THE TEXAS STATE UNIVERSITY SYSTEM

TSUS Marketplace

USER GUIDE

TEXAS STATE UNIVERSITY
SAN MARCOS
The rising STAR of Texas

REV 01/2020

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

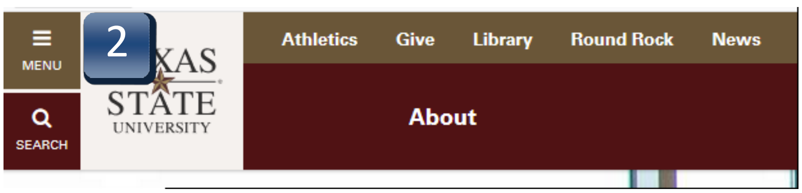
Table of Contents

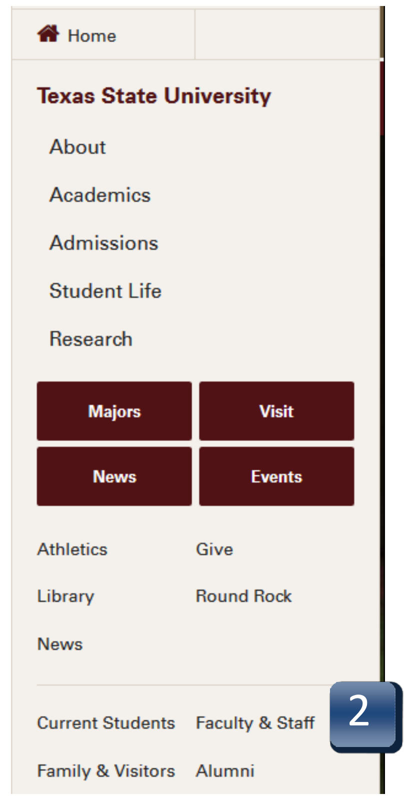
Accessing the System

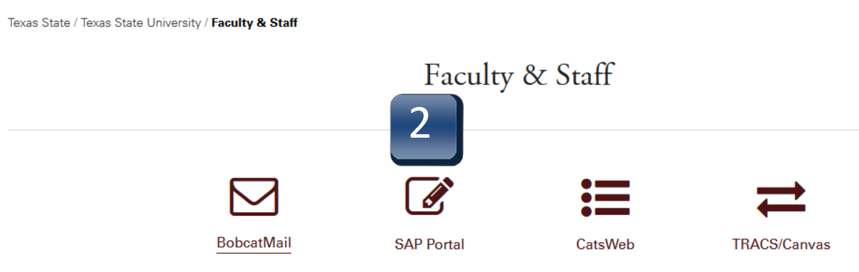
STEP 1: Go to the Texas State University home page: www.txstate.edu

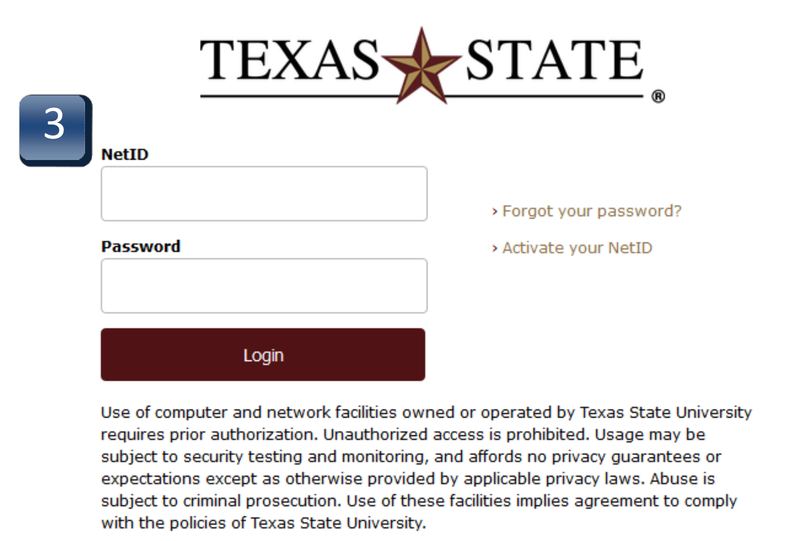
STEP 2: On the home page, click on the **Menu** icon, click on **Faculty & Staff** and select **SAP Portal**.

STEP 3: Log in with NetID and password.



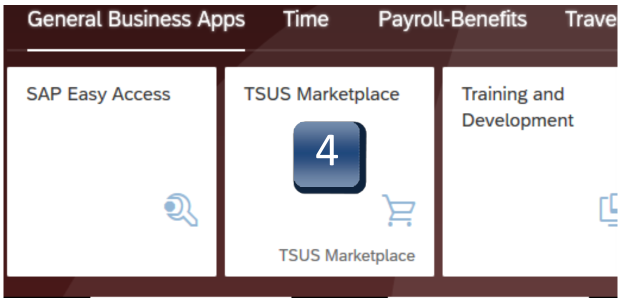






Accessing the System

STEP 4: Click on the **TSUS Marketplace** option. If the menu does not appear, click on the person icon in the upper left-hand corner.



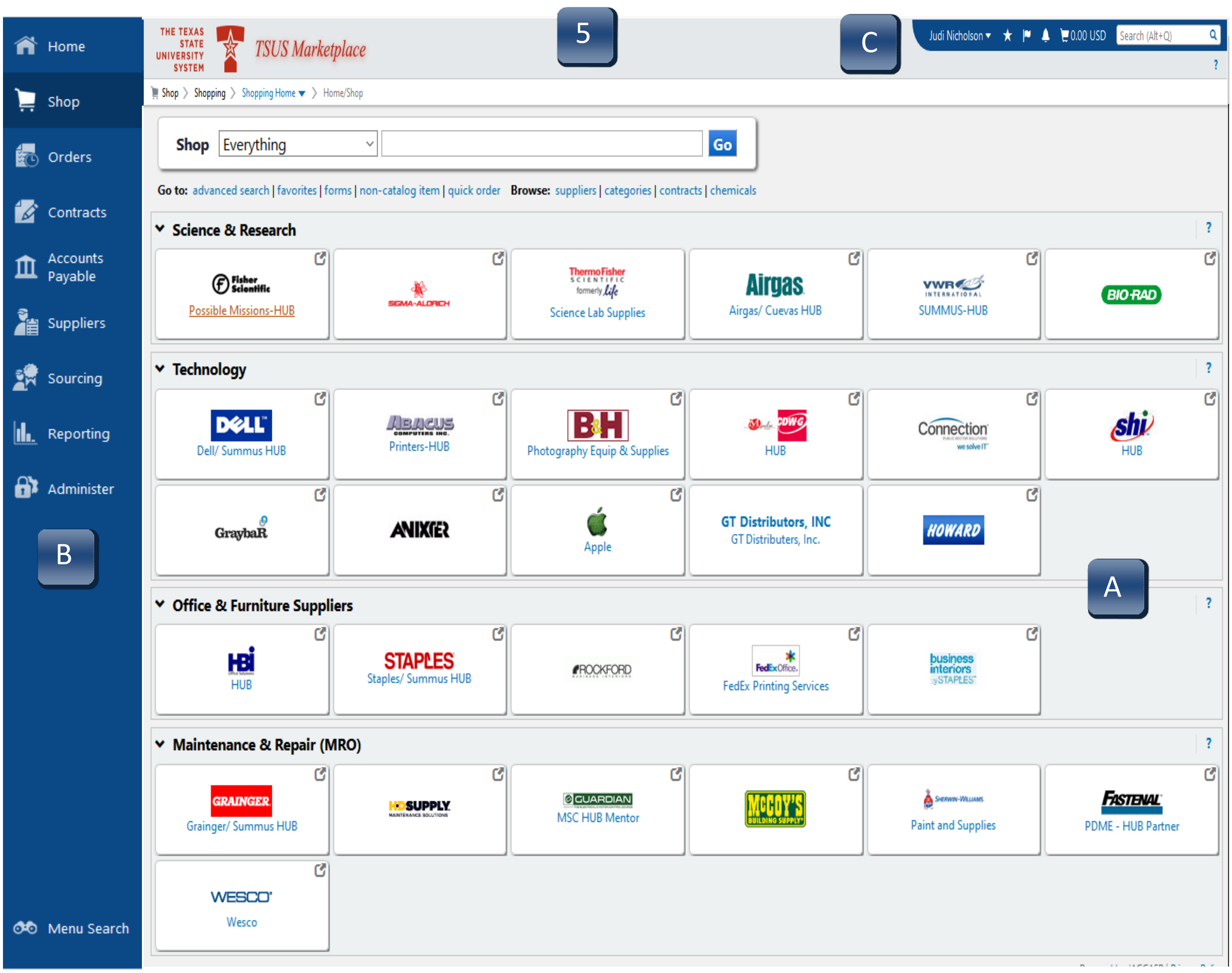
Accessing the System - Home Page Navigation

STEP 5: A separate browser window will open with the TSUS Marketplace home page.

A: **Main Workspace** - changes as you access areas of the site, displays breadcrumbs at top, under TSUS Marketplace logo.

B: **Side Navigation Menu** - remains in place, when you roll over icons, slide-out submenus display, menus grouped by related tasks.

C: **Top Banner** - user profile customization, action items, notifications, quick viewof active shopping cart, quick search of site.



System Functions - User Roles

Shopper

- Adds items to carts
- Assigns carts to Requisitioner

Requisitioner

- Adds items to carts
- Updates or changes carts
- Reviews assigned carts
- Places order
- Withdraws requisitions

Approver

- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Security form to ITAC. To view your assigned role, follow instructions on the next page.

System Functions – How to Identify User Roles

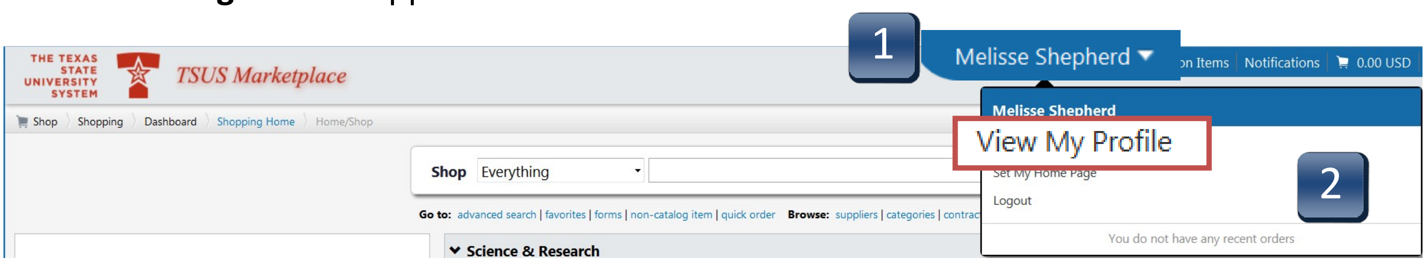
STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page

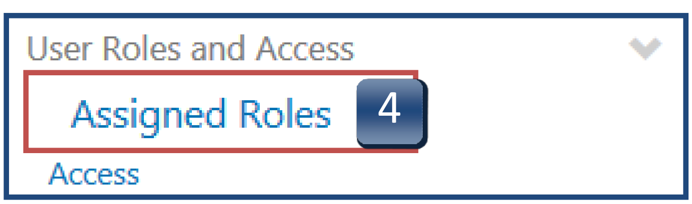
STEP 2: **Select View My Profile. My Profile** page appears.

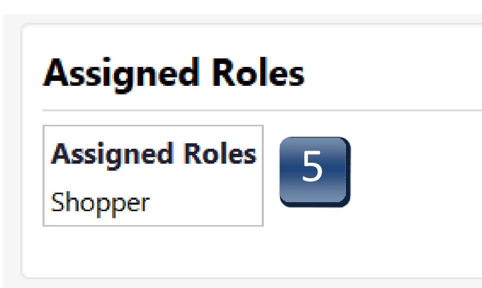
STEP 3: Select **User Rolls and Access**.

STEP 4: Select **Assigned Rolls.**

STEP 5: **Assigned Roll** appears.







System Functions – Profile Setup – Default Shipping Address

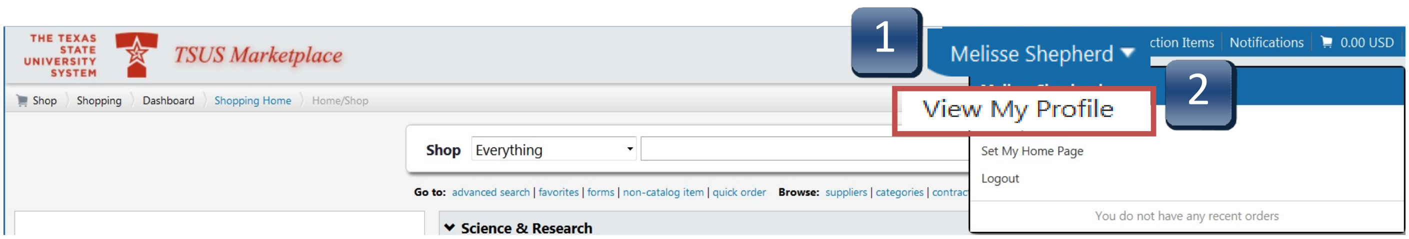
STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page.

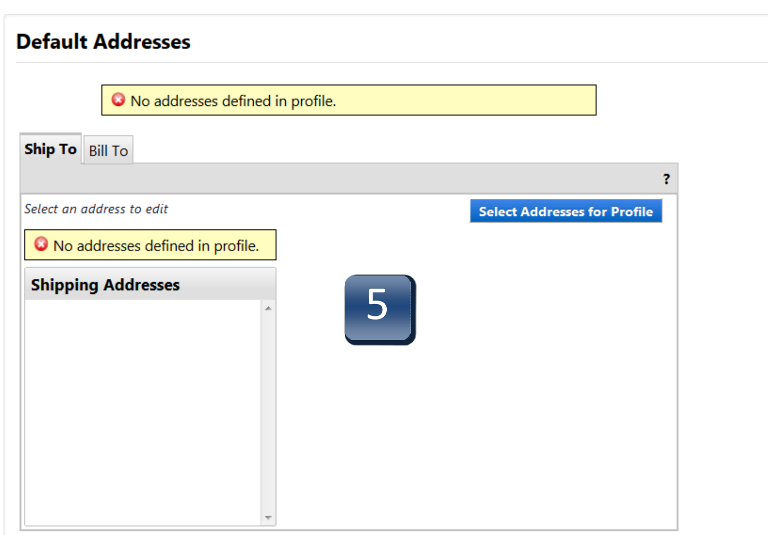
STEP 2: **View My Profile. My Profile** page appears.

STEP 3: Select **Default User Settings.**

STEP 4: Select **Default Addresses.**

STEP 5: **Default Address** box appears.

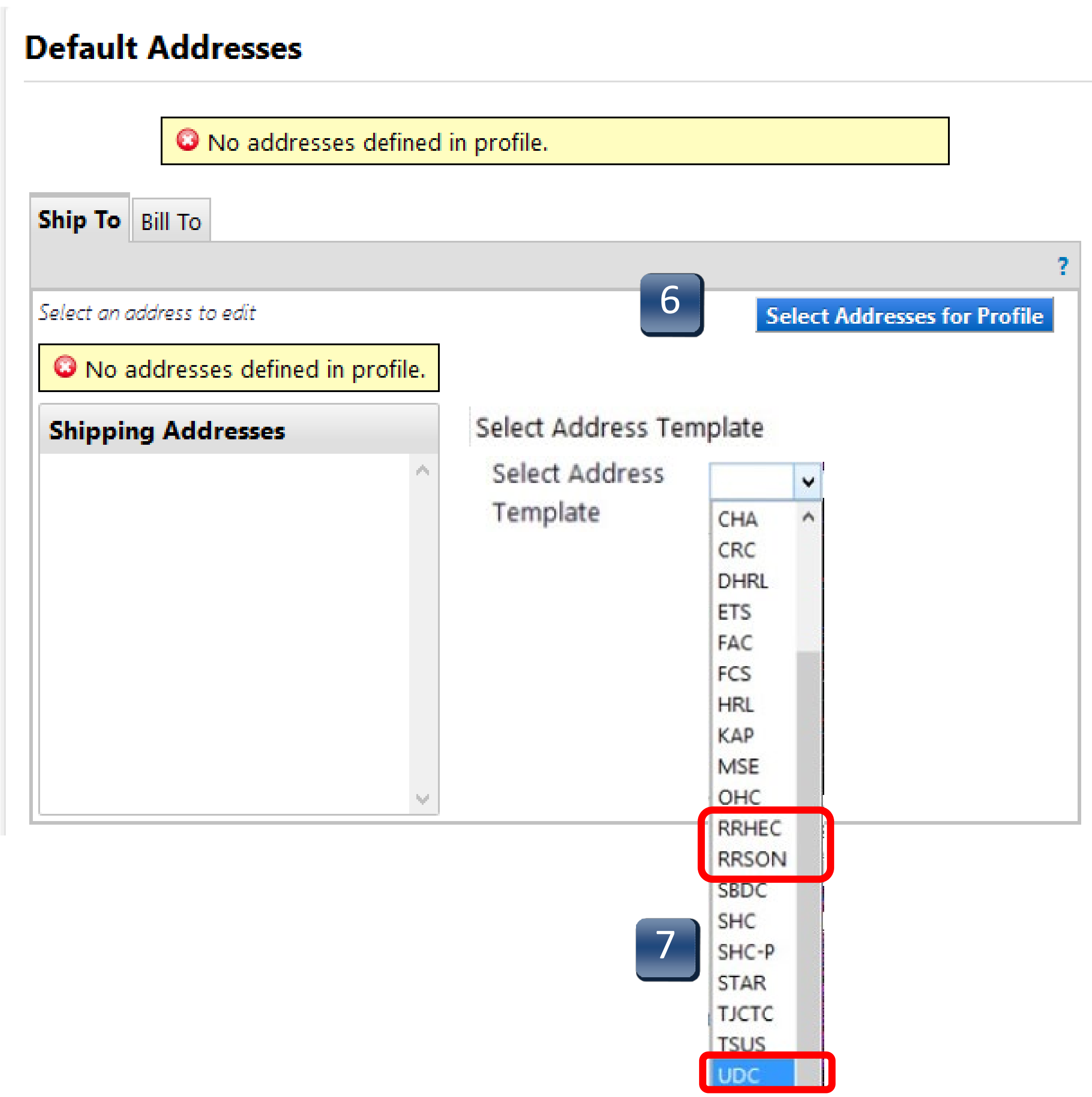




System Functions - Profile Setup – Default Shipping Address

STEP 6: Under the **Ship To** tab, click **Select Addresses for Profile** button. The **Select Address Template** window will appear.

STEP 7: From **Select Address Template** drop down menu, choose your shipping location. (San Marcos users will select **UDC**—University Distribution Center. Round Rock users will use **RRHEC**—Round Rock Higher Education Center or **RRSON**—Round Rock School of Nursing).



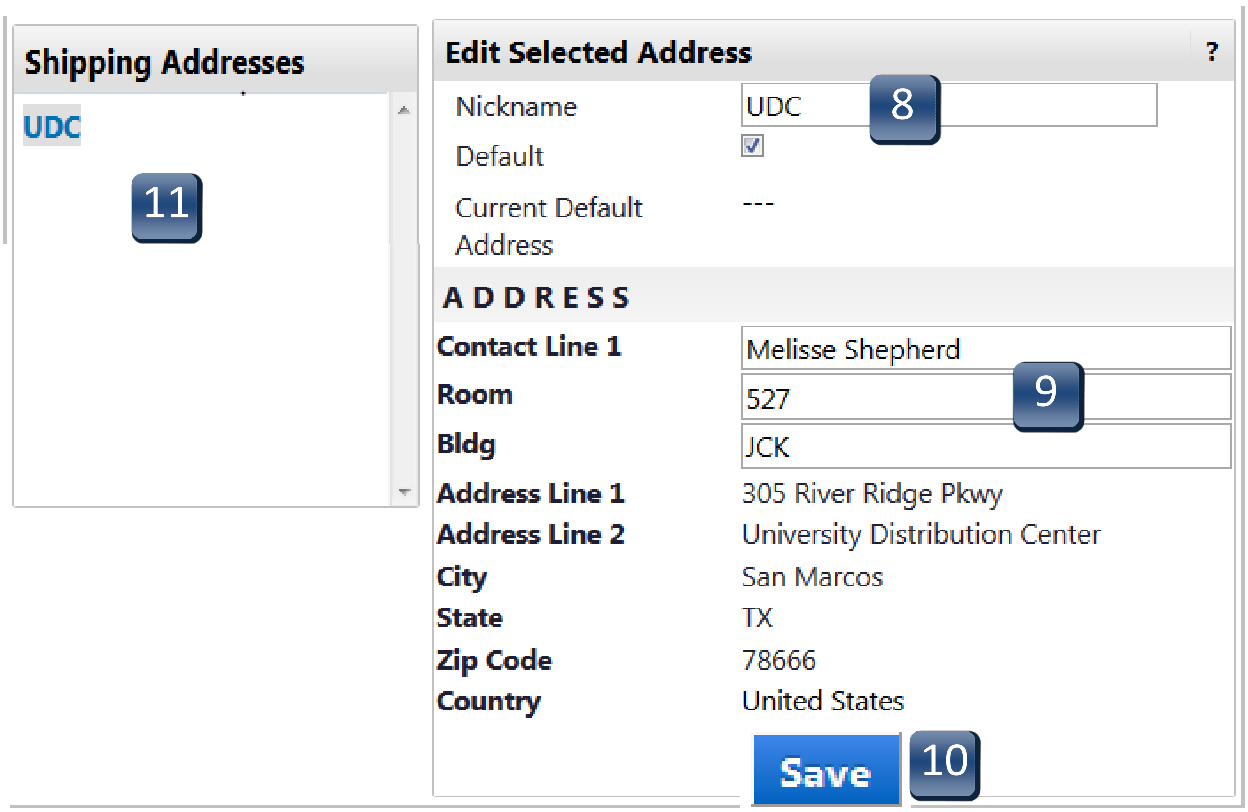
System Functions - Profile Setup – Default Shipping Address

STEP 8: Once selected, location will populate the **Nickname** field.

STEP 9: Enter your **Room** and **Building.**

STEP 10: **Click Save.**

STEP 11: Newly saved address will populate **Shipping Addresses** menu.



System Functions - Profile Setup – Default Billing Address

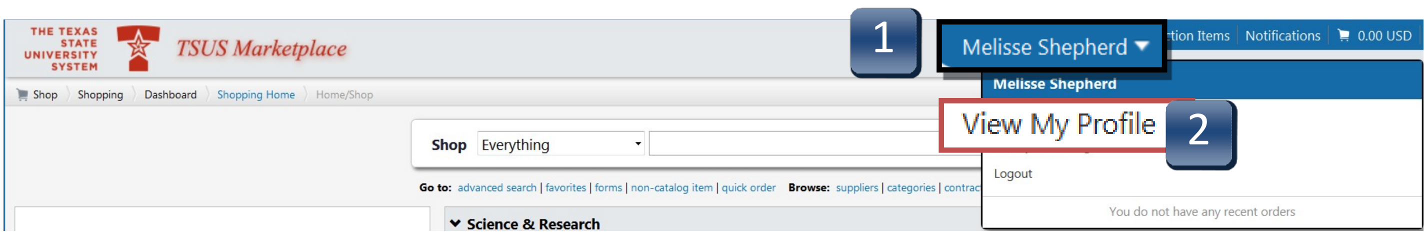
STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page.

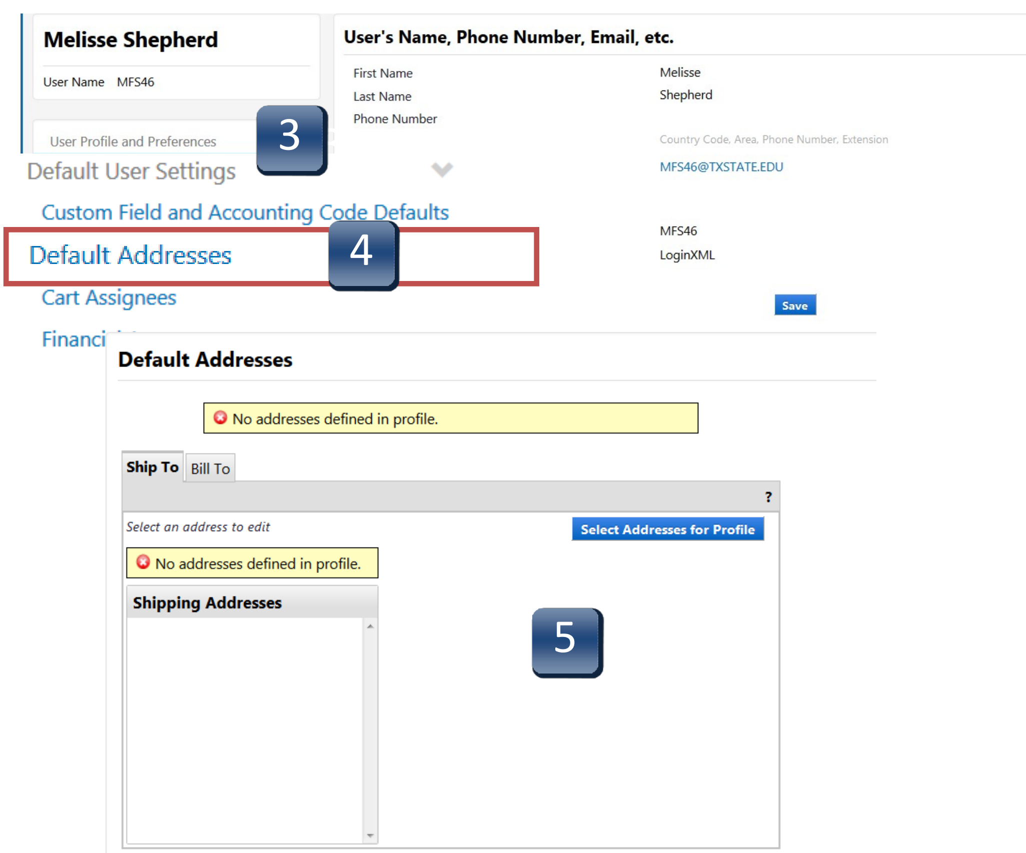
STEP 2: **Select View My Profile. My Profile** page appears.

STEP 3: Select **Default User Settings.**

STEP 4: Select **Default Addresses.**

STEP 5: **Default Address** box appears.





System Functions - Profile Setup – Default Billing Address

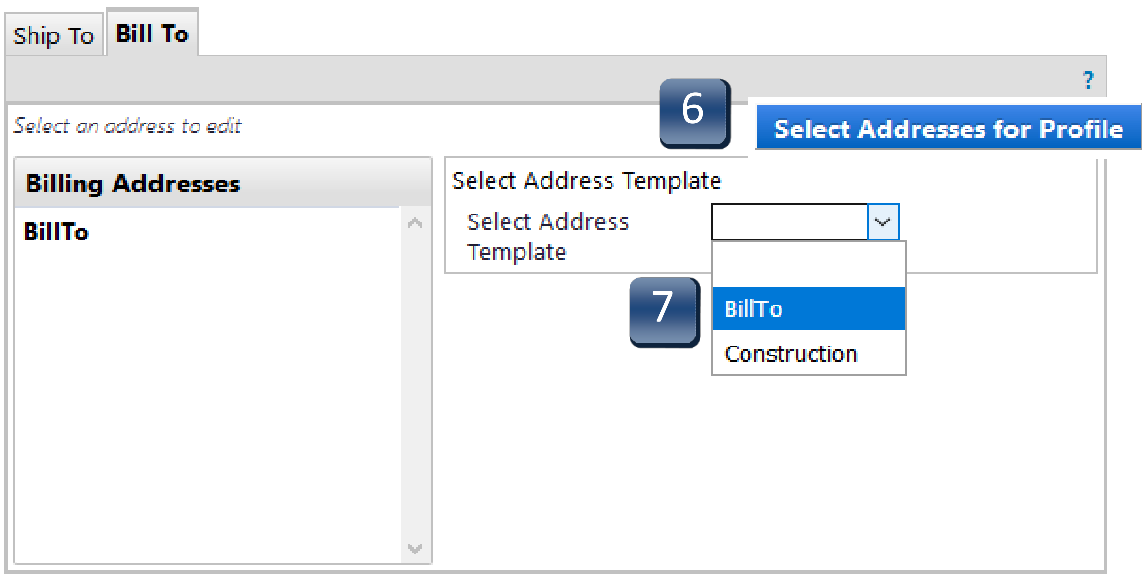
STEP 6: Under the **Bill To** tab, click Select Addresses for Profile button. The **Select Address Template** window will appear.

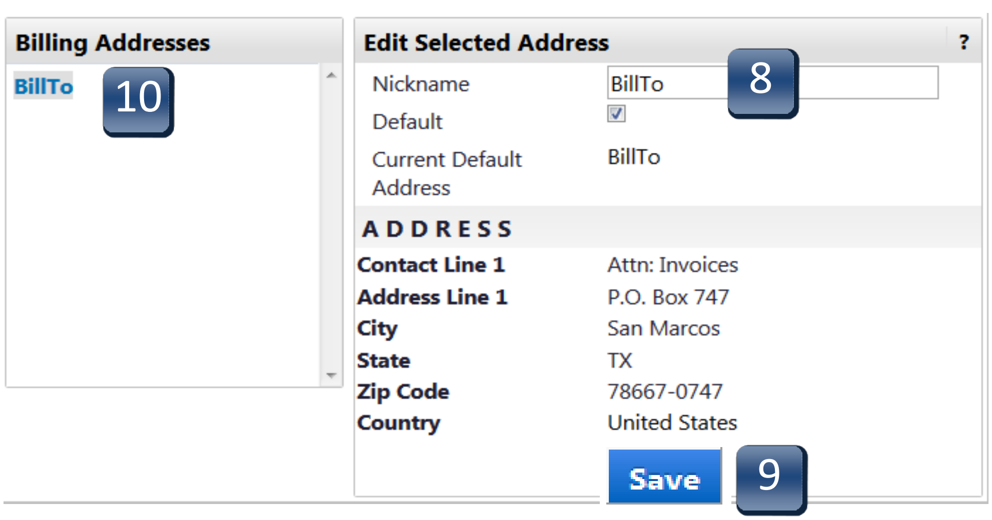
STEP 7: From **Select Address Template** drop down menu, choose **BillTo**.
Construction is for Facilities only.

STEP 8: Once selected, **BillTo** will populate in **Nickname** field.

STEP 9: Click **Save**

STEP 10 Newly saved address will populate in Shipping Addresses menu.





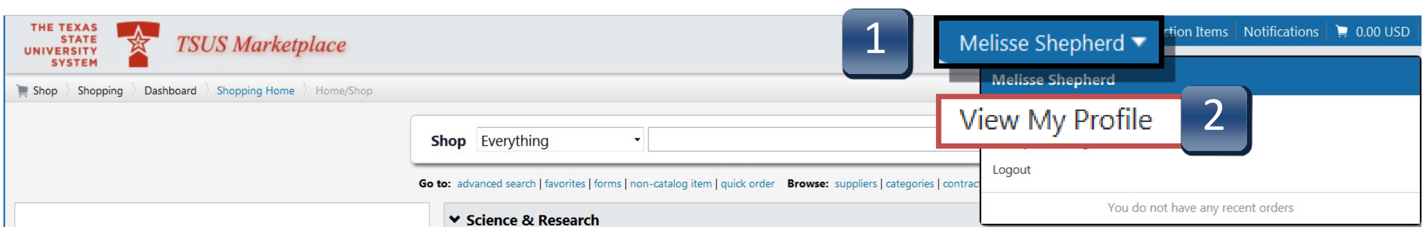
System Functions - Profile Setup – Notification Preferences

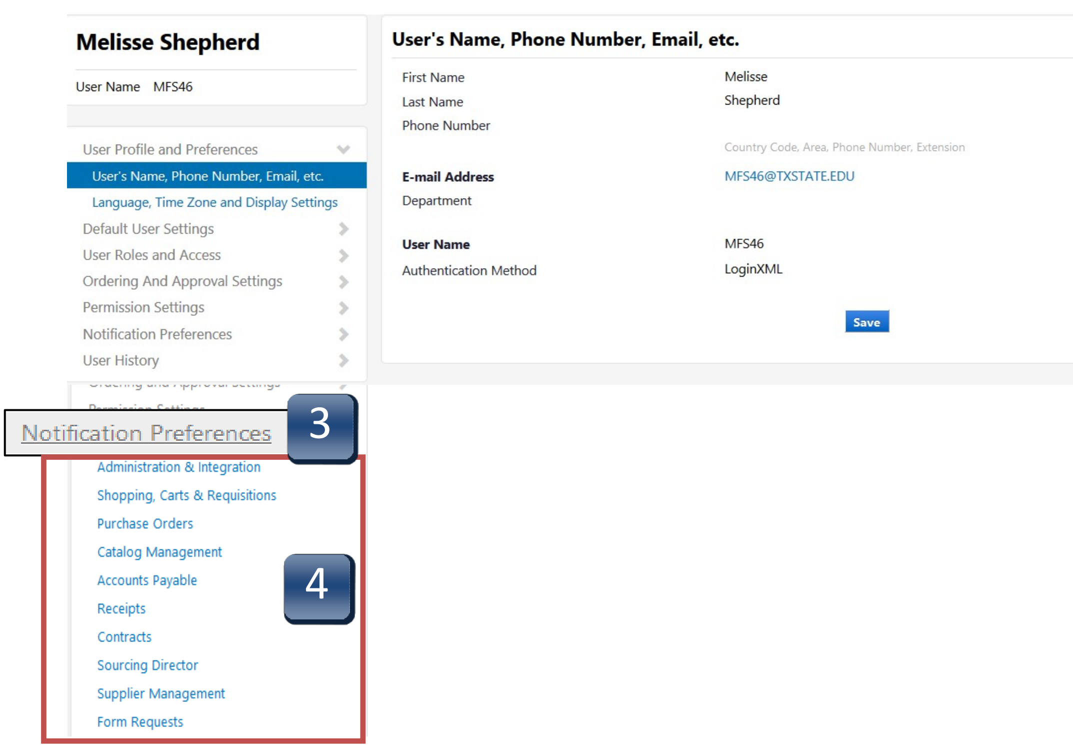
STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page.

STEP 2: **Select View My Profile. My Profile** page appears.

STEP 3: Select **Notification Preferences**

STEP 4: **Notification Preferences** section is categorized by notification type, e.g. Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, etc.





System Functions - Profile Setup – Notification Preferences

STEP 5: Once you have selected which category you want to edit, click on **Edit Section.**

STEP 6: Select **Override** from each function and use the drop-down to select email & notification. By selecting Email & Notification, you will receive alerts within TSUS Marketplace as well as an email when this workflow step has been completed.

We recommend the following:

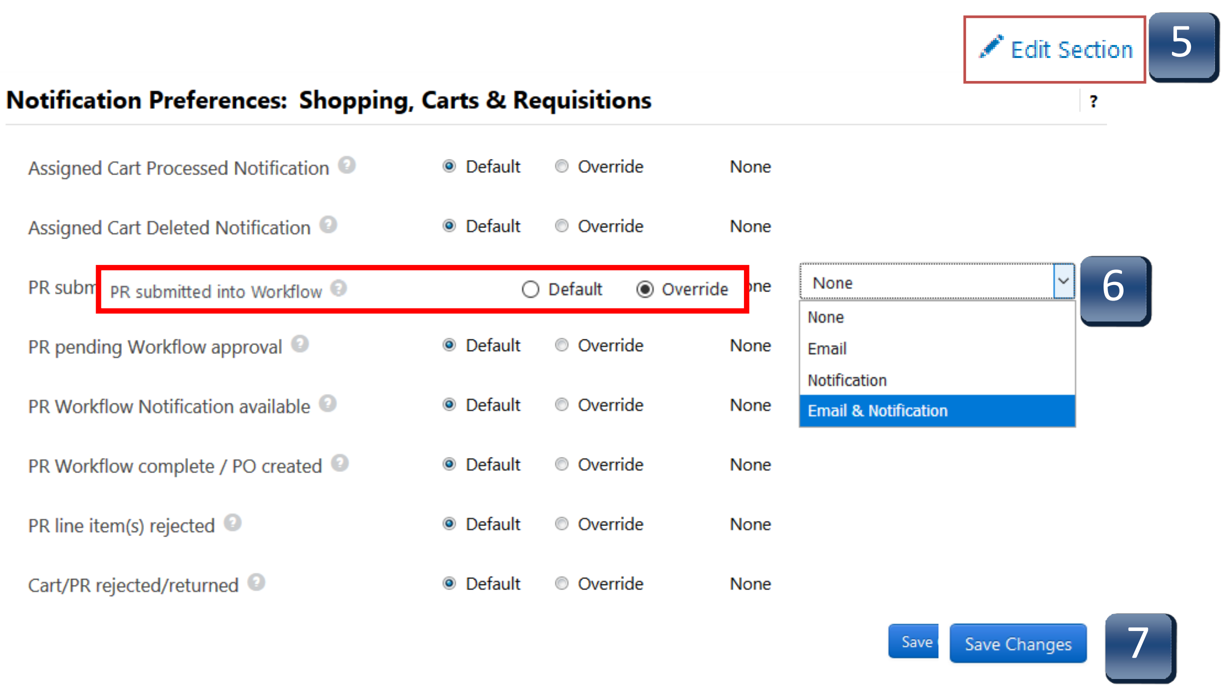
Shopping, Carts & Requisitions

1. Assigned Cart Processed
2. PR Workflow complete/ PO Created
3. Cart/ PR rejected/ Returned
4. PR submitted into Workflow
5. For Approvers: PO Pending Workflow approval

Purchase Orders

1. PO rejected

STEP 7 Scroll down to bottom of list and click **Save**.



System Functions - Profile Setup - Default Funding

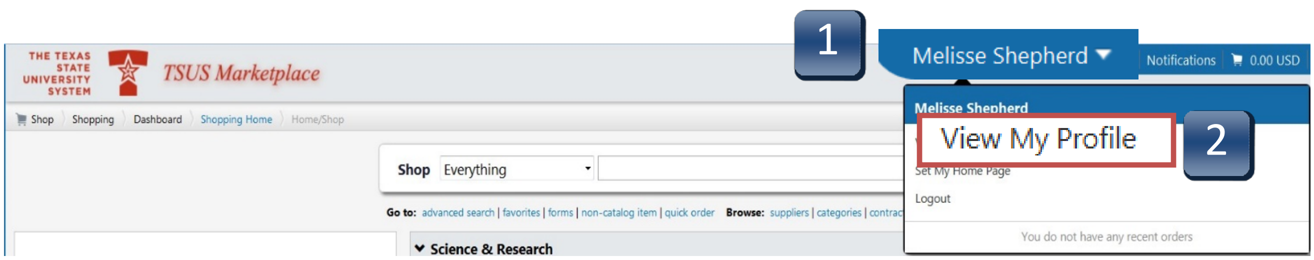
STEP 1: Select **your name** in the top right corner of the TSUS Marketplace home page.

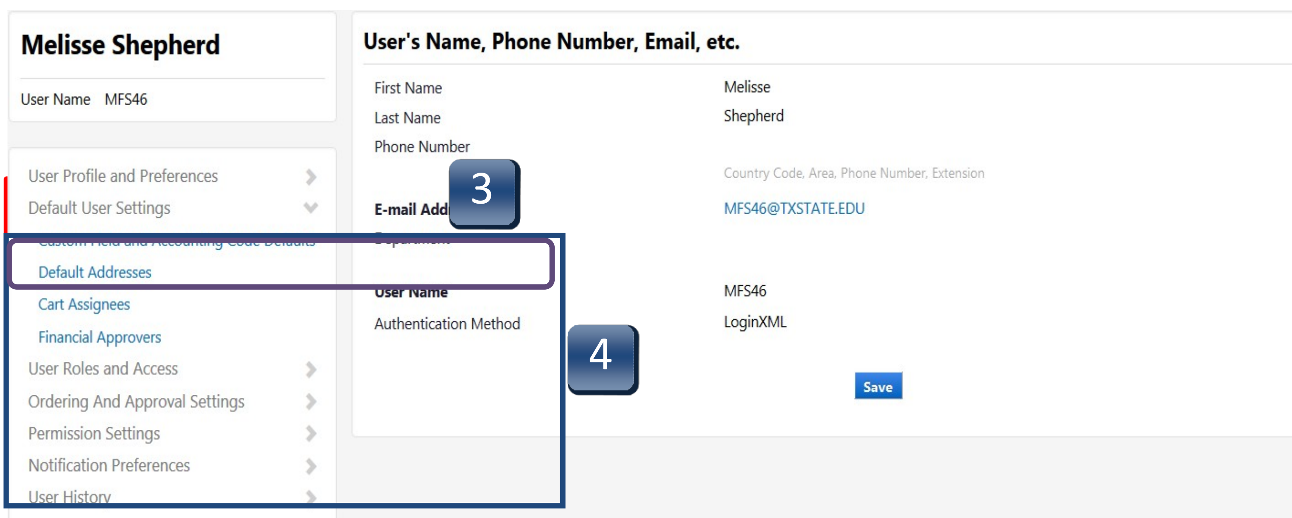
STEP 2: **Select View My Profile. My Profile** page appears.

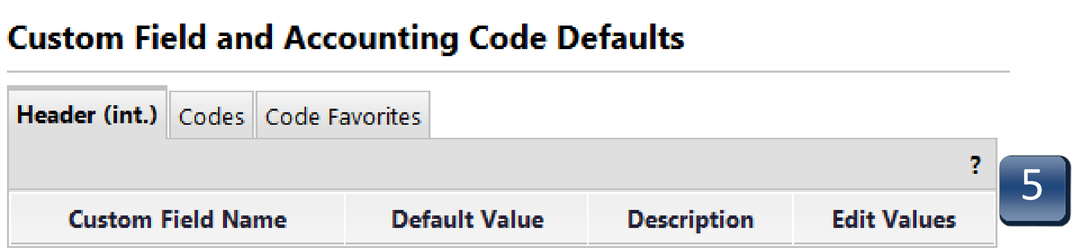
STEP 3: Select **Default User Settings**.

STEP 4: Select **Custom Field and Accounting Code Defaults.**

STEP 5: **Custom Field and Accounting Code Defaults** code tabs appear.



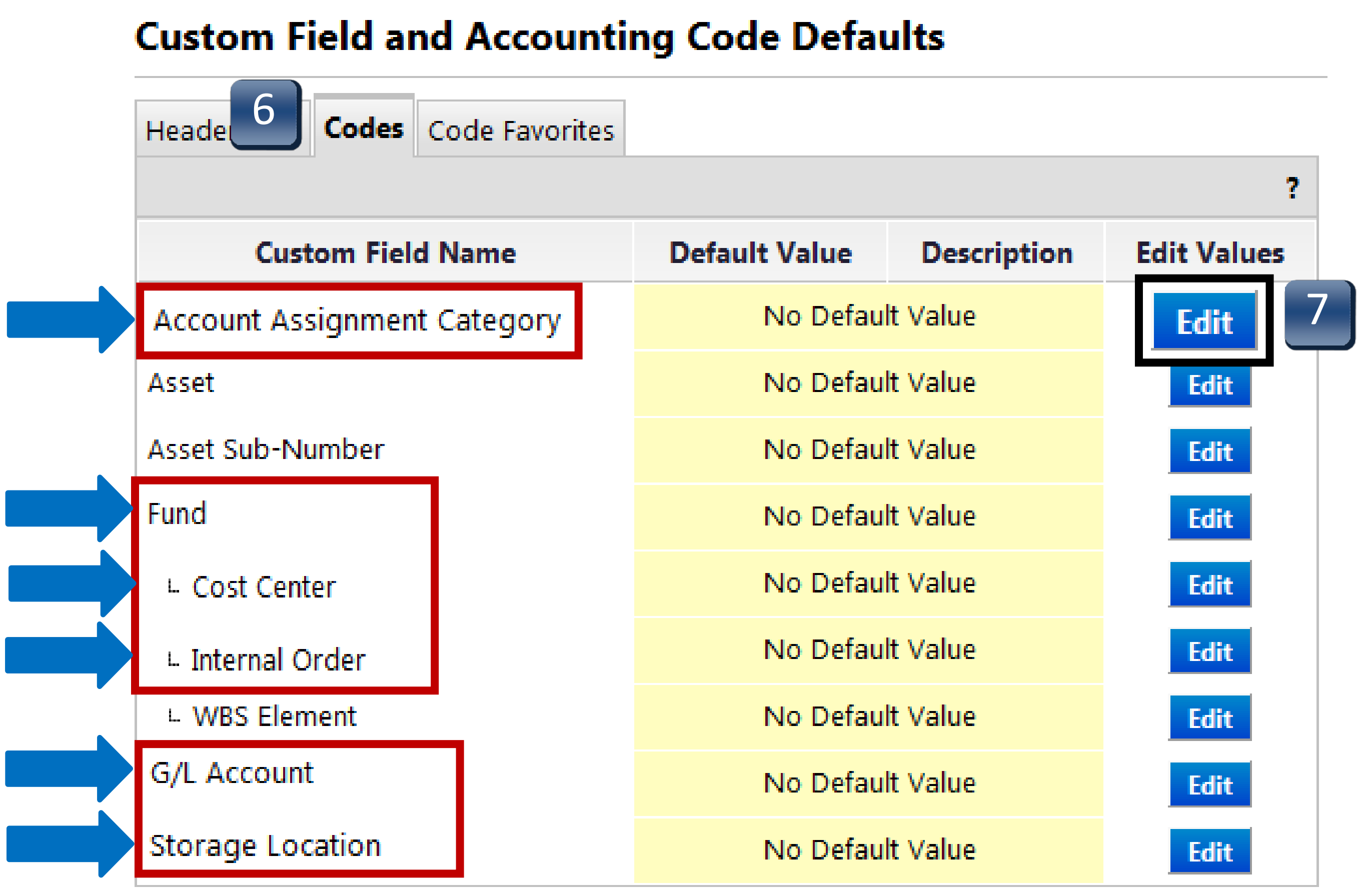




System Functions - Profile Setup - Default Funding

STEP 6: Select **Codes** tab.

STEP 7: To set a default or favorite value, select the **Edit** button in the **Edit Values** column for the **Custom Field Name** you want to change. The next pages will show you how to set up the below outlined fields.


Custom Field and Accounting Code Defaults

Header | **Codes** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit
Asset	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Fund	No Default Value		Edit
∟ Cost Center	No Default Value		Edit
∟ Internal Order	No Default Value		Edit
∟ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Storage Location	No Default Value		Edit

Once default settings have been saved, the Codes tab should reflect them.

System Functions - Profile Setup – Default Funding

ACCOUNT ASSIGNMENT CATEGORY

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Account Assignment** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

?

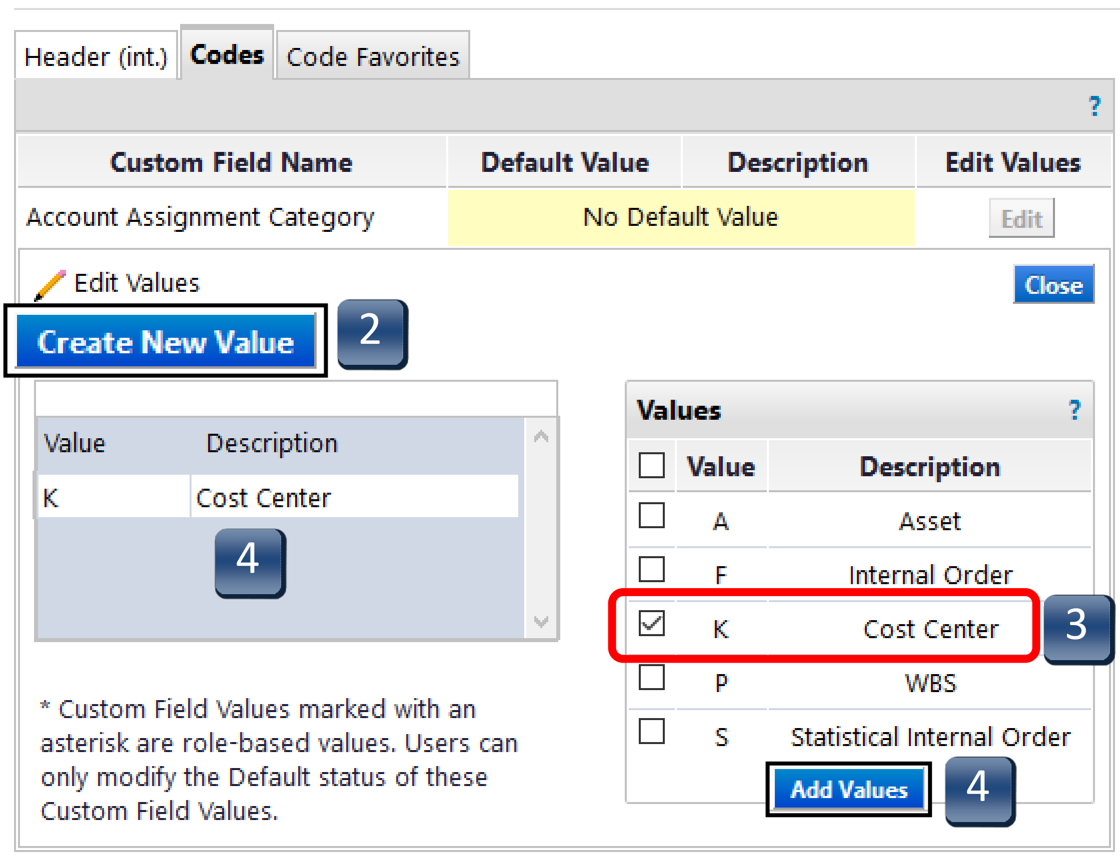
Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
∟ Cost Center	No Default Value		Edit
∟ Internal Order	No Default Value		Edit
∟ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

STEP 2: Click on the **Create New Value** button.

STEP 3: Make selections according to your funding type.
(A, F, K, or S--*Do not* use P/WBS**)**
Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as the default.

STEP 4: Click **Add Values**. Value is added to the table.

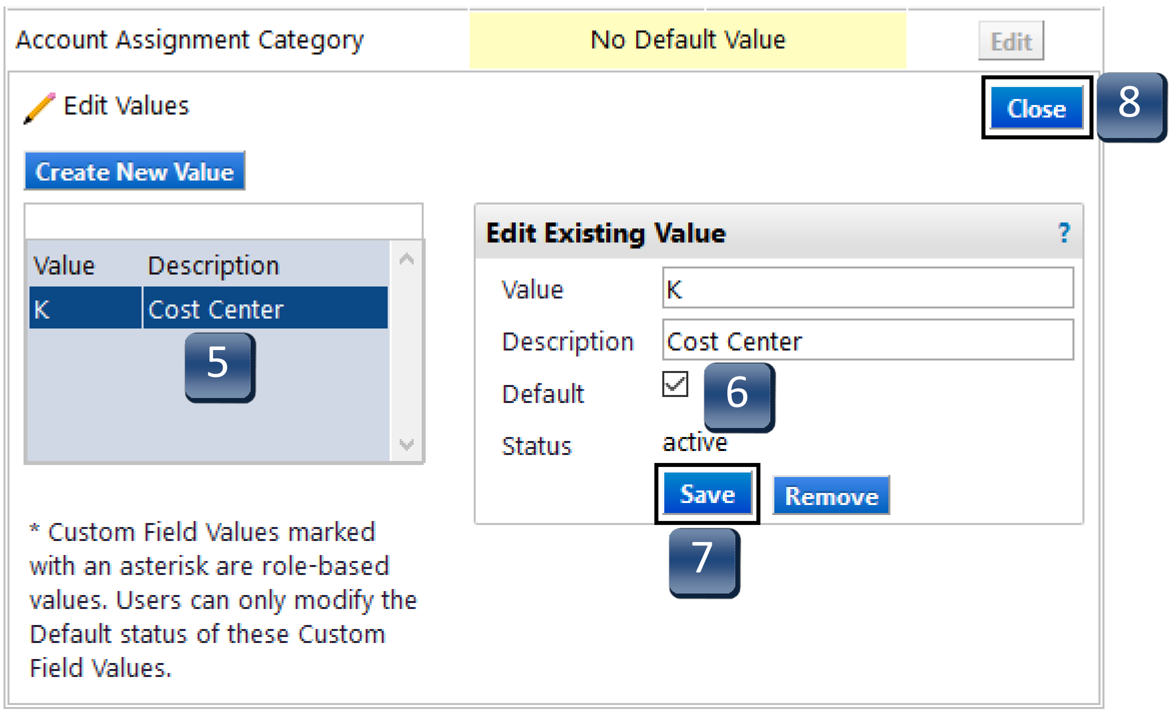


STEP 5: Click on the Description of the value you added to the table. **Edit Existing Value** menu appears.

STEP 6: Check the **Default** box to set this value as the default for this field.

STEP 7: Click **Save**. New default value has been saved.

STEP 8: Click **Close** to return to Codes tab screen.



System Functions - Profile Setup – Default Funding

FUND

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Fund** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

?

Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
∟ Cost Center		No Default Value	Edit
∟ Internal Order		No Default Value	Edit
∟ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

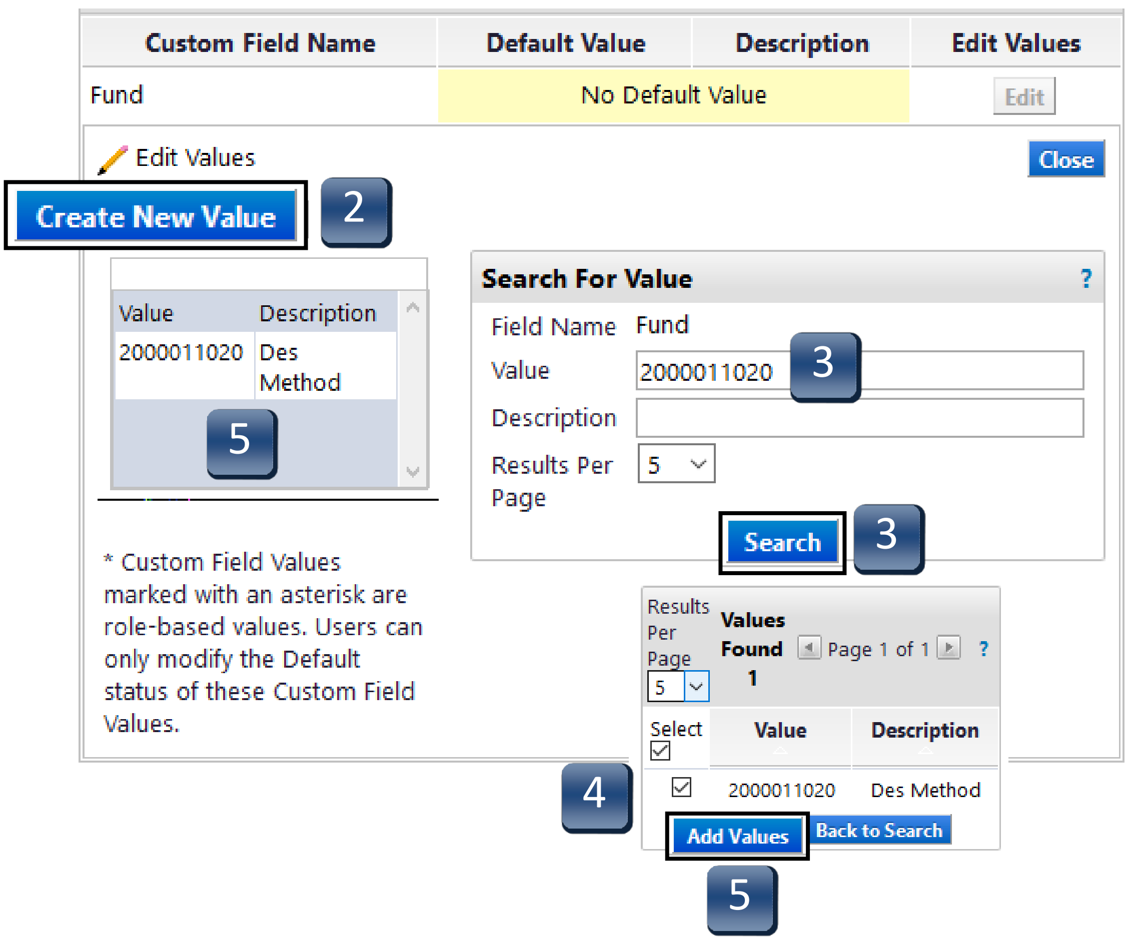
System Functions - Profile Setup – Default Funding

STEP 2: Click on the **Create New Value** button. The **Search For Value** box appears.

STEP 3: If known, enter **Fund** number in the **Value** field and click **Search**. If unknown, click **Search**.

STEP 4: Select your fund. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 5: Click **Add Values**. Value is added to table.



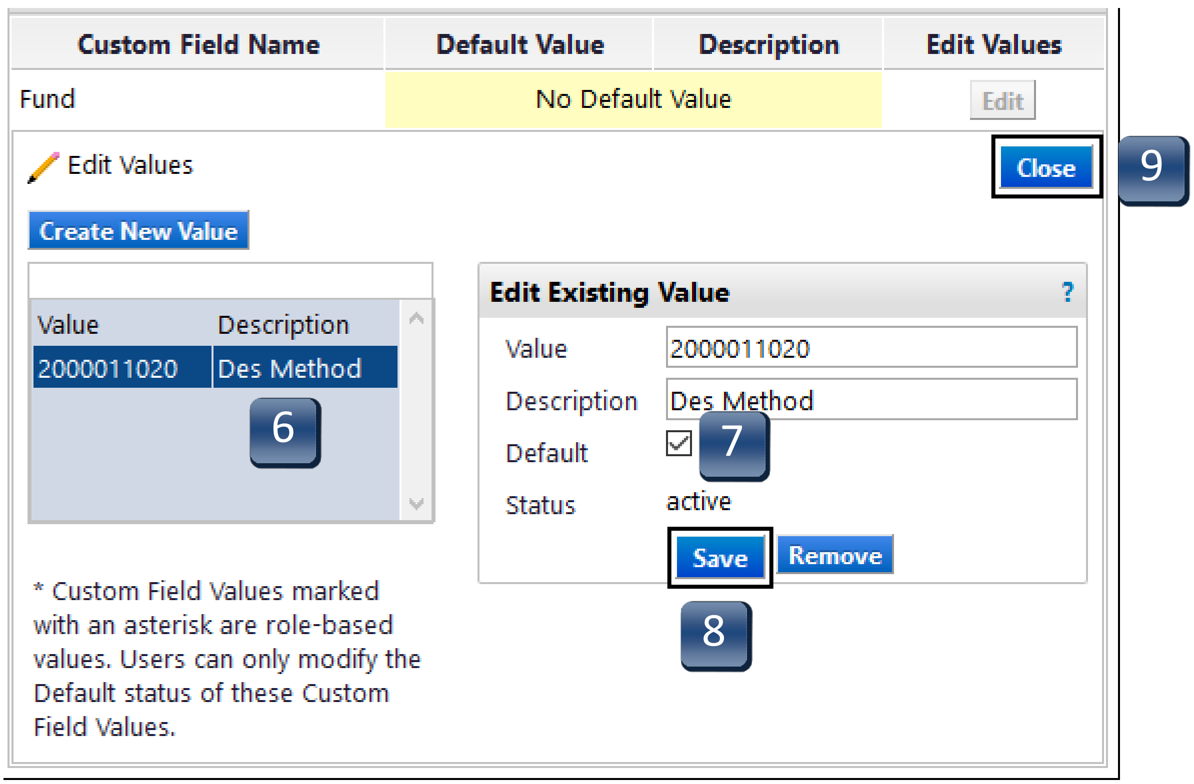
System Functions - Profile Setup – Default Funding

STEP 6: Click the Description of the value you added to the table. **Edit Existing Value** menu appears.

STEP 7: Check the **Default** box to set this number as the default value for this field.

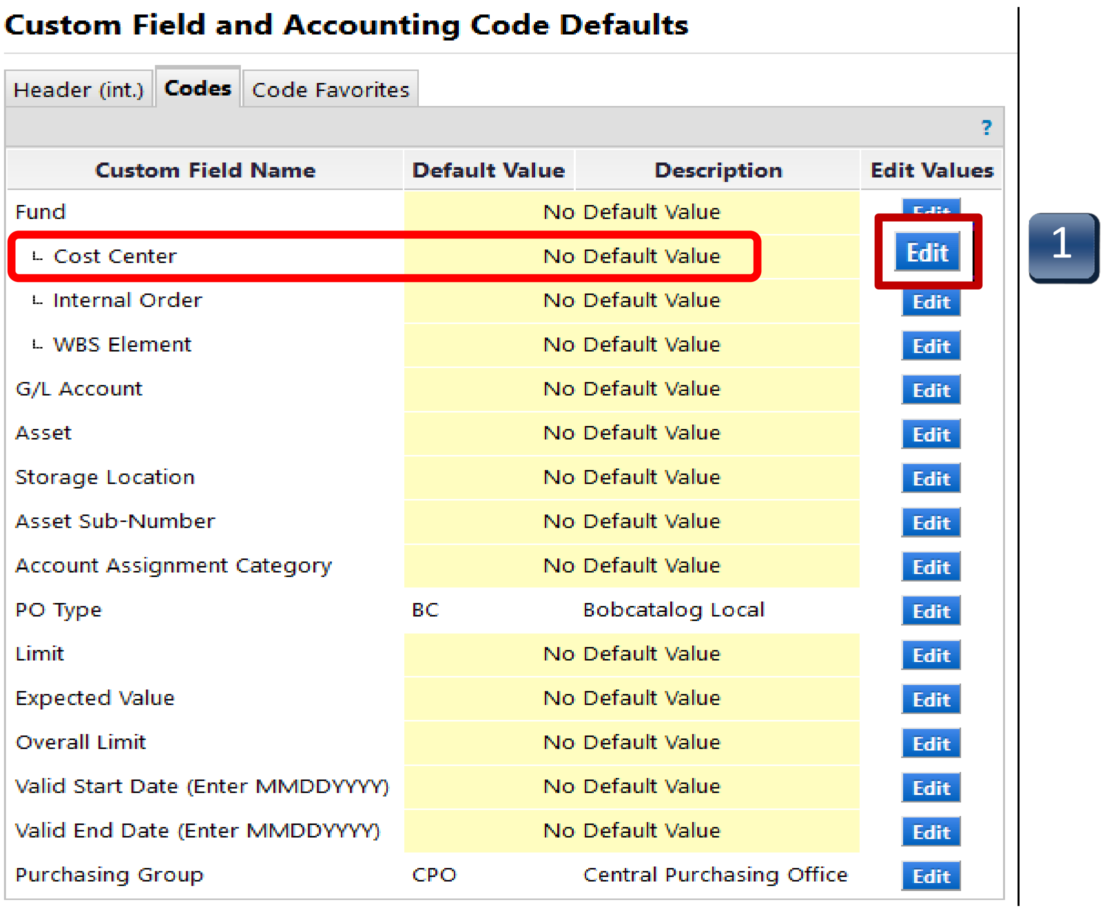
STEP 8: Click **Save**. New default value has been saved.

STEP 9: Click **Close** to return to Codes tab screen.



COST CENTER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Cost Center** value. Values selection menu appears.


Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
∟ Cost Center	No Default Value		Edit
∟ Internal Order	No Default Value		Edit
∟ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

System Functions - Profile Setup – Default Funding

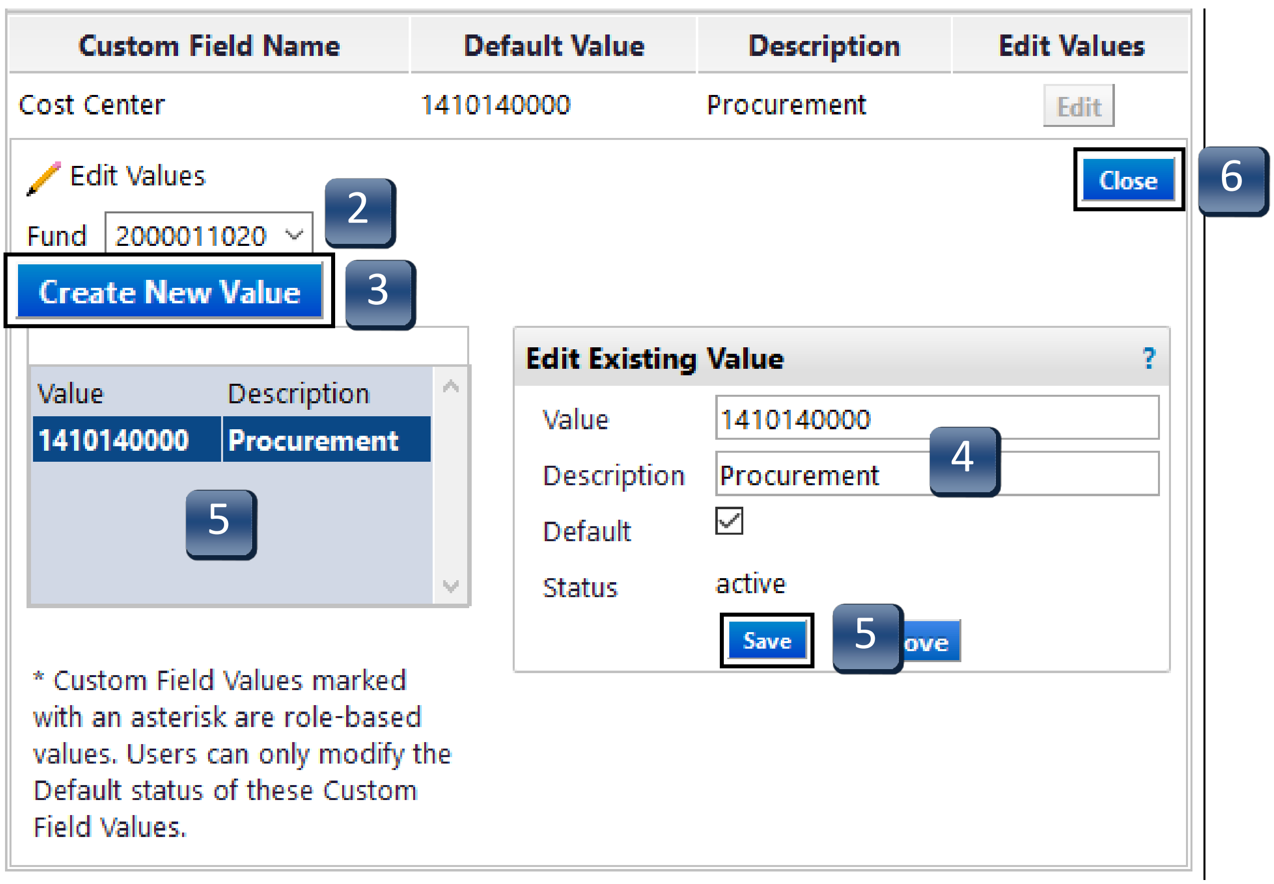
STEP 2: If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 3: Click on the **Create New Value** button. The **New Value** box appears.

STEP 4: Enter Cost Center into the **Value** field in the New Value menu. Check the **Default** box to set this number as the default value for this field. Only one number can be selected as the Default. If you want to type in multiple cost center numbers, proceed to **Step 2** the repeat the above steps for each value.

STEP 5: Click **Save**. Value is added to table.

STEP 6: Click **Close** to return to Codes tab screen.



System Functions - Profile Setup – Default Funding

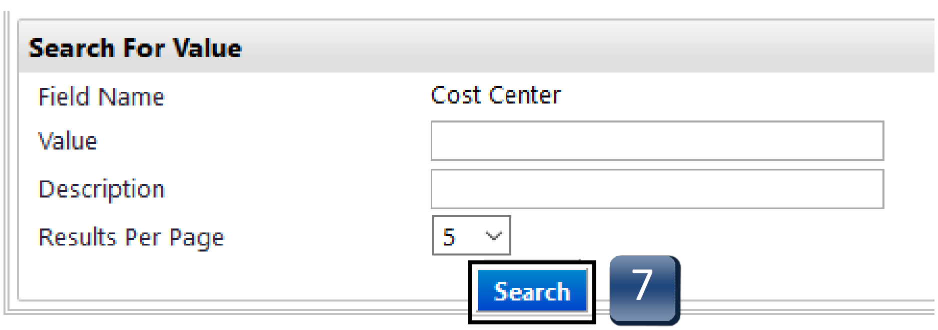
STEP 7: If Cost Center is unknown, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.

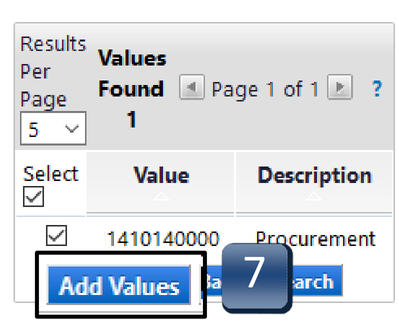
STEP 8: To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.

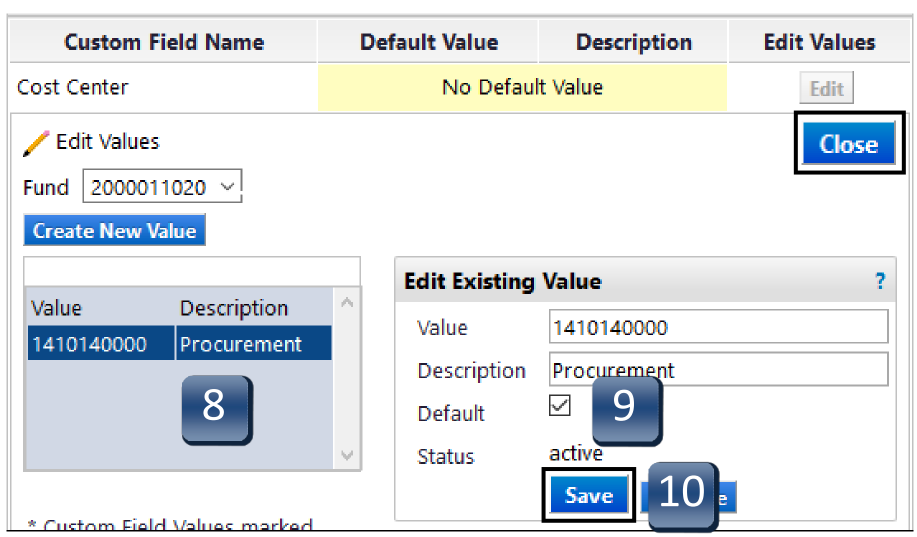
STEP 9: Check the **Default** box to set this number as the default value for this field.

STEP 10: Click **Save**. New default value has been added.

STEP 11: Click **Close** to return to Codes tab screen.



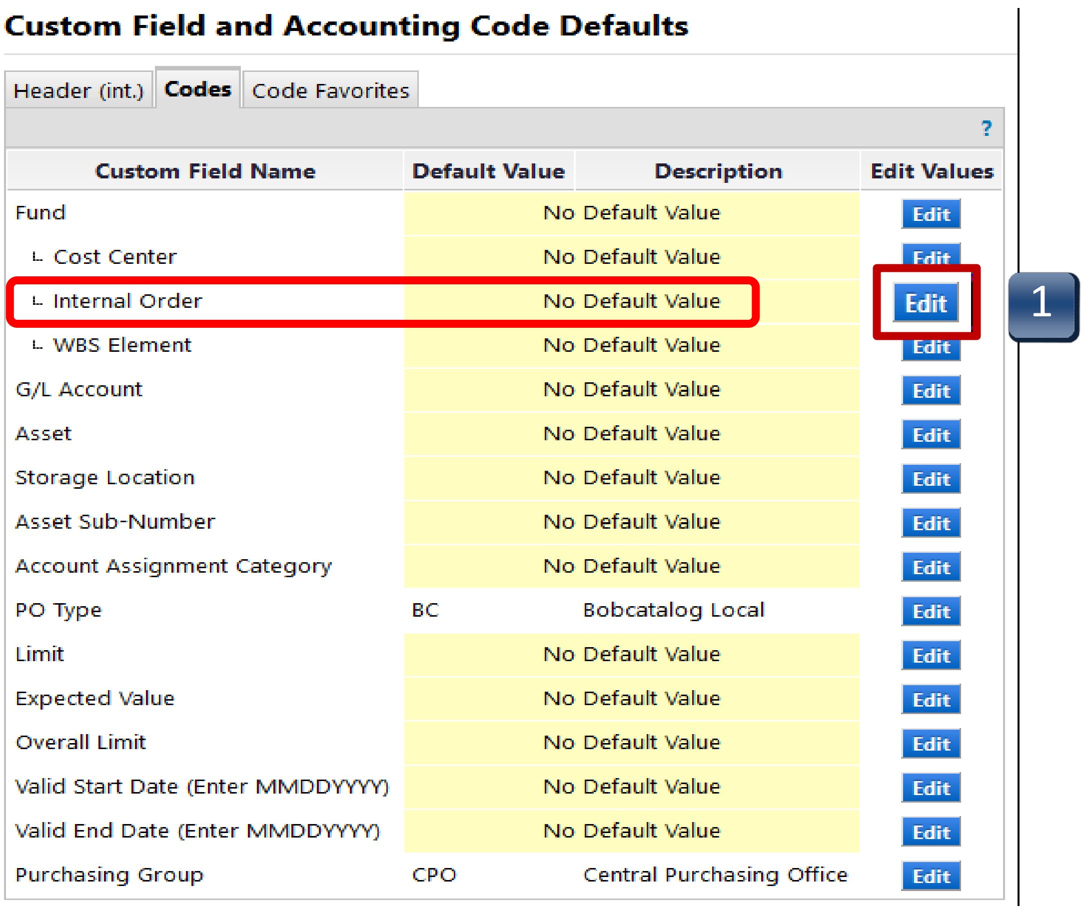




System Functions - Profile Setup – Default Funding

INTERNAL ORDER/GRANT/STATISTICAL ORDER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Internal Order** value. Values selection menu appears.


Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

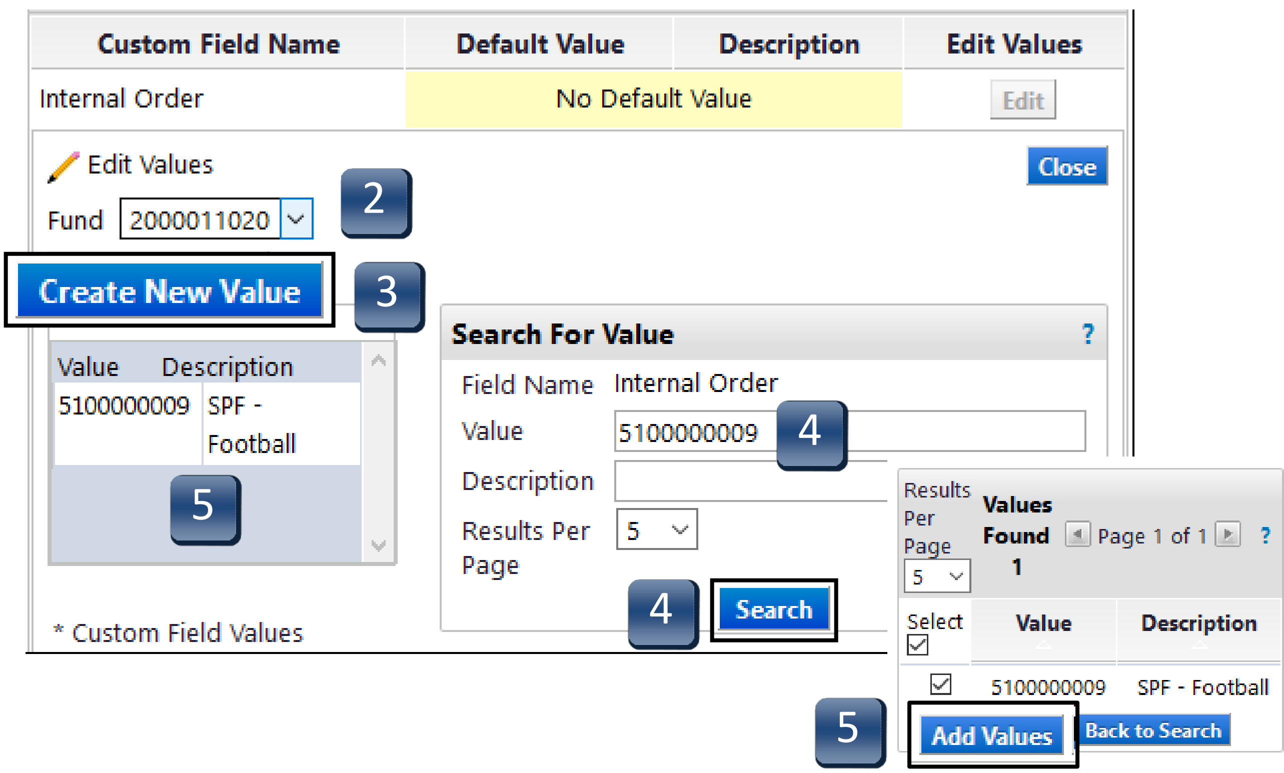
Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
∟ Cost Center		No Default Value	Edit
∟ Internal Order		No Default Value	Edit
∟ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

STEP 2: If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.

STEP 3: Click on the **Create New Value** button. The **Search For Value** box appears.

STEP 4: Type Internal Order into the **Value** field in the **Search For Value** box and click **Search**. If unknown, or you will be entering multiple values, leave the Value field blank and click **Search**. Values selection menu appears.

STEP 5: Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values.** Value(s)are added to the table.



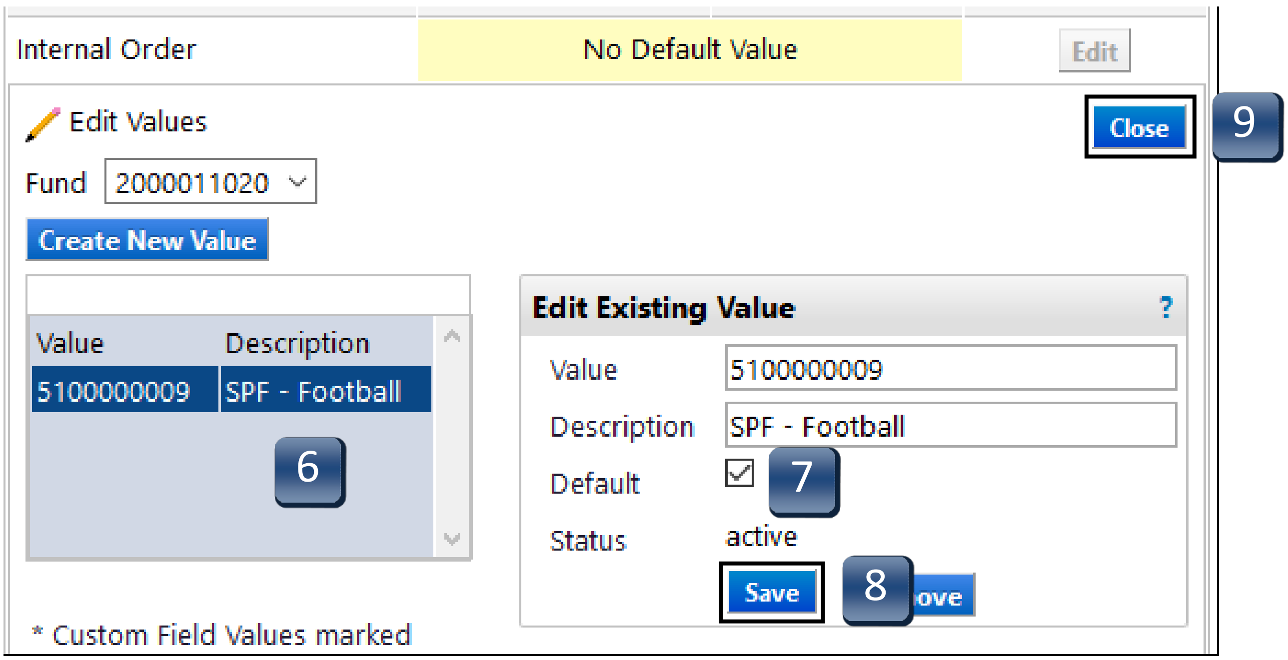
System Functions - Profile Setup – Default Funding

STEP 6: To set a default Internal Order, click on the Description of the value you wish to make Default. **Edit Existing Value** menu appears.

STEP 7: Check the **Default** box to set this number as the default value for this field.

STEP 8: Click **Save**. New default value has been saved.

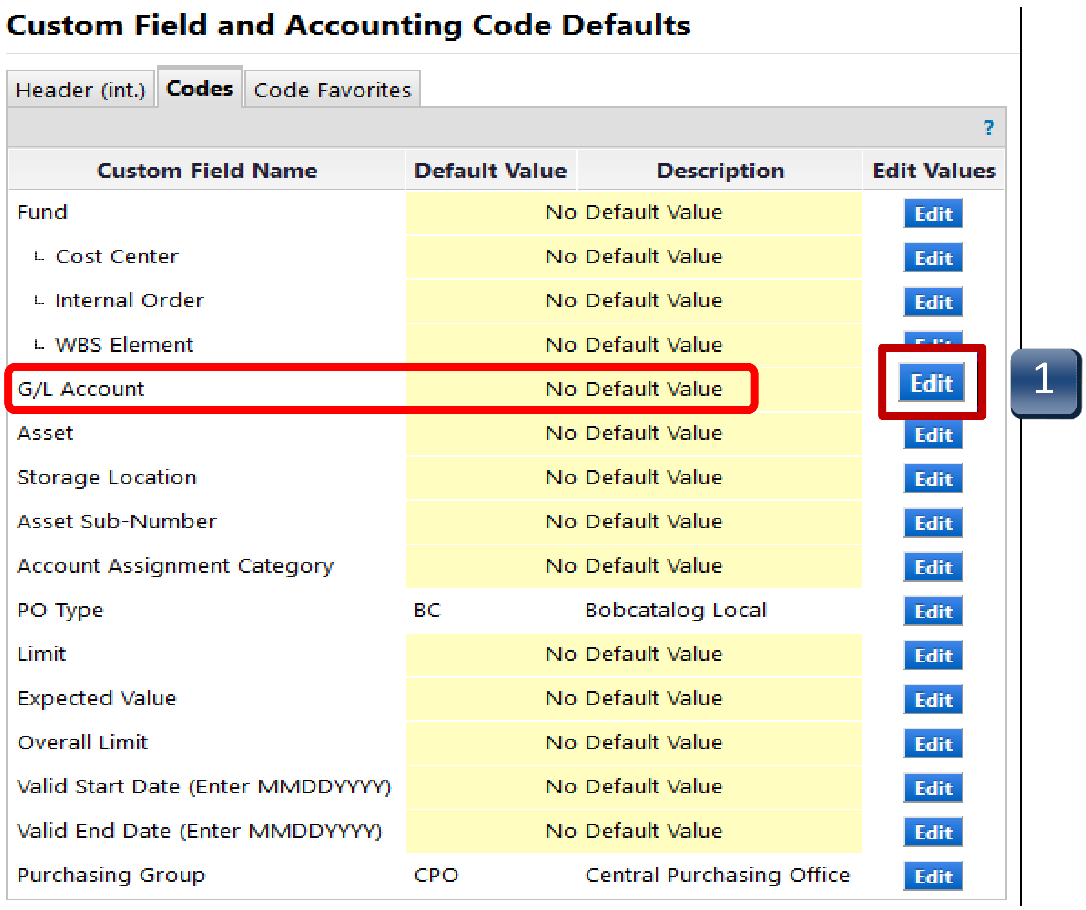
STEP 9: Click **Close** to return to Codes tab screen.



System Functions - Profile Setup – Default Funding

G/L ACCOUNT

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **G/L Account** value. Values selection menu appears.



Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
∟ Cost Center		No Default Value	Edit
∟ Internal Order		No Default Value	Edit
∟ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

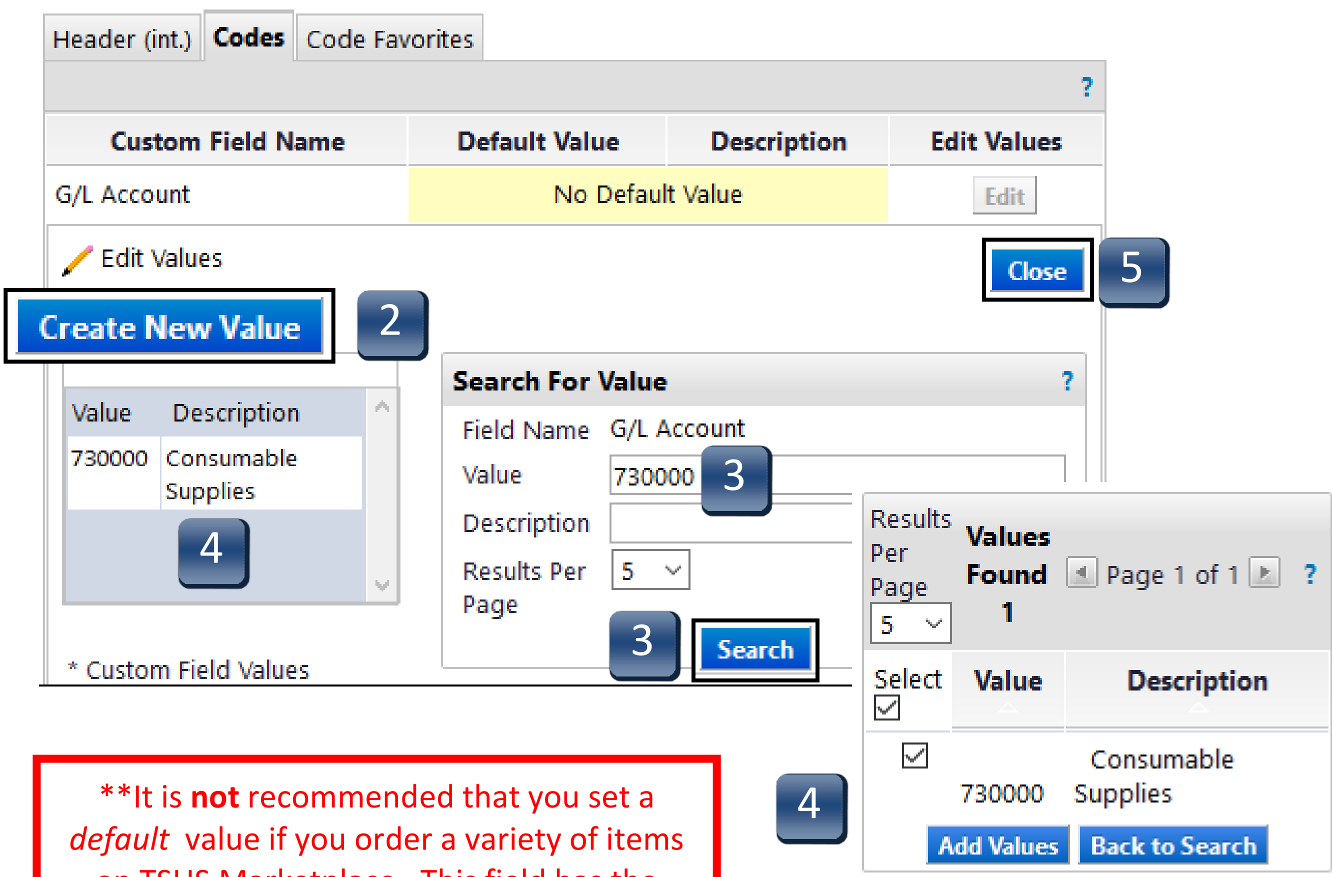
System Functions - Profile Setup – Default Funding

STEP 2: Select **Create New Value**. **Search For Value** menu appears.

STEP 3: Type a G/L code into the **Value** field and click **Search**.
If unknown, or you will be entering multiple values, leave the **Value** field blank and click **Search**. Values selection menu appears.

STEP 4: Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions. If you choose to have a default G/L, click the Default check box. You can also select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.

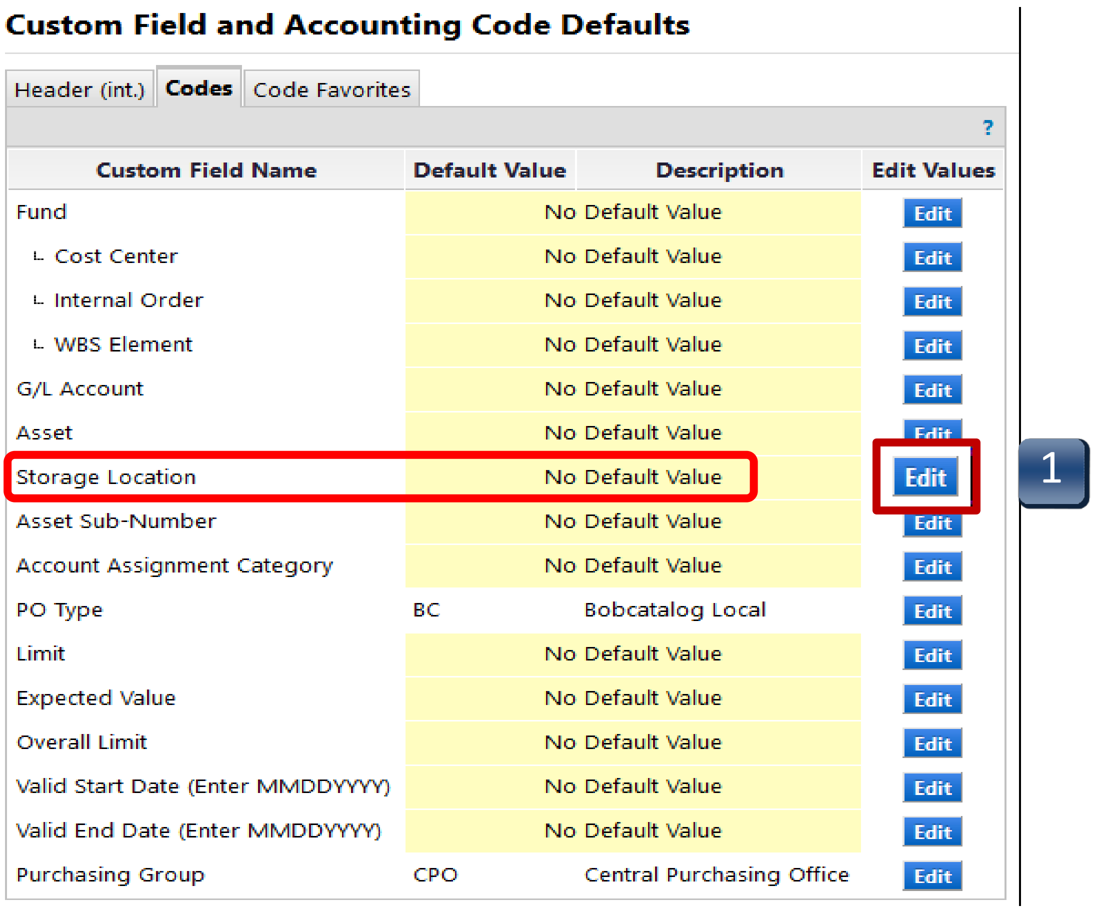
STEP 5: Click **Close** to return to Code tabs screen.



It is **not recommended that you set a *default* value if you order a variety of items on TSUS Marketplace. This field has the potential to change with every purchase.**

STORAGE LOCATION

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Storage Location** value. Values selection menu appears.



Custom Field and Accounting Code Defaults

Header (int.) | **Codes** | Code Favorites

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
∟ Cost Center	No Default Value		Edit
∟ Internal Order	No Default Value		Edit
∟ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

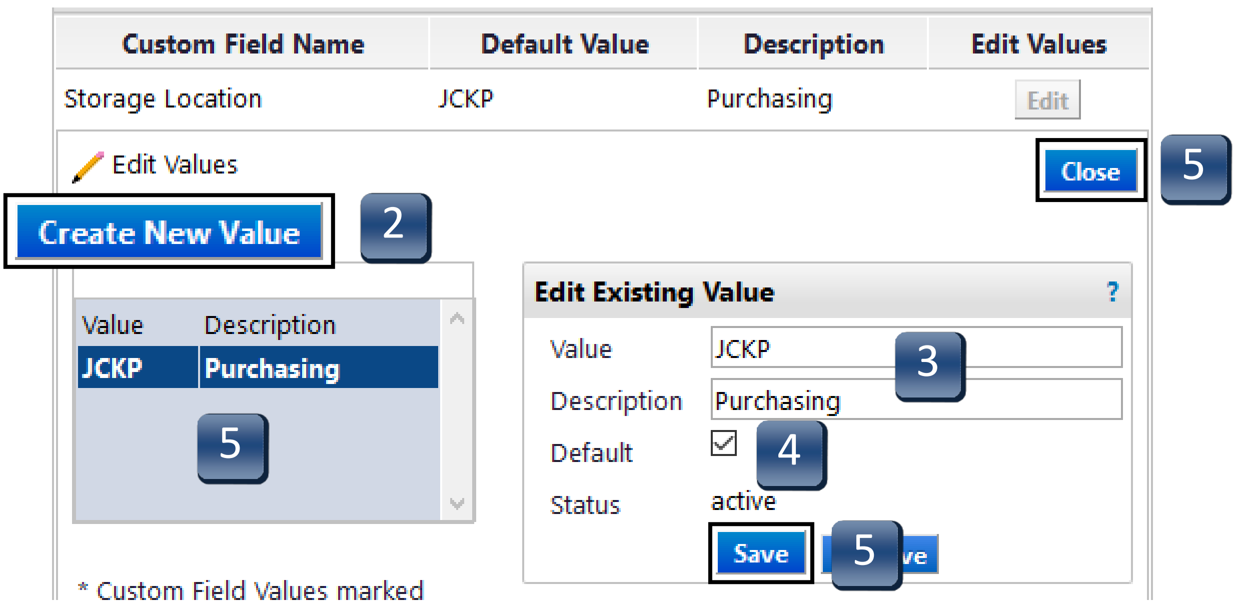
System Functions - Profile Setup – Default Funding

STEP 2: Select **Create New Value**. **Search for Value** menu appears.

STEP 3: Type a Storage Location code into the **Value** field.

STEP 4: If you want this value to be the default value, check the **Default** box.

STEP 5: Click **Save.** Value added to the table. Click **Close** to return to Codes tab screen.



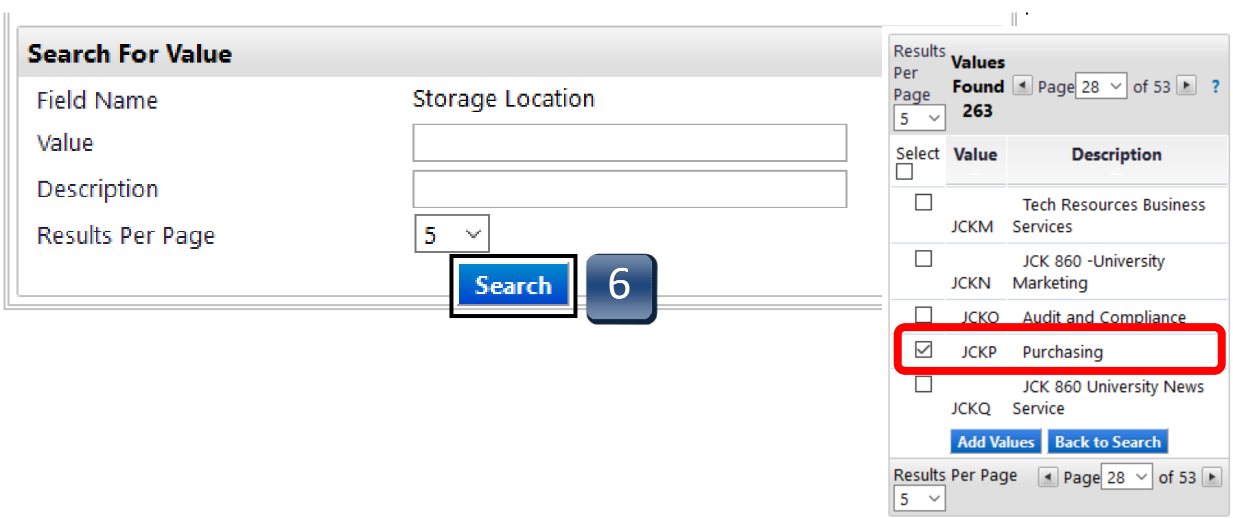
STEP 6: If **Storage Location** is unknown, or you will be entering multiple values, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.

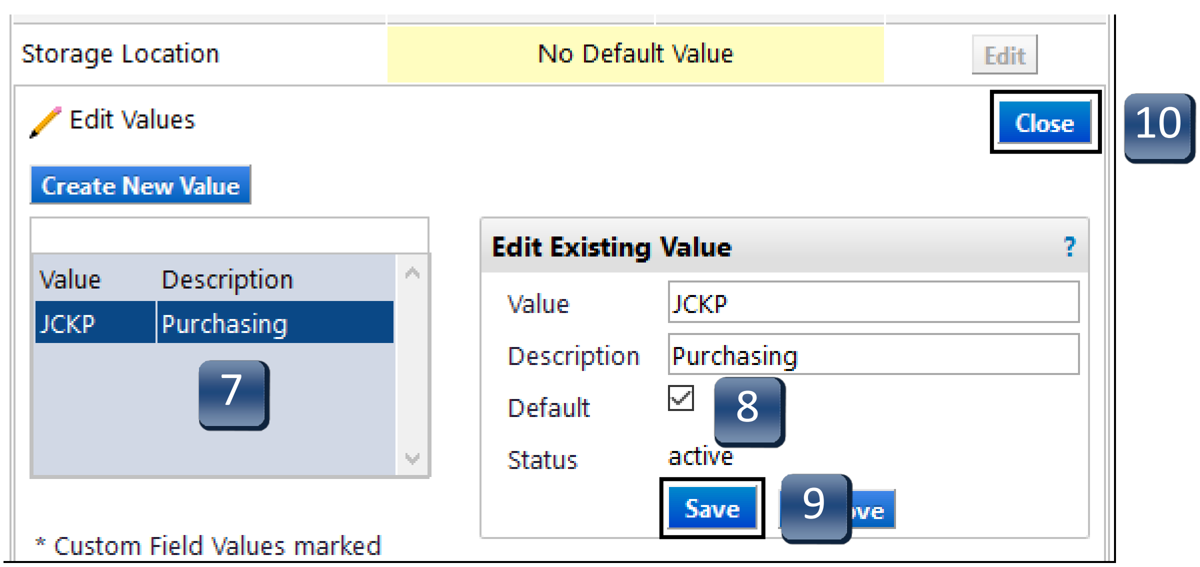
STEP 7: To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.

STEP 8: Check the **Default** box to set this number as the default value for this field.

STEP 9: Click **Save**. New default value has been added.

STEP 10: Click **Close** to return to Codes tab screen.





Vendor Verification Requirements – Before a Requisition is Created

Once you determine the vendor, the vendor is required by federal and state governments, to be checked to determine if there are any sanctions or debarments that would prohibit the university from doing business with them for **ALL** purchases $15,000 and above. The sites are:

https://mycpa.cpa.state.tx.us/coa/ – Franchise Tax

https://sam.gov/SAM/ - SAM – Federal Debarment

https://fmcpa.cpa.state.tx.us/tpis/ – Vendor Warrant/Payment Hold

https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php – State of Texas Debarment

https://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx – The is OFAC

https://comptroller.texas.gov/purchasing/publications/divestment.php –This is the Comptroller site that has all the links except OFAC

All documentation from the sites verifying they have been checked must be attached to the requisition

See **Internal** Notes and Attachments section. These documents are not added to the External Notes and Attachments.

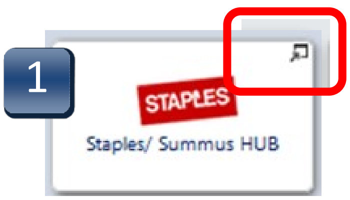
Search & Order - Punch-Out Vendors

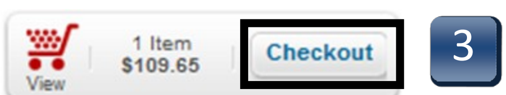
STEP 1: Click selected supplier's catalog button. You will be taken to the supplier's "punch-out" site. Navigation on each supplier's catalog will vary. All Punch-Outs have a small icon in the top right corner.
To *cancel* a Punch-Out, select **Cancel Punch-Out button at the top of the screen.

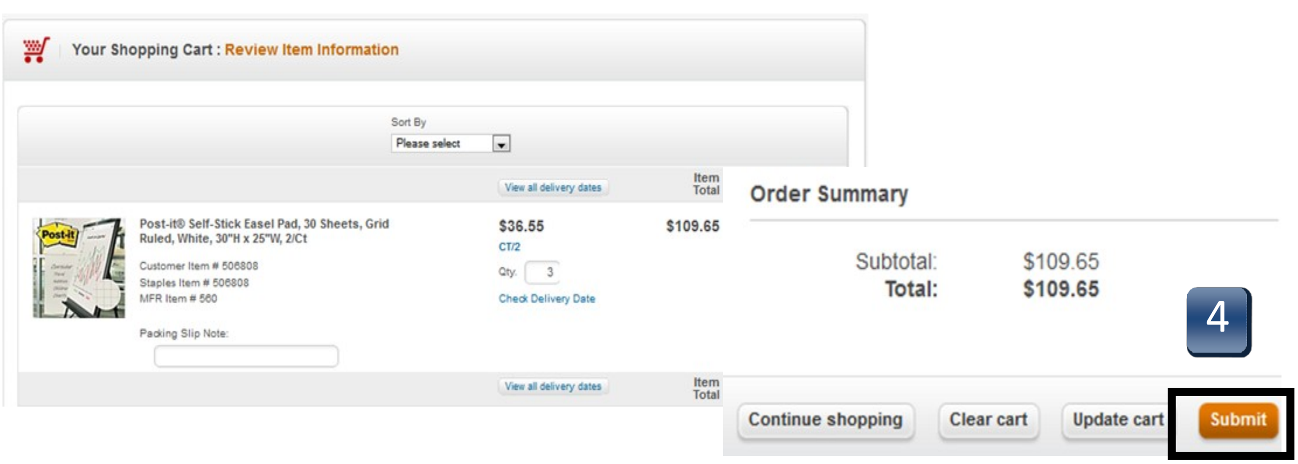
STEP 2: Select your items by entering **quantity** desired, then click **Add to Cart**.

STEP 3: Click **Checkout**.

STEP 4: Review order, then click **Submit**.



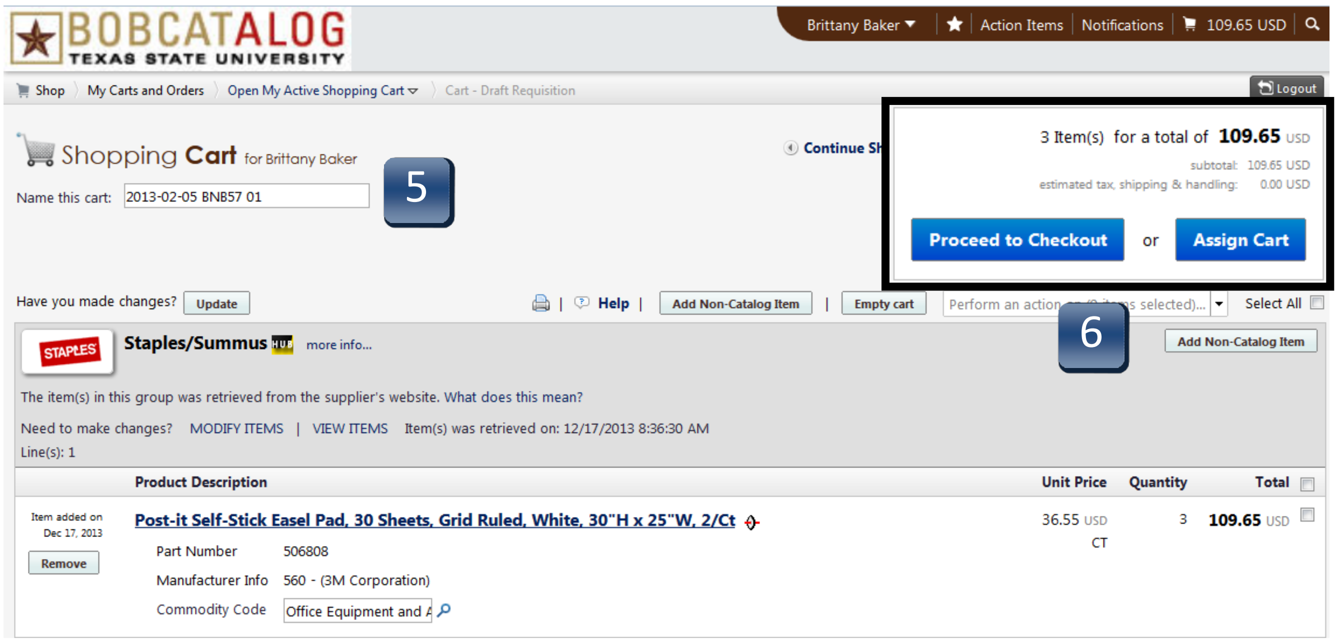




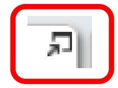
Search & Order - Punch-Out Vendors

STEP 5: Cart returns to **TSUS Marketplace**

STEP 6: Based on your assigned role, Select **Proceed to Checkout** or **Assign Cart**.

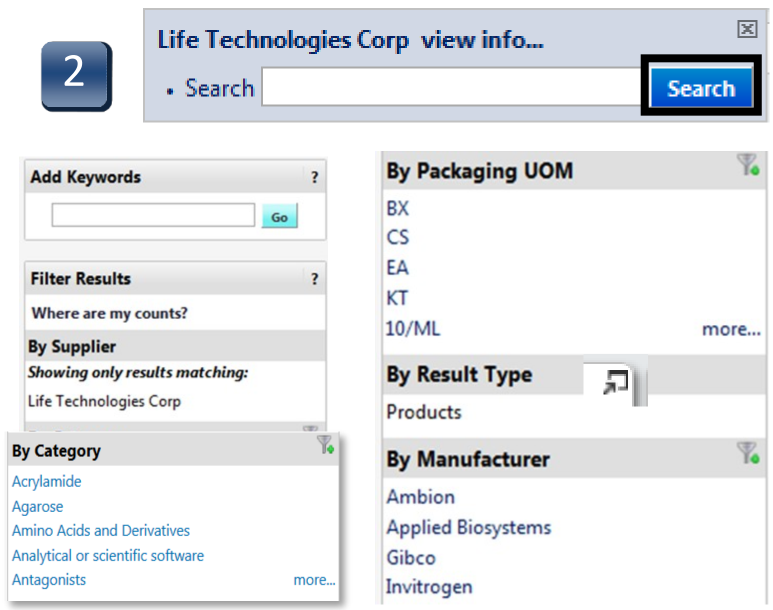


Search & Order - Hosted Vendors

STEP 1: Click supplier's catalog button.
**Hosted suppliers do not have an icon in the top right corner. 

STEP 2: Search via stock/item number or search by category filters. Leave Search field blank and simply click **Search** to filter by category.

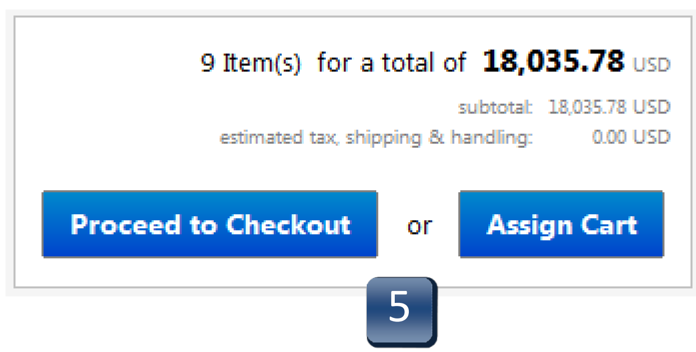
STEP 3: Enter **quantity** desired, then press **Add to Cart**.



Search & Order - Hosted Vendors

STEP 4: After all items are added, click on the link that says__________**item(s) added, view cart**.

STEP 5: Based on your assigned role, click on **Proceed to Checkout** or **Assign Cart**.



Create a Non-Catalog Requisition

STEP 1: Click on the **Non-Catalog item** hyperlink menu.

STEP 2: Enter **Supplier**.

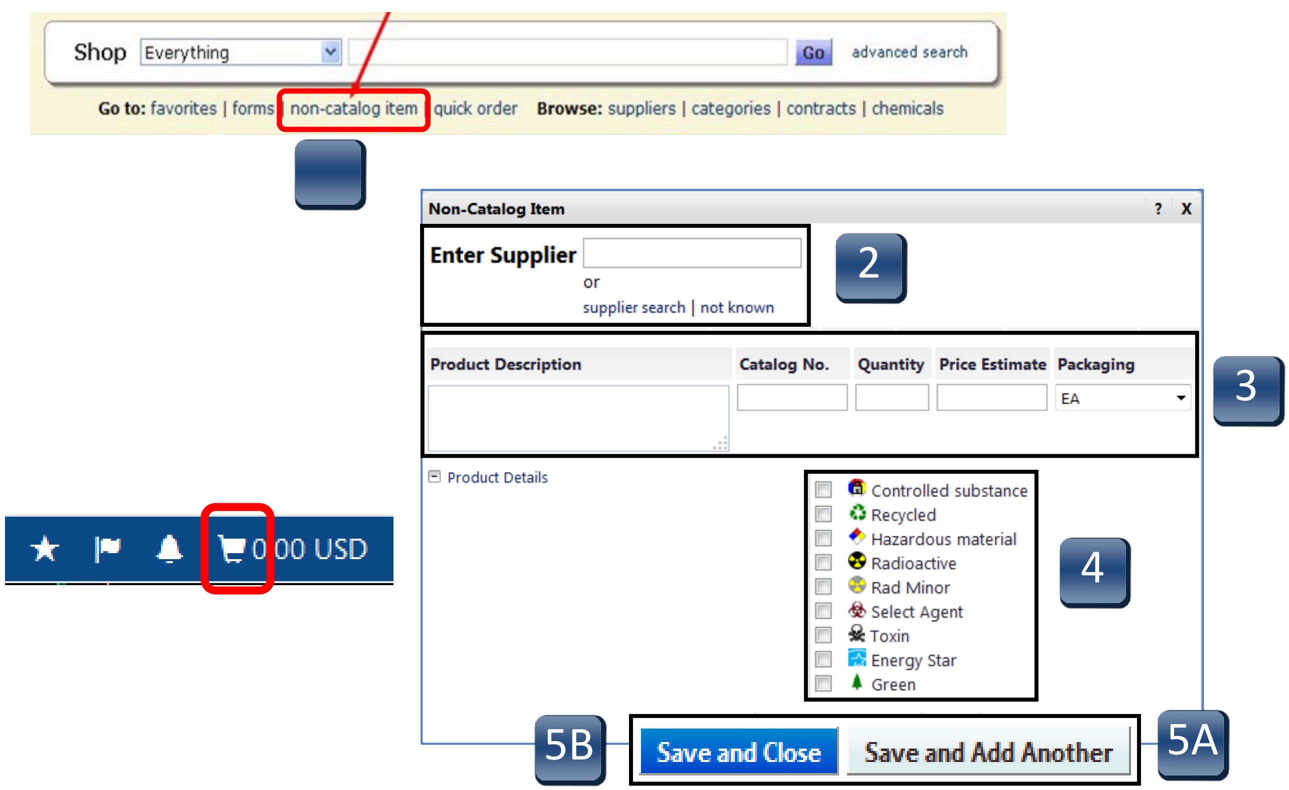
STEP 3: Enter Product Description, Catalog #, Quantity, Price Estimate, & Packaging fields. If you do not have a **catalog number**, leave this field blank.

STEP 4: Leave all special restrictions blank. The GL used will populate this section. **No entry is need by the user.**

STEP 5: Once the form is filled out, select one of the following actions:

A. To add another line for the same supplier, click **Save and Add Another**. Once you have added all line items, click **Save and Close**. Click on the **Cart** icon from the top banner in the right corner to access the quick view cart.

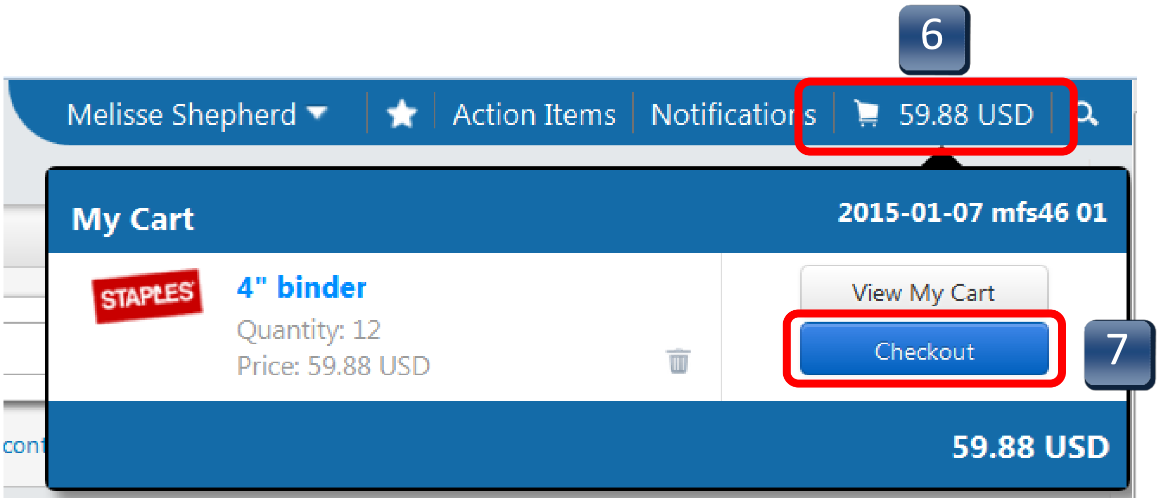
B. If you are finished adding lines, click **Save and Close** to add the data to your current cart. Click on the Cart icon from the top banner in the right corner to access the quick view **cart** with the ability to checkout from there.



Create a Non-Catalog Requisition

STEP 6: Access your newly created cart from the top banner quick view.

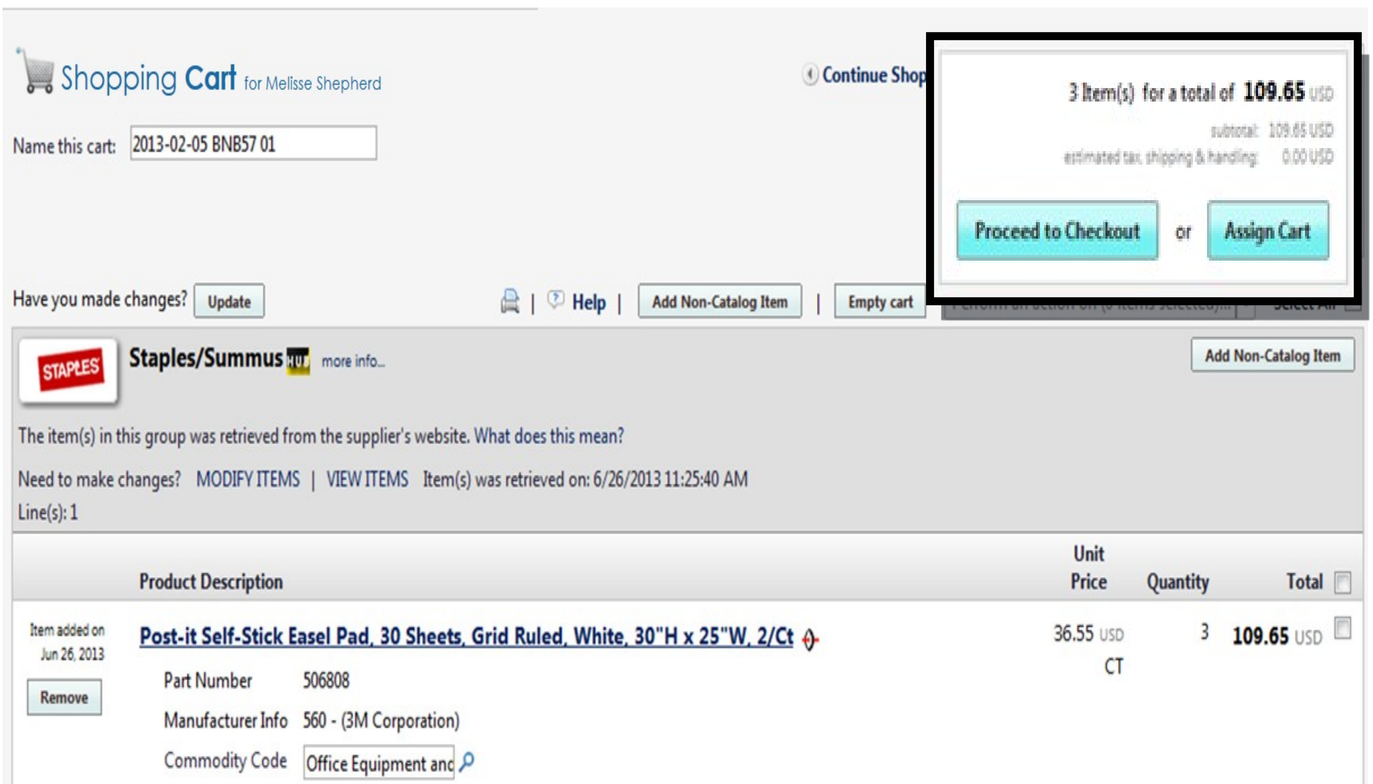
STEP 7: If you are ready to checkout, click on the **Checkout** button and complete the Checkout process. (See **Completing the Checkout Process** section of this user guide)



Completing the Checkout Process

Based on your assigned role, you will select:

Proceed to Checkout (Requisitioner)
or
Assign Cart (Shopper)

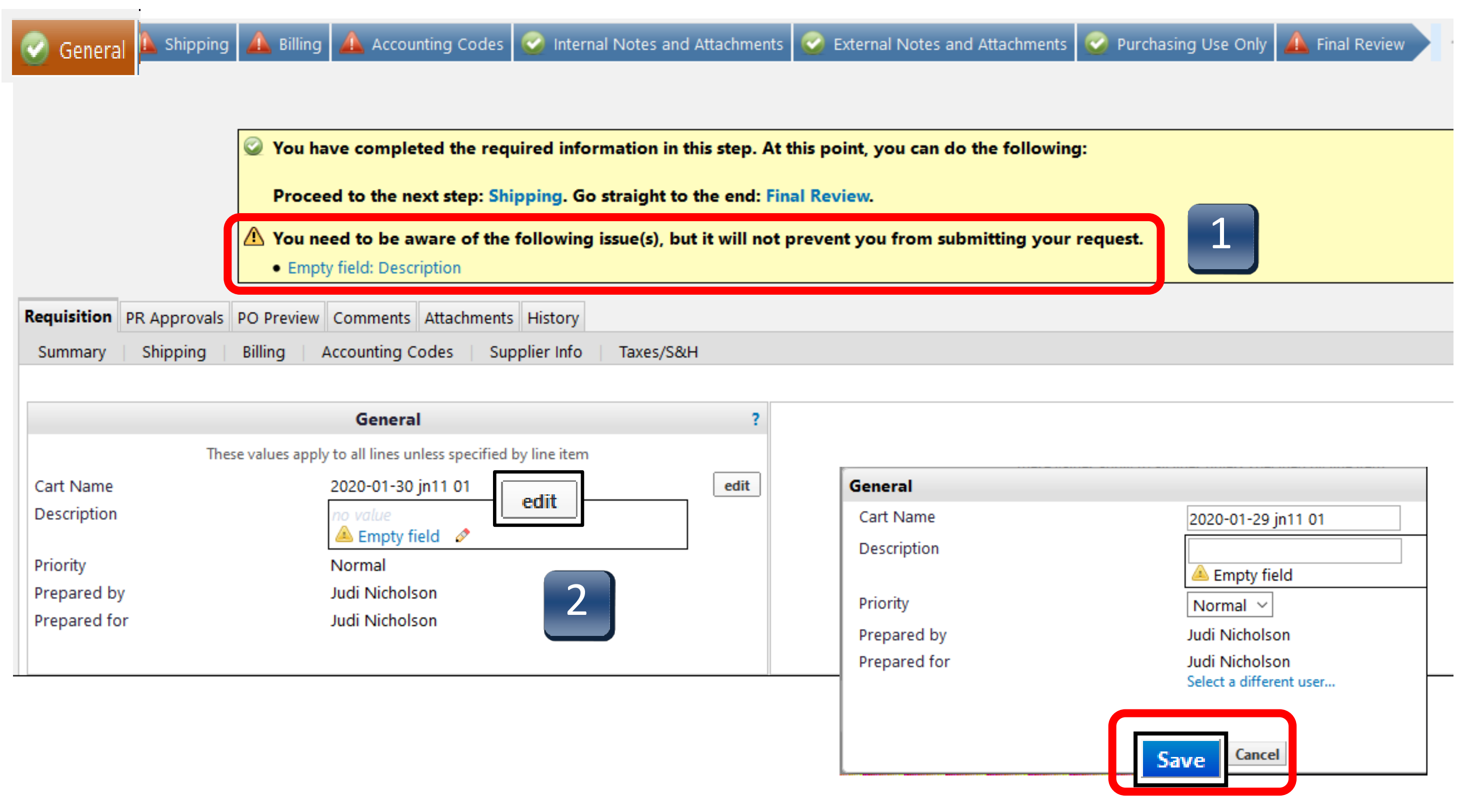


Completing the Checkout Process – General Tab

Once Place Order has been selected, you are taken to the Final Review workflow. Any tabs with a red triangle require additional information to complete.

STEP 1: Be aware of any alerts on any of the check-out tabs. A box will display a message if there are any errors and if they are critical stops and the information needs to be entered before you can proceed or the message is a warning and you can proceed with the next step without corrective action.

STEP 2: If the message is a warning, you can enter in the information if you choose. Click on the **edit** button to edit the cart information. You can change the Cart Name, Description, Priority, and Prepared For fields, in case you are submitting this cart for someone else. Once the information has been entered, click **Save.**



Completing the Checkout Process – Shipping Tab

STEP 1: Click **Required field** in the Shipping box to insert address.

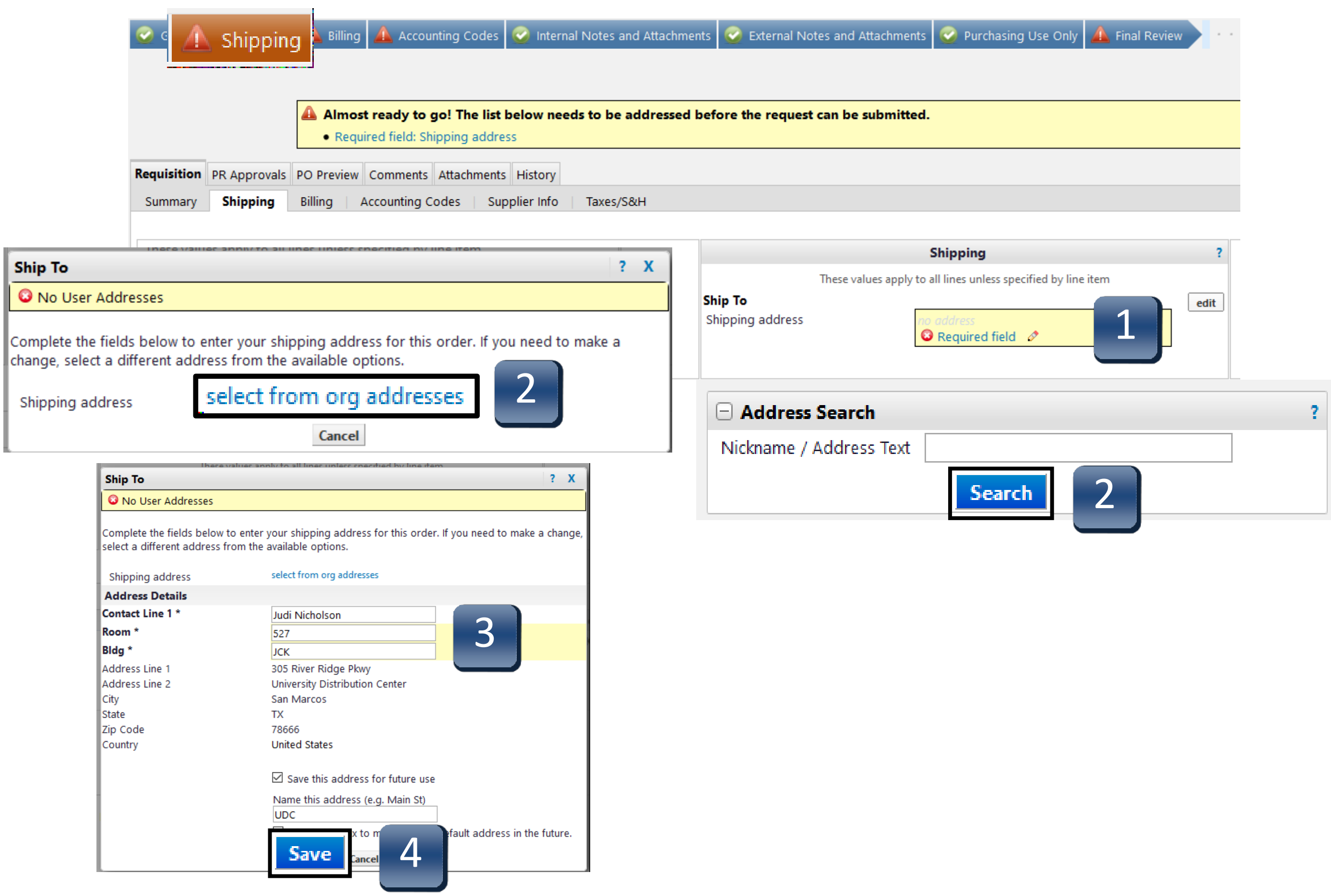
STEP 2: Click on **select from org addresses** and select your Shipping Address from the drop-down-menu. **UDC** is the standard org address for most departments.

Additional org addresses can be selected by following the **select from org addresses link. You can either enter a nickname/address or click on **Search**. Select your address from the drop-down menu.

**If you have designated a list of favorite/default Ship To addresses when setting up defaults in your profile you will only see those in the drop-down menu.

STEP 3: Enter contact information in **Address Details** fields.

STEP 4: Click **Save**.



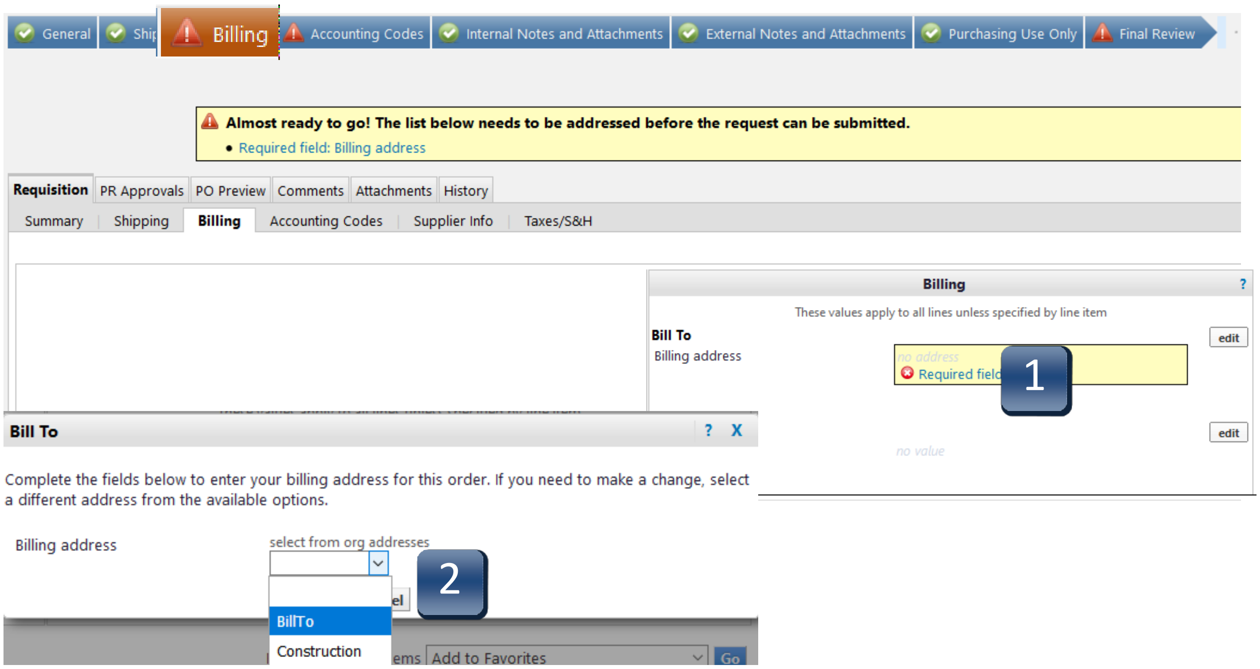
To designate a default **Shipping Address**, see **Profile Setup**

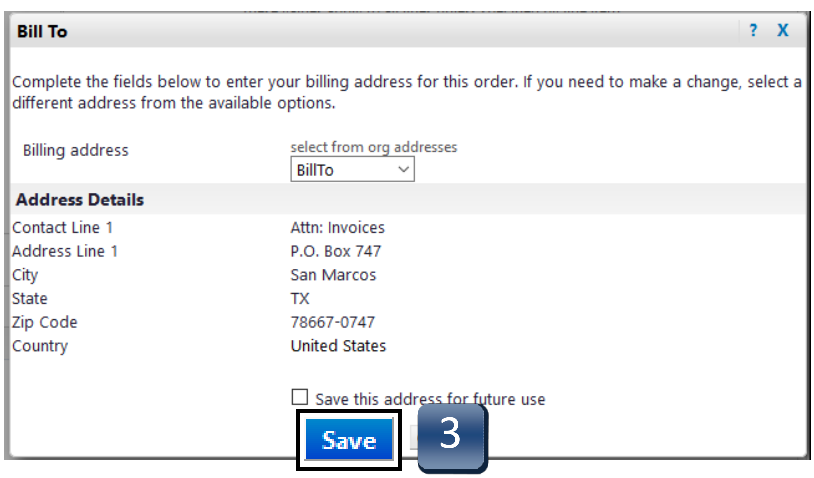
Completing the Checkout Process – Billing Tab

STEP 1: Click **Required field** in the Billing box.

Step 2: Click on the down arrow and select **BillTo**.

STEP 3: Click **Save**.





To designate a default **Billing Address**, see **Profile Setup section**.

Completing the Checkout Process – Accounting Codes Tab

ASSET

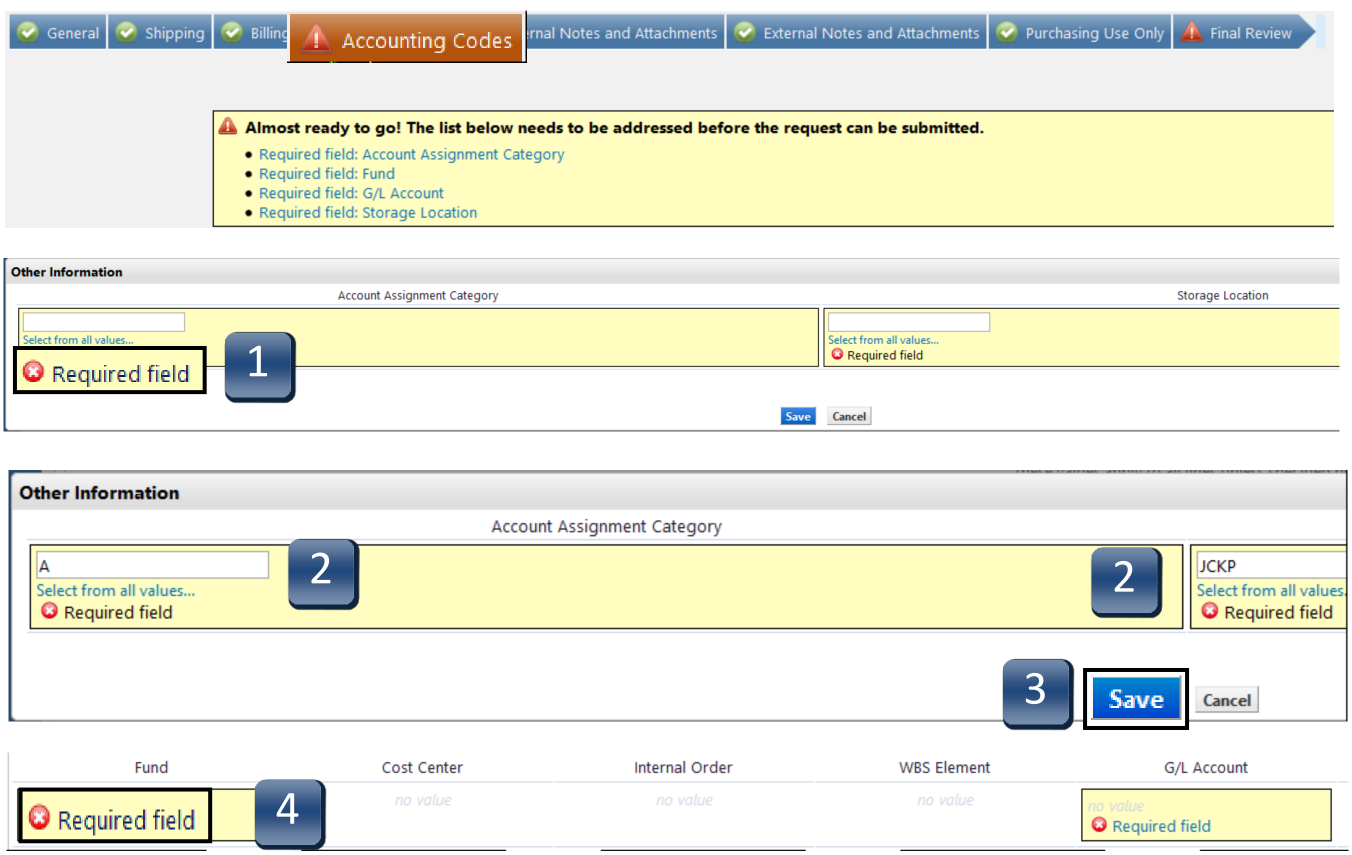
Accounting Codes is the most important section in the checkout process!

STEP 1: Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.

STEP 2: Type **A** in **Account Assignment Category** field. Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.

STEP 3: Click **Save**.

STEP 4: Click **Required field** under **Fund**. Accounting Codes menu opens. Proceed to next page to complete entry.



Completing the Checkout Process – Accounting Codes Tab

ASSET

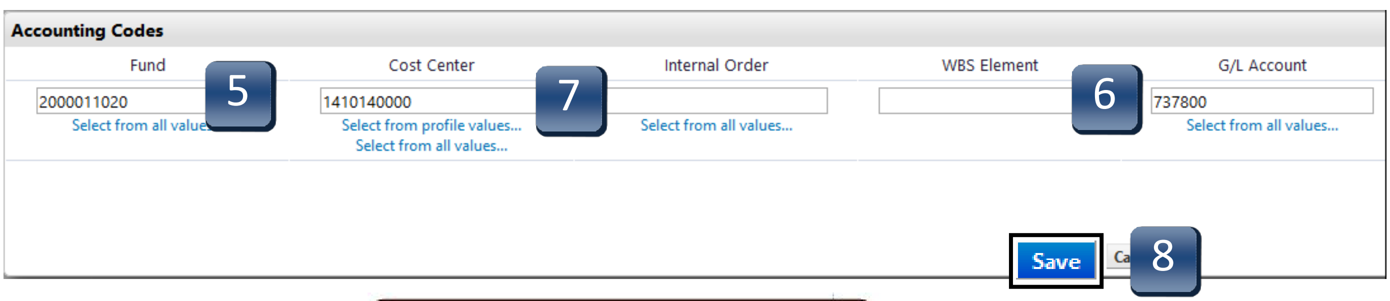
Accounting Codes is the most important section in the checkout process!

STEP 5: Type in the appropriate **Fund** or select from defaulted profile values, or select from all values list.

STEP 6: Type in the appropriate **G/L** number, select from defaulted profile values, or select from all values list.
****Correct G/L *must* be entered to generate Asset Review workflow where Materials Management will add the Asset number. Use the GL/Asset Reference guide if necessary.**

STEP 7: Based on Funding, enter either **Cost Center** or **Internal Order** number.

STEP 8: Click **Save**.



Asset GL Codes

737800	Computers
737800	Printers
737800	iPads/Tablets, Smartphones
737400	TVs
737400	Cameras, Camcorders

See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

COST CENTER

Accounting Codes is the most important section in the checkout process!

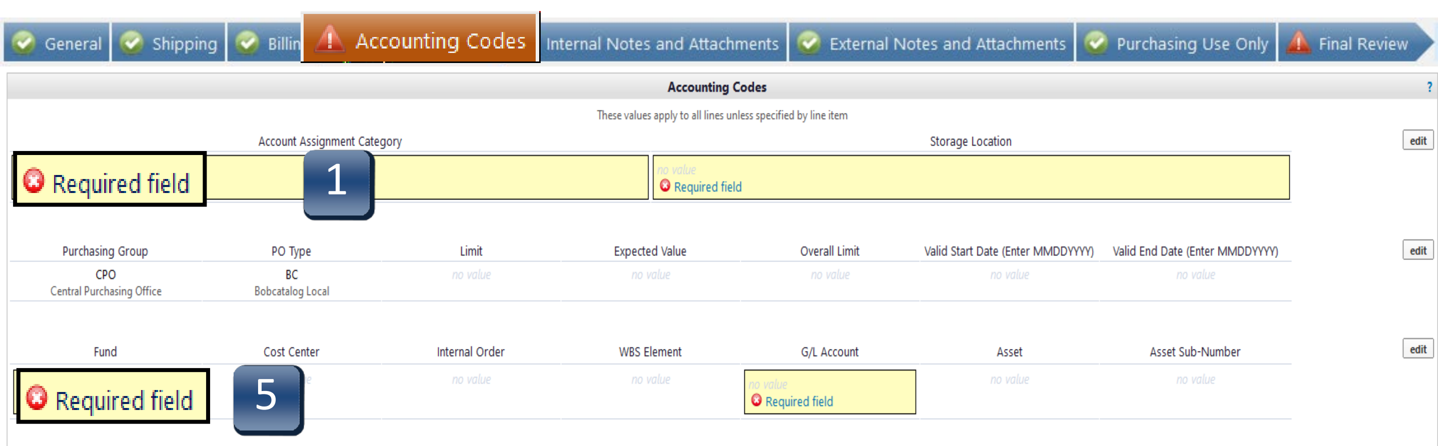
STEP 1: Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.

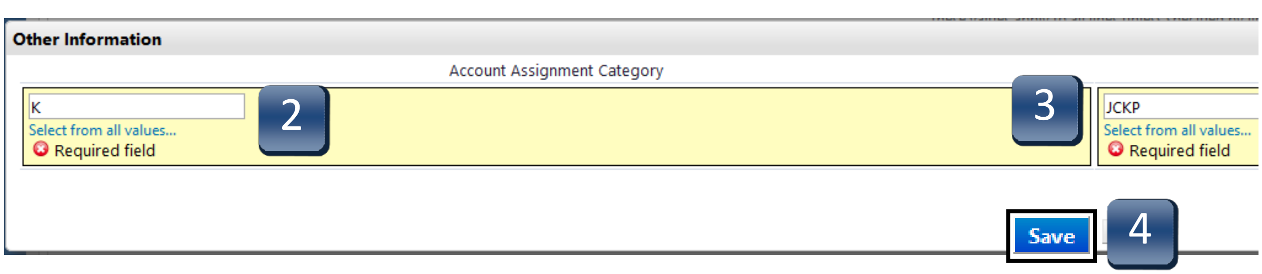
STEP 2: Type **K** in **Account Assignment Category** field.

STEP 3: Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under **Fund**. Accounting Codes menu opens. Proceed to next page to complete entry.





Completing the Checkout Process – Accounting Codes Tab

COST CENTER

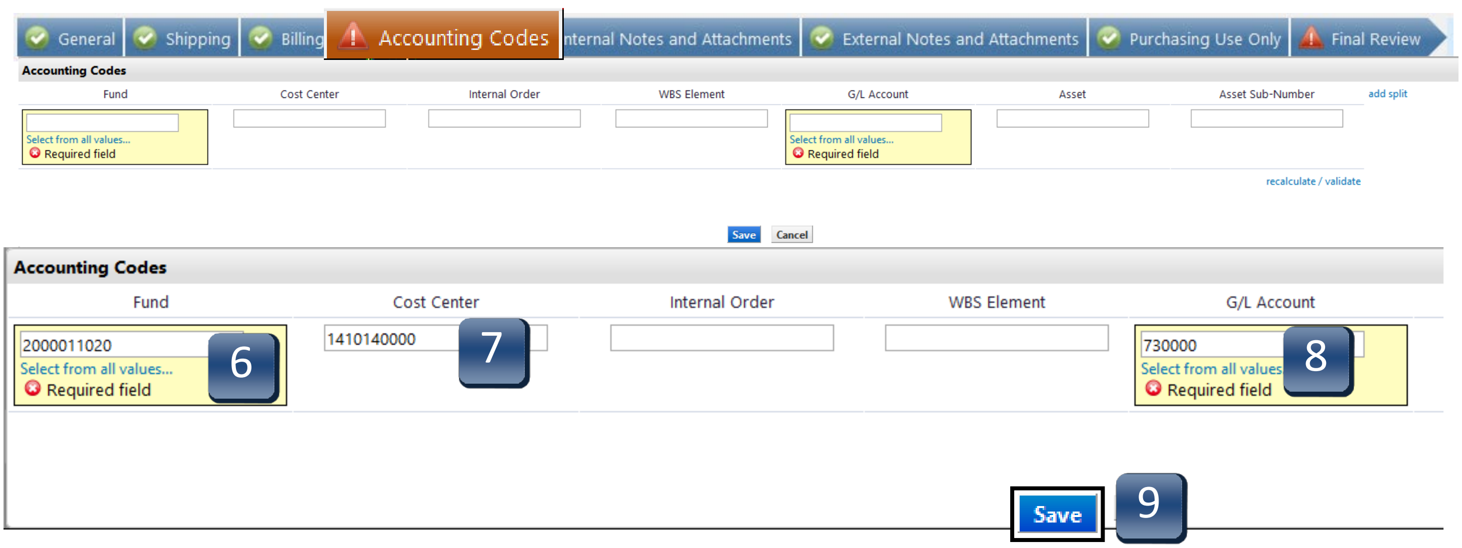
Accounting Codes is the most important section in the checkout process!

STEP 6: Enter **Fund** (Cost Center funds begin with either 1 or 2), select from defaulted profile values, or select from all values list.

STEP 7: Enter **Cost Center** number or select from defaulted profile values, or select from all values list..
**Internal Order field should be *blank* when using K as the Account Assignment Category.

STEP 8: Type in **G/L** number, select from defaulted profile values, or select from all values list.

STEP 9: Click **Save**.



See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

INTERNAL ORDER

Accounting Codes is the most important section in the checkout process!

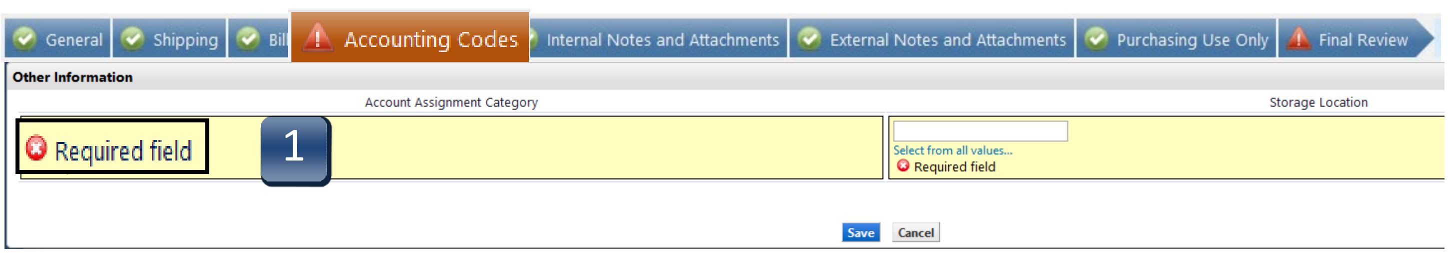
STEP 1: Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.

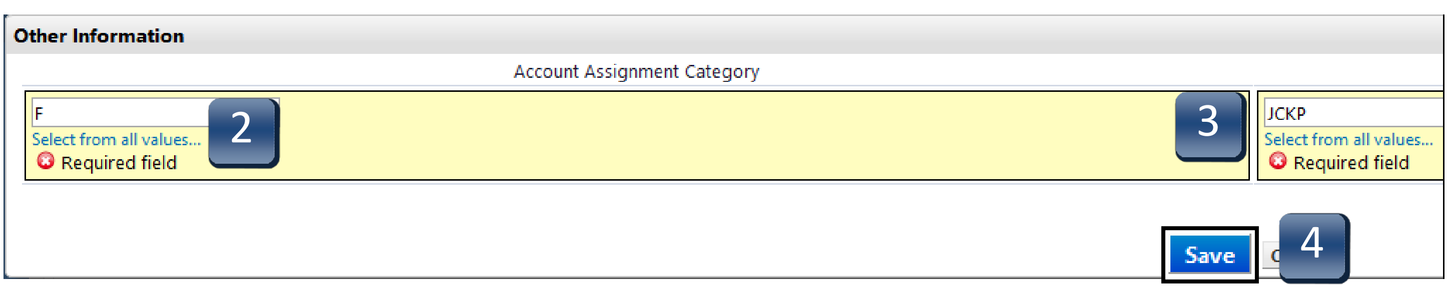
STEP 2: Type **F** in **Account Assignment Category** field.

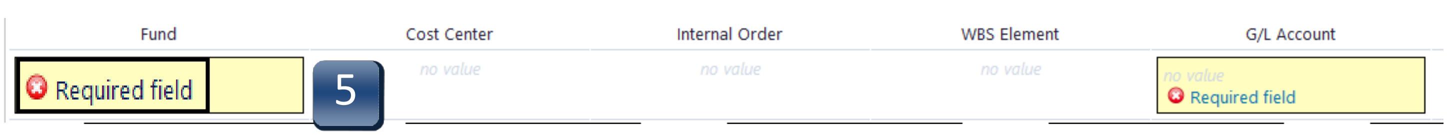
STEP 3: Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.







Completing the Checkout Process – Accounting Codes Tab

INTERNAL ORDER

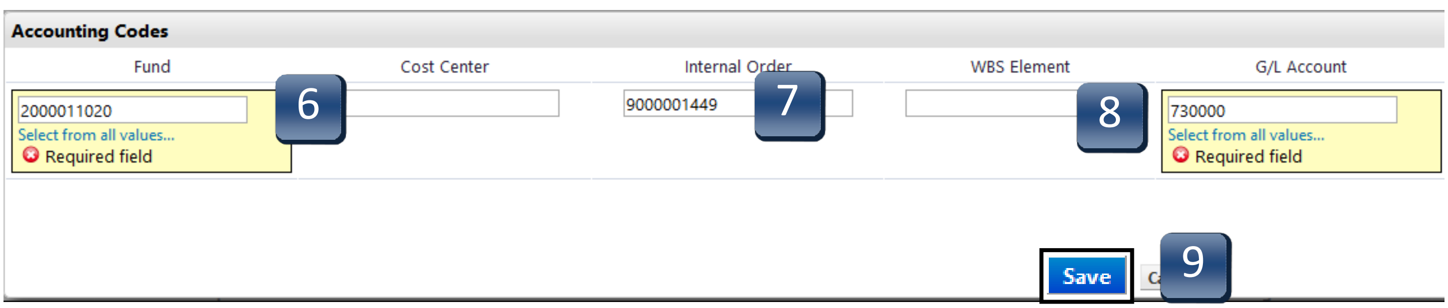
Accounting Codes is the most important section in the checkout process!

STEP 6: Enter **Fund** (Internal Order funds begin with either 7 or 8.), select from defaulted profile values, or select from all values list.

STEP 7: Enter **Internal Order** number, select from defaulted profile values, or select from all values list.
**Cost Center field should be *blank* when using F as the Account Assignment Category.

STEP 8: Type in G/L number, select from defaulted profile values, or select from all values list.

STEP 9: Click **Save**.



See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

STATISTICAL INTERNAL ORDER

Accounting Codes is the most important section in the checkout process!

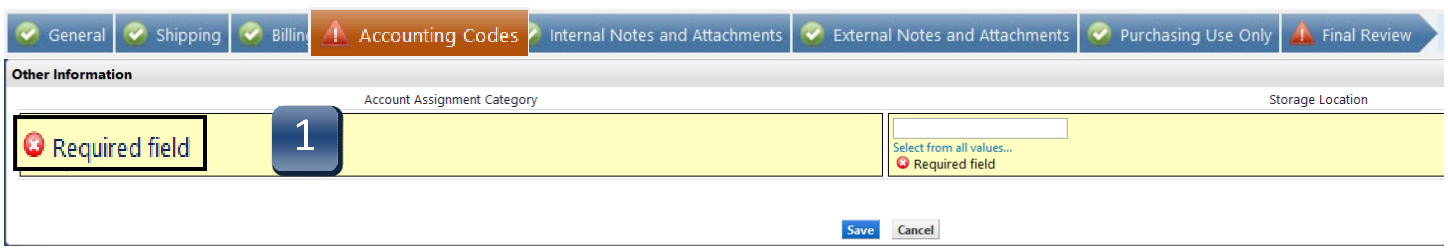
STEP 1: Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.

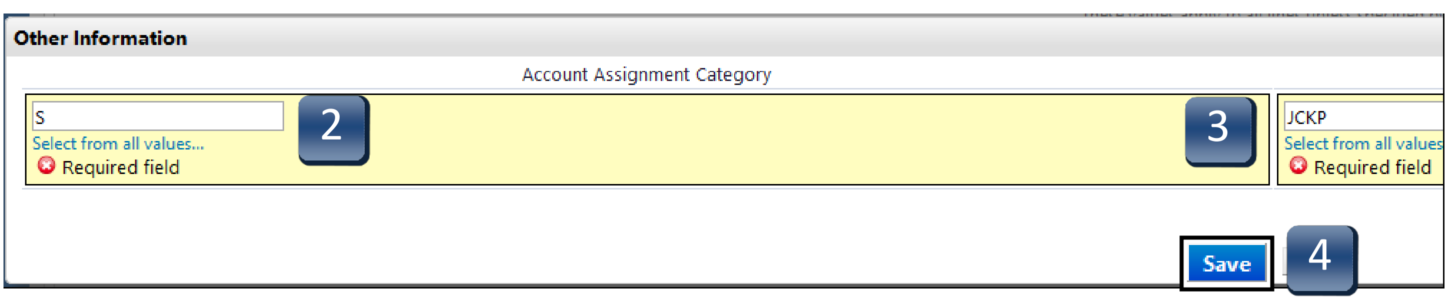
STEP 2: Type **S** in **Account Assignment Category** field.

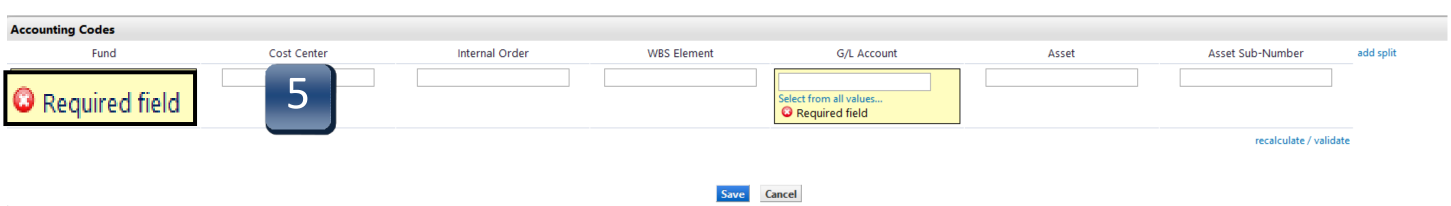
STEP 3: Enter 4-digit **Storage Location** code, select from favorite/defaulted profile values, or select from master value list.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.







Completing the Checkout Process – Accounting Codes Tab

STATISTICAL INTERNAL ORDER

Accounting Codes is the most important section in the checkout process!

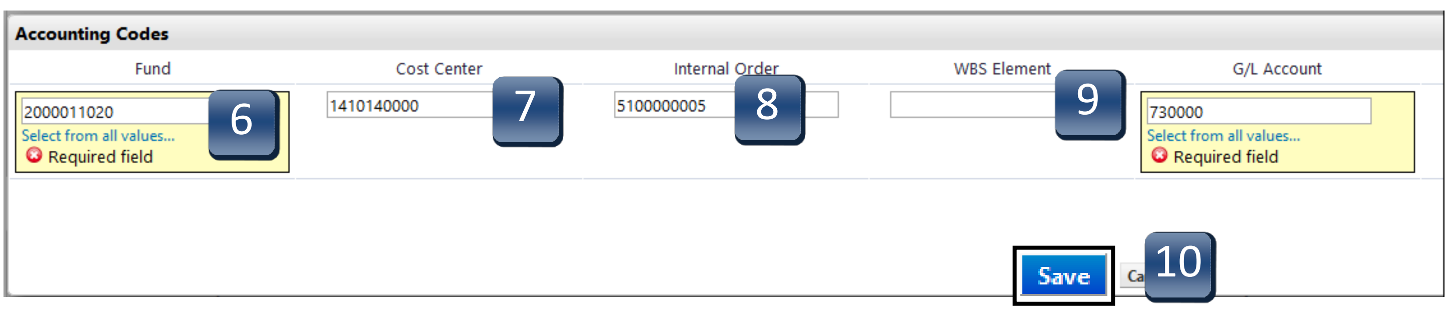
STEP 6: Enter **Fund**, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.

STEP 7: Enter **Cost Center,** select from favorite/defaulted profile values, or select from master value list.

STEP 8: Enter the **Statistical Internal Order** number in the **Internal Order field**, select from favorite/defaulted profile values, or select from master value list.

STEP 9: Enter the **G/L** number, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list

STEP 10: Click **Save**.



funding.See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

GRANTS

Accounting Codes is the most important section in the checkout process!

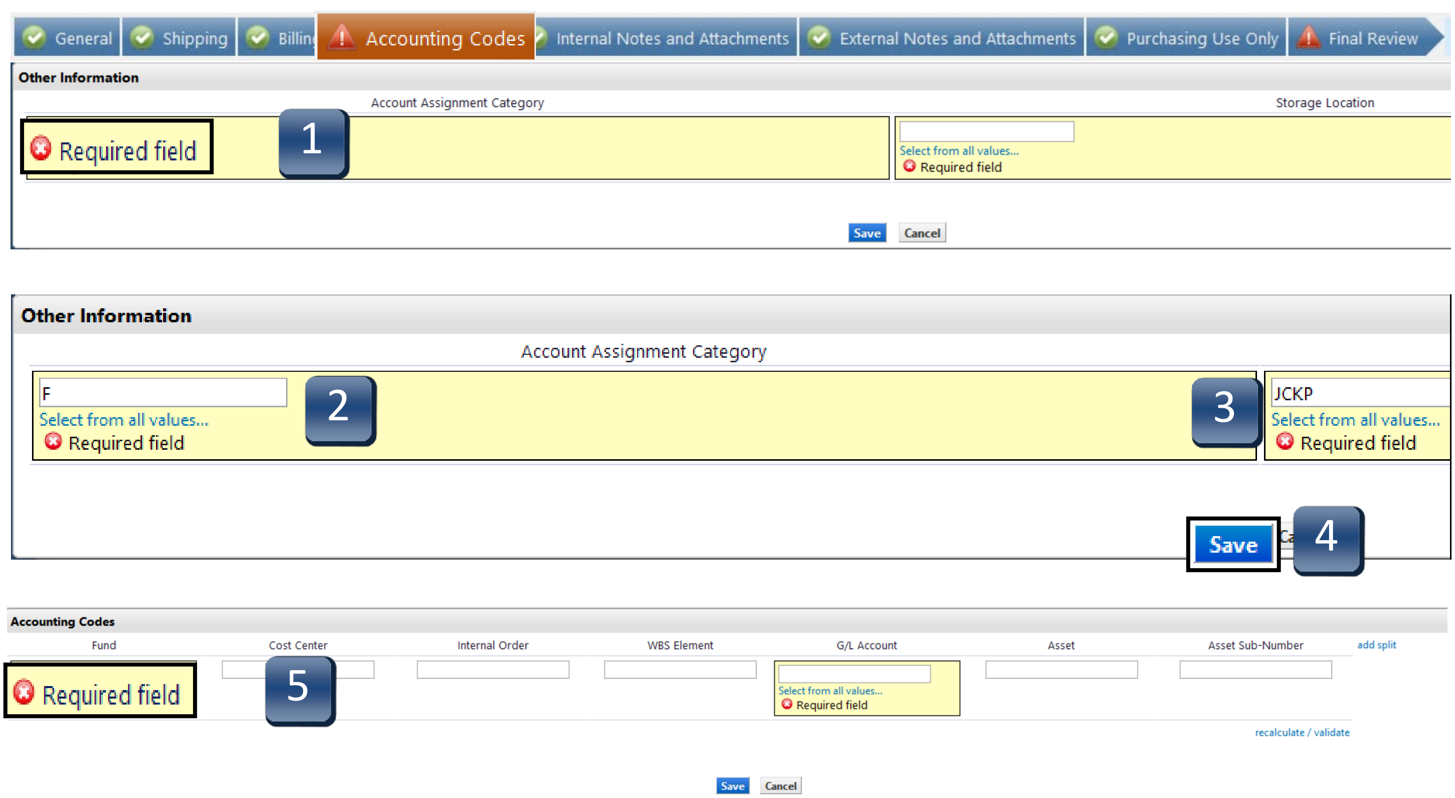
STEP 1: Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.

STEP 2: Type **F** in **Account Assignment Category** field.

STEP 3: Enter 4-digit **Storage Location** code, select from favorite/defaulted profile values, or select from master value list.

STEP 4: Click **Save**.

STEP 5: Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.



Completing the Checkout Process – Accounting Codes Tab

GRANTS

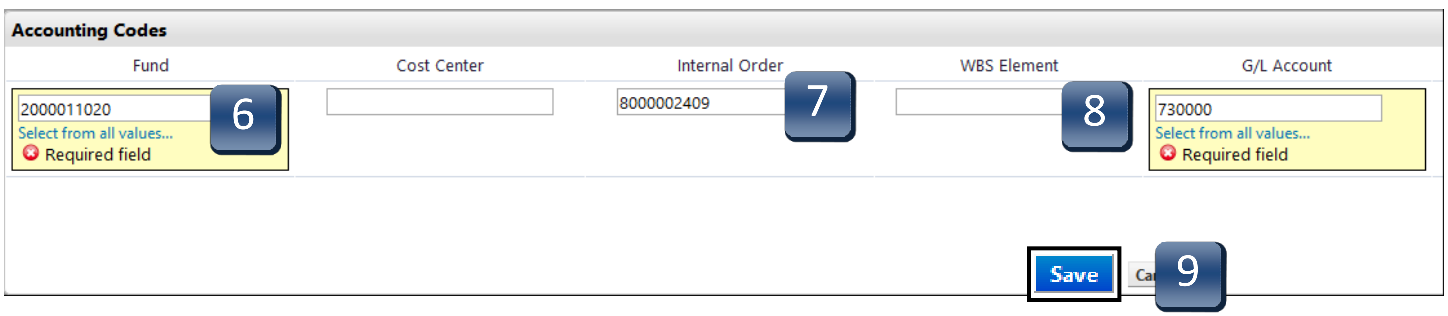
Accounting Codes is the most important section in the checkout process!

STEP 6: Enter **Fund**, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.

STEP 7: Enter the **Grant** number in the **Internal Order field**, select from favorite/defaulted profile values, or select from master value list.

STEP 8: Enter the **G/L** number, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.

STEP 9: Click **Save**.



See Multiple Funding section for instructions on splitting line item

Completing the Checkout Process – Internal Notes and Attachments

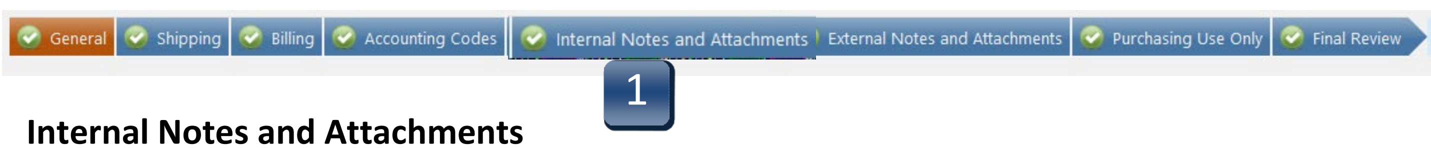
STEP 1: Click on **Internal Notes and Attachments** or **Internal Notes and Attachments** tabs. This is optional.

**Internal attachments are NOT seen by the vendor. Use Internal for attachments for Purchasing or Accounts Payable offices, e.g. Sole Source/Proprietary form, Bids, Quotes, Proposals.

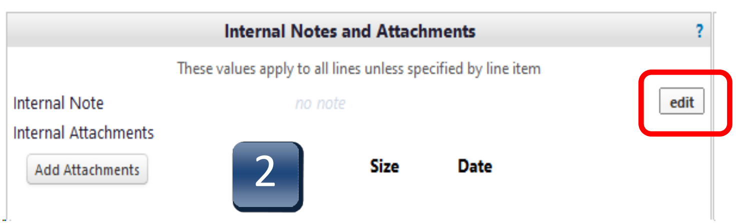
STEP 2: Click on **add attachments** .

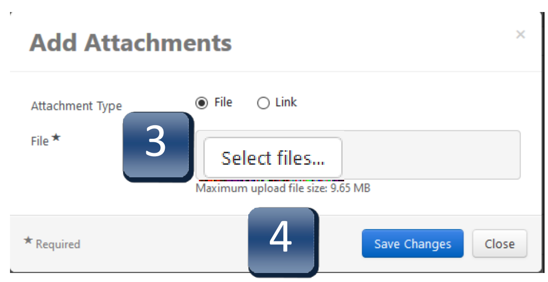
STEP 3: Click on **Select Files...** Choose file from saved location.

STEP 4: Click **Save Changes**.

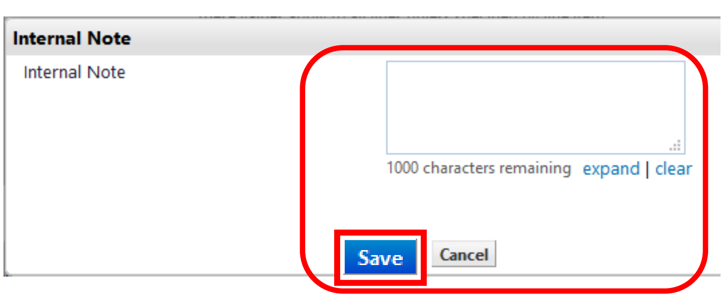


Internal Notes and Attachments





To add an internal note, click on edit, add your note and click **Save**.



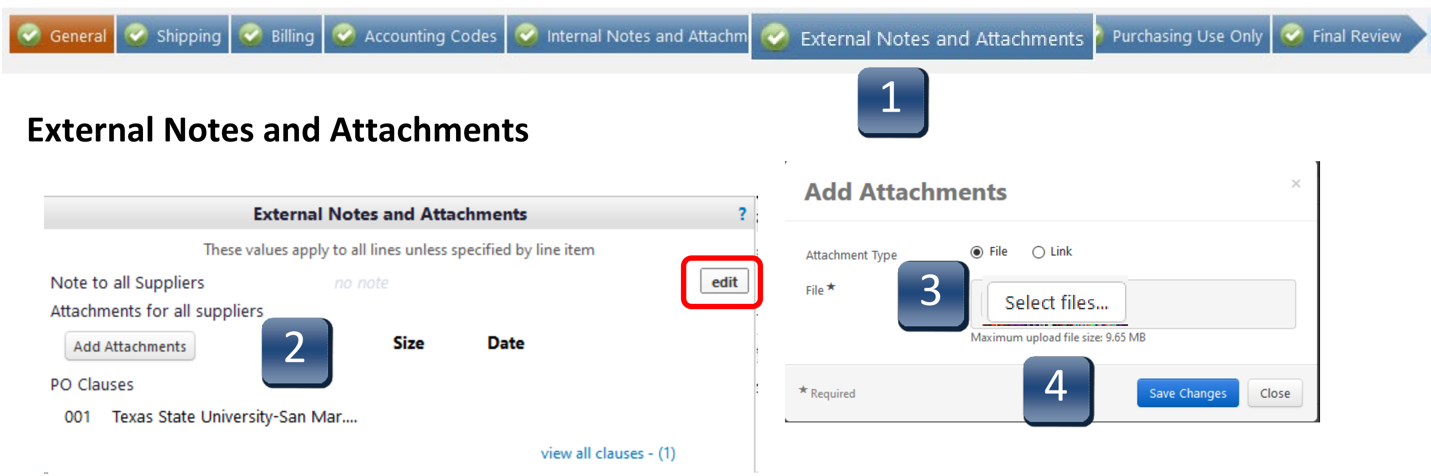
Completing the Checkout Process – External Notes and Attachments

STEP 1: Click on **External Notes and Attachments** tab. This is optional.
**External attachments are seen by the vendor. Use Internal for attachments for Purchasing or Accounts Payable offices, e.g. Sole Source/Proprietary form, Bids, Quotes, Proposals, etc.

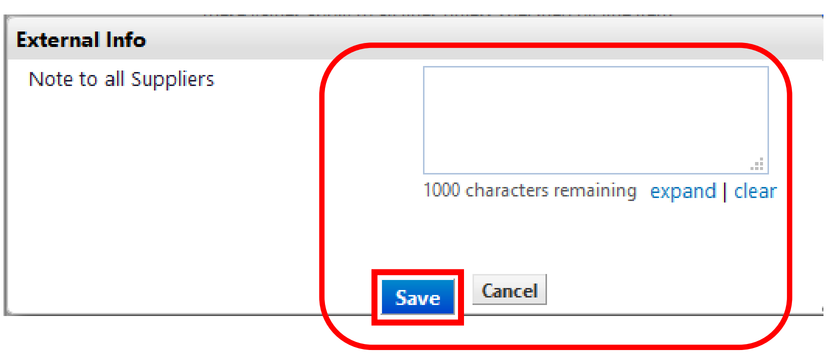
STEP 2: Click on **add attachments**.

STEP 3: Click on **Select Files...** Choose file from saved location.

STEP 4: Click **Save Changes**.



To add an external note, click on edit, add your note and click **Save**.

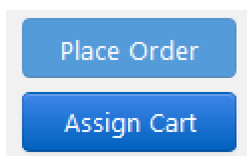


Completing the Checkout Process – Final Review

When all checkout process tabs have green checks indicating their completion, click Final Review to make ready for submission.

Based on your role, you may Place Order or Assign Cart.

Once you have corrected any missing information, your bar should have all green checks. If you do not have any Internal/External Notes or Attachments, click on **Final Review**. This will bring up the requisition. Review all information before you either **Place Orde**r or **Assign Cart**.



Completing the Checkout Process – Multiple Funding

A cart can have multiple funding splits in two ways:

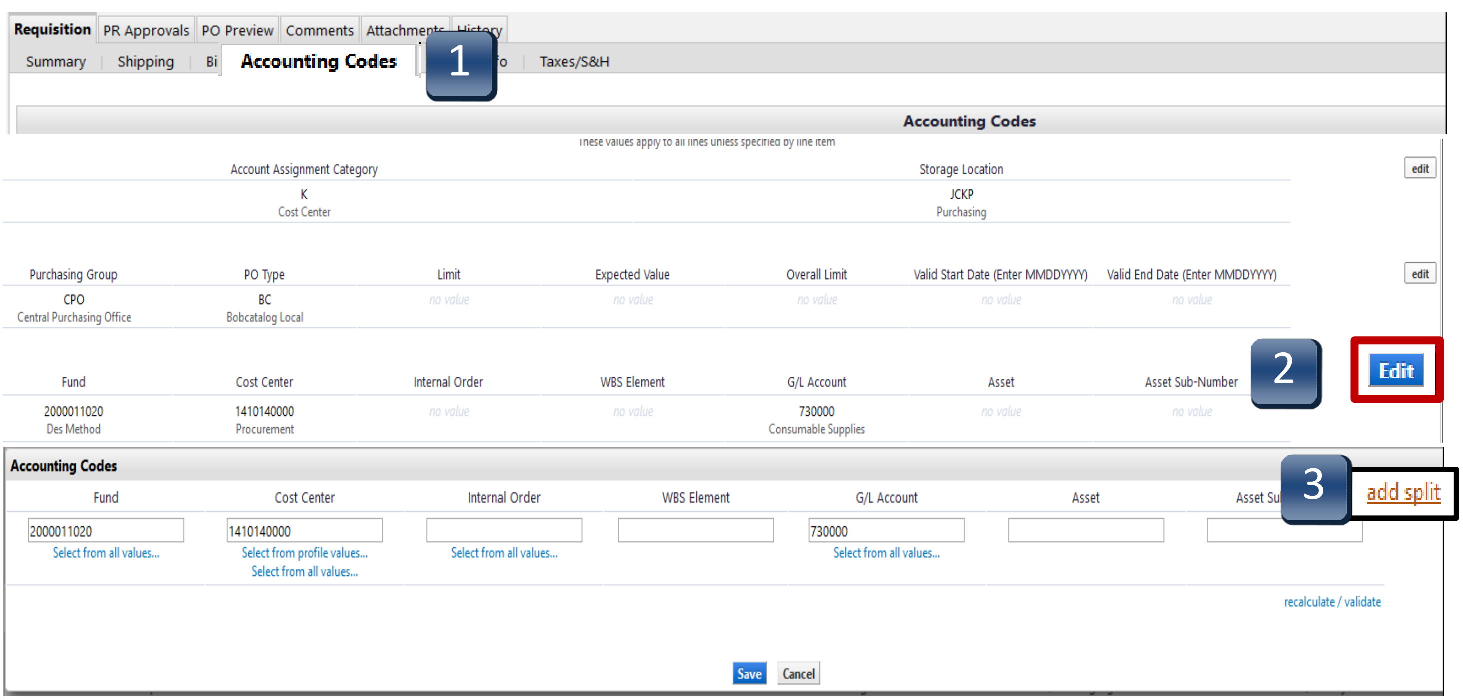
1. Split of entire cart by percentage
2. Split of individual line items by percentage or designated amount.

Entire Cart by Percentage

STEP 1: While the requisition is in the Final Review workflow, click on the **Accounting Codes** tab.

STEP 2: In the header area at the top of the Accounting Codes tab, click the third **edit** button. **Accounting Codes pop-up menu appears.**

STEP 3: Click **add split**. Second row of code fields appears.



Completing the Checkout Process – Multiple Funding

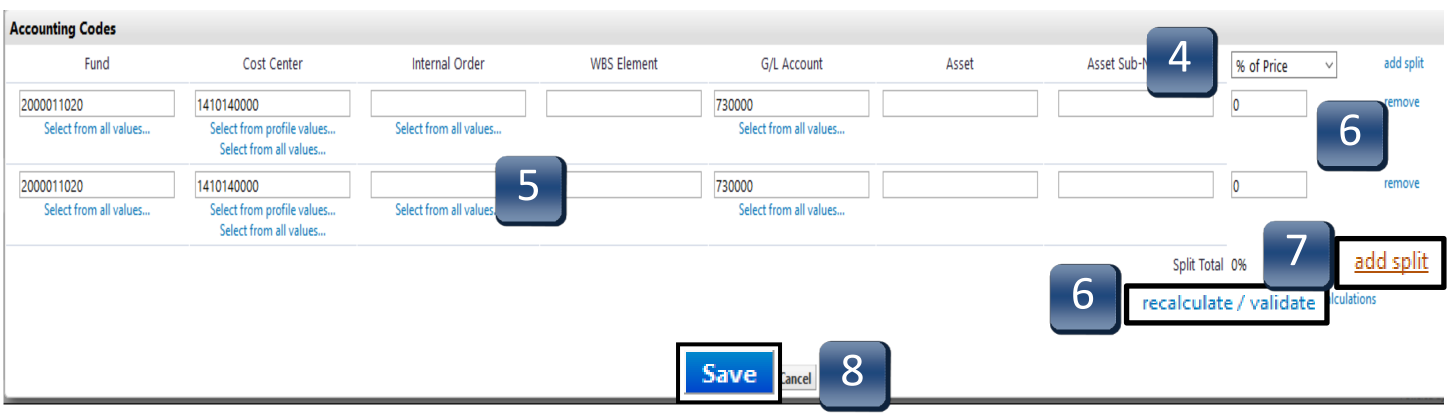
STEP 4: Selection can only be split by percentage. If you need to split by a certain amount, you must do this by line item.

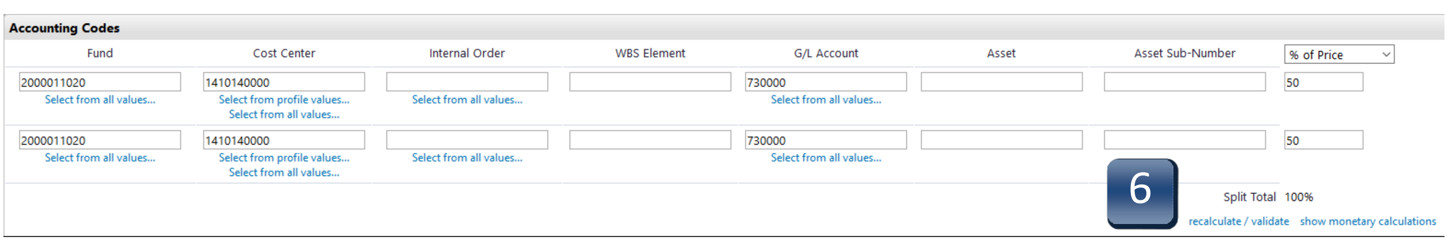
STEP 5: Over write the funding on the line(s) that you want to use for the split. You can also change the original funding.

STEP 6: Enter the percentage the cart will be split by. Once you have added the percentages, click on **recalculate / validate**. This will show the total percentage. The total percentage must be 100%.

STEP 7: If you will be splitting by 3 or more funds, click on **add split** and another line will be added.

STEP 8: Click **Save** when all splits have been added.





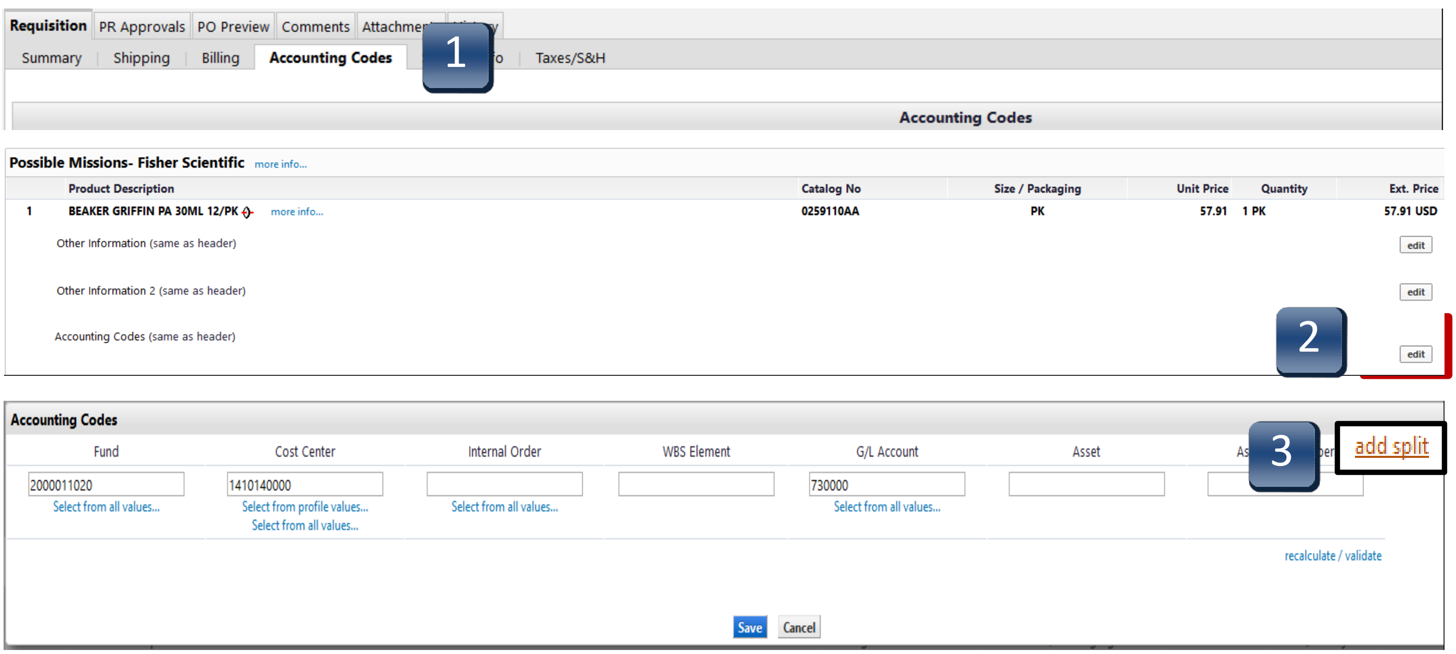
Completing the Checkout Process – Multiple Funding

Split by Line Item

STEP 1: While the requisition is in the Final Review workflow, click on the **Accounting Codes** tab.

STEP 2: In the line item area at the bottom of the Accounting Codes tab, click the third **edit** button—right above Supplier subtotal. Accounting Codes pop-up menu appears. **Note: You cannot split an asset that has been assigned an asset number

STEP 3: Click **add split**. Second row of code fields appears.

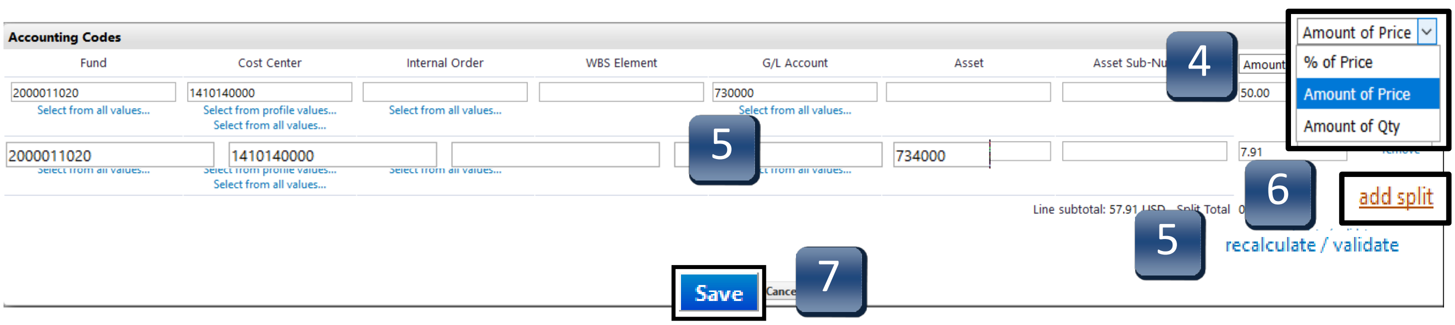


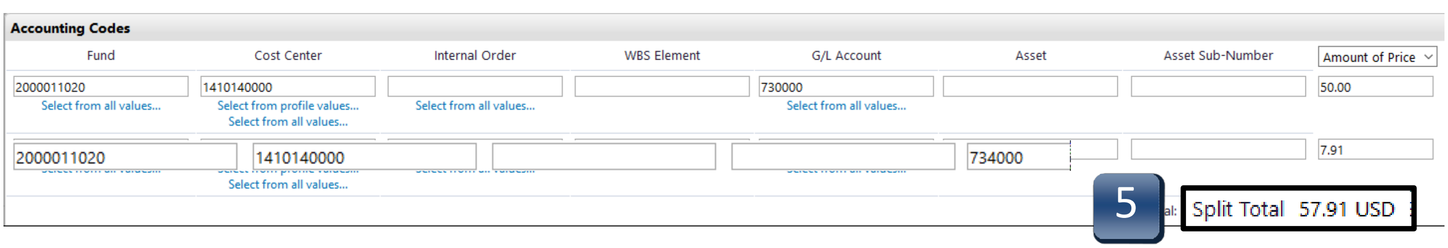
STEP 4: Choose the method of splitting the funding from the drop-down menu.

STEP 5: Enter the information for the second funding information. Once you have added the information, click on **recalculate / validate**. The Split Total must equal either 100%, total amount of line item and/or total quantity.

STEP 6: If you will be splitting by 3 or more funds, click on **add split** and another line will be added.

STEP 7: Click **Save** when all splits have been added.





Assigning a Cart

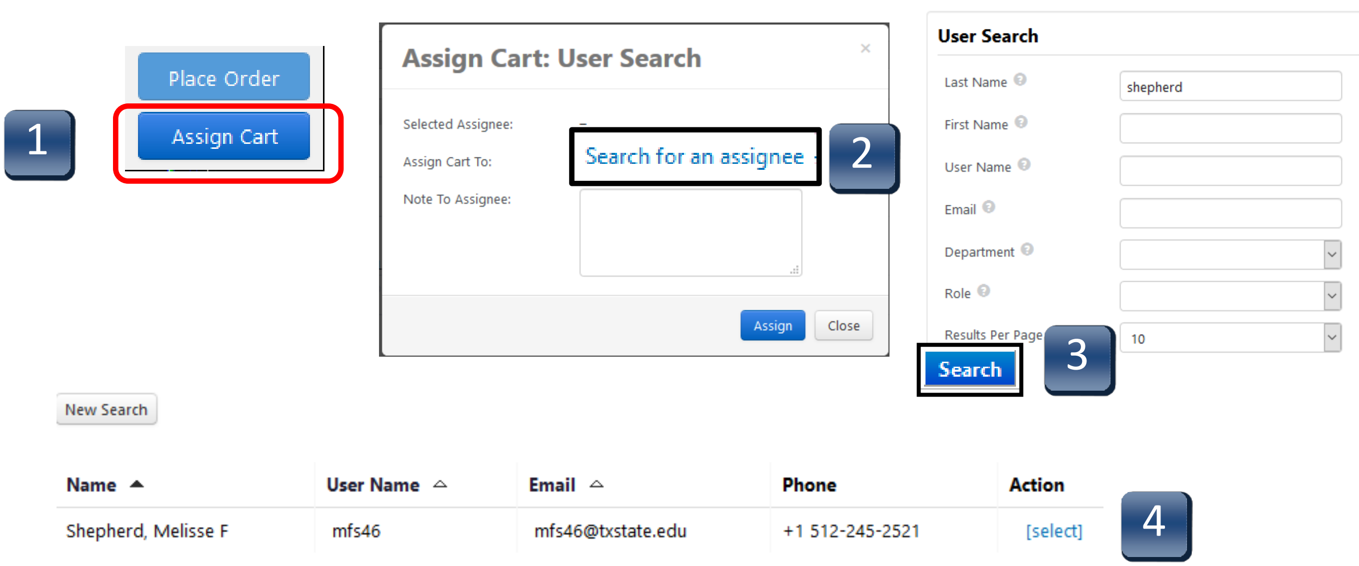
STEP 1: In the upper right corner, click **Assign Cart.**

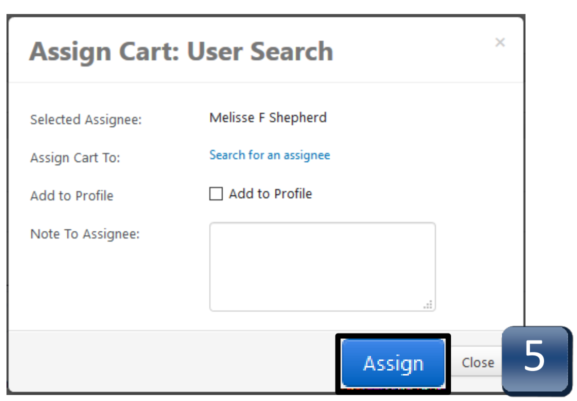
STEP 2: Click on **Search for an assignee.**

STEP 3: Enter the last name of the person you want to assign the cart to then click on **Search.**

STEP 3: Click **[select]** to choose desired assignee.

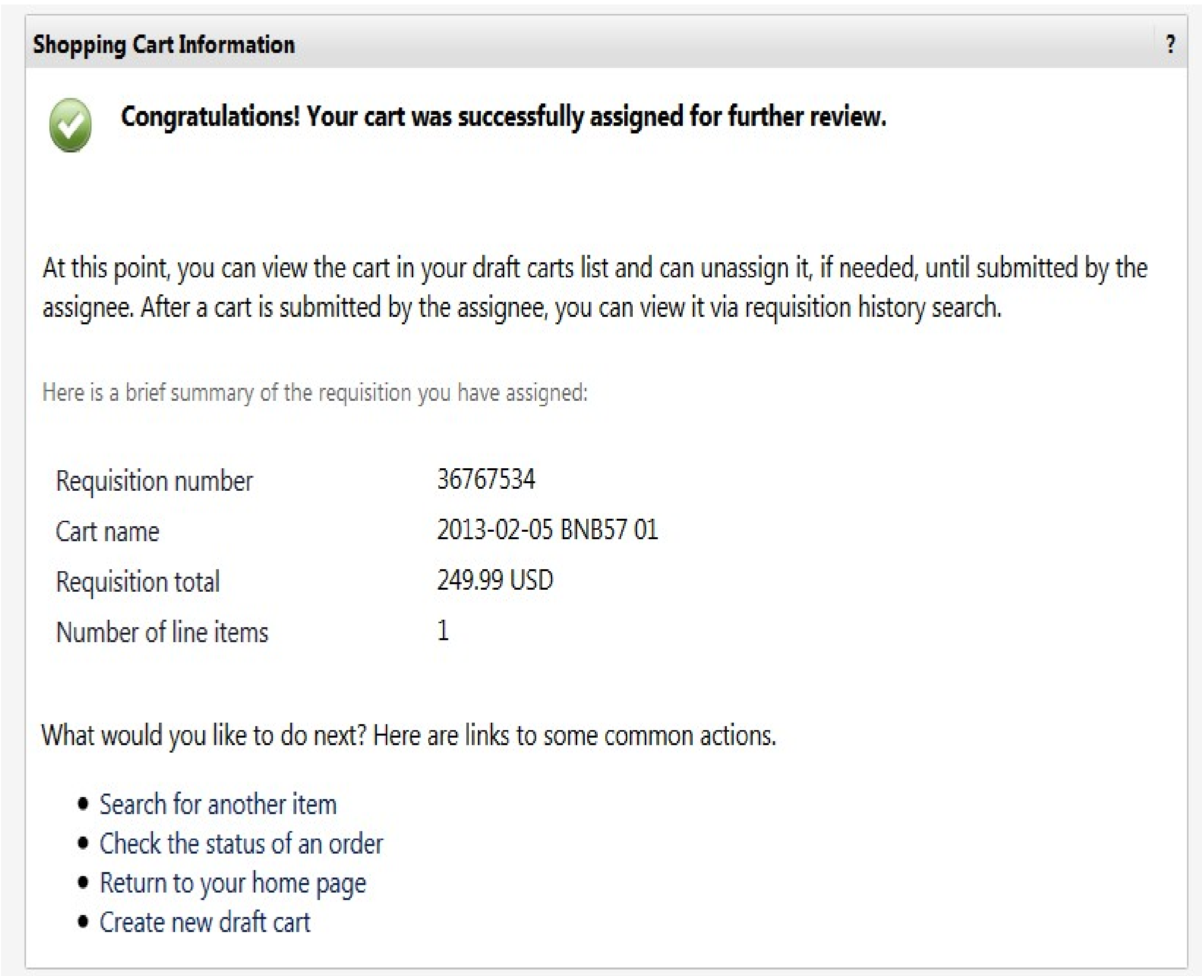
STEP 4: Click **Assign**. You should then see the person's name whom you are assigning the cart to in the Assign Cart box.





Reviewing an Assigned Cart

Once the cart is assigned, you will get a confirmation screen.



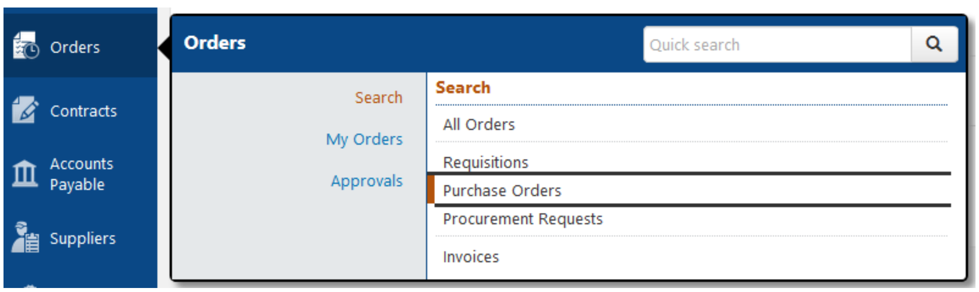
Document Search

Document Search can be used to locate

Purchase Orders and Requisitions

STEP 1: Click on **Orders** from the side navigation menu.

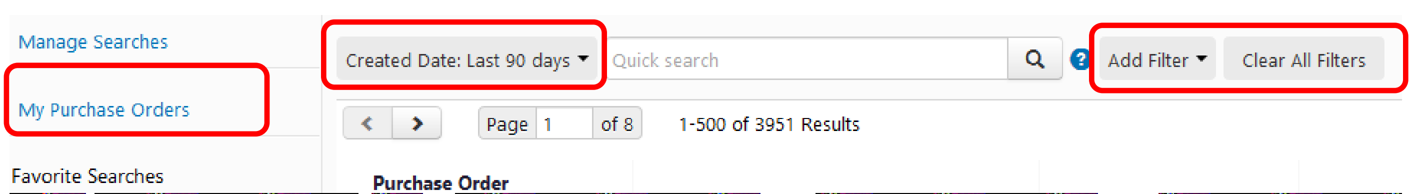
STEP 2: Click on **Search** and choose the type of document you want to search for

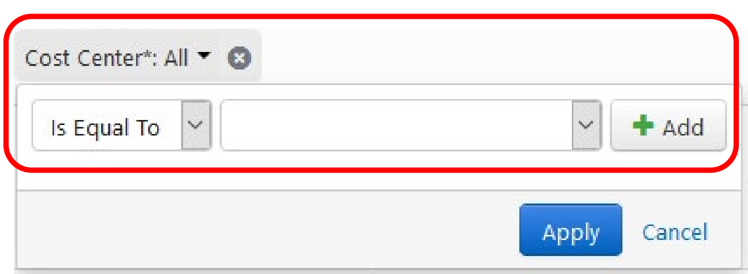


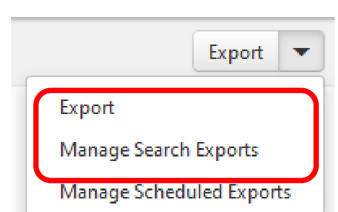
All completed purchase orders in the last 90 days will appear. You can change the time-frame to more or less days or just select My Purchase Order to see only the ones you have created.

You can also filter by various options. Click on the down-arrow next to Add Filter. You can choose more than one filter. Some of the filters will ask for additional information such as cost center, fund, etc.

You are also able to export your searches. In order to see the export file, click on Manage Search Exports.



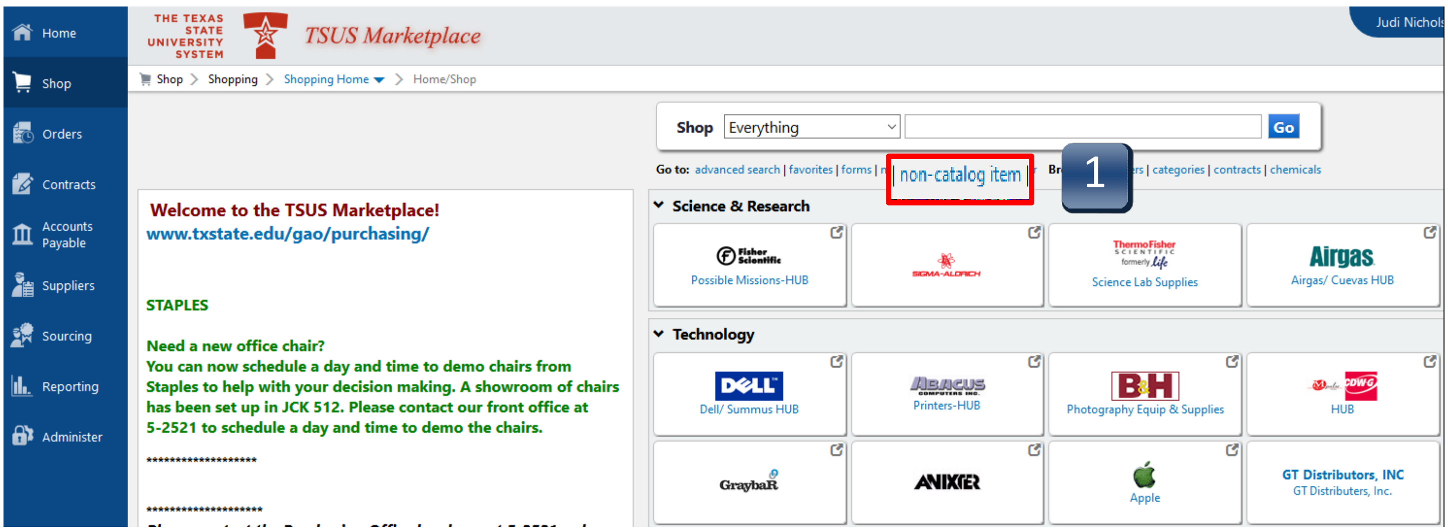




Create a Limit Framework Requisition

Limit Framework requisitions can be created in the TSUS Marketplace **for Non-Catalog SERVICES orders only.**

Step 1: Click on **Non-Catalog item.**



Create a Limit Framework Requisition

A pop-up screen will appear titled **Non-Catalog Item**.

Step 2: Enter Supplier- This is an active search field. Begin typing the name and the vendor will appear below. Select the vendor. If you do not see the vendor, contact purchasing to have the vendor **activated** for shopping. Once it has been activated, start from Step 2 and proceed forward.

Step 2A: Enter a description in **Product Description**.

Step 2B: Leave **Catalog No**. blank.

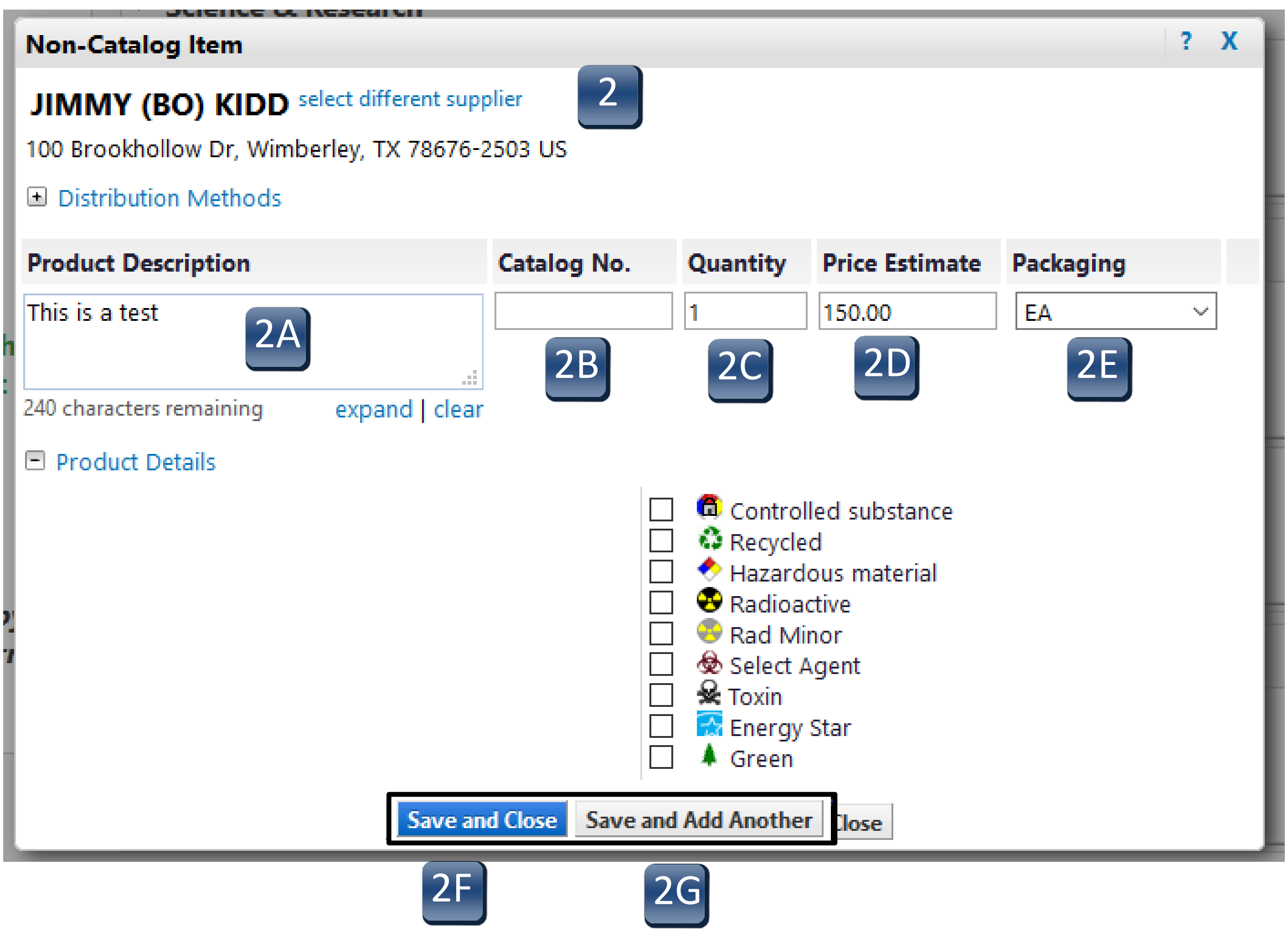
Step 2C: Enter one (1) in the **Quantity.**

Step 2D: Enter the amount to be paid for the first line in **Price Estimate.**

Step 2E: Select **EA** as an option under **Packaging.**

Step 2F: If you are adding another item select **Save and Add Another**.

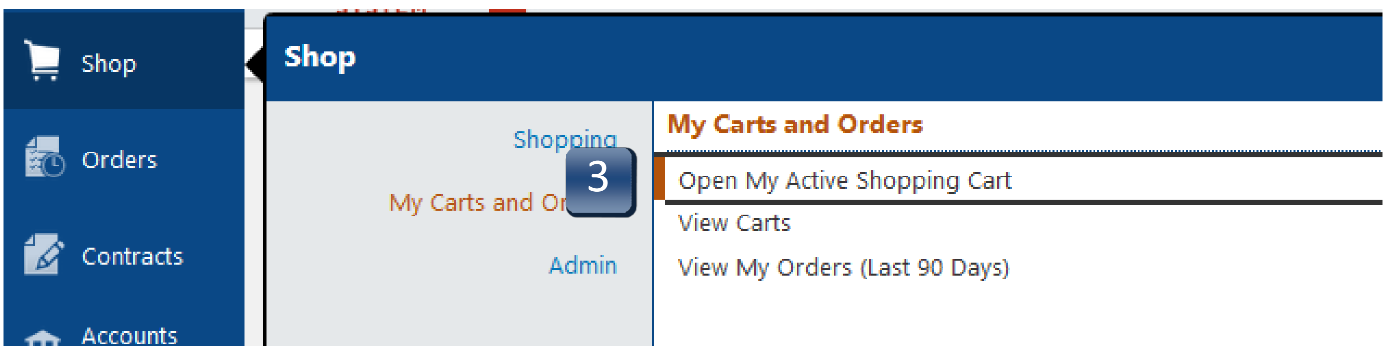
Step 2G: If you are only ordering one item, click **Save and Close** when complete.

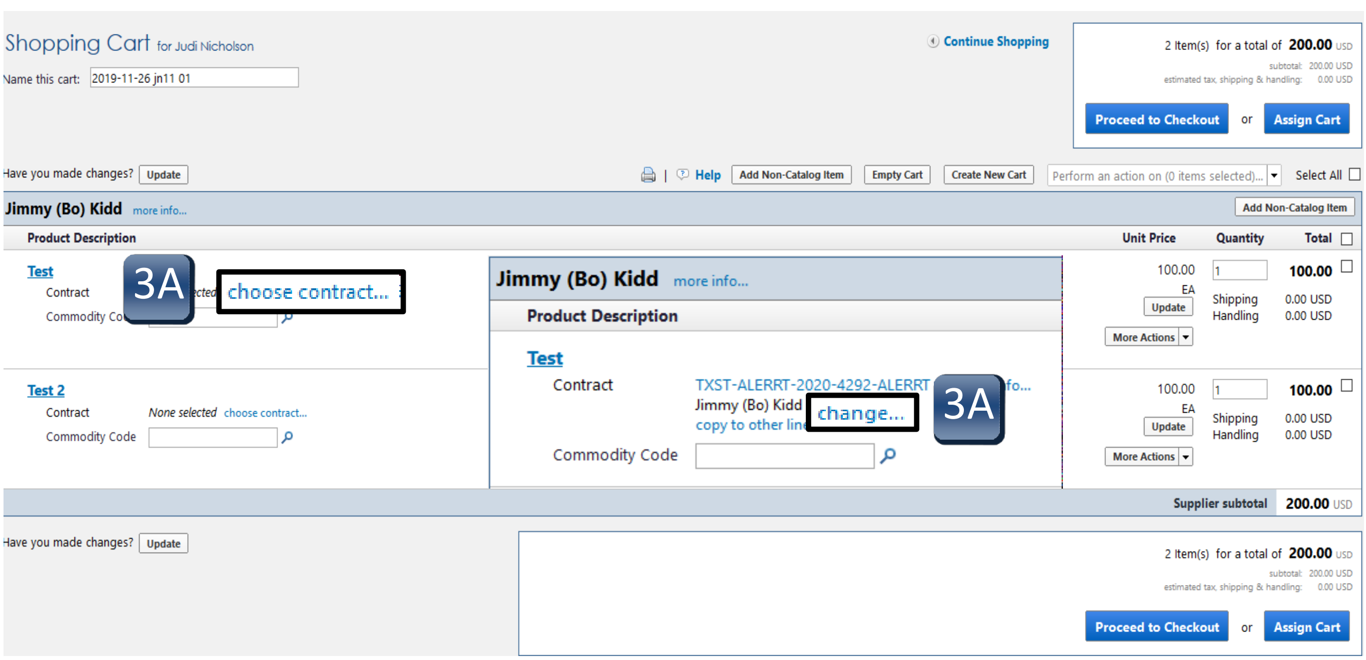


Create a Limit Framework Requisition

Step 3: On the left-hand menu ribbon, chick on the **Shop** icon, then choose the **My Carts and Orders** option and choose the **Open My Active Shopping Cart** option. This will list all your active shopping carts. Choose the one from which you want to create a limit framework requisition.

Step 3A: Before clicking **Proceed to Checkout**, check to see if there is a contract associated with the entity. Click on **Choose Contract**. A screen will pop-up with possible matches. Make sure you select the correct contract if there is one and click on **OK**. If there is not a contract, select **No Contract** and click on **OK**. If you have selected an incorrect contract, you can click on **Change Contract** to make changes. Do this for each line.

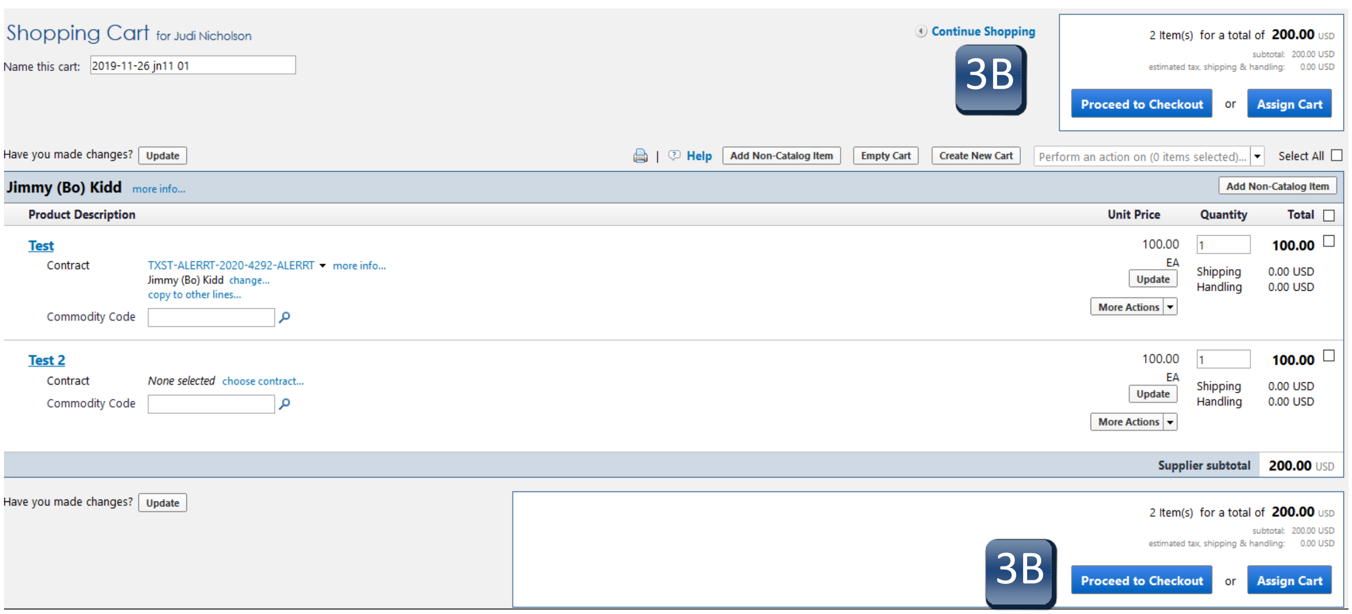


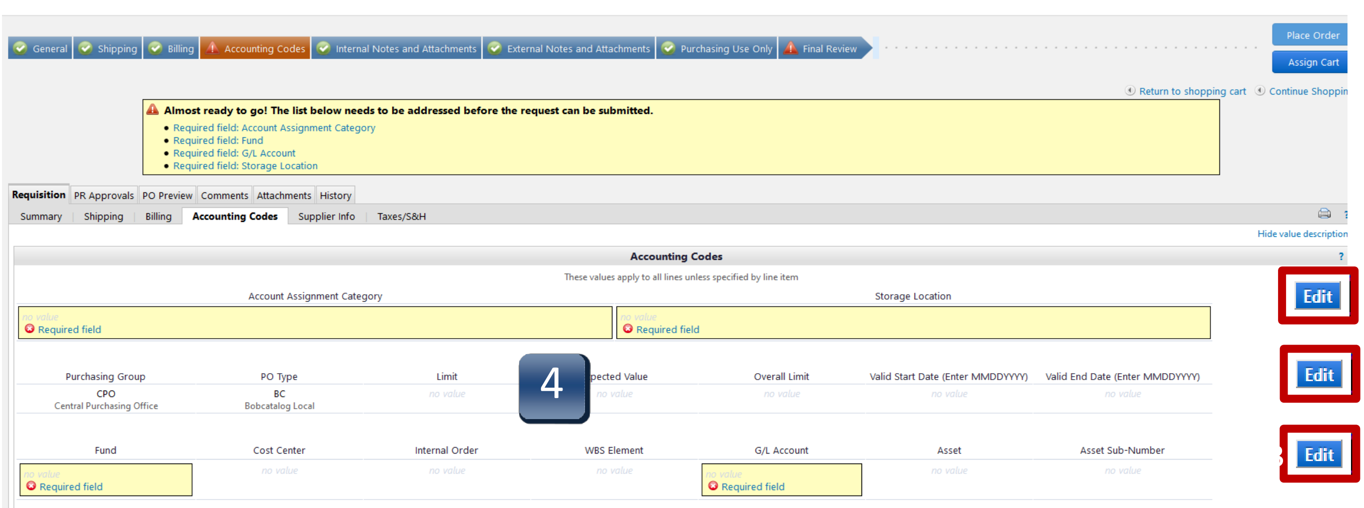


Create a Limit Framework Requisition

Step 3B: At the next screen click on **Proceed to Checkout**.

Step 4: The **Header Accounting Code** section, as shown below, applies to every line. If you need different accounting codes on different lines, then you must change each line's accounting codes on the requisition. Only lines that **<u>differ</u>** from the Header Accounting Code section will need to be changed. Enter in the information in all the **Required Field** areas making sure that the correct account combination is entered; and then click **Save**. Click on the **Edit** button to the right of each accounting code lines.



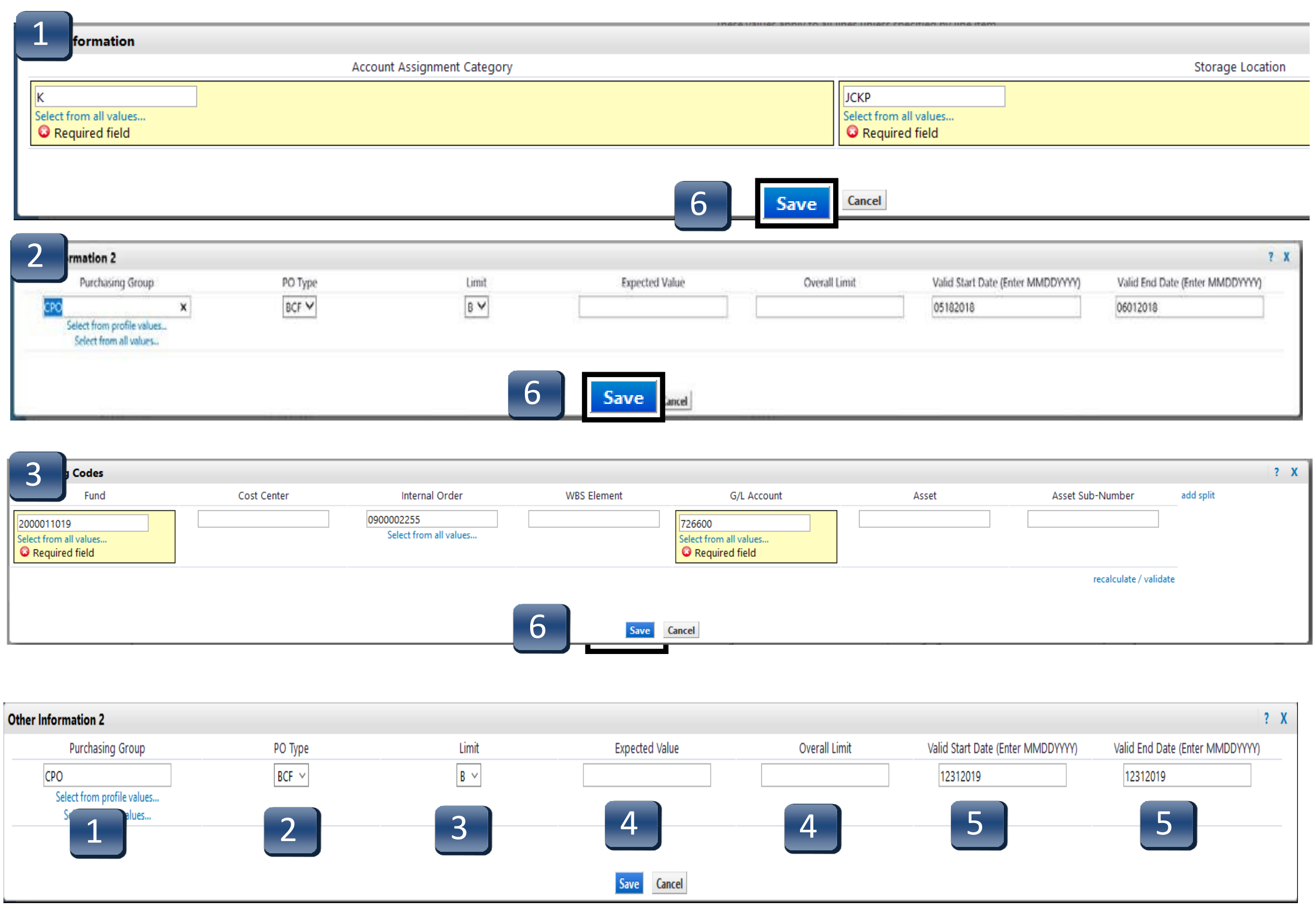


Create a Limit Framework Requisition

Step 5: To setup the Limit Framework, select **edit** on the second line in the **Header Accounting Codes** section and enter the following:

1. Select the correct **Purchasing Group**; CPO for most of the campus.
2. Change the **PO Type** to **BCF**;
3. Under **Limit** Select **B**.
4. Leave **Expected Value** and **Overall Limit** blank.
5. Enter a valid start date and end date for the Framework.
6. Click **Save** after all data in the **Header Accounting Codes** is entered correctly.

*****It is critical that the dates are entered as shown in the example MMDDYYYY. The framework order will fail and not post into SAP if entered incorrectly.*****

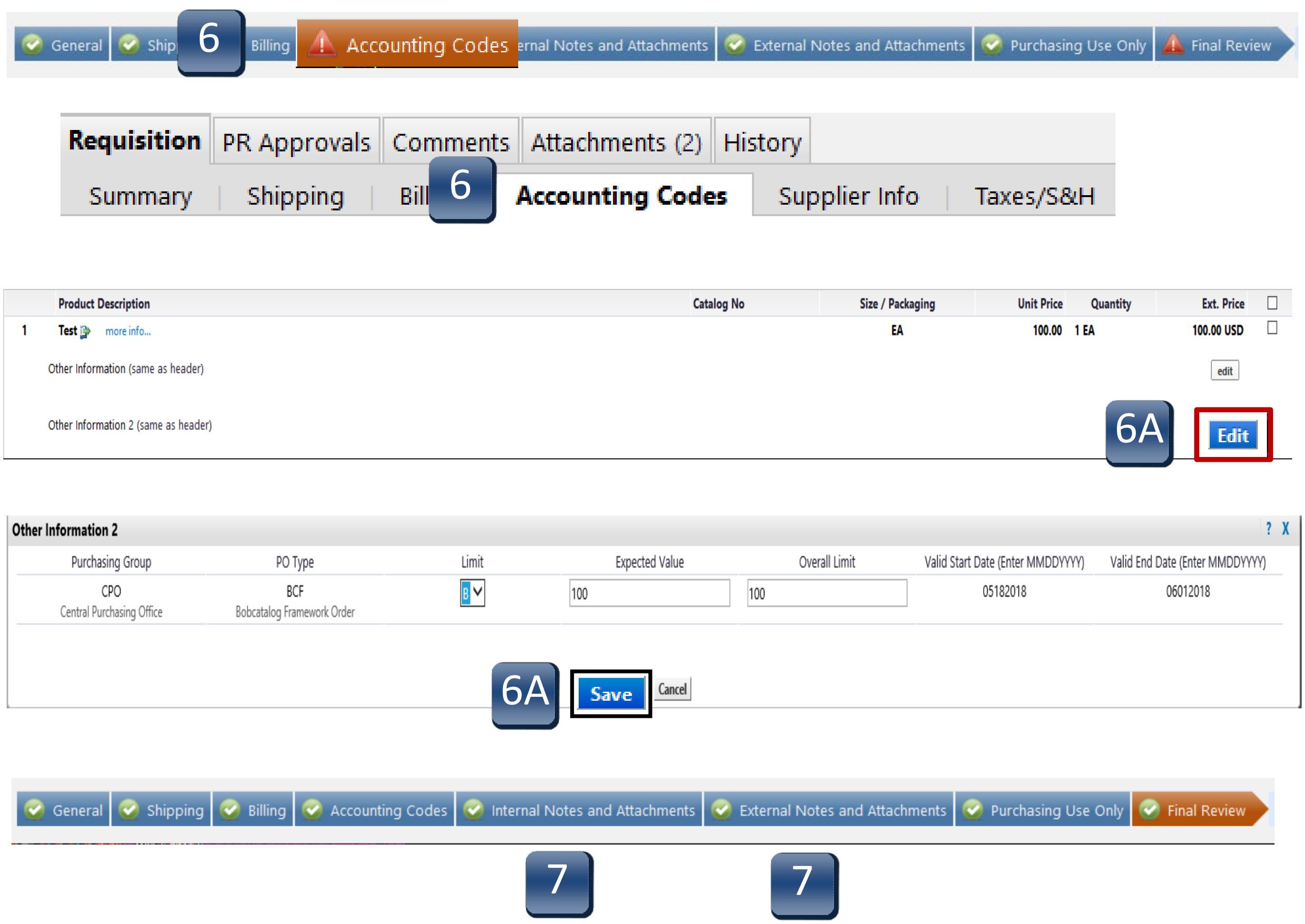


Create a Limit Framework Requisition

Step 6: To set the **Expected Value** and **Overall Limit** for each line, make sure the **Accounting Codes** tab is selected; scroll down to the **Product Description** section.

Step 6A: For line **1**, click on the **edit** button to the right of **Other Information 2 (same as header)** line. A pop-up screen will appear that will allow you to enter the **Expected Value** and the **Overall Value**. When you have finished, click on the **Save** button. Make sure that for each line, you click **edit** and enter the **Expected Value** and the **Overall Value**, clicking on the **Save** button after each entry.

Step 7: If you need to attach any internal or external notes and or attachment, proceed to those tabs. Once the notes and attachments sections are complete or you do not have any, proceed to the **Final Review** tab. (See Completing the Checkout Process – Internal and External Notes and Attachments)



Create a Limit Framework Requisition

Step 8: On the **Final Review** it will be noted if you have completed all the required fields. If you have not, you will need to complete them before you can place the order or assign the cart. There may be a note stating that there is an error, but it will not prevent you from placing the order or assigning the cart. Review the **Accounting Code** section to ensure the correct values are entered for the framework values and the account assignment values. Click on **Place Order** or **Assign Cart** as applicable. If not a requisitioner, only the **Assign Cart** option will be available. Once the cart is placed into order, the requisition will go through the standard workflow for approvals. After approvals, the order is sent to the vendor and imported into SAP. Login into SAP and view the framework order.