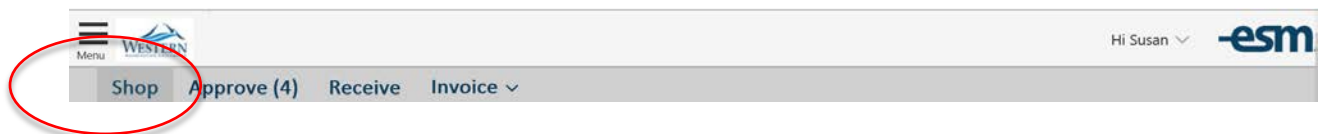


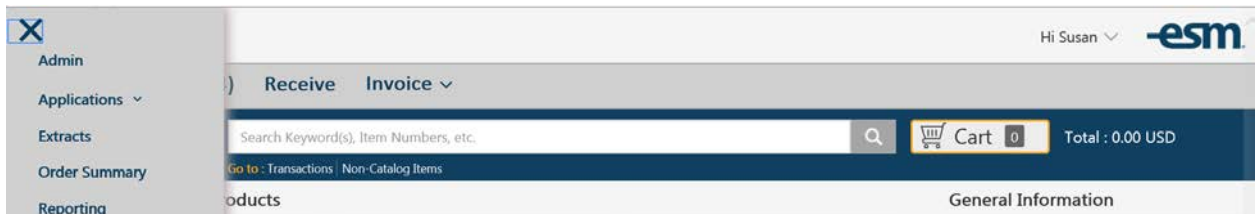
## Quick Reference Guide Catalog Shopping/Approving/Receiving

### Logging On

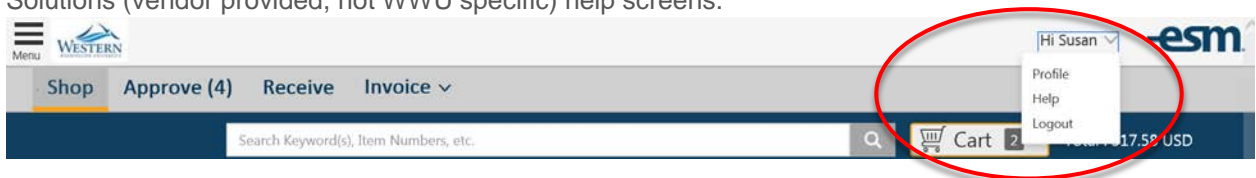
- Log on to My Western. There is a link under Technology Tools and there is a link on the Gateway to eProcurement website under Business Services. This same website has many other helpful things: FAQ's, Return Guidelines and copies of the reference materials which may be viewed online or downloaded. These documents are updated often. <http://www.wvu.edu/bservices/eprocure/index.shtml>
- Ensure your Pop-Up Blockers are turned off or the Marketplace has been set up in your browser as a trusted site. Check with your department IT for guidance on this.
- ATUS recommends that Internet Explorer (IE 11 or above) and for Apple users, Safari for OS X be used. **Edge does not work.**



- Under Menu (the hamburger, top left) there are drop-down menus available for “Extracts” “Order Summary” and “Reporting.”



On the right hand side of the screen under your name you may logout, access your profile where you may assign an approver delegate for any lengthy absences from campus and you may reach the ESM Solutions (vendor provided, not WWU specific) help screens.



### Shop Tab

**Catalog Shopping:** (Consult the Non-Catalog Reference Materials if your vendor does not have a Logo on the Landing page.)

### Search Area



- Searching may not bring up all items that are available for purchase on the Marketplace. It will bring up items from “Hosted” catalogs, and it will bring up items from some punch-out catalogs where the vendor is able to provide advanced search functionality. Not all vendors are able to provide this advanced search functionality. If an item does not come up from this search area, punch-out to the vendor catalog and perform your search.
- When searching from this area, pricing should always be verified by clicking the “Connect” button.



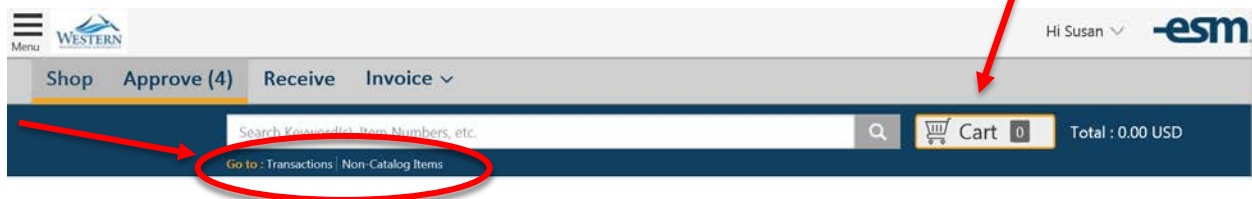
- You may always search by going into each vendor catalog.

## Recently Requested Products

- Recently Requested Products will reflect the last 10 hosted, level 2 punch-out or non-catalog items that were converted to transactions.
- Level 1 punch-out items (example Office Depot) are not displayed in the Recently Requested section since updated pricing needs can't be displayed without accessing the supplier website first.

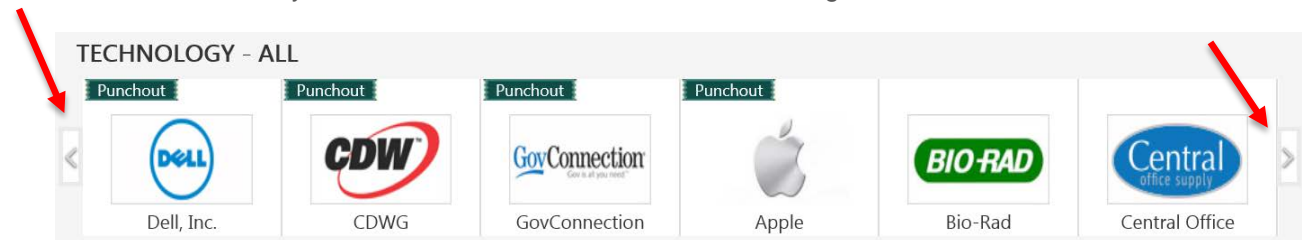
To see your current open transactions by click **Go to: Transactions**.

You may always see the contents your Western Marketplace cart by clicking “Cart.”



## Shopping

- If there are more than six vendor catalogs assigned to a product category an arrow will appear which will allow you to scroll and see the additional catalogs.



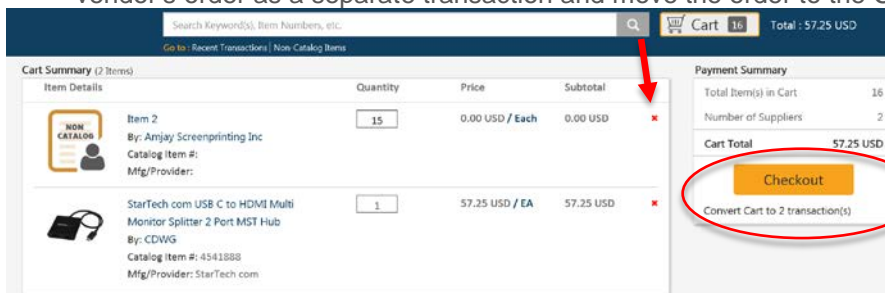
- For catalog shopping, select a vendor (Logo) to access vendor’s website and shop. **A hyperlink below the Vendor logo is for entering non-catalog items.**
- After shopping on the vendor’s website, you will check out from the supplier’s website. This brings your items back into the Western Marketplace cart.

- Each vendor's site uses different check out screens and wording but when you punch-out to the vendor's website through the Marketplace the vendor's check-out or submit process screens should bring your items back to the Western Marketplace cart.
- If you wish to continue shopping, select the shop tab and continue to add items to your cart from other vendors.
- To see items in your cart at any time you may click cart.
- When shopping is complete, **click the checkout button in** the cart Summary area.

### Cart Summary/Transactions



- Once you are in Cart Summary you may add quantities or delete line items in the cart tab. Use the **"Red X"** to delete a line.
- Once you are ready to proceed, Click continue and the system will automatically set up each vendor's order as a separate transaction and move the order to the Checkout area.



### Completing your order in the Marketplace

- In order to complete you order in the Marketplace you will need to update the order type, provide notes or attachments, enter a commodity code and provide information in the Chart of Accounts, GL Acct Code area. These items are in the center area of the screen.
- If you do not know your accounting elements, or need help completing your order, you may forward your order to another person. Go to Next Step Field, select **Forward** from the drop down menu and Hit Forward. You will then enter the name of the person and hit Continue. The order then becomes their order to finish and receive. The person may also send it back to you to request approval after they have assisted in the entries. If this happens, the order will be visible by selecting Recent Transactions. **DO NOT USE THE FORWARD FUNCTION TO HAVE ORDERS APPROVED.**

### Update These Items

Transaction #: 661727

\* Transaction Name: 04/12/2017-08:59-Banton-Commercial Of... [edit](#)

Requester: Susan Banton

Create Date: 4/12/2017

Supplier: Commercial Office Interiors

Total Line Items: 1

Total Value: 368.72 USD

Release Method:

Order Type:

Note to Vendor: [add attachments](#)

Internal Note: [add attachments](#)

\* Ship To - Attn:

\* Commodity Code:  ?

Purchase Order #: 5866

Chart of Accounts:

\* GL Acct. Code:  [details](#)

Selection: Active

Status: Unsubmitted Transaction

System Note: None

Next Step:

- Release method – For catalog orders, and registered non-catalog suppliers, this will default to Electronic. PO’s will be emailed or feed electronically to suppliers. If the release method remains “Manual” then after the PO is approved, a copy of the PO must be sent to the vendor by the requestor or by purchasing.
- Select the correct Order Type, **Note – It is important to select the correct Order type.**
  1. **Catalog – this is the default.** If the supplier is one of the suppliers with logos on the Shop page, and you are not ordering special items, the Order Type is: Catalog.
  2. **Non-Catalog** - You will use this order type when you are using a vendor that is not a catalog vendor. (No Logo on shop page or a furniture vendor with a special quote.)
  3. **EHS** – Use for orders requiring EHS approval before ordering. This is limited to extremely hazardous chemicals.
- Note to Vendor – “Add” “Attachment” – These are two separate functions. For non-catalog orders you may include a note and or attachment. The majority of the catalog order vendors will not see **nor read** any note or attachment because the order is feed electronically into their order system.
- Internal WWU Note – “Add” “Attachment” - These are two separate functions. Provide a short description of the order to your Approver. For non-catalog orders where you select “Add Supplier to the Marketplace” provide information to the buyer about the vendor you wish to use.
- Commodity Code – You may start typing a generic description such as paper, or furniture. Once the item is blue select it. If you hit Update before proceeding this should populate all of the lines of your order. There is also an up-to-date list available in the Quick Reference Tools.(Tip, **Hit Update!**)
- Chart of Accounts/GL Acct. Code or Accounting Segment. You must have a Chart, Fund, Org, Account Code and Program entered. If your favorites are not populated and available in the drop down menu or are not correct (check those “E” account codes carefully) you need to hit “Details” and complete the accounting segment area.
- **Note – You are unable to edit** the accounting segment on the front page header level screen, all entries and updates must be made using “Details” which takes you to another screen.

\* Chart of Accounts: See Item Details

\* GL Acct. Code:

This will bring up the following screen:

\* Chart of Accounts:

Index:

Favorite:

---

**Item Split Detail**

NOTE: Remaining USD / % SPLIT must be 0.00 in order to apply account(s) to transaction.

Delete	Favorite	Chart	Index	Account Code	Description	USD Split	% Split
Remaining:						7500.00	100

---

**Tax Detail**

Chart	Index	Account Code	Description	USD Split	% Split
Remaining:				652.50	100

- **Select > Chart of Account**

Choices are 1, 2 or 3

- **Enter** a FAST Index – You **must start typing** the Index, this is **not** a true drop down, it is a type ahead list. This Index is a short cut for data entry. After the accounting segment elements (aka FOAPAL) appear in the fields below the Fast Index will disappear. The Fast Index is not saved and not available for review.

- The Fast Index will populate:

- Fund
- Organization
- **Account will be LEFT Blank – You will need to complete.**
- Program
- Activity (Optional)
- Location (Optional)

- If you know the account code, place your cursor in the account code area, start typing the E Code, and select the desired account code. This is **not a true drop down**, you must start typing something to bring up a shortened list.

- If you do not know the account code place your cursor in the description area and start typing a general high level description. This is **not a true drop down**, you must start typing something to bring up a shortened list.

\* Chart of Accounts:

Index:

Favorite:

---

\* Fund:

\* Organization:

\* Account:

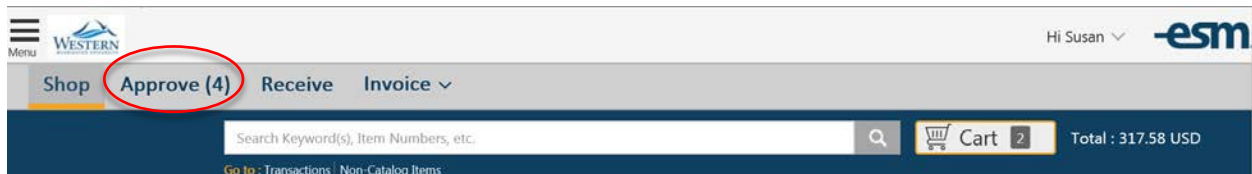
Program:

Activity:

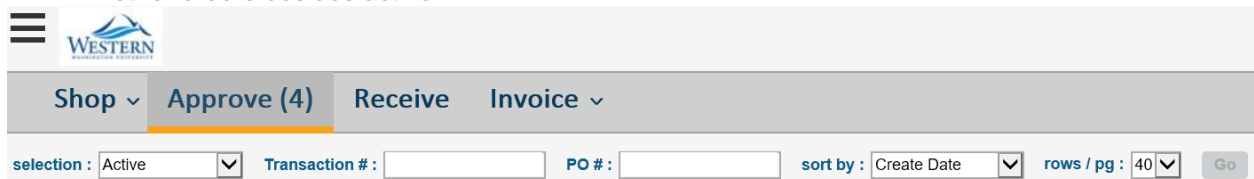
Location:

- Accounts codes will vary depending upon what you are buying and the dollar amount. For definitions of account codes go to <http://www.wvu.edu/fs/as/expenseaccounts.shtml> or check with Accounting Services x 3040.
- You will then need to hit update and then hit Apply. This will take you back to the main order screen.
- When you enter the accounting elements at the Header level of the order you may split the accounting elements by percentages.
- If you need to split by specific dollar amounts you will need to enter the accounting elements on each line.
- After you have selected or completed the Order Type, Commodity Code, Accounting Segment you will need to select "Update." If you do not get a green "Request" Button" you may also have to select **validate** and then Update or Provide Missing Data. Missing Data is usually either a commodity code or the accounting segment is missing.
- **Request approval by selecting the Green "Request" button.**
- Your order is complete and is routing for approval.
- **Tip** – Whenever possible complete items at the header level. This may save you from having to enter repeat information on each individual line. If you have more than one line choose the commodity code and accounting segment that covers the majority of the items. You may later go into detail (**blue triangle**) and make changes on an individual line.
- **Tip #2** – Until you request approval you may continue to make changes. Once you request approval the only way to make changes is to have the order returned to you.

## Approving an Order



- Ensure your selection is made to include active orders. You may also use this tab to filter for other orders besides active.



- In addition to checking if the order is an appropriate purchase, it is important for Approvers to check for **order type, commodity codes and account codes**.
- **After checking for Order type, commodity code and account code and all is OK, select Approve.**
- To see the line detail you need to select the **blue triangle** in the upper left hand corner and click it so it faces downward.

Transaction #: 63172

Transaction Name: 04/03/2017-08:45-Banton-Central Office... [edit](#)

Requester: Susan Banton

Create Date: 4/3/2017

Supplier: Central Office Supply

Total Line Items: 2

Total Value: 20.39 USD

Release Method:

Order Type:

Note To Vendors: [add attachments](#)

Internal WWU Note: [add attachments](#)

Commodity Code: 61500 - Office Su

Purchase Order #: 2498

Work Order #:

Tax Exempt-Y/N:

Ship To - Attn: Susan Banton

Tax: 8.7

Selection: Active

Status: Pending Approval

System Note: [History](#)

Next Step:

- If there are no changes, hit Approve and the order will go through an integration process with Banner. Once a Banner PO # is assigned it will automatically be submitted to the Supplier unless the release method is "Manual." Catalog Vendors will have Electronic Release automatically. (Note: If the release method is manual then the order will be sent back to the originator who will need to ensure a copy of the PO is sent to the Vendor.)

Transaction #: 72081

Transaction Name: 06/27/2017-11:26-Banton-Office Depot ... [edit](#)

Cart Originator: Susan Banton

Requester: Susan Banton

Create Date: 6/27/2017

Approve Arrival Date: 6/27/2017

Supplier: Office Depot (Demo)

Total Line Items: 6

Total Value: 733.21 USD

Release Method:

Order Type:

Note To Vendors: [add attachments](#)

Internal WWU Note: [add attachments](#)

Commodity Code: 61500 - Office Su

Purchase Order #: 2498

Work Order #:

Tax Exempt-Y/N:

Ship To - Attn: Susan Banton

Tax: 8.7

Selection: Active

Status: Pending Approval

System Note: [History](#)

Next Step:

Update

Approve

Hold

Reject

- If you **make changes** to the order, you will not be able to approve the order, you must hit "Update" and then "**Reject.**" The order goes back to the originator. If the approver make changes, explain why in the Notes field so the originator knows why the order was returned.
- Once the approver updates and closes the Note field, the transaction is returned back to the originator. The originator can see the order by clicking transactions. The originator must either update the order, then request approval, or, if all changes were already made by the Approver, request approval. They can also delete the order entirely.

Transaction #: 72081

Transaction Name: 06/27/2017-11:26-Banton-Office Depot ... [edit](#)

Cart Originator: Susan Banton

Requester: Susan Banton

Create Date: 6/27/2017

Approve Arrival Date: 6/27/2017

Supplier: Office Depot (Demo)

Total Line Items: 6

Total Value: 733.21 USD

Release Method:

Order Type:

Note To Vendors: [add attachments](#)

Internal WWU Note: [add attachments](#)

Commodity Code:

Purchase Order #: 2498

Work Order #:

Tax Exempt-Y/N:

Ship To - Attn: Susan Banton

Tax: 8.7

Selection: Active

Status: Pending Approval

System Note: [History](#)

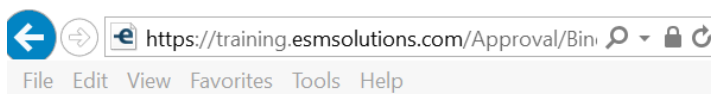
Next Step:

Update

Hold

Reject

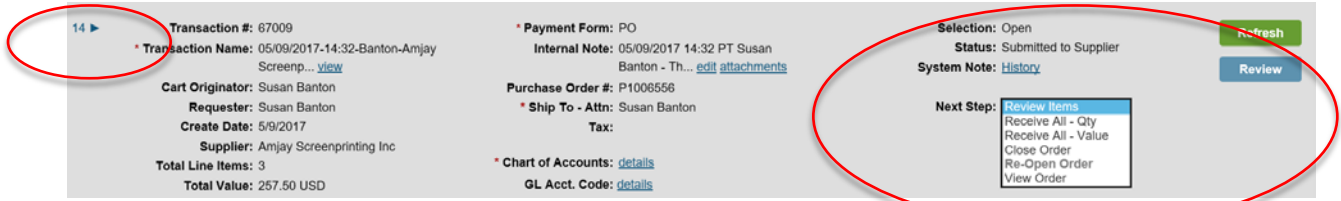
- Tip** – If you click into a field or box and the **Update** button comes up but you do not want to make changes, **do not hit Update**, just refresh (F5) your screen. You may also refresh your browser.



- Once you hit update your "Approve" button will not be available for you to select, your only option will be to **Reject** (return) the order.

## Receiving Online





- Items should be received online in the Marketplace as they arrive in your department.
- Under next step you have several choices. For receiving you may review the line items or receive all.
- Receive All-Qty and Receive all – Value are the same thing, but Value is used for receiving dollar amounts. Receive All – Qty is the preferred choice.
- Second, you may select Review Items or click the blue triangle to open the line item detail. Use this when not all of your items are received at the same time.
- On each line item enter the number of received items and click update. You may also receive a dollar amount.

#### Attaching your Packing slip or Other Documentation:

- **Check with your Department/College or Division if scanning and attaching documents is Optional or Required.** Scan your packing slip and attach as an **internal** attachment. See the Receiving Guide for more detailed information.
- If there is no packing list you may add a note under Internal Note: “Add” – No packing slip was provided.
- **DO NOT CLOSE THE ORDER FOR RECEIVING – AP WILL CLOSE AFTER ATTACHING THE INVOICE.**

#### Small & Attractive or Fixed Assets Account Code

For Small and attractive items, \$0 - \$4,999, use the following codes:

Commodity Code	Description	Account Code	
		If single item cost is under \$1,000	If single item cost is \$1,000 - \$4,999
20400	Laptops, Notebook Computers, Tablets & Smart Phones <b>(NO DESKTOPS)</b>	E407	E409
65500	Cameras, Still Picture (Digital cameras)	E404	E408
84000	Cameras, Motion Picture, (Video Cameras) & Photographic Projection Equipment (Projectors)	E404	E408

Fixed assets, \$5,000 or above, use the following codes:

Commodity Code	Description	Account Code
		If single item cost is \$5,000 or above
20400	Computer Hardware & Peripherals (Desktops, laptops, tablets, monitors, printers)	E412



20600	Computer Hardware & Peripherals for network & enterprise servers	E412
20900	Software for Networked/Enterprise Servers – <b>One Million Dollars and above only</b>	<b>E413</b>
Varies	Any other type of Equipment or system making up one single item \$5,000 & above.	E414
42000 or 42500	Furnishings over \$5,000	E415

For Weapons, use commodity code 68000, and regardless of the cost use the following code:

Commodity Code	Description	Account Code
68000	Firearms, Weapons & Accessories, including ammunition	E408

## Contacts and Information:

### Completing the Marketplace Order/ Order Status/ Questions or where do I buy something?

Call **Business Services/Purchasing at x3340 or x6341**

**Account Codes:** Consult your Department or Division Budget expert or call Diane Hack, Acctg Svcs (x3040.) You may also click here [Expense Codes](#)

- **Commodity codes:** There is a list available online here: [Reference Guides](#)
- **Vendor returns** see: [Vendor Return Policies](#)
- There is a Frequently asked Question Guide available online here : [FAQ's](#)
- If you have questions about **cancelling an order or the status of an order** call the specific Vendor. Many of the vendors have contact information available on their Punch-out catalog sites. You may also email [Purchasing@wwu.edu](mailto:Purchasing@wwu.edu) or call Purchasing at (X3340 or x6341)
- If you have questions about **receiving** online, call or email Purchasing (X3340 or x6341) [Purchasing@wwu.edu](mailto:Purchasing@wwu.edu)
- For **Payment information** on Marketplace orders, call Accounts Payable (X2490) or email [Accounts.Payable@wwu.edu](mailto:Accounts.Payable@wwu.edu)

**System Issues:** Call (x2430) or email WWU ESM support [ESM.support@wwu.edu](mailto:ESM.support@wwu.edu) for the following items:

- Log On Issues/ User Set-up and Roles
- System Alert messages
- No Workflow available or Workflow changes