

Tulane University eProcurement

POWERED BY
JAGGAER *

* FORMERLY
SCIQUEST

Updated 2018-08-02

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



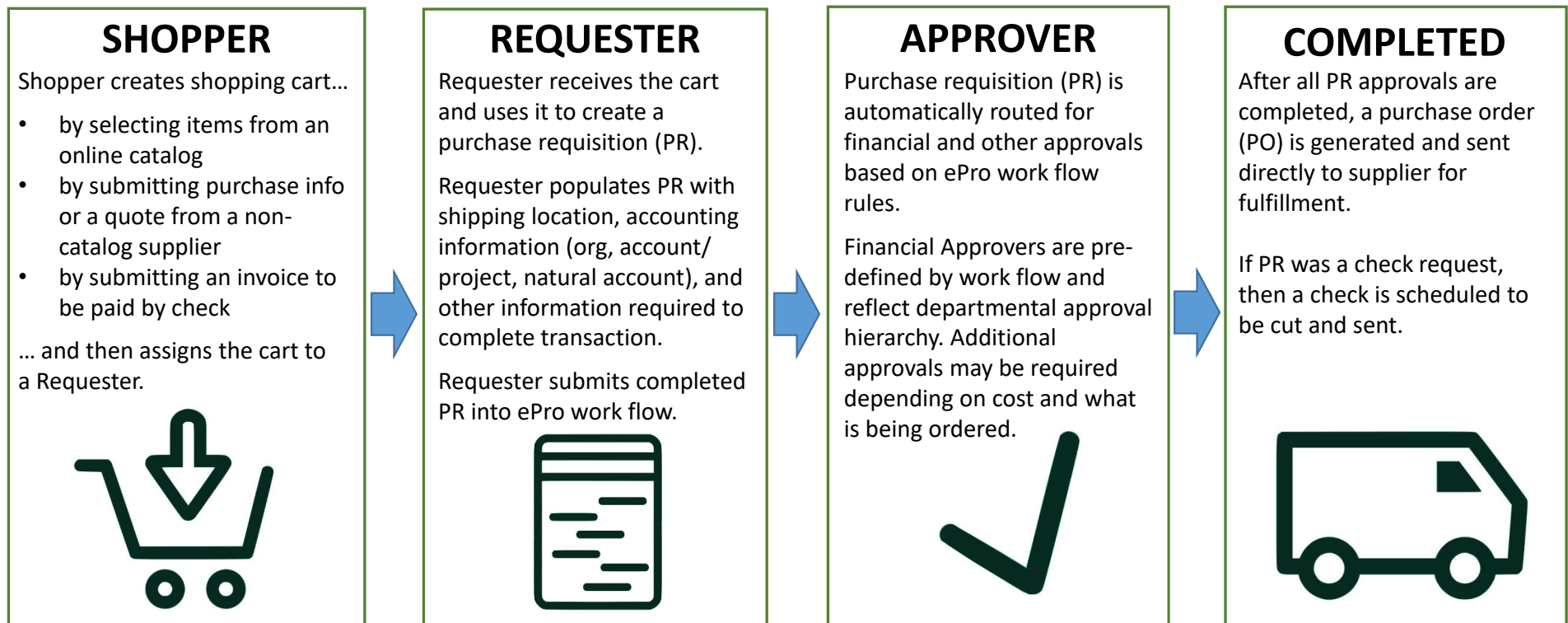
Although the terms are often used interchangeably...

- *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



Jaggaer eProcurement works with TAMS
TAMS is still the underlying accounting system

Interface
visible
to users

eProcurement
JAGGAER 

Underlying
accounting
system

TAMS

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

Requester Level	Spending Limit
Requester0	\$0
Requester1	\$250
Requester2	\$1000
Requester3	\$2500

LESS THAN spending limit

Requisitions LESS THAN the spending limit DO NOT require org approval

MORE THAN spending limit

Requisitions MORE THAN the spending limit DO require org approval

- 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

Log in to eProcurement!

Use eProcurement Test for this Workshop

<http://tinyURL.com/SQtest100>

Navigation Menu

Breadcrumb Navigation

User Information

Action Items

Cart Summary

- Home
- Shop
- Documents
- Contracts
- Accounts Payable
- Reporting

Shopping Shortcut

Paul Tulane ★ 🔔 🛒 0.00 USD

Shop Everything Go

Document Shortcut

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#) Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)

CATALOGS

Punch-Out Catalogs
Hosted Catalog
Contract Supplies

This site provides a familiar online shopping experience and negotiated pricing from Tulane University's preferred suppliers.

http://matgmt.tulane.edu/policies_and_procedures_toc.html

▼ Catalog Suppliers ?

▼ Contract Suppliers ?

--	--	--

▼ Non-Catalog and Payment Requests ?

Non-Catalog Supplies	Check Request	Blanket/ Service Order
--------------------------------------	-------------------------------	--

▼ Special Requests ?

PO Change Order Request	New Supplier/ Update Supplier Re...	Tulane Controlled Substance Orde...
---	---	---

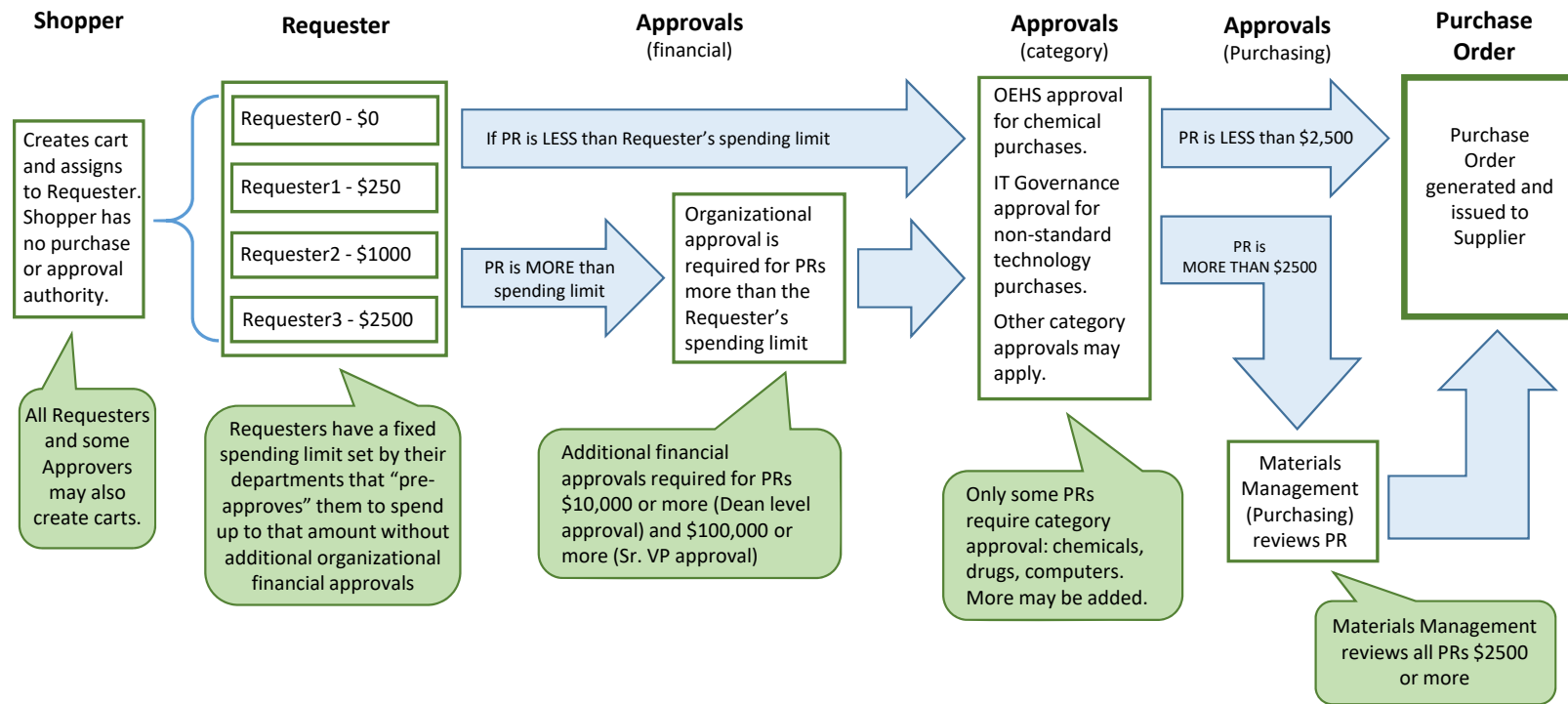
Non-Catalog Item

Utility Functions

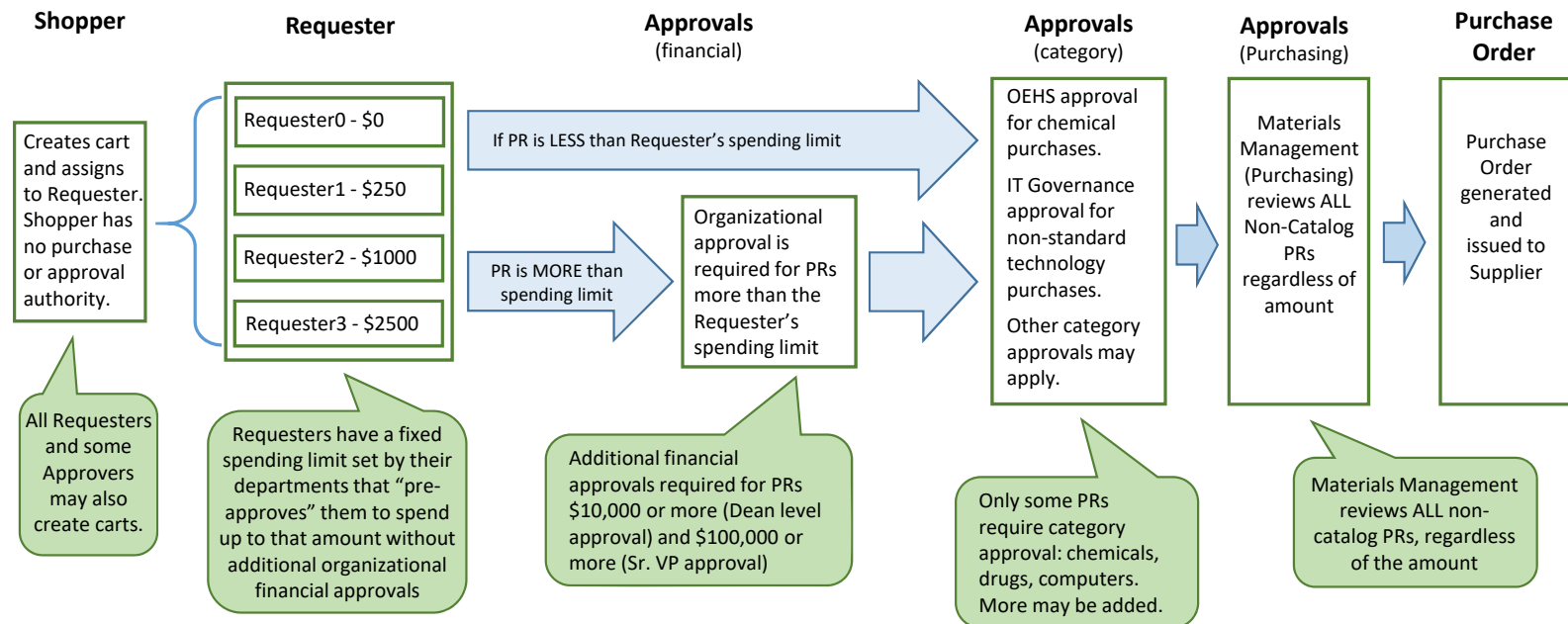
Menu Search (Alt+M)

Let's Get Started!

Catalog Supplies Purchase Workflow



Non-Catalog Supplies Purchase Workflow



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)
- 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)

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