N Dyme	04/01/2010 Approval Routing	Approval Workflow	2-Medium 🔽	Requisition, 1881, BUSINESS UNIT:CASE1 REQ. ID:1000099292	Ma
 Project Costing Accounts Payable eSettlements 	Nicole N Dyme	03/30/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1872, BUSINESS UNIT:CASE1 REQ ID:1000099291	Ma
 ▷ Banking ▷ VAT and Intrastat ▷ Commitment Control ▷ General Ledger 	Nicole N Dyme	03/30/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1871, BUSINESS_UNIT:CASE1 REQ_ID:1000099290	Ma
 SCM Integrations Set Up Financials/Supply Chain 	Nicole N Dyme	03/29/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1862, BUSINESS UNIT:CASE1 REQ ID:1000099289	Ma
Enterprise Components Worklist Worklist	Nicole N Dyme	03/29/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1861, BUSINESS_UNIT:CASE1 REQ_ID:1000099288	Ma
- <u>Worklist Details</u> - <u>Navigator</u> D Tree Manager	Nicole N Dyme	03/25/2010 Approval Routing) Approval Workflow	2-Medium 💌	Requisition, 1841, BUSINESS_UNIT:CASE1 REQ_ID:1000099286	Ma
Reporting Tools PeopleTools - <u>Tax Center</u> - Change My Recoverd	Nicole N Dyme	03/18/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1832, BUSINESS_UNIT:CASE1 REQ_ID:1000099285	Ma
- <u>My Personalizations</u> - <u>My System Profile</u> - <u>My Dictionary</u>	Nicole N Dyme	03/17/2010 Approval Routing) Approval Workflow	2-Medium 💌	Requisition, 1791, BUSINESS UNIT:CASE1 REQ ID:1000099281	Ma
	Nicole N Dyme	03/17/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1821, BUSINESS UNIT:CASE1 REQ ID:1000099284	Ma
	Nicole N Dyme	03/17/2010 Approval Routing	Approval Workflow	2-Medium 💌	Requisition, 1801, BUSINESS_UNIT:CASE1 REQ_ID:1000099282	Ma
	<				Doquicition 1761	>
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Step	Action
1.	The Worklist screen looks the same, choose a requisition by clicking on the detailed link (for example Requisition, 1881, BUSINESS_UNIT:CASE1 REQ_ID:100009929) in the link column.



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()»	Requisitio	n Approval					
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Manager Self-Service	Requester:	Nicole N Dyme		Puoinooo Unit	01054		
Supplier Contracts	Entered on:	04/01/2010		Busiliess Ulit.	CASET		
D Vendors	Statuc	Dending		Requisition ID:	1000099292		
Purchasing	status.	Pending		Priority:	Medium		
▷ Inventory	Requester's	Justification:					
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Services Procurement	🖉 Edit I	Requisition					
Program management Project Costing	 Line Information 	mation					
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Step	Action
2.	The Requisition Approval screen appears.
	As in all requisitions being approved you can Edit the Requisition or Approve or Deny it.
	NOTE: Editing at this point will not update the SmartCART so the Requision and Purchase Order will not be in sync when doing historical searches.
	To Approve the Requisition, click the check box for the item(s) to approve.



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vendors Purchasing Inventory eProcurement		2 CULT TUBE SC 2 CAP 13X100MM M	FISHER SCI-001	1.0000	CS 201.59000	USD	
Services Procurement Program Management		3 Staples Poly Binder, Green,	CORP EXP-001	5.0000	EA 2.25000	USD	
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Step	Action
3.	Click the Approve button.

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- Tax Center					
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- My System Profile					
- My Dictionary					
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Step	Action
4.	The Confirmation of approval screen appears.
5.	You may return to your worklist.
	Click the Return to Worklist link.
	Return to Worklist
6.	This conludes the section on how to approve SmartCART requisitions.
	Note after approvals, there is not buyer a Purchase Order will automatically be created for the items ordered
	End of Procedure.



Manage Requisitions that were created in SmartCART

This section will explain how to view and manage the created requistions from SmartCART.

Procedure

To begin, log into Financials and navigate to the SmartCART Home page.



Step	Action
1.	The navigation path for Manage Requisitions is not different for SmartCART. Click the eProcurement link. Perocurement
2.	Click the Manage Requisitions link. Manage Requisitions



Search Requisi Search Requisi Business Unit: Requisition ID: Date From: Requestor	itions tions, edit the criteria bel CASE1 Q	ow and click the Sea Requisition Request Sta	arch button.		New Window E	Help Customize Page Page
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Step	Action
3.	As you can see, the Requisitions that were created in SmartCART appear the same as those created using the Special Item option. Click the Select Action dropdown to see options for the Requisition. Select Action
4.	Click the Circle of Life icon to see the status of the processing of the Requisition.



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D General Ledger	o view the lifespan and line items for a requisition, click the Green Circle icon:	<u>ل</u>
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K		
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Step	Action
5.	Note the status. The status Pending Approval indicates there are approvals in the workflow.
6.	Click the Req ID link for the requisition to view. 1000099296



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- <u>Procurement Matrix</u> - <u>Create Requisition</u> Manage Requisitions	Line Item Description	Source Status	Amoun Only	Qty	F	rice	Status	Total		
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 ▷ Set Up Financials/Supply Chain ▷ Worklist ▷ Tree Manager 	Return to Manage Requisitions	Requisition Sch	edule and Dis	tribution						
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- My Dictionary										
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Step	Action
7.	The Requisition opens with a list of the items. To see the details about each item, click the item name link.
	CD3/CD4/CD45 with Trucount T



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- <u>My Dictionary</u>				Supplier subtotal	79.50 US	D
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				Handling	0.00	
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Done				Internet	100%	• ,

Step	Action
8.	The SmartCART cart appears with the item information. Depending on the vendor, some will allow View Details links which will allow you to go to the cart and view the item(s) you purchased.
9.	To return to the Manage Requisitons screen, click the Manage Requisitions link in the left Financials Menu. Manage Requisitions



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	Requisition Approvals Inventory Purchase Change Receiving	Returns Invoice Payment
	Line Description Status Price Curr 1 Tube Strips and Domed Cap PO Created 175.00000 USD	Quantity UOM Vendor 4.0000 EA Bio Rad Laboratories
Done		👩 🌍 Internet 🔍 100% 🝷 🚲

Step	Action
10.	In this example, in Manage Requisitons, this SmartCART item has a PO Created in the status. Utilize the Cycle of Life within Financials Manage Requisitions to follow the life of your requisition and Purchase Orders.
11.	The concludes the section how to Manage Requisitions that were created in SmartCART. End of Procedure.



Copying Carts for new orders

This section explains how to copy a SmartCART carts and place a new order of the same items.

Procedure

To begin, log into Financials and navigate to the SmartCART Home page.

Step	Action
1.	Click the carts menu item.
	carts

CASE WESTERN RESI UNIVERSITY	ERVE			Home Work	list Add to Favo	orites Sign out
v eProcurement	Amont Nicole N Dyme	profile	[2	🕎 2010-04-09 TRNA	001 01 1 item(s)	, 11.00 USD
- Procurement Matrix	COUT Home/Shop		Search f	or Catalog No. (SKU)	T	Go
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- My Profile	active cart draft carts favorites	my recent requisitions				1.5
Services Procurement		Turn this s				
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D General Ledger					Jeanen	
Requisition Summary		Go to: favorites quick order	Browse: supplie	ers categories		
There are no lines on this request.	Action Items	?	Showcased S	uppliers		2
Please add new line in order to	- My Orders					
save this requisition.	Carts - Recently Completed (5)			DD .		E
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Total Amount (USD): 0						
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Step	Action
2.	Click the my recent requisitions object.
	my recent requisitions



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♥ eProcurement ▶ Buyer Center – Procurement Matrix	^	Amort CO		me profile ant Requisitions		Search for Ca	Select Draft Cart or talog No. (SKU) ▼	Add Item to Cart
		home/sh active cart	nop favorit draft carts fa	es forms vorites my recent requisition	carts IS	history	settlement	profile 😞
 Services Procurement Accounts Payable 				No. 8-				
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- General Leuyer	-	status	379900	2010-04-06 TRNA001 02	4/6/2010 4	:10 PM	284.00 USD	resubmit cart
Requisition Summary		× ·	380810	Lab 2 Order	4/8/2010 1	12 DM	1 869 50 USD	resubmit cart
There are no lines on this request.		*	377097	2010-03-30 TRNA001 01	4/6/2010 2	14 DM	1,959.60 USD	resubmit cart
Please add new line in order to		•	370702	2010-04-05 TRNA001 01	4/6/2010 2	11 DM	700.00 USD	resubmit cart
save uns requisition.		•	370004	2010-04-05 TRNA001 02	4/6/2010 4	-27 DM	685.63 USD	resubmit cart
Total Lines: 0		v	373304	2010-04-06 11(10001 02	4/6/2010 4	127 PM	665.62 035	resubilité care
Done							🥫 😜 Internet	🔍 100% 🔹

Step	Action
3.	A list of My Recent Requisitions appears. Click on one of the Requisition No. link. For this example click 379793 .



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eFrocurement eFrocurement erourement Matrix erourement Matrix erourement Matrix erourement Manace Requisition ecceive Items evolutions ecceive Items ecounts Prourement ecounts ecounts	Moode N Dyme profile Summary - Requisition 379793 home/shop favorites active cart draft carts favorites my recent requisitions	Select Draft Cart or Add Item to Cart Search for Catalog No. (SKU) Carts history History settlement Available Actions: Add Comment	nt (* 1
Requisition Summary There are no lines on this request. Please add new line in order to save this requisition. Total Lines: 0 Total Amount (USD)	Summary Taxes/S&H Hide basder Ceneral ? Cart Name 2010-04-06 TENA001 01 Prepared by Nicole N Dyme	; 2 Hide value description	? Ins
Total Anount (03D).	Supplier / Li	ine Item Details ?	?
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	Bio-Rad Laboratories		
	Bio-Rad Laboratories (A) more info	Catalog No Size / Unit Quantity Ext. Price	
	Bio-Rad Laboratories (1) more info Product Description 1 Tube Strips and Domed Cap Strips, 0.2 ml more info	Catalog No Size / Unit Quantity Ext. Price TBC1202 0.2mL 175.00 4 EA 700.00 USD E A)
	Bio-Rad Laboratories Product Description 1 Tube Strips and Domed Cap Strips, 0.2 ml more info Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer Http://www.bio- Information rad.com/pr/an/US/ad, FJ URL UNSPSC 41-12-17-01 more info	Catalog No Size / Unit Price Quantity Ext. Price TBC1202 0.2mL 175.00 4 EA 700.00 USD EA Taxable X Capital Expense X	
	Bio-Rad Laboratories Product Description 1 Tube Strips and Domed Cap Strips, 0.2 ml more info Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer Bio-Rad Laboratories Name Manufacturer IBC1202 Part Number More Information rad.com/prid/an/US/ad, pl URL UNSPSC 41-12-17-01 more info	Catalog No Size / Unit Quantity Ext. Price TBC1202 0.2mL 17.00 4 EA 700.00 USD Taxable X Capital Expense X Supplier subtotal 700.00	
	Bio-Rad Laboratories 🕅 more info Product Description 1 Tube Strips and Domed Cap Strips, 0.2 ml more info Manufacturer Bio-Rad Laboratories Name Manufacturer TBC1202 Part Number More http://www.bio- Information rad.com/prd/an/US/ad,P UNSPSC 41-12-17-01 more info	Catalog No Packaging Price Unit Quantity Ext. Price Direction Control (Control (Cont	
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Step	Action
4.	The detailed cart will open. Click the Available Actions: dropdown list.
5.	Choose Copy to New Cart list item.
	Copy to New Cart
6.	Click the Go button.



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CNIVERSTIT	For 1826	Home	Worklist <u>Add to Favorites</u> Sign out
Menu 🗖			
	Micole N Dyme profile	2010-04	-08 TRNA00101 1 item(s), 700.00 USD
P Buyer Center Procurement Matrix	COT Cort - Droft Requisition	Search for Catala	a No. (SKII) 👻
- Create Requisition		Search for Catalo	g Ho. (SKO)
- Manage Requisitions	home/shop favorites forms	carts history	settlement profile 🔕
- Receive Items	active cart draft carts favorites my recent requisition	ns	?
Services Procurement	Create Cart	0.4	
Accounts Payable		100	a Products - Curcare - Place Order
D Commitment Control		Save	_
V General Ledger	Cart Name 2010-04-08 TRNA001 01		
Requisition Summany	Prepared for Nicole N Dyme		
There are no lines on this request.	Select a different user		
	Prepared by Nicole N Dyme	4	
Please add new line in order to save this requisition	Supplie	r / Line Item Details	2
aure una requiation.	Show line details	For selected line items Add	To Favorites Go
Total Lines: 0	Bio-Rad Laboratories K more info		
Total Amount (USD): 0	Product Description	Catalog No Size / Packaging	Unit Quantity Ext. Price
	Tube Strips and Domed Cap Strips, 0.2 ml more info	TBC1202 0.2mL EA	175.00 4 EA 700.00 USD
			Supplier subtotal 700.00 USD
	Shinning, Handling, and Tax charges are calculated and cha	ned by each supplier. The values shown	Subtotal 700.00
	here are for estimation purposes, budget checking, and wor	flow approvals.	Tax1 0.00
			Tax2 0.00
			Shipping 0.00
			Handling 0.00
			Total 700.00 USD
		Save	
Dope			Distancet

Step	Action
7.	A new cart will appear. Enter a new Cart Name .
8.	Altering the Quantity is allowed if the item is a hosted catalog.
9.	Click the Place Order link. Place Order



Case Western Res UNIVERSITY	SERVE			Home Wo	rklist Add to Favorites	s Sign out
Menu eProcurement b Buyer Center - Procurement Matrix						Help 🔨
Create Requisition Manage Requisitions Receive Items My Profile Services Procurement	Create Requ	isition <u>e Requisition</u> [your requisition, make any ne	2. Add Items and Servi ecessary changes, and submit it for a	ices 3. F	Review and Submit	
Accounts Payable Commitment Control General Ledger	Business Unit: Requester:	CASE1 Case Wester	n Reserve Univ Nicole N Dyme	*Curre	ency: USD	
Requisition Summary Description Qty UOM Tube Strips and 2 EA Domed Cap 2 EA	Requisition Name: Requisition Lines Line Descrip S= 1 Tube S	tion	<u>Vendor Name</u> Bio Rad Laboratories	Quantity UOM	ity: Medium <u>Price</u> 175.00000	<u>Tota</u>
Total Lines: 1 Total Amount (USD): 350.00	Select All / De	select All ites 😰 Add to Template(s)		Delete	Total Amount:	350.00 U
	Justification/Comme	nts	now at Voucher			
	Check Bud	get 유입Save & preview approvals	Cancel requisition	<u>Find r</u>	nore items	
Done	<		ш — — — — — — — — — — — — — — — — — — —	👩 🌑 Inter	rnet 🕀	>

Step	Action
10.	roceed to process the requisition as usual.
11.	This conludes the section how to copy an old cart to re-order or add items. End of Procedure.



Window Shopper Approvers - Approving & Placing Orders

Procedure

Approvers will recieve an email to let them know a cart has been completed and assigned to them.

Once this email has been recieved the approver can log into Financials and proceed to the SmartCART home page.

Step A	Action
1. 4	Approvers will receive an email from support@sciquest.com with the subject of A shopping cart has been assigned to you



Step	Action
2.	The email will be from support@sciquest.com with the subject of A shopping cart has been assigned to you .
	Details will include the name of the Cart, who prepared the cart and who the approve is (yourself). the message will contain messages from the Window Shopper about the purchase and explain how to retrieve the cart.





Step	Action
3.	Point to the + View Assigned Carts * link. Follow the process to log into Financials and Create a Requisition. Navigate to the SmartCART home page.
4.	Click the + View Assigned Carts * link to see the carts that were assigned to you. + View Assigned Carts *



Case Western Res	ERVE (vr. 1826	Home Worklist Add to Favorites Sign out
Menu eProcurement bBuyer Center - Procurement Matrix - Create Requisition - Manage Requisitions - Receive Items - Mu Profile	Jannifer Loudiana profile Home/Shop Favorites forms car shop settlement car	37 2010-04-08 jills1 01 0 item(s), 0.00 USD Search for Catalog No. (SKU) ts history settlement profile 1 // settlement // settlement // ?
Services Procurement Accounts Payable Commitment Control General Ledger	Shop Everything	Go advanced search
Requisition Summary	Go to: favorites quick order	Browse: suppliers categories
There are no lines on this request.	Action Items ?	Showcased Suppliers ?
Please add new line in order to save this requisition.	- My Orders Carts - Recently Completed (5)	BIOFAD RD 🔗 BD
Total Lines: 0 Total Amount (USD): 0	- Assigned Carts My Assigned Carts Carts Assigned to me (2)	SYSTEMS*
		Punch-out ?
	CASE WESTERN RESERVE	Airgas © filition.
	Welcome to the SmartCart!	
	Thank You For Coming	
		MRO/Facilities
		GRAINGER

Step	Action
5.	Click the Carts Assigned to me (2) link. The number in parenthesese, 2 in this example, indicates the number of carts that are to be approved. Carts Assigned to me (2)



Case Western	RESI	ERVE			Home	Worklist Add to Fa	vorites <u>Sign out</u>
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	~	Amost	Jennifer Loudiana profile		_ <u>−</u> 2	010-04-08 ill91 01 0 ii	em(s), 0.00 USD
Buyer Center							
- Procurement Matrix			Shopping Cart - Drafts		Search for Catalo	g No. (SKU) 💙	60
 Create Requisition 		home/shop	favorites form	s carte	bistory	settlement	profile 🔗
 Manage Reguisitions 		nonita, sinop		e caro	instery 1		promo .
- Receive Items		active cart draf	t carts favorites my recent	requisitions			?
- <u>My Profile</u>							
Services Procurement		Create Cart					
D Accounts Payable							
D Commitment Control		Assign Substitute					
D General Ledger	×			My Drafts			legend ?
		Activo Cant	Chopping Cast Mapo	Date Cupated	Cast Description	Total	Delete
Requisition Summary		Active care	shopping care value	Date created	care Description	Total	Delete
There are no lines on this request.		_⊇ज्ज	2010-04-08 jll91 01	4/8/2010		0.00 USD	Delete
-							
Please add new line in order to							
save this requisition.				Drafts Assigned To N	1e		legend ?
Tatallinan		Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
Total Lines. 0			2010 01 05 1 02	4/5/2242		2 020 00 100	
Total Amount (USD).		ेन	2010-04-06 Jcase 03	4/6/2010		3,820.00 050	Delete
		ेन्न	2010-04-08 jcase 01	4/8/2010		819.99 USD	Delete
Done						Internet	🔍 100% 🔹 🖉

Step	Action
6.	The draft carts page appears. Notice there is a new section titled Drafts Assigned to Me. These are the carts from Window Shoppers waiting for approval.
7.	Click the name of the cart to be approved, in this example, 2010-04-08 jcase 01 . 2010-04-08 jcase 01

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	^	smart .	Jennifer Loudiana profile				2010	-04-08 jcase 01 1 i	item(s), 819.9	9 USD
Buyer Center		cont.								
- Create Requisition	-		Sart - Drait Requis	auon		583	ren for Catalog	NO. (SKU)		40
- Manage Reguisitions		home/shop	favorites	forms	carts	hi	story	settlement	profile	8
- Receive Items		active cart draft	carts favorites my	recent requisit	ons					! ?
Services Procurement		Create Cart					Add		Diaco	Order
Accounts Payable		cicate care					1,400	Products P Edit o	are P Place	order
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V General Ledger		Cart Name	2010-04-08 irase 01	1		-				
	1	Prepared for	loe Case							
Requisition Summary			Select a different user							
niere are no inca on ana request.		Prepared by	Jennifer Loudiana							
Please add new line in order to				Suppl	er / Line Ite	m Details				2
save uns requisition.		Show line details			F	or selected li	ne items Add T	o Favorites	*	Go
Total Lines: 0		Dell more info								
Total Amount (USD). 0		The items were ret	ieved from an external su	pplier site, the	refore your ab	lity to edit or	r view the items	in this application r	nay be limited	н. 👘
		Click the link to	MODIFY ITEMS VIEW I	TEMS Punch	out returned:	4/8/2010 1:5	54:47 PM Line	(s): 1		
		Product Desci	iption			atalog No	Size / Packaging	Unit Price Quantity	Ext. Price	
		OPTIPLEX 960 Percent Efficie	S;OptiPlex 960 Small Form nt Power Supply 🔶 🛛 mon	n Factor Base e info	Up to 90	224-5422	EA	819.99 1 EA	819.99 USD	
								Supplier subtotal	819.99	USD
		Shipping, Handling	, and Tax charges are cal	ulated and chi	aroed by each :	upplier. The	values shown	Subtotal	819.99	
		here are for estima	tion purposes, budget che	ecking, and wo	rkflow approval	s.		Tax1	0.00	
								Tax2	0.00	
								Shipping	0.00	
								Total	819.991	ISD
					Save					
Dama	-							Teheveet	1000	

Step	Action
8.	The cart will appear. Review the cart. In some cases a Modify Items and/or View Items option will appear above the item. This is dependent on the vendor and type of catalog that was used to place the order.
	For our example, click VIEW ITEMS to see the details about the purchase. Click the VIEW ITEMS link. MODIFY ITEMS VIEW ITEMS
9.	The example vendor is a punchout so the system is going to the vendor website.





Step	Action
10.	The website page with the order and summary will appear. From this page you may view/print the cart. Point to the View/Print Cart link.
11.	No changes are needed, to return to the SmartCART, click the Cancel Punch-out button in the top right of the page. Cancel Punch-out
12.	Return to the SmartCART cart. The Approver should change the Cart Name if the Window Shopper did not. See "Best Practices appendix in the SmartCART manual"
13.	After reviewing the cart and order, if ready to proceed, click the Place Order link. NOTE: This is the best time to edit the order. See "Appendix on Best Practices" in the SmartCART Manual. Place Order



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Menu eProcurement b Buyer Center					<u>Help</u>
- Procurement Matrix - Create Requisition - Manage Requisitions - Receive Items - My Brofile	Create Requisition Image: Define Requisition Image: Define Requisition		<u>3. Revie</u>	w and Submit	
Commitment Control Commitment Ledger	Add lines to the requisition, specifying the information necessary to procure each item or service. Search: Favorites Templates SmartCART Special Request			Q Search	
Requisition Summary Description Qty UOM OPTIPLEX 960 1 EA MT-OptiPlex 9 1 EA	Select a Request Type Special Item Request an item that is not listed in the Catalog. Fixed Cost Service Request a one-time service for a flat fee. Variable Cost Service Request a service for which the fee is based on the time worked.				
Total Lines: 1 Total Amount (USD): 979.80	Time and Materials Request a service for which the fee is based on the time worked and n	naterials u	ised.		
	Review and Submit				
	۲ (m				•
	Trusted sit	tes Protec	ted Mode: C)n 🕀 :	.00% -

Step	Action
14.	To submit the Requisition with your SmartCart order, Click the 3. Review and Submit link.

Case Western Re	SERVE			_			
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▷ Buyer Center							Help A
- Procurement Matrix							
- Create Requisition	Create Requ	isition					
- Manage Requisitions - Receive Items	1. Defin	e Requisition	2. Add Items a	nd Services	3. Review	w and Submit	
Services Procurement Accounts Pavable	Review the details of	your requisition, make any ne	cessary changes, and sub	mit it for approval.			
Commitment Control General Ledger	Business Unit:	CASE1 Case Western	Reserve Univ				_
	Requester:	j1191	Loudiana,	Jennifer	*Currency:	USD	
Requisition Summary	Requisition Name:	Joe Case			Priority:	Medium	v
Description Qty UOM	Requisition Lines						
OPTIPLEX 1 EA	Line Descrip	tion	Vendor Name	Quantity U	<u>om</u>	Price	Tota _
960S;OptiPlex 960		EX 960S;OptiPlex 960 Sma	Dell Computers	1.0000	Each	819.99000	819.§
Total Lines: 1	Select All / De	select All					
Total Amount (USD). 019.99	Add to Favo	rites 🔯 Add to Template(s)		🗍 Delete	10	ar Amount.	519.99 0
	Justification/Comme	ents					
						~	
	Send to Vendor	Show at Receipt Show	ow at Voucher				2
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	📙 Save & submit	Save & preview approvals	X Cancel requisition		Find more it	ems	
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Step	Action
15.	The Requisition screen appears. Click the Expand Section for each item to proceed to enter Speedtype and shipping details.
16.	Enter the desired information into the Speed Type field. Enter " OPR261221 ".
17.	Click the Save & submit button.

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Menu veProcurement buyer Center Procurement Matrix								<u>Help</u>
Create Requisition <u>Manage Requisitions</u> <u>Receive Items</u> <u>Wrofile</u>	Confirmation							
Services Procurement Accounts Payable Commitment Control General Ledger	Requested For: Requisition Name:	Loudiana,Jennifer Joe Case	Number of L Total Amou	Lines: int:	1 819.9	9 USD		
Requisition Summary Description Qty UOM	Requisition ID: Business Unit:	1000099297 CASE1						
OPTIPLEX 1 EA 960S;OptiPlex 960	Budget Status:	Medium Not Checked						
Total Amount (USD): 819.99	Stage: 1 ✓ Joe Case Amount and Cat Self Approv ✓ _S500 App Submit: View printable version [Approved egory Approval ed lemnier rover Edit Requisition	Apply Approval Changes	Che	eck Budget]		
				6	🖇 📑 🚺 (🎒 Internet	•	100% •

Step	Action
18.	The Requisition Confirmation page appears. Note the item is approved. A Purchase Order will be generated. Joe Case:Approved
19.	To view the status of the Requisition, Click the Manage Requisitions link. Manage Requisitions



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Manage ERP Integration													
- Procurement Matrix		Manage Re	auisitions										
- Create Requisition		✓ Search Requis	itions										
- Manage Requisitions		To locate requisi	tions, edit the criteri	a below an	d click the Se	arch butt	on.						1
- Receive Items		Business Unit:	CASE1	Q	Requisition	Name:							
- Procurement Card Center		Requisition ID:		Q	Request St	atus:	All but Complete	~	Budget St	atus:		*	
- Administer Procurement		Date From:	04/01/2010	Ħ	Date To:		04/08/2010	Ħ	-				
- My Profile		Requester	ill01	0	Entered By			0					
Services Procurement Sourcing					Liner ou Dy		L	~			L		
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Production Control D Configuration Modeler		Requisitions	an and line items fo		inn allalaithe (ula inany 🔹 🔊						
▷ Product Configurations		To view the mesp	an and the terns to	arequisit	ion, click life (Sieen Ci							
▷ Quality		To edit or perform	n another action on a	a requisition	n, make a sel	ection fro	m the Action drop	down lis	it and click G	GO.			
Demand Planning Newontony Policy Planning		Reg ID	Requisition Nar	ne	BU	<u>Date</u>	<u>Status</u>	Budg	et]	Fotal	Main Conte	nt	
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D Lease Administration		Create New Requ	isition Inquire Ch	ange Regu	lest Inquire F	Receipts	Requisition Re	port					
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Excise and Sales Tax/VAT	~ <]			Ш							_	>
Done								8	🛛 🧊 🌍 I	internet		💐 100%	•

Step	Action
20.	The Joe Case requisition is in the list of Requisitions and shows a status of Approved. The Purchase Order will be dispatched within 20 minutes of approval/submission.
21.	Use the Select Action dropdown to manage the requisition. However, editing a SmarCART requisition that has been approved is not possible. The PO process for SmartCART items runs about every 20 minutes.
22.	The completes the section about approving and managing Window Shopper orders in SmartCART. End of Procedure.



Appendix: Best Practices using SmartCART

Procedure

SmartCART is an additional way to purchase items from vendors using eProcurement. This section lists some best practices when working with SmartCART purchases that will make your work easier and navigation through the history easier.

Search Preference - Set up your search to be able to find similar terms. Click Advanced Search in Shop at the Top -> Search preferences -> Make sure Similar terms box is checked. See "Using the SmartCART System" section in this manual for detailed screen shots and information on set up.

Cart Name - The Cart Name will default to today's date, your ID, and a number, for example 2010-04-07 TRNA001 01. This naming scheme can become problematic when you are working with multiple cart purchases in the same day as well as working with Window Shopper carts.

The Best Practice recommendation is that the name be changed to something meaningful regarding the items in the cart. For example, Joe Smith (purchasing for), or Summer 2010 lab supplies (location and term purchase), January 2010 Office supplies (regular purchase by month).

Editing Items - The ability to edit SmartCART carts is available anytime while you are in SmartCART.

The Best Practice recommendation is to edit and finalize the cart for purchase before clicking Place Order or Assign Cart. This allows the cart to stay in synch with your Requisition and Purchase Order. Modifications may be done in PeopleSoft Financials, however, keep in mind that the Requisition and the Cart may not be the same when you view them historically.

Editing Assigned Carts from Window Shoppers - The ability to edit Window Shopper carts is available.

The Best Practice recommendation is the same as when creating carts in SmartCART through eProcurement make sure to edit and finalize your carts in SmartCART. Approvers are able to delete and change quantities in Window Shopper carts.

Ship To: locations - Ship To locations will be in the system. Before doing purchasing in SmartCART check eProcurement to see that other locations for your department are there. The are locations you normally would enter in the Modify Shipping Address area for one time shipping. The location associated with your ID will be the same.

How to check - Log into PeopleSoft Financials -> Click eProcurement -> Click Manage Requisitions -> Choose any Requisition and Copy it -> Click the paper \$ icon to expand one of the items. Click the lookup icon (looking glass) next to the Ship To: box to see the list and descriptions of locations. To view the additional department locations, search for the building, they will be coded by building and room. When finished, Cancel this requisition.



Step	Action
1.	
	End of Procedure.



Appendix: Processing Returns from SmartCART orders

SmartCART has changed the return process for items. Contact the vendor Customer Service to process returns. Contact Procurement & Distribution for more details at 368-2560 or smartcart@case.edu

Procedure

SmartCART has changed the return process for items. Contact the vendor Customer Service to process returns. Contact Procurement & Distribution for more details at 368-2560 or smartcart@case.edu



Appendix: Mac OS X and Safari 4 using SmartCART

Procedure

This document describes how eliminate the error "This application was uanable to route the session back to the login".



Step	Action
1.	If you receive this error after clicking on the SmartCART link from the Financials system, follow these steps to remedy the issue.
2.	Go to the Safari Menu. Click Preferences.
3.	Click the Security button.
4.	Check the radio button Always for the Accept cookies: section.
5.	Close the window. Close Safari, open and continue using SmartCART with Financials.
6.	
	End of Procedure.



Appendix: Airgas Shipping Information

Procedure

This document explains how to check and verify shipping addresses for Airgas deliveries that are ordered through SmartCART.

Start by navigating eProcurement -> Create a Requisition

Step	Action
1.	Enter your Requisition Name and click the 2. Add Items and Services link. 2. Add Items and Services
2.	Click the SmartCART tab. SmartCART
3.	Click the SmartCART link. SmartCART
4.	Continue to the SmartCART Home page and buy the items from Airgas. When ready to order, Click the Place Order button.
	Details on How to use SmartCART are in the SmartCART and Window Shopper Manuals at http://www.case.edu/projects/erp/learning/finguides.html
5.	After you have Placed the Order in SmartCART you are returned to Financials.
	Click the 3. Review and Submit link.
	3. Review and Submit



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- <u>Manage Requisitions</u> - <u>Receive Items</u>	1. Defin	e Requisition	2. Add Items and Se	ervices	3. Review and Subr	nit
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Step	Action
6.	Click the Payment and Shipping Icon.



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Step	Action
7.	To see the current address associated with the Ship To: code, Click the Review Shipping Address link.



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Step	Action
8.	Review the Address information. If the address is incorrect , fill out this form to update the information https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dk JBT0M3eTgxQVV1TGc6MQ&AuthEventSource=SSO Click the OK button to return to the requisition.
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Step	Action
9.	If you want to change the location your order will be shipped to, click the look up icon .



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Step	Action
10.	The Look Up Ship To page appears.
	Enter the location you want to search in the Ship To Location field. Use the "begins with" or "contains" dropdown to help with your search, for example if you are not sure of the building code, use contains.
11.	Click the Look Up button.



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Step	Action
12.	A list of locations that match your search will appear. Click the link of the location and room you want to ship your items.



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Step	Action
13.	The location is now in the Ship To field. To double check click the Review Shipping Address link to verify.
	Proceed to enter your Speedtype and submit the requisition.



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Step	Action
14.	Comments entered in the Justification/Comments section, will not be seen by the Vendor! This comments field should not be used for SmartCART orders to communicate with the vendor.



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Step	Action
15.	Use the Attention: field to change the name to the correct person receiving the items. If you are using a generic building and room number, we recommend that you use this field for your name and any clarifying remarks that you would typically provide
	the Airgas team. The field is limited to 30 characters.
16.	Click the Save & Submit button to process your requisiton and order.
17.	Additional Contact Information: General SmartCART inquiries : - By E-mail SmartCART@case.edu. - By Phone, Customer Care Team 368-2560.
	Airgas Assistance: - By E-mail airgas@case.edu. - By Phone,
	Ship-to Location Assistance: - By E-mail cwrushipto@case.edu
	To request an addition or modification complete this form: https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dk JBT0M3eTgxQVV1TGc6MQ&AuthEventSource=SSO
	End of Procedure.

