Tulane University
SciQuest

Module 2: Cart Creation
Training User Guides
2.0 Searching for Items and Filtering Results

Target Audience: Shopper/Requester

1. Once logged into SciQuest, users can shop for items using two methods. Users can click the Shopping Cart icon and search for a product in the search field OR users can use the Shop at the Top shortcut on the Shopping Homepage to search for products. Products can be searched by a keyword, catalog number, or CAS number. Search for a product and Click the magnifying glass or GO button.

2. Results will be populated with the ability to filter products by product flag, supplier, category, supplier class, packaging UOM, etc.
2.1 Comparing Catalog Product Results

Target Audience: Shopper/Requester

Multiple catalog items can be selected for side-by-side viewing to compare item details to help make well-informed decisions.

1. Within the search results, select the Compare link listed below the unit of measure for items that are being compared.

2. A check mark will appear next to icons that are being compared. After selecting multiple items for comparison, select the Compare Selected button in the top right corner.

3. Selected product specification comparisons will appear adjacent to one another.
2.2 Search by Supplier/Shop by Supplier

Target Audience: Shopper/Requester

1. In addition to searching for products, users can also browse SciQuest by suppliers by accessing the browse by Supplier link on the home page OR by using the Shopping Cart in the left hand navigation menu.

2. A comprehensive list of suppliers will appear and users can filter based on hosted catalog, punch-out supplier, etc. Expand the search filter on the Browse by Supplier page to view the supplier filter.

3. Users can search for suppliers by supplier name and/or supplier type. Select the Supplier Type dropdown box to perform a more specific search. After entering the supplier criteria, select the Search icon.

4. Supplier results will appear along with icons describing the supplier type and supplier preference. To see an icon definition, hover the mouse over that icon. By clicking on the supplier name from the initial search results page, a summary of the supplier will be displayed.

5. To access a supplier’s punchout catalog from the search results, select the icon.
5. To shop by supplier, access the **Advanced Search** link on the home page OR from the **Advanced Search** link in the left hand **Shopping Cart** navigation menu.

6. From the **Advanced Search** page, enter the desired supplier Name and click the Search button. **Suppliers**

7. Search results for the supplier will appear.

8. Suppliers are classified with descriptive icons. Hover mouse over an icon to see description. Complete legend of icon descriptions below.

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2.3 Creating Shopping Carts from Punch-out Catalog

Target Audience: Shopper/Requester

Users can create shopping charts from supplier **punch-out catalogs**. A punch-out catalog is a catalog that resides in the supplier’s website. When users shop using a punch-out catalog, they are directed to the supplier’s catalog to fill up a cart and then return it to SciQuest for processing.

1. From the **Shopping Homepage**, click the **Cart** icon and search for a product in the search field. Products can be searched by a keyword, catalog number, or CAS number.

2. Search results will be displayed and product details can be accessed by clicking on the product description.

3. A pop up screen will present product and supplier details.

4. Return to the search results screen and select the option to **Order from Supplier**. The webpage will be redirected to the supplier’s punch-out page.
5. You will be redirected to the supplier’s punch-out site and will be able to add products to the Cart. Add a product to the Cart by selecting the Add to Cart icon.

6. Once the item is added to the Cart, Checkout and then Submit Order - note that each catalog will be different but workflow will be similar.

7. After the order has been submitted on the supplier’s punch-out site, you will be redirected to SciQuest. The order will now appear in your SciQuest cart. (Save this cart now for use in subsequent training modules: UserName_Punchout Supplier Cart, then select Update button.)

8. Users can also add products to a cart from the Shopping Homepage (icon), search for a product or choose one of the catalog suppliers. For this module, we will search via supplier.
9. Choose a catalog supplier and click the tile icon to be directed to the supplier’s online punch-out catalog.

10. Users will be redirected to the supplier’s SciQuest portal to shop as normal. Products can be added to the shopping cart from the punch-out site. Follow steps 5-7 from this module to add items to your SciQuest cart.

2.4 Canceling punch-out Sessions
Target Audience: Shopper/Requester

1. To cancel a punch-out session, select the Cancel punch-out icon at the top right hand corner of the Supplier punch-out screen. You will be redirected to the SciQuest shopping homepage.
2.5 Creating Favorites
Target Audience: Shopper/Requester

Users can store frequently ordered and preferred items for fast retrieval and requisitioning. Within SciQuest, there are two types of favorites items: Personal Favorites and Organization Favorites. Personal favorites are those that an individual identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders. Organization favorites and folders are defined by site administrators.

1. After searching for and identifying the desired item in SciQuest (not from a catalog punch-out), click the Add Favorite link to select the item as a favorite.

2. Within the Add Favorite dialogue box under Step 1: Edit Item Details, enter an item nickname, quantity and item description for the selected item. Proceed to Step 2: Select Destination Folder and select the Add New link.

3. From the Add New dropdown menu, select Top level personal folder.

4. Enter a Name and Description for your Favorites folder and select Save Changes.
5. To purchase items from your Favorites list, return to SciQuest home page ( ), and select Favorites.

6. To add one or more items to the cart, Edit the value in a product’s Quantity field as necessary (to select a quantity other than the product’s default value). Click the product’s Select checkbox. Note: this also works to select and add multiple items.

7. After selecting products to be added to the cart, select the Actions for Selected Favorites dropdown box and select Add to Cart. Save your cart as UserName_Supplier_Favorites.

7. Navigate to your Shopping Cart Summary to view newly added items.
2.6 Create Shopping Carts from Favorites
Target Audience: Shopper/Requester

The Favorites functionality allows individuals and organizations to store items that are referenced or ordered on a regular basis. Both options are controlled by permissions. Once items are saved to Favorites they can be added to a shopping cart.

1. Favorites can be added to a shopping cart by selecting the Favorites link from the home page OR by accessing the View Favorite link from the Shopping navigation menu.

2. From the Favorites page, Select the Favorites folder with the products that should be added to your cart.

2.7 Creating Shopping Carts from Hosted Catalogs
Target Audience: Shopper/Requester

Users can create shopping carts by selecting items from a supplier **hosted catalog**. A hosted catalog is a version of the supplier’s on-line catalog hosted in SciQuest. Unlike the punch-out catalog, a hosted catalog does not redirect users to the supplier’s external website. When a product search is performed in SciQuest, the products in all of the hosted catalogs are searched.

BD Biosciences and Apple Computers are a few examples of suppliers with hosted catalog capabilities. Refer to Step 2.2 - Search by Suppliers - to identify more suppliers with hosted catalog capabilities.

1. From the Shopping Home page select the link **Advanced Search**.

2. The advanced search screen will appear. In the supplier field, enter the name of the supplier with hosted catalog capabilities and click **Search**.
3. From the search results, edit the quantity of items to be ordered and select the Add to Cart button.

4. Once the items have been added to your cart, a green Success dialogue box will appear, the Cart Summary in the upper right hand corner will update and a note below the Add to Cart button will update as well.

5. To save your current cart, click the cart summary Icon in the upper right hand corner.

6. Select the View My Cart button.

7. In the Name this Cart field, enter UserName_Hosted Supplier Cart as the cart's name and select Update.
2.8 Assign Shopping Cart to Requestor

Target Audience: Shopper/Requester

You have the opportunity to assign a Shopping Cart to another user. This option is relevant to a Shopper role, as they can assign their draft cart to a department Requestor to fill in the accounting information. Assigning a cart is also useful to aggregate multiple items for different users, while still consolidating the request to one order.

1. Click the Shopping Cart icon and choose the My Carts and Orders option. To option an existing cart, select the View Draft Shopping Carts.

2. All draft carts will appear, select the desired cart for editing by clicking the Favorites Shopping Cart.

3. Once the active shopping cart is open, click the Assign Cart icon in the top right hand corner.

4. Clicking the Assign Cart button allows the user to search the Tulane directory for their Requestor, add them to their profile to expedite future efforts, and add a note to the assignee which will be delivered to their email via a system notification. You can assign carts by Selecting Profile Values or by Searching for an Assignee. To select a person based on Profile Values, select the Select the profile value option button.
5. To search for an assignee, choose the option button “Search for an assignee” and click the link entitled “Search for an assignee.”

6. At the User Search screen, type in the information of the Requestor that is being assigned the cart and hit Search.

7. Choose the appropriate person and click Select.

8. After selecting the assignee, click the Assign button.

9. Once the assignee has been chosen, you will receive a confirmation that the cart has been assigned.
2.9 Unassign Shopping Cart to Requestor
Target Audience: Shopper/Requester

1. After logging in, click the Shopping Cart icon in the left menu panel, navigate to My Carts and Orders and select Open My Active Shopping Cart.

2. Below your drafts, there will be another section entitled “My Draft Assigned to Others”. If you want to unassign that requestor, select the Unassign button.

3. The requestor will no longer be assigned that cart and will not be notified of the change. The assigned cart will now return to the Shopper’s personal shopping cart and the Shopper should communicate the changes with the Requestor.
2.10 Creating Shopping Carts from Quick Orders
Target Audience: Shopper/Requester

Quick Order allows you to order one or more products simultaneously. Both the supplier and manufacturer part numbers are searched when using Quick Order. If the catalog number entered is an exact match to a product in the hosted catalogs, and there is only one match, the product is automatically added to the shopping cart. If an exact match is not found or more than one product is found, search results are presented to allow for the selection of the appropriate product. Note: Quick orders are only accessible via Hosted Catalogs.

1. To enable quick orders, it is recommended that users use the supplier part number rather than manufacturer number. To access quick orders, users can select the Quick Order option by selecting the browse by Quick Order link on the home page OR by selecting the Quick Order option in the Shopping tab of the navigation menu.

2. For this example, Supplier part numbers 560285 and 560289 will be used. Once SKUs are entered, select the Add to Active Cart icon.

3. An add to cart confirmation will appear and the cart summary in the top right hand corner should reflect the items selected.
2.11 Creating Shopping Carts from Non-Catalog Items

Target Audience: Shopper/Requester

Non-Catalog Requests are intended to address purchasing needs that fall outside of typical requests for goods and/or contract enabled supplier items.

Building a Non-Catalog request will not require navigation outside of the Tulane SciQuest environment. Prior to beginning a Non-Catalog Request, ensure your cart contents are empty. Non-Catalog Requests follow a different approval route and cannot be mixed with other order types (e.g. Punchout items, Catalog Items, Form items).

Once you have completed a Non-Catalog Request, you will add the items to your cart, navigate to the draft cart and follow a standard checkout process.

1. From the Shopping home page, click the Non-Catalog Item link located in the “Go To” menu. It appears directly under the search bar.

2. The Non-Catalog link opens a separate order form which includes required fields for Non-Catalog item information.

3. Enter Supplier is a search-enabled field which queries the entire supplier directory. If you cannot locate your supplier, a new supplier request may be necessary.

4. Complete each of the required fields (indicated in bold) with the appropriate information. Included are: Product, Description, Catalog No., Product Size, Quantity, Price Estimate, and UOM. Adding the commodity code is optional, but beneficial.

5. Additional line items can be added by using the Save and Add Another button located at the bottom of the Non-Catalog Request form.

6. Once all necessary information has been entered, click Save and Close. This will deposit your non-catalog line items into your cart. Navigate to the cart and save it as UserName NonCatalog Item Cart.

7. Proceed to your cart to begin the checkout process by clicking the cart icon located in the top right menu.
2.12 Creating Shopping Carts from Blanket Services/Order

Target Audience: Shopper/Requester

Blanket orders should be made for intangible items only such as services, repairs, maintenance and leasing. Blanket orders should be completed using the Blanket Service/Order from in SciQuest.

1. From the Shopping Homepage, select the Blanket Service/Order icon in the Non-Catalog and Payment Requests section.

2. The Blanket Service/Order form will appear. Read the instructions carefully and complete the form ensuring all required fields are filled in. Required fields are in bold including the Supplier Name, Product Description, Quantity, Blanket Order Start and End Dates.

3. If there are attachments for this order, add the attachments and select the appropriate checkbox that corresponds with the attachment.

4. If a new supplier is required, complete the New Supplier Information at the bottom of the form.

5. Once the form is completed, select Add to New Cart from the Available Actions drop down menu. Navigate to the Shopping Cart drafts and save the shopping cart as UserName_NonCatalog Item Cart.

6. Proceed to your cart to begin the checkout process by clicking the cart icon located in the top right menu.
2.13 Creating Shopping Carts from Check Request
Target Audience: Shopper/Requester

Check requests should be submitted for services that do not require a purchase order. All check requests must be accompanied by an invoice upon submission.

1. From the Shopping Homepage, select the Check Request icon in the Non-Catalog and Payment Requests section.

2. The Check Request form will appear. Read the instructions carefully and complete the form ensuring all required fields are filled in. Required fields are in bold including the Supplier Invoice #, Invoice Date, Invoice Attachment, Handling Code, Remittance Message, Phone Number, Internal Payment, Supplier Information, etc.

3. Complete all required fields and attached all supporting documentation.

4. Once the form is completed, select Add to New Cart from the Available Actions drop down menu. Navigate to the Shopping Cart drafts and save the shopping cart as UserName_Check Request Cart.

3. Proceed to your cart to begin the checkout process by clicking the cart icon located in the top right menu.
2.14 Submitting a Change Order Request
Target Audience: Shopper/Requester

A Change Order should be submitted to request changes for purchase orders. These changes may include canceling lines, increasing amounts, and changing indexes. Accounting code changes consider previous invoice activity, complexity of accounting code on the original purchase order, and the impact of issuing a new purchase order.

1. From the Shopping Homepage, select the PO Change Order Request icon in the Special Requests section.

2. The Change Order form will appear. Read the instructions carefully and complete the form ensuring all required fields are filled in. Required fields are in bold including the First Name, Last Name, Department, Email Address, Telephone Number, PO Number, Type of Change, Details of Change, Supplier and Fulfillment Address.

3. Select Type of Change from the dropdown menu. Options include: Change Chartfield Only, Decrease Amount, Increase Amount, or Multiple Changes. This drop down menu allows the workflow to properly route the change order request.

4. Select the Commodity Code consistent with the original purchase order. This ensures the appropriate Procurement representative will receive the request.

5. Once all necessary fields have been completed, Navigate to the Available Actions drop down menu, select Add and Go to Shopping Cart. This will deposit you change order request into a draft cart. Please note: If other miscellaneous items are already in your cart (e.g. punchout items, Non-Catalog Request, Catalog Order,), you will receive an error message.

6. From the Available Actions, select Add to New Cart. Navigate to the Shopping Cart drafts and save the shopping cart as UserName_Change Order Request.
2.15 Submit a New Supplier/Update Request
Target Audience: Shopper/Requester

Suppliers must be setup prior to submitting a request. Please ensure you allow sufficient time for supplier onboarding to occur. This applies for both traditional requisitions and check requests.

1. From the Shopping Homepage, select the New Supplier/Update Supplier Request icon in the Special Requests section.

2. The New Supplier/Update Supplier Request form will appear. Read the instructions carefully and complete the form ensuring all required fields are filled in. Identify whether or not you will be updating an existing supplier and request a new supplier. Then complete the Supplier Contact Information to your best ability.

3. Complete all required fields and attached all supporting documentation.

4. From the Available Actions, select Add to New Cart.

3. You will redirected to your Shopping Cart. Save the shopping cart as UserName>New Supplier Request.