USER GUIDE
Shop, Checkout, Searching
Contents

Getting Started ........................................................................................................................................ 1
Signing On ........................................................................................................................................ 1
Pop-up Blockers ................................................................................................................................ 2
Contacts ............................................................................................................................................. 2
Navigation Tips .................................................................................................................................. 2
Start Shopping ..................................................................................................................................... 3
Shop .................................................................................................................................................... 3
Checkout ............................................................................................................................................ 5
  How to Checkout .............................................................................................................................. 6
  Entering Accounting Information .................................................................................................... 10
Western Marketplace - eProcurement ................................................................................................. 14
Small & Attractive or Fixed Assets Account Codes .......................................................................... 14
Quick Reference Sheet ....................................................................................................................... 14
  Changing Line item Detail ................................................................................................................ 18
  Splitting Accounting Elements/FOAPALS ....................................................................................... 18
Ad Hoc Review .................................................................................................................................. 20
View Workflow .................................................................................................................................... 22
System Messages ................................................................................................................................. 23
  Red Header Messages ....................................................................................................................... 23
  Elvis .................................................................................................................................................. 24
Order Status Messages ........................................................................................................................ 24
  Alert .................................................................................................................................................. 24
  Approval Rejected ............................................................................................................................ 25
  No Workflows Available .................................................................................................................. 26
  Partially Received ............................................................................................................................. 26
  Pending Approval ............................................................................................................................... 26
  Pending Encumbrance ....................................................................................................................... 27
  Pending Quote ................................................................................................................................ 27
  Pending Validation ............................................................................................................................... 27
  Provide Missing Data ......................................................................................................................... 28
  Received .......................................................................................................................................... 28
  Received and Closed ........................................................................................................................ 28
  Release Failed .................................................................................................................................. 29
  Submitted to Supplier ....................................................................................................................... 29
  Unsubmitted Transaction ................................................................................................................... 30
Splitting Accounting Elements/FOAPALS ...................................................................................... 30
E-Mail Messages ................................................................................................................................. 32
Finding Items ....................................................................................................................................... 32
Using Order Summary ........................................................................................................................ 33
  Accessing Order Summary ............................................................................................................... 33
  Search Criteria .................................................................................................................................. 33
  Running an Order Summary to the Screen ...................................................................................... 34
  Exporting an Order Summary ......................................................................................................... 34
APPENDIX A – Purchase Order Sample ............................................................................................ 35
APPENDIX B – Pop-Up Blockers ......................................................................................................... 36
Getting Started

Signing On

Once you have been set-up as a user/approver in Western Marketplace, you can access the application through Western’s single sign-on on the myWestern page. A Western Marketplace link will appear under Technology Tools.

A link is also available on the Business Services website Gateway to E-Procurement page.
Should you receive the following error message when logging into Western Marketplace, it is because you need to access the system through the Western Portal. Your email and password will not work from this screen.

![Error Message]

**Pop-up Blockers**

Pop-up blockers must be disabled. See Appendix B for information on how to disable Pop-Up Blockers.

**Contacts**

<table>
<thead>
<tr>
<th></th>
<th>Main Line</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing</td>
<td></td>
<td>650-3340</td>
</tr>
<tr>
<td>System Administrator</td>
<td>Susan Banton</td>
<td>650-2430</td>
</tr>
<tr>
<td>Back-up Administrator</td>
<td>Sharon Colman</td>
<td>650-3479</td>
</tr>
<tr>
<td>Forms</td>
<td><a href="mailto:ESM.Support@wwu.edu">ESM.Support@wwu.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

If Purchasing or a System Administrator are not available during an emergency, please contact ESM Solutions Support, (877) 969-7246 or [support@esmsolutions.com](mailto:support@esmsolutions.com).

**Navigation Tips**

As you navigate through the Western Marketplace, the buttons to the right of the screen (Add to Cart, Request, Continue, Apply, Update, Validate, View, Go, Hold, Delete) will change in color. If the button is grayed out, the action conveyed is not available until additional action is taken.

At the header level, the order status is typically shown to the right of the screen.
Start Shopping

Shop

Upon logging into Western Marketplace, the user is taken to the Shop page. The Shop page contains product catalogs.

1. **Log in** to Western Marketplace through Western’s single sign-on portal.

![Western Marketplace interface](image)

2. The Western Marketplace site will appear.

3. The **Shop, Cart, Checkout** tabs will appear. Depending upon your role, additional tabs such as approve, receive and invoice may appear.

4. **Select > Shop Tab**

5. To **Shop**, select from one or more of the “punch out” catalogs that appear.
   a. “Punch out” catalogs allow you to shop directly from the supplier’s website. When you complete the checkout process on the supplier website, the items you placed in the shopping cart are automatically placed into the shopping cart on the Western Marketplace to complete the checkout process.

6. Select the catalog you wish to use by:
   a. Clicking on the vendor logo, or
   b. Selecting the vendor catalog from the drop-down menu.

   You will then “punch out” to the vendor’s website; this can take 5 to 20 seconds.

7. Select the item(s) you wish to purchase from the vendor’s website, enter quantity for each item(s), and add the items to the cart on the vendor’s web page. On the vendor’s web page, you submit a cart or begin secure checkout (each vendor is slightly different).

   - **Kenney’s** – From view cart, click Submit Cart; this takes your items and transfers them to your Western Marketplace cart.
• **VWR** – Add items to your basket, then click on the graphical basket and select checkout, this transfers your items to the Western Marketplace cart.

• **Fisher Scientific** – Add items to your cart, then view your cart. From the view cart screen press the green button that says “Return Cart to Purchasing Application.” A checkout screen will appear, click the submit button and your cart will be transferred back to the Western Marketplace.

• **Office Depot** – Add items to your cart and then click Check Out; this transfers the items to your Western Marketplace cart.

• **GovConnection** – Add items to your cart and then begin secure checkout. You will be taken to a Review Order page where you scroll down and click Submit Cart.

For tips or tricks on vendor websites, see their documentation on the Purchasing website:

**Gateway to E-Procurement** - [http://www.wwu.edu/bservices/eprocure/index.shtml](http://www.wwu.edu/bservices/eprocure/index.shtml)

8. To review or check your items in the cart, **Select > cart tab.**

13. You can delete items or update quantities in the cart.
14. You may return to Shop and add items from other vendors to the same cart.

15. Once you are satisfied with the items in your cart, go to Convert Cart to (X number) of transaction(s) and Select > green Continue button.

16. Once you select Continue, this moves the items to the Checkout Tab.

**Checkout**

From the Checkout tab, the user can add notes, attachments, assign commodity codes, change the name in the Ship to Attn. area if needed, enter account code(s), and submit the transaction for approval. The user may request an Ad Hoc review, add split funding and change the Ship to an alternative approved location.

The sample below shows a transaction at the Header Level. Notice the blue triangle points sideways.

To get to the line level detail, select the small blue triangle to the left of the transaction #. Below is a screen shot of the header and line item detail areas.

To close up the line item detail click select the blue triangle, which is now pointing downward.

Below is a sample detail of an order with one line item.
How to Checkout

1. Once you select **Continue** from the **Cart** tab, the item(s) and supplier(s) move to the **Checkout** tab. You may checkout at the header level or drill down to the line detail level.

2. The **Checkout** tab displays the transaction information in the header. You can see:
   a. Marketplace transaction # (useful for searching!)
   b. System assigned transaction name
   c. Transaction requestor
   d. Supplier
   e. Total number of line items
   f. Total dollar amount of the transaction
3. **Payment Option.** PO is the only form of payment we are using.

4. **Order Type:** One Time is the default.

   **EHS Approval** is for orders containing explosive and radioactive materials and select biological materials and toxins. When the EHS Approval order type is used, the transaction goes to the Director of EHS for approval.

   **NOTE:** Electronic orders sent to suppliers via the Western Marketplace typically require no human intervention. Why is this important to note? If there are special requests you will need to call the supplier. If a supplier is set-up for this P-XML-automatic submission attachments, if added, will not be sent to the supplier.

5. You may now add **internal notes** and **attachments.** Only Western personnel will see internal notes and attachments.

6. **Select > Commodity Code**

   You may use the scroll down button to select the commodity code or begin typing a description.

   Commodity codes are used to identify items requiring tagging by Inventory Control. Below is a table of our current commodity codes with possible account codes. Accounts codes will vary depending upon what you are buying and the dollar amount. For definitions of account codes go to [http://www.wwu.edu/fs/as/expenseaccounts.shtml](http://www.wwu.edu/fs/as/expenseaccounts.shtml)

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
<th>Possible Account Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>03752</td>
<td>Novelties and Advertising Specialty Products (promotional items)</td>
<td>E241 [E244]</td>
</tr>
<tr>
<td>04500</td>
<td>Appliances &amp; Non-Commercial Equipment (lounge, break room)</td>
<td>E401 [E404] [E405]</td>
</tr>
<tr>
<td>20400</td>
<td>Computer Hardware &amp; Peripherals (desktops, <strong>laptops, tablets</strong>, Monitors, Printers)</td>
<td>E401 [E402] [E407]</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>Description</td>
<td>Possible Account Codes</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>20600</td>
<td>Computer Hardware &amp; Peripherals for Network and Enterprise Servers</td>
<td>E408, E409, E412</td>
</tr>
<tr>
<td>20700</td>
<td>Computer Accessories &amp; Supplies</td>
<td>E401, E402, E407, E408, E409, E412</td>
</tr>
<tr>
<td>20800</td>
<td>Computer <strong>Software for office computers.</strong> Includes license, support &amp; maintenance agreements</td>
<td>E116, E117, E402, E407, E408, E412</td>
</tr>
<tr>
<td>20900</td>
<td>Computer <strong>Software for networked &amp; Enterprise Servers.</strong> Includes license &amp; maintenance agreements</td>
<td>E157, E403, E413</td>
</tr>
<tr>
<td>42000</td>
<td>Furniture: Dormitory, Library, Lounges, Classroom</td>
<td>E401, E405, E408, E415</td>
</tr>
<tr>
<td>42500</td>
<td>Furniture: Office</td>
<td>E401, E405, E408, E415</td>
</tr>
<tr>
<td>48500</td>
<td>Janitorial Supplies General</td>
<td>E123</td>
</tr>
<tr>
<td>49000</td>
<td>Laboratory Equipment &amp; Accessories for general analytical &amp; research use</td>
<td>E115, E401, E404, E408, E414</td>
</tr>
<tr>
<td>60000</td>
<td>Office Machines, Equipment &amp; Accessories</td>
<td>E401, E404, E414</td>
</tr>
<tr>
<td>61500</td>
<td>Office Supplies – General</td>
<td>E111</td>
</tr>
<tr>
<td>64500</td>
<td>Paper (For Office, Lab and Print Shop Use)</td>
<td>E116</td>
</tr>
<tr>
<td>65500</td>
<td>Photographic Equipment &amp; Supplies (<strong>still, digital cameras, lenses, cases</strong>)</td>
<td>E111, E401, E404, E408, E414</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>Description</td>
<td>Possible Account Codes</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>72500</td>
<td>Telephone &amp; Telecommunication Equip, Accessories &amp; Supplies includes Radios</td>
<td>E401, E404, E408, E414</td>
</tr>
<tr>
<td>78500</td>
<td>School Equipment &amp; Instructional Supplies, (whiteboards, classroom &amp; items such as pre-printed instructional aids)</td>
<td>E112, E401, E404, E405, E408, E414, E415</td>
</tr>
<tr>
<td>84000</td>
<td>TV Equipment &amp; Accessories (projectors, video cameras &amp; DVD players)</td>
<td>E111, E401, E404, E408, E414</td>
</tr>
<tr>
<td>96286</td>
<td>Shipping &amp; other freight Costs</td>
<td>E242, E412, E413, E414, E415</td>
</tr>
</tbody>
</table>

7. **Purchase Order #** - The Marketplace assigns a temporary PO number. After the order is approved, the order is sent to Banner and assigned a 7-digit PO number starting with the letter “P”. If the PO number does not start with the letter “P”, the order has not been sent to Banner and is not encumbered.

8. **Ship To - Attn** – Users are assigned a default ship to address when set-up. This field is located at the header and individual line item level.

   If you wish to change the Ship To – Attn for the entire order, change the name at the header level and click Update.

   If you wish to change the Ship To – Attn on select line items, click on the blue triangle to expand the header and update the Ship To – Attn on only items you wish to change and then select Update again.
NOTE: The System Administrator adds addresses to the Marketplace. To ship to a location not in the system contact Purchasing. To change the address to one currently in the system, click “edit” and search for the location.

Entering Accounting Information

Chart of Accounts: After you enter an accounting string for the first time, it automatically becomes available on the drop down menu. You can also create favorites, which will be available on the drop down.

1. Select > Details next to Account Segment, located on the Checkout tab and the Account Code Detail Form will open.
2. **Select > Chart of Account**
   Choices are 1, 2 or 3

Select > **Index** (This is a FAST Index.)

3. Enter a FAST Index.

4. If you do not enter a FAST Index you must manually enter in the area below:
   - Fund
   - Organization
   - Account
   - Program
   - Activity (Optional)
   - Location (Optional)
If you enter a FAST Index, the Fund, Organization and Program will default as shown below.

5. You must now enter or Select > Account Code.

**NOTE:** It is important to enter the correct account code. Account codes enable an automated fixed asset (capitalization and inventory tagging) process through Banner. We have included an account code guide for you to use. For account code questions, contact Purchasing x3340.

If you know the account code, place your cursor in the description area, start typing the description, and select the desired account code.

6. Once you have selected an account, the Update button will turn blue.

7. Select > Update

8. Next, enter the accounting segment into the “Split Detail” area.

9. If you wish to split the dollar amount, change the percentage in the area labeled % Split. At the header level, you may only enter a percentage. At the line detail area, you may enter a dollar amount.

**NOTE:** If you use the percentage split and the dollar amount is not even due to rounding, you must use the line item detail (blue triangle) area to correct the error.
10. Once you select Update, the accounting segment will be added to your favorites and become available on the drop down menu.

NOTE: Once you save a favorite make sure the account code is still correct when you reuse it. You may need to update the account code.

11. Once the missing data (accounting element) is provided, the status will change to Validate.

12. Select > Update

13. The status will now change to Validate and a blue Validate button will appear. Select > Validate and the status will change to Unsubmitted Transaction.
Western Marketplace - eProcurement
Small & Attractive or Fixed Assets Account Codes
Quick Reference Sheet

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

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
<th>Account Code</th>
<th>If single item cost is under $1,000</th>
<th>If single item cost is $1,000 - $4,999</th>
</tr>
</thead>
<tbody>
<tr>
<td>20400</td>
<td>Laptops, Notebook Computers, Tablets &amp; Smart Phones</td>
<td>E407</td>
<td>E409</td>
<td></td>
</tr>
<tr>
<td>65500</td>
<td>Cameras, Still Picture (Digital cameras)</td>
<td>E404</td>
<td>E408</td>
<td></td>
</tr>
<tr>
<td>84000</td>
<td>Cameras, Motion Picture, (Video Cameras) &amp; Photographic Projection Equipment (Projectors)</td>
<td>E404</td>
<td>E408</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
<th>Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>20400</td>
<td>Computer Hardware &amp; Peripherals (Desktops, laptops, tablets, monitors, printers)</td>
<td>E412</td>
</tr>
<tr>
<td>20600</td>
<td>Computer Hardware &amp; Peripherals for network &amp; enterprise servers</td>
<td>E412</td>
</tr>
<tr>
<td>20900</td>
<td>Software for Networked/Enterprise Servers</td>
<td>E413</td>
</tr>
<tr>
<td>Varies</td>
<td>Any other type of Equipment or system making up one single item $5,000 &amp; above.</td>
<td>E414</td>
</tr>
<tr>
<td>42000 or 42500</td>
<td>Furnishings over $5,000</td>
<td>E415</td>
</tr>
</tbody>
</table>

Restricted items regardless of the cost use the following codes:

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
<th>Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>68000</td>
<td>Weapons, Misc. (Signal Guns, etc.)</td>
<td>E408</td>
</tr>
<tr>
<td>68000</td>
<td>Chemical Weapons &amp;Equipment</td>
<td>E408</td>
</tr>
<tr>
<td>68000</td>
<td>Firearms &amp; Accessories</td>
<td>E408</td>
</tr>
</tbody>
</table>
## COMMODITY CODE LIST

<table>
<thead>
<tr>
<th>Commodity Code</th>
<th>Description</th>
<th>Possible Account Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>03752</td>
<td>Novelties and Advertising Specialty Products (promotional items)</td>
<td>E241&lt;br&gt;E244</td>
</tr>
<tr>
<td>04500</td>
<td>Appliances &amp; Non-Commercial Equipment (lounge, break room)</td>
<td>E401&lt;br&gt;E404&lt;br&gt;E405</td>
</tr>
<tr>
<td>20400</td>
<td>Computer Hardware &amp; Peripherals (desktops, <em>laptops</em>, <em>tablets</em>, Monitors, Printers)</td>
<td>E401&lt;br&gt;E402&lt;br&gt;E407&lt;br&gt;E408&lt;br&gt;E409&lt;br&gt;E412</td>
</tr>
<tr>
<td>20600</td>
<td>Computer Hardware &amp; Peripherals for Network and Enterprise Servers</td>
<td>E401&lt;br&gt;E402&lt;br&gt;E407&lt;br&gt;E408&lt;br&gt;E409&lt;br&gt;E412</td>
</tr>
<tr>
<td>20700</td>
<td>Computer Accessories &amp; Supplies</td>
<td>E116&lt;br&gt;E117&lt;br&gt;E402&lt;br&gt;E407&lt;br&gt;E408&lt;br&gt;E412</td>
</tr>
<tr>
<td>20800</td>
<td>Computer <em>Software for office computers.</em> Includes license, support &amp; maintenance agreements</td>
<td>E157&lt;br&gt;E403&lt;br&gt;E413</td>
</tr>
<tr>
<td>20900</td>
<td>Computer <em>Software for networked &amp; Enterprise Servers.</em> Includes license &amp; maintenance agreements</td>
<td>E157&lt;br&gt;E403&lt;br&gt;E413</td>
</tr>
<tr>
<td>42000</td>
<td>Furniture: Dormitory, Library, Lounges, Classroom</td>
<td>E401&lt;br&gt;E405&lt;br&gt;E408&lt;br&gt;E415</td>
</tr>
<tr>
<td>42500</td>
<td>Furniture: Office</td>
<td>E401&lt;br&gt;E405&lt;br&gt;E408&lt;br&gt;E415</td>
</tr>
<tr>
<td>48500</td>
<td>Janitorial Supplies General</td>
<td>E123</td>
</tr>
<tr>
<td>49000</td>
<td>Laboratory Equipment &amp; Accessories for general analytical &amp; research use</td>
<td>E115&lt;br&gt;E401&lt;br&gt;E404&lt;br&gt;E408&lt;br&gt;E414</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>Description</td>
<td>Possible Account Codes</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>60000</td>
<td>Office Machines, Equipment &amp; Accessories</td>
<td>E401, E404, E414</td>
</tr>
<tr>
<td>61500</td>
<td>Office Supplies – General</td>
<td>E111</td>
</tr>
<tr>
<td>64500</td>
<td>Paper (For Office, Lab and Print Shop Use)</td>
<td>E116</td>
</tr>
<tr>
<td>65500</td>
<td>Photographic Equipment &amp; Supplies (still, digital cameras, lenses, cases)</td>
<td>E111, E401, E404, E408, E414</td>
</tr>
<tr>
<td>72500</td>
<td>Telephone &amp; Telecommunication Equip, Accessories &amp; Supplies includes Radios</td>
<td>E401, E404, E408, E414</td>
</tr>
<tr>
<td>78500</td>
<td>School Equipment &amp; Instructional Supplies, (whiteboards, classroom &amp; items such as pre-printed instructional aids)</td>
<td>E112, E401, E404, E405, E408, E414, E415</td>
</tr>
<tr>
<td>84000</td>
<td>TV Equipment &amp; Accessories (projectors, video cameras &amp; DVD players)</td>
<td>E111, E401, E404, E408, E414</td>
</tr>
<tr>
<td>96286</td>
<td>Shipping &amp; other freight Costs</td>
<td>E242, E412, E413, E414, E415</td>
</tr>
</tbody>
</table>
FAVORITE ACCOUNTING ELEMENTS

<table>
<thead>
<tr>
<th>Index</th>
<th>Chart</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Changing Line item Detail

1. If you need to make changes on the line item detail, **Select > Blue Triangle.**

![Image of line item detail interface](image)

2. This will expand the header area into the line item detail level.

3. On the line item level you can add, update or change:
   - Need by Date for the specific line item
   - Add notes and attachments (internal and external)
   - Change the commodity code for the specific line
   - Enter a different name on the attention ship to line
   - Change the accounting elements for the specific line and
   - Change the Ship to address by selecting “edit” and choosing a new address from the choices
   - Change the quantity you wish to order

Splitting Accounting Elements/FOAPALS

The user has the ability to split a transaction and charge various Foapals or accounts. Users may split a transaction at the header and line detail level.

1. If the accounting elements are split at the header level, you may only enter percentages. If the accounting elements are split at the line detail level, you may enter percentages or dollar amounts.
Once all changes have been completed **Select > Update**.

1. **Select > Validate**

2. Then **Select > Request Approval**

   The transaction routes to the Approver for approval. Once approved, the transaction is automatically submitted to the Supplier.

---

**Western Marketplace**

receive - susan@western washington university
Ad Hoc Review

Western Marketplace contains many standard workflows based upon predefined requirements. If a user wishes to send an Ad Hoc notification, select Ad Hoc Review under Next Step and then select the individual. If the individual you select has email notifications turned off, they must be personally notified as they will be unaware a transaction was sent to them.

There are two parts to Ad Hoc Review – send and respond. The user sends the Ad Hoc notice and the recipient responds. These Ad Hoc review is entirely separate from workflow approvals. An order can get approved even if an Ad Hoc review is pending a response.

Sending an Ad Hoc Review:

Once a user selects Ad Hoc Review under Next Step, a blue button labeled Ad Hoc appears. Select this button, a screen comes up, and then select the person to receive the notification.

The person receiving the Ad Hoc notification finds the transaction by searching under Ad Hoc or by the transaction #.
To respond to an Ad Hoc notice, the user receiving the notice goes to Next Step, selects Respond and then selects the **Green** Respond button.

A screen will appear asking if you wish to respond to the Ad Hoc Review.

If yes is selected, a text box appears for you to type a message for the Ad Hoc reviewer. When the note is closed, the transaction now indicates there is an internal note.

When the View Button is selected, the internal Ad Hoc note is available for view.
The approval routing is based upon many factors, including, but not limited to, budget authority, dollar limits, and items being purchased. A user may use “View Workflow” to see who needs to approve the transaction before it is automatically released to the Supplier.

Select View Workflow in the Next Step drop down menu area. Select the View button and the workflow for the specific transaction will appear, along with the status.

In the event you have a transaction that must go through multiple layers of approval, the View Workflow will tell you the status of the transaction.

After an order has been successfully submitted to the Supplier, the user can also View and Print a copy of the order. A sample purchase order is attached as Exhibit A.
System Messages

Throughout the procurement cycle, various status messages may appear in the Western Marketplace header area. These usually indicate a status change has been successful.

Examples:

Red Header Messages

If you receive a red header message this usually indicates a system problem. Try the same action again and if the error continues, contact your System Administrator.
Elvis

If you see Elvis, please return to the previous page and try to re-create the error. Please contact Purchasing or the System Administrator if you cannot continue.

Order Status Messages

Alert

There are several possible reasons for a system alert message. To see the alert message, click the red alert and an error box with a detailed message will appear. Purchasing or the system administrator will need to review the alert message and take action as needed.
Approval Rejected

This status indicates that the Approver sent this back to the original requestor. There will be an internal note. If the user hits Edit they will be able to open the note. If there was an error and the Approver corrected it, the originator can request approval by clicking “Request.” If the correction has not been made, the order must be corrected, updated and approval will need to be requested.
No Workflows Available

This status indicates that a workflow must be added to the system before approval. Contact your System Administrator.

Partially Received

This status indicates the transaction has been partially received and is still open to complete receiving.

Pending Approval

This status indicates somebody in the Approval chain has not approved the transaction. You may view the workflow to see who needs to approve the transaction.
Pending Encumbrance

This status indicates the transaction is waiting for Banner integration to activate. When the transaction integrates to Banner, it encumbers an assigned Banner purchase Order number that starts with a “P” and encumbers funds.

Pending Quote

This status indicates a user has requesting Purchasing obtain a quote. This feature will be available in Phase 3 of the rollout.

Pending Validation

This status indicates the transaction is waiting for validation from the Marketplace based upon the validation rules set up. If the order does not validate an alert should be issued.
Provide Missing Data

This status indicates one or more of the required items need to be completed. Currently, the accounting or chart element is the only mandatory item on this screen. Enter an accounting element and proceed.

Received

This status indicates an order has been received, but is not yet closed. Accounts Payable will close the transaction after they attach the invoice.
Received and Closed

This status indicates the transaction has been received and closed. It is possible to re-open the order to correct or adjust the receiving.

**NOTE:** Another status is “Closed.” If a transaction is closed without the transaction received or partially received and then closed, the transaction will need to be queried in receive, opened, received, and then closed. The transaction will then show a status of “Received and Closed.”

Release Failed

This status indicates the integration between ESM Solutions and the provider has an error. The System Administration needs to contact ESM Solutions Support.

Submitted to Supplier

This status indicates the transaction has been submitted to Supplier and is waiting for items to be received.
Unsubmitted Transaction

This status indicates the transaction has not been submitted for approval.

Splitting Accounting Elements/FOAPALS

Users have the ability to split a transaction and charge various FOAPALS or accounts. Users may split a transaction at the header and line detail level.

If a user splits a transaction at the header level and receives an error, the solution is to go into the line level detail (the blue triangle) and adjust your dollar amounts.

Open the order to the detail level and review the line item that has an error. Notice, line 1 is in red, indicating an error, but line 2 is not in red, and there is no error. Typically this error is due to rounding and the dollar amounts need to be adjusted.
Click the details button under Chart of Account.

The screen will provide information on the “remaining” dollar amount.

Make your corrections in either the USD Split box or the % Split box. Once the remaining amount is at $0.00, the button above “Cancel” should change to “Update” and then “Apply.”
You must now validate this order and request approval.

**E-Mail Messages**

Email messages are generated at various times and to various people throughout the ordering, checkout and approval cycles.

Examples of Emails coming soon.

**Finding Items**

There are different selection criteria under the Checkout or Approve Tab and the Receive Tab to find specific transactions or purchase orders.

Under the checkout tab, the selection box will allow you to find items by:

- Active
- Waiting
- Hold
- Archive
- Submitted
- Received
- Invoiced
- Ad Hoc
- All Last 30 days
- All Last 90 days
- All

In addition, you could enter a specific transaction# or PO#. The sort options are:
• Acct#  
• Create Date  
• Payment Form (Western is only using PO)  
• Transaction #  
• Transaction Name  
• Status  
• Recently Added

Under the Receive Tab, the selection box will allow to find items by:
• All Open
• Last 30 days
• All Closed
• All

In addition, you could enter a specific transaction# or PO#. The sort options are:
• Acct#
• Create Date
• Payment Form (Western is only using PO)
• Transaction #
• Transaction Name
• Status
• Recently Added

Another tool to find items is to use Order Summary.

**Using Order Summary**

**Accessing Order Summary**

1. A user may access *Order Summary* for an entity under *Menu> Order Summary* as shown below.

**Search Criteria**

1. The search screen allows the user to use any combination of the following fields:
   • Purchase Order #
   • Create Date (start/end range)
   • Fiscal Date (start/end range)
   • Transaction Number
   • Chart of Accounts
   • GL Account Code
   • Location (Ship To and/or Bill To)
   • Total Value ( =, > , >= , < , <= )
   • Supplier
   • Requestor
• Approver/Manager
• Status
• System Note

Running an Order Summary to the Screen

1. Enter the search criteria and **Select > Search**.

![Order Summary Image]

2. The **Order Summary Results** will display on the screen.

![Order Summary Results Table]

Exporting an Order Summary

1. Click on **Export** button to have the **Order Summary Results** in an excel.csv format sent via e-mail.
purchase order

GovConnection
NA
Merrimack, NH 03054
United States
Attn: Maureen Gallagher
Phone: 800-800-0019 x33176
Fax: 603-603-0718

Date: 5/13/2015
Purchase Order #: PI000280
Transaction #: 21694
Requested By: Susan Banton
Requester Email: susan.banton@wwu.edu
Phone: 300-050-2430
Authorized By: Sharon Colman

Ship To
Western Washington University
Business Services
333 32nd St AC140
PO Box 20420 Zip 98225-1420
Bellingham, WA 98225
United States
Attn: David Ma
Phone: (300) 050-3340

Bill To
Western Washington University
Accounts Payable
PO Box 20420
Bellingham, WA 98228-1420
United States
Attn: Accounts Payable
Phone: 215-448-3000

Order Comments:

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>UOM</th>
<th>QTY</th>
<th>Unit Price</th>
<th>Line To</th>
</tr>
</thead>
<tbody>
<tr>
<td>130140</td>
<td>Plantronics Savi W740-M Convertible Wireless Headset System for MS</td>
<td>EA</td>
<td>1</td>
<td>239.89 USD</td>
<td>239.89 U</td>
</tr>
<tr>
<td>83</td>
<td>Ship To Attn: David Ma</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract ID: 22222</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal: 239.89 U
Tax: 41.74 U
S&H: 0.00 U
Total: 281.63 U

APPENDIX B – Pop-Up Blockers

How to allow popups in internet browsers.

IE11

Click on tools, pop-up blocker, and pop-up blocker settings. Add the website to allow and click on close.

Chrome

Click the Chrome menu (☰)
Click the "Show advanced settings" link
Click on Content Settings under Privacy
Scroll down to the "Pop-ups" section
Click on manage exceptions and put in the site host name and click on Done.

Firefox

To access the pop-up blocker settings:

Click the menu button ☰ and choose Options. Preferences.
Select the Content panel.

In the content panel:

- Click on Exceptions tab to put in the web site you want to allow to display pop-ups.
The dialog has the following choices:

- **Allow**: Click this to add a website to the exceptions list.

**Safari on Mac OS X**

To change pop-up blocker settings:

1. Open Safari.
2. Choose Preferences from the Safari menu and click Security. Then click to select the Block pop-up windows checkbox.