Tulane University SciQuest

Quick Reference Guide

1.0 Overview

Tulane SciQuest is a Web based eProcurement platform that transforms several manual procurement processes into a single, unified electronic procurement process. SciQuest is a one stop shop for requisitions, purchase orders, integrated workflows and electronic approvals.

Learning Objectives

- The goal of this reference guide is to reinforce the following training objectives:
  - Learn about the benefits SciQuest will bring to the Procure-to-Pay process
  - Become familiar with Material Management policy and procedure changes
  - Understand SciQuest user interface and functionality
  - Understand and differentiate SciQuest roles and responsibilities
  - Recognize the capabilities and considerations for each role
  - Learn enhanced SciQuest functionality through Frequently Asked Questions

Benefits of SciQuest

- Efficiencies
  - Shopper role eliminates duplicate entry and rework
  - One system to accomplish most procurement and accounts payable activities
- Ease of Use
  - Catalog content available with SciQuest preferred pricing
  - Catalog and non-catalog orders in the same system
- Visibility
  - Online history - all purchasing and payment information in one place
  - Data export capability
  - Insight into purchasing trends across all segments of the institution
- Compliance
  - Automated workflow makes compliance simpler
  - Departments can define their own workflow and compliance elements within institutionally mandated elements

Benefits of SciQuest *(continued)*

- Speed
  - Orders are electronically sent to the supplier as soon as approval steps are complete
  - Orders dispatched to vendors in real-time
- Cost Savings
  - On contract spend
  - Increased spend visibility will lead to better supplier pricing
- Communication
  - Use of internal notes, comments and attachments to others processing the purchase
  - Use of external notes to communicate with suppliers which are enabled to receive such communication

1.2 What's New and Different Overview

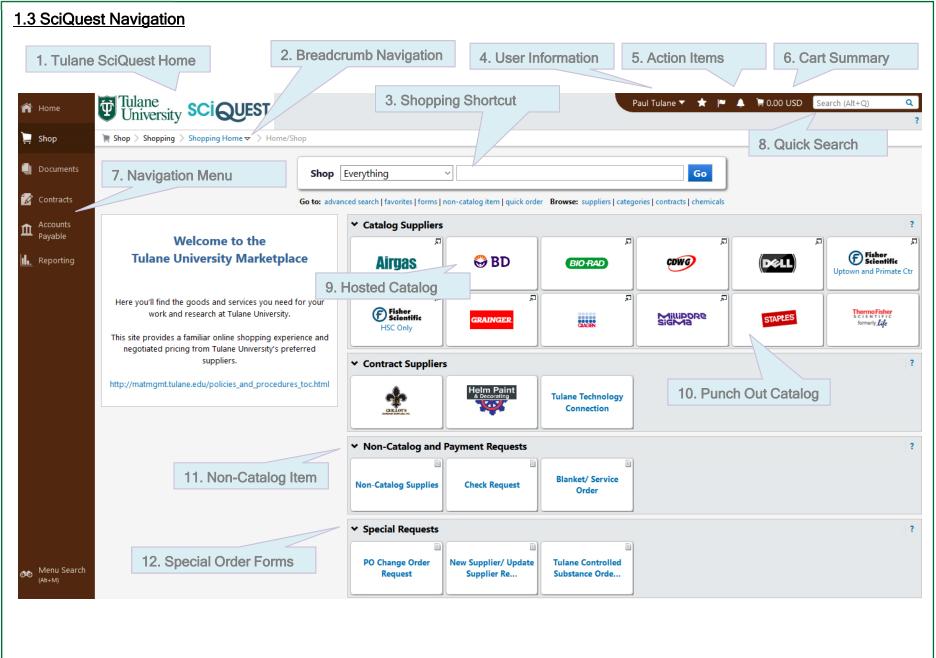| Previous Method |
|---|
| ▪ Purchase goods and services from external Supplier websites |
| ▪ Check requests originated via Concur |
| ▪ Unautomated and manual workflow process |

New Method
▪ Most goods and services will be purchased using Tulane SciQuest eProcurement platform
▪ Check requests will be submitted using SciQuest via Check Request form
▪ Automated and dynamic workflow process

1.3 SciQuest Navigation

1. Tulane SciQuest Home

2. Breadcrumb Navigation

4. User Information

5. Action Items

6. Cart Summary

3. Shopping Shortcut

8. Quick Search

7. Navigation Menu

Paul Tulane

Search (Alt+Q)

Home

Shop

Shop > Shopping > Shopping Home > Home/Shop

Documents

Shop Everything

Go

Contracts

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts | chemicals

Accounts Payable

Reporting

Welcome to the Tulane University Marketplace

Catalog Suppliers

Here you'll find the goods and services you need for your work and research at Tulane University.

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

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

Airgas

BD

BIO-RAD

CDWG

DELL

Fisher Scientific
Uptown and Primate Ctr

9. Hosted Catalog

Fisher Scientific
HSC Only

GRAINGER

QIAGEN

MilliPore Sigma

STAPLES

ThermoFisher SCIENTIFIC formerly life

Contract Suppliers

GUILOT'S

Helm Paint & Decorating

Tulane Technology Connection

10. Punch Out Catalog

Non-Catalog and Payment Requests

11. Non-Catalog Item

Non-Catalog Supplies

Check Request

Blanket/ Service Order

Special Requests

12. Special Order Forms

PO Change Order Request

New Supplier/ Update Supplier Re...

Tulane Controlled Substance Orde...

Menu Search
(Alt+M)

1. Tulane SciQuest Logo	Takes you back to the home/shop page from anywhere in SciQuest.
2. Breadcrumb Navigation	Breadcrumbs that shows user the navigation path and allows users to navigate pages without using the navigation menu.
3. Shopping Shortcut	Conduct simple and Advanced Searches to search for items and products in SciQuest catalogs.
4. User Information	Displays your user name, a link to your profile, and the logout link.
5. Action Items	Depending on your role (Shopper, Requestor, Approver) items requiring your action will be displayed. Shoppers and Requestors will see a link to recent and completed Carts, Requisitions and Purchase Orders, and a notification if requisitions have been returned for updates/review. Approvers will also have links to the approvals tab and other Approver tasks.
6. Cart Summary	Cart Preview allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart and access the active cart. Clicking on the shopping cart icon will display the item list with basic information such as item image, name, quantity and price. From the cart preview you can remove items, access the active cart and/or proceed to checkout.
7. Navigation Menu	Clicking on one of these tabs takes you to the appropriate screen for the topic or function listed. 1. **Home/Shop** – used for shopping and quick access to other key parts of SciQuest such as favorites and forms. On the left side of the screen, the organization message and action items display. 2. **Favorites** – create and define shared and personal favorites folders and items. Items can be moved and copied between folders; current folders and items can be edited and removed. Note: Favorite items can be also be added through search results and the checkout screens. 3. **Document Search** – search a repository of transactions such as requisitions, purchase orders, and vouchers, through a number of filters and save or export frequently used searches. 4. **Contracts** – search a repository of contracts by contract name, number and/or contract end date with the ability to export results 5. **Accounts Payable** – search and view draft/completed invoices and receipts 6. **Reporting**- search report repository and export reports .
8. Quick Search	The Quick Search feature allows a variety of searches, such as supplier profile, document, user profile, etc., to be performed from anywhere in the application. Click the Go button to quick search. The results are shown in the appropriate search results page.
9. Hosted Catalog	Access hosted catalog that you search, filter, refine and compare items between supplier hosted catalogs.
10. Punch-out Catalog	Access punch-out suppliers who have their own catalog that you access by "punching out" to their site. You then return to SciQuest with your shopped items intact.
11. Non-Catalog Item	This link allows users to enter a requisition using a blank format, including: Production Description, catalog number, quantity, unit price, UOM, and commodity code. Multiple line items supported. Non-catalog requests are intended for requests that would otherwise not be accommodated by punch-out, hosted, or form-based activity.
12. Special Order Forms	The most commonly-accessed SciQuest Forms for blanket orders, non-catalog orders, check request, etc. appear here.

1.4 User Roles

SciQuest access and user responsibilities are granted at the user role level by the system administrator. There are four major user roles offered in SciQuest: Shopper, Requestor, Approver and AP Processor. User roles and access can be viewed by Viewing Your Profile in SciQuest:. Refer to Module 1.8 for instructions on viewing your user role. The user roles are explained in greater details below:

Role	Description
Shopper	- Users can shop for items for any and all items, regardless of dollar amount - Limited access to shopping only - Draft shopping carts must be assigned to a Requestor before they can be submitted to workflow and become a requisition.
Requestor	- Users can shop for items for any and all items, regardless of dollar amount AND submit to workflow for approval - Can also create draft shopping carts, or receives assigned carts from Shoppers - Knows the department's procurement processes - Can edit the draft carts before submitting it into Requisition workflow - Enters the appropriate Chartfield and other essential information - Confirms all Requisition information is accurate, complete and complies with policy and funding requirements Spending Thresholds - Requestor 0: $0 - Requestor 1: $250 - Requestor 2: $1,000 - Requestor 3: $2,500
Approver	- Users can shop for items for any and all items, regardless of dollar amount, submit to workflow for approval, AND approve a requisition - Confirms all Requisition (order) information is accurate, complete and complies with the policy and funding requirements. Approves Requisitions - Can also edit or return / reject requisition, if necessary - Reviews and, if appropriate, approves invoices that fall outside of acceptable PO tolerances that have been escalated by the AP Processor
AP Processor	- Approves vouchers to release payment to the supplier - Qualifies of match exceptions prior to escalating to a Match Exception Approval

1.5 FAQ *(Frequently Asked Questions)*

- **What is SciQuest?** SciQuest is a web based eProcurement platform that provides an all in one solution for procure to pay processes.

- **Who can use SciQuest?** All individuals that have are active employees at Tulane University will be able to access SciQuest using their Tulane credentials. This includes all faculty, staff, and students with either a part time or full time assignment.

- **How do I use SciQuest?** SciQuest has various roles with different responsibilities. Training sessions are offered to provide end users with hands on trainings to the full shopping experience and take advantage of the efficiencies the system can offer.

- **Can I use Oracle or Concur to create check requests and/or purchase orders?** As the University transitions to SciQuest, end users will no longer be able to process check requests or purchase orders in other systems outside of SciQuest.

- **Can I access SciQuest off-campus? Do I need to remote to my computer?** SciQuest is a web-based eProcurement system that can be accessed using the SciQuest link and your University user credentials from any device with web access.

- **What is a showcased supplier?** A showcased supplier is a preferred supplier. Showcased supplier catalogs are accessible directly in SciQuest as either a "punch-out" or "hosted" catalog.

- **What is a punch-out catalog?** A punch-out catalog is a supplier's catalog that resides in the supplier's website. When you shop using a punch-out catalog you are directed to the supplier's catalog to fill up a cart and then bring the information back to SciQuest.

- **What is a hosted catalog?** A hosted catalog is a version of the supplier's on-line catalog hosted in SciQuest.

- **I'm looking for a supplier that is not available in SciQuest. How do I purchase from that supplier?** You can request that the supplier be included in SciQuest by using the form under the heading Special Requests – "New Supplier/Update Supplier Request."

- **Can I order from different suppliers using the same cart?** No, you can not order from different suppliers using one cart. A new cart must be created for each supplier.

- **How do I search for orders?** SciQuest has two (2) ways to search for documents. You can use the magnifying glass located at the upper right hand corner or you can use the document (stacked paper) icon on the left hand side.

- **How do I approve/reject/return a cart/requisition?** As an approver, you have the option to approve, reject or return a requisition. In order to take action, you must first "assign" the request to yourself. Once assigned, you will have the option to approve/reject.

Requisitions

- **Can I cancel a requisition after it has been submitted?** Yes, conduct a document search specifically searching for requisitions and navigate to your requisition. Select 'withdraw' from the available actions drop-down menu. Please note, the requisition may be in the process of being reviewed by an Approver, to limit confusion, it is advised that the Approver be contacted prior to withdrawing the requisition.

- **Can I add multiple accounting codes to one requisition?** Yes, please refer to the user training guide Splitting Accounting Codes.

- **How can I determine where my requisition is within the approval queues?** Access the document search icon, searching specifically for requisitions. Click the desired requisition number, and then 'PR Approvals' tab from the requisition summary page.

- **Can I determine when my requisition was approved and by whom?** Yes, conduct a document search specifically searching for requisitions. Click the desired requisition number, and then 'History' tab from the requisition summary page. Each step of the requisitions history is time/date stamped, including approval history.

- **What is a Non-Catalog request?** A Non-Catalog request is a free form requisition that allows the user to enter in product information including (description, catalog number, quantity, and price). Non-Catalog requests are typically used for service related orders, or unique goods that are not available through punch-out or catalog suppliers.

- **When should I use a form?** Forms have been designed to simplify certain types of requests. Each Form has a description in the header (and by hovering over the form with your mouse) to define proper use.

- **My supplier is not available in the supplier directory, how do I submit a requisition and/or Payment Request Form?** You can request that the supplier be included in SciQuest by using the form under the heading Special Requests – "New Supplier/Update Supplier Request."

Purchase Orders

- **Will I receive notification when my purchase order has been delivered to the supplier?** Yes, a purchase order sent to supplier notification will be emailed to the Requestor after successful transmission of the PO has been achieved.

- **How do I edit the purchase order?** If a requisition has been submitted and a purchase order has been created, any changes to the purchase order must be requested via a change order request.

- **How can I retrieve a copy of the purchase order?** Perform a document search specifically searching for purchase orders. Once the results are shown, click the desired requisition number, and click 'Print Purchase Order' in the available actions drop-down menu. Please note: purchase orders are automatically routed to the supplier, DO NOT print a purchase order to redistribute to the supplier; otherwise you risk order duplication.

- **What are the different methods that a purchase order can be distributed to a supplier?** A purchase order can be distributed via email, fax, cXML (for enabled suppliers), or manually via standard mail. Distribution methods are determined by the supplier contact information and/or requisition specific instructions.

Approvals

- **Can I edit a requisition that has entered my approval queue?** Yes, however, be aware changes to the chartfield information will NOT re-route to departmental approvers that were not included in previous approval levels. If chartfield changes are needed, it is recommended that the requisition be returned, corrected and re-submit to invoke the appropriate departmental approvals.

- **If I am an approver for multiple departments, how do I manage all the incoming requisitions?** Incoming requisitions will be deposited into separate departmental approval folders to allow you to independently review and manage requests coming from different departments. You can further refine your approval queue using the Filter options adjacent to the approval folders.

- **If a requisition has multiple accounting code distributions, but I am the approver for each chartfield, do I have to approve it multiple times?** No, once you have elected to approve the requisition, the system will prompt you to determine if you'd like to automatically approve the requisition in all instances. Please note: If you have elected to participate in multiple levels of approval, you will be tasked with approving the requisition at each level.

- **When and why do I need to "Assign a requisition to myself"?** A requisition can be approved without assigning the requisition. However, assigning a requisition is required when the request needs to be rejected, returned, or placed on hold. The act of assigning the requisition allows you to take ownership of the requisition and prohibit any other approvers from unknowingly approving a requisition that you are reviewing.

- **What is the difference between returning a requisition and rejecting a requisition?** Returning a requisition allows the Requestor to make edits and resubmit the request using the same requisition number. Rejecting a requisition cancels the requests, no further edits are allowed. A rejected requisition can be copied to a new cart, but a new requisition number will be assigned. Rejections should be reserved for inappropriate request for goods and services or budget concerns.

- **Can I place a requisition on hold while I evaluate the applicability and/or collecting additional information for the requests without having to return or reject it?** Yes, a requisition can be placed on hold instead of returning the requisition. Comments can be added directly to the requisition to request clarification and/or support documentation without unnecessarily returning the requisition and re-routing through approvals.

Document Visibility

- **Why can't I see/access a requisition/purchase order/invoice/receiver from my school/college/division?** Document visibility is based on your SciQuest role and your assigned department within your user profile.
  - Shoppers have access to view documents that they participated in (e.g. assigned shopping carts).
  - Requestors have access to view documents they participated with (e.g. submitted requisition), as well as, all department related activity.
  - Approvers have access to view documents they participated with (e.g. approved requisitions), as well as, all department related activity.

Invoice Matching

- **What is the process for invoice matching?** Most invoices are matched by price and quantity - this is a "two-way match." If a three-way match is required, the department that requested and received the order must submit an online receipt.

- The three-way match is established by comparing the following:
  - The receiving report that contains the item(s) description, quantity, and price and that has been signed as received by the end user
  - The purchase order data from SciQuest
  - The invoice from the vendor

- A two-way match is conducted when there is no receiving report. The two-way match is established by comparing the following:
  - The purchase order data from SciQuest
  - The invoice from the vendor

- **How will invoicing and payment be handled when I purchase from SciQuest suppliers?** Most SciQuest punch-out suppliers will submit invoices electronically. The two-way or three-way matches, referenced above, will be executed, and successful matches will automatically trigger payment.