Tulane University
SciQuest
Module 3: Requisition Creation
Training User Guides
3.0 Modifying Draft Shopping Carts
Target Audience: Shopper/Requester

1. Once logged into SciQuest, click the Shopping Cart icon in the left
hand navigation bar, select My Carts and Orders, and View Draft
Shopping Carts.

2. Your draft carts will appear as a list. Click the link of the Shopping
Cart Name that you want to edit.

3. To remove items from your draft cart, navigate to the desired products
and select the Remove icon.

4. The product will be removed the cart and additional edits can be
made. To modify quantities, change the quantity and click Update.
5. To resume shopping, click the *Continue Shopping* link to return to the Shopping Homepage.

3.1 Creating New Shopping Carts by Copying Requisitions

**Target Audience:** Shopper/Requester

1. Once logged into SciQuest, click the *Shopping Cart* icon in the left hand navigation bar, select *Document Search*, and *Search*.

2. From the search drop down box, choose *Requisitions*. Users can enter specific search criteria in the text box and also filter by date. If requisition details are unavailable, leave the text boxes blank and select the *Go* button to search all former requisitions.
3. Requisition results will be displayed. If desired, users can filter requisition results using the filter criteria in the Search Details pane. For this training, we will select one of the requisition numbers.

4. From the Requisition summary page, select the Document Actions dropdown box.

5. Select the Copy to New Cart option to create a new option.

6. A new cart will be created with the items purchased from the previous requisition. Enter a shopping cart name for this cart and click Update.
3.2 Adding Items to an Assigned Shopping Cart  
Target Audience: Requester

1. Click the **Shopping Cart** icon in the left hand navigation bar, select **My Carts and Orders**, and **View Draft Shopping Carts**.

2. **Select** the shopping cart draft that is assigned to another user.

3. From the shopping cart webpage, click the **Continue Shopping** link to add additional products to the cart.

4. You will be redirected to the Shopping Homepage, from there continue shopping by searching for an additional item and click **Go**.

5. From the search results, choose the desired item and click **Add to Cart**.
6. Click the Cart Summary in the top right hand corner of SciQuest to review the active cart.

7. A summary of the active cart will appear. To view the cart in greater details, select View My Cart.

8. The details of your shopping cart will be displayed.

3.3 Consolidating Assigned Shopping Carts
Target Audience: Shopper/Requester

Users can combine multiple carts into one draft cart or you may create a new one for consolidating. Users will need at least two draft carts to consolidate shopping carts. Note: The system won’t allow adding lines from one assigned cart to another assigned cart. Users should create a new cart for consolidating.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and View Draft Shopping Carts.

2. Select the Create Cart icon, in the Name this Cart text box enter “Master Consolidated Cart” and click Update. Return to the draft shopping carts screen.
3. Return to the Draft Shopping Carts page by selecting the Open My Active Shopping Cart breadcrumb navigation menu and select View Draft Shopping Carts.

4. Open each cart to be consolidated by clicking your Hosted Supplier Cart 2. For this tutorial, start with the your first draft cart.

5. Check the box of the line item you would like to copy into the master cart, or check the Select All box to copy all the lines beneath it. Click the line at the top “Perform an Action for Selected Lines” and then click on Add to Draft Cart.

6. The system will display a list of available draft carts or pending purchasing requisitions. Select the Master Consolidated Cart from Step 2 and select Move. A success dialogue box will appear and the existing cart will be emptied.

7. Return to the Draft Shopping Carts page. The cart that was copied in Step 5 should now be empty and reflect zero. Complete steps 3-5 for your Hosted Supplier Cart 2.
7. Both assigned carts should now be empty. Contents of the assigned draft carts should be transferred into your **Master Consolidated Cart**. If desired, users can delete the two remaining unused carts.

8. To review the Master Consolidated Cart, **Select** the name of the cart to review and ensure the two shopping carts have been consolidated.
3.4 Editing Assigned Shopping Carts  
Target Audience: Requester

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and View Draft Shopping Carts.

2. Select the Assigned Shopping Cart that needs to be edited.

3. The details of the shopping cart will appear and users can edit the shopping cart. The following edits can be made from this page:
   - 1: Product Quantity Update - Change the quantity of the selected item.
   - 2: Remove Item - Delete the item from the current cart.
   - 3: More Actions
     - Move to Another Cart, Add to Draft or Pending PO, Add to PO Revision, Line Item History
3.5 Proceeding to Checkout  
Target Audience: Shopper/Requester  

SciQuest allows users to submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process. The checkout process is accomplished through the carts navigation tab.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart.

2. From your shopping cart, click the Proceed to Checkout.

3. In a requisition, various details such as shipping/billing address, accounting codes, and commodity codes are associated with each line item. When populating a cart, the default values from the user’s profile are used. If all details are completed, the order is ready to be placed. Requesters will be able to select Place Order button to submit the cart to begin the approval process. Place Order functionality will only be available to requesters. Shoppers will have the ability to Assign Carts.

4. A confirmation page will appear showing next steps.
### 3.6 Withdrawing Requisitions from Workflow

**Target Audience:** Requester

Users are able to withdraw requisitions after they have been submitted and in the workflow queue.

1. Select **documents** from the documents icon tab in the navigation menu and the select **Search Documents**.

2. From the document search page, select the **My Requisitions** link.

3. Choose the requisition that you would like to withdraw and select the **requisition number**.

4. Under the **Document Actions** dropdown menu, select the **Withdraw Entire Requisition**.
3.7 Splitting Accounting Charges
Target Audience: Shopper/Requester

Accounting codes can be split to distribute a requisition’s amount across multiple funding sources. Splits can accommodate a % of price, or % of quantity and is applied to all lines in the cart.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart. Open your Master Consolidated Cart.

2. Select the Proceed to Checkout button.

3. A final administrative review of the order is available for users to edit various details relating to the order. In the Requisition panel on the left side of the screen, users can edit those details. To edit accounting codes, select Account Codes option in the Requisition menu and then select Edit.
5. To split the accounting codes, enter the desired accounting codes in the Organization, Account/Project, Natural Account and Department. Use second accounting code fields.

6. After accounting codes are entered, users should assign the value of the accounting code splits. Accounting code splits can be split by percentage of price, percentage of quantity, or amount of price. Those preferences can be accessed by the Add Split drop down box.

7. Enter the Split Amount in the appropriate fields. To calculate designated values select Recalculate/Validate Values. To show monetary calculations, select Show Monetary Calculations. Click Save.
3.8 Adding Shipping and Handling Charges

Target Audience: Requester

In a requisition, taxes and shipping and handling (S&H) charges are associated with each line item. SciQuest uses default values set up in supplier details. User can modify the values - per line item - as needed.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart.

2. Select the Proceed to Checkout button.

3. A final administrative review of the order is available for users to edit various details relating to the order. In the Requisition panel on the left side of the screen, users can edit those details. To edit shipping and handling costs, select Taxes, Shipping & Handling option in the Requisition menu and then select Edit.

4. Users can edit shipping and/or handling charges by selecting the Override option from the dropdown menu.

5. Enter the desired shipping and handling charges and select Save.
3.9 Adding Notes and Attachments
Target Audience: Shopper/Requester

Users can add internal and external notes to the requisition. Users can also include attachments in various formats or links to websites. Internal notes/attachments are not sent on to suppliers; they are available to approvers. External notes/attachments are sent to the supplier.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart.

2. Select the Proceed to Checkout button.

3. A final administrative review of the order is available for users to edit various details relating to the order. In the Requisition panel on the left side of the screen, users can edit those details. To add internal notes and attachments to an approver, select Internal Notes and Attachments and select Edit. Note: To add external notes and attachments to an order for the Supplier, follow the same process using External Notes and Attachments.

4. Enter the desired note and click Save.

5. Internal notes can be added at the line level by selecting Edit in the line level section. Follow Step 4 to enter and save the note.
6. The internal note will appear in the Internal Notes and Attachments section of the page. To add an attachment, select **Add Attachments**.

![Add Attachments](image)

7. Users may add an attachment or link to this portion of the requisition. To add a file, select the File option button, click **Select Files** and upload the desired file. Once the file is uploaded, the status should reflect 100%. Click **Save Changes**.

8. To add a link, select the Link option button, type the desired link and click **Save Changes**.

![Add Attachments](image)
3.10 Adding Comments  
Target Audience: Shopper/Requester

Users can add comments to a requisition to add details about a Requisition or to request information about a Requisition. Users can select who should be notified about the comment addition through an email notification.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart.

2. Select the Proceed to Checkout button.

3. A final administrative review of the order is available for users to edit various details relating to the order. In the Requisition panel on the left side of the screen, users can edit those details. To add a comment, select the Comments option.

4. Users can add comments regarding requisitions, purchase orders, invoices and receipts by selecting the desired document in the drop down menu.
5. After the document is selected for comments, click **Add Comment**.

6. Add the comment to the comment section and click **Add Comment**. Attachments can be added to this section if desired.
3.11 Editing Returned Requisitions
Target Audience: Requester

An Approver has the ability to return the purchase requisition (PR) to the Requestor for any changes/updates that need to be made. When a requisition is returned by the Approver it reverts to a draft shopping cart.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and View Draft Shopping Cart.

2. Within the View Draft Shopping Cart page, navigate to the My Returned Requisition section and select the Shopping Cart Name that should be edited.

3. Users can edit the requisition from the Draft Requisition - Final Review page. Administrative details can be edited and/or changed. Once the requisition is open, it becomes an Active Cart. Users can add items to the cart and submit the cart after changes have been made.
3.12 Previewing Requisition Workflow and Purchase Orders

Target Audience: Requester

Prior to submitting a purchase requisition, users can preview the requisition workflow and purchase orders from the Draft Requisition - Final Review page.

1. Click the Shopping Cart icon in the left hand navigation bar, select My Carts and Orders, and Open My Active Shopping Cart.

2. Select the Proceed to Checkout button.

3. Users can edit the requisition from the Draft Requisition - Final Review page. Administrative details can be edited and/or changed. Once the requisition is open, it becomes an Active Cart. Users can add items to the cart and submit the cart after changes have been made. To preview the requisition workflow select PR Approvals.

4. The requisition workflow will appear displaying all steps within the requisition workflow process.
5. To review details of the purchase order, select **PO Preview**.
3.13 View a Purchase Order
Target Audience: Requester

Users can view previous purchase orders submitted by users.

1. From the left hand navigation menu, select the Documents icon, go to Document Search and Search Documents.

2. From the Document Search page, select the dropdown menu and select the Purchase Orders option and click Go. Additional details such as the PO name and number can be entered to return specific results. Searches can also be refined by using a date filter.

3. Select the purchase order number for viewing.

4. A summary of the purchase order is available for users to review.