



Tulane eProcurement Essentials

Updated 2022-12-07

Tulane University eProcurement

POWERED BY
JAGGAER *

* FORMERLY
SCIQUEST

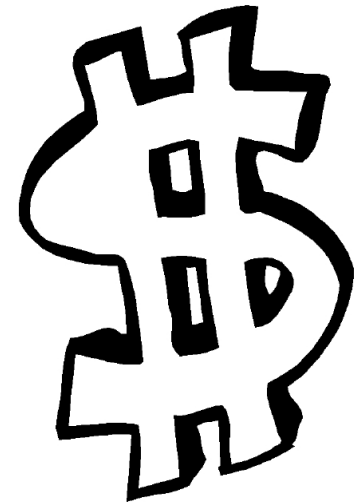
What is eProcurement?

An online system for **requesting, approving, and ordering** goods and services, managing payments, and tracking orders.



How does eProcurement work?

Tulane eProcurement guides authorized users through a system that identifies items to be purchased, collects information about the proposed transaction, seeks transaction approvals, and then issues a **purchase order** to the supplier to complete the transaction.



Essential eProcurement Terminology – Part 1

Supplier – party contracted to provide goods or services
(also, *vendor*)

Shopping Cart – holds items selected by a shopper for purchase via a punch out catalog or a shopping form

Punch Out Catalog – supplier catalog accessible within ePro; selected items are added to a Shopping Cart. Punch out catalogs are one way to initiate a request for a PO.

Shopping Forms – specialized forms in ePro to collect information and add items to a shopping cart. Shopping forms are another way to initiate a request for a PO.

Quote – cost estimate from a supplier for goods or services. Quotes are used with shopping forms to add items to a shopping cart to initiate a request for a PO.

Purchase Requisition or PR – a request for a PO for goods or services; originates from a shopping cart

Purchase Order or PO – a contract between Tulane and a supplier to provide requested goods or services; originates from a requisition

Approval Workflow – requisition approval process; a PO is issued when a requisition has been fully approved

Retroactive PO – a PO issued “after-the-fact” to pay an invoice for a transaction conducted without ePro approvals or a PO contract being issued in advance as required. Retroactive POs are issued only to fulfill university obligations when transactions are initiated against policy. Retroactive POs should not be used to conduct regular business.

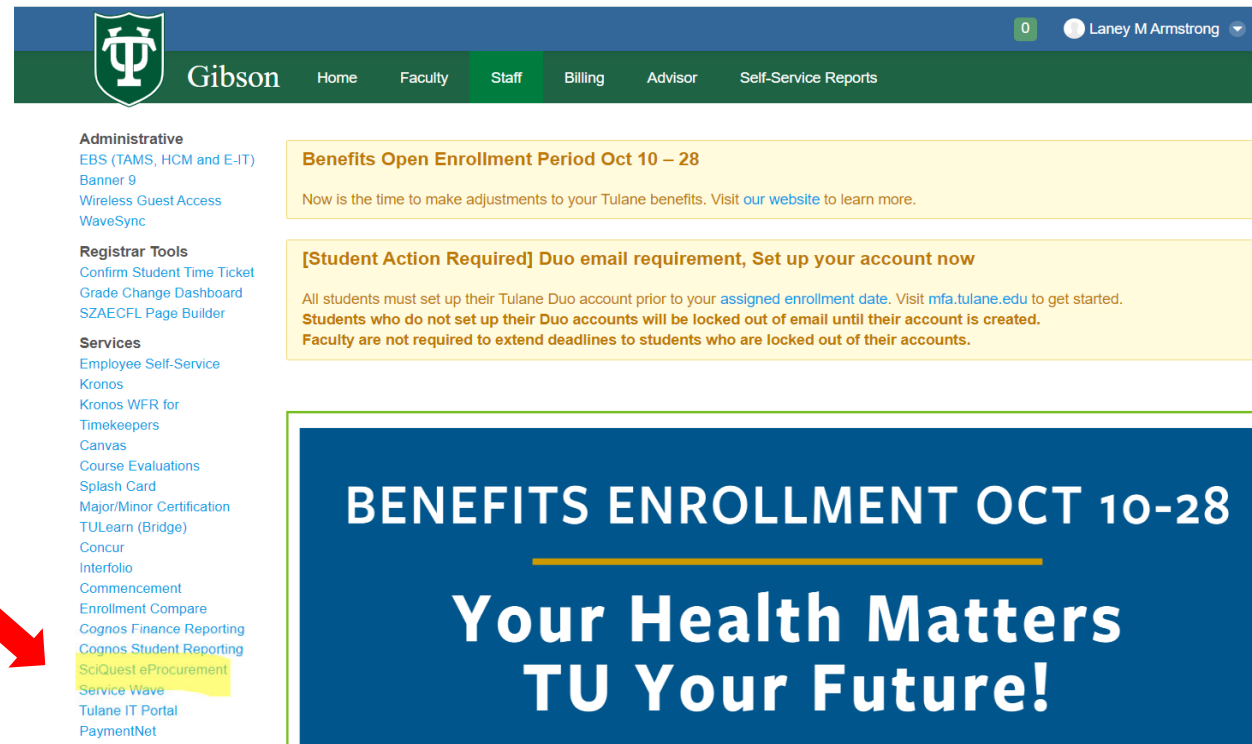
Check Request – allowable retroactive PO; only for certain transactions types (see <https://epro.tulane.edu/content/nat-accounts-check-requests>)

Invoice – supplier’s request for payment after goods or services have been provided (also, *bill*)

Accounts Payable or AP – Tulane department that accepts and manages payment of supplier invoices

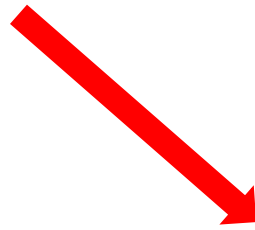
Receipt or Receiving Report – online acknowledgement that goods or services have been received and Tulane AP may pay the supplier’s invoice

Launching eProcurement



The screenshot shows the Gibson website interface. At the top right, there is a user profile for 'Laney M Armstrong' with a dropdown arrow. Below this is a navigation bar with links for 'Home', 'Faculty', 'Staff', 'Billing', 'Advisor', and 'Self-Service Reports'. The 'Staff' link is highlighted in green. On the left side, there is a vertical menu with categories: 'Administrative' (EBS, Banner, Wireless Guest Access, WaveSync), 'Registrar Tools' (Confirm Student Time Ticket, Grade Change Dashboard, SZAECFL Page Builder), and 'Services' (Employee Self-Service, Kronos, Kronos WFR, Timekeepers, Canvas, Course Evaluations, Splash Card, Major/Minor Certification, TULearn, Concur, Interfolio, Commencement, Enrollment Compare, Cognos Finance Reporting, Cognos Student Reporting, SciQuest eProcurement, Service Wave, Tulane IT Portal, PaymentNet). The 'SciQuest eProcurement' link is highlighted in yellow. A red arrow points from the text on the left to this link. On the right side, there are two yellow announcement boxes. The top one is titled 'Benefits Open Enrollment Period Oct 10 – 28' and contains the text: 'Now is the time to make adjustments to your Tulane benefits. Visit our website to learn more.' The bottom one is titled '[Student Action Required] Duo email requirement, Set up your account now' and contains the text: 'All students must set up their Tulane Duo account prior to your assigned enrollment date. Visit mfa.tulane.edu to get started. Students who do not set up their Duo accounts will be locked out of email until their account is created. Faculty are not required to extend deadlines to students who are locked out of their accounts.' At the bottom right, there is a large blue banner with white text that reads: 'BENEFITS ENROLLMENT OCT 10-28' followed by 'Your Health Matters TU Your Future!'.

Log into Gibson and select
SciQuest eProcurement
from Staff Services



or Launch from Procurement page by linking to: <https://epro.tulane.edu/content/eprocurement>

Tulane University eProcurement
All
Search (Alt+Q)
0.00 USD

Shop • Tulane Shopping Dashboard

Shop

Simple Advanced
...

Q

Showcase

Purchase Order Request Forms


Blanket/ Service Order
FORM TO REQUEST A PO


Non-Catalog Supplies
FORM TO REQUEST A PO

Request for Temporary Staffing
FORM TO REQUEST A PO


Check Request
FORM TO REQUEST A CHECK


Electronics, Furniture & General Office Suppliers






BLICK
art materials







Organization Message

Welcome to Tulane eProcurement

ePro is Tulane's online system for requesting, approving, and ordering goods and services, managing payments, and tracking orders.

eProcurement LIVE ONLINE Training Sessions

Intro to ePro for Requesters: Oct 20 @ 10am (2 hrs)
Advanced ePro: Purchase Contracts & Agreements: Oct 27 @ 11am (2 hrs)
Advanced ePro: Mastering POs and Check Requests Nov 1 @ 10am (2 hrs)
Intro to ePro for Requesters: Nov 10 @ 10am (2 hrs)
ePro for Approvers: Nov 16 @ 11am (1 hr)
Advanced ePro: Searches & Reports: TBD (2 hrs)
ePro for Shoppers: (1 hr)

Helpful Tips & Training

Helpful Tips:

*** Ordering From PPE Stockpile ***

- Requirements for Reqs \$25,000 or More
- Requestor Spending Limits
- Shipping Address Best Practices
- How to Determine Your User Role
- Change "Prepared for" Field and Shopper on a Requisition
- How to Turn OFF eProcurement Requisition

Action Items

MY ASSIGNED APPROVALS

[Requisitions To Approve](#) 18

[Change Request](#) 1

UNASSIGNED APPROVALS

[Requisitions](#) 6

ADMINISTRATIVE ITEMS

[Import/Exports - Completed](#) 1

Quick Links

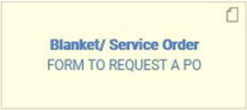



- [Request TAMS/SciQuest Access](#)
- [Tulane Amazon Business FAQ's](#)
- [Nat. Accounts Available for Check Requests](#)
- [Buy-Pay Matrix Spreadsheet \(2020/12/02\)](#)
- [View Favorites](#)

Three ways to initiate a transaction in eProcurement






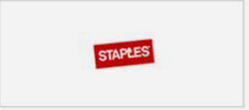
- Punch Out Catalogs**
Request a PO for goods or services from a supplier's online catalog hosted in eProcurement
- Shopping Forms**
Request a PO for goods or services from a supplier NOT hosted within eProcurement
- Check Request Form**
Request payment for an invoice issued WITHOUT a PO, but only if it's an allowable transaction type

Showcase



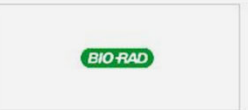









Purchase Order Request Forms

			
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Electronics, Furniture & General Office Suppliers

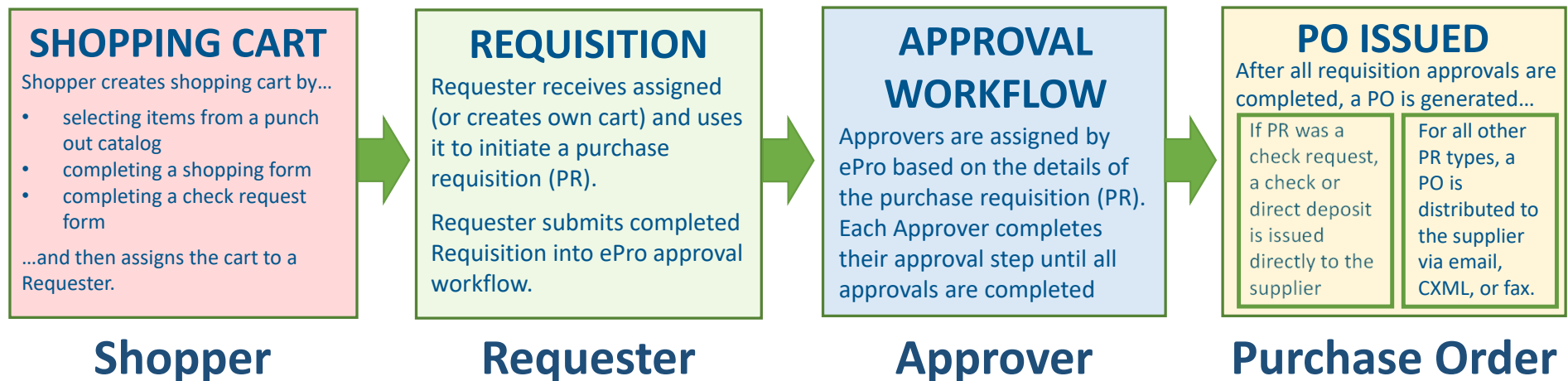
			
			

Medical & Laboratory Suppliers

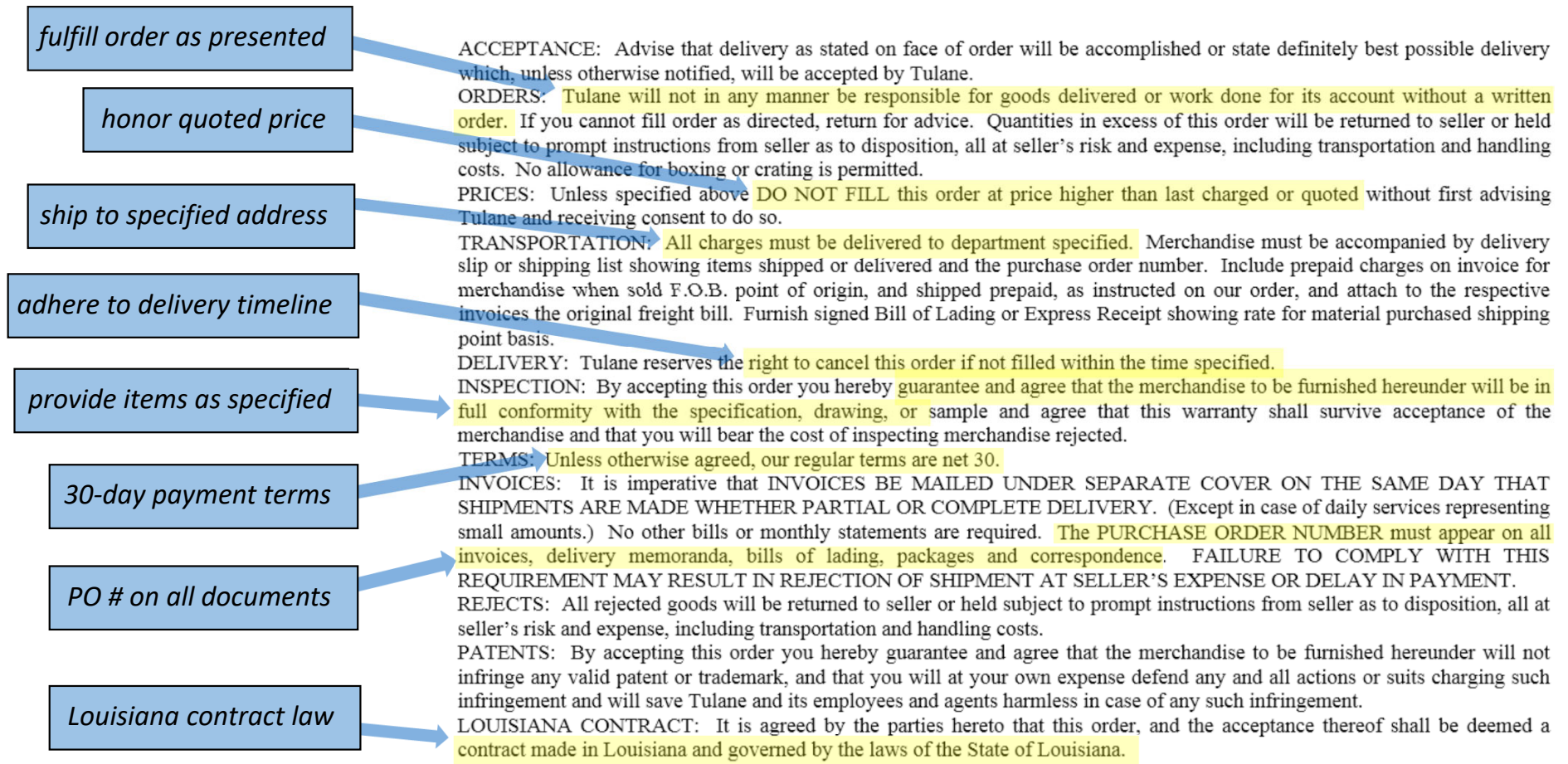
			
			
			

eProcurement Roles & Workflow

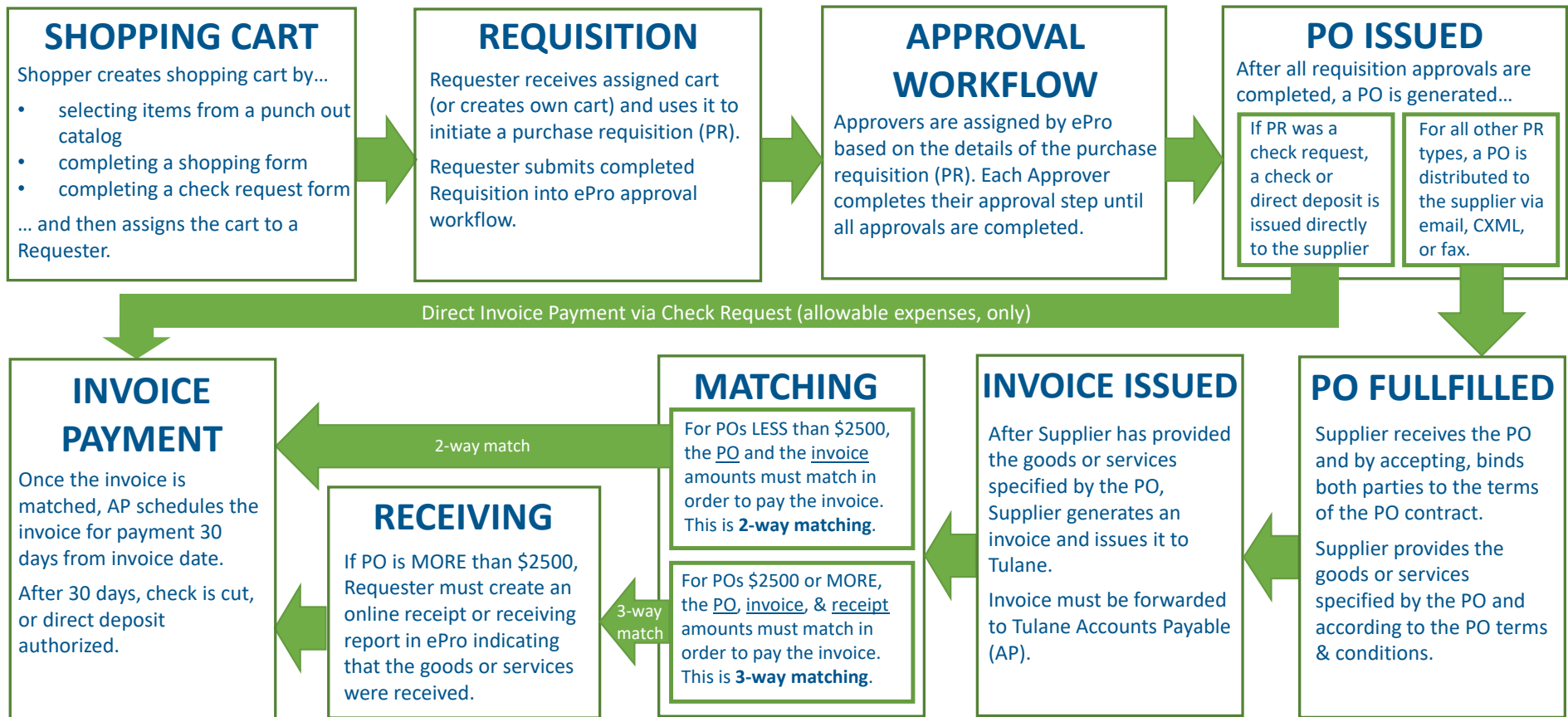
- Shopper**
Fills a virtual shopping cart with goods or services selected from a punch out catalog OR completes a PO request form. Assigns cart to a Requester. Anyone at Tulane can be a Shopper.
- Requester**
Accepts a shopping cart from a Shopper and uses it to initiate a requisition. Requesters can also start requisitions based on their own shopping carts. Submits requisition into approval workflow.
- Approver**
Approves requisitions submitted into approval workflow, as assigned to them by eProcurement.



**TULANE UNIVERSITY
STANDARD PURCHASE ORDER TERMS AND CONDITIONS**



eProcurement Workflow



Essential eProcurement Terminology – Part 2

Invoice – supplier’s request for payment after goods or services have been provided (also, *bill*)

Payment Terms – Tulane’s terms for paying invoices, specified in the purchase order. The PO and its terms must be accepted by the supplier in order to conduct the transaction. Tulane’s standard terms are *30 days, net*, which means that valid invoices will be paid thirty days from the *invoice due date*

Invoice Date – date on which the invoice was created by the supplier. This is the date that appears on the supplier’s invoice.

Invoice Due Date – target date for Tulane to pay an invoice. Due date is calculated from *Invoice Date + 30 net days*. Note that in practice, date supplier receives payment is often later than due date when taking into account check payment cycles and delivery times.

Accounting Date – date AP receives the invoice and enters it into the payment system

Receipt or Receiving Report – online acknowledgement that goods or services have been received. Required for POs more than \$2500. Usually completed by Requester.

Matching – process to ensure that goods or services have been received and the invoiced amount is authorized for payment. Matching compares PO, invoice, and receipt amounts to determine if an invoice should be paid.

Two-Way Match – For transactions where total PO is less than \$2500. Compares PO and invoice amounts. If PO and invoice amounts match, invoice is automatically scheduled for payment without any further authorization.

Three-Way Match – For transactions where total PO is \$2500 or greater. Compares PO, invoice, and receipt amounts (receipt is acknowledgment that goods or services received). Invoice can only be scheduled for payment if all three match.

Receipt Required Notification – an email sent to the PO owner notifying him/her that a receipt is required to complete invoice matching.

Important Contacts:



eProcurement Support

SciQuest.Support@tulane.edu

eProcurement Training

eProSupport@tulane.edu

Accounts Payable (check requests)

Lisa LaBlanc lleblanc@tulane.edu

University Controller and Director of Central Procurement

Jim Wandling jwandlin@tulane.edu

Important Links:

Materials Management (Purchasing)

<https://procure.tulane.edu>

Tulane Purchasing Basics:

<https://epro.tulane.edu/content/tulane-purchasing-basics>

Essential guidelines for purchasing goods at Tulane

Institutional Computer Purchases at Tulane

<https://epro.tulane.edu/content/institutional-computer-purchases-tulane>

Computer standards and purchasing guidelines

Tulane Service Catalog:

<https://tulane.service-now.com/ess>

