

SelectSite/HigherMarkets Requisitioner Handbook

SELECTSITE / HIGHERMARKETS

REQUISITIONER HANDBOOK

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PREPARED BY



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TABLE OF CONTENTS

WELCOME	1
Objectives	1
Key Points	1
Understanding the Format	1
What you will learn.....	2
THE BASICS	3
Lesson 1: Overview	3
SciQuest Modules	3
Available Sites.....	4
Production Site.....	4
Testing Site	4
Training Site	5
Site Navigation.....	5
Navigation Details... ..	6
Lesson 2: Accessing the Application	9
Key Concepts.....	9
User Registration and Login	9
Users and Roles	9
Shoppers and Requisitioners	10
Exercises	10
Logging into the Application.....	10
Registering as a New User	11
Lesson 3: Updating your Profile.....	13
Key Concepts.....	13
User Profile.....	13
Permissions	13
Custom Fields	30
Exercises	30
View and Update the Profile.....	30
Changing Your Password	32
Updating Basic Profile Information	33

Updating Personal Settings	34
Reviewing Roles and Permissions	34
Setting up and Reviewing Financial Approval Information	36
Setting up and Reviewing Cart Assignees	38
Setting up Bill To and Ship To Addresses	38
Setting up Custom Field Values	40
Determining Email Preferences	42
Review User Profile History	42
Setting up Credit Card Information	43
SEARCHING FOR ITEMS	45
Lesson 4: Search Methods	45
Key Concepts	45
Searching and Shopping Techniques	45
Punch out and Hosted Catalogs	46
Search at a Glance	46
What's on the Screen? Understanding Product Search	48
Understanding Search Results	55
Searching Recommendations	57
How to Use Include Similar Terms	58
Additional Tips and Tricks for Searching	58
Recommendations for Administrators	59
Exercises	60
Performing Standard Searches	60
Advanced Search by Vertical	62
Advanced Search by Keyword	64
Searching by Supplier	65
Searching by Category	67
Searching with Punch-out Suppliers	68
Shopping from the Purchasing Showcase	70
Performing Chemical Structure Searches	71
Using Antibody Resource	76
Lesson 5: Additional Search Functionality	77
Concepts	77
Non-Catalog Item Entry	77

Forms.....	77
Exercises	77
Using Quick Order	77
Review Additional Supplier/Product Information	78
Refining Search Results	80
Using the Comparison Function	82
Using Forms	84
Entering Non-Catalog Items.....	85
YOUR FAVORITES	87
Lesson 6: Managing Favorites.....	87
Key Concepts.....	87
Favorites	87
Viewing Favorites in Search Results.....	87
Exercises	88
Adding Favorite Items to your Cart.....	88
Adding Items to My Favorites.....	89
Creating Favorites Folders and Sub-folders	90
Copying Items between Folders	91
Moving Items between Folders.....	91
Editing Favorite Items and Folders	92
Deleting Favorite Items and Folders	92
SHOPPING CARTS AND CHECKOUT.....	93
Lesson 7: Shopping Cart Functionality	93
Key Concepts.....	93
Shopping Carts	93
Exercises	93
Adding Items to the Cart	93
Removing Items from the Cart.....	97
Updating Items in the Cart	97
Reviewing Line Item History	98
Deleting Shopping Carts	99
Creating New/Draft Carts.....	100
Reviewing Cart History	100

Lesson 8: Checking Out.....	103
Key Concepts.....	103
Assigning a Cart.....	103
Submitting a Requisition: The Checkout Process	104
Exercises	105
Assigning a Cart to a Requisitioner	105
Reviewing a Cart Assigned to Me	106
Assigning a Substitute Requisitioner (for Assign Cart).....	107
Populating Header Details.....	108
Populating Line Item Details	109
Entering Taxes and Shipping & Handling Information	110
Reviewing the Workflow Process	111
Submitting the Shopping Cart	111
Lesson 9: Miscellaneous Tasks.....	113
Exercises	113
Copying Previous Requisitions to a New Cart.....	113
Placing Orders on Behalf of Other Users	113
REVIEWING AND EXPORTING HISTORY	115
Lesson 10: Accessing Historical Data	115
Concepts	115
History Searching	115
Exercises	116
Reviewing My Requisitions.....	116
PR Search by PO Number	116
PR Search by Requisition	117
PO Search by PO #	118
PO Search by Requisition.....	119
PO Search by Supplier/SKU.....	120
Lesson 11: Using Search Exports.....	1
Key Concepts.....	1
Search Exports.....	1
Exercises	2
Exporting Purchasing and Invoicing Data.....	2
Using the PO and PR Templates.....	4

WELCOME

OBJECTIVES

The purpose of this handbook is to familiarize requisitioners with the SciQuest SelectSite / HigherMarkets application. We hope it will help you:

- Understand the available functionality in the SelectSite application.
- Search for and order items at the best possible price.
- Create flexible, easy-to-understand purchase requisitions and purchase orders.
- Easily manage the requisition process.
- **NOTE:** The Approval Process is now covered in separate document: SelectSite Approval and Workflow Setup Handbook.

KEY POINTS

- This handbook will show you how to perform functions in the system. It is important to note that much of the *how, when, and why the system is used* is determined by your organization's business practices. We suggest that you supplement this document with your organization's business practices, goals, and policies.
- End user topics range from registering as a new user, defining your user profile, searching for items to purchase, assigning an order to someone else, and submitting an order. As a shopper or requisitioner, you may only have permissions to perform a subset of these functions. Typically, if you cannot perform a task, it is either not available in your site (based on site setup) or is reserved for an approver or system administrator.
- The term **SelectSite** is used to describe the application in this handbook. For Higher Education customers, this term represents your HigherMarkets application. HigherMarkets and SelectSite can be used interchangeably from a product feature perspective.

UNDERSTANDING THE FORMAT

A **Lesson** is created for each major functional area of the system. Within each lesson, there are three sections:

1. An overview of the goals and functions in the lesson
2. Background and conceptual information about the lesson. The concepts will help you better understand why and when you perform tasks in the system and how they relate to other parts of the system.
3. Step-by-step exercises detailing specific tasks in the system. Each exercise provides background information about the task, details about the typical user, step-by-step instructions, and in many cases, a results screen to compare your work.

WHAT YOU WILL LEARN...

The document is organized according to the major functions of the SciQuest SelectSite application:

- **The Basics**- includes an overview of SelectSite and its modules, site navigation, accessing Online Help, accessing the site (login), and defining your user profile.
- **Searching for Items**- using the different types of search methods available, comparison shopping, ordering non-catalog items, and more.
- **Favorites**– includes setting up items as personal favorites, along with creating folders to manage your favorites.
- **Shopping Carts and Checkout**– including defining your requisition, populating header and line-level information, reviewing workflow processes, placing orders for other people, and more.
- **Requisition and Order History**– reviewing requisitions currently being processed, reviewing purchase requisition history, and purchase order history.

THE BASICS

Lesson 1: OVERVIEW

The SelectSite eProcurement solution is a robust, hosted, fully modular suite of applications that manages the entire purchasing process online. A **typical procurement process includes the following steps:**



The SelectSite application includes modules that address each step in the procurement process. The full suite of applications provides an end-to-end eProcurement solution. Alternatively, individual modules can be used to complement other applications currently in use. Details of each module and add-ons are described below.

SciQuest Modules

A full list of modules available from SciQuest is provided below. The modules marked with * indicate those that are documented in this handbook.

- **Sourcing Manager** – provides online electronic bidding and reverse auction functionality.
- **Contract Manager** – allows you to manage current supplier contracts and spend against those contracts.
- **Spend Director*** – provides online access to supplier content and university contracted pricing so the users can shop for and compare products and pricing
- **Requisition Manager*** – automates requisition approval processes
- **Order Manager*** – electronic purchase order delivery to supplier
- **Settlement Manager*** – provides the ability to receive goods and electronic invoices. Note: This handbook contains miscellaneous information about receiving and invoicing, but not a full explanation of the module.
- **Business Intelligence Reporting*** - provides detailed data for spend analysis
- **Chemical Manager** – provides management of chemicals, including container and location information
- **Supplies Manager** – provides management of supplies on site, including stockroom availability and ordering via SelectSite.

IMPORTANT:

Throughout this handbook, the term **Spend-Director** only is used to describe a limited deployment of SelectSite that is commonly purchased by organizations for integration into an ERP system. To better understand which parts of this handbook are applicable to you, please contact your administrator.

Available Sites

With each implementation of SelectSite, one or more sites will be set up specifically for your organization. The site setup is dependent on the needs of your organization, the modules implemented and integration points, and site setup defined in your Licensing agreement. In many cases, three sites will be set up for an organization. An explanation of each of these follows:

PRODUCTION SITE

The production site is the most important site that any organization will use. The production site is the one that is used on a day-to-day basis by users after go-live. This site contains live data and reports are based on the purchasing activity in this site. All suppliers and their data, along with customized settings should be enabled on this site. The production site is accessed through SciQuest's Production Servers, which are available 24/7, allow a large number of simultaneous users, and are extremely reliable.

Your production site is accessed from the following location:

[http:// solutions.sciquest.com/<organization name>](http://solutions.sciquest.com/<organization name>)

For example: <http://solutions.sciquest.com/universityABC> or
<http://solutions.sciquest.com/PharmaceuticalsABC>

TIP:

Be very cautious when making changes directly to the production site. It is suggested that all changes be tested in a test environment prior to updates being made in the production site. Remember, there is no Undo function.

TESTING SITE

The Testing site (previously termed UIT - User Integration Testing) is used for a number of different purposes. This site is primarily designed as a tool for integration testing into third-party applications, data import, and data export. It is also used for initial site testing and review/verification of new functionality prior to site upgrades. Three weeks before a new release, the functionality is available to customers on their Testing site.

For customers that do not have a training site, Testing is occasionally used for informal training purposes. Testing sites are accessed through SciQuest's Test servers, which are restarted approximately twice daily (12pm and 5pm EST). **These servers are not designed for high volume testing and use.** Additionally, only a subset of supplier and supplier data is typically set up on Testing sites.

Your Testing site is accessed from the following location:

[http:// usertest.sciquest.com/<organization name>](http://usertest.sciquest.com/<organization name>)

For example: <http://usertest.sciquest.com/universityABC> or
<http://usertest.sciquest.com/PharmaceuticalsABC>

Unlike Production and most Training sites, changes to Testing sites take effect relatively quickly because the servers are restarted at least twice daily. The Test servers may also be restarted in the case of an emergency, when a request has been made.

TRAINING SITE

Some customers have a training site which is used for formal end-user training. Most training sites are set up on SciQuest's production servers (the same as production sites), due to their reliability and ability to handle a high volume of activity simultaneously. Training sites typically have a subset of suppliers and supplier data set up. Training sites provide a great way to educate end-users without risking accidental "ordering" or site changes.

Most training sites are accessed from the following location:

[http:// solutions.sciquest.com/<organization nameTrain>](http://solutions.sciquest.com/<organization nameTrain>)

For example: <http://solutions.sciquest.com/universityABCTrain> or
<http://solutions.sciquest.com/PharmaceuticalsABCTrain>

Except in an emergency, training sites on the production servers are only restarted once a week. These weekly restarts occur Thursday night.

Site Navigation

The SelectSite interface is customized on a per-user basis. The tabs, screens, and ordering of information is based on what parts of the system each user has access to, along with their personal preferences of presentation. There are a few key things to understand about site navigation and availability of system functionality:

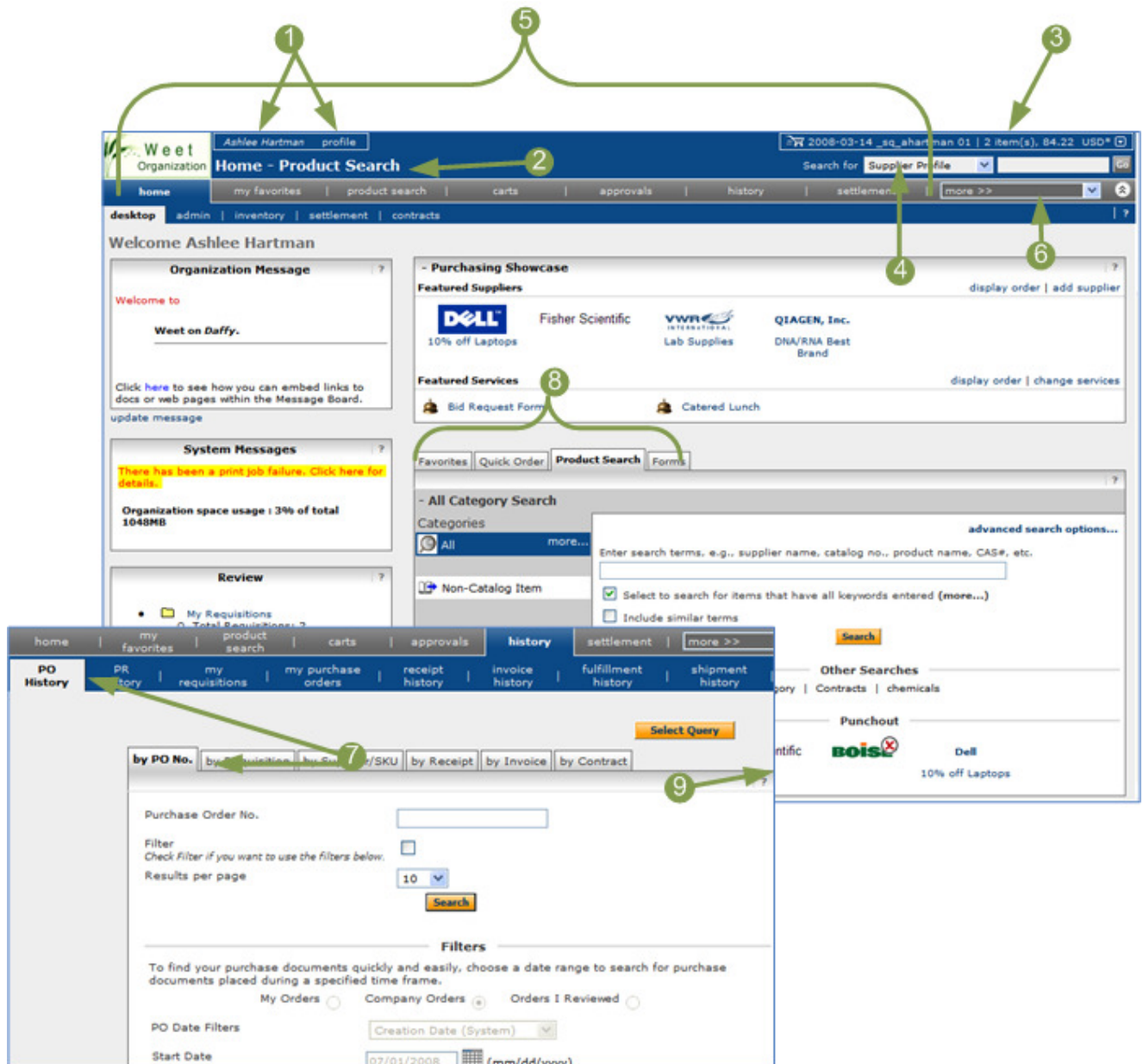
- The navigation tabs that show up across the top of your screen are dependent on 1) the modules your organization has purchased, 2) your role, and 3) your permissions.
- SelectSite allows users to customize the order of navigation tabs on their screen so that they can access frequently-used sections of the system quickly. For example, someone who frequently reviews purchase requisitions may want the approvals tab to show up first instead of the default home tab. *Note: Allowing access to customized navigation is a permission, and may or may not be allowed at your organization.*

KEY POINT:

The screens, tabs, and field labels discussed and shown in this handbook may or may not match those used by your organization. SelectSite is very customizable; therefore you should expect differences between this generic guide and your site.

NAVIGATION DETAILS...


The graphic below shows various facets of SelectSite navigation. Read the descriptions following the graphic for more information about each of the navigational components:



- 1. User Information.** In the upper left-hand corner of the application, information about the user is displayed within a boxed area. In this box is the user's name, a link to the user's profile (provided the user has access to their profile), and the logout link. Keep in mind that some sites remove the logout link, especially if the site is Spend Director only.
- 2. Screen Title.** In the application header, just below the user information box, the title of the current screen displays. Note that the screen title reflects changes made in field management.
- 3. Cart Summary.** The upper right corner displays a summary of the shopping cart. Included is the cart name (by default, this is your user name, the date, and sequential order # for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.

4. **Quick Search.** This feature allows a variety of searches to be executed from anywhere in the application. To use this feature, a search option must be selected and search criteria must be keyed in. Clicking the Go button executes the quick search and displays the results in the appropriate search results screen.
5. **Navigation tabs.** Across the top of the application are navigation tabs (the number of tabs is dependent on the licensed SelectSite modules and the permissions granted to the individual user). By clicking on a tab, the information in the screen refreshes to display the topic or function covered in that particular part of the application. The number of tabs available to each user is dependent on their permissions. The names of the navigation tabs are customizable and can be modified by a system administrator. For examples, your tab may read *Favorites* instead of *my favorites*. The order of the navigation tabs is customizable by the user (assuming the user has this permission). Each of the standard navigation tabs for a user is listed below. The navigation tabs are listed in the default order.
NOTE: Additional tabs will be visible for approves, organizations using Supplies Manager, etc.
 - a. **Home**— provides access to the desktop and admin home screens. From the desktop home screen, searches can be performed, the organizational message is displayed, and purchasing information can be reviewed. From the admin home screen, a wide variety of admin links are available for selection, including shortcuts to catalog management, user management, and field management, to name a few. Also available on this screen is the link to the SciQuest Support incident tracking interface. The last sub-tab selected is remembered and displayed the next time the home navigation tab is selected.
 - b. **Favorites**— is used to create and define company 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.
 - c. **Product Search**— contains the same four tabbed screens shown on the home > desktop page, which allow detailed product searches, quick searches in the case where the product SKU is known; ordering of favorite items, and the population of forms (such as service forms and non-catalog forms). In addition, this screen allows searches from specific verticals and access to punch-out suppliers.
 - d. **Carts**— is used to view and modify the current shopping cart, create new carts and delete existing carts, and prepare the cart for processing (adding shipping info, populating custom fields, etc.).
 - e. **History**— contains a repository of various documents within the application. Purchase requisitions, purchase orders, receipts, invoices, and fulfillment orders are all available for viewing, depending on the permissions granted.
 - f. **Settlement**— provides access to system receipts and invoices along with the ability to create new receipts and invoices, given the proper permissions.
 - g. **Profile**— is used to review and update personal user information ranging from time zone, assigned roles, approver information, email preferences, and more.
6. **More>> Navigation Menu.** For users that have access to more than seven navigation menus, an eighth menu is displayed on the far right side of the screen. This menu contains a drop down list which displays the text *more>>*. Expanding the drop down list reveals the remaining navigation menus available to that user. Upon selecting the desired navigation menu, the screen below refreshes to display the specific topic or function covered in that particular part of the application, just as if any of the static navigation menus had been selected.

For users with the Customize Navigation permission, this drop down list will also appear, even if that user has access to seven or less navigation menus. The drop down list contains a “customize” option at the bottom of the list. Selecting this option redirects the user to the Navigation Setup screen where the navigation can be customized to best suit the user’s needs.
7. **Navigation Sub-tabs.** Beneath the top-level navigation are sub-tabs. As with navigation tabs, the sub-tabs displayed depend on the permissions granted to the individual user. By clicking on these sub-tabs, the information in the screen below refreshes to display the specific topic or function covered in that particular part of the application.

8. **Search Options.** Although a number of the Desktop screens contain sub-tabs, this screen is most important because it is used for product searches. To access a specific function, click on the tab at the top of the box. The active tab is highlighted. From the Search tabs, a wide variety of functions are available, including the ability to execute detailed product searches and quick searches, in the case where the product SKU is known, add favorite items to the cart, and populate forms (such as service forms and non-catalog forms). This screen also allows searching using specific verticals and access to punch-out suppliers. This information is covered in detail in the Requisitioner and Approver Handbook.
9. **Online Help.** Online Help is accessed by clicking on the question mark anywhere in the application () or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays. For those organizations who have the feature enabled, hover help is enabled, which allows users to view help for a field when pausing at a field.

Lesson 2: ACCESSING THE APPLICATION

This lesson focuses on end-user access to the SelectSite application. Depending on your organization's configuration and whether login is integrated with an external system, the details of registration and login varies.

Key Concepts

USER REGISTRATION AND LOGIN

There are a few key ways in which users can register and login to the application. Depending on how your organization has selected to configure the application, one of the following methods will be applicable:

- **User Self Registration** – With this method, a user logs directly into SelectSite (via a specific address entered into a web browser). Once accessing the application, the user requests to use the site by registering his or her information. From there, the user will either automatically be approved as a standard requisitioner or shopper OR an administrator will review the user's request for approval/rejection. For more information, refer to Registering as a New User on page 10 for more information.
- **Administrative Setup and Notification** – Users are set up by an administrator, and each user is notified of their username and password. Registration is required from the user if his/her username is created by an administrator. Once the user receives his or her username and password, the user can login to the application. Refer to Logging into the Application on page 10 for more information.
- **Access via an External Application** – Users log into an organization-specific portal or an ERP system (such as Oracle, SAP, Ariba, etc), and the user information is sent over to SelectSite where the information is verified and automatically logged in. With this method of user setup and access, each integration varies slightly. For example, for clients that only use the Spend Director module, users may log into their ERP system, and then click the SelectSite option to access the application. Information is sent from the ERP system and no additional information is needed in terms of user setup. In another scenario, administrators may be required to set up a user in SelectSite PRIOR to access from the external system. Contact the System Administrator for more information on external login.
- **Direct Login with External Validation** – With this method, users login directly into the SelectSite application. They enter their standard username and passwords and this information is validated from your organization's servers via LDAP.

USERS AND ROLES

A user is any person that has access to the SelectSite application. Each user is assigned a username and password to identify who they are, what their permissions are, and other user-specific information such as ship-to addresses, custom field values, and more. Users can be assigned to a specific role or roles, can be assigned to a specific department, have specific product views controlling what items are available to them, and more.

Roles are created to manage users with similar permissions. Each application will have at least two roles: One representing standard requisitioners and one representing system administrators. One role must be designated as the default role. In most cases, the default role is the requisitioner role (end users). Roles provide a time-efficient method for managing user information. For example, instead of changing user permissions individually, simply update the permissions at the role level, and the system will automatically update user permissions. It is possible for users to have more than one role.

SHOPPERS AND REQUISITIONERS

Requisitioners are individuals that can shop for items and submit a requisition. By submitting a requisition, all required information must be filled out – such as ship to information, required accounting fields, etc. Some organizations also set up a Shopping role that allows a user to shop, then assign a cart to another individual (user or approval) for submission and processing. Shoppers simply add items to their cart, but are not required to enter detailed information about the requisition.

Exercises

LOGGING INTO THE APPLICATION

This exercise demonstrates how a user can log in **directly** to the SelectSite application. This exercise assumes that the user has been registered and approved.

IMPORTANT: Keep in mind, many organizations access SelectSite through a different login. For example, you may login to a portal, then automatically be logged into SelectSite. This exercise only pertains to direct login (i.e. – no login integration). Please contact your system administrator if you have questions about your login if an integration method is used.

Note: In some cases, users may have more than one site that they access. For example, your organization may have a training and production site. Please make sure you are accessing the correct URL.

Step by Step

The goal of this exercise is to log into SelectSite.

1. Go to the address specified by your organization's administrator using the preferred Internet Browser. Typical URLs are as follows: <http://solutions.sciquest.com/<org name>>.
2. Enter a valid **User Name** on the login screen. Username is case sensitive. If unsure of the proper User Name, then contact the System Administrator.
3. Enter a valid **Password** on the login screen. Passwords are case sensitive. If unsure of the proper password, then reset the password through the **Forgot Your Password?** link just below the Password field. *Note: This link is not available on all sites.*
4. Click the **Go** button. The SelectSite application displays. Once logged in, the role(s) and permissions assigned to the user dictate what screens are visible and what functions are accessible.

IMPORTANT:

If the user does not have a user name, then he/she should register from the application or contact the System Administrator.

REGISTERING AS A NEW USER

By registering as a new user, the user is indicating that he/she would like to search for and order items via SelectSite. When registering, users must set up basic information such as user name, password, and contact information.

After registering, users will either be taken to the application as a default user (requisitioner or shopper) OR an administrator will review the registration and accept or reject it. The new user will receive an email when the registration is processed.

Step by Step

The goal of this exercise is to access the SelectSite login page, and from there, register as a new user.

1. Go to the address specified by the administrator, for example: <http://solutions.sciquest.com/<orgname>>.
2. Select the link at the bottom of the screen that reads: **If this is your first visit, please register here.** This will take users to the **New User Registration** form.
3. Complete the form, including all required fields (indicated by bold text). Note: Users should complete the *Question* and *Answer* fields so that the password can be reset by an Administrator, if necessary.
4. Click the **Submit** button.
5. Click the **Back to Login** link.
6. Check the Inbox of the email address entered in Step 3. The user should receive a confirmation message once the registration has been submitted and processed

Lesson 3: UPDATING YOUR PROFILE

Each user in the system has a unique profile, including identification, purchasing abilities, and site accessibility. The purpose of this lesson is to better understand what information is captured in the profile, along with what should be updated by the user.

IMPORTANT:

Most organizations allow users to access their profile, even if it is only read-only. The exception is with Spend Director-only sites. If access to the profile has not been granted, this lesson is not relevant.

Key Concepts

USER PROFILE

Users with the appropriate permissions have the ability to access their own profile. Selecting the [profile](#) navigation menu provides access to the user profile screen. The screen is also accessible via the [profile](#) link in the application header.

The user profile screens are grouped into tabs, each with its own set of sub-tabs, for easy viewing. Below are a few examples of what can be captured in the user profile:

- Roles and permissions (access to site)
- Department and position assigned (if applicable)
- Cart Assignees for a Shopper
- Financial approver assignments
- Custom field values
- Email Notifications
- Bill To and Ship To addresses

Depending on the permissions granted, the sub-tabs may be editable or read-only. Profile information can be set up by an administrator, users, or a mix of both. It depends on the individual organization's business practice.

The exercises in this section assume the user has view and edit access to the profile.

PERMISSIONS

Permissions determine what a user can do in the site. Permissions are broken down by related topic such as shopping and administration. A few sample permissions are listed below:

- Shopping – allows online shopping in SelectSite
- Punchout – provides access to punch-out suppliers
- My Favorites – allows access to view and edit personalized favorites items

Permissions can be assigned at both the role and user level. Permission access for a user is set up in the user's profile; under the permissions tab. Click on the permission name to view a description of the permission (online help for the permission).

The following table provides a full list of permissions, along with descriptions of each.

Tab/Section of Profile	Permission Name	Permission Description
Shopping / Cart Shopping		
	Hosted Catalog Search	Ability to perform searches across the hosted catalog only.
	Punchout	Ability to access punchout vendors.
	View/Use Forms	Ability to use all system-defined forms such as service form, supplier form, etc.
	View/Use Non-Catalog Item	Ability to use the non-catalog item entry screen.
	Non-Catalog Configuration	Allows a user to modify the standard Non-Catalog Form or Item.
	Bypass Non-Catalog Search	When turned on, allows the user to bypass the required search of the hosted catalog for the item (by SKU) requested. To force a user to search the hosted catalog, turn this permission off.
	Modify Order Distribution Information on Forms & POs	Allows the user to override and change the order distribution settings for a supplier master supplier in a form, as well as to do the same for any supplier on a PO, both in workflow and post-distribution (for resends). The user will be able to click a checkbox to edit the specific distribution information for a request. Any changes only affect the specific request and do not affect the settings in the supplier profile.
	Create Free-form Supplier on Form Templates	Allows user to enter a new supplier when completing a form template. A user with this permission can enter a supplier outside of the supplier master list.
	Create New Form Template	Provides a user the ability to create a new form template based on a form type of Capital Expenditure or Service.
	My Favorites	Controls access to personalized favorites.
	View Organization Favorites/Forms	Provides ability to view organization favorites as well as add items to your shopping cart. This permission also controls access to Organization Forms, if used by your organization.
	Edit Organization Favorites	Provides the ability to edit and configure the organization's favorites list. This permission also prevents editing of Organization Forms. Users without this permission will still be able to access the form and save it to their personal Favorites folders. They will not be able to overwrite the original

Tab/Section of Profile	Permission Name	Permission Description
		Organization Form.
	View Product Compare	Provides the capability to use the product comparison feature in search results.
	Chemical ReSource	Provides access to the Chemical ReSource and Chemical Structure Search tool.
	Antibody ReSource	Provides access to the Antibody ReSource module.
Shopping/Cart Cart/Requisition		
	Prepare Req for Another User	This permission turns on the Prepared For field in the Header Information section of the requisition and is also required in order to be an "assignee" for a shopper assigning his/her cart. This field allows a user to order on behalf of another individual.
	Do not permit Place Order	This permission prohibits the user from being able to complete the checkout process. The permission is OFF by default which allows the user to checkout and submit a cart for approval. Typically, this permission is granted to shoppers who assign carts instead.
	Assign Cart to Another User	Provides the ability to assign a shopping cart to another user. The permission activates a new button on the cart page to perform this function. The user can select from a list of users that have the Prepare Req for Another User permission.
	Edit User's Cart Assignees	Provides the ability to edit the cart assignee list in a user's profile. The cart assignee list is a list of users that are available to a user when attempting to assign a shopping cart to another user. The permission also allows a user to find other users not in their profile at the time they are performing the assignment.
	Edit PO Number	Provides the user with the ability to define the PO number for a requisition prior to the actual PO being created (during PR workflow). This may be used to add a specific PO number to a requisition before it is distributed to the supplier.
	Edit Credit Card	Provides the ability to edit the card numbers stored in a user's profile. If the user is authorized to edit the card number at checkout, if necessary, turn this permission on.
	Manually Override Pricing	This permission allows users to manually change pricing for hosted catalog items. Changes can be made in draft shopping carts

Tab/Section of Profile	Permission Name	Permission Description
		as well as pending PRs and POs. The user must also have the Edit Pending PR/POs permissions to change pricing for pending documents.
	Select Credit Card from Profile	Provides the ability to select a credit card number (if enabled) at checkout to apply to line items in the requisition. Card numbers are stored in a user's profile.
	Header-level internal attachments	Provides the ability to attach internal documents and URLs at the header level in a requisition.
	Header-level external attachments	Provides the ability to attach external documents and URLs at the header level in a requisition. Header level external attachments on a requisition are distributed on all fax or email POs generated by the requisition.
	Line-level internal attachments	Provides the ability to attach internal documents and URLs at the line item level in a requisition.
	Line-level external attachments	Provides the ability to attach external documents and URLs at the line item level in a requisition. Line level external attachments on a requisition are distributed on a fax or email PO to the specific supplier of that line item.
	Allow editing of Tax, Shipping, and Handling	Allows a user to override system defaults and enter custom Tax, Shipping and Handling charges both in shopping carts and approvals (PR or PO).
	Bypass Review	Ability to place a requisition without looking at the Review breadcrumb page.
	View Line Item History	This permission allows a user to perform a line item history search. Line item history searches past requisitions and orders for the exact catalog item.
	Withdraw PR	Provides the ability to withdraw a requisition or line item from PR workflow prior to PR approvals being completed.
	Modify PO Clauses in PR/PO	For requisitions, controls the ability for users to add additional clauses. The user will also be able to remove clauses that have been added in addition to the clauses associated from the organization, supplier or contract. For purchase orders, controls the ability for a user to add and remove all clauses.
Orders My Orders/		

Tab/Section of Profile	Permission Name	Permission Description
Organization Orders		
	View My Orders	Provides the ability to a user to view his or her orders through the order history link.
	View Organization Orders	Provides the ability for a user to view all of the organization's orders through the order history link.
	Edit Organization Orders	Provides the ability for a user to edit and update any organization orders.
	Revise PO	Allows a user to revise a purchase order once it has been sent to a supplier. This may be necessary in the event that there is a minimum quantity required or if the price changes, etc. This permission does not include the ability to resend a PO to a supplier. Users with this permission will see in Purchase Order History editable fields on the Summary and Details tabs, the <i>Finalize Revision</i> action in header Action list, and the Revisions tab.
	Close purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this permission is on, the user will have the purchase order action to Close PO if the purchase order is currently open.
	Open purchase orders	Controls the user's ability to update the Accounting status of a purchase order. If this permission is on, the user will have the purchase order action to Open PO if the purchase order has already been closed.
	Resend PO to Supplier	Allows a user the same permissions as <i>Revise PO</i> as well as the ability to resend purchase orders to suppliers via fax or email. Resending a PO automatically creates a revision.
	Resend PO to External System	Allows a user to resend an order to an external system via the PO export. This permission is only application with customers that have an export integration.
	Export Search Results	This permission provides the ability to export information from the following sections: PR, PO, Receipts, Invoices, and Fulfillment POs. Once the export request is made, the user will have

Tab/Section of Profile	Permission Name	Permission Description
		access to the Search Exports screen (located on the History tab) to view their own exports.
	Manage Company Exports	This permission provides access to manage exports across an organization. Users with this permission will be able to see all exports and delete any export if necessary.
	Manage Order Failure Notifications	<p>Users with the Manage Order Failure Notifications permission have access to the PO Distribution Maintenance (po dist maintenance) page, which is under the error mtg tab. When the system receives a fax failure notification, it will determine if the order was distributed using customized order distribution information, and, if so, it will post an entry in the table.</p> <p>Users with this permission also have the option to enable the <i>PO Distribution Failure Notice</i> email in their user profile Email Preferences.</p>
	Search History by Approver	<p>This permission allows end users to search for their orders by specific approvers – in other words by the people that approved/rejected their orders. Users with department access can search by approver and all the orders that the user has approved within that department display. Users with organization-wide history permissions can view all the orders the selected approver has reviewed.</p> <p>When this permission is granted, an additional filter (By Approver) is provided in the PR and PO History screens.</p>
	Revise Purchase Order Number	This is a high-level permission and should only be granted to a select few individuals at your organization. This permission allows a user to modify the system-generated purchase order number prior to or after the PO is sent to the supplier. An example of when this is done is if your organization's financial system is down and you need to go in and update the number once the "real" number is available.
	View Sensitive Credit Card Details	Allows the user to view credit card information within the application. A user with this

Tab/Section of Profile	Permission Name	Permission Description
		permission can see the full credit card number, expiration date, and card security code on documents in the application. This permission is OFF by default.
	Manage Integration Export Failures	<p>Users with the Manage Integration Export Failures permission can manage Batch PO and/or Invoice export failures through SelectSite. Users with this permission have access to the error mgt navigation tab, and subsequent sub-tabs: PO export queue and Invoice export queue.</p> <p>Users with this permission also have the option to enable the following emails in their user profile Email Preferences: <i>Invoice Export failure notification</i> and <i>PO Export failure notification</i>.</p>
Orders/ Sales Order Fulfillment		
	Forward Sales Orders	This permission allows users to forward a sales order to another user that is allowed to fill sales orders. This permission is typically granted to stockroom personnel using Supplies Manager or individuals receiving orders initially for third-party suppliers.
	Fulfill Sales Orders	This permission should be granted to any user that is responsible for viewing and filling sales orders.
	Assign Substitute Approver for Sales Order Approvals	Provides the user with the ability to assign a substitute for a sales order approvals folder. This permission displays the Substitute link on the sales order fulfillment approvals list page.
	Edit Any Pending Sales Orders	Provides the user the ability to edit any Sales Order that has not been completed/closed. This includes any Sales Order currently assigned to another approver for fulfillment.
	Approve/Reject Sales Orders on behalf of another Approver	Provides the ability to approve or reject sales orders for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open POs that are assigned to another user and continue them in the process. The "change of hands" is tracked in History. This permission does not allow a user to view another user's folders. You must have the permission below (Manage Other Approver's SO Approval folders) to perform this task.

Tab/Section of Profile	Permission Name	Permission Description
	Manage Other Approver's Sales Order Approval folders	Provides the ability to access and view another user's Sales Order approval folders. With this permission, you can view another approver's workload. To be able to approve or reject the orders that you are reviewing, you must also have the permission listed above (Approve/Reject Sales Orders on behalf of another person).
	Create Sales Invoices/Credit Memos	User is able to create a sales invoice or credit memo. The completed sales invoice/credit memo will be delivered to the customer's SelectSite/HigherMarkets Settlement Manager module
	View Sales Orders	The user can see the Sales Order Search screen, perform Sales Order searches, view Sales Order Search Results and view Sales Orders.
	View All Sales Orders	Provides the ability for a user to search and view all of the organization's sales orders and corresponding shipments, regardless of fulfillment center access assignments for the user.
	Close/Complete Sales Order	The user will be able to close the sales order once the sales order has been totally shipped.
	Manage Order Failures	An administrative permission that allows the user to view orders that were not emailed/faxed properly and resend if needed.
Approvals/ Requisition Approvals		
	Edit Pending Requisitions	Provides the ability to edit and update any pending requisitions within the approver's folders.
	Approve/Reject Requisitions	Provides the ability to approve or reject requisitions within an approver's folders.
	Forward Requisitions	Allows an approver to forward a requisition to another approver. This permission displays the Forward button on the PR approvals page.
	Order Consolidation	Provides the ability to create and submit consolidated carts. Items can only be consolidated from a requisition if the requisition is in pending status within the Order Consolidation workflow folder. This permission is only available with PR workflow.
	Put Requisitions On Hold	Allows an approver to put a requisition on hold. A requisition that is on hold will remain

Tab/Section of Profile	Permission Name	Permission Description
		in that approver's PR approvals folder. This permission displays the Hold option in the PR approvals Action lists.
	Expedite Requisitions	Provides the user with the ability to Expedite a requisition through the PR approval process. A user with this permission can "pull" a requisition through any pending PR workflow steps (that permit expediting).
	Assign Substitute Approver for Purchase Requisition Approvals	Provides the user with the ability to assign a substitute for a requisition approvals folder. This permission displays the Substitute link on the PR approvals list page.
	Add Products to Consolidated Cart	Allows the user to add products to a draft order consolidation shopping cart (Order Consolidation is part of requisition workflow only).
	Add Lines to Pending Requisitions	Provides the ability to add a new line to any pending requisitions within an approver's personal PR approvals folder. Approvers with this permission will have the Add to Other Cart/PR/PO action on the Search Results page.
	Restart/Skip Requisition Workflow Steps in Error	Provides the ability to restart workflow for any pending requisitions within an approver's personal PR approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgement message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows an admin to restart the step, i.e., resend the message.
	Edit Any Pending Requisitions	Provides the ability to edit any pending requisition regardless of whether it is assigned to you or not. The types of pending requisition that can be edited are the following: <ul style="list-style-type: none"> ▪ Unassigned requisitions in a shared folder ▪ Requisitions assigned to another approver's personal workflow folder Requisitions in a workflow error state in an automated workflow step.
	Approve/Reject Requisitions on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The "change of hands" is tracked in History. This permission does not allow a user to view another user's folders. You must have the

Tab/Section of Profile	Permission Name	Permission Description
		Manage Other Approver's Requisition Approval folders permission to perform this task.
	Manage Other Approver's Requisition Approval folders	Provides the ability to access and view another user's Requisition approval folders. With this permission, you can view another approver's workload. To be able to approve or reject the orders that you are reviewing, you must also have the Approve/Reject Requisition on behalf of another person permission.
	Expedite requisition through all workflow steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PR workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Approvals/ Purchase Order Approvals		
	Edit Pending Purchase Orders	Provides the ability to edit and update any pending purchase orders within the approver's folders.
	Approve/Reject Purchase Orders	Provides the ability to approve or reject purchase orders within an approver's folders.
	Forward Purchase Orders	Allows an approver to forward a purchase order to another approver. This permission displays the Forward option in the approvals Action lists.
	Put Purchase Orders On Hold	Allows an approver to put a purchase order on hold. A PO that is on hold will remain in that approver's PO approvals folder. This permission displays the Hold option in the PO approvals Action lists.
	Expedite Purchase Orders	Provides the user with the ability to Expedite a purchase order through the approval process. A user with this permission can "pull" a PO through any pending steps (that permit expediting).
	Assign Substitute Approver for Purchase Order Approvals	Provides the user with the ability to assign a substitute for a purchase order approvals folder. This permission displays the Substitute link on the PO approvals folder page.
	Add Lines to Pending Purchase Orders	Provides the ability to add a new line to any pending purchase order within an approver's personal PO approvals folder. Approvers with this permission will have the Add to Other

Tab/Section of Profile	Permission Name	Permission Description
		Cart/PR/PO action on the Search Results page.
	Restart/Skip Purchase Orders Workflow Steps in Error	Provides the ability to restart workflow for any pending purchase orders within an approver's personal PO approvals folder. This is typically necessary with workflow that triggers or receives integration messages. If an acknowledgement message is not received in the allotted time or after the defined number of retries, the step goes in to error status. This functionality allows admin to restart the step, i.e., resend the message.
	Edit Any Pending Purchase Orders	Provides the ability to edit any pending purchase order regardless of whether it is assigned to you or not. The types of pending purchase orders that can be edited are the following: <ul style="list-style-type: none"> ▪ Unassigned purchase orders in a shared folder ▪ POs assigned to another approver's personal workflow folder ▪ POs in a workflow error state in an automated workflow step.
	Approve/Reject PO on behalf of another Approver	Provides the ability to approve or reject requisitions for another user. This is a very powerful permission and should be assigned with caution. This permission allows a user to open requisitions that are assigned to another user and continue them in the process. The "change of hands" is tracked in History. This permission does not allow a user to view another user's folders. You must have the Manage Other Approver's PO Approval folders permission to perform this task.
	Manage Other Approver's PO Approval folders	Provides the ability to access and view another user's PO approval folders. With this permission, you can view another approver's workload. To be able to approve or reject the orders that you are reviewing, you must also have the Approve/Reject PO on behalf of another person permission.
	Expedite PO through all workflow steps	Use of this permission is highly cautioned. This permission allows a user to bypass all steps in PO workflow, regardless of whether they are assigned as an approver in that step. This step should mainly be used for testing purposes and should only be assigned to a select few individuals at each organization.
Accounts Payable / Budget		

Tab/Section of Profile	Permission Name	Permission Description
	View Budget Details	User can view the information of a budget by accessing it through the organization setup/budget screens. No editing of budget information is permitted.
	Create/Edit Budget Details	The user is allowed to manage budget parameters, e.g., definition of fiscal year as well as create and edit budgets for custom field values. The View Budget Details permission is not required.
Accounts Payable / Invoice Approvals	** Please refer to Settlement Manager Handbook for details. **	
Accounts Payable / Settlement Manager	Create Receipts	The user can create receipts for the purchase orders to which they have access. For example, users with My Orders permission can create receipts only for purchase orders they create.
	View Receipts	The user can view receipts for the purchase orders to which they have access. For example, users with My Orders permission can view receipts only for purchase orders they create.
	Enable Blind Receiving - (Hide Order Quantity during receiving)	If the user has this permission, they will not see the quantity ordered when creating receipts. This is a common practice when central receiving is done by shipping dock personnel versus desktop receiving where the person placing the order is also receiving it.
	View My Invoices	Allows a user to view his or her invoices in the application. If this permission is set to OFF, the user does not see the invoice link in the Settlement tab or the invoice tab on the Purchase Order screen. The user cannot edit the invoice with this permission, which is controlled through the Create / Edit Invoices permission.
	View Organization Invoices	Allows a user to view all invoices in the application. If this permission is set to OFF, the user does not see the invoice link in the Settlement tab or the invoice tab on the Purchase Order screen. The user cannot edit the invoice with this permission, which is controlled through the Create / Edit Invoices permission.
	Create / Edit Invoices	Allows a user to create invoices manually as well as edit invoice details. A user with the permission turned ON has the ability to edit the invoice details with the exception of the invoice status. The ability to change invoice status is controlled by two permissions: Set Invoice as Payable and Set Invoice as Paid.

Tab/Section of Profile	Permission Name	Permission Description
	Set Invoice as Payable	Controls the user's ability to set an Invoice to a Payable status. If this permission is off, the user does not have the option to set the invoice status to Payable. The user must have Create/Edit Invoice permission the change the status of an invoice.
	Set Invoice as Paid	Controls the user's ability to set an Invoice to a Paid status. If this permission is off, the user does not have the option to set the invoice status to Paid. The user must have Create/Edit Invoice permission the change the status of an invoice.
	Match documents within tolerances	Provides the ability for the user to match documents that are within the configured tolerances.
	Force match documents	Provides the ability for the user to match documents that are outside the configured tolerances for the selected documents.
	Unmatch documents	Controls the user's ability to change Match status for the selected documents from Matched to Unmatched.
	Resend Invoices to External System	Allows the user to re-submit an invoice to be exported to the external system(s). The external system must be configured to allow invoice resends (see organization setup > system > document export > Connection Mgt) and the invoice must have been initially exported to the external system(s). In this event, the user will see the Resend Invoice button on the invoice.
Administration/ System Administration		
	Administration	This set of permissions allows a user to access and modify settings within the Administration application. Users must have this permission, in addition to other Administrative permissions, to access and modify any of the Administrative functions.
	Field Management	This permission allows users to change field display text, update a field as visible or required, change help text, add and delete values from lists and activate or inactivate lists. Users may also edit field-based help when granted this permission.
	List Management	With this permission, users may create lists (where lists exist in either dropdown menu or list box fields) and add and edit values within those lists.

Tab/Section of Profile	Permission Name	Permission Description
	Custom Field Management	Provides access to the custom field administration screens. Users with this permission can: Add/Edit custom fields Add/Edit custom field values Select the positioning of new or existing custom fields
	Address Management	This permission provides the recipient access to the Address Management section through which a user can create or modify Ship To/Bill To addresses. As address modification can be dangerous in the application, please give this permission only to users who have been trained on this functionality and are aware of the implications of Address Management.
	Manage Shared Workflow Folders	Provides the user with access to manage all types of workflow folders (PR, PO, etc.); with this permission, the user can control user access to any workflow folders.
	Catalog Management	Provides access to the catalog management tools within administration. Note that approving pricing files also requires the <i>Catalog Reports</i> permission.
	System Configuration	With this permission a user has the ability to access and edit system configuration settings, including security and session settings, language support, automatic job generation (replenishment), and system color settings.
	License	With this permission a user may access the license section under the configuration tab. It is recommended that this permission only be given to users in the Super Repository Manager role.
	Transaction Reports	Controls access to transaction reports within administration (Orders reports and Spend reports). Users with this permission can also view and download monthly Data Extracts and Templates.
	Catalog Reports	Provides Catalog Administrators with access to catalog Content Reports, as well as ability to approve/reject pricing files and the pricing file audit trail.
	Usage Reports	This permission allows users to view reports related to site usage – by day, month, etc.
	Consortium Reports	This permission is only applicable to sites that are set up as a consortium – They allow the user to see rolled up summary reports of what

Tab/Section of Profile	Permission Name	Permission Description
		spend has happened on each of the member organizations for a consortium supplier.
	Edit Company Message	Provides the ability to edit and update the company message.
	Edit Resource Information	Controls access to edit the Resource information (e.g. support phone and email) on the home page. Users with this permission can edit and update this information.
	Contract Manager	Contract Manager is the greater of the two Contract Management permissions. Users with it are able to manage any and all contracts. They may view others' contracts irrespective of the non-owners Full or Partial visibility. They may view all Contract Reports.
	Contract Owner	Contract Owner is the lesser of the two Contract Management permissions. Users with it are able to manage only their own contracts. They may view others' contracts where the other owners have granted non-owners Full or Partial visibility, and they may view reports based on the same limitations.
	Advanced Dynamic Workflow	This permission allows a high-level user (admin) access to advanced dynamic workflow, which is used to set up advanced rules to trigger workflow approvals.
	Edit Items/Catalogs	Provides access to the item/price navigation menu, where item information is loaded and updated in SelectSite.
	Syndicate Items/Prices	Provides the ability to promote item and price data to users via product search.
Administration/ User Administration		
	View My Profile	With this permission users may access and view information submitted when the user generated their user profile. This user profile is generated the first time a user logs in or completes registration in the application.
	Edit My Profile	When granted this permission users may access, edit, and update the information submitted in their user profile. In order to activate permission editing, the user must have the Edit All User Profiles/Roles/Permissions permission.
	Change Password	Users with this permission have the ability to change their password. If the user also has the access to other users' profiles, this person may change the passwords of other users as well.

Tab/Section of Profile	Permission Name	Permission Description
	Edit Personal Information	This permission grants access to the Personal Settings sub-menu under the profile > User Settings tab. Information such as Language, Country, Time Zone, and Color Theme are all managed from this screen.
	View All User Profiles	This permission allows users to access and view user profiles of other users registered in the application.
	Edit All User Profiles/Roles/Permissions	With this permission users may access and utilize functionality to create, search for, and grant roles and permissions to users within the application.
	Edit Roles/Depts/Relationships	Allows users to create and edit roles within the application. Permissions can be associated with roles that have been created within the HR Configuration section.
	Edit My Supervisor for Approvals	Provides access to the user to select their supervisor for use in financial approval. Once selected, any requisitions that exceed the user's spending limits will be routed to their supervisor for approval.
	Edit User's Financial Approvers	Select or remove financial approvers for all users.
	Customize Navigation	Users with this permission have the ability to select which navigation menus appear at the top of the screen as well as the order in which they are displayed. By default, this permission is turned off. Users that possess this permission and the Edit All User Profiles/Roles/Permissions permission have the added ability to define the navigation menus for other users in the system.
	Edit Fulfillment Center Access	This permission allows a user to determine who has access to which fulfillment centers, which in terms of Supplies Manager, represents individual stockrooms.
Custom Field Permissions (Note: The same four permissions display for each custom field enabled on your site.)		
	View Personal List	Allows the user to view the name of a particular custom field in the Custom Fields section. The user will also see an Edit button that will allow them to view or edit (depending on other CF permissions) the list of custom field values for this Custom Field.

Tab/Section of Profile	Permission Name	Permission Description
		Without View Personal List or Edit Personal List permissions a user will not see the custom field name at all in the Custom Fields section.
	Edit Personal List	<p>Automatically provides same functionality as View Personal List, but also provides the user a Create New Values button in the Custom Fields Edit section. Click to open the New Values section where the user may select from a list of org values (requires View Org Values permission) or create personal values (requires Create Values for Personal List permission).</p> <p>Without View Personal List or Edit Personal List permissions a user will not see the custom field name at all in the Custom Fields section.</p> <p>Without Create Values for Personal List or View Org Values permissions a user will not actually be able to edit the list of custom field values for this custom field.</p>
	View Organization Values	<p>Allows the user to search through and select from organization-defined values for this custom field.</p> <p>NOTE: If an organization sets up custom fields so that end-users cannot select values or add values to their list (i.e. – view only), the end user will still be allowed to define a default value for the custom field).</p>
	Create Values from Personal List	Allows the user to create their own values (stored in their profile) for this custom field.

CUSTOM FIELDS

Custom fields are used to track information specific to an organization. Custom fields can be used to identify financial information associated with an order, used to assign a buyer, or can be used to identify Yes/No or On/Off type information. The number of custom fields, along with the custom field type, varies based on your organization's needs. Custom fields can display in a number of different locations on a purchase requisition or purchase order.

Depending on how the custom field is set up and what permissions are assigned to the users, a custom field can be viewable only by certain users/roles, can be freeform entry, can be selected from an administrator-defined list, or can be pre-selected for the user by an administrator. NOTE: In the cases where a user is given view-only privileges for a custom field, he/she will still be able to assign the default value.

NOTE TO SUNGARD HE CLIENTS:

There are required fields that must be set up in a specific manner to enable communication between the two systems. These include FOAPAL codes, Chart, and Commodity Code – which is optional. If additional custom fields are created in SelectSite, they will *NOT* be transferred between the systems.

Custom fields can be grouped, for splitting purposes. Splitting allows the assignment of multiple values to a field. For example, Department (custom field 1) and Account (custom field 2) are grouped. The user wants to split the purchase across Departments A and B, and to split across Accounts Y and Z. At checkout, the user enters a single split ratio (e.g. 60-40) for the group of fields, and then enters the Department and Account values.

Custom Field Types

There are three ways a custom field can be populated, each of which is described below. The custom fields permissions dictate the field type for the custom field. The types include:

- **Free form**— With this type of custom field, the value of the field is entered by the user at checkout. This value is not validated by a previously created value. This type of field can be required or optional.
- **User-defined drop-down**— With this type of custom field, one or more values must be set up for the field in the user profile. The user can determine the value of the field in the profile (i.e. create new values for their own use). The values added to the profile are then available during checkout for selection.
- **Admin-defined drop-down**— In the last type of custom field, which is the most common for custom fields, the values selected in the profile are derived from a list defined by the administrator for all users. Users select admin values to be used in their profile, and the selected values display at checkout.

Exercises

VIEW AND UPDATE THE PROFILE

IMPORTANT: This exercise is not relevant to Spend Director-only clients.

When first logging into SelectSite, navigate to the profile screen and review the current information, making changes as necessary. Depending on how the site is set up, administrators may set up ALL profile information or set up a subset of profile information. Users may have full, limited, or no access to their profile. **The exercises in this lesson assume the user has standard permissions (view and edit).**

At a minimum, basic information must be set up in a user's profile for a user to login and use the system. It is recommended to set up additional information prior to using the system so that the cart submission is easier. For example, by setting up a user's ship to address and default custom field values in his profile, the information will be defaulted into an order and does not require selection with each purchase.

Step by Step

This exercise is broken up by task. The goal of this exercise is for a user to access and view their profile, and update the appropriate areas. ONLY perform those tasks that are relevant for your organization and/or the user.

IMPORTANT:

Each of the profile tabs/sections mentioned in this exercise may not be applicable to your organization.

1. Access your profile. This can be accomplished a few different ways:
 - a. The first time that a user logs into the system, the **My Profile** displays (shown below).
 - b. ... or... Click on the **profile** link at the top of the screen (to the right of the username).
 - c. ... or... Select the **profile** navigation tab.

Once the profile is accessed, the **User Settings → User Identification** sub-tab displays.

The screenshot shows the 'My Profile' page with a search bar at the top right labeled 'Search for Catalog No. (SKU)'. Below the search bar is a navigation bar with links: home, my favorites, product search, carts, approvals, history, and settlement. Underneath is a sub-navigation bar with tabs: User Settings (selected), Purchasing, Permissions, and History. The 'User Identification' sub-tab is active, showing fields for First Name (Andrew), Last Name (Banks), Phone Number (1 919 555-5555), E-mail Address (abanks@yourorg.com), Department (English), Position (dropdown), User Name (andrewbanks), and a section for password recovery questions (Question, Answer, Confirm Answer). A 'Save' button is at the bottom right.

2. Tips for working within the profile:
 - The available tabs in the user profile are dependent on which modules your organization has purchased.
 - To open any of the profile screens, select the top-level tab and then the desired sub-tab. Once a screen is displayed, it is in "edit" mode for those with the appropriate permissions.
 - Bold fields are required.
 - If any of the information is incorrect and the screens are read-only, contact your system administrator.
 - If the screen is editable, additions or modifications may be done directly within that screen of the profile.
 - The labels for the tabs may be different at your organization. Profile field labels are commonly renamed to better help users understand the purpose of each section.

3. Review and update your profile. Each of the tasks that can be performed is listed below:

- Changing Your Password on page 32
- Updating Basic Profile Information on page 33

ADDING PROFILE VALUES FROM YOUR CART

You can update profile data directly from the profile (as discussed here) or as you are reviewing your cart. Oftentimes you have the option to **Save to profile**, a checkbox available in the selection popup. **NOTE: Defaults must be defined via the profile and cannot be defined directly from the cart screen.**

- Updating Personal Settings on page 34
- Reviewing Roles and Permissions on page 34
- Setting up and Reviewing Financial Approval Information on page 36
- Setting up and Reviewing Cart Assignees on page 38
- Setting up Custom Field on page 40
- Determining Email Preferences on page 42
- Review User Profile History on page 42
- Setting up Credit Card Information on page 43

4. After updating the profile, click the **Save** button to save the changes. Note: The Save button must be selected on each screen for changes to be saved. Navigating to another screen without clicking the Save button will lose any changes made on the previous screen.

CHANGING YOUR PASSWORD

Occasionally you may need to change your password in SelectSite. For example, if your password has expired or if you have forgotten your password. Additionally, some organization's force users to reset their password if an administrator changes it for him/her. When creating a new password, the user is prevented from resetting their password back to the "old" value. Once the password has been updated, the previous password will no longer work in the system.

Administrators cannot see the current password for users in the system, they only have permission to reset passwords.

NOTE:

This exercise is not applicable to organizations that access SelectSite via an external system or login.

Two options for changing the password are detailed below. The first option uses a *Forgot your Password* link that displays on the login page. This link may not be available on your site. If this is the case, refer to option 2 or contact your system administrator for assistance.

Step by Step

The goal of this exercise is to change your password through one of the two methods explained below.

OPTION 1: When you forget your password...

1. From the **Login** screen, click the **Forgot your Password** link. The **Reset Password** screen displays.
2. Enter your username and email (associated with the user name), then click the **Go** button.
3. A **Reset Password Email** will be sent, containing a link back to the site. Either click this link or cut and paste it into the Web browser's address bar.
4. After the site opens, enter the answer to the question provided during registration, then a new password in both the **User Password** and **Retype User Password** fields.
5. Click the **Go** button. SelectSite opens and you are logged in.

OPTION 2: When you know your current password...

6. Login to the system.
7. Select the **Profile** navigation tab (or the profile link in the upper left-hand corner). The user profile displays.
8. Click the **Change Password** button. (Note: If this button does not appear on the screen, the permissions may be set such that this function is turned off). A secondary window displays.
9. In the secondary window, enter your current password in the **Old Password** field. Then enter the new password in the **New Password** and **Confirm New Password** fields.
10. Click **Change Password** to save the new password. The password has been updated.

NOTE: Click **Close** on the secondary window to cancel the password changes.

UPDATING BASIC PROFILE INFORMATION

Basic user information, such as first name, last name, and contact information are updated through the User Profile. The information on the **User Identification** tab is editable with the exception of the username. This cannot be changed or modified. If a new username is needed, a new user will have to be created and the old user record can be inactivated if no longer needed.

Step by Step

The goal of this exercise is to update the information in the User Identification section of the User Profile.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
3. From the **User Settings → User Identification** sub-tab (which opens up automatically), modify any of the available information. First Name, Last Name, Phone Number, Email Address, Department and Position, and password fields are all editable.
4. Click the **Save** button to save any changes made.

UPDATING PERSONAL SETTINGS

The Personal Settings profile screen is used to determine the time zone, default color theme, and language. Each of the settings tracked in this section of the user profile are set up at an organization-wide level. By modifying this information in your profile, you are simply changing your particular settings.

Step by Step

The goal of this exercise is to update the Personal Settings section of the User Profile.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
3. Select the **User Settings** tab, then select the Personal **Settings** sub-tab.
4. Review the current settings. To make changes to this information, edit the desired fields and click **Save**. Each of the configuration options is described below:
 - **Language**: This field determines the language displayed on the screen.
 - **Time Zone**: This field allows users to change their own personal time zone stamp. Time is tracked for each transaction logged in the system such as purchases made, approvals, and more. Note: Some organizations choose to keep all of their users on one time zone for easier record-keeping.
 - **Color Theme**: This field permits a user to override the organization's default **Color Theme**. The pre-defined color themes manage font, border, background and highlighting colors.
 - **User Interface**: This field permits a user to choose the "look and feel" of the application and override the organization's settings. Prior to August 2008, the **Original** option was the only one available. The new **Gradient** option provides a more user-friendly choice.
 - **Help on mouse over**: This field determines whether or not field-specific help displays when "hovering" on a field in SelectSite. This feature can also be disabled directly from the pop-up screen, and is by default, on. **Select Show help on mouse over and click** to display hover help. If you would only like to see help if a field is selected (clicked), choose **Show help only on click**.
5. Click the **Save** button to save changes made.

REVIEWING ROLES AND PERMISSIONS

Permissions determine what functions are available to a particular user, including what navigation tabs and screens are viewable and editable by the user. When a role is assigned to a user, default permissions are automatically given to the user, but can be overridden by an administrator if necessary.

Role and permission-related information is captured in a number of screens (tabs) in the user profile. The following areas of the user profile are discussed in this exercise:

- **User Settings → Roles**: Provides a read-only list of the role or roles assigned to the user.
- **User Settings → Department Permissions**: Provides a read-only list of the departments that the user is allowed to view data via History (PR History, PO History, Receipt History, etc). For example, the Manager of the HR department can view all orders processed for his department. By default, users can only see their own order history. Typically, approvers have access to at least one department in addition to their own personal order history.
- **Purchasing → Product Views**: Provides a read-only list of product view(s) assigned to the user. Product views are used to control what suppliers and types of products can be viewed by users. Your organization may or may not use product views.
- **Purchasing → Punchout Access**: Provides a list of suppliers whose website can be accessed directly from your SelectSite application. This read-only list is used to indicate which suppliers can be accessed from the user.

- **Permissions:** The Permissions tab contains numerous sub-tabs listing the available permissions, along with which permissions are enabled for the user. This information is defaulted from the role-level.

IMPORTANT:

This exercise assumes that the user has read-only rights to the areas of the profile discussed.

Step by Step

The goal of this exercise is to review what permissions are enabled for the user, along with which permissions are overridden from the role level.

1. **Login** to the system.
2. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
3. Review Role(s):
 - a. Select the **User Settings** tab, then select the Roles sub-tab.
 - b. Review the current role or roles that are assigned.
4. Review Departmental Permissions:
 - a. Select the **User Settings** tab, then select the **Department Permissions** sub-tab.
 - b. Review the list of departments assigned in the **My Departments** box. Department access is typically not granted to standard requisitioners. In this case, no departments will be listed on this screen. Departments are not listed individually for administrators will Organization-wide access (a permission).
5. Review Product View(s):
 - a. Select the **Purchasing** tab, then select the **Product Views** sub-tab.
 - b. A listing of active product views displays. A green check (✓) in the Available column indicates the product view is enabled. A red X (✗) indicates the product view is disabled. Product views determine what hosted data is available to the user, including which suppliers are visible, what types of items can be viewed/ordered, and ordering limitations around hazards, chemicals, etc.
6. Review Punchout Access:
 - a. Select the **Purchasing** tab, then select the **Product Access** sub-tab.
 - b. This section provides a list of available punchout suppliers. A green check (✓) in the Available column indicates the punchout supplier is available. A red X (✗) indicates the punchout supplier is not available.

7. Review Permissions:

- a. Select the **Permissions** tab. The graphic below shows a sample permissions screen enabled for a shopper role:

User Settings

Purchasing

Permissions

History

Shopping/Cart

Orders

Approvals

Accounts Payable

Administration

Custom Fields Permissions

?

Permission	Value
Shopping	
Hosted Catalog Search	✓
Punchout	✓
View/Use Forms (including Non-Catalog Form)	✓
Edit Non-Catalog Form Template	✗
Add multiple non-catalog items using one form	✓
Bypass Non-Catalog Search	✓
Modify Order Distribution Information on Forms & POs	✗
Create Free-form Supplier on Form Templates	✗
Create New Form Template	✗
Add To Catalog	✗
My Favorites	✓
View Organization Favorites/Forms	✓
Edit Organization Favorites	✗
View Product Compare	✓
Chemical ReSource	✓
Antibody ReSource	✓

Permission	Value
Cart/Requisition	
Prepare Req for Another User	✓
Do not permit Place Order	✗
Assign Cart to Another User	✗
Edit User's Cart Assignees	✗
Edit PO Number	✗
Edit Credit Card	✓
Manually Override Pricing	✗
Select Credit Card from Profile	✓
View Sensitive Credit Card Details	✗
Header-level internal attachments	✓
Header-level external attachments	✓
Line-level internal attachments	✓
Line-level external attachments	✓
Allow editing of Tax, Shipping, and Handling	✓
Bypass Review	✓
View Line Item History	✗
Withdraw PR	✓
Modify PO Clauses in PR/PO	✗

- b. Permissions are organized by topic in the sub-tabs. A green check (✓) in the Value column indicates the permission is enabled for the user. A red X (✗) indicates the permission is disabled for the user. Review the permissions enabled.

NOTE:

For a detailed explanation of a permission, click the permission name from the profile. Online Help displays.

8. If you find that any information in your profile does not look correct, it is recommended to contact your system administrator.

SETTING UP AND REVIEWING FINANCIAL APPROVAL INFORMATION

The workflow process in SciQuest is used to manage the purchasing approval process, along with managing system functions such as purchase order creation and delivery. The steps in a workflow process can vary based on organization, user, custom field values, dollar amounts, and more.

Financial approvals allow organizations to trigger approvals based on a user's financial limits. If this type of workflow approval is used by an organization, it is typically the first manual approval step in the workflow process. This means that outside of auto-rejections and other system validations, a user's financial approver is the first person to review and approve/reject the requisition.

How Financial Approval Works (if used): Financial Approval is required when a user submits a requisition that is above their allowed limit, in which case, an approval is required by a specified approver. For example, David Jones is assigned the Requester1 role with a requisition limit of \$400. He submits a requisition for \$45

which does not require Financial Approval. He submits a second requisition for \$600, and Financial Approval is required.

There are two sub-tabs in the profile related to a user's financial workflow setup. The **Financial Approvers** sub-tab identifies what other user(s) can approve your orders. **Purchasing/Approval Limits** is used to identify what amounts trigger activity such as approval.

The exercise below assumes that a user has read-only access to the Purchasing/Approval Limits screen of the profile and read-write capability to the Financial Approvers screen.

Step by Step

The goal is for an end-user to set up his/her up financial approvers, define a preferred approver, and review approval limits.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Review and update a user's financial approver list:
 - a. Select the **Purchasing** tab, then select the **Financial Approvers** sub-tab. Any previously assigned financial approvers are listed.
 - b. To add a user as a financial approver, click the **Add Approvers** button at the top of the screen.
 - c. Perform a user search to locate the username for the desired financial approver(s). Only those users with approval permissions can be selected.
 - d. When the desired financial approver has been found, click the **Select** button next to the Financial Approver's name, and click **Choose Selected User**. The approvers name displays in the approver list.
 - e. From the approver list, click the **Preferred** button to make the user the default approver for your orders.
 - f. Repeat steps 2b – 2d to add additional approvers to your list.
3. Review purchasing limits:
 - a. Select the **Purchasing** tab, then select the **Purchasing/Approval Limits** sub-tab. A screen similar to the one below displays

User Settings	Purchasing	Permissions	History
Custom Fields	Financial Approvers	Purchasing/Approval Limits	Payment Options Addresses Product Views Punchout Acces
		Limit	Value
		Requisition Limit	0
		Requisition Line Item Limit	0
		Requisition Approval Limit	0
		Requisition Line Item Approval Limit	0
		Purchase Order Limit	0
		Purchase Order Line Item Limit	0
		Purchase Order Approval Limit	0
		Purchase Order Line Item Approval Limit	0
		Limited Purchase Order Limit	0
		Line Item Limited Purchase Order Limit	0

- b. Review the various limits and amounts. If the value for a specific type of limit is 0, this indicates that approval is required for all requisitions and orders. Otherwise, approval is only required when a requisition or order is above the total or line-item level value displaying on the screen.

IMPORTANT:

Only approvers with higher limits than the user are allowed to approve a requisition or order.

SETTING UP AND REVIEWING CART ASSIGNEES

Some organizations set up a role that allows the user to shop, then assign a cart to another individual (user or approval) for submission and processing. These users are commonly referred to as **shoppers**. Shoppers simply add items to their cart, but are not required to enter detailed information about the requisition.

Two common scenarios for when a Shopper role is used by an organization are described below:

- **Shopping only user** – An organization wants to limit the number of users that need to be trained and set up in their ERP system. Therefore, the majority of users are set up as “shoppers” and orders are assigned to a “requisitioner” who is set up in the ERP system. This scenario is also helpful for users that may not be knowledgeable of accounting information, ship to details, etc.
- **Department/Lab usage** – In this scenario, users shop and fill a shopping cart, then assign the cart to a single individual in the department or lab for submission – i.e. –representing the “first” level of approval.

For users who are set up as shoppers, they are required to populate very little information in their profile. The two important parts of their profile to update include their basic info (phone, email, etc) and Cart Assignees, which is detailed below.

In some cases, an administrator will set up the assignees for a shopper. In order for a user to select his or her assignees, including the preferred assigned, he must have the **Edit My Profile** and **Edit User's Cart Assignees** permission enabled.

Please refer to the concept: Assigning a Cart **on page 103** and **the exercise:** Assigning a Cart to a Requisitioner **on page 105** for more information.

Step by Step

The goal is for an end-user to set up his/her up cart assignees and define a preferred assignee. The exercise below assumes that a user is a shopper and CANNOT place requisitions in the system.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Review and update a user's cart assignee list:
 - a. Select the **Purchasing** tab, then select the **Cart Assignees** sub-tab. Any previously assigned assignees are listed.
 - b. To add a user as a cart assignee, click the **Add Assignees** button at the top of the screen.
 - c. Perform a user search to locate the username for the desired cart assignees. Only those users with the **Prepare Req for Another** user permission will be listed as an option.
 - d. When the desired assignee has been found, click the **Select** button next to the Cart Assignee's name, and click **Choose Selected User**. The assignee's name displays in the list.
 - e. From the list, click the **Preferred** button to make the user the default assignee for your orders.
 - f. Repeat steps 2b – 2d to add additional assignees to your list.

SETTING UP BILL TO AND SHIP TO ADDRESSES

Note: This exercise is not applicable to Spend Director-only clients.

Billing and shipping information is required to place an order in SelectSite. Although address information can be entered each time an order is placed, it is recommended to set up billing and shipping information in the user profile to save time and provide consistency with each order.

Depending on your organization's setup, an administrator may set up user's address(es), users may select from a pre-defined list, or users select from a pre-defined list and add user-specific information (Attn:, room number, telephone number, etc).

There are two types of addresses that are user-defined for purchase orders:

- **Ship To:** The shipping address identifies where the supplier should ship the item(s). Some organizations have freeform lines in the ship to addresses, while others have a central receiving area and only require a single ship to address.

- **Bill To:** The billing address identifies where the supplier should send the bill for the item(s). In most cases, there is only one billing address, but in some cases, there are multiple billing addresses.

The exercise below assumes the ability to select from a list of pre-established addresses. Some organizations choose to set the site up so that addresses can only be set up by the administrator and cannot be modified by requisitioners. If this is the case, address information will be read-only.

Step by Step

The goal of this exercise is to add billing and shipping addresses in the profile. This information can later be assigned to an order/requisition through the Review page.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Select the **Purchasing** tab, then select the **Addresses** sub-tab. The **Ship To** tab displays.
3. To add a new address (typically the user's default address), press the **Select Addresses for Profile** button. Depending on the number of addresses available, a search interface or a drop-down box displays.
4. To select an address using the search interface, skip to the next step (5). If working from a drop-down list box, do the following:
 - a. Expand the **Select Address Template** drop-down box.
 - b. Select the desired address.
 - c. Review the address information and make any necessary changes or additions. Required fields are indicated in Bold. Oftentimes, you may need to enter freeform text such as Attention To, Building, and Room Number.

IMPORTANT:

An organization's business practice should dictate how addresses are selected and entered. Please contact your Purchasing department or Support team for recommendations regarding address selection and handling.

- d. Check the **Default** checkbox if this address is the desired default Ship To address.
 - e. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.
 - f. Skip to Step 6.
5. To select an address using the search interface, use the following steps:
 - a. Enter text to search for the **Nickname** or **Address** fields. Determine the desired number of results for display by selecting a number from the **Results Per Page** drop-down box.
 - b. Press the **Search** button.
 - c. Select the radio button adjacent to the address desired for the current user ID.
 - d. Review the information and make any necessary changes. Oftentimes this includes entering freeform text such as attention to, building, and/or room number.
 - e. Check the **Default** checkbox if this address is the desired default Ship To address.
 - f. Press the **Save** button to save changes. The selected address displays in the Shipping Addresses list box.
 6. Press the **Delete** button to remove an address if the address was selected in error or if it is no longer needed.
 7. Repeat the steps above to add any additional shipping addresses to the profile.
 8. Select the **Bill To** tab.
 9. Select a Bill To address by pressing the **Select Addresses for Profile** button. Follow the steps above to select a billing address. Note: The only difference in the steps is that billing addresses are being set

up instead of shipping. Also, the format of Bill To and Ship To addresses may vary. For example, Bill To addresses typically do not have freeform rows.

10. When finished, there should be at least one Bill To and one Ship To address set up in the profile. It is recommended that one of each as marked as the default address. This will save time when checking out.

SETTING UP CUSTOM FIELD VALUES

Custom fields are used to track customer-specific information such as department numbers, accounting codes, employee numbers, work codes, requisition type, and more. Accounting-related custom fields are used for accounts payable reconciliation and integration, GL updates, purchasing department processing, and similar functions.

Custom fields are used in SelectSite for a number of different reasons. They can hold information that is passed to another system (such as the organization's financial system), or they can track additional order details required by an organization such as buyer information.

Although custom field values can be selected or entered each time an order is placed, it is recommended to set up custom field values that are used repeatedly for ordering in the user profile. The time spent building custom field values in a profile is quickly made up by enabling quicker checkout by using default values.

Step by Step

The goal of this exercise is to review a user's permissions for custom field access and add custom field values to the user profile.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Review the user's custom field permissions:
 - a. Select the **Permissions** tab, then select the **Custom Fields Permissions** sub-tab. This section of the user profile defines whether or not a custom field is visible for a user, along with how the custom field functions (freeform entry, user defined list, etc). The following permissions display for each active custom field in SelectSite:
 - i) **View Personal List** – Allows view access to custom fields in the profile. Users will also see an Edit button that allows them to view or edit (depending on other Custom Field permissions) the list of custom field values.
 - ii) **Edit Personal List** – Provides the same functionality as View Personal List PLUS the ability to add new values to the profile for the custom field. Depending on how the custom field is set up, this may be a selection from a pre-defined list (*requires View Organization Values Permission*) or by creating a free-form value (*requires Create Values for Personal list Permission*).
 - iii) **View Organization Values** – Allows the searching and selection of organization-defined values for the custom field. This permission is used in conjunction with the Edit Personal List permission.
 - iv) **Create Values for Personal List** – Provides the ability to create values (stored in the profile) for the custom field. This permission is used in conjunction with the Edit Personal List permission.

Example # 1: For this custom field, the user selects from a list of admin-defined values to enter the account for a line item.

Account	
View Personal List	✓
Edit Personal List	✓
View Organization Values	✓
Create Values for Personal List	✗

Example # 2: The user will not see this custom field on the purchase requisition/purchase order. He will not be able to see or change any information related to this field. The buyer field is only viewable by the Purchasing Department.

Buyer	
View Personal List	X
Edit Personal List	X
View Organization Values	X
Create Values for Personal List	X

3. Review and set up custom field values: Select the **Purchasing** tab, then select the **Custom Fields** sub-tab. This is the area of the profile where custom field values can be reviewed and updated. The sub-tabs displayed represent the location on the screen in which the custom field displays.
4. Locate the custom field you would like to add or modify the values for. Select the **Edit** button on that custom field's line. A yellow highlighted error message displays if no default value has been assigned for that custom field. In some cases, it is recommended to define a default, but there are exceptions.
5. Review any custom field values currently listed in your profile for the custom field. Values may have been passed down by the assigned Role.
6. Select the **Create New Value** button to add a new custom field value or to select from a list of administrative values (this depends on the permissions discussed earlier in this exercise).
7. Select any available organization value from the **Values** list box, by enabling the checkbox(es).
8. Select the **Add Values** button once the desired custom field values are selected. The value(s) display in the Value/Description custom field value list box.
9. Modify selected custom field values using the following steps:
 - a. Select the desired custom field value from the Value/Description custom field box.
 - b. Modify the **Value** or **Description**, given the appropriate permissions.
 - c. Select the **Default** checkbox if this custom field value is the desired default value.
 - d. Press the **Save** button to save all changes.
 - e. Press the **Remove** button to remove the custom field value from the list box.

SEARCH TIPS:

To search for organization defined values, use the Search button to retrieve a full list of values. A partial search can also be executed - part of the word or words you are searching for plus the asterisk (*) to perform a wildcard search.

10. Create custom fields manually, if the appropriate permissions have been granted, using the following steps:
 - a. Select the **Create New Value** button.
 - b. Enter a custom field value in the **Value** text box under the New Value section.
 - c. Enter a custom field description in the **Description** text box under the New Value section.
 - d. Select the **Default** checkbox if this is the desired default custom field value.
 - e. Press the **Save** button to save all changes.
11. Select the **Close** button to complete editing the custom field values. Once this is done, other custom fields can be selected for edits.

NOTE:

Custom field values can be set up at the role level. Changes to a user profile override any role-level setup.

DETERMINING EMAIL PREFERENCES

The Email Preferences screen is used to determine when and why the user will receive email notifications from the system. This information is NOT inherited from the role, so this must be set up on a per-user basis. Although notification can be enabled for each step in the process (submittal, review, approval, etc.), it is suggested that notifications be sent minimally when problems arise, such as line item rejection.

Step by Step

The goal of this exercise is to enable email notification for a user.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Select the **User Settings** tab, then select the **Email Preferences** sub-tab. The notification options listed are dependent on a user's permissions.
3. Determine in which cases you would like to receive an email. It is recommended to enable email notifications for rejections. To enable a notification, click on the checkbox.

MORE INFO:

Click on the name of the email notification to display Help, providing a full explanation of why and when the notification type is sent.

4. Press the **Save** button to save changes. Emails will be sent immediately (as appropriate).

REVIEW USER PROFILE HISTORY

The User Profile History provides an audit trail that tracks changes made to a user's profile. This is an information-only screen that provides detailed information about potentially important changes such as changes to roles and permissions, approvers, addresses, and more. The History screens are used to track changes, additions, and deletions.

Step by Step

To view all changes, additions, and deletions related to a user's profile.

5. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
6. Select the **History**. The following screen displays.

User Settings

Purchasing

Permissions

History

+ Click to filter history

Export CSV

History

Results per page 20

Records Found: 2

Page 1 of 1

Date	User	Action	Section	Selection	Field	Old Value	New Value
7/26/2006 10:47 AM	Luke Smith	Role Added	Roles	Requestor			
7/26/2006 10:47 AM	Luke Smith	Role Added	Roles	Approver			

7. Review the user profile history. The columns in the history table are described below:
 - **Date** - The date and time a change was saved.
 - **User** - The user who made the change.

- **Action** - The type of action the user took. Typically either creating or modifying information for the user.
 - **Section** – The section of the user profile that the changes took place.
 - **Selection** – The area or value added. This field is not always applicable to a change.
 - **Field** - The specific field the user modified. This field is not always applicable to a change.
 - **Old Value** - The value prior to the change. This field is not always applicable to a change.
 - **New Value** - The value saved by the change. This field is not always applicable to a change.
8. The History tab provides the ability to filter the audit trail based on certain criteria. To filter the data displayed in the table:
- Click the **+** sign at the top of the screen

+ Click to filter history ?

- Enter the appropriate filter criteria to determine what historical data displays, then click **Apply**. The historical data updates immediately.

SETTING UP CREDIT CARD INFORMATION

Some organizations use credit cards as a method of payment in addition to purchase order numbers. If your organization uses credit cards as a possible payment method and the *Edit Credit Card* permission is turned on for the user, the Payment Options section of the profile is available. From this section of the profile, you can set up credit card information so that it does not have to be entered for each order. The credit card number entered is encrypted, meaning it cannot be viewed after entered, but the system retains the information and can validate against the number. Information regarding credit card setup:

- Multiple Credit Cards can be set up. For each card set up, a card nickname, the cardholder name, the number, and the expiration date must all be entered. The three-digit code on the back of the card may also be required by your organization.
- By selecting a card as the default, all lines of an order will be assigned to the credit card. If a default is not selected, each line must be assigned individually in the shopping cart.
- Note: Credit Cards can only be used with items from those suppliers that have PCard set up as an ordering method.

Step by Step

The goal of this exercise is to set up one or more credit card numbers for P-Card payment.

1. Navigate to the profile screen. Refer to View and Update the Profile on page 30 for more information.
2. Select the **Purchasing** tab, then select the **Payment Options** sub-tab. Any card numbers that have been set up display on the left side of the screen.
3. Click the **Add a Card** button to add a new credit card to your profile.
4. Enter the information for the credit card. If the card number is not valid, you will be notified (as shown in the graphic below).

The screenshot shows a web form titled "Card Details" with a help icon (?). The form contains the following fields and values:

- Nickname:** my p-card
- Cardholder Name:** Andrew Banks
- Card Number:** 1234123412341234. Below the input field, a red error message reads: "❌ Card Number is invalid." The entire Card Number field and its error message are highlighted with a yellow rectangle.
- Card Security Code:** 567
- Expiration Date:** 1 (month) / 2010 (year)
- Default:** ☒

At the bottom of the form are two buttons: "Save" (orange) and "Remove" (grey).

5. Description of the fields on the screen:
 - a. **Nickname** – This is an arbitrary name that identifies the card. For example, if you are someone that orders for multiple people you may have one called “Jim’s Card” and another called “Beth’s Card.” When selecting a credit card for use with a purchase order, you select from the nicknames assigned.
 - b. **Cardholder Name** – This is the exact name that displays on the credit card. This is important that it matches the actual card because the supplier will use this for card validation.
 - c. **Card Number** – The number on the card. This number will be initially validated by SelectSite and final verification by the supplier.
 - d. **Card Security Code** – The Card Security Code (CSC) is the 3 or 4 digit number on a credit card that is meant to enhance the security of card number. The number is not part of the card number itself and is only printed on the physical credit card. The purpose is to ensure that the person attempting to use the card has physical possession of the card as well. The Card Security Code may be required as part of the supplier's configuration.
 - e. **Expiration Date** – The month and year that the card expires. The expiration date must be past the current date in order to use the card.
 - f. **Default** – This checkbox is used to identify the default card for the user. Only one credit card can be marked as the default.
6. Click **Save** to save the credit card information. After saving your information, it will look similar to the example below.

The screenshot shows the "Card Details" form after saving. The fields and values are as follows:

- Nickname:** My P-Card
- Cardholder Name:** Andrew Banks
- Card Number:** XXXXXXXXXXXXXXX1111
- Card Security Code:** XXX
- Expiration Date:** 1 (month) / 2007 (year)
- Default:** ☒

The "Save" button is now orange, and the "Remove" button is grey.

7. Turn on the **Apply the Default Card** checkbox to enable the default card.

SEARCHING FOR ITEMS

Lesson 4: SEARCH METHODS

The purpose of this lesson is to provide instructions on the various ways in which you can search for items in SelectSite. Together, these search methods provide flexible, easy-to-use ways to find products to add to the Shopping Cart for purchase.

Key Concepts

SEARCHING AND SHOPPING TECHNIQUES

SelectSite provides several methods to find the appropriate items for requisitioning. In the screenshot below, a few of these methods are shown.

The screenshot displays the SelectSite interface. At the top, the 'Purchasing Showcase' section features 'Featured Suppliers' including Dell (10% off Laptops), Fisher Scientific, VWR International (Lab Supplies), and QIAGEN, Inc. (DNA/RNA Best Brand). Below this, 'Featured Services' include Bid Request Form and Catered Lunch. The main navigation bar includes 'Favorites', 'Quick Order', 'Product Search' (selected), and 'Forms'. The 'All Category Search' section on the left shows 'Categories' with 'All' selected and 'Non-Catalog Item' as an option. The central search area contains a text input field for search terms, a 'Search' button, and checkboxes for 'Select to search for items that have all keywords entered' and 'Include similar terms'. Below the search area, there are sections for 'Other Searches' (Browse by: Supplier, Category, Contracts, chemicals) and 'Punchout' (VWR International, Fisher Scientific, BOIS, Dell).

Depending on the information known about the required product or service, one or more of the following shopping methods can be used to search for the product or service:

- **Standard Search** – a simple search similar to a “Google” search, where a word, phrase or keywords are entered into a single textbox for searching. This is shown in the example above (Enter search terms, ...)
- **Shop by Showcased Suppliers** – An organization can highlight, or “showcase” suppliers that are either frequently used, recommended, or offer a good discount. These suppliers are listed in the Purchasing Showcase box above Product Search.

- **Search by Vertical** – search results can be filtered to a specific product vertical/commodity to reduce the number of products found. In the example above, the verticals are collapsed and “All” is showing.
- **Advanced Search (Search by Keyword)** – product description, product category, supplier name, manufacturer name, catalog number, manufacturer's number and other key product descriptors can be used to find the required product or service.
- **Browse by Supplier** – filter results to those from a specific supplier.
- **Browse by Category** –view all items from all suppliers for a specific category (commodity).
- **Browse Contracts** – this option is available to those clients who have purchased the Contract Manager module. This option allows you to search for items or keywords for the contracts managed in the system.
- **Punchout Shopping** – search an external supplier's website, to find the required products for purchasing. Items are returned to the SelectSite shopping cart for processing.
- **Chemical Structure Search** –commercially available chemical products are found using chemical structures and sub-structures drawn by the user.
- **Antibody Resource** – parametrically search for antibody products by selecting host, species reactivity and other product attributes.
- **Quick Order** – if the exact catalog number is entered (supplier or manufacturer), Quick Order automatically adds the item to the cart without requiring the user to add the item manually.
- **Favorites** – store frequently ordered and preferred items in an organized personal manner for fast retrieval and requisitioning.
- **Product Comparison** –view side-by-side comparison of similar items to compare item details to make more informed.
- **Forms** – The non-catalog form or a specific form such as a “Services Form” is used to freeform a request for an item or service.

PUNCH OUT AND HOSTED CATALOGS

A catalog is a supplier's product offering. There are two types of catalog hosted and punch out. These are described below.

- **Hosted Catalog** –In simplest terms, a hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When a product search is performed in SelectSite, the products in all of the hosted catalogs are searched. Hosted catalog search results contain product information from all suppliers depending on the search criteria entered by the user.
- **Punch out Catalogs** – Punch-out catalogs are integrated external links to a supplier's web-based catalog. The user exits SelectSite to search and select products from a supplier's web catalog, then returns the items to the SelectSite shopping cart. The selected items are then submitted through the standard requisition/order process.

SEARCH AT A GLANCE

In SelectSite, there are many different options and features available for product searching. While it is **highly recommended** to review all the information in this document to gain the highest level of understanding around search, we realize this is not always possible. Here are some recommended alternatives:

Quick Learning...If you have 10 minutes, do the following:

1. Read the Three Steps to Quality Search Results found below. This will provide a foundation for searching.
2. Read Searching Recommendations on page 57. This is one page of helpful hints and advice around successful searching.

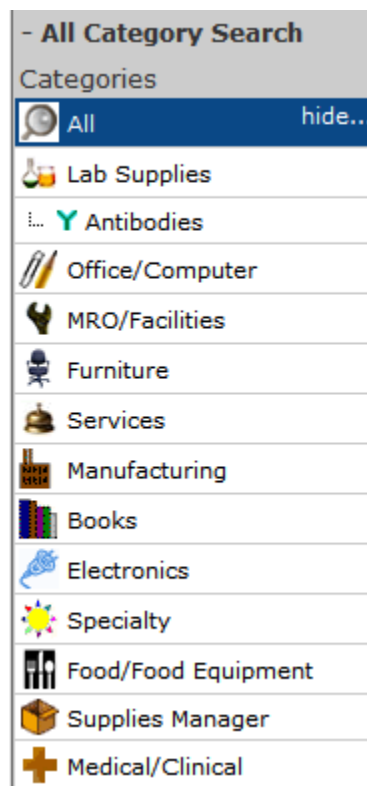
Quickest Learning... If you have 5 minutes, do the following:

1. Read the Three Steps to Quality Search Results found below. If you only search one way, this is the way to do it!

Three Steps to Quality Search Results

The following steps provide a recommended strategy for locating products and services through SelectSite Product Search.

1. **Select a Category and use Advanced Search.**
 - Select the appropriate **category** from the left side of the screen. You may have to click the **more...** link to view all available categories. The search works quite differently within each category, therefore the results are typically much better when a category is specified (versus an All Categories search).
 - If not already open, click the **advanced search options...** link to open Advanced Search. Populate one of more of the search criteria fields, then click **Search** to view your results.
2. If you cannot find your item from step # 1, **select another category** if you are unsure which category the item belongs in. For example, if you are searching for *office shelving* and originally searched in **Office/Computer**, you may want to try **Furniture** as a second category search. Keep in mind, the category assignment is determined by the supplier and is not guaranteed for accuracy.
3. If you cannot find your item through a category-specific search, try the **All Category Search** or enable the **Include Similar Terms** checkbox to expand your search results.
NOTE: It is important that you choose ONE of these options, not both.



WHAT'S ON THE SCREEN? UNDERSTANDING PRODUCT SEARCH

In order to return the highest quality search results, it is important to understand the different options available through the Product Search. Each of the "parts" of the Product Search screen is described on the following pages.

Below is a graphic of the Product Search screen, in two modes. Refer to this graphic when reading through the descriptions.

The image displays two screenshots of the Product Search interface, with numbered callouts (1-8) identifying key components.

Top Screenshot (Standard Search Mode):

- 1:** Points to the **Product Search** tab in the top navigation bar.
- 2:** Points to the search input field labeled "Enter search terms, e.g., supplier name, catalog no., product name, CAS#, etc."
- 3:** Points to the **Categories** sidebar on the left, which includes a "Non-Catalog Item" option.
- 4:** Points to the **Browse by** section, which includes links for Supplier, Category, Contracts, and chemicals.
- 5:** Points to the **Search** button.
- 6:** Points to the **Punchout** section, which displays logos for VWR International Lab Supplies, Fisher Scientific, BOIS (with a red X), and Dell (with "10% off Laptops").

Bottom Screenshot (Advanced Search Mode):

- 7:** Points to the **hide advanced search** link in the top right corner.
- 8:** Points to the **Products per page** dropdown menu, which is currently set to 20.

Advanced Search Options (Visible in Bottom Screenshot):

- Product Description:** Includes checkboxes for "must include the words", "include any of the words", "include exact phrase", and "exclude the words".
- Supplier Name**
- Manufacturer Name**
- Catalog No. (SKU)**
- CB Multivalue**
- CBAttribute2**
- CBTestingAttribute**
- Supply Item Categories**
- Visibility:** Includes a "Viewable" dropdown.
- Include similar terms:** Includes a checked checkbox.

1: Product Search Tab

The **Product Search Tab** is accessed to search for items from hosted catalog suppliers. All activity in this document focuses on the information found in this part of the application. This tab can be accessed three different ways:

- Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the **Product Search** tab.
- From the **home page** navigation tab, select the **Product Search** tab.
- From the **search** navigation tab, select the **Product Search** tab.

2: Basic Search

There are two primary ways that a user can search for a product in SelectSite. A simple, or **basic search** is provided that provides a "google-like" experience, which is shown in the graphic above as item # 2. Although this search technique may seem the quickest, it may not produce the desired results. The basic search searches across all verticals, which is not recommended as the first step in searching for items. Refer to Searching Recommendations on page 57 to learn more about using this search technique.


A checkbox displays below the keyword entry field. This checkbox (**Select to search for items that have all keywords entered**), allows users to choose how exact the keyword search will perform. If this checkbox is turned off, ALL keywords must be present for a 100% match. If the checkbox is enabled, the search is less restrictive and the "include any of the word" logic is used.

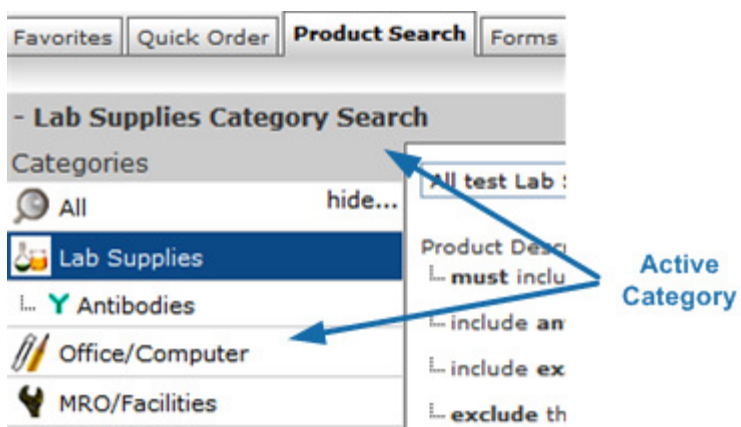
Remembering your preferences:

By default, the Basic Search displays the first time Product Search is opened. After that, SelectSite remembers the user's last search settings.

3: Categories

Many different types of items can be ordered through SelectSite – ranging from chemicals for the lab, furniture for the office, and services from vendors. To help users find the item or service requested, category-specific searches are available. On the left side of the Product Search tab, your organization's available categories are listed, along with an **All** option, which performs a search across all verticals. Below are a few key details about categories:

- Searching by category helps reduce the number of products from appearing in Search Results by filtering out those not in the selected vertical. When shopping by category – or product type –the data being searched is limited.
- The list of categories available varies by organization depending on the suppliers and items enabled. For example, if only office product suppliers are used, only the Office Products vertical appears. As other types of products (and suppliers) are added, more verticals are displayed on the screen.
-  - To view the full list of categories, click the **more...** link to the right of the All category search. Click the **hide...** link to remove the category list from the screen.
- The active category is highlighted and listed at the top of the screen, as shown below:



- SciQuest recommends performing category-specific searches as a first step, then moving to the All Category Search if the item is not found. The search works quite differently within each category, therefore the results are typically much better when a vertical, or category, is specified.
- Below is a description of each of the product categories available in the system.

Category	Description and Examples
Lab Supplies	<p>This category includes products used in various research environments. Examples include items such as these and more:</p> <ul style="list-style-type: none"> ▪ reagents (used in synthesis/analysis, cell/molecular biology etc), ▪ glassware, ▪ analytical equipment, meters, and supplies ▪ safety and cleaning supplies
Office	<p>This category includes office supplies and consumables such as:</p> <ul style="list-style-type: none"> ▪ files and folders ▪ desk supplies ▪ packing and shipping supplies ▪ paper and printing supplies ▪ writing instruments ▪ blank media
MRO/Facilities	<p>This category includes products related to maintenance repair and operations (i.e. – facility management). Examples include:</p> <ul style="list-style-type: none"> ▪ electrical, lighting, and air conditioning supplies ▪ plumbing supplies ▪ tools ▪ hardware ▪ lubrication ▪ janitorial/ground maintenance supplies

Category	Description and Examples
Furniture	<p>This vertical includes all furniture products such as:</p> <ul style="list-style-type: none"> ▪ Desks and tables ▪ Workstations ▪ Cabinets ▪ Chairs ▪ Shelving ▪ Office Furnishings such as lamps, etc
Services	<p>This vertical includes all service-related requests (i.e. – instead of product/item requests, these are service requests). Service examples include:</p> <ul style="list-style-type: none"> ▪ Lab services ▪ Office and project management services ▪ Legal services ▪ Training services ▪ Catering services ▪ Manufacturing services
Manufacturing/Engineering	<p>This category typically includes major equipment purchases such:</p> <ul style="list-style-type: none"> ▪ Construction equipment ▪ HVAC equipment ▪ Water treatment equipment ▪ Pharmaceutical equipment
Books and Publications	<p>This category includes hardcopy documentation spanning all topics and interests. Items in this category include:</p> <ul style="list-style-type: none"> ▪ Books ▪ Manuals ▪ Reference Publications ▪ Magazines
Electronics/IT/AV	<p>This category includes all electronic or computer-related equipment including:</p> <ul style="list-style-type: none"> ▪ computer hardware/software ▪ computer accessories ▪ printers/copiers/scanners ▪ communication equipment/accessories ▪ AV equipment/accessories ▪ networking equipment/accessories
Specialty	<p>This category includes miscellaneous products such as:</p> <ul style="list-style-type: none"> ▪ Sporting equipment and supplies ▪ Clothing materials ▪ Hobby and entertainment related items ▪ Teaching and classroom aids ▪ Musical instruments ▪ Toys and games

Category	Description and Examples
Food/Food Equipment	<p>This category includes all food-related items such as:</p> <ul style="list-style-type: none"> ▪ Commercial food preparation, storage, and serving equipment ▪ Food consumables and supplies ▪ Food items (meats, vegetables, juices, beverages, snacks, etc) ▪ kitchen equipment and utensils
Medical / Clinical Supplies	<p>This category includes medical, surgical, clinical, and dental products such as:</p> <ul style="list-style-type: none"> ▪ gauze, needles ▪ dental equipment ▪ hospital equipment <p>NOTE: The items in this vertical were previously in the Lab Supplies vertical.</p>

4: Include Similar Terms Checkbox

Include Similar Terms checkbox. If the exact spelling is not known or only partial search terms are known, select this box. The search engine finds products containing terms that are similar to those entered. Selecting/deselecting this box is remembered for future searches. There are times when it is not recommended to use this checkbox, which are discussed in this document.

5: Search Button

After the appropriate search options are selected, including the category and criteria, click the Search button to generate the search results, which display at the bottom of the screen.

6: Basic and Advanced Search Options

Use the links shown in the graphic above in item # 6 to move between Basic and Advanced Search. It is recommended to use advanced search AND select a specific category whenever possible.

7: Search Criteria Options

Proper usage of the search criteria fields makes a huge difference in terms of the quality of search results. Users should take the time to understand how each of these fields work.

In addition to the fields listed in the following table, organizations can set up specific attributes that users are allowed to search against. These are called **custom catalog attributes** and allow shoppers to search for specific types of items – such as discounted items, items that are on sale, or search by internal IDs.

AVAILABLE FIELDS:

The search criteria fields available on the screen vary based on the category selected. For example, CAS is only available for Lab searches.

Search Criteria Field	Description
must include the words	<p>Only products containing ALL the words entered in this field are returned in search results. The words do not need to be in the same order as listed, but all words must be found in the one or more of the following fields, which are provided by the supplier:</p> <ul style="list-style-type: none"> ▪ Alternate Name ▪ Alternate Part Numbers ▪ CAS Number ▪ Category ▪ Client Catalog Number ▪ Color ▪ Common Name ▪ Description ▪ Manufacturer Name ▪ Manufacturer Part Number ▪ MDL Number ▪ Molecular Formula ▪ Part Number ▪ Radionuclide ▪ Searchable Keywords ▪ Supplier ▪ Packaging UOM ▪ Product Size ▪ System Packaging ▪ System Size ▪ UPC
include any of the words	<p>Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one. Keep in mind, the search results will not be as targeted as using the <i>must include the words</i> field.</p> <p>Refer to the list in <i>must include the words</i> description for a full list of fields searched when using this search criteria option.</p>
include exact phrase	<p>Products containing the exact words (including spaces and punctuation) in the ordered entered are returned. This is a very powerful search strategy if you know the precise way in which a supplier presents its information. If you are unsure – and looking for results from multiple suppliers - it is recommended to use <i>must include the words</i> option instead. For example, Large Gloves will find products with <i>Large Gloves</i> in the product description but will not find <i>Gloves, Large</i>.</p> <p>Refer to the list in <i>must include the words</i> description for a full list of fields searched when using this search criteria option.</p>
exclude the words	<p>Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function. For example, you may be looking for all glove options that are not small or medium. You could enter <u>latex gloves</u> in the <i>must include the words</i> field and <u>small medium</u> in the <i>exclude the words</i> field.</p> <p>Refer to the list in <i>must include the words</i> description for a full list of fields searched when using this search criteria option.</p>
Supplier Name	<p>Enter the supplier's name in this field to limit results to the entered supplier. If the exact spelling is unknown, or a partial supplier name is used, the <i>Include similar terms</i> checkbox should be checked. Enter multiple supplier names to limit results to a set of certain suppliers.</p> <p>At this time, both the manufacturer and supplier fields are searched using the Supplier Name search option. This will change with SelectSite 7.3 and only the supplier field will be searched.</p>

Search Criteria Field	Description
Manufacturer Name	<p>To find products from a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to SciQuest. If the exact spelling is unknown, or a partial manufacturer name is used, the <i>Include similar terms</i> checkbox should be checked. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.</p> <p>In the situation where a supplier represents multiple suppliers – i.e. – a distributorship – you should enter the original supplier in the manufacturer field.</p>
Catalog No. (SKU)	<p>Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributors SKU or the manufacturer SKU. To search for multiple catalog numbers, enter them separated by spaces.</p> <p>For best results, the entire SKU should be entered. If the whole SKU is not known, use one of the keyword searches, e.g., must include. Or, select the <i>Include similar terms</i> check box, and include the known portion of the SKU.</p> <p>The Catalog # and Production Description fields are searched when using this search criteria option.</p>
Product Size	<p>Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL. This is available only in the Lab Supplies category.</p>
CAS No.	<p>This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. Note: The entered CAS No. is checksum validated to reduce errors.</p>
Visibility	<p>The visibility option is only available to administrators with the Catalog Management permission. SelectSite allows administrators to make specific hosted items viewable or not viewable by standard requisitioners. This feature provides complete, detailed control over what items can be ordered by what supplier for hosted items. This search option allows the administrator to view only the items that can be seen by end users or ALL items (i.e. – non-viewable items). When a search is performed you will see ALL items from the supplier and if it is marked as not viewable for requisitioners, it will be indicated.</p>

8: Products per Page

The **Products per Page** selection determines the number of items display per page in the search results. By default, the setting is 20, but can be easily changes and will be remembered between searches by the system. Oftentimes, users will request 50 or more items per page to allow for comparison shopping.

UNDERSTANDING SEARCH RESULTS

Search results display when performing searches in SelectSite. The actual contents of the search – or result set – is determined by how the Product Search page is used (detailed earlier in this document). The purpose of this section of the document is to provide general information about usage and formatting of the search results.

The graphic below provides a sample of search results that displays after search criteria is entered.

Results for: **+glass +beaker**
show product details

Products per page: 20 Products found: 5 Page 1 of 1 legend ?

Weight	Supplier	Category	Catalog #	Product Description	UOM	Product Size	Price	Quantity	Add to Cart	Select
81	Fisher Scientific	Beakers	NC9024842	150 MI Glass Fleaker	EA		33.57 USD	1		<input type="checkbox"/>
							check availability...			
81	Fisher Scientific	Beakers	NC9222031	Glass Beakers/12pk	PK		49.00 USD	1		<input type="checkbox"/>
							check availability...			
81	Fisher Scientific	Extraction Tubes	NC9061575	Glass Column 30/pk	PK		138.70 USD	1		<input type="checkbox"/>
							check availability...			
81	Fisher Scientific	Specialty Organic Chemicals	NC9156161	N-1-Naphthylethylenediamine Dihydrochloride, For Nitrogen Dioxide Determination ASTM D-1607, Glass Container 25 GR Formula Weight: 259.18 Baker Analyzed ACS , CAS: (1465-25-4)	EA	25g	150.10 USD	1		<input type="checkbox"/>
							check availability...			
19	Fisher Scientific	Specialty Organic Chemicals	NC9426154	Potassium Hydroxide (0.100 N/IPA) (Class: 3, UN2924, Pkg Grp: II, Flammable Liquid, Corrosive, n.o.s, Contains: Isopropanol and Potassium Hydroxide)	EA		39.55 USD	1		<input type="checkbox"/>
							check availability...			

The Order of Search Results

A common question is what determines the order in which products are returned in search results? There are numerous factors that dictate the order in which products are returned within Search Results. The search engine determines the initial sort. Supplier and Category preferences, if used, determine the final listing.

The search engine finds all the products that should be considered for search results. Products with the greatest number of matching words are ranked higher than those with fewer. For example, if four words were entered in to the **include any of the words** field, the product containing all four are ranked higher than those containing three.

The weight calculated by the search engine is the primary factor for determining the product order in search results. Products with the highest weight are presented first. Products with the second highest weight are returned second, and so forth. Products with the same weight are sorted alphabetically by supplier name. Products with the same weight and supplier have no predefined sort order.

Weighting and Categories: Weighting is only accurate for the category (vertical) that the item listed belongs to. This is why some weighting may seem illogical in the search results when the Search All Categories search option is selected.

How Preferences affect Search Results

Many organizations choose to use Supplier Preferences, Category Preferences, and Organization-specific attributes, which are both discussed in the Administrator Handbook. These functions influence the order in which products are returned through defined rankings







- Supplier preferences, which are assigned to specific suppliers, can be assigned a ranking between 1 and 10.
- Categories of products can also be assigned a preference level by supplier. For example, glassware products from VWR can have a category preference set to 1 to indicate VWR is the most preferred vendor for glassware items.

When performing a search, the search engine applies the following rules:

1. Products are first grouped and sorted by the search **engine weight**. The most relevant products to the search criteria entered/selected are returned at the top of search results.
2. Within each weighting group, products are grouped and sorted by **custom catalog attributes** (if applicable). Only those attributes marked to “Promote items in search results” will display at the top of the list.
3. Within each weighting group, products are grouped and sorted by category preference (if applicable). The products with the highest category preference are sorted to the top of each weighting group.
4. Within each category preference group, products are further grouped and sorted by supplier preference (if applicable). Products from suppliers with the highest preference are sorted to the top of each preferred category group.

Search Results Details and “How to’s”

Search Results display at the lower portion of the screen. Below are some detailed explanations for the Search Results user interface:

- **Product Sorting.** By default, the products presented are listed in the order described above (The Order of Search Results). In addition, products can be sorted by any column containing the  icon below the column name. Select  icon again to reverse the sort.
- **Filtering by Supplier or Category.** SelectSite allows you to sort the search results by supplier or category AND view only those items for a specific supplier or category. To filter by either of these, click the funnel icon at the top of the search results (**Category** ).
- **Icon Definitions.** Both products descriptions and supplier names may have icons next to them. The **Legend** link at the top and bottom of the Search Results launches a pop-up that explains each of the icons. Additionally, mouse-over text is available for icons to view their description.
- **Adding Items to Your Cart.** To add an item listed in Search Results to the shopping cart, enter the Quantity, then click the  button. To add multiple items to the cart, select the checkbox next to each item in the Select column, choose the Add To Current Cart option in the drop-down action menu (default), then click the  button. For more information, refer to Adding Items to the Cart on page 93. NOTE: Some organizations and some supplier support partial quantities for ordering of goods and services. For example, you can order 1.5 hrs of service from a consultant. If your site is set up in this manner, enter the whole or decimal number in the quantity field.
- **Adding Items to your Favorites.** You can also add items from your search results to your favorites. For more information, refer to Adding Favorite Items to your Cart on page 88.
- **Comparing Items in Search Results.** From the search results, product details can be compared for to determine which one should be ordered. Select the check box next to the products to be compared, choose the compare products option in the action pull-down, and click the  button. For more information, refer to

SEARCH TIPS:

The search engine weighting is the primary way in which items are sorted. The second method of sorting is category preference, and the final sorting method is based on supplier preference (supplier classes and preferences).

Using the Comparison Function on page 82.

Note: Additional actions may be available in the pull-down depending on the user's assigned permission.

- **Access Additional Pages.** To page through search results, use the arrow buttons or page entry field to go to a specific page of search results. This information is displayed above and below the search

results. 

SEARCHING RECOMMENDATIONS

The purpose of this section is to provide general recommendations for searching and background information on “how” the search engine works. Recommendations include:

- **Perform Category-specific searches.** It is recommended to select a category instead of the **All Category Search**. The search works quite differently within each category, therefore the results are typically much better when a vertical, or category, is specified. For more information, refer to Three Steps to Quality Search Results on page 47.
- **Understand the search criteria options.** It is imperative that you understand how each of the search fields work on the screen so that you can select the appropriate fields to use for your search. Refer to the What's on the Screen? Understanding Product Search on page 48 for more information.
- **When using the Basic search...** Using the Basic search AND enabling the include similar terms checkbox may result in random results, therefore is not recommended. The search engine performs a separate search for each category, evaluating the items in each category. What might be weighted high (98% for example) in one category might be much lower in another category (40%) due to the sheer number of items in each category.
- **Wildcards** such as asterisks (*) do not work and are not needed. The search engine does not use a “wildcard search,” meaning if you enter the word *air* in the keyword search you may not see airplane, but will probably see air conditioner. If the *include similar terms* option is enabled, the system will allow for some wrong characters to be entered, and possibly a single missing letter, and a match will be found. When the *include similar terms* option is disabled, the search is more strict, and up to four letters on either side of the search term will be searched and will possibly display in search results. For example *glove* finds *gloves*.
- **Abbreviations and acronyms** are not usually recognized unless provided by the supplier.
- **Understanding Weighting:** Weighting is only accurate for the category (vertical) that the item is found in. This is why some weighting may seem illogical for broad searches performed using the Search All Categories feature.
- **Do not overuse “Include Similar Terms.”** This feature is designed to work well in certain searching scenarios, but is not effective in others. This checkbox should not be enabled at all times. For more information about when to use and when not to use this feature, refer to How to Use Include Similar Terms on page 58.
- **Generally speaking, do not enter partial words.** The search engine looks at the number of words, not “how much” of the word matches the search criteria. For example, when performing a supplier search, entering *Sam* will not provide results from *SamCo*, but entering *SamCo* will provide results from *SamCo Unlimited*. The search engine looks more closely at words that match what is entered – not partial words. Another example – *corn* will not find *corning*. For best results, four (4) or more characters should be entered in the search criteria field.
- **Weighting is not affected by recurring word usage.** For example, if a supplier puts the word *Glove* three times in the product description and once in the Product Name, it will not increase its chances of displaying at the top of the list.
- **Your supplier data is a key factor in determining search results.** The search results ultimately depend on the number of items and suppliers enabled. As an administrator, make sure the “right” suppliers and “right” items are available to your end users or communicate to them otherwise. Here is an example of how varying supplier data affects search results: *123* is entered in the Catalog # field. In

the search results, an item with a Catalog # of 123456 may display on one site but not another – perhaps because there are more items that more closely match the criteria based on the number of items available.

- **SelectSite Remembers your Settings.** When using the search feature, many of your choices will be remembered by the system each time you login. The setting for the *Include similar terms* checkbox and the *number of results per page* are remembered. Additionally, your search terms are remembered when refining your search results.
- **The more information, the better.** Many users become frustrated due to the large number of results, but are not entering enough specific information to produce quality results. If you know the supplier or manufacturer, enter those details. If you know the size of the product, enter that. The more information you enter, higher quality results are produced.
- **Multiple Searches can be performed at once.** Multiple supplier names, manufacturer names, or catalog numbers can be entered into the appropriate search criteria field and searched simultaneously. When entering the values, separate each one with a space.
- **Try other search techniques.** If you cannot find your item through traditional product search (basic or advanced search), consider looking for the item using various other search techniques including Browse by Supplier, Browse by Category, Quick Search, and more. Other Ways for Users to Find Items on page 58 for more information.

HOW TO USE INCLUDE SIMILAR TERMS

The **Include Similar Terms** checkbox is a powerful tool if used properly. The purpose of this section is to provide guidance on when to use this checkbox. Keep in mind – the system will remember whether this option is enabled/disabled.

Include similar terms



Include Similar Terms is not a shortcut and should not always be used. By enabling this option, some of the sophisticated searching features are disabled because it is looking for such a broader search base.

When to use Include Similar Terms:

- If you do not know the spelling of the product description or supplier
- When performing Catalog # (SKU) searches. If the Include Similar Terms option is turned off when performing a Catalog # search, the search results are much more limited and must be exact. For example, if the option is turned off and you enter 123 into the Catalog # criteria field, the search engine will find all items with 123 as a separate token (123 456 or 556 123) but will not find 123456. Using the Include Similar Terms does not require “perfect” entry with punctuation. For example, you can leave out the dash between 556-556 and it will still find the item.
- If you do not find your item through a search performed with the option turned off. Use this as a second step for searching.

ADDITIONAL TIPS AND TRICKS FOR SEARCHING

The purpose of this section is to provide both administrators and requisitioners additional suggestions and ideas for finding items.

Other Ways for Users to Find Items


In addition to Product Search, SelectSite provides a number of other alternatives to find and locate the item or service you are interested in purchasing. Below is a summary of these options. For more information on using these search methods, refer to the exercises in this lesson.

- **Personal Favorites and Organization Favorites** – Items that may be ordered repeatedly should be added to your Personal Favorites. This option allows you to easily organize repeat purchases and quickly add items to your cart. Some organizations have also created Organization Favorites, representing frequently ordered items by your organization.

- **Copy to Cart.** If you have ordered an item previously and did not save it as a favorite, search for the item from PR or PO History. Once you open the requisition, choose **Copy to Cart**. This option provides a very convenient way to repeat an order. The item, and its corresponding information will be added to a new cart.
- **Browse by Supplier** – filter results to those from a specific supplier.
- **Browse by Category** –view all items from all suppliers for a specific category (commodity).
- **Browse Contracts** – this option is available to those clients who have purchased the Contract Manager module. This option allows you to search for items or keywords for the contracts managed in the system.
- **Punchout Shopping** – search an external supplier's website, to find the required products for purchasing. Items are returned to the SelectSite shopping cart for processing.
- **Chemical Resource** –commercially available chemical products are found using chemical structures and sub-structures drawn by the user.
- **Antibody Resource** – parametrically search for antibody products by selecting host, species reactivity and other product attributes.
- **Quick Order** – if the exact catalog number is entered (supplier or manufacturer), Quick Order automatically adds the item to the cart without requiring the user to add the item manually.
- **Favorites** – store frequently ordered and preferred items in an organized personal manner for fast retrieval and requisitioning.
- **Product Comparison** –view side-by-side comparison of similar items to compare item details to make more informed.
- **Non-Catalog ordering** –Use the non-catalog screen to enter details for items that cannot be found in hosted or punch-out catalogs. view side-by-side comparison of similar items to compare item details to make more informed.
- **Forms** – Organization-specific forms are created to track specific requests – such as services, catering, leases, change orders, and more.

RECOMMENDATIONS FOR ADMINISTRATORS

Administrators and Trainers can do a few things to assist their end users with product **Searching**. Some of these suggestions are listed below:

- **Create a cheat sheet** – Use the information in this document to create a quick guide for your end users. Make this document or pdf available from your Organization Message. Training links are highly recommended from the home page.
- **Train users with examples**- Using your suppliers and the data available to your users, provide real-world search examples in training. Show examples of how using the search criteria fields, include similar terms, and basic vs. advanced search make a huge difference in terms of search results.
- **Use Help** – Click the  button on the right side of the Product Search tab for a description of each of the search criteria options and fields. Additionally, you can click on most of the fields to access field-specific Help. It is also recommended that you add organization-specific tips to the Help to best guide your users. For example, if you want to educate your users on how to shop for items from a specific supplier, you can add this to the Help and everyone can view these tips.
- **Organization Favorites** – Create Organization Favorites for frequently ordered items or items that are recommended for purchase. For example, if you have a standard item for white 8 X 11 paper, add this to the Office Supplies org favorite folder. Users can select this item instead of searching for the “best” item to order. It is also important to educate your users about Organization Favorites during training.
- **Use the Terms and Conditions Popup for Tips and Tricks.** – During training, participants typically only absorb 60% of the information they are taught. In addition to standard ongoing training sessions, use the system to teach your users. SelectSite provides a popup window that displays at sign-in. This

pop up can be used for standard purposes— such as disclaimers and site usage agreement, but it can also be used to tell your users about cool new features or remind them of tips and tricks for searching. The users are forced to view the information presented to access the information and will not required to view it again until the administrator resets the function. Refer to the Advanced Admin Guide for more information on setting up Terms and Conditions.

- **Work w/ SQ and your suppliers if your users are still struggling-** Lastly, if you or your users are still struggling understanding the search results that are displayed or “why” you cannot find what you are looking for, contact SciQuest Customer Support for assistance

Exercises

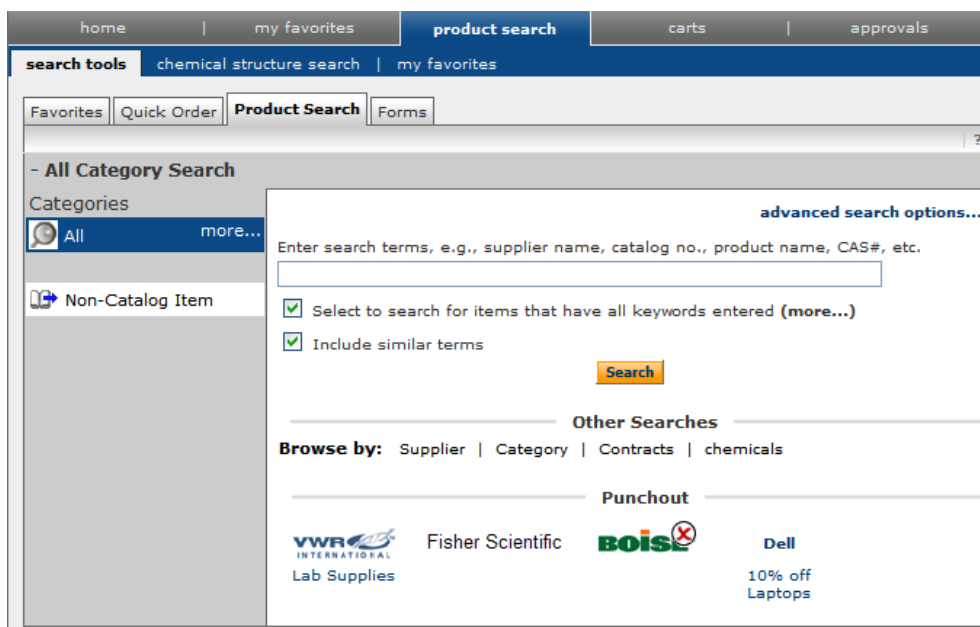
PERFORMING STANDARD SEARCHES

There are two main types of searches in SelectSite: standard search and advanced search. By default, the system performs standard, or simple searches. Standard search uses the All category, meaning it looks at items in all different verticals. Category-specific searches – such as furniture - are considered advanced searches.

Step by Step

The goal of this exercise is to demonstrate how to perform a standard (simple) search for an item in SelectSite.

1. Open the **Product Search** tab using one of the following methods:
 - a. Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the **Product Search** tab. (**Note:** The home page can vary by user, the default setting is described above.)
 - b. From the **home page** navigation tab, select the **Product Search** tab.
 - c. From the **search** navigation tab, select the **Product Search** tab.
2. By default, the standard search displays the first time Product Search is opened. After that, SelectSite remembers the user's last search setting (standard or advanced). An example of a standard search window is shown below.



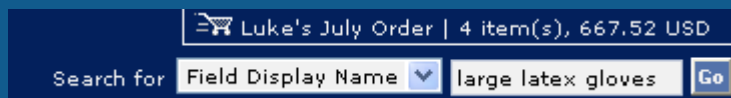
3. Enter the **keyword** or keywords you are searching for in the box. Keep in mind, the more information you enter, the more specific your search will be.

4. Click the **Include Similar Terms** to allow for misspellings and similar words in the search results. Note: Typically there are more search results with this option enabled.
5. The **Select to search for items that have all keywords entered** checkbox allows users to choose how exact the keyword search will perform. If this checkbox is turned off, ALL keywords must be present for a 100% match. If the checkbox is enabled, the search is less restrictive and the “include any of the word” logic is used.
6. Click the **Search** button to view search results.
7. Once the search results display, click the **show product details** link (above the table). Additional details for the items, including images (pictures), if available, display.

8. If the search results do not provide the information you need, perform an advanced search or refine your search, as discussed on page 80.

QUICK ENTRY BOX:

Standard searches can also be performed via the Quick Entry box in the upper right-hand corner of the screen. Choose Catalog keyword (as shown in the example below) or Catalog No., then click Go or hit Enter to quickly see the search results.



ADVANCED SEARCH BY VERTICAL

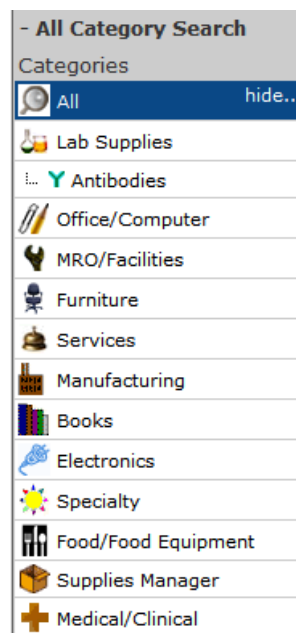
Searching by product vertical helps reduce the number of products from appearing in Search Results by filtering out those not in the selected vertical. When shopping by vertical – or *product type* – the data being searched is limited. For example, if a specific chemical is being searched, select the Lab Supplies vertical, as opposed to the Office Supplies or MRO vertical. Selection of one of the latter verticals will likely result in no products returned in Search Results.

The available verticals are found on the Product Search tab. The list of verticals available varies by organization depending on the suppliers and items enabled. For example, if only office product suppliers are used, only the Office Products vertical appears. As other types of products (and suppliers) are added, more verticals are displayed on the screen.

When a vertical is selected on the Product Search tab, the appropriate punch-out vendors are displayed at the bottom of the screen. The **All** vertical allows for searching across all verticals and suppliers at the same time. This option should be used if a product vertical is not known.

Step by Step

The goal of this exercise is to demonstrate how to maneuver between product verticals when performing a product search.



IMPORTANT:

The verticals available on your site may differ from the ones shown to the right, depending on the types of items available in your hosted catalogs.

1. Open the **Product Search** tab using one of the following methods:
 - a. Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the **Product Search** tab. (**Note:** The home page can vary by user, the default setting is described above.)
 - b. From the **home page** navigation tab, select the **Product Search** tab.

- c. From the **search** navigation tab, select the **Product Search** tab.
2. Once the **Product Search** tab is selected, the verticals display on the left side of the screen in the **Categories** section.
3. Select the vertical containing the product of interest. The active vertical is highlighted.

SEARCH TIP:

SelectSite remembers the last vertical searched and will set this as the default vertical the next time the Product Search tab is accessed. For example, if a search is performed in the Lab Supplies vertical, the Lab Supplies vertical remains active and is the default vertical the next time a search is performed.

4. Using the search criteria, enter **keywords** to find the desired item.
5. Click the **Include Similar Terms** to allow for misspellings and similar words in the search results. Note: Typically there are more search results with this option enabled.
6. Click **Search** to display search results.
7. To perform additional searches...
 - To perform the **same search in a different vertical**, simply select the new vertical. The values entered in the search criteria are preserved between verticals.
 - To perform a new search and to remove the current values, click on the **Product Search** tab. The search interface is reset (keywords are removed), but the vertical is the same as the last one selected.
8. To refine searches by category or supplier, refer to

ADVANCED SEARCH BY KEYWORD

The purpose of this exercise is to demonstrate how the search criteria fields are used and how they impact product search results. When keywords are entered into a search criteria field, SelectSite searches the products available in hosted catalogs to find the best matches. The various search fields filter Search Results to include only the desired products.

Keyword searching can be performed within any product vertical where hosted catalogs are available. The fields available vary depending on the type of item being searched. For example, although all verticals have the *include any of the words* field, you can only search by CAS #, which is an identifier specific to chemicals, in the Lab Supplies vertical.

NEED HELP?

Help on using each of the search fields is accessed by clicking on the search field name.

Note: If a product vertical only has punch-out suppliers, the search field interface is not available. Only the punch-out icons are shown.

Key Points for Searching

- Select the **ALL** category for searching all hosted categories simultaneously. This is not recommended unless the vertical for the desired product or service is not known. **Note:** SciQuest cross-categorizes several products between verticals as it makes sense, e.g., batteries may possibly be found in the Lab Supplies, Computer Products, MRO, and Office Products verticals.
- **Remembered Parameters**-The number of results per page and the selection of the **Include similar terms** check box is remembered between searches. Additionally, entered search terms are remembered as search category is changed when refining Search Results.
- **Include similar terms**-allows the search method to be switched between an exact search method (search for the precise words entered) and a search method that looks for terms that are similar to the ones entered in the search interface.
- **Multi-Searches**-multiple suppliers, manufacturers, or catalog numbers can be searched simultaneously to help limit search results. Use any of these search fields and separate the multiple values by a space. All products matching the entered values are returned in **Search Results**.
- For best results, four (4) or more characters should be entered in the search criteria field.

Step by Step

The goal of the exercise is to find the desired products using the search criteria fields available through Product Search.

1. Open **Product Search** and select the desired **vertical** from the column on the left side of the screen. For more information, refer to Advanced Search by Vertical on page 62.
2. Enter search tokens in the appropriate search field(s). An explanation of each of the fields is provided below.
 - a. **must include the words** - Only products including all the words entered in this field are returned in search results.
 - b. **include any of the words** - Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one.
 - c. **include exact phrase** - Products containing the exact words (including spaces and punctuation) in the ordered entered are returned.

- d. **exclude the words** - Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function.
 - e. **Supplier Name** - Enter the supplier's name in this field to limit results to the entered supplier. If the exact spelling is unknown, or a partial supplier name is used, the Include similar terms box should be checked. This field can also be left blank. Enter multiple supplier names to limit results to a set of certain suppliers.
 - f. **Manufacturer Name** - To find products produced by a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to SciQuest. If the exact spelling is unknown, or a partial manufacturer name is used, the Include similar terms box should be checked. This field can also be left blank. Enter multiple manufacturer names to limit results to a set of certain manufacturers.
 - g. **Catalog No. (SKU)** - Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributors SKU or the manufacturer SKU. To search for multiple catalog numbers, enter them separated by spaces.
For best results, the entire SKU should be entered. If the whole SKU is not known, use one of the keyword searches, e.g., must include. Or, select the Include similar terms check box, and include the known portion of the SKU.
 - h. **Product Size** - Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter 500 for units and select mL from the pull-down for product size = 500mL. This is available only in the Lab Supplies category.
 - i. **CAS No.** - This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses and dashes. (Any other characters are stripped.) The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. Note: The entered CAS No. is checksum validated to reduce errors.
 - j. **Include similar terms** - If the exact spelling or only partial search terms are known, select this box. The search engine finds products containing terms that are similar to those entered. Selecting/deselecting this box is remembered for future searches. Similar terms that include words that include the keywords entered, words that have one or more letters transposed, and words that include the keyword entered with any single character missing. **Note:** Use this option when exact searching does not yield the desired results.
 - k. **Products per page** - The number of product results per page can be set from the default of 20 up to 200. The values set here are remembered between searches.
3. After defining your criteria, click the **Search** button. The Search Results display at the bottom of the screen.

SEARCH TIPS:

Multiple search fields can be used to further filter Search Results. For more information refer to Refining Search Results on page 80.

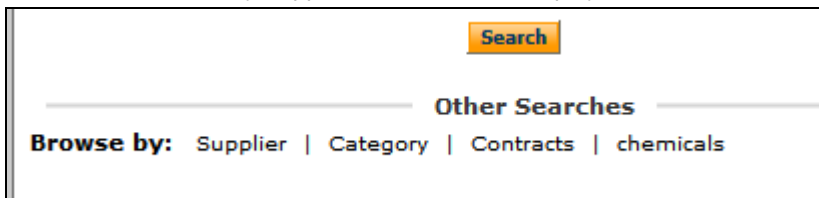
SEARCHING BY SUPPLIER

The Browse by Supplier functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by that supplier in that selected category.

Step by Step

The goal of this exercise is to find the desired products for a specific supplier using the Browse by Supplier search.

1. Open **Product Search**. For more information, refer to Advanced Search by Vertical on page 62.
2. Select the **Browse By Supplier** link found under **Other Searches** below the Basic and Advanced Search. The Browse By Supplier search window displays.



Search

Other Searches

Browse by: Supplier | Category | Contracts | chemicals

3. Search and Locate the supplier whose products you would like to review.
4. To view all suppliers, click the **Search** button.
 - a. To search by supplier name, use **the Supplier / Catalog Name** field. Only the first few letters of the supplier's name are required.
 - b. From the **Show Types** drop down, select **Hosted Catalog Suppliers**.
 - c. Click the **Search** button to see the results for the supplier being located. The Supplier results display.
 - d. From the list of suppliers, select the desired supplier by clicking the appropriate link in the **Supplier Name** column. The Supplier details and category listing displays.
5. From the supplier category page, select the desired product category by clicking on its name or the + next to its name. Continue drilling down into the categories (expanding/collapsing) until you locate the sub-category that you would like to view.

6. Final sub-categories (with items) are indicated with the word view next to it. Click the view button to view the items for the supplier in that particular category. You will be taken to the Search Results page.

SEARCH TIPS:

Click **Browse Categories** after search results display to return to the prior list of categories and select a different product category for viewing.

SEARCHING BY CATEGORY

The Browse by Category functionality is similar to the Browse by Supplier functionality. The main difference is instead of viewing one supplier's table of contents; **all** supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section – beakers for example.

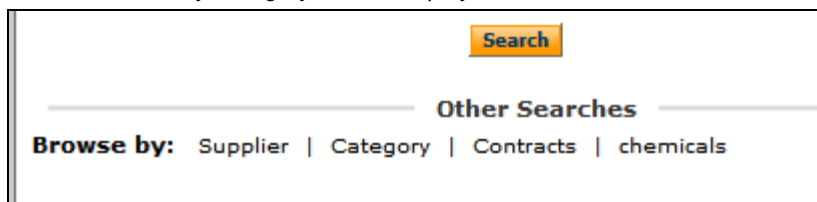
Browse by Category provides a quick way to locate all items – across all suppliers – in a certain category.

As with the Browse by Supplier functionality, once the desired chapter is found (category of products in this case), a single click takes the user to all the products provided by all suppliers in that selected category.

Step by Step

The goal of this exercise is to find the desired products using the Browse by Category search.

1. Open **Product Search**. For more information, refer to page 62.
2. Select the **Browse By Category** link found under **Other Searches** under the Basic and Advanced search. The Browse By Category screen displays.



3. A full list of available categories, across all hosted catalogs is presented. This is your full table of contents. Drill-down to the category of your choice using the + and – functions, which allow you to expand and collapse categories.
4. Final sub-categories (with items) are indicated with the word **view** next to it. Click the **view** button to view the items in that particular category. You will be taken to the Search Results page.
5. The Search Results page displays all of the items in the category selected for all suppliers. You may want to use the product comparison functionality for further product/supplier comparison. This feature is discussed on page 82.

SEARCH TIPS:

Click **Browse Categories** after search results display to return to the prior list of categories and select a different product category for viewing.

SEARCHING WITH PUNCH-OUT SUPPLIERS

In addition to searching supplier-hosted catalogs that are loaded in to the SelectSite database, searching for items via punch out suppliers can be performed. Punch-out vendor sites are very useful in finding products and services that require some configuration like computers, oligonucleotides, etc.

When accessing a punch-out supplier via SelectSite, the user is automatically authenticated to the supplier, so the supplier's website knows which organization the user is from to show the appropriate products and pricing.

For configurable items, e.g., computers and oligonucleotides (DNA/RNA), punch out catalogs is the preferred method for finding/configuring products. Product configuration sites like Dell, Gateway, and Invitrogen (DNA/RNA) are examples of when a punch out is preferred/required versus using a hosted catalogs.

Punch-out vendors are shown with icons (typically company logos) at the bottom of the search interface for each vertical. The **All** vertical shows all punch out vendors.

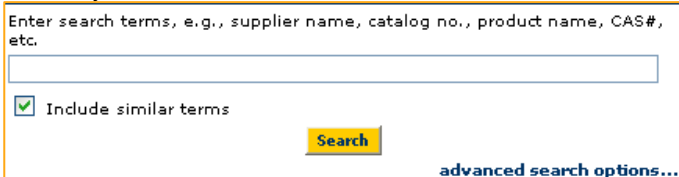
IMPORTANT: The interface and usability of punch-out shopping varies between suppliers. The step-by-step instructions of how to shop on each supplier's website is not provided in the exercise below.

Step by Step

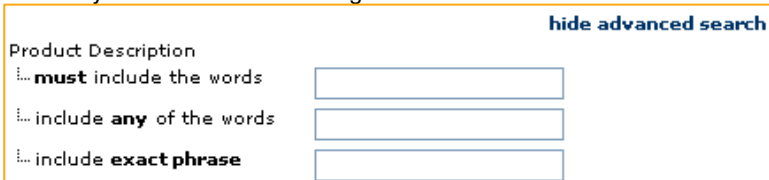
The goal of this exercise is to use a punch out site to find the desired product.

1. Open **Product Search** and select the desired **vertical** from the column on the left side of the screen. For more information, refer to Advanced Search by Vertical on page 62.
2. If you know which supplier you would like to "visit" and want to go directly to the supplier's site, follow step 2a. To perform a keyword search, follow steps 2b – 2d.
 - a. Below the keyword search area, the available punch-out suppliers display. **Note:** Only punch out suppliers made available to each user through their profile or role(s) are shown. **Click the supplier icon.**
 - b. Enter keyword(s) in any one of the search fields, then click **Search**.

- o Enter keywords from the Standard Search



- o Enter keywords from the following locations in the Advanced Search



- c. Above the search results, a list of matching suppliers displays. If the supplier has a punch-out site, it is indicated in the Supplier Options column, as shown below.

Filter By Suppliers

- Alexis Corp. (17)
- Denville Scientific Inc. (2)
- ICN Biomedicals, Inc. (16)
- Lancaster Synthesis (31)
- Matreya, Inc. (10)
- Oxford Biomedical Research (4)

Filtered By Categories

- Avidin/Streptavidin Biotin Products (2)
- Chemical Oxidation/Reduction Assays (4)
- Lipid Extracts (43)
- Phospholipids (1877)
- Radiolabeled Lipids (88)

Results for: **+lipids**

Show product details

Suppliers with Matches (results found 8)

Supplier	Supplier Options
VWR	Punchout... Categories... Non-Catalog...
Alexis Corp.	Categories... Non-Catalog
Forms Company	Forms...
Contract Company	Contracts...

Search Results

Results per page: 20 Products found: 2336 Page 1 of 117

Weight	Supplier	Category	Catalog #	Product Description	UOM	Size	Price	Quantity	Add to Cart
--------	----------	----------	-----------	---------------------	-----	------	-------	----------	-------------

- d. Click the **Punchout...** link to access the supplier punch-out site.

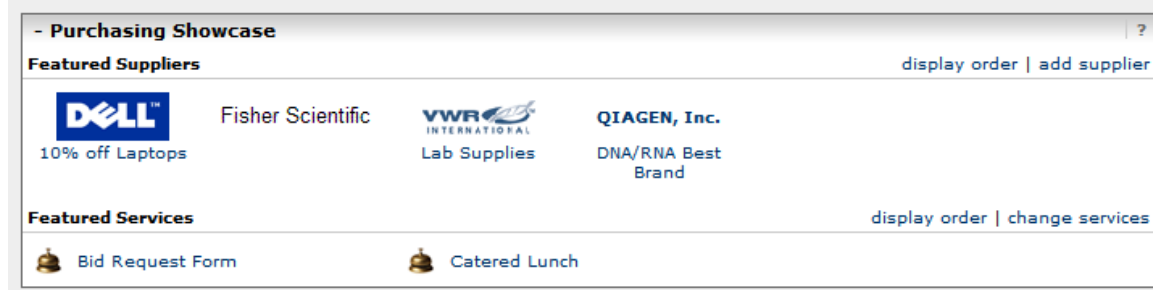
SEARCH TIP:

In order for a punchout supplier to be listed in the Suppliers with Matches table, your system administrator must enter and define keywords associated with the items sold by the supplier via the Supplier Profile. Refer to the Administrator Handbook for more information.

- Once the punch out is selected, the browser is redirected to the supplier's website. The supplier's website is framed within the SelectSite browser window.
- To cancel the punch out, select the **Cancel Punchout** button at the top of the screen.
- Once within the punch out site, use the appropriate search tools to find the desired products. Once all products are found, check out of the punch out site. The products in the punch out shopping cart are returned to the SelectSite shopping cart.
- TIP:** An order is NOT being placed with the supplier when checking out of their punchout site. The purchasing process continues once returned to SelectSite.
- Additional products can be added to the SelectSite shopping cart from other punch out vendors as well as hosted catalog vendors

SHOPPING FROM THE PURCHASING SHOWCASE

The Purchasing Showcase is an area of the Product Search page that organization's can choose to highlight specific suppliers, forms, and more. An example Purchasing Showcase is shown below. **NOTE:** Organizations are not required to use the Purchasing Showcase, in which case, this exercise would not be applicable.

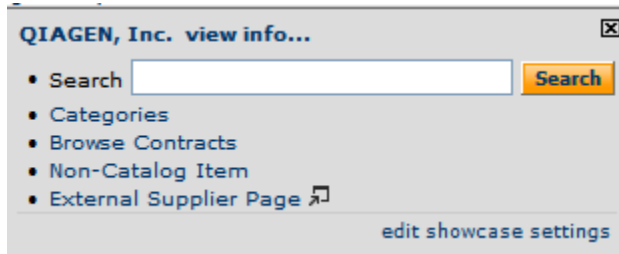


Suppliers listed in the Purchasing showcase may or may not have an icon attached to their name. Additionally, suppliers can have a caption, such as the ones shown above indicating what the supplier offers or special discounts.

Step by Step

The goal of this exercise is show users how to shop suppliers and/or featured services in the Purchasing Showcase.

1. Open **Product Search**. For more information, refer to page 62.
2. To shop from a **featured supplier**:
 - a. Click on the **Supplier name** or **icon** in the Purchasing Showcase. A pop-up displays that indicates HOW you can shop from the supplier. The options can include hosted or punch-out shopping, browsing by contract, or using a non-catalog form. An example is shown below.



- b. The search results display just as they do with standard searches. Locate the item(s) to purchase and add them to your cart.
3. To shop from a **featured service** – meaning a form (which may or may not be associated with a contract):
 - a. Click on the **form name** in the Featured Services area. The form displays.
 - b. Populate the form as normal and add the line item(s) to your cart.

PERFORMING CHEMICAL STRUCTURE SEARCHES

The Chemicals search is a tool geared specifically to chemists. This searching tool allows chemists to search for commercially available products by drawing structures and sub-structures. Additional parameters can be included to refine search results including molecular weight and molecular formula.

IMPORTANT:

SciQuest had upgraded the technology that powers current Chemicals search. The functionality and features are very similar between the two technologies, with the new technology providing higher quality searching capabilities and data.

Other details of the solution:

- A security message pops up the first time you access the tool.
- The new technology requires Java 1.4.2 or later and is supported by the browsers found on the following webpage:

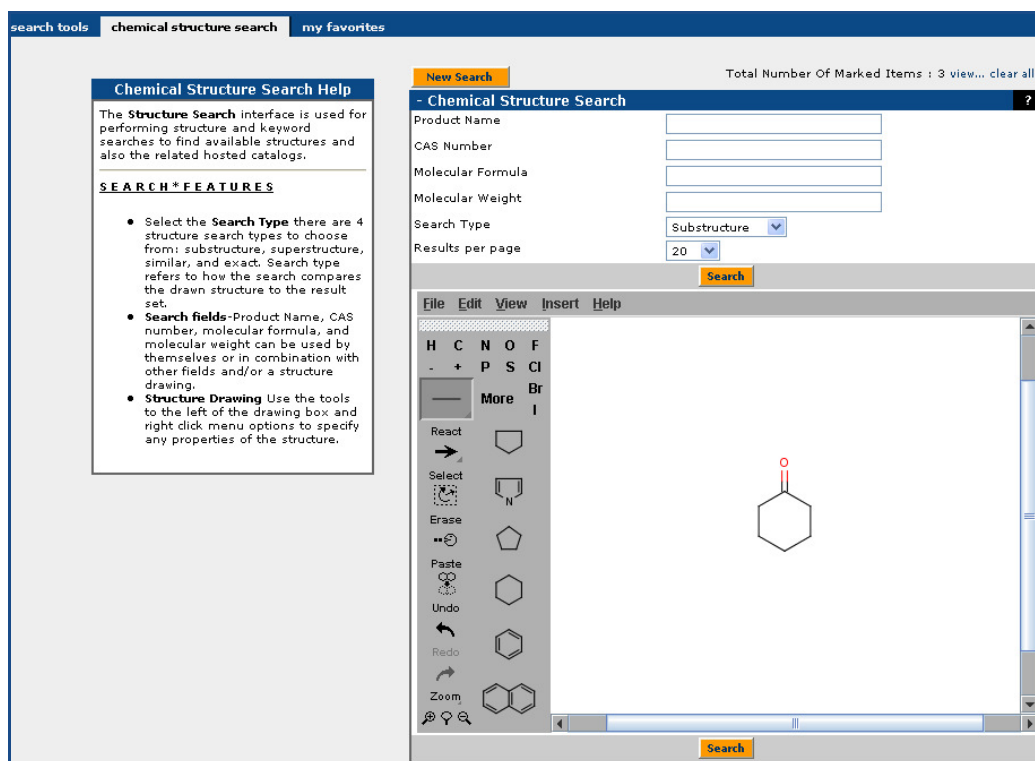
<http://www.chemaxon.com/marvin/help/developer/applets/browsers.html>

- The new technology is fully integrated within the SelectSite application and does not require working in secondary or pop-up screens.
- SciQuest will have full capability to load the structure data provided by suppliers and will update data with every major release if needed.
- For more information about the Chemical Structure Search, refer to the New Feature Documentation found in the Support KnowledgeBase.

Step by Step

The goal of this exercise is to access the **Chemical Structure Search** tool and find commercially available products by drawing chemical structures and sub-structures.

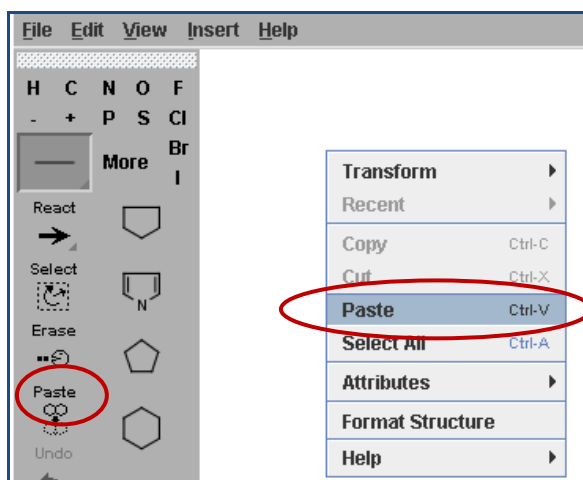
1. Login to SelectSite and select the **Product Search** navigation tab.
2. Option - Select **a** or **b** below:
 - a. Select the **Chemicals** link found under **Other Searches** on the left side of the Product Search table. **Note:** This link is only available to users with the appropriate permission.
 - b. Select the **Chemical Structure Search** sub-tab from the Product Search navigation tab.
3. The first time this tool is used, a warning message displays. Click **Run** to continue. The Chemical Structure Search displays on the screen, as shown below:



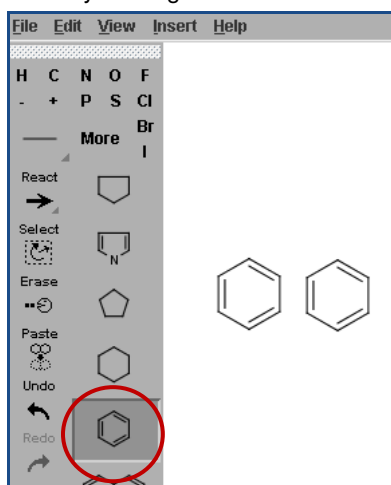
4. **Define the criteria.** The criteria entered/selected, determines the structure search results. A user can perform any combination of the following:
- Enter criteria in the fields at the top of the screen, including: Product Name, CAS Number, Molecular Formula, Molecular Weight, Search Type, and Results per page. Entering data in all of these fields is optional, but is a way to narrow down your search and can be used in combination with the drawings at the bottom of the screen. **HELPFUL TIP:** Click on the field label for any of these criteria options to access Help for the field. Detailed information about the option can be found, as shown in the example below.



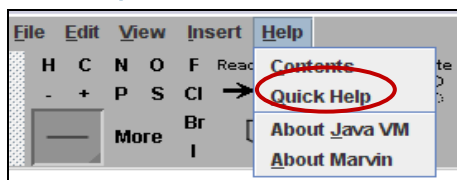
- Paste an existing structure or sub-structure into the drawing block. This is a helpful tool for many scientists who have structures available in other tools such as *Isis Draw*. You can paste an existing structure either by selecting **Edit → Paste** from the toolbar, **right-clicking** and selecting **Paste** or by selecting the **Paste** icon on the left side of the drawing block.



- c. Draw a structure or sub-structure in the drawing box. With this option, simply select the entity that you would like to add to the drawing block and click the mouse within the drawing box. In the example below, the Benzene ring icon was selected, and two rings were added to the drawing block by clicking the mouse twice.



- d. Make any changes to your drawing by using the Select, Erase, Undo, Redo, and other options available. To learn more about how to create drawings – and how each of the options work – refer to the [Help](#) guide provided by the manufacturer. This is located via [Help](#) → [About Marvin](#) → [Quick Help](#) as shown below.



5. Click the [Search](#) button to search for matching structures. Structures display in order of relevance. An example of the Structure Results screen is shown below.

+ Expand Search Parameters

Total Number Of Marked Items : 3 view...clear all...

New Search Edit Query Available Actions Search Catalog **Go**

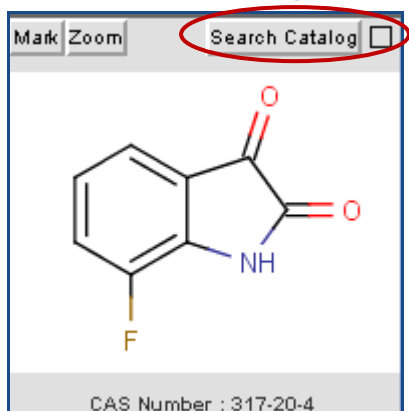
Chemical Structure Search Results

Results per page: 20 No. of Structures meeting the search criteria: 26 Page 1 of 2

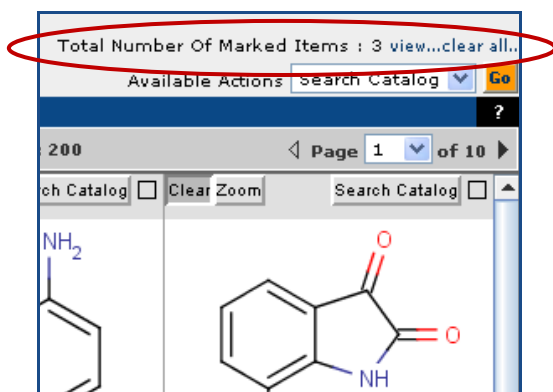
 CAS Number : Search Catalog	 CAS Number : Search Catalog	 CAS Number : Search Catalog	 CAS Number : 504-02-9 Search Catalog
 CAS Number : 108-94-1 Search Catalog	 CAS Number : 1655-07-8 Search Catalog	 CAS Number : 1175-06-0 Search Catalog	 CAS Number : 21370-71-8 Search Catalog
 CAS Number : Search Catalog	 CAS Number : Search Catalog	 CAS Number : Search Catalog	 CAS Number : Search Catalog

6. Review the list of structures.

- To see the products that match a single structure, click the **Search Catalog** button above the structure.
- To see products for multiple structures, click on the **X** in the right-hand corner of each structure, then select **Search Catalog** → **Go** from the Available Actions drop-down box.



- If you cannot find the structure you are looking for, you can either edit your current criteria by selecting the **Edit Query** button above the search results OR select **New Search** to remove existing search criteria and start new.
- Marking results:** You may want to mark certain structures for review later. SelectSite allows you to temporarily "hold" all of your marked structures, from one or more searches and across multiple logins. To mark a structure, click the **Mark** icon above the structure picture. A list of current marked items displays above the structure search results, as shown in the graphic below. Click the **view...** link to view the currently marked structures or click **clear all...** to remove the "marks" for each of the structures. **Note:** This does not remove the structures from the result list.



7. The product results – if any – display. From this screen, you can add items as you normally would. If no items display, this is an indication that the “matching” hosted catalogs are not enabled at your organization or that the user does not appropriate permissions to view the item(s). **Note:** You have the option the go back to the structure results and select different structures to view potentially different results. Click the [back to chemical structure search results](#) link above the product search results, as shown below.

Results for: +504-02-9

[back to chemical structure search results](#)
[show product details](#)

Add To Active Cart

Go

Search Results

legend | ?

Products per page 20

Products found: 9

Page 1 of 1

Weight ▾	Supplier ▴	Category ▴	Catalog # ▴	Product Description ▴	UOM ▴	Product Size ▴	Price	Quantity	Add to Cart	Select
100	Fisher Scientific	Fine Chemicals	AC111171000	1,3-Cyclohexanedione, stabilized 100 GR, 97% CAS: (504-02-9) 1/EA	1/EA		29.82 USD	<input type="text" value="1"/>		<input type="checkbox"/>
68	VWR International	Fine Chemicals	LCX01261G0025 (EA)	1,3-Cyclohexanedione, 98%	1/EA	25g	14.86 USD	<input type="text" value="1"/>		<input type="checkbox"/>
check availability...										
68	VWR International	Fine Chemicals	LCX01261G0100 (EA)	1,3-Cyclohexanedione, 98%	1/EA	100g	27.78 USD	<input type="text" value="1"/>		<input type="checkbox"/>
check availability...										
68	VWR International	Fine Chemicals	LCX01261G0500 (EA)	1,3-Cyclohexanedione, 98%	1/EA	500g	110.09 USD	<input type="text" value="1"/>		<input type="checkbox"/>
check availability...										
68	Moye Products	Fine Chemicals	L01261-18	1,3-Cyclohexanedione, 97+%, may cont. up to 1% NaCl	EA	50g	0.99 USD	<input type="text" value="1"/>		<input type="checkbox"/>
68	Moye Products	Fine Chemicals	L01261-22	1,3-Cyclohexanedione, 97+%, may cont. up to 1% NaCl	EA	100g	0.99 USD	<input type="text" value="1"/>		<input type="checkbox"/>
68	Moye Products	Fine Chemicals	L01261-14	1,3-Cyclohexanedione, 97+%, may cont. up to 1% NaCl	EA	25g	0.99 USD	<input type="text" value="1"/>		<input type="checkbox"/>
68	Moye Products	Fine Chemicals	L01261-08	1,3-Cyclohexanedione, 97+%, may cont. up to 1% NaCl	EA	1000g	0.99 USD	<input type="text" value="1"/>		<input type="checkbox"/>
68	Ryan Scientific, Inc.	Fine Chemicals	S8 01019 (50g)	cyclohexane-1,3-dione, 50g	EA	50g	203.00 USD	<input type="text" value="1"/>		<input type="checkbox"/>

Products per page 20

Page 1 of 1

USING ANTIBODY RESOURCE

Antibody Resource is a tool geared specifically to biologists or researchers who use antibodies in their research. This search tool is a parametric search that allows users to filter products based on antibody specific attributes, e.g., Clone, Species Reactivity, Conjugate, etc.


Search Results are presented in a different format from the normal product search. Additional columns are included to help the researcher make informed decisions.

Step by Step

The goal of this exercise is to access the Antibody Resource parametric search to find commercially available antibody products.

1. Open **Product Search**. For more information, refer page 62.
2. Select the **Antibodies** vertical from the Categories listing on the left side of the screen. Antibodies is a sub-category of Lab Supplies, as shown in the graphic below:



3. Once Antibodies is selected, search criteria specific to antibody searches displays.
4. Select the appropriate category, conjugate, or host from the respective pull-downs if appropriate.
5. After defining your criteria, click the **Search** button. The Search Results display at the bottom of the screen. Antibody Search results contain additional columns relevant to Antibodies. Sorting can be performed by any of the columns with  below the column name.

Lesson 5: ADDITIONAL SEARCH FUNCTIONALITY

Concepts

NON-CATALOG ITEM ENTRY

SelectSite allows you to quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

The **non-catalog item entry screen** is an overlay “popup” that can be accessed from many different places in the application. The screen is easy-to-use and allows for quick entry of non-catalog items.

NOTE to customer prior to SelectSite version 7.2: Instead of using the non-catalog item entry screen, you may be using a form configured as a Non-Catalog form. This is an option.

Your organization may or may not allow non-catalog item ordering and is a setting that can be by a System Administrator.

FORMS

Forms are used in SelectSite to purchase items outside of hosted and punch-out catalogs. Forms are a fully customizable way to track requests for items, services, information, or actions by an organization.

The use of forms is optional but provides a flexible, customized way to track such things as Services Orders, Capital Expenses, and Internal Requests for a New Supplier. The fields and field labels are customizable on a form; therefore, users can track the necessary information without irrelevant fields on the screen.

In most cases, Spend Director-only customers do not use forms, but instead handle all one-off purchases in their primary financial system.

Exercises

USING QUICK ORDER

Quick Order is used when the exact product catalog number (SKU) is known. Both the supplier and manufacturer part numbers are searched when using **Quick Order**.

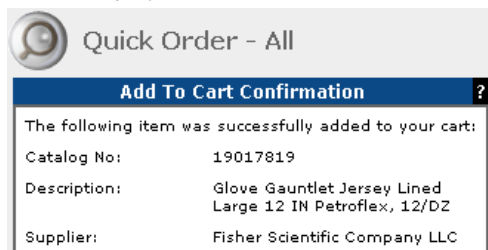
If the catalog number entered is an exact match to a product in the hosted catalogs, and there is only one match, the product is automatically added to the shopping cart. If an exact match is not found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product. Quick Order allows you to order one or more products simultaneously.

Step by Step

The goal of this exercise is to add one or more items directly into the cart when the complete catalog number is known.

1. Open the **Quick Order** tab using one of the following methods:
 - Select your organization’s logo in the top left corner. This is a shortcut to the home page. From there, select the **Quick Order** sub-tab.
 - Select the **Quick Order** sub-tab from the **home page** navigation tab.
 - Select the **Quick Order** sub-tab from the **search** navigation tab.

- Optional: Select the appropriate vertical to search from the Categories list once the **Quick Order** tab is active.
- Enter the catalog number(s) in one or more of the **Catalog # /SKU** fields and click the **Add to Current Cart** button. One of the following occurs:
- If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, then the product is automatically added to the shopping cart. In the example below, a quick order search was performed on ALL verticals, and the following item was added to the cart. This information displays on the left side of the screen.



NOTE: If you would like to add the SKU automatically, it is important to enter the SKU exactly as the supplier has it listed. You should include periods, dashes, parenthesis, units of measure, etc... whenever this type of information is included in the supplier's identification.

- If an exact match is **not** found or more than one product is found, Search Results are presented to allow for the selection of the appropriate product.
- If no search results are found, a link to the non-catalog form is presented, assuming you are allowed to place non-catalog orders with this supplier.

SEARCH TIP:

Enable the **Include Similar Terms** checkbox to see a list of similar items. In most cases, a list of similar items will be displayed from which you can make your selection.

REVIEW ADDITIONAL SUPPLIER/PRODUCT INFORMATION

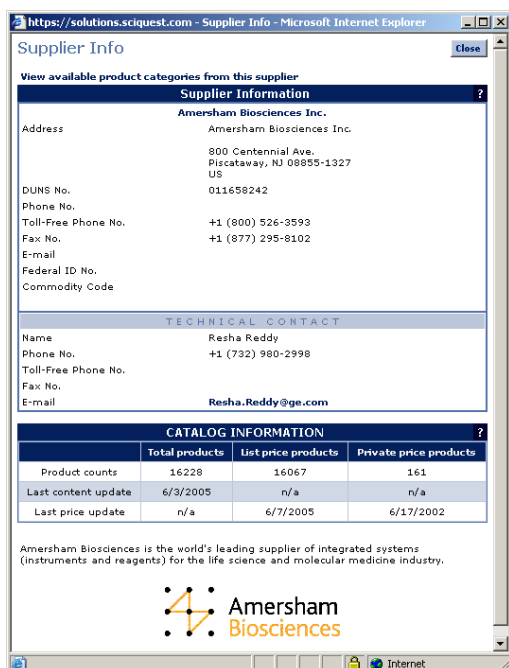
After searching for an item, the Search Results are displayed as discussed on page 46. If more information about the **item** or the **supplier** for the item is required, select either the product description or the supplier name in Search Results.

Supplier information contains contact information for the supplier, link to the supplier's website, and contract information (if applicable). Product information can contain additional product attributes, as well as links to product specific information like MSDS.

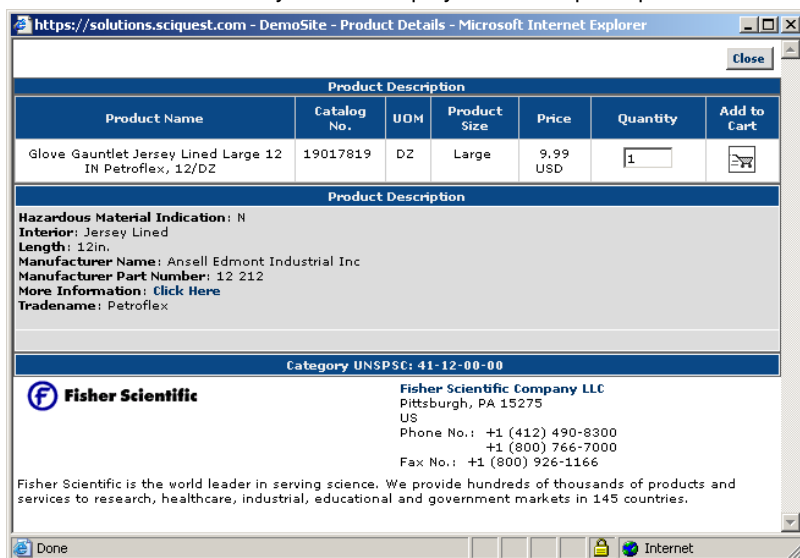
Step by Step

The goal of this exercise is to review supplier and product information not contained on the Search Results screen.

- Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
- To view detailed supplier information for an item, select the **supplier name** from the Search Results. A popup window displays with details about the supplier, including contact information and possibly item and catalog details. An example is shown below.



- Click the **Close** button to exit the window.
- To view additional product details, select the appropriate link from the Product Description column. The Product Details secondary window displays. An example is provided below:



- Review the information. To see more information about the product, click the **Click Here** link beside of **More Information**. A new browser is opened directed to the supplier website-typically the specific product page on their site. Click the **Close** button to exit the window
... OR...
Enter the quantity to be purchase in the **Quantity** field, and then click the **Add to Cart** button.

REFINING SEARCH RESULTS

If the Search Results at the bottom of the screen do not provide exactly what you need, you may want to refine your search or access a supplier punch-out site.

For information on performing initial searches, refer to the exercises in the previous lesson.

Step by Step

The goal of this exercise is to refine Search Results after the initial search is completed.

The screenshot shows the SciQuest search results page. At the top, there are tabs for 'Favorites', 'Quick Order', 'Product Search' (which is active), and 'Forms'. Below the tabs is a search bar with the text '+ Expand to refine search' and a button '+ Click for Purchasing Showcase'. The main content area shows 'Results for: +large +gloves' and 'Products found: 19'. A table lists the products with columns for Weight, Supplier, Category, Catalog #, Product Description, UOM, Product Size, Price, Quantity, Add to Cart, and Select. The table contains five rows of product information, all from the supplier 'Fisher Scientific'.

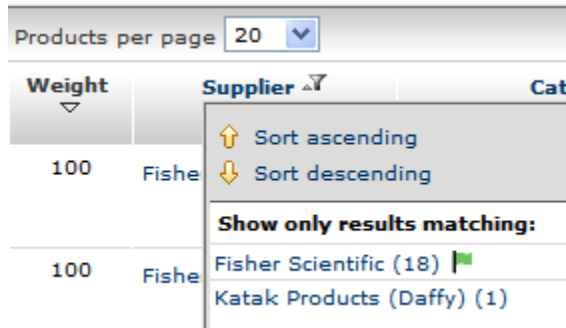
Weight	Supplier	Category	Catalog #	Product Description	UOM	Product Size	Price	Quantity	Add to Cart	Select
100	Fisher Scientific	General Laboratory Safety Equipment	NC9224107	Saratoga Gloves Large	PR		42.00 USD	1		<input type="checkbox"/>
100	Fisher Scientific	General Laboratory Safety Equipment	NC9298670	Nfpa Cowhide Gold Gloves Large	EA		35.00 USD	1		<input type="checkbox"/>
100	Fisher Scientific	General Laboratory Safety Equipment	NC9419383	Large Od Hatch Operator Gloves	EA		38.48 USD	1		<input type="checkbox"/>
100	Fisher Scientific	General Laboratory Safety Equipment	NC9484043	Rubber Gloves Large	EA		1.75 USD	1		<input type="checkbox"/>
100	Fisher Scientific	Protective gloves	NC9970937	Teal Nitrile Gloves Sz: Large	CS		115.00 USD	1		<input type="checkbox"/>


1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen. An example of the results screen is shown below:
2. If an organization has set up their supplier data to do this, the **Supplier with Matches** box displays directly above the Search Results. A list of suppliers with possible items/services that match your request display, along with how items can be ordered using the supplier. Each supplier will have one or more order type available:
 - a. **Punchout** – Click on the punchout link to go directly to the supplier's website.
 - b. **Categories** – Click the Categories link to view the categories for the items available from the supplier's hosted catalog.
 - c. **Non-Catalog** – click Non-Catalog to request an item or service that is not in the Hosted or Punch-out catalog.

NOTE TO ADMINISTRATORS:

The information that displays in the Supplier with Matches box is dependent on the keyword search setup in the Supplier Profile. Refer to the Administrator Handbook for more information.

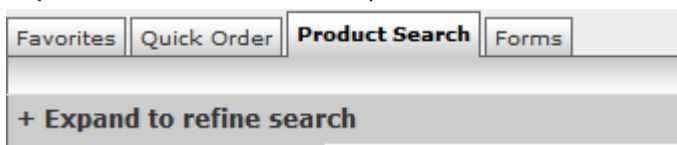
3. To **Filter by Supplier**, click the link on the right side of the Supplier header in the Search results. A list of all of the suppliers with one or more items displays in a pop-up window.



- The suppliers are listed in alphabetical order with the number of items matching the search criteria shown in parenthesis on the right side of the supplier name
 - Preferred suppliers are indicated by flags to the right of the supplier name.
 - To view the items for the supplier in the search results, click the supplier name. Only the items for the selected supplier displays.
- To **Filter by Category**, click the  link on the right side of the Categories header in the Search results. A list of all of the categories with one or more items displays in a pop-up window.



- The categories are listed in alphabetical order with the number of items matching the search criteria shown in parenthesis on the right side of the category name.
 - To view the items for a specific category in the search results, click the category name. Only the items for the selected category displays.
4. **Refining your Search by modifying search criteria:** To modify, add, or delete keywords, select the **Expand to refine search** link to open Product Search.



5. From the Product Search screen, enter new keywords, modify/delete existing keywords, and/or change verticals. Click Search to produce the new search results.
6. After refining the search, the updated search path is shown above the search results. For example,

Results for: **+large +cylinder** > **Lab Safety Supply Inc.**

USING THE COMPARISON FUNCTION

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. This function also allows you to determine the best pricing by auto-calculating prices based on Unit of Measure or Product Size.

NOTE:

The product comparison feature can only be used to evaluate HOSTED catalog items. Items from punchout suppliers do not display in the search results, therefore cannot be part of the side-by-side product comparison.

Step by Step

The goal of this exercise is to compare two or more products side-by-side.

1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
2. On the right hand side of the Search Results, select two or more check boxes under the **Select** column for the products to be compared.
3. Select **Compare** from the drop-down list box above or below the search results (as shown below), and click the **Go** button. The Product Comparison screen displays and replaces the search results.

A screenshot of a web interface showing a dropdown menu with the word 'Compare' selected. To the right of the dropdown is a yellow button with the word 'Go' in black text.

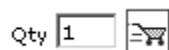
4. The Product Comparison page lists, vertically, all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute. A sample product comparison screen, along with details on how to use this screen is provided below.

<div> << Back to Search Results </div> <div> Add To Active Cart Go </div>			
Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	Qty 1	Qty 1	Qty 1
Product Details	Protective Clothing, Gloves; Poly-D-Gloves (Large)	Ppe Kit Size X-large	Latex Gloves, Powdered, Large, Box Of 100
Catalog No.	0180441310	NC9295595	145904
Price	95.05 USD	16.00 USD	15.99 USD
Supplier	ICN Biomedicals, Inc.	Fisher Scientific	Katak Products (Daffy)
Category	Gloves	Gloves	Protective gloves
UOM	----	----	----
Price per UOM	95.05 USD/ unit	16.00 USD/ unit	15.99 USD/ unit
Product Size	----	----	----
Price per Product Size Unit	----	----	----
	Select units...		
Alternate Part Numbers	----	NC9295595	----
Category UNSPSC	46181504	46181504	46181504
Image URL	----	----	http://bsd1.officedepot.com/pictures/sk/md/145904_sk_md.jpg

- To remove a product from the compare page, click the check box at the top of the product and select the **Remove** action from the action menu, then click **Go**. The product is removed from the list of items.
- Click on any of the links, indicated in bold text, for more information. These links typically open a new browser directed to the specific products webpage on the supplier's website.
- To determine pricing breakdown, use the **Price per Product Size Unit** field, then select the unit for evaluation. This selection will auto-calculate the price per UOM and Product Size. This feature allows the user to easily change the UOM for evaluation. For example, you can evaluate the products in L vs ML.
- Click the **more info** link to view a detailed product description, and if available, a graphic of the item (indicated by the camera).



- To add an item to the cart, enter the quantity in the Quantity field, then click the Add to Cart icon.



- Click the **Back to Search Results** button to go back to the original search results and cancel the product comparison. From here, additional products can be selected for comparison.

USING FORMS

Forms are typically used to order goods and services that do not fit in to the hosted catalog model, e.g., catering services, business cards, or temporary labor. Additionally, forms allow for the input of additional information by the requisitioner that is delivered to the supplier of the good or service.

Forms are created/configured by each organization and are **not** required but are frequently used in SelectSite. The actual name(s) and field setup of the forms vary by organization, but the exercise below is applicable to all configured forms. Some examples of forms that your organization may use:



- Services Form
- Change Order Form
- Lease Request Form
- Contract Payment Request Form
- Food Services Request


Forms are used to order goods and services where additional inputs are needed from the requisitioner.

Step by Step

The goal of this exercise is to use a form to order goods or services.

1. Open the **Forms** tab using one of the following methods:
 - a. Select your organization's logo in the top left corner. This is a shortcut to the home page. From there, select the **Forms** tab.
 - b. From the **home page** navigation tab, select the **Forms** tab.
 - c. From the **product search** menu, select the **Forms** tab.
2. Once the Forms tab is active, select the appropriate form from **My Forms** or **Organization Forms**.
3. Enter the optional and required information on the form. Required fields are in **bold**.
4. Once the form is filled out, select one of the following actions:
 - a. To add the populated form to your current cart, select **Add to Current Cart** from the available actions drop-down box and click the **Go** button.

Available Actions:  
 - b. To add the populated form to a draft cart or to a cart that you previously submitted but has not been approved, select **Add to Draft Cart or Pending PR/PO** from the available actions drop-down box and click the **Go** button.
 - c. To add the item to your favorites, select **Add to Favorites** and click **Go**. A pop-up window displays where you can select the name of the favorite item and folder (location).
5. The item, goods, or service is added to the shopping cart. To edit the form once added to the cart, click on the form name in the cart.

NOTE: Refer to Online Help () for additional information about forms.

ENTERING NON-CATALOG ITEMS

SelectSite allows you to quickly and easily add non-catalog items to your cart. Non-catalog items should be entered when a requisitioner cannot find the item needed from hosted or punch-out catalogs. Entering non-catalog items is also required when items are very new to the market and/or have not been added to available catalogs.

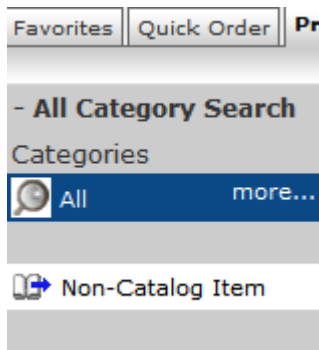
Your organization may or may not allow non-catalog item ordering. This exercise is not applicable if this feature is not available to requisitioners.

Suggestion: It is recommended to order items via hosted or punch-out catalogs whenever possible. Non-catalog ordering may require additional approval steps.

Step by Step

The goal of this exercise is to order an item that is not available in either a hosted catalog or punch out catalog.

1. **Login** to the system.
2. Open the **Non-Catalog Item** popup. This popup window can be accessed from many places in the application including the shopping cart, a pending PR/PO, a Completed PO, from the Quick Order tab, Product Search tab, Browse by Supplier, Favorites, and the Forms tab. From any of these locations, click on the **Non-Catalog Item** link, as shown in the example below.



3. The Non-Catalog Item popup looks similar to the one shown below. Follow the steps below to enter one or more items to your cart.

A screenshot of a 'Non-Catalog Item' popup window. The title bar says 'Non-Catalog Item' with a question mark and close button. The main content area has a header 'A.I. Scientific Co. Inc.' with a 'change...' link. Below this is a '+ Show distribution methods' link. The form has a table with columns: 'Product Name/Description', 'Catalog No.', 'Product Size', 'Quantity', 'Price Estimate', and 'Packaging'. The 'Product Name/Description' field contains 'Widget 2007' and has a '244 characters remaining' indicator and 'expand | clear' links. The 'Catalog No.' field contains '12345'. The 'Product Size' field is empty. The 'Quantity' field contains '12'. The 'Price Estimate' field contains '9.99'. The 'Packaging' field contains 'Each'. At the bottom, there are three buttons: 'Save and Close', 'Save and Add Another', and 'Close'.

NOTE: The steps below may vary by organization. Some sites and users are set up to bypass the SKU search, while it is required for others. The steps below assume the Bypass the SKU search permission is enabled. Additionally, it is assumed that the permissions to add a new supplier is off, so only the selection from existing suppliers is permitted.

4. Select the Supplier for the non-catalog item:
 - a. Click **choose supplier...**:

{No Supplier Selected} choose supplier...

The following pop-up displays.

- b. OPTION 1: If you know the supplier for the item, choose the default from the Supplier selection criteria: **Choose from a list of known suppliers**, then click the **Select Supplier** button.
 - c. In the Supplier Search window, enter the supplier name or the beginning of the supplier name (example: A for Apple Computers), then click **Search** or press **Enter**. Leave the field blank to see a full list of suppliers.
 - d. The matching suppliers display in the Supplier Search window. Click **Select** for the appropriate supplier and the window automatically closes and populates the Non-Catalog Item popup.
 - e. OPTION 2: If you do not know the supplier for the item you need, select **Supplier not known/don't care** from the Supplier selection criteria box, then click **OK**.
 - f. From the Non-Catalog Item form, click the **Search** button in the Supplier Info section. The Supplier Search screen displays.
5. Fill in all required fields: Product Description, Catalog #, Product Size, Quantity, Price Estimate, and Packaging info.
 6. **Optional:** Click the **show product details** link to enter additional information for the item. The popup will expand and you can make your selections. Click **Hide product details** if you do not want to view the bottom half of the screen.

7. After entering the item information:
 - a. If you only want to order one item from the supplier, click **Save and Close**.
 - b. If you want to order multiple items from the supplier or another supplier, click **Save and Add Another**. The screen will empty except for the supplier, which can be modified if needed.
 - c. Click **Close** if you want to exit the Non-Catalog popup.
8. The item(s) that were added can be viewed from the shopping cart. To edit the non-catalog item once added to the cart, simply click on its name in the cart and the popup will display.

YOUR FAVORITES

Lesson 6: MANAGING FAVORITES

Favorites can be used by a requisitioner to identify items that are frequently ordered. By setting up favorites, less time is spent searching for items that will be ordered again in the future.

Key Concepts

FAVORITES

Within SelectSite, there are two types of favorites items: Personal Favorites and Organization Favorites. Personal favorites are those that an individual identifies for future purchasing. With personal favorites, folders and sub-folders can be created to manage the favorites; users have full control over items in their personal folders. Organization favorites and folders are defined by site administrators. These items typically represent frequently ordered products or suggested products for purchase. Requisitioners cannot modify Organization Favorites.

The following types of items or requests can be saved as favorites:

- Hosted items
- Punchout Items
- Non-Catalog items
- Populated Forms – any type – service requests, food requests, etc...

Searching for Favorites

Organizational AND Personal favorites are searchable and display in the search results. For example, you may order continental breakfast for a monthly meeting. The first month you fill out the *Food Services Form* on your site and choose to save it as a favorite. The next month you can simply enter “continental breakfast” in the product search and the populated form will display in the search results. Simply enter the number of people attending in the quantity field and click [Add to Cart](#).

Managing Favorites

The Favorites navigation menu is used to create and define company and personal favorites folders and items. Items can be moved and copied between folders. Current folders may also be edited and deleted. Note: Favorite items can be also be added through search results and the checkout screens.

VIEWING FAVORITES IN SEARCH RESULTS



Favorites are identified in search results by the Add to Cart icon with a star, as shown to the left.

In the example below, a populated form, identified as a personal favorite displays in the search results.

Results for: +standard +mac +computer +for +office
show product details

Add To Active Cart

Go

Search Results

legend | ?

Results per page 20

Products found: 1

Page 1 of 1

Weight ▾	Supplier ▴	Category ▴	Catalog # ▴	Product Description ▴	UOM ▴	Product Size ▴	Price	Quantity	Add to Cart	Select
100	Apple Computer Inc.			Standard Mac Computer for Office			898.00 USD	1		<input type="checkbox"/>

Exercises

ADDING FAVORITE ITEMS TO YOUR CART

The **Favorites** functionality allows individuals and organizations to store items that are referenced or ordered on a regular basis. Both options are controlled by permissions.

Once items are added to **Favorites** they can be added to a shopping cart from either of two places: from the **Favorites** tab accessed via the home page or Search Tools navigation tab OR from the My Favorites navigation tab.

Step by Step

Users may add items from **Favorites** to the cart in two ways, each of which is explained below.

Task 1: Add items from the Favorites tab

1. Navigate to the **Home** screen. Select the **Desktop** sub-menu if not already selected.
2. Select the **Favorites** tab. Note: the Home page defaults to the last tab the user visited.
3. From the **folder** drop-down, select the folder from which to select products to add to the cart.

folder My Favorites

4. After the folder is selected (my favorites, company favorites, or a sub-folder), the favorite items for the folder displays.
5. Select the item or items to add to the cart:
6. Click on a single product to highlight it to add to cart.
7. There are two ways to select multiple items:
 - a. Press **Shift** on the keyboard and then select multiple items in a *contiguous* list.



Nickname	Qty	Catalog No.
3Com Etherlink Server NIC Card 10-pack-----	----1	#330303-----
Acco Premium Silverette Paper Clips, Jumbo, Box Of	----1	#808899-----
Acco World Brand Paper Clips, Jumbo, Box Of 100 Cl	----1	#808907-----
Adaptec ANA-62022 PCI NIC Card, 5-pack-----	----1	#228114-----
Battery-----	----1	#0764-----
Great White Inkjet 24 Paper, 8 1/2" x 11"-----	----1	#680009-----

- b. Press **Ctrl** (Windows) or and then select multiple items in a *non-contiguous* list.

Nickname	Qty	Catalog No.
3Com Etherlink Server NIC Card 10-pack-----	----1	#330303-----
Acco Premium Silverette Paper Clips, Jumbo, Box Of	----1	#808899-----
Acco World Brand Paper Clips, Jumbo, Box Of 100 Cl	----1	#808907-----
Adaptec ANA-62022 PCI NIC Card, 5-pack-----	----1	#228114-----
Battery-----	----1	#0764-----

8. Click the **Add to Current Cart** button. The favorite or favorites are added to the cart.

Task 2: Add Items from My Favorites Page

1. Select the **My Favorites** navigation menu. The **Active Folders** tab on this page is selected by default.
2. Browse through the list(s) of **Folders/Product Names**.
3. Click on any closed folder  to **expand** it and show its contents.
4. Click on any open folder  to **collapse** it and hide its contents.
5. To view additional product detail:
 - Click a product's **Select** checkbox and press the **Details** button to view additional product information or click on the product name to view additional information.
6. To add one or more items to the cart:
 - Edit the value in a product's **Quantity** field as necessary (to select a quantity other than the product's default value).
 - Click the product's **Select** checkbox, and press the **Add to Current Cart** button. Note: This also works to select and add multiple items.
7. To add the entire contents of a folder to the cart:
 - Edit the **Quantity** fields as necessary for any of the individual products within a folder.
 - Click on the **Select** checkbox next to that folder—this will select the checkbox next to all items in that folder—and select **Add to Current Cart**. This function will work with multiple folders or items.

ADDING ITEMS TO MY FAVORITES


Using the **Favorites** functionality, items that are referenced or ordered on a regular basis can be stored for easy access. Both **My Favorites** and **Company Favorites** options are controlled by permissions.

With the Favorites permissions items can be added to the respective Favorites section from the search results screen and the review page (when checking out). Two exercises are provided to demonstrate how to add favorites from each of these locations.


Step by Step

There are multiple ways in which to add items to your favorites, each of which is discussed below

Task 1: Add products from Search Results to Favorites

1. Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
2. On the **Search Results** page choose one or more items to add to Favorites.
3. Place a check in each item's **Select** checkbox.
4. Select **Add to Favorites** from the drop-down list box above or below the search results (as shown below), then click the **Go** button

5. The **Add to Favorites popup** displays. From there, determine what folder the item(s) will go into and what they will be named. Scroll through the list of existing Favorites Folders and select the appropriate destination folder.
 - If multiple items are selected, all will go into the same folder.
 - If an item requires a new destination folder, add that in the Favorites section and then add the product to it.
6. Edit each product's **Name** as necessary and set the default **Quantity** to store in Favorites.
7. Click **Submit** or **Cancel** as appropriate.

Task 2: Add a product from the Shopping Cart to Favorites

1. Shop for a few items and add them to the cart.
 2. Access the cart: click the cart link in the upper right-hand corner of the screen. The current cart displays in the order section of SelectSite.
 3. From the cart review page, choose one or more items to add to Favorites.
 4. Place a check in each item's **Select** checkbox.
 5. Select **Add to Favorites** from the drop-down list box above or below the search results (as shown below), then click the **Go** button
- 
6. The **Add to Favorites popup** displays. From there, determine what folder the item(s) will go into and what they will be named. Scroll through the list of existing Favorites Folders and select the appropriate destination folder.
 - If multiple items are selected, all go into the same folder.
 - If an item requires a new destination folder, add that in the Favorites section and then add the product to it.
 7. Edit each product's **Name** as necessary and set the default **Quantity** to store in Favorites.
 8. Click **Submit** or **Cancel** as appropriate.

CREATING FAVORITES FOLDERS AND SUB-FOLDERS


Favorites support the traditional **Folder/Subfolder** structure. Any folder structure can be created, in terms of adding new folders (if any) and nesting subfolders within them as appropriate.

Ideas for Favorites folder structure

- Products from a single supplier
- Products in a single commodity
- Products for a single department
- Top (n) products ordered
- Products for a particular experiment
- Products needed for new hires
- Products ordered every week
- Internal inventory specials

Step by Step

The goal of this exercise is to create a new folder or subfolder within Favorites.

1. **Login** to the system.
2. Select the **My Favorites** navigation menu.
3. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites Legend link in the upper right for a visual reference.
4. In the row for the **My Favorites** main folder, click the **New Sub Folder** button  to create a new folder. The Subfolder popup opens.
5. Give the new folder a **Name** and click **Save**.

6. Click the **New Sub Folder** button in the new folder's row to nest a folder within the new folder. Repeat

NOTE:

Users or administrators with sufficient permissions can add items to Organization Favorites.

the rest of the process as necessary.


COPYING ITEMS BETWEEN FOLDERS

Favorites support **copying** Favorites items from one folder to another. This might be done to copy a form from Company Favorites to personal Favorites, or to have a product included as part of several folders that are ordered frequently.

It may be helpful to copy items in multiple folders. For example, Standard Writing Pads might be added to a *Monthly Order* favorites folder as well as an *Office Supplies* favorites folder.

Step by Step

The goal of this exercise is to copy items from any Favorites folder for which they have permissions to any other for which they have Edit permissions.

1. **Login** to the system.
2. Go to the **My Favorites** navigation menu.
3. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** on the left for a visual reference.
4. In the row for the item to copy, click the **Copy to Folder** button. 
5. The **Copy Product popup** opens. Select the **Destination Folder** and click **Save**.

NOTE:


Users with the My Favorites and View Organization Favorites permissions can copy items from Organization Favorites.

MOVING ITEMS BETWEEN FOLDERS

Favorites support **moving** products from one Favorites folder to another. This may be necessary if a product is accidentally added to the incorrect folder or if a group of products was added to Favorites that need redistributing.

Step by Step

The goal of this exercise is to move items between any Favorites folders for which they have edit permissions.

1. Go to the **My Favorites** navigation menu.
2. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** link in the upper right for a visual reference.
3. In the row for the item to copy, click the **Move to Folder** button. 
4. The **Move Product popup** opens. Select the **Destination Folder** and click **Save**.


EDITING FAVORITE ITEMS AND FOLDERS

Once items have been set up as favorites, the name and/or quantity may need to be modified. These functions can be performed as-needed; the favorites will automatically be updated.

Step by Step

Two exercises are provided below – the first for editing favorites folders. The second for editing favorites items.

Task 1: Edit a Favorites Folder

1. Go to the **My Favorites** navigation menu.
2. Favorites defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** link in the upper right for a visual reference.
3. In the row for the folder to edit, click the **Edit Folder** or **Product** button. 
4. The **Edit Folder** popup opens. Update the **Folder Name** and submit or cancel as appropriate.

Task 2: Edit a Favorites Item

1. Go to the **My Favorites** navigation menu.
2. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** on the left for a visual reference.
3. In the row for the item to edit, click the **Edit Folder** or **Product** button.
4. The **Edit Product popup** opens. Update the **Product Name** and/or the default **Quantity** and submit or cancel as appropriate.


DELETING FAVORITE ITEMS AND FOLDERS

In Favorites, items or folders can be deleted as necessary. Sometimes items are no longer available, regularly ordered items change, or an incorrect item may have been added to Favorites.


Step by Step

Two exercises are provided below – the first for deleting favorites folders. The second for deleting favorites items.

Task 1: Deleting an Item from Favorites

1. Go to the **My Favorites** navigation menu.
2. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** in the upper right for a visual reference.
3. In the row for the item to delete, click the **Delete Folder** or **Product** button. 
4. The **Delete Product popup** opens and requests confirmation for deleting the item. Submit or cancel as appropriate.

Task 2: Deleting a Folder from Favorites

1. Go to the **My Favorites** navigation menu.
2. **Favorites** defaults to the **Active** tab. Select the **Edit Folders** tab. Note the Favorites **Legend** in the upper right for a visual reference.
3. In the row for the folder to delete, the **Delete Folder** or **Product** button. 
4. Once all products are deleted from the folder, the **Delete Folder or Product** button appears. Click it to continue.
5. The **Delete Product popup** opens and requests confirmation for deleting the folder. Submit or cancel as appropriate.

SHOPPING CARTS AND CHECKOUT

Lesson 7: SHOPPING CART FUNCTIONALITY

Key Concepts

SHOPPING CARTS

Shopping Carts represent items selected for purchase from the end user. Shopping carts contain line items that represent items, goods, or services being requested through SelectSite. The shopping cart process varies significantly for each customer due to the different SelectSite modules implemented, available functions in the shopping cart, fields required at checkout, and more. Listed below are some details related to shopping carts:

- For **Spend-Director only** sites, the shopping carts simply represent the items being requested. Since the approval process occurs outside of SelectSite, requested items do not necessarily equate to ordered items. In addition, header information is typically not tracked for shopping carts created in a Spend-Director only site.
- Users with **Shopping-only** permissions add items and/or requests to a cart, then assign the cart to another individual (requisitioner or approver) for submission.
- The term **requisitioner** is used to identify individuals that submit carts. In order to submit a cart, you must populate all required fields, such as accounting information (if applicable), shipping and billing information, and more.
- The shopping cart submission process is used to define and verify line item and header information prior to an order being sent out or beginning the approval process.
- Depending on the site setup, by submitting a shopping cart, the request may be processed as an order, begin the approval process, or be exported to a third-party system.

Exercises

ADDING ITEMS TO THE CART

Items can be added to the cart through many of the screens in the application. Listed below are the different places where products can be found:

- Product Search Results – hosted items, favorite non-catalog and forms requests
- Product Details Popup
- Product Comparison
- Home page Favorites
- Quick Order
- Forms
- Punch outs
- Favorites page
- Completed Requisitions

- The exercises below demonstrate adding items to the cart from the various locations listed above. Unless otherwise noted, whenever an item is added in each of the exercises below, the system will confirm the total quantity of items added to the cart:

1 item(s) added to the cart.

The **Cart** button in the upper right corner updates reflecting the total quantity and cost of items in the cart:


BEFORE:  2005-08-21 jdoe | 0 item(s), 0.00 USD



AFTER:  2005-08-21 jdoe | 1 item(s), 174.90 USD

Step by Step


The goal of this exercise is to demonstrate adding products to a cart via multiple methods in the system. This exercise is broken down by task.

Task 1: Add items from the Product Search Results page.

- Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
- To add a single item to the cart, set the desired **quantity** and click the **Add to Cart** button .
- To add more than one item to your cart:
 - Set the desired **quantity** for each item or leave the default quantity of 1.
 - Enable the checkbox for each item under the **Select** column.
 - Select **Add to Current Cart** from the drop-down list box above or below the search results (as shown below), then click Go.

Add To Current Cart  

- If items appear across multiple pages of search results, there are two options:
 - Add items from the first page and then repeat the process as appropriate for the subsequent pages.
 - Perform a new search by using the same keywords and selections, except change the number of products that display per page. This is the last field on the search screen. When the new list of products display, select from the list of items.

Products per page 20 

Task 2: Add items from the Product Description popup

- Search for products using any of the search tools mentioned in this handbook. Search Results display at the bottom of the screen.
- Click on an item's **Product Description** to open its Product Details popup.
- Set the desired quantity and click the **Add to Cart** button.

Task 3: Add items from Product Comparison

- Open the Product Comparison screen as described in

Using the Comparison Function on page 82. From this screen, items to cart in one of two ways:

2. Click the **Add to Cart** button for a single item.

OR

3. Place a check in the desired items' **Select** checkboxes and choose **Add to Current Cart** in the Action Dropdown list (above or below Comparisons table).

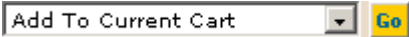
Task 4: Add items from Favorites on the Home Page

1. The **Home page** defaults to the last tab the user visited. Select the **Favorites** tab.
2. From the dropdown **folder** list, select the folder from which to choose products.
3. Select the product(s) to add to cart.
4. Press the **Add to Current Cart** button. In this instance, the system does not provide a message detailing the number of items added to the cart, it only updates the **Cart** button details.

Task 5: Add items from Quick Order

1. The **Home page** defaults to the last tab the user visited. Select the **Quick Order** tab and search for an item.
2. If Quick Order finds an exact match it will automatically add the product to the cart. The system also provides a comprehensive message about what was added, including Catalog Number, Description, and Supplier. The quantity is always 1
3. If it finds multiple items that meet the search criteria the system will present the standard Product Search Results screen.

Task 6: Add items from Forms

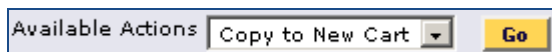
1. The **Home page** defaults to the last tab the user visited. Select the **Forms** tab.
2. Choose either the **Non-Catalog Form** in the **Form Options** section or some other form in the **Forms** section and complete the form as necessary.
3. Select **Add to Current Cart** from the Action Dropdown list (above or below the form)

4. The system adds the form to the cart and takes the user to the cart.
See **Using Forms** in Lesson 6 for additional details about how to use Forms.

Task 6: Add items from Punch outs

1. The **Home page** defaults to the last tab the user visited. Select the **Product Searches** tab and select an active punch-out.
2. The application redirects to the supplier's punch-out site.
3. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).
4. Use the supplier's mechanism to return products to SelectSite (this process again varies from punch-out to punch-out).
5. Upon returning to SelectSite the user will be on the cart page.

Task 7: Add items from Punch outs

1. The system defaults to the user's **Home** page. Select the **Order History** link.
2. Find a **completed requisition**. Click on the **Requisition No.** in the Order Search Results.
NOTE: Refer to the History Lesson for more information on this topic.
3. Select **Copy to New Cart** from the Action Dropdown list (above the Requisition Summary section) and click **Go**.



4. The system automatically creates a new cart and adds the items to it.
5. In this instance the system does not provide a message detailing the number of items added to the cart; instead it takes the user to that new cart.

REMOVING ITEMS FROM THE CART

Items can be removed from shopping carts either individually or all at once. Items are typically removed when it is determined that another product is needed instead, the item does not fit (due to cost, quantity, etc), or accidental selection.

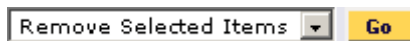
SelectSite allows the removal of items from the cart, regardless if the item is from a form (services, goods, etc), a punch-out item, hosted catalog item, or non-catalog item.

Step by Step

The goal of this exercise is to show how one or more items can be removed from a shopping cart.

Task 1: Remove selected items from a cart

1. Go to a shopping **cart** with items in it.
2. In the cart select one or more items to remove:
3. Place a check in the **Select** checkbox in the row for each item to remove. For this exercise, leave at least one item in the cart.
4. Choose **Remove Selected Items** in the available actions list box (above the items in the cart), and click **Go**.



The system **removes** the selected items and updates the **Cart** button totals in the upper right corner of the screen.

Task 2: Remove All items from a cart

1. Go to a shopping **cart** with items in it.
2. Choose **Remove All Items** in the Action Dropdown list (above the items in the cart)—it is not necessary to select any checkboxes.



3. Press **Go**.
4. A **confirmation popup** opens. Choose **OK** to remove all items or **Cancel** to stop.
5. The system **removes** all items and updates the **Cart** button totals in the upper right corner of the screen.

UPDATING ITEMS IN THE CART

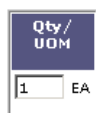
Once products have been added to the shopping cart, it may be necessary to change some of the product information, such as quantity or unit price. There are different procedures for updating items from a hosted catalog, punch-out supplier, and non-catalog/form items. This exercise discusses the update options that are available.

Step by Step

The goal of this exercise is to demonstrate the available functionality around updating items in your cart. This exercise is broken down by task.

Task 1: Update the Quantity of a Hosted Catalog Item

1. Go to a shopping **cart** with a **hosted catalog item** or a **form** in it.
2. In the **Qty/UOM** field of the row for the product to modify enter the desired quantity.

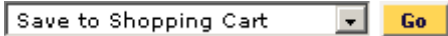


3. Click the **Save Updates** button at the bottom of the page.



The **TOTAL** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised amounts.

Task 2: Update information from a Form or non-catalog item (accessed via the cart)

1. Go to a shopping **cart** with a form or non-catalog item in it.
2. Click on the **Product Name** in the row for the form.
3. The complete form opens.
Update the appropriate fields (catalog #, price, etc)
4. Select **Save to Shopping Cart** from the Action Dropdown list (above or below the form)

5. The form refreshes on the screen and the **Cart** button totals update based on the new price.
6. Click on the **Cart** button to return to the current cart.

Task 3: Update a Punch-out Item

1. Go to a shopping **cart** with a **punch-out catalog item**.
2. In the **Qty/UOM** field of the row for the product to modify enter the desired quantity.



3. Click the **Save Updates** button at the bottom of the page.



The **TOTAL** at the bottom of the page and the **Cart** button in the upper right corner of the application both update with the revised amounts.

4. To select a different item or change configuration settings, you must select the punch-out item and go back to the punch-out site to make changes.

REVIEWING LINE ITEM HISTORY


The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases.

To perform this task, users must be assigned the View Line Item History permission, which applies to both hosted catalog and punch-out items only.

Step by Step

The goal of this exercise is to review a line item's purchasing history.

1. Add **hosted catalog** or **punch-out items** to a shopping cart.
2. Access the shopping **cart**.
3. Enable the **Select** checkbox for the item, then select **Line Item History** from the drop-down box above the items (For selected line items checkbox). An example is shown below.

Supplier / Line Item Details									
Show line details				For selected line items					
VWR SCIENTIFIC INC  more info...				<div> <div>Add To Favorites</div> <div>Add To Favorites</div> <div>Remove Selected Items</div> <div>Remove All Items</div> <div>Move to Another Cart</div> <div>Add to Draft Cart or Pending PR/PO</div> <div>Add to PO Revision</div> <div>Line Item History</div> </div>					
Product Description		Catalog No		Size / Pack					
1	STERILE WATER F/INJ 5000ML CS2 [BAXTER IV SOLUTIONS / 2B0309] Sterile Water for Injection more info...	68000-955 (CS)		CS		27.59	1	CS	27.59
						Select price or contract...			
2	STERILE WATER F/INJ 5000ML CS2 [BAXTER IV SOLUTIONS / 2B0309] Sterile Water for Injection more info...	68000-955 (CS)		CS		27.59	1	CS	27.59 <input checked="" type="checkbox"/>
						Select price or contract...			
3	STERILE WTR FOR INJ 500ML 24CS 500ML [B BRAUN / L8501-01] more info...	32500-216 (CS)		500ML CS		262.77	1	CS	262.77 <input type="checkbox"/>
						Select price or contract...			
Supplier subtotal								317.95 USD	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.								Subtotal	317.95
								Total	317.95 USD

4. The **Line Item History** popup opens.
 - a. **Previous Purchases Found:** An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including Quantity, Date, User ID and User email Address.
 - b. **No Previous Purchases Found:** An item having no previous purchases meeting the organization's timeframe, department, and custom field criteria (if any) will display the item's description and a message that no items were found. An example is show below.



DELETING SHOPPING CARTS

SelectSite has no restrictions on the number of draft shopping carts that can be created. Occasionally certain carts may no longer be needed; therefore, SelectSite allows you to delete the deletion of entire shopping carts with one click.

Step by Step

The goal of this exercise is to delete a draft shopping cart.

1. Select the **Carts** navigation tab, then select the **draft carts** sub-tab.
2. Find the cart to delete, whether it is the current cart (in blue) or a draft cart (in white).

3. Press the **Delete** button on the right side of the screen. Consolidated carts with items in them appear with the **Delete** button inactive (grayed out).

IMPORTANT:

The system allows deleting standard carts with products in them, but it prohibits deleting consolidated carts with products still in them. To delete a consolidated cart, delete (remove) the items from the cart, then delete the folder.

4. After selecting **Delete**, the system deletes the cart immediately. **Once a cart is deleted, it is permanently removed and it cannot be restored.**


CREATING NEW/DRAFT CARTS

New carts can be created whenever necessary. Additionally, draft carts can be created for future use. With sufficient permissions, consolidated carts can be created as well.



Creating draft carts may be useful for setting up orders that are similar or that might be used later, i.e. standing orders or daily consolidated carts.

Details about the cart icons:

The **current** cart's icon is always highlighted in blue, whether Standard or Consolidated carts:

- **Standard** (non-consolidated) cart: 
- **Consolidated** cart: 

Other **draft** carts have a white background:

- **Standard** (non-consolidated) cart: 
- **Consolidated** cart: 

Step by Step

The goal of this exercise is to create new carts and navigate through their draft carts.

1. Go to the **carts** navigation tab.
2. From the **current cart** or **draft carts** sub-tab, select the **Create Cart** button.
3. The empty cart displays. Begin entering information in the cart.

REVIEWING CART HISTORY

A History tab has been added to track activity that occurs previous to submitting a cart. This new tab is located in the Review Cart area, which can be viewed when checking out and reviewing a cart. The cart history provides a LISTING of the current line items in the cart. As items are added, a line in History is added and as items are removed from the cart, the line is removed. (NOTE: A "delete" line is not created in history). History also indicates the following:

- If an item was selected from a favorite
- Details about cart assignment (if applicable), including what user was assigned the cart and when the assignment occurred.

- If the cart was created from a previous cart, and if so, the Requisition # of the previous cart.
- When items were added and by who, the product name, and line number.

NOTE: Once a cart is submitted, the cart history is removed and a snapshot of the requisition at that point is taken.

Step by Step

The goal of this exercise is to review the history for a cart.

1. Add **hosted catalog** or **punch-out items** to a shopping cart.
2. Access the **shopping cart**, then click the Review tab (across the top of the screen).
3. Select the **History** sub-tab as shown below:



4. The history for the draft cart is displayed, as shown below. As with other History trails, you can filter by date or action (approvals, modifications, etc).

Requisition

PR Approvals

PO Preview

History

+ Click to filter history

?

Export CSV

History

?

Results per page 20

Records found: 4

Page 1 of 1

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
Line 4	2/21/2008 4:43 PM	Ashlee Hartman		New Line added - draft	Copy Paper	favorites		
Line 2	2/21/2008 4:43 PM	Ashlee Hartman		New Line added - draft	5005720141L	Product search		
Line 1	2/21/2008 4:42 PM	Ashlee Hartman		New Line added - draft	179100	Product search		
Line 3	2/21/2008 4:42 PM	Ashlee Hartman		New Line added - draft	01192-6X1KG-R	Product search		

5. If desired, you can also export the information via a CSV file by clicking the **Export CSV** button.

Lesson 8: CHECKING OUT

After completing all shopping, the checkout process begins. The complexity and steps involved in checking out varies per organization and per user.

Key Concepts

ASSIGNING A CART

Some organizations set up different “levels” of users where some of the users simply shop for items, but are not required to submit the cart. This is a nice feature, especially when the individuals ordering the items do not know the appropriate accounting codes and billing/shipping addresses.

From a terminology perspective, **shoppers assign carts to an assignee**. An assignee represents a requisitioner or approver that can submit the cart. Once the cart is submitted, it becomes a requisition and the workflow process is initiated. A shopper can assign a cart without all of the required information populated such as shipping information. In order to submit a cart, all required data must be selected.

With the standard setup, when assigning a cart to a user, one of the following occurs:

- If a default assignee is defined in the user's profile, this user displays by default. This selection can be defined by an administrator or the user if the user has the **Edit User's Cart Assignees** permission. Note: It is also assumed that the user has the **Assign Cart to Another User** permission enabled.
- If the assigned is not pre-defined, the user can click the **Click from Profile values** link to select from the user(s) set up in the user's profile, which may or may not be set up by an administrator. If no values are set up in the profile, this option does not display.

FOR MORE INFO:

To learn more about the assign cart functionality, including how a cart is assigned and how it can be unassigned (withdrawn), refer to **Assigning a Cart to a Requisitioner** on page 105. To learn about reviewing/approving an order assigned to **Reviewing a Cart Assigned to Me** on page 106.

- If the assigned is not pre-defined, the user can click the **Click to select the assignee link** to select from a list of available assignees. In order to be listed as an assignee, the user must have the **Prepare Req for Another User** permission. Note: In order to search for an assignee, the user must have both the **Edit my Profile** and **Edit User's Cart Assignees** permission.

Setup for a Shopper

Shoppers are typically allowed to shop, but cannot place an order, and instead are allowed to assign a cart to an assignee. A shopper can selected from a pre-defined list of assignees (determined by an administrator or the shopper depending on setup), or can search. Related permissions (NOTE: These must be set up by an administrator):

- **Hosted Catalog Search** and **Punchout** – These permissions are typically granted for shoppers
- **Do not permit Place order** – This permission should be enabled if the shopper should not be allowed to submit a cart, which is the standard setup for shoppers. In some cases, you may have a user that is a dual shopper/requisitioner where they have the option to assign the cart or submit it, and in this case, this permission should remain disabled.
- **Assign Cart to Another User** – This is in essence, the “assign cart” permission.

- **Edit My Profile** and **Edit user's Cart Assignees** – These permissions required in order for a user to set up his/her own assignees via his/her profile or search for a user. In some cases, this option will be disabled if an administrator is setting the assignee(s) up.

Setup for an Assignee

A shopper “passes” a cart to an assignee, or requester. In order to be an assignee, the following permissions must be enabled: (NOTE: These must be set up by an administrator):

- **Hosted Catalog Search** and **Punchout** – These permissions are typically granted for assignees.
- **Prepare Req for Another User** – This permission is required (enabled) to be considered an assignee
- **Do not permit Place order** – This permission should be disabled so that he/she **can** place orders.
- **Assign Cart to Another User** – This is typically turned off for assignees, but occasionally will be enabled in the case of dual shopper/requisitioner role.

Email Notifications

Additionally, if you - as the requester – would like to receive email notifications from carts that were assigned to you and submitted, enable the following email preference: **Receive PR and PO Notifications for Cart Assigned to Me**. Email preferences are set up via the profile. By enabling this option, you will receive emails for the submitted carts based on your “standard” email preferences – workflow notifications, rejection notices, cancelations, ship notices, and backorder.

Assign Cart by Department setup

An option is available that allows an organization to control the list of possible “assignees” by **department** when assigning a cart to a user. Note: This option must be enabled by SciQuest prior to the following configuration. With this option, when the **Click to select the assignee** link is selected, the list of possible assignees are only those users that meet the following criteria:

1. The assignee has the **Prepare Req for Another User** permission enabled (standard criteria).
2. The assignee is a member of the department – or departments - that the original requester (user) has access to via Department Permissions (in the profile). The assignee's department is defined on the User Settings → User Identification sub-tab of their profile. If a user does not have any departmental permissions assigned then they will have access to the entire organizational list of assignees. Also the permissions view all company orders supersedes the departmental permissions in association to the assign by department. So if a user has view company orders they will see the entire list of assignees in the system no matter what their departmental permissions are.

With this option enabled, there are a few caveats and details to mention:

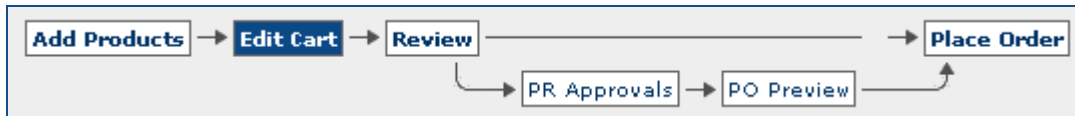
- A user's department DOES NOT determine what assignees are available to them. The department – or departments – assigned to the user via Department Permissions determines the list of assignees. Keep in mind, Department Permissions also controls access to history. For example, if the *Administration Department* is assigned to a user in Department Permissions, not only does it work to control the list of assignees, but also allows the user full access to PR and PO history for the Administration department.
- If a user is not assigned to a department in their profile, they will not be available as an assignee with this option enabled unless the original requester has access to **View Organizational Orders**.

SUBMITTING A REQUISITION: THE CHECKOUT PROCESS

SelectSite allows requisitioners to submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or sent to an outside system for processing.

The checkout process is accomplished through the **carts** navigation tab. From the **current cart** sub-tab, you can see the following buttons on the screen. These buttons represent the activities required to complete and

process an order. Depending on the application and functionality enabled, some of these buttons may not be visible. Also, these buttons may be named differently on-site. An explanation of each of these sections is provided below:



- **Add Products** allows further shopping in the application.
- **Edit Cart** provides a high-level look at the items to order and header information such as priority, accounting date, user name, and header-level internal and external attachments. Remove or edit line items from this screen.
- **Review** provides a detailed look at each line item, including where it should be shipped, custom field values for each line item, and more.
- **Taxes/S&H** provides a detailed look at taxes, shipping, and handling assigned for each line item.
- **PR Approvals** provides a read-only workflow diagram detailing the process the requisition must go through to be sent to the supplier.
- **PO Preview** allows the user to see a snapshot of what the PO will look like when processed.
- **Place Order** is the button used to begin the checkout process. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. Note: Checkout will not occur until all system errors are corrected.

Exercises

ASSIGNING A CART TO A REQUISITIONER

Some organizations use the assign cart function to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

In this exercise, we will look at the first step in the “assign cart” process where the shopper adds items to his shopping cart, possibly fill out details about the order such as accounting codes and shipping addresses, then assigns the cart to an assignee. From there, two things can happen:

- The assignee can review the order and submit it – as discussed on Reviewing a Cart Assigned to Me on page 106.
- The shopper can withdraw his/her order, which will allow the shopper to either hold the cart or re-assign it to a new assignee. For more information, refer the last step of the exercise below.

For details about the assign cart feature, including the assignee having the appropriate permissions, refer to Assigning a Cart on page 103.

Step by Step

The goal of this exercise is for an assignee to access shopper to add items to his cart, then assign it to an assignee for review and submission. Note: It is also assumed that the shopper has the **Assign Cart to Another User** permission enabled.

1. Add one or more items to your cart.
1. Click the **Shopping Cart** button in the upper right corner to go to the active cart.
2. Populate any header or line details that you know. Keep in mind, custom fields and billing/shipping details are not required by shoppers, and in some cases, a shopper may not be able to see these fields.
3. In the upper right-hand corner, click the **Assign Cart** button. The Assign Cart popup displays. An example of this screen is shown below.

Assign Cart ? | X

Assign Cart To:

Matt Boge
[Select from profile values](#)
[Search for an assignee](#)

Note To Assignee:

[expand](#) | [clear](#)

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign
Cancel

4. Determine the assignee:

- If a preferred assignee is defined in the user's profile, this user displays by default (as shown above). This selection can be defined by an administrator or the user if the user has the [Edit User's Cart Assignees](#) permission.
- If the assigned is not pre-defined, the user can click the [Click from Profile values](#) link to select from the user(s) set up in the user's profile, which may or may not be set up by an administrator. If no values are set up in the profile, this option does not display.
- If the assigned is not pre-defined, the user can click the [Click to select the assignee link](#) to select from a list of available assignees. In order to be listed as an assignee, the user must have the [Prepare Req for Another User](#) permission. Note: In order to search for an assignee, the user must have both the [Edit my Profile](#) and [Edit User's Cart Assignees](#) permission.

5. OPTIONAL: Enter a note to the assignee, perhaps describing the items requested, how the items were selected, or any other information about the order.
6. Click [Assign](#). A shopping cart notification displays.
7. To view the previously assigned cart prior to it being submitted by the assignee, you can access it via the [carts → draft carts](#) tab as shown below. Click the [View Cart](#) icon to view details of the cart that was assigned or click the [Unassign](#) button to withdraw the cart assignment. From there, carts can be updated and/or reassigned.

home

my favorites

product search

carts

approvals

history

settlement

more >>

active cart

draft carts

my favorites

my requisitions

Create Cart

Create Consolidated Cart

My Drafts

legend | ?

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2008-02-21_sq_ahartman 01	2/21/2008		166.31 USD	<div>Delete</div>

My Drafts Assigned to Others

legend | ?

View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	2007-07-02_sq_ahartman 01	7/2/2007	Matt Boge	964.00 USD	<div>Unassign</div>

REVIEWING A CART ASSIGNED TO ME

Some organizations use the assign cart function to allow shoppers to submit orders to a requisitioner or approver for review, completion, and validation. For example, the original shopper may select the items, but the cart assignee is needed to enter the appropriate accounting codes.

This exercise focuses on the second part of the “assign cart” process where the shopper has already submitted the cart and it is awaiting review by the assignee (the user in this exercise).

- In order to be an assignee, the [Prepare Req for Another User](#) permission must be enabled.
- It is recommended that assignees enable the [Cart Assigned Notice](#) email notification via his/her profile ([Profile](#) → [User Settings](#) → [Email Preferences](#) → [Cart Assigned Notice](#)).

For details about the assign cart feature, including the shopper having the appropriate permissions, refer to Assigning a Cart on page 103.

Step by Step

The goal of this exercise is for an assignee to access a cart that was assigned to him/her.

1. Once the shopper’s cart is submitted, the assignee should receive an email if the notification listed above is enabled. There are two additional ways that an assignee can find about any orders requiring review:
 - a. From the [Home](#) page, “[Carts assigned to me](#)” are listed in the Review section below the Organizational Message. This link can be clicked to access the screen below.
 - b. Navigate to the [carts](#) → [draft carts](#) sub-tab. A table named [Drafts Assigned to Me](#) displays any carts requiring submission.

Drafts Assigned To Me					legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2008-03-13_sq_ahartman 01	3/13/2008		592.80 USD	Delete

2. Click on the shopping cart name to review the order. Once all required fields are completed and the order reviewed, it can be submitted as normal. Standard cart changes – such as removing and adding line items, and changing quantities is allowed.

Caution: The Delete button will delete the cart from the system and the original requester will no longer be able to access the order.

ASSIGNING A SUBSTITUTE REQUISITIONER (FOR ASSIGN CART)

When a cart is assigned to an assignee, or requester, the cart must be submitted in order for processing to begin. If a requester is on vacation or leave, he/she can assign a [substitute](#) requisitioner to assist with the cart submission. The substitute is able to review the cart assigned to the original assignee.

When a cart is reassigned to a substitute requester, the original shopper will be notified via email.

Step by Step

The goal of the exercise is to assign a substitute assignee for processing assigned carts. This can be set up for a short period (a few hours) or a lengthy period (for example, extended leave).

1. Navigate to the [carts](#) navigation tab.
2. Click the draft [carts](#) sub-tab.
3. Click the [Assign Substitute](#) link, as shown below.

Organization **Shopping Cart - Drafts** Search for Supplier Profile

home | my favorites | product search | **carts** | approvals | history | settlement |

active cart | **draft carts** | my favorites | my requisitions

My Drafts						legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total		Delete
	2008-02-21_sq_ahartman 01	2/21/2008		166.31 USD		<input type="button" value="Delete"/>
	2008-03-14_sq_ahartman 01	3/14/2008		84.22 USD		<input type="button" value="Delete"/>

My Drafts Assigned to Others						legend ?
View Cart	Shopping Cart Name	Date Created	Assigned To	Total		Unassign
	2007-07-02_sq_ahartman 01	7/2/2007	Matt Boge	964.00 USD		<input type="button" value="Unassign"/>

- From the **User Search** popup, enter the criteria to find the user that you would like to assign as the substitute requester. Once the user criteria are entered, click the **Search** button.
- Select the appropriate user using the radio button to the left of the user's name (**Select** button)
- Click the **Choose Selected User** button to assign that individual as the substitute.
- Click **End Substitution** button on the draft carts to remove the substitution setting.

POPULATING HEADER DETAILS

When creating a requisition, a user can add various details to the Header Information section, such as Priority, Internal Notes and Accounting Date. This provides the end user the ability to ensure that the requisition is handled appropriately.

Step by Step

The goal of this exercise is to review and complete the fields at the header section for a requisition before placing the order. Note: The fields available at the Header level vary per organization.

- Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
- The initial screen presented is the Edit Cart. Some, or all, of the fields will be available on the screen:
 - Priority** - Allows user to indicate if the requisition is Urgent. Workflow can be set up to speed up processing of such urgent requisition.
 - Description** - Allows user to add a brief description for the requisition.
 - Prepared For** - Allows user to prepare the requisition for a different user. (Described in "Placing Orders for Other Users")
 - Internal Note** - Allows user to add a detailed note to the requisition that is available to approvers as the requisition goes through workflow. Such note is not sent on to suppliers.
 - Attachments** - Allows user to attach files in various formats or links to websites. These are available to approvers as the requisition goes through workflow. Such attachments are not sent on to suppliers.
 - Note to All Suppliers** - Allows user to add a detailed note to the requisition which is available to approvers and is sent on to suppliers with the PO. The note is sent with all POs that are generated from the requisition.
 - Accounting Date** - Allows user to associate an accounting date with the requisition.
- Click the **Save** button to save the header information. Continue to the next exercise to update line item details.

POPULATING LINE ITEM DETAILS

In a requisition, various details such as Ship To 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. User can modify the values – per line item – as needed. This ability allows the user to ensure that each line item in the requisition has appropriate information associated with it.

Depending on the user's permissions and the application customization, access to line item details and custom fields vary.

Step by Step

The goal of this exercise is to review and complete the fields at the line level in a requisition before submitting the order. Note: The fields available at the line level vary per organization.

1. After reviewing information at the header level (previous exercise), click the **Review** button across the top of the window.
2. Click the **Hide Header** button to show line information only. Click on **Show Header** to display Header information. This option is located in the upper left-hand side of the window.
3. Scroll down to the Supplier/Line Item Details area of the screen. The current selections display for each line item, and are grouped by supplier. For example, if accounting codes were selected at the header level, they are filtered down to the line level here. To modify any line level selections:
 - a. Click the **Show line details link** at the beginning of the supplier/line item details section. The line item will look similar to the one below:

Product Description			Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	Catered Lunch	more info...			13.90	1	13.90 USD	edit
Event Date	6/30/2008	Taxable	✓	External Note	no note			
Event Time	3PM	Capital Expense	✗	Attachments for supplier				
Location	MY HOUSE	Commodity Code	Miscellaneous					
more info...		Replenish stock	✗					

Click the edit button on the right side of the window to make any changes to the line item, including the assigned commodity code. NOTE: Commodity codes can now be searched via a drop-down box. If there are fewer than 50 commodity codes, the options will be listed in the drop-down box.

- b. To edit specific information for the requisition, use the tabs across the top of the cart screen as shown below (shipping, billing, etc):

Requisition			PR Approvals			PO Preview		
Summary			Shipping			Billing		
Accounting Codes			Supplier Info					
Accounting Codes								
<i>These values apply to all lines unless specified by line item</i>								
Account Number			Department			Budgeted?		
no value			no value			✗		

- c. Scroll down to make changes to specific line items.
4. Tips on making changes at the line level:
 - a. Whenever possible, set up the information about the requisition at the header level and work by exception at the line level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the "primary" code, then change the remaining 4.
 - b. Below is a list of common "sections" on a cart, along with a description of each:
 - **Bill To** - This section displays the address to which the invoice will be sent by the supplier.
 - **Ship To** - This section displays the address to which the item will be shipped by the supplier.

- **Delivery** - This section displays the delivery preferences such as shipping carrier, shipping date, and expedites flag.
 - **PO Number** - This section displays any specific PO Number to be used. If this field is blank, the application assigns PO Number as per rules set up in admin section.
 - **Credit Card Number** - This section displays any credit card to which the line item is being charged.
 - **Supplier Info** - This section displays any information that needs to be conveyed to the supplier such as Pricing Code, Account Code, and Note.
 - **Codes or Accounting Codes** - This section displays various codes used by the organization so that the purchase is billed to proper grant/financial source.
 - **Internal Info** - This section displays any internal note attached by the user.
- c. When making edits to a sections of the cart at the line level, you must scroll to the appropriate line and section, then click the **edit** link.
 - d. Line level notes: After creating line level notes – internal or external, you can copy this information to additional lines by selecting the **copy to other lines** link.
 - e. After populating custom fields for a line, you can copy this information to additional lines by selecting the **copy to other lines** link.
 - f. When modifications are made at the line level, the system will indicate this by displaying the unique information. Otherwise, you will see the **(same as header)** text.

ENTERING TAXES AND SHIPPING & HANDLING INFORMATION

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

Supplier details can be set up so that all line items for the supplier will be considered taxable. The four available fields – Tax1, Tax2, Shipping and Handling – can be set up for each supplier as appropriate.

User needs to have specific permission – Allow editing of Tax, Shipping, and Handling – for this ability.

Step by Step

The goal of this exercise is populate taxes and S&H charges for single/multiple line items in a requisition before placing the order.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. Click on the **Taxes/S&H** step of the shopping cart. Just under the Header Information is a section titled **Tax, Shipping & Handling**. This section displays all line items in the requisition, grouped by supplier. For each group of line items, taxes and any shipping and handling charges are displayed along with an **Edit** button.
3. Click on the **Edit** button for the appropriate group in the **Tax, Shipping & Handling** section and edit the following:
 - **Tax1** - This field is used for first tax line and has to be turned on in the supplier details section.
 - **Tax2** - This field is used for second tax line and has to be turned on in the supplier details section.
 - **Shipping** - This field is used for shipping charges and has to be turned on in the supplier details section.
 - **Handling** - This field is used for handling charges and has to be turned on in the supplier details section.
4. Make the desired changes.
5. Click on the **Save** and Apply to Selected Products button.

REVIEWING THE WORKFLOW PROCESS

SelectSite provides a visual representation of the workflow or approval process for a purchase requisition. Each step in the process is represented by a box, along with a description of the process or step. Each step represents a manual approval step or an automated system step.

Note: Before viewing the workflow process, all the required fields must be completed on the Review Page. If any required fields are not complete, an error displays at the top of the screen asking the user to fill in the required information. After all the required fields are populated, the user is then able to look at the workflow process.

SUGGESTION:

Once the Purchase Requisition workflow is complete, a Purchase Order is created. Additional approval steps may be required for the purchase order before it is sent to the supplier.

Step by Step

The goal of this exercise is review the workflow process of the requisition and assign financial approver to the Financial Approval step (if applicable).

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. Complete all required information for the shopping cart.
3. Click on **PR Approvals** after all the required values are populated. This allows review of the requisition approval process.
4. Review the workflow process.
5. Click on the label for the workflow step for more information and help will display. If a workflow step contains a drop-down box, then this is indication of a financial approval step where a user will be required to approve the requisition before advancing to the next (or final) step. To populate this drop-down list box, complete the following steps:
6. Click on the drop-down menu and select the preferred **Financial Approver**.
7. Click the **Update** button.

SUBMITTING THE SHOPPING CART

Users can submit a shopping cart to complete a requisition. The application validates the shopping cart for proper completion of cart details and, if necessary, prompts the user to correct/edit appropriate details.

Step by Step

The goal of this exercise is to complete the shopping process by submitting a cart.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more item in your shopping cart).
2. After reviewing and updating the order, click on the **Place Order** button in the shopping cart. If the order has any errors with associated details, the **Review** page is displayed with an error message in red font against yellow background. A specific error message is also displayed next to specific fields for each affected line item. The user can edit the values as needed (as described under the **Populating Line Item Details** section) and click on **Place Order** again to submit the order.
3. One of the following scenarios applies to each organization:

- If the organization has Requisition Manager, then a requisition is created by the application, and the appropriate workflow is applied to it.
- If the organization has Ariba, PeopleSoft or other such system, then the application passes through the contents of the shopping cart to the system for further order processing.

Lesson 9: MISCELLANEOUS TASKS

This section of the handbook contains miscellaneous tasks to help requisitioners and approvers perform their jobs.

Exercises

COPYING PREVIOUS REQUISITIONS TO A NEW CART

Users can copy requisitions into a completely new cart, providing a very convenient way to repeat an order. Items can be removed or additional products can be added to the cart if needed. This procedure is commonly done when orders are rejected or there is a problem for whatever reason. Instead of “restarting” the original order, a new order is created with a different number and date.

Note: Purchase requisition order history permissions are required to perform this task.

Step by Step

The goal of this exercise is to quickly reorder items by copying previous requisitions to a new cart.

1. Open the requisition to be copied:
 - a. Option A: Select **My Requisitions** from the home page. After the list of your requisitions displays, select the appropriate number.
 - b. Option B: Select the **History** tab, then select the **My Requisitions** sub-tab. After the list of your requisitions displays, select the appropriate number.
 - c. Option C: Select the **History** tab, then select the **PR History** Tab. Perform a **PR search**, and click on the appropriate requisition number in search results. Note: Depending on your permissions, you may be able to see your requisitions, departmental requisitions, or the entire organization's requisitions.
 - d. Option D: Select the **History** tab, then select the **PO History** Tab. Perform a **PO search**, and click on the appropriate requisition number in search results. Note: Depending on your permissions, you may be able to see your purchase orders, departmental purchase orders, or the entire organization's orders.
2. Select the **Copy to New Cart** action from the **Available Actions** drop-down box. This option is displayed as the default option of the Available Actions drop-down box on all tabs of a purchase requisition.
3. Select the **Go** button. A new shopping cart is created, and all line item(s) and requisition custom information are copied to this new shopping cart. The user is brought to Save Updates section of the new cart, and any previously open shopping cart is saved as a draft.

PLACING ORDERS ON BEHALF OF OTHER USERS

A user can place an order for another user in the application. This functionality is mostly used when a department administrator places an order for other individuals in their department. By indicating the person they are ordering the item(s) for, the original requester can still see their order via order history, and reporting information is not compromised.

Note: The original requester must have a username in SelectSite to perform this function.

Step by Step

The goal of this exercise is to place an order for another SelectSite user.

1. Create a new shopping cart by selecting **carts** and the **Create Cart** button under **draft carts**.
2. Click on **product search**, perform a search, and add appropriate items to the shopping cart. Once all the products are entered into the shopping cart, click on the shopping cart in top right part of the screen.

3. In the **Prepared for** field, click **Search**. The user search screen displays.
4. Enter appropriate search criteria (First Name, Last Name, Email, Department and Position are available fields), and select the **Search** button.
5. Select the desired user from the list of user(s).
6. Select the **Choose Selected User** button. The pop up window closes. On the shopping cart page, the **Prepared For** field now displays name of the selected user.
7. Select **Place Order** to complete the order.
8. The requisition is created in the name of the selected user and appears in My Requisition list of the selected user.
9. The values in the Details section of the requisition, such as Ship To and Bill To addresses and Codes, are the values from profile of the user who created the requisition and NOT profile of the selected user.
10. The header information of the requisition indicates the names of both the Prepared By user and the Prepared For user.

REVIEWING AND EXPORTING HISTORY

This section of the handbook focuses on reviewing and exporting historical data from SelectSite, including purchase requisitions, purchase orders, sales order, and receipts. Requisitioners can review the details of each requisition they have placed, along with any placed orders. Departmental administrators and approvers can review orders for their department.

Lesson 10: ACCESSING HISTORICAL DATA

This lesson focuses on performing searches, which allow you to access your purchasing and receiving data. Standard requisitioners typically can view their data only – requisitions, orders, and receipts that they initiated. For more information on viewing organization-wide orders, department orders, or orders that an approver has reviewed refer to the [Workflow and Approvals Handbook](#).

Concepts

HISTORY SEARCHING

The PR History, PO History, Sales Order History, and Receipt History tabs are used to review orders and receipts in SelectSite. The orders that a user can view and export is dependent on his/her permissions and access. Standard users will typically only be able to review their orders. Approvers can oftentimes review the orders for their department. Buyers and administrators can view system-wide orders.

The history searches are used to not only tell about “past” orders, but to access purchase requisitions and purchase orders in process to find out where they are in the workflow process. If an approver has the correct privileges, they can review an order after opening it via the History Search.

After searching for documents (PRs, POs, Sales Orders, or Receipts), the search results display at the bottom of the screen. From there, you can open individual orders and review details, including all changes and updates via the History tab.

PR and PO History

Details about any items that were rejected or approved are found in PO and PR History. Once a requisition becomes a purchase order, the data can be found through Purchase Order History, or by selecting the associated PO # link.

SCT Banner clients will also see messages from the Banner Financial system detailing the status of the requisition.

Purchase order history contains details about the purchase order process, including the items ordered and the associated requisitions. Additionally, information about order distribution is provided – including when the order was sent to the supplier and via what method.


Exercises

REVIEWING MY REQUISITIONS

Submitted requisitions are all shown in a convenient place – My Requisitions. The progress of requisitions can easily be followed from this central place. Once the requisitions have been completed, they can be removed from the My Requisitions list. They are still viewable through PR History, which is discussed later in this lesson.

Step by Step

The goal of this exercise is to easily access recently placed requisitions and follow their progress

1. Access **My Requisitions**. This can be done in one of two ways:
 - a. Navigate to the **Home** > Desktop page. On the left side of the screen under the **Review** section, the first item is **My Requisitions**. Click on the link to go to the My Requisitions screen.
 - b. Select the history navigation menu. Then select the **My Requisitions** sub-tab to go to the My Requisitions screen.
2. Examine the My Requisitions page. A table displays the following requisition details:
 - a. **Status**, **Requisition Number/Name** and **Requisition Date/Time** are displayed in columns.
 - b. Each column can be used to sort the table by clicking on the small white triangle under column name. The table is sorted by default on the Requisition Date/Time column.
 - c. A **Status** dropdown is displayed at the top left of the table header. It can be used to view requisitions in a specific status such as **Pending** or **Rejected**. By default, **All** requisitions are displayed in the table.
 - d. Click the **Requisition Number** to access details of the specific requisition.
 - e. The standard **Results per Page** selection dropdown and page navigation tools
 are available as well.
3. The last column in the table is **Remove Notification**. In this column, a **Remove** button is displayed for each of the requisitions. When clicked, the requisition is removed from the list and does not appear on the My Requisitions screen anymore. Requisitions can be accessed at any time from the history menu.

PR SEARCH BY PO NUMBER

Purchase Requisitions generated in SelectSite can be located using related purchase order information such as purchase order date, status, and number. A single purchase requisition or a group of purchase requisitions can be retrieved based on the search criteria provided. For example, a specific PR can be searched for using its PO number(s), all PRs created in the last month, all PRs in multiple statuses, etc.

PR Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase requisitions can be viewed for the entire organization, for one or more departments, or for one's own purchase requisitions.

In this exercise, purchase requisitions are searched for by Purchase Order number, along with additional criteria.

Step by Step

The goal of this exercise is to demonstrate how purchase requisitions can be located using PO Number as search criteria

1. Go to the **History** navigation tab.
2. Select the **PR History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by PO Number** tab. From there, searching can be done in a number of different ways, each of which is discussed below:
 - a. If the PO number is known, enter PO number in **the Purchase Order No field**.

- b. To search by criteria other than the PO Number, click on the **Filter** checkbox. The bottom of the page becomes available for data entry and selection. Additional search criteria can be entered, such as:
 - **My Orders** and **Company Orders** – select to search only my orders or other users' orders.
 - **Start Date** and **End Date** – enter a date bracket as search criteria.
 - **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
 - **PR Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
 - **PR Status** – select the desired PR status(es).
 - c. After entering the search criteria, click the **Search** button. The PR Search Results display. In this case it will display a single line for the PR.
4. From the PR Search Results screen, any of the following tasks can be performed:
 - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
 - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
 - Click the **Select Query** button to run an existing query. This button is also available through the PR History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

PR SEARCH BY REQUISITION

Purchase Requisitions generated in the application can be located using requisition name and requisition number as search criteria. A single purchase requisition or a group of purchase requisitions can be retrieved based on the criteria entered. For example, a specific PR can be searched for by its requisition number, all PRs with a requisition name starting with specific name fragment, etc.

PR Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase requisitions can be viewed for the entire organization, for one or more departments, or for one's own purchase requisitions.

In this exercise, searching is done by requisition number or name, along with additional criteria.

Step by Step

The goal of this exercise is to search and access PRs using PR Name/Number and other parameters, such as PR status, as search criteria.

1. Go to the **History** navigation tab.
2. Select the **PR History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by Requisition** tab. From there, a number of different searches can be executed, each of which is discussed below:
 - a. If the requisition number is known, enter it in the **Requisition No** field.
 - b. If the requisition name or part of the requisition name is known, enter it in the **Requisition Name** field. The search returns all PRs that start with the text entered in the field. For example, there are three requisitions in the system named *Month 1 Order*, *Month 2 Order*, and *Month 3 Order*. By entering *Month* as the search criteria, all three requisitions display. By entering *Month 1*, only the first requisition displays. By entering *2 Order*, only the second order displays.
 - c. To search by criteria other than the requisition name or number, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:
 - **My Orders** and **Company Orders** – select to search only my orders or other user's orders.
 - **Start Date** and **End Date** – enter a date bracket.

- **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
 - **PR Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
 - **PR Status** – select the desired PO status(es).
- d. After entering the search criteria, click the **Search** button. The PR Search Results display. In this case it will display a single line for the PR.
4. From the PR Search Results screen, any of the following tasks can be performed:
- Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
 - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
 - Click the **Select Query** button to run an existing query. This button is also available through the PR History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query

PO SEARCH BY PO

Purchase Orders generated in SelectSite can be located using various PO details as search criteria such as Purchase Order Number, Purchase Order Date, and status. A single purchase order or a group of purchase orders can be retrieved based on the search criteria provided. For example, a specific PO can be searched for using its PO number, all POs created in the last month, all POs sent to a particular supplier, all POs in multiple statuses, etc.

PO Search is performed in the History section of the application. Depending on the permissions and department access assigned, purchase orders can be viewed for the entire organization, for one or more departments, or for one's own purchase orders.

In this exercise, purchase orders are searched for by Purchase Order number, along with additional criteria.

Step by Step

The goal of this exercise is to search and access POs using various PO details as search criteria.

1. Go to the **History** navigation tab.
2. Select the **PO History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by PO Number** tab. From there, searching can be done in a number of different ways, each of which is discussed below:
 - a. If the PO number is known, enter PO number in **the Purchase Order No field**.
 - b. To search by criteria other than the PO Number, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:
 - **My Orders** and **Company Orders** – select to search only my orders or other users' orders.
 - **Start Date** and **End Date** – enter a date bracket as search criteria.
 - **User** – select a specific user as search criteria. To do so, click on the **Select User** button. A popup window is displayed in which search criteria can be entered to locate a specific user.
 - **PO Departments** – select department(s) from the provided list. Note: This is only available to those users with departmental permissions.
 - **PO Status** – select the desired PO status(es).
 - c. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO. For more information on accessing and viewing information from this interface, refer to
4. From the PO Search Results screen, you can perform any of the following tasks:
 - Click the **New Search** button to go back to search interface and perform a new search. Use this button when the POs displayed do not match your needs.

- Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. User can rerun a query easily without having to re-select the information.
- Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), you can confirm/alter the criteria, then run the query.

PO SEARCH BY REQUISITION

Purchase Orders generated through SelectSite can be searched using requisition information such as the requisition number or name. Users can access a single purchase order or a group of purchase orders based on these criteria. E.g. a specific PO by its requisition number, all POs with requisition name starting with specific name fragment etc.

PO Search is performed in Order History section of the application. Depending on the permissions and department access assigned, you may be able to view purchase orders for your entire organization, for one or more departments, or your own purchase orders.

In this exercise, you can search by requisition number, along with additional criteria.

Step by Step

The goal of this exercise is to search and access POs using requisition name/number as search criteria.

1. Go to the **History** navigation tab.
2. Select the **Order History**, then **PO Search** button from the column on the left side of the screen. (PO Search is selected by default). The Purchase Order Search page displays.
3. Click the **by Requisition** tab. From there, you can search a number of different ways, each of which is discussed below:
 - a. If you know the requisition number, enter this information in the **Requisition No.**
 - b. If you know the requisition name or part of the requisition name, enter this information in the **Requisition Name** field. The search returns all POs that start with the text entered in the field. For example, there are three requisitions in the system named *Month 1 Order*, *Month 2 Order*, and *Month 3 Order*. By entering *Month* as the search criteria, all three requisitions display. By entering *Month 1*, only the first requisition displays. By entering *2 Order*, only the second order displays.
 - c. To search by criteria other than the requisition name or number, click on the **Filter** checkbox. The bottom of the page is available for data entry and selection. The user can enter additional search criteria such as:
 - **My Orders** and **Company Orders** – user can select to search only his/her orders or other user's orders as well.
 - **Start Date** and **End Date** – user can enter a date bracket as search criteria.
 - **User** – user can enter a specific user as search criteria. User can click on the Select User button when a popup window is displayed in which user can search for a specific user based on user search criteria.
 - **PO Departments** – user can enter department(s) from list as search criteria. Note: This field is only available to those users with departmental permissions.
 - **PO Status** – user can enter various PO status(es) as search criteria
 - d. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO.
4. From the PO Search Results screen, any of the following tasks can be performed:
 - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
 - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
 - Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

PO SEARCH BY SUPPLIER/SKU

Purchase Orders generated in SelectSite can be located using Supplier Name and/or SKU as search criteria. A single purchase order or a group of purchase orders can be retrieved based on the criteria entered. For example, the following searches can be run: POs placed with a specific supplier, POs with specific SKUs, etc.

PO Search is performed in History section of the application. Depending on the permissions and department access assigned, purchase orders can be viewed for the entire organization, for one or more departments, or for one's own purchase orders.

In this exercise, searching is done by supplier data or SKU (catalog) number.

Step by Step

The goal of this exercise is to demonstrate how purchase orders can be searched using Supplier name or SKU number as search criteria.

1. Go to the **History** navigation path.
2. Select the **PO History** sub-menu. The Purchase Requisition Search page displays.
3. Click the **by Supplier/SKU** tab. From there, a number of different searches can be executed, each of which is discussed below:
 - a. Enter the supplier's full name in the **Supplier Name** field or click the **Select Supplier** button to locate and select a supplier from a list of existing suppliers.
 - b. To search by SKU, or Catalog Number or part thereof, enter this information in the **Catalog No. (SKU)** field.
 - c. To search by criteria other than supplier or SKU, click on the **Filter** checkbox. The bottom of the page is enabled for data entry and selection. Additional search criteria can be entered, such as:
 - **My Orders** and **Company Orders** – user can select to search only his/her orders or other user's orders as well.
 - **Start Date** and **End Date** – user can enter a date bracket as search criteria.
 - **User** – user can enter a specific user as search criteria. User can click on the Select User button when a popup window is displayed in which user can search for a specific user based on user search criteria.
 - **PO Departments** – user can enter department(s) from list as search criteria. Note: This field is only available to those users with departmental permissions.
 - **PO Status** – user can enter various PO status(es) as search criteria
 - d. After entering the search criteria, click the **Search** button. The PO Search Results display. In this case it will display a single line for the PO.
4. From the PO Search Results screen, any of the following tasks can be performed:
 - Click the **New Search** button to go back to the search interface and perform a new search. Use this button when the search does not produce the desired results.
 - Click the **Save Query** button to save the query (search criteria entered) by providing a name and description. Queries can easily be rerun, avoiding the need to have to reenter the search criteria.
 - Click the **Select Query** button to run an existing query. This button is also available through the PO History Search screen. After the query loads (i.e. – the fields and selections populate), alter the criteria if so desired and then run the query.

Lesson 11: USING SEARCH EXPORTS

This lesson focuses on creating and using search exports in SelectSite.

Key Concepts

SEARCH EXPORTS

SelectSite allows users and administrators to perform searches on purchase orders, purchase requisitions, receipts, and invoices. Based on a user's permissions, they may be able to search and review their data, data from their department (or a group of departments), or the entire organization. Searches are performed for a number of reasons, some of which are listed below:

- To see a full list of all requisitioner submitted by the user
- To see a full list of all orders placed by the user
- To determine what orders are pending for your department
- To determine month-to-date information (totals, supplier info, etc)
- To locate a purchase order or purchase requisition. You can locate a specific order or requisition by the user, the number, the department, the create/modify date, and more.
- To determine which orders have been received and over-received.

Historical data can be exported for use in reports or a third-party system. After a user requests a search export and the export is created (processed), the information can be accessed through SelectSite. By selecting a particular export, you can open a set of.csv files (stored as a zip file). From there, you can manipulate your data as needed.

NOTE: PR and PO History offer a feature that allows users to generate the export file without requiring a search to be performed first. This feature is available for purchase order and purchase requisition history. This feature is especially helpful when performing large or complicated searches that would normally take a few minutes to generate. In cases where the screen report is not needed – perhaps if monthly or weekly data is loaded into a reporting database, this step can be skipped.

NOTE:

An auto-delete feature is available in SelectSite where exported files are automatically removed after a certain number of days. Contact your administrator to see if this feature is being used and how long your files remain in the system before being removed.

A permission is associated with using search exports:

- **Export Search Results** – This permission, which is found in the [profile →permissions →orders](#) tab, allows a user to export whatever searches they are allowed to perform. For example, if a user is only allowed to search and view their data, they can only export their data. If a user has permission to view the entire organization's orders, they can also export this data. If this permission is turned on for a user, the search exports sub-tab displays from the History tab (as shown below):



There are three ways you can export your data, each of which is explained below:

- **Screen Export** – exports only the information available in the search results screen for each document.

- **Transaction Export** – exports an expanded set of information on the documents.
- **Full Export** – exports the same set of data as the monthly data extracts.

Exercises

EXPORTING PURCHASING AND INVOICING DATA

Users have the option of exporting data after PO, PR, Receipt, or Invoicing searches are performed. By performing searches and exporting the data, flexible, customized reporting data is available at any time.

Basics:

- You must have the appropriate search permissions to perform a PO, PR, Invoice, or Receipts search in SelectSite.
- You must have the **Export Search Results** permission enabled to export your data.
- You must have the **Manage Search Exports** permission to view company-wide exports.
- The maximum number of lines for an export file is approximately **100,000**.
- All export files will be zipped for consistency and convenience.

Step by Step

The goal of this exercise is to export search results, then access exported data from SelectSite. Note: For the purpose of this exercise, we will be exporting PO data, but you can also export PR, Invoice, and Receipt data.

1. Determine the criteria for the data to export. Based on your permissions and organization's setup, you can use any of the following history options.
 - Query purchase order data (PO History tab)
 - Query Purchase Requisitions or Submitted carts (PR History tab)
 - Query Receipts (Receipt History)
 - Query Invoices (Invoice History)

The screenshot shows the SelectSite web application interface. At the top, there is a navigation bar with tabs: home, my favorites, product search, carts, approvals, history, inventory, and more >>. Below this, there is a sub-navigation bar with tabs: PO History, PR History, my requisitions, and search exports. The PO History tab is currently selected. In the center of the page, there is a search form. At the top of the form is a 'Select Query' button. Below it are five tabs: by PO No., by Requisition, by Supplier/SKU, by Receipt, and by Invoice. The 'by PO No.' tab is selected. Below the tabs, there is a text input field for 'Purchase Order No.' with a placeholder text: 'If you know the PO No. of the PO you are searching for, please enter it below.' Below the input field is a 'Filter' checkbox with the text 'Check Filter if you want to use the filters below.' Below the checkbox is a 'Results per page' dropdown menu set to '10'. At the bottom of the form is a 'Search' button.

2. For PO and PR History, you can choose to Request Export without searching and viewing the printed report. If you are interested in this option, click the Request Export button and skip to Step 4.
3. If you are performing a search first, click search and the search results display. The exception is when there is no data that meets your criteria, in which case you will be notified with a warning message. From the search results window, click the **Request Export** button. A pop-up window displays.
4. Define the export:
 - Enter the **file name**. This is a required field and is the name that will be used to reference the export. We recommend using a meaningful name such as "ScienceDept2006POData" or "Jan07Requisitions."
 - Use the **description** to describe the export and its purpose.

- Select the **export type** from the drop-down list box. By default, the screen export is selected. An explanation of the types is listed below:
- **Screen Export** – exports only the information available in the search results screen for each document.
- **Transaction Export** – exports an expanded set of information on the documents.
- **Full Export** – exports the same set of data as the monthly data extracts.



Request Export ?

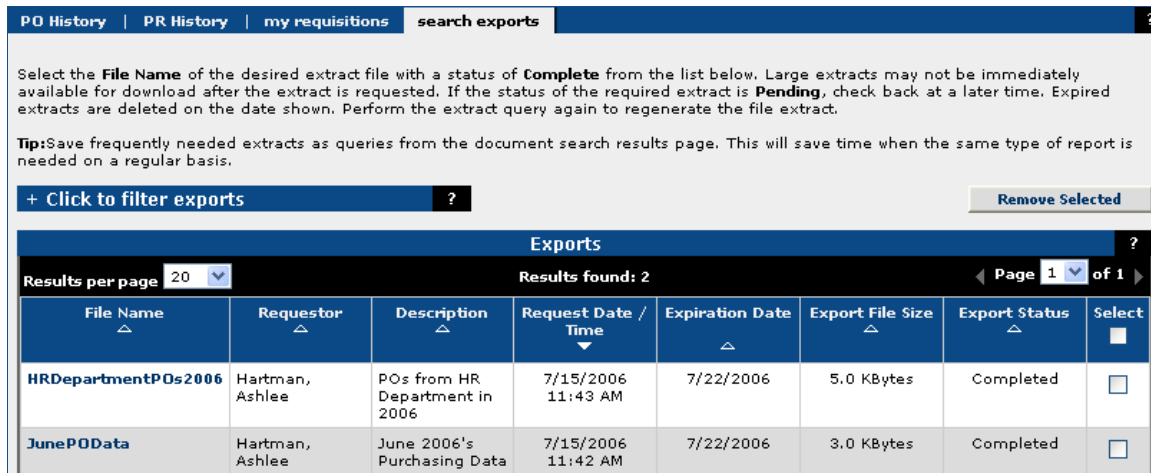
File Name

Description

Export Type

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

5. Click **Submit Request**. The system will begin the export process. Depending on the amount of data being exported, the export can take a few seconds or a few minutes.
6. View and access your export:
7. Go to the **history** navigation tab, then select the **search exports** sub-tab. Your export file should be listed.



PO History | **PR History** | **my requisitions** | **search exports** ?

Select the **File Name** of the desired extract file with a status of **Complete** from the list below. Large extracts may not be immediately available for download after the extract is requested. If the status of the required extract is **Pending**, check back at a later time. Expired extracts are deleted on the date shown. Perform the extract query again to regenerate the file extract.

Tip: Save frequently needed extracts as queries from the document search results page. This will save time when the same type of report is needed on a regular basis.

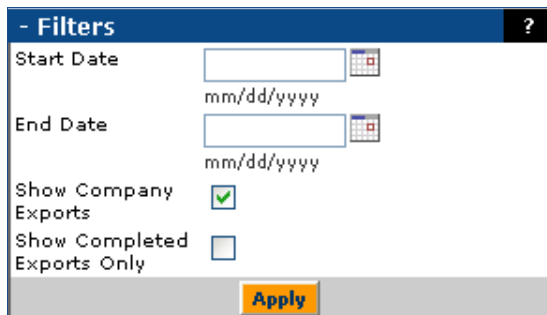
?

Exports ?

Results per page Results found: 2 Page of 1

File Name	Requestor	Description	Request Date / Time	Expiration Date	Export File Size	Export Status	Select
HRDepartmentPOs2006	Hartman, Ashlee	POs from HR Department in 2006	7/15/2006 11:43 AM	7/22/2006	5.0 KBytes	Completed	<input type="checkbox"/>
JunePOData	Hartman, Ashlee	June 2006's Purchasing Data	7/15/2006 11:42 AM	7/22/2006	3.0 KBytes	Completed	<input type="checkbox"/>

8. An export status of **Completed** indicates that the file is ready to be accessed. A pending status indicates the export is not completed and cannot be opened yet. Process errors are also indicated if they ever occur.
9. To view additional exports, click the **+Click to filter exports**. Enter the criteria desired (such as company exports to view all exports), then click **Apply** to view the exports.



- Filters ?

Start Date

End Date

Show Company Exports ☒

Show Completed Exports Only ☐

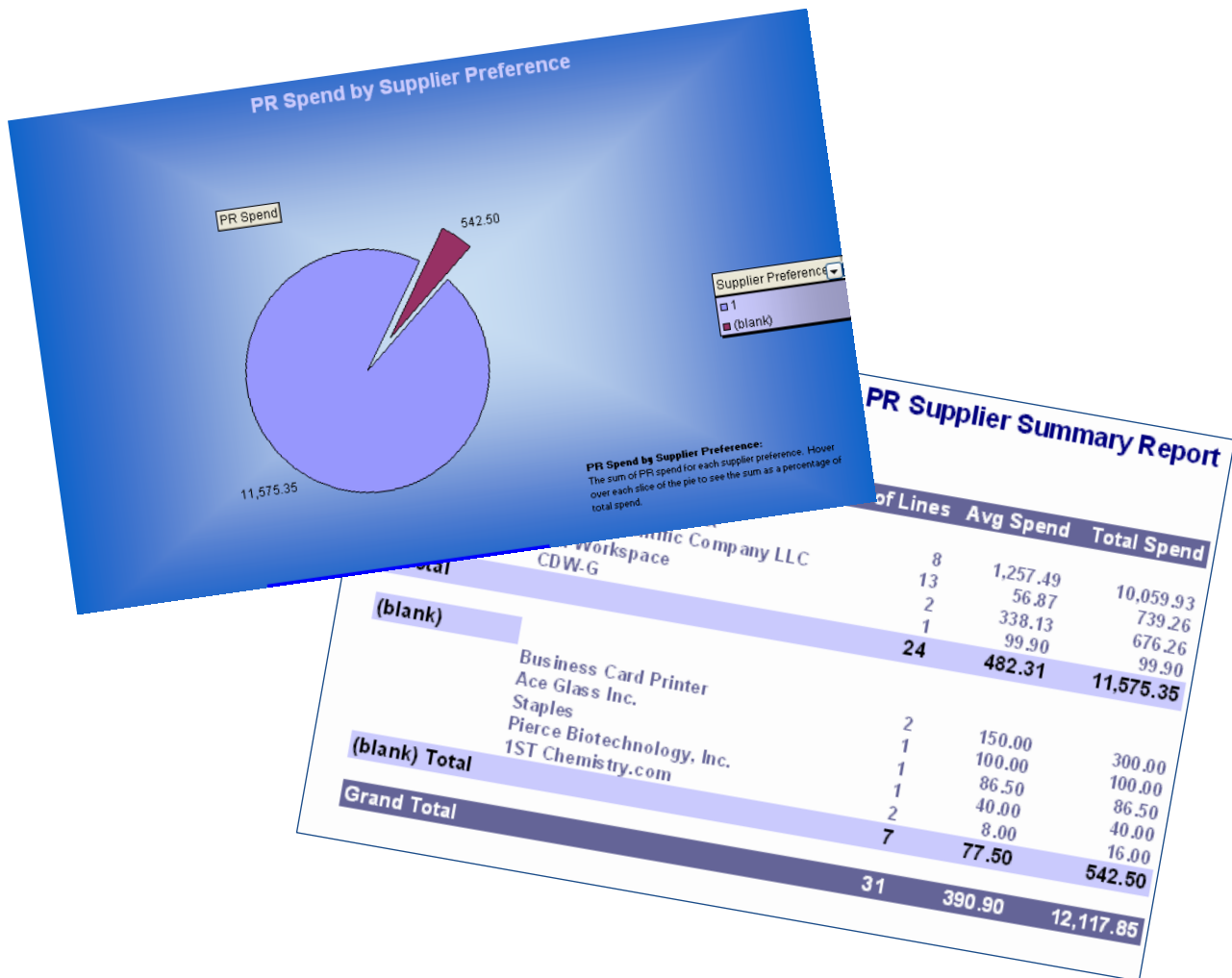
10. To access your data (for reporting, review, analysis, etc), click on the file name in the left-hand column.
11. You will be asked if you would like to Open or Save the data. We recommend that you save the file or files to your hard drive. The files are in.csv format and can be opened using MS Excel, Access, or any reporting software.

USING THE PO AND PR TEMPLATES

SciQuest provides templates that can be used to view purchasing and requisition data. These templates can be used with the monthly extract files AND with Full Exports of PO and PR data (generated from search results). The templates provide a more “user-friendly” way to analyze and understand your organization’s data, including supplier information, financial information, and breakdown of purchases by category, and more.

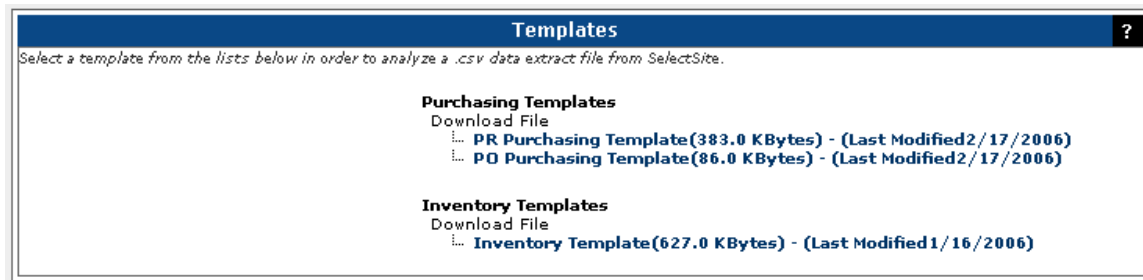
The templates are created in MS Excel, and this is where the information is displayed. There are multiple worksheets in the templates, representing different reports. Below are a few examples of the templates with populated data.

Step by Step

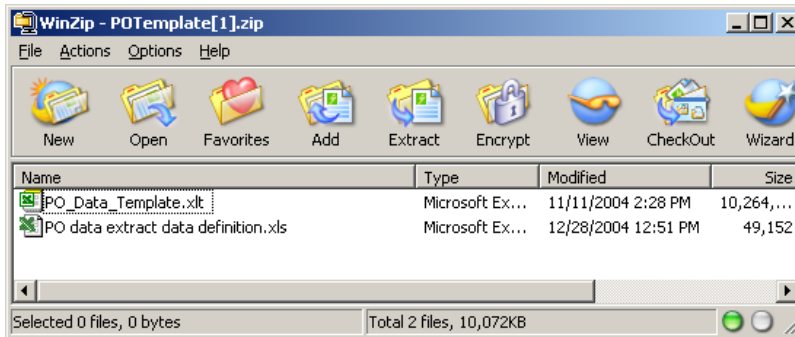


The goal of this exercise is to access report templates for PO and PR data. Detailed instructions of how to populate the spreadsheet (reports) are found in the actual templates themselves.

1. Access the PR or PO data templates. You can access the files from either of the following locations in SelectSite:
 - **History** navigation tab → **search exports** sub-tab. At the bottom of the screen.
 - **Reports** navigation tab → **data/archive** sub-tab. At the bottom of the screen.



2. There are two separate templates for Purchase Order data and Purchase Requisition (cart) data. Select the appropriate template.
3. A pop-up opens, which prompts to **Save** or **Open** the file. SciQuest suggests that you save this file locally. The contents of the.zip file should look similar to those below:



4. Note: the data extract definition file contains a detailed explanation of the template and POdata extract fields.
5. Extract or open the PO_Data_Template.xls file or the PR_Data_Template.xls file.
6. **Enable** Macros when asked. The template opens in MS Excel.
7. Save the file locally as an Excel template (.xlt) for future use.

TIP:

The Excel template incorporates macros. If your organization or computer does not support using external macros, the file also includes instructions for refreshing data manually. To review or modify this setting in Excel, look under the Tools menu →Macro→Security.

8. To populate the template with your data:
9. Open the template and print the instructions found on the first worksheet. It contains instructions on how to populate the template with the data from the PODate or PRData file, as well as how to update the pivot tables with that data. Follow these instructions to view the monthly data in the Purchasing Templates pivot tables.

The last worksheet in the template file details how to join the extract files using a third-party reporting application in order to generate customized report