Tulane eProcurement Essentials
Tulane University eProcurement

POWERED BY

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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

Log into Gibson and select **SciQuest eProcurement** from Staff Services

**OR**
Launch from Procurement page by linking to:  [https://epro.tulane.edu/content/eprocurement](https://epro.tulane.edu/content/eprocurement)
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
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.

**SHOPPING CART**
Shopper creates shopping cart by...
- selecting items from a punch out catalog
- completing a shopping form
- completing a check request form
...and then assigns the cart to a Requester.

**REQUISITION**
Requester receives assigned (or creates own cart) and uses it to initiate a purchase requisition (PR).
Requester submits completed Requisition into ePro approval workflow.

**APPROVAL WORKFLOW**
Approvers are assigned by ePro based on the details of the purchase requisition (PR). Each Approver completes their approval step until all approvals are completed.

**PO ISSUED**
After all requisition approvals are completed, a PO is generated...
- If PR was a check request, a check or direct deposit is issued directly to the supplier
- For all other PR types, a PO is distributed to the supplier via email, CXML, or fax.

Shopper  |  Requester  |  Approver  |  Purchase Order
What is a Purchase Order?

A purchase order or PO is a contract issued by the university that, once accepted by a supplier, becomes a binding agreement.

The PO contract includes a set of Terms & Conditions that the supplier must follow if they accept the PO.

The Terms & Conditions protect Tulane and the supplier.

To be valid contract, a PO must be issued before the transaction occurs.

Note that all transactions completed in eProcurement result in a purchase order.
TULANE UNIVERSITY
STANDARD PURCHASE ORDER TERMS AND CONDITIONS

ACCEPTANCE: Advise that delivery as stated on face of order will be accomplished or state definitely best possible delivery which, unless otherwise notified, will be accepted by Tulane.

ORDERS: Tulane will not in any manner be responsible for goods delivered or work done for its account without a written order. If you cannot fill order as directed, return for advice. Quantities in excess of this order will be returned to seller or held subject to prompt instructions from seller as to disposition, all at seller’s risk and expense, including transportation and handling costs. No allowance for boxing or crating is permitted.

PRICES: Unless specified above DO NOT FILL this order at price higher than last charged or quoted without first advising Tulane and receiving consent to do so.

TRANSPORTATION: All charges must be delivered to department specified. Merchandise must be accompanied by delivery slip or shipping list showing items shipped or delivered and the purchase order number. Include prepaid charges on invoice for merchandise when sold F.O.B. point of origin, and shipped prepaid, as instructed on our order, and attach to the respective invoices the original freight bill. Furnish signed Bill of Lading or Express Receipt showing rate for material purchased shipping point basis.

DELIVERY: Tulane reserves the right to cancel this order if not filled within the time specified.

INSPECTION: By accepting this order you hereby guarantee and agree that the merchandise to be furnished hereunder will be in full conformity with the specification, drawing, or sample and agree that this warranty shall survive acceptance of the merchandise and that you will bear the cost of inspecting merchandise rejected.

TERMS: Unless otherwise agreed, our regular terms are 30 days.

INVOICES: It is imperative that INVOICES BE MAILED UNDER SEPARATE COVER ON THE SAME DAY THAT SHIPMENTS ARE MADE WHETHER PARTIAL OR COMPLETE DELIVERY. (Except in case of daily services representing small amounts.) No other bills or monthly statements are required. The PURCHASE ORDER NUMBER must appear on all invoices, delivery memoranda, bills of lading, packages and correspondence. FAILURE TO COMPLY WITH THIS REQUIREMENT MAY RESULT IN REJECTION OF SHIPMENT AT SELLER’S EXPENSE OR DELAY IN PAYMENT.

REJECTS: All rejected goods will be returned to seller or held subject to prompt instructions from seller as to disposition, all at seller’s risk and expense, including transportation and handling costs.

PATENTS: By accepting this order you hereby guarantee and agree that the merchandise to be furnished hereunder will not infringe any valid patent or trademark, and that you will at your own expense defend any and all actions or suits charging such infringement and will save Tulane and its employees and agents harmless in case of any such infringement.

LOUISIANA CONTRACT: It is agreed by the parties hereto that this order, and the acceptance thereof shall be deemed a contract made in Louisiana and governed by the laws of the State of Louisiana.
For POs $2500 or MORE, Requester must create an online receipt or receiving report in ePro indicating that the goods or services were received.

For POs LESS than $2500, the PO and the invoice amounts must match in order to pay the invoice. This is 2-way matching.

For POs $2500 or MORE, the PO, invoice, & receipt amounts must match in order to pay the invoice. This is 3-way matching.

After Supplier has provided the goods or services specified by the PO, Supplier generates an invoice and issues it to Tulane. Invoice must be forwarded to Tulane Accounts Payable (AP).

Supplier receives the PO and by accepting, binds both parties to the terms of the PO contract. Supplier provides the goods or services specified by the PO and according to the PO terms & conditions.
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