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

What is Tulane’s eProcurement system?
Tulane’s choice for an eProcurement system is **Jaggaer eProcurement**

How does eProcurement work?
Jaggaer eProcurement is primarily a **workflow manager**.

eProcurement guides users through the steps required to request, approve and then order or pay for goods and services.
Why eProcurement?
- Efficiencies
- Ease of Use
- Visibility
- Compliance
- Speed
- Communications
- Cost Savings

Why Jaggaer eProcurement?
- Market leader in eProcurement
- Formerly SCiQUEST now JAGGAER
Purchasing Goods and Services

eProcurement is for...

**Purchase Orders**
- Request purchase of goods & services
- Catalog and non-catalog orders
- Replaces TAMS requisitions

**Check Requests**
- Pay invoices for goods & services already received
- Only some nat acct codes allowed
- Replaces Concur Check request

Other ways to pay for goods and services (or request reimbursements)

- **PCards** - purchase limits still apply (will become more restrictive in the future)
- **T&E card** - travel and entertainment expenses
- **Concur** - personal and travel reimbursements for Tulane employees
- **ITs (Interdepartmental Transfers)** - payments and transfers between departments
Important Terms

• Supplier
• Shopping cart
• Purchase Requisition (PR)
• Purchase Order (PO)
• Shopper
• Requester
• Approver

Although the terms are often used interchangeably...

• *Jaggaer* (formerly *SciQuest*) is the company
• *eProcurement* or *ePro* is the product
eProcurement Roles

• **Shopper**
  • Creates shopping cart by selecting items for purchase (for purchase order) or entering invoice for payment (for check request)
  • Cannot complete a purchase – assigns cart to Requester
  • All Tulane faculty, staff, and students can be Shoppers

• **Requester** (or Requisitioner)
  • Accepts cart assigned by Shopper (or creates new cart) and generates purchase requisition (PR)
  • Requesters have spending limits as set by their department - spending limits determine if a PR requires financial approvals
  • Requester is responsible for reporting when goods are received

• **Approver**
  • Designated by organization to approve PRs
  • An organization may have multiple Approvers
  • An Approver can also be a Shopper and/or a Requester; however an Approver cannot approve his or her own requisitions
eProcurement Step-by-Step

**SHOPPER**
Shopper creates shopping cart...
- by selecting items from an online catalog
- by submitting purchase info or a quote from a non-catalog supplier
- by submitting an invoice to be paid by check
... and then assigns the cart to a Requester.

**REQUESTER**
Requester receives the cart and uses it to create a purchase requisition (PR).
Requester populates PR with shipping location, accounting information (org, account/project, natural account), and other information required to complete transaction.
Requester submits completed PR into ePro work flow.

**APPROVER**
Purchase requisition (PR) is automatically routed for financial and other approvals based on ePro work flow rules.
Financial Approvers are pre-defined by work flow and reflect departmental approval hierarchy. Additional approvals may be required depending on cost and what is being ordered.

**COMPLETED**
After all PR approvals are completed, a purchase order (PO) is generated and sent directly to supplier for fulfillment.
If PR was a check request, then a check is scheduled to be cut and sent.
Jaggaer eProcurement works with TAMS
TAMS is still the underlying accounting system

To be an eProcurement Requester, you must have TAMS access to the accounts you will be authorized to spend from:

- An individual’s access to Tulane budget accounts is set in TAMS
- When a PR is submitted into work flow, eProcurement checks with TAMS to determine if the requester has access to the referenced accounts

Visit the Tulane Technology Service Catalog to request TAMS access
http://tulane.service-now.com/ess

Detailed instructions for completing TAMS access form on Tulane eProcurement site:
https://epro.tulane.edu/content/eprocurement
Requester Spending Limits

<table>
<thead>
<tr>
<th>Requester Level</th>
<th>Spending Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester0</td>
<td>$0</td>
</tr>
<tr>
<td>Requester1</td>
<td>$250</td>
</tr>
<tr>
<td>Requester2</td>
<td>$1000</td>
</tr>
<tr>
<td>Requester3</td>
<td>$2500</td>
</tr>
</tbody>
</table>

- ALL Requester spending limits are $0 for check requests
- Limit is per purchase requisition (not a daily or monthly limit)
- All new SoM requesters will default to Requester0; all others to Requester2

Requisitions LESS THAN the spending limit **DO NOT** require org approval
Requisitions MORE THAN the spending limit **DO** require org approval
Log in to eProcurement!

Use eProcurement Test for this Workshop

http://tinyURL.com/SQtest100
Let’s Get Started!
Organizational approval is required for PRs more than the Requester’s spending limit.

Shopper Creates cart and assigns to Requester. Shopper has no purchase or approval authority.

All Requesters and some Approvers may also create carts.

Requesters have a fixed spending limit set by their departments that “pre-approves” them to spend up to that amount without additional organizational financial approvals.

Additional financial approvals required for PRs $10,000 or more (Dean level approval) and $100,000 or more (Sr. VP approval)

If PR is LESS than Requester’s spending limit

PR is MORE than spending limit

 OEHS approval for chemical purchases.
 IT Governance approval for non-standard technology purchases.
 Other category approvals may apply.

PR is LESS than $2,500

PR is MORE THAN $2,500

Purchase Order generated and issued to Supplier.

Materials Management reviews all PRs $2500 or more

Purchase Order

Materials Management (Purchasing) reviews PR

Only some PRs require category approval: chemicals, drugs, computers. More may be added.
Non-Catalog Supplies Purchase Workflow

**Shopper**
- Creates cart and assigns to Requester.
- Shopper has no purchase or approval authority.

**Requester**
- All Requesters and some Approvers may also create carts.
- Requesters have a fixed spending limit set by their departments that “pre-approves” them to spend up to that amount without additional organizational financial approvals.
- Requester0 - $0
- Requester1 - $250
- Requester2 - $1000
- Requester3 - $2500

**Approvals (financial)**
- If PR is LESS than Requester’s spending limit:
- Additional financial approvals required for PRs $10,000 or more (Dean level approval) and $100,000 or more (Sr. VP approval)
- PR is MORE than spending limit:
- Organizational approval is required for PRs more than the Requester’s spending limit

**Approvals (category)**
- OEHS approval for chemical purchases.
- IT Governance approval for non-standard technology purchases.
- Other category approvals may apply.

**Approvals (Purchasing)**
- Only some PRs require category approval: chemicals, drugs, computers. More may be added.
- Materials Management reviews ALL non-catalog PRs regardless of amount

**Purchase Order**
- Purchase Order generated and issued to Supplier.
- Materials Management reviews ALL non-catalog PRs, regardless of the amount
More on Shoppers

- Shoppers can be anyone with a “tulane.edu” address
- Shoppers CANNOT fully complete a Purchase Requisition
  - Shoppers must assign the cart to a Requester for completion and submission
  - Shoppers CAN complete the shipping info of the draft PR (but are not required to)
  - Shoppers CANNOT complete the accounting info
  - Shoppers CAN change PR “Receipt Required” setting
- Shoppers can assign a cart to anyone in with an eProcurement account, including other Shoppers
  - Why do this? Example: assist colleagues in finding items to purchase
  - The final Shopper must still assign the cart to a Requester to complete and submit the PR
  - Unless it is changed, the first shopper will be the one associated with the purchase
  - Search for assignees using Tulane user name
More on **Requesters**

- A user is assigned a Requester role based on TAMS requisition settings, though orgs may change or add new Requesters at any time.
- Requester access to accounts may be by account or by entire organization.
- Requesters can only submit PRs using accounts they are authorized to spend from, as configured in TAMS.
- All new SoM requesters default to Requester0 (approval required for any amount); all others default to Requester2 ($1,000 spending limit) unless requested otherwise (write to [SciQuest.Support@tulane.edu](mailto:SciQuest.Support@tulane.edu)).
- Requesters will receive eProcurement notifications to create receipts acknowledging successfully delivery of goods & services.
  - All purchases more than $2500 REQUIRE a receiving report; optional for less than $2500.
  - Supplier invoices will not be paid until required receiving reports are completed.
More on Approvers

- Though organizations may designate their Approvers, default is based on existing TAMS requisition hierarchy
- Organizations may have (and are encouraged to have) multiple Approvers
- An Approver may be, but does not have to be, also a Shopper and/or a Requester
- An Approver cannot approve a requisition that he or she originated as a Shopper or submitted into workflow as a Requester
- Approvers may temporarily designate a substitute (for vacation or other absences) but substitute must ALREADY be an Approver in a different organization.
More on Check Requests

• eProcurement Check Request for invoice payment has replaced Concur Checks
  • Concur can only be used for travel reimbursements and other allowable reimbursements to Tulane employees
  • Reimbursement and personal payments (honoraria, etc.) to non-Tulane employees is still by Check Request

• Check’s may only be used to pay for certain categories of goods and services.
  • Only goods and services that are included in the allowable Natural Accounts list may be paid via check request
  • Most other purchase requisitions should be done as a purchase order (eProcurement catalog and non-catalog requests)

allowable Natural Accounts list
More on Blanket / Service Orders

- A Blanket/Service Order can be set up for an entire budget year or grant year
  - Blanket POs for general ledger accounts cannot extend beyond the current fiscal year
  - Blanket POs for grants may extend for the entire grant period, regardless of the fiscal year
- An upper spending amount is set and future invoices are paid against that budgeted limit
- Use for regularly ordered or billed items, like consumable supplies or regular service activities
- Blanket/Service Orders CANNOT be used for Catalog Suppliers – with the exception of Airgas
- Suppliers are instructed to send Invoices directly to Accounts Payable
  - Blanket Orders with total amount more than $2500 will REQUIRE invoice approval for each invoice – notice will be sent to the Requester
  - For blanket POs less than $2500, Requester may OPT to review and approve invoices (must designate at the time the blanket PO is created)
Important Links:

Materials Management (Purchasing)

https://procure.tulane.edu
Link to eProcurement and useful materials

Tulane Service catalog:

http://tulane.service-now.com/ess
TAMS account changes
Important Contacts:

Tulane eProcurement Support:  
SciQuest.Support@tulane.edu  
504-865-5211

Tulane Accounts Payable:  
lleblanc@tulane.edu  
504-865-5824  
Questions about SciQuest check requests